

Changing Proposal Payment Method



This guide provides a straightforward process for updating your proposal's payment method from credit card to ACH. With clear, step-by-step instructions, it ensures a seamless transition, helping you manage your billing preferences effectively. Whether you're switching to ACH or back to credit card, this guide simplifies the task.

1

The payment method can be updated in the proposal. Please note that the current method listed under the Billing Information section is Credit Card, but we would like to switch to ACH.

Proposals >

P000085130 - Client3, *TEST

Edit Proposal

Send DocuSign

Initial Payment Required: To proceed with binding this proposal, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.

Bind cannot occur while Pending Subjectivities exist.

✓ Successfully set rule(s) to bypass.

Policy Detail

Account:

Client3, *TEST

Account Type:

NREIG

Rating Program:

Origami v1.0

Proposal Number:

P000085130

Effective Date:

07/29/2025

Expiry Date:

07/29/2026

Status:

Submitted

Type:

Application

Agency and Agent Information

Agency:

National Real Estate Insurance Group LLC Dba Re

Agent:

Woodl, Shawn

Client Service Advisor (CSA):

Jeromey Bell

Commission Profile:

NREIG 0%

Commission Percentage:

0.00

AMP Fee Rate:

0.00

Referral Percentage:

0.00

Pay Online

Pay Online

Send Payment Link

Billing Information

Pay In Full:

No

Payment Method:

Credit Card

Billing Level:

Account Bill

Billing Account:

Client3, *TEST

Rating Totals

+ Annual Premium:

1,860.00

+ Account Setup Fee:

50.00

Location Fees:

60.00

Technology Fees:

130.20

Additional Fees:

0.00

Reporting Fees:

0.00

AMP Fees:

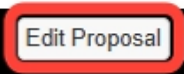
0.00

Referral Fees:

0.00

2

To update the payment method, click the Edit Proposal button at the top of the proposal page.



Send DocuSign

, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.


Bind cannot occur while Pending Subjectivities exist.

Agency and Agent Information

Agency:	National Real Estate Insurance Group LLC Db
Agent:	Woodl, Shawn
Client Service Advisor (CSA)	Jeromey Bell
Commission Profile:	NREIG 0%
Commission Percentage:	0.00

3

On the next screen, select ACH under the Rating Payment Method section, then click Save Changes in the top-right corner to proceed.



P000085114 - Client, *TEST

This Agency is not valid. Please review the information and try again or contact your administrator.

Initial Payment Required: To proceed with binding this proposal, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.

Bind cannot occur while Pending Subjectivities exist.

Ensure the Rating Payment Method and Payment Type are aligned. If the method has changed, save and re-rate the proposal prior to making the payment.

Rating Payment Method : *

ACH Credit Card

Payment Type

☒ Pay by Credit Card

☐ Pay by Bank Account

Charge Amount 134.62

☒ Save Payment Information ⓘ

Pay Online

Policy Detail

Description: Client, *TEST, 25-26

Account: Client, *TEST

Proposal Number: * P000085114

Effective Date: * 07/25/2025

Expiry Date: * 07/25/2026

Underwriter:

Billing Level: Account Bill

Billing Account: Client, *TEST

Agency and Agent Information

Commission Profile1: 15% New / 15% Renewal

Commission Basis: - None Selected -

Agent: Langston, Patrick

Regional Agency Manager (RAM): Dave Pinter

AMP:

Referral Agent:

4

Click the Run Rating Calculations button. Once the process is complete, the payment method in the Billing Information section will update to show ACH.

Please note: the same steps apply when switching the payment method from ACH to Credit Card.

Proposals > **P000085114 - Client, *TEST** Edit Proposal View Proposal Doc **Run Rating Calculations** Reject Proposal More ▾

This Agency is not valid. Please review the information and try again or contact your administrator.

Bind cannot occur while Pending Subjectivities exist.

✓ Save Successful.

Policy Detail

Account:	Client, *TEST
Account Type:	REInsurePro
Rating Program:	Origami v1.0
Proposal Number:	P000085114
Effective Date:	07/25/2025
Expiry Date:	07/25/2026
Status:	Submitted
Type:	Application

Agency and Agent Information

Agency:	Goosehead Insurance Agency, LLC
Agent:	Langston, Patrick
Regional Agency Manager (RAM)	Dave Pinter
Commission Profile:	15% New / 15% Renewal
Commission Percentage:	15.00
AMP Fee Rate:	0.00
Referral Percentage:	0.00

Billing Information

Pay In Full:	No
Payment Method:	ACH
Billing Level:	Account Bill
Billing Account:	Client, *TEST
Billing Frequency:	Monthly

Rating Totals

+ Annual Premium:	755.00
+ Account Setup Fee:	50.00
Location Fees:	60.00
Technology Fees:	0.00
Additional Fees:	30.20