



Navigator Overview

Personal Lines

1. To register for Navigator, the customer will begin by clicking on the “Customer Login” link in the upper right corner of our website. The customer should make sure the “I am a Customer” button is selected before choosing “Sign up”.

2. The customer will then be prompted to enter a policy number and zip code.

3. The customer will then enter an email address and name. On the next prompt screen, the customer will enter a password for their account.

4. Next, the system will guide the customer through email and phone number verification before they can accept the terms and conditions. They will move through each page to complete the registration.



ACCOUNTS + ADD ACCOUNT

Account #: A106199984

[VIEW POLICIES](#)

- Finally, the customer will see the page as shown to the left. If they are an existing customer and have used MyAccount, there will be a section specific to that account. For new customers or existing customers who have not used MyAccount, they should look for the section that shows an account number that starts with the letter "A". Then they can choose "View Policies", and that will bring them into Navigator.

Account Summary (A106120097)

Policies

Account Name	Policy Type	Policy #	Effective Date	Expiration Date	Total Premium	Payment Plan	Status
BTEST RIA	Signature Home	1061130147	10/10/2024	10/10/2025	\$1,861.96	Monthly P/L - 12 months	Active Documents
BTEST RIA	Select Personal Auto	1061130148	4/10/2025	4/10/2026	\$118.00	Full Pay	Active Documents
BTEST RIA	Signature Personal Auto	1061130150	3/10/2024	3/10/2025	\$228.00	Monthly P/L - 6 months	Active Documents ID Cards

My Quick Links

- Billing & Payment
- File a Claim

Account Summary

- On the "Home" Page of Navigator, there are a few ways for the customer to maneuver. They can choose anything under "My Quick Links" to quickly hop into those sections.
- They can also click on the "Policy #" hyperlink to view the details of their specific policy.

Policy Details: 1061172992 - Active

Current

Details		Premium	
Policy Effective 10/15/2024	Policy Expiration 04/15/2025	Policy Type Personal Auto	Total Premium \$118.00
			Taxes and Fees \$0.00
Policy Address 315 Roosevelt Rd, Pella, IA, Pella, IA 50219			Total Cost \$118.00

Policy Details

- On the "Policy Details" page, the customer can see the effective date, agency, and premium. There is also a "Print" icon they can use to print everything on this page.

Coverages

Liability - Bodily Injury	Bodily Injury Liability	\$100,000/\$300,000
Liability - Property Damage	Property Damage Liability	\$100,000
Medical Payments	Medical Limit	\$5,000
Pet Injury Coverage	Liability Limit	\$900
Underinsured Motorists Coverage Split	Underinsured Motorists BI Limits Split	\$25,000/\$50,000
Uninsured Motorists Coverage Split	Uninsured Motorists - BI Limits - Split	\$25,000/\$50,000

- The next section will show all the coverages on the policy. This example is for an auto policy, so the customer will see their auto coverages.

Vehicles

Year	Make	Model	VIN Number
2011	MINI	ML350	4JGB85GR2BA714020

[Show Vehicle Coverages](#)

Total Premium: \$118.00

Covered Drivers

Name	License	Date of Birth
BTEST RIA	m048826382737	02/02/1992

- The customer will see the "Vehicles" section next which will list all vehicles covered by the policy. They can choose the "Show Vehicle Coverages" button to view the specific coverages.
- The "Covered Drivers" section is below that in which all drivers covered by the policy will be listed.

Policy Documents					
Document Link	Document Name	Description	Type	Uploaded	
BLSBNOIC_Notice of Intent to Cancel_20240601124627.pdf	Notice of Intent to Cancel	Notice		Jun 3, 2024	
New Business Policy_2061130750_20240410154047.pdf	New Business Policy	Policy/Declaration		Apr 20, 2024	
PPCN0232_Personal Auto Declarations_NB_20240410154047.pdf	Personal Auto Declarations	Policy/Declaration		Apr 20, 2024	
PPM00038_Vehicle Identification Card_20240912160405.pdf	Vehicle Identification Card	ID Card		Sep 12, 2024	
PPM00038_Vehicle Identification Card_20240410154048.pdf	Vehicle Identification Card	ID Card		Apr 20, 2024	

Uploaded Documents					

Policy Contacts					
Name	License	Date of Birth	Email	Phone Number	Address
BTTEST BUS	m643026382737	02/02/1992	-	2012209011	315 Roosevelt Rd, Pelita, IA, Pelita, IA 502219

5. The last few sections are the “**Policy Documents**” and “**Policy Contacts**” sections. They will be able to view all internally generated documents here, including NOIC’s and vehicle ID cards. They will also be able to upload any documents by choosing “**Upload File**”.

Are you sure you want to upload?

Please note that once uploaded, the document cannot be deleted.
Would you like to continue?

Cancel **Yes**

6. After choosing “Upload File”, the customer will see the pop-up shown to the side telling them any documents uploaded cannot be deleted. They can choose “Yes” to continue.

Upload Document

Document Type Please Select

Upload Document

Drag and drop a file here

Upload file

Cancel **Save**

7. Then they will need to choose a “**Document Type**” using the dropdown menu and choose “**Upload File**” to select a file from their device. Then they can choose “**Save**”.

My Quick Links

- Billing & Payment
- Pay As You Go Reporting
- Manage Delivery Method**
- File a Claim

Changing Print Preference

1. If the customer has print / mail as their print preference, they will have an option to switch to electronic delivery. To switch, they should choose the “**Manage Delivery Method**” hyperlink under “**My Quick Links**”.
- **Please note this option is only available if the customer has print as their preference. This link will **not** appear if they**

Delivery Method ← → Edit

If you would like to update this delivery email, please click the Edit button above.

Account Documents

Print/Mail Delivery

Delivery Method

If you would like to update this delivery email, please click the Edit button above.

Account Documents

Print/Mail Delivery

Electronic/Portal Delivery

Email

sophia.schmidt@wnins.com

Email Verified

No

Do you agree to the Terms & Conditions?
(Click the link to view and agree.)

Pay As You Go Email (All documents will be sent electronically.)

Email For General Liability 1061177014 and Workers' Compensation 1061179122

Cancel Save

168022, A106135169,

My Quick Links

- Billing & Payment
- Pay As You Go Reporting
- File a Claim

EP Emily PolicyContact
wninstest1+A106179545@gm...

Account

Logout

Please contact your agent to update account details.

Delivery Method ✓ Click here to edit your delivery method

Account Documents

Electronic/Portal Delivery

Email

sophia.schmidt@wnins.com

Email Verified

No

Do you agree to the Terms & Conditions?
(Click the link to view and agree.)

are already on electronic preference.

- At the bottom of the screen is the **"Delivery Method"**. The current delivery method is shown as **"Print/Mail Delivery"**.

To change this, they can choose **"Edit"**.

- The customer should then select **"Electronic/Portal Delivery"** and enter an email address to receive all documents. Then they should agree to the terms and

conditions and choose **"Save."**

- If the customer wants to change their print preference back to Print/Mail Delivery, they will need to click on their profile

icon in the top right corner.

- Then the customer should choose **"Account"** to open the

Account Details page.

- The customer can scroll down and choose the **"Click here to edit your delivery method"** link and change the print preference back to **"Print/Mail Delivery"**.