

Topics Covered in this Manual:

1. Submitting the Loan

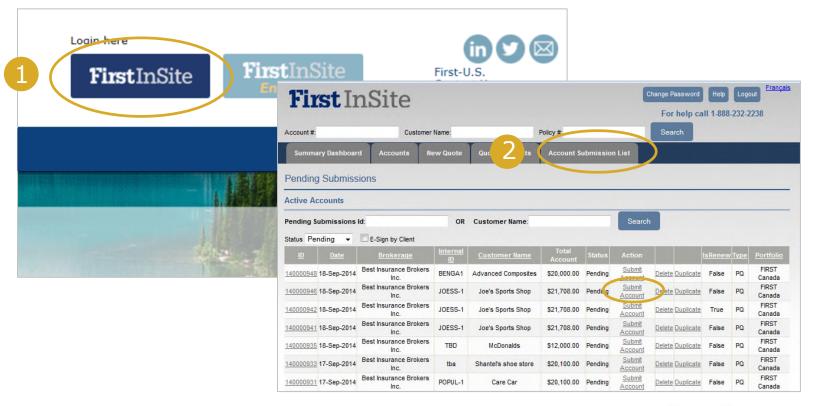




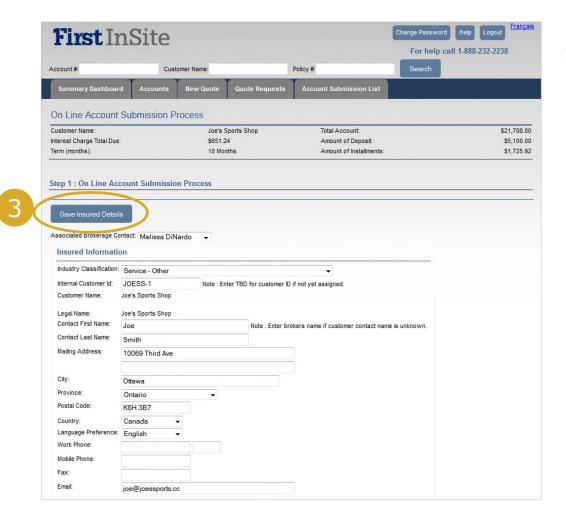
FirstInSite

Loan Submission

- 1. Login to First Insite User Name and Password
- Using the tabs at the top, select Account Submission List, locate the contract and click Submit Account



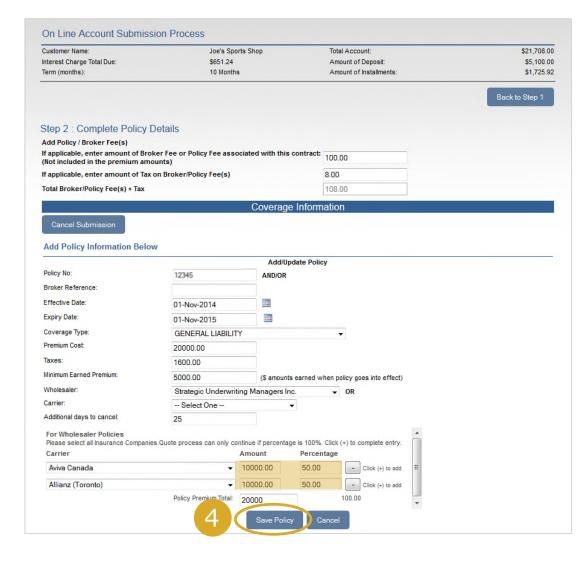




3. Complete any missing client contact information; click
Save Insured
Details

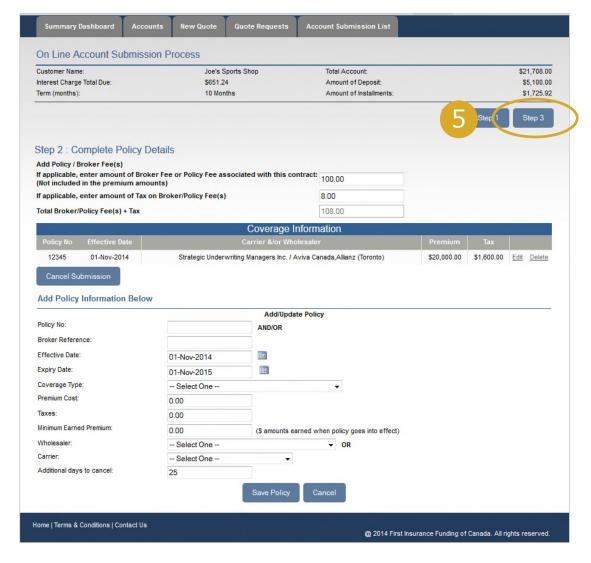
NOTE: if the insured's details are completed during quoting, this screen will not appear and you will go directly to Step 2 of the submission process





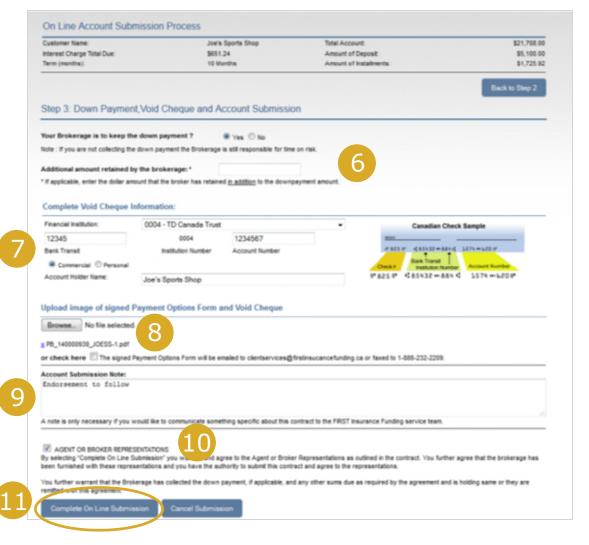
 Complete Policy Details and click Save Policy. For MGA policies, enter the subscribing companies, clicking "+" after each entry





5. Once all coverage information has been entered, click **Step 3**

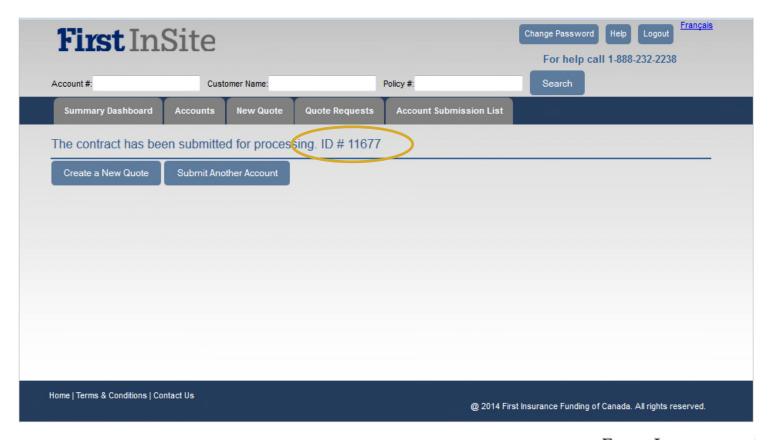




- 6. Confirm down payment and any additional retained amounts
- 7. Enter insured's banking information
- 8. Upload copy of the signed Premium Finance Agreement and VOID cheque
- 9. (Optional) If you have any special instructions, enter a Loan Submission Note.
- 10. No need to sign, email, or fax; simply click to agree to the statement
- 11. Click Complete On Line Submission



12. Receive confirmation that your contract has been submitted for processing







Contact a member of your dedicated service and support team with any questions or you can reach us at:

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1 888 232 2238