



1. From the **Policies** page (shown below), click on the **Accounts** tab in the left corner, or click on the **Account name hyperlink** under the Policies section.

The screenshot shows the 'Policies' page. The 'Accounts' tab is highlighted in the top left. A red arrow points to the 'Policies' tab. A red box highlights the 'Account' column in the table below.

Product	Status	Policy Number	Account	Named Insured	Premium	Effective Date	Expiration Date
General Liability	In Force	1061275598	Saratoga Snow	Saratoga Snow	\$25,560.00	Mar 2, 2026	Mar 2, 2027
General Liability	In Force	1061222456	DMB Testing AK WC LLC	DMB Testing AK WC LLC	-	Jul 1, 2025	Jul 1, 2026
Commercial Property	In Force	1061282726	Commercial Property Policy Lifecycle Test WI	Commercial Property Policy Lifecycle Test WI	\$5,815.00	Jan 16, 2026	Jan 16, 2027
Commercial Umbrella	In Force	1061279070	Test RK CA	Test RK CA	\$1,200.00	Jan 2, 2026	Jan 2, 2027
Workers Compensation	In Force	1061270826	Erica's 3rd PE Test	Erica's 3rd PE Test	\$52,058.00	Nov 24, 2025	Nov 24, 2026
Commercial Auto	In Force	1061284529	Tyler Eastern PE Test Inc	Tyler Eastern PE Test Inc	\$1,364.00	Mar 1, 2026	Mar 1, 2027

2. Under the **Accounts** tab, use the tiles to find the Account and choose the name **hyperlink**.

The screenshot shows the 'Accounts' page. The 'Accounts' tab is selected. Below the tabs are four tiles: 'Recently Viewed', 'Recently Created', 'Personal Accounts', and 'Commercial Accounts'. The 'Recently Viewed' tile is active, showing a table of accounts.

Account	Type	Policies	Date Created
Mike's Biz	Commercial	0	Dec 10, 2025
Rockin Robin's Birdhouses	Commercial	0	Dec 10, 2025
Frosty Palace	Commercial	6	Aug 12, 2025
Cane You Dig It?	Commercial	1	Dec 4, 2025
MM ProducerEngage	Commercial	3	Oct 13, 2025
Bob's Burgers	Commercial	0	Dec 3, 2025
Test_MI	Commercial	61	Aug 29, 2025
Bluth's Banana Stand	Commercial	0	Jun 11, 2025
Weyland Yutani Inc	Commercial	1	Sep 26, 2025
Sophia's Sandals	Commercial	0	Apr 22, 2025

3. On the **Account Summary** page, choose the **Documents** tile.

Accounts Policies **Claims**

Frosty Palace(A106195487)

Summary Contacts **21 Documents** 0 Claims Billing & Payment Billing Activity

Summary Details

Frosty Palace
390 N Dow Mountain Dr
-
Hoodspout
WA 98548
Terrorism Risk Insurance Program Applies

Yes - For the applicable lines of insurance

Customer Since: Aug 12, 2025
Account Status: Active
Email Address: -
Phone Number: (201) 783-6846
Agency Print Preference: -
Terrorism Risk Insurance Act: Is in Effect for the Next 12 Months
Coverage For Certified Acts of Terrorism: Yes

Agency Information

0 Open Renewals
0 Open Cancellations
2 Open Changes
1 Open Audits

Total Issued Premium: \$0.00

Edit Details View Prior Policies

4. The first section of documents on this page is the **Account Documents**. Here, you may find quote proposals, policy declarations, policy notices, and more.

Frosty Palace(A106195487)

Summary Contacts **21 Documents** 0 Claims Billing & Payment Billing Activity

Documents

+ Upload Attachment

Filter By All

Search Filter By All

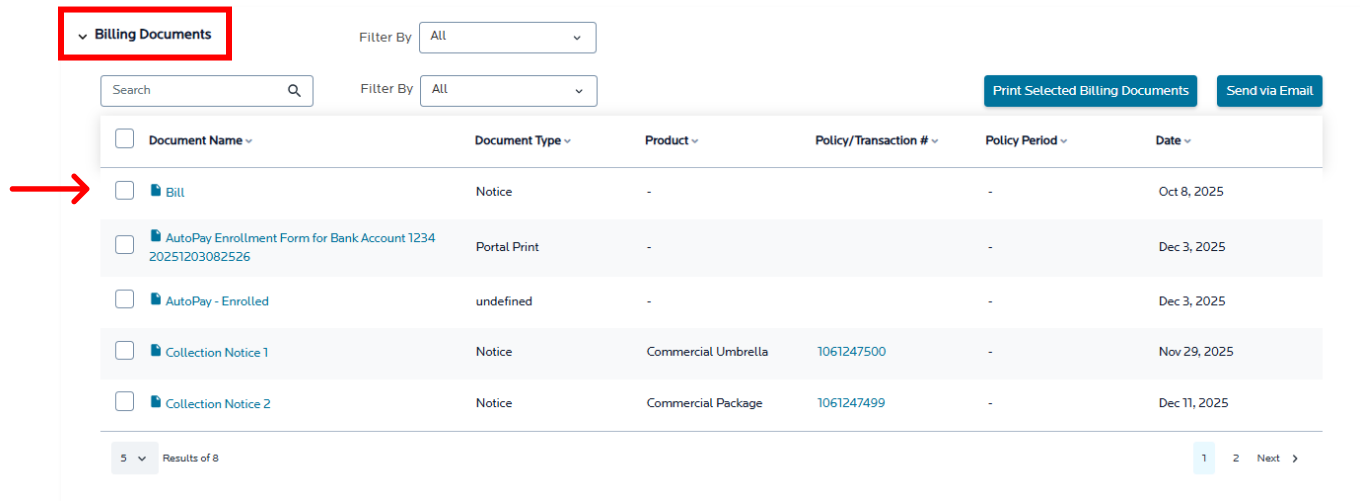
Print Selected Account Documents Send via Email

☐ Document Name	Document Type	Product	Policy/Transaction #	Policy Period	Date
☐ Policy Cancelled	Notice	Commercial Package	1061266530	11/01/2025 - 11/01/2026	Nov 22, 2025
☐ Notice of Intent to Cancel	Notice	Commercial Package	1061266530	11/01/2025 - 11/01/2026	Nov 8, 2025
☐ Quote Proposal	Portal Print	-	-	-	Aug 28, 2025

5 Results of 13

< Prev 1 2 3

5. The next section is the **Billing Documents**. Here, you may see bills, AutoPay forms, and more.



Filter By: All

Search: [] Filter By: All

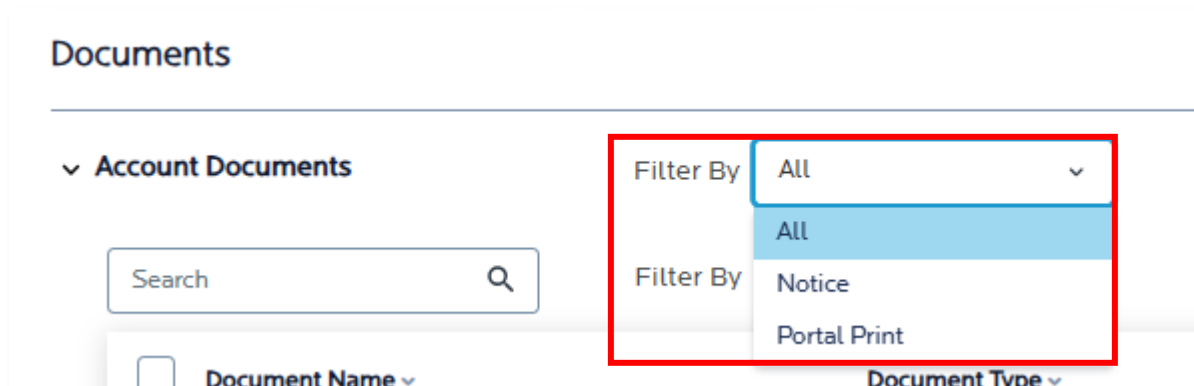
Print Selected Billing Documents Send via Email

☐	Document Name	Document Type	Product	Policy/Transaction #	Policy Period	Date
☐	Bill	Notice	-	-	-	Oct 8, 2025
☐	AutoPay Enrollment Form for Bank Account 1234 20251203082526	Portal Print	-	-	-	Dec 3, 2025
☐	AutoPay - Enrolled	undefined	-	-	-	Dec 3, 2025
☐	Collection Notice 1	Notice	Commercial Umbrella	1061247500	-	Nov 29, 2025
☐	Collection Notice 2	Notice	Commercial Package	1061247499	-	Dec 11, 2025

5 Results of 8

1 2 Next >

6. There are filtering options for both sections of documents. The top filter is for **document type**, and the bottom filter is for **line of business**.



Documents

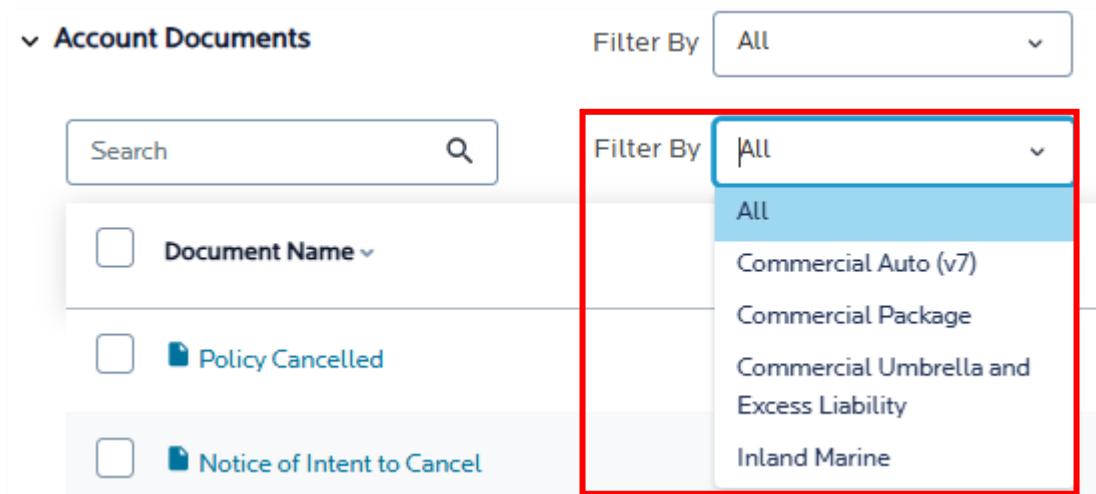
Account Documents

Search: []

Filter By: All

Filter By: All Notice Portal Print

Document Name Document Type



Account Documents

Filter By: All

Search: []

Filter By: All

Document Name

Policy Cancelled

Notice of Intent to Cancel

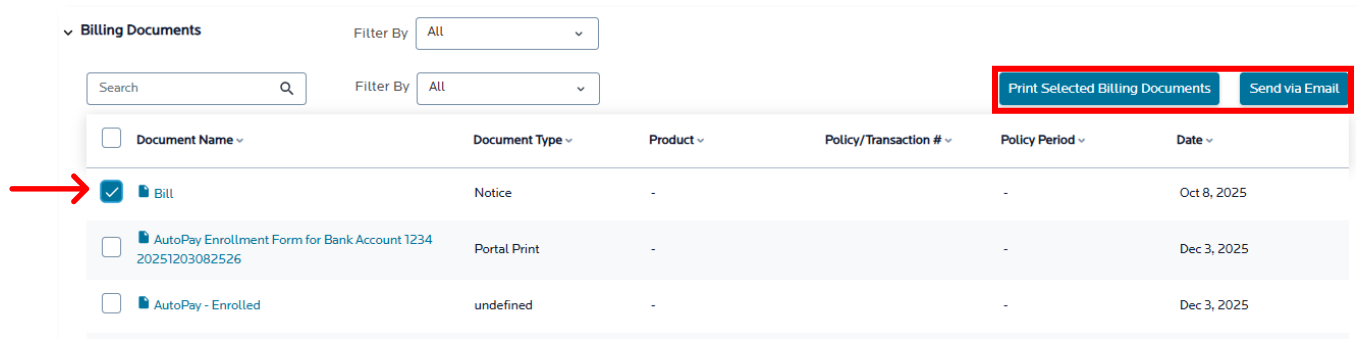
Commercial Auto (v7)

Commercial Package

Commercial Umbrella and Excess Liability

Inland Marine

7. There is also an option to **Print Selected Document** or **Send via Email**. For either option, check the boxes next to the document(s) and click one of the buttons.
- Print Selected Document** will save the document to your computer as a PDF.
 - Send via Email** will prompt you to enter the recipient and add text to the body of the email.



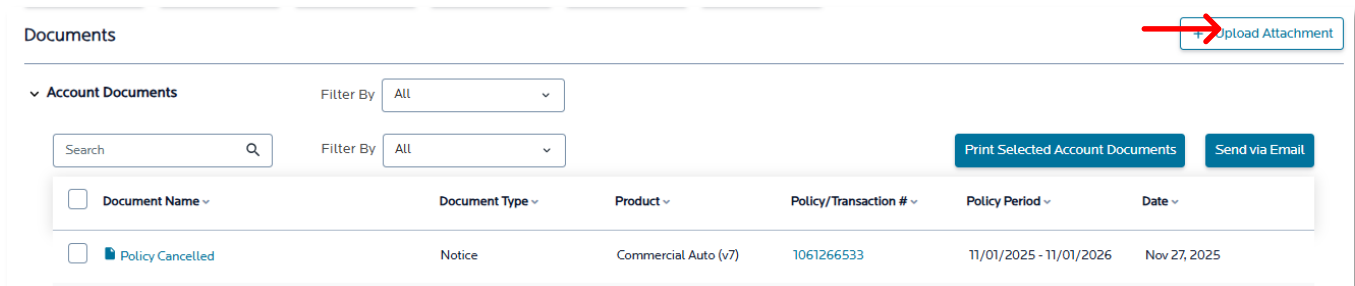
▼ Billing Documents Filter By All

Search Filter By All

Print Selected Billing Documents Send via Email

☐	Document Name ▼	Document Type ▼	Product ▼	Policy/Transaction # ▼	Policy Period ▼	Date ▼
☒	Bill	Notice	-	-	-	Oct 8, 2025
☐	AutoPay Enrollment Form for Bank Account 1234 20251203082526	Portal Print	-	-	-	Dec 3, 2025
☐	AutoPay - Enrolled	undefined	-	-	-	Dec 3, 2025

8. There is also the option to upload a document into Navigator. Choose the **Upload Attachment** button.
9. **Once a document is uploaded to Navigator, it cannot be removed or deleted.



Documents

▼ Account Documents Filter By All

Search Filter By All

Print Selected Account Documents Send via Email

☐	Document Name ▼	Document Type ▼	Product ▼	Policy/Transaction # ▼	Policy Period ▼	Date ▼
☐	Policy Cancelled	Notice	Commercial Auto (v7)	1061266533	11/01/2025 - 11/01/2026	Nov 27, 2025

Upload Attachment

10. Use the drop-down to select the **Document Type**, enter a **Description**, then you can drag and drop a file or browse your files. Choose **OK**.

The image shows a dialog box titled "Upload Attachments". It contains three main input fields: "Document Type" (a dropdown menu with "Please Select" and a downward arrow), "Description" (a text input field), and "Upload Attachment" (a dashed box containing the text "Drag and drop a file here" and an "Upload file" button with a cloud icon). At the bottom right, there are "Cancel" and "OK" buttons. Red arrows point to the "Document Type" dropdown, the "Upload file" button, and the "OK" button.

Upload Attachments

Document Type * Please Select

Description

Upload Attachment *

Drag and drop a file here

Upload file

Cancel OK