



Navigator Billing and Payment Commercial Lines

Billing Summary
Click on a billing account tab for details.

106179540003 106179540002 106179540001

View Invoices Make a Payment View Policies Manage AutoPay Manage Saved Payment Methods Manage Scheduled Payments

Minimum Due \$22,473.80 Due Date 11/16/2024 Account Balance \$115,884.00

Next Planned Invoice Amount * \$9,261.82 Due Date 12/16/2024

Last Payment \$5.00 Paid 10/23/2024

Make a Payment

*This amount is subject to change.

Policies

Policy Type	Policy Number	Effective Date	Expiration Date	Total Premium	Payment Plan	Status
Commercial Auto	1061167971	9/24/2024	9/24/2025	\$1,366.00	MONTHLY CL	Active
Workers' Compensation	1061167972	9/24/2024	9/24/2025	\$4,997.00	MONTHLY CL	Active

1. Let's walk through some features of Navigator. The customer is able to manage and view many of the billing functions associated with their policies.
2. When they go to the **"Billing & Payment"** tab, they will see the **"Billing Summary"** page. They will first see some payment details, such as their **"Account Balance"**, and they will be able to **"Make a Payment"** using that button.
3. The customer's active policies under the highlighted invoice stream are also listed at the bottom. They can view the policy page by clicking the **"Policy Number"** hyperlink.

4. At the top of the page, there are tabs labeled by **invoice stream** number. Their policies will be organized by these numbers which are determined by the payment parameters. The customer should select the correct invoice stream number for the policy or policies they want to view or perform billing actions on.

Invoices Detail

Invoices to Pay Paid Invoices Payment History

Print

Invoice Number	Policy Type	Policy Number	Due Date	Bill Status	Amount	Payment	Minimum Due
1100088825	Workers' Compensation	1061163643	10/10/2024	Due	\$439.30	\$439.30	\$0.00
	Commercial Auto	1061163645	10/10/2024	Due	\$174.70	\$174.70	\$0.00
	Account Charge		10/10/2024	Due	\$1,200.00	\$1,000.00	\$200.00
1100088826	Workers' Compensation	1061163643	11/10/2024	Billed	\$219.07	\$219.07	\$0.00
	Commercial Auto	1061163645	11/10/2024	Billed	\$87.13	\$87.13	\$0.00
	Workers' Compensation	1061165515	11/10/2024	Billed	\$17,105.40	\$0.00	\$17,105.40
	Workers' Compensation	1061165515	11/10/2024	Billed	\$3,597.00	\$0.00	\$3,597.00

5. There are also a series of **hyperlinks** that will allow the customer to perform billing actions. We will look through each action and how to use them.
6. Starting with the **"View Invoices"** hyperlink, the customer will be able to see the invoices related to the invoice stream selected. (If there is ever confusion about viewing the wrong policy, remind them about the invoice stream tabs.)
7. On this page, there are three buttons to choose, **"Invoices to Pay"** (shown to the left), **"Paid Invoices"**, and **"Payment History"**. The customer can view the invoices with a balance. There is also a **"Print"** button they can use to print this page.



Make a Payment

Policies

Commercial Auto	1061167571
Workers' Compensation	1061167572
Workers' Compensation	1061165515
Commercial Auto	1061165516
Commercial Auto	1061163645
Workers' Compensation	1061163646

Payment Options

Minimum Amount ☐ \$22,473.80

Account Balance ☐ \$115,084.00

Other

8. If they choose **"Make a Payment"**, they will see the screen to the side. It shows the **"Policy"** and **"Payment Options"**. They can put a check mark next to either payment amount then choose **"Pay Now"**. This will take them to the payment screens.

Manage AutoPay

To change your payment plan or choose an alternative payment due date, please contact your agent for assistance.

Due Date: Dec 10, 2024

Policies

Commercial Auto	1061167571
Workers' Compensation	1061167572
Workers' Compensation	1061165515
Commercial Auto	1061165516
Commercial Auto	1061163645
Workers' Compensation	1061163646

If you have a current bill, the payment for that bill will not draft automatically. You will have to wait until the next bill.

Source: Bank Account

Account Type: ☒ Checking ☐ Savings

Account Number:

Routing (ABA) Number:

Bank Name:

☐ I have read and accepted the Terms & Conditions.

9. The **"Manage AutoPay"** link brings them to the screen to the left. They can set up AutoPay by filling in their bank information and choosing **"Set Up AutoPay"**. There are a few things to note here:
- If the customer wants to change the payment plan or payment date, they need to contact their agent.
 - If they want to set up AutoPay and there is a current bill, the AutoPay will not apply until the next cycle.

Saved Payment Methods

Manage your Payment Methods

Summary	Date/Time Added (CST)	
Visa ending in 1111 ★ Your Default Expires: 10/2025	10/1/2024	Edit Delete History

10. The **"Manage Saved Payment Methods"** link will open a new page. As shown to the left, it will list any credit / debit cards or bank accounts that were saved to the customer's account. They can **add a new credit / debit card or bank account**, as well as edit or delete any existing saved payment methods.

View Invoices

Make a Payment

View Policies

Manage Saved Payment Methods

Manage Scheduled Payments

Pay As You Go Reporting

Minimum Due

\$0.00

Due Date

-

Account Balance

\$6,496.50

Last Payment

\$0.00

Paid

-

Policies

Policy Type	Policy Number	Effective Date	Expiration Date	Total Premium	Payment Plan	Status
Workers' Compensation	1061179122	10/28/2024	10/28/2025	\$25,826.00	PAY AS YOU GO MONTHLY	Active

11. The “**Manage Scheduled Payments**” link will open a new page. If they have previously set up any payments to be scheduled, the payments will be listed there.
12. The “**Pay As You Go Reporting**” link will only appear when the policy they are viewing is on that payment plan.

a. The customer will click the quick link for Pay as You Go, and the screen to the left is the screen the customer will see.

b. The set of numbers next to the report status is the report. The customer can click on it to access the Pay as You Go report.

c. You can also access Pay As You Go Reporting on the Policy Details page. This button will only be available in a commercial lines account.

Select a Report

Reports

Policy Type	Policy Number	Reporting Period	Report Available - Report Due	Report Status	
Workers' Compensation	1061179122	10/28/2024 - 11/30/2024	10/28/2024 - 12/15/2024	Available	Start Report
General Liability	1061177934	11/01/2025 - 11/30/2025	10/25/2024 - 12/15/2025	Submitted	1061177737
Workers' Compensation	1061179122	12/01/2024 - 12/31/2024	01/01/2025 - 01/15/2025	Planned	
Workers' Compensation	1061179122	01/01/2025 - 01/31/2025	02/01/2025 - 02/15/2025	Planned	
Workers' Compensation	1061179122	02/01/2025 - 02/28/2025	03/01/2025 - 03/15/2025	Planned	

13. The “**Pay As You Go Reporting**” link will bring the customer to the “**Select a Report**” page when they can begin the reporting and paying process.