

# 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.

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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.

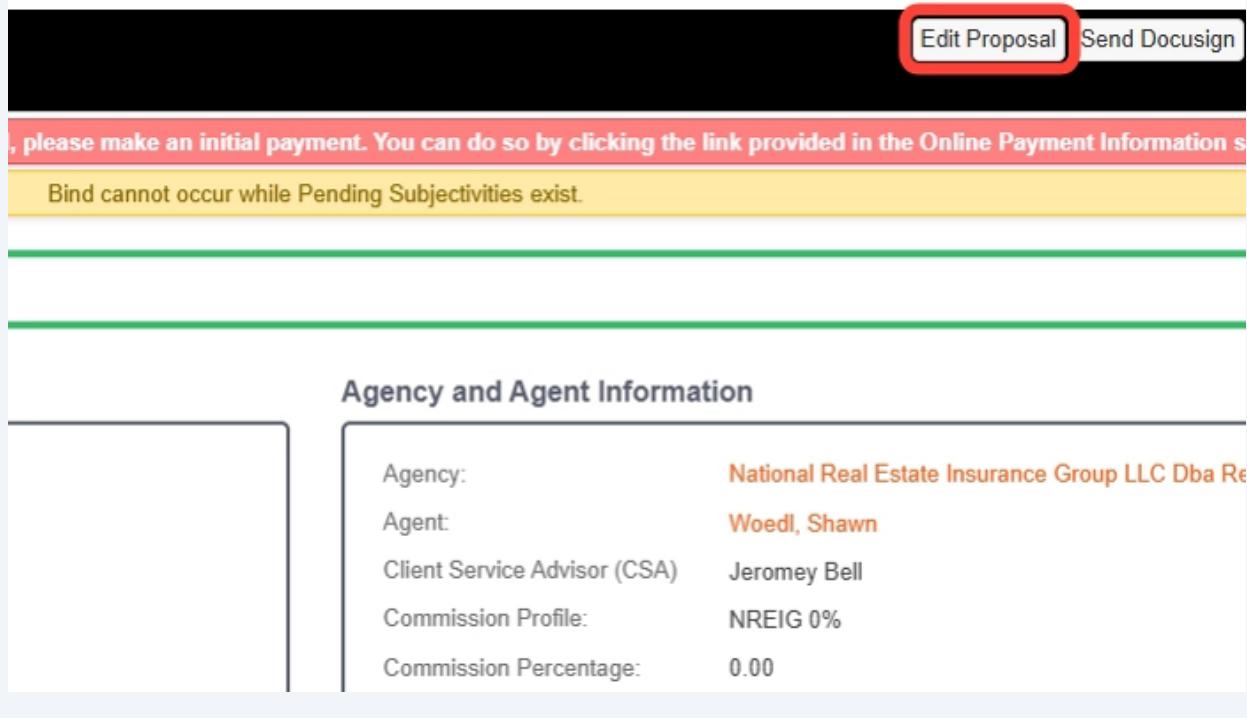
Proposals > P000085130 - Client3, \*TEST Edit Proposal Send DocuSign

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.

<strong>Policy Detail</strong>	<strong>Agency and Agent Information</strong>
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: National Real Estate Insurance Group LLC Dba RE Agent: Woedl, Shawn Client Service Advisor (CSA): Jeremy Bell Commission Profile: NREIG 0% Commission Percentage: 0.00 AMP Fee Rate: 0.00 Referral Percentage: 0.00
<strong>Pay Online</strong>	<strong>Rating Totals</strong>
<a href="#">Pay Online</a> <a href="#">Send Payment Link</a>	+ 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
<strong>Billing Information</strong>	
Pay In Full: No Payment Method: Credit Card (highlighted) Billing Level: Account Bill Billing Account: Client3, *TEST	

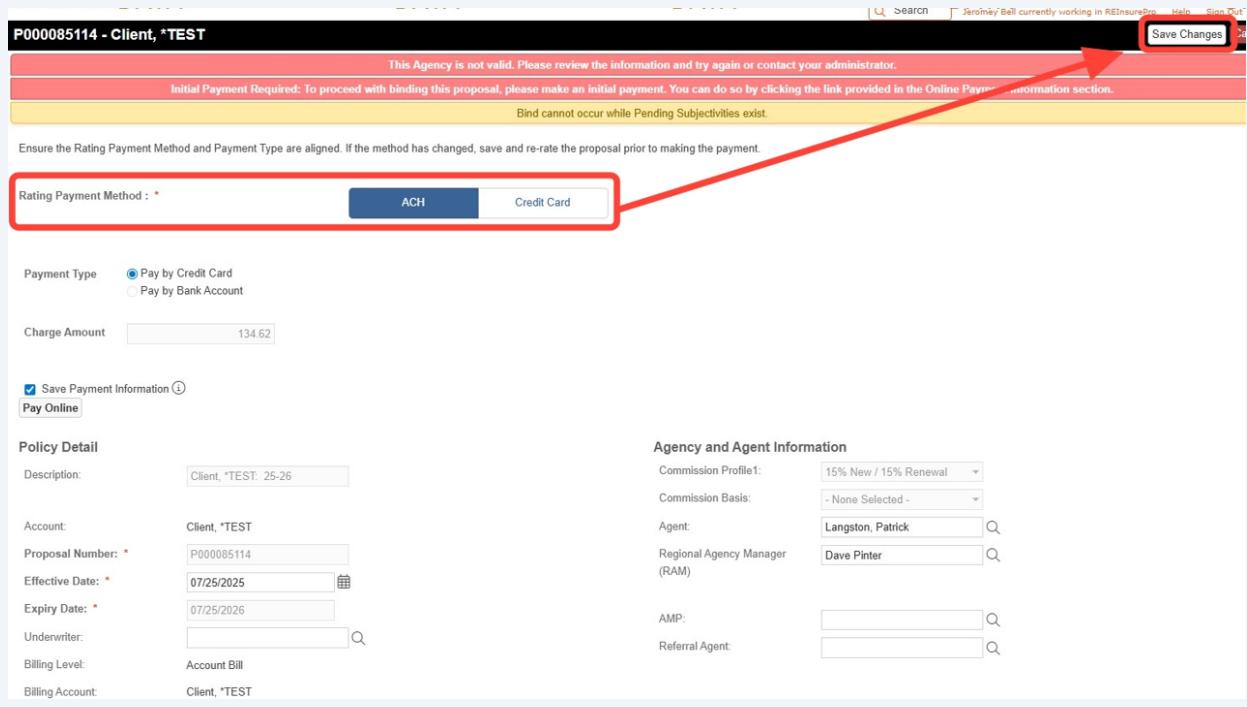
2 To update the payment method, click the Edit Proposal button at the top of the proposal page.



The screenshot shows the 'Agency and Agent Information' section of a proposal page. At the top, there are two buttons: 'Edit Proposal' (highlighted with a red box) and 'Send Docusign'. Below these, a red banner states: '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.' A yellow banner below it says: 'Bind cannot occur while Pending Subjectivities exist.' The main content area displays agency and agent details:

Agency:	National Real Estate Insurance Group LLC Dba Re
Agent:	Woedl, 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.

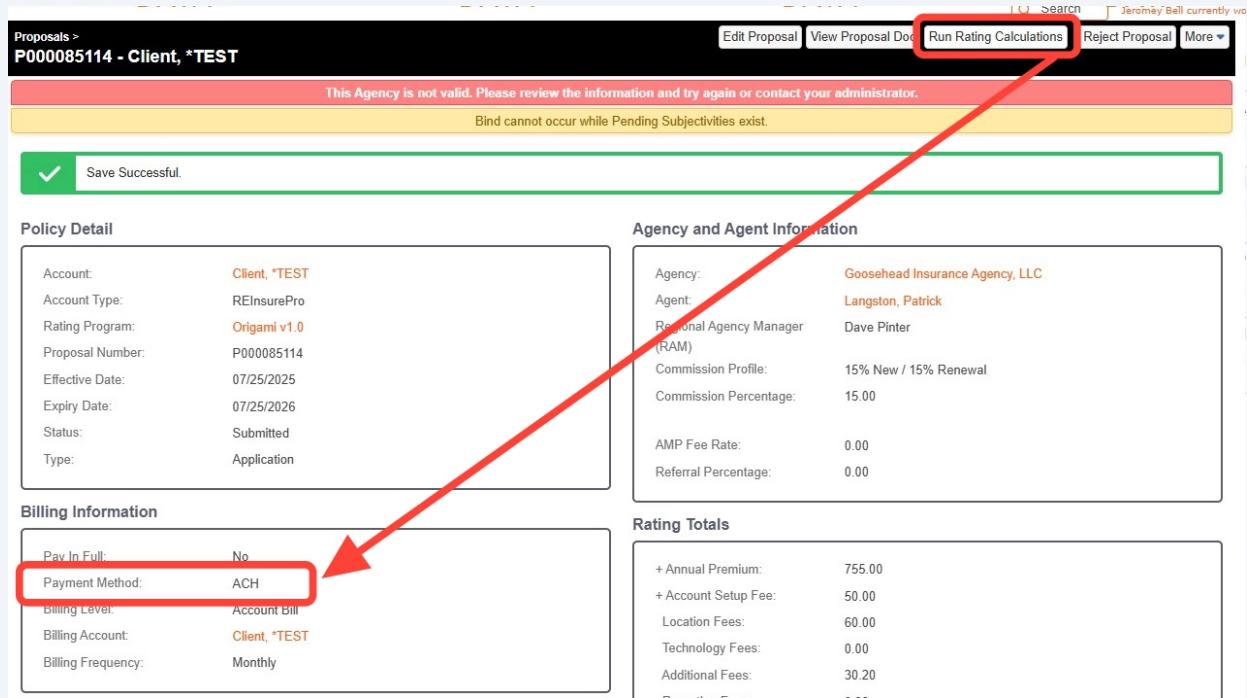


The screenshot shows the 'Rating Payment Method' section of a proposal page. At the top, a red banner says: 'This Agency is not valid. Please review the information and try again or contact your administrator.' Below it, another red banner says: 'Initial Payment Required: To proceed with binding this proposal, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.' A yellow banner below it says: 'Bind cannot occur while Pending Subjectivities exist.' The 'Rating Payment Method' section has three buttons: 'Pay by Credit Card' (highlighted with a red box), 'ACH' (highlighted with a red box), and 'Credit Card'. A red arrow points from the 'ACH' button to the 'Save Changes' button in the top-right corner. The 'Save Changes' button is highlighted with a red box. The page also includes sections for 'Policy Detail' and 'Agency and Agent Information'.

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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.



The screenshot shows a software interface for managing proposals. At the top, there are buttons for 'Edit Proposal', 'View Proposal Document', 'Run Rating Calculations' (which is highlighted with a red box and an arrow), 'Reject Proposal', and 'More'. A message bar at the top indicates that the agency is not valid and suggests reviewing the information or contacting the administrator. Below this, a green success message box says 'Save Successful'. The interface is divided into several sections: 'Policy Detail', 'Agency and Agent Information', 'Billing Information', and 'Rating Totals'. The 'Billing Information' section is highlighted with a red box and an arrow, specifically pointing to the 'Payment Method' field which is set to 'ACH'. Other fields in this section include 'Pay In Full' (No), 'Billing Level' (Account Bill), 'Billing Account' (Client, \*TEST), and 'Billing Frequency' (Monthly). The 'Rating Totals' section shows various fees and premiums.

Policy Detail	Agency and Agent Information
Account: Client, *TEST	Agency: Goosehead Insurance Agency, LLC
Account Type: REInsurePro	Agent: Langston, Patrick
Rating Program: Origami v1.0	Regional Agency Manager (RAM): Dave Pinter
Proposal Number: P000085114	Commission Profile: 15% New / 15% Renewal
Effective Date: 07/25/2025	Commission Percentage: 15.00
Expiry Date: 07/25/2026	AMP Fee Rate: 0.00
Status: Submitted	Referral Percentage: 0.00
Type: Application	

Billing Information		Rating Totals	
Pay In Full:	No	+ Annual Premium:	755.00
Payment Method:	ACH	+ Account Setup Fee:	50.00
Billing Level:	Account Bill	Location Fees:	60.00
Billing Account:	Client, *TEST	Technology Fees:	0.00
Billing Frequency:	Monthly	Additional Fees:	30.20
		Grand Total:	875.20