



Phone: 1-800-442-7050

Email: RobinM@policy-pal.com

## How to view an account:

Click on Accounts at the top right of the screen. You can locate all the accounts you have currently being funded by Policy Pal by clicking Find Accounts at the lower left hand of the screen

1. Enter the insured's account number, **or** their policy number, **or** their name
2. Click Find Account at the bottom of the screen
3. You can quickly identify the accounts that are facing cancellation by clicking on Reports, then selecting the Agent Pending Cancellations report