

Making Proposal Changes



This guide provides step-by-step instructions for efficiently updating proposals.

1

To make changes to the proposal, within the Proposal, scroll down to the Location Schedules section and click the Location Number.

Location Schedules

Location Number	BillingLevel	BillingFrequency	Payment Option	Add Date	Street1	City	Code	Postal Code
<u>0078559-0001</u>	Account Bill	Monthly	Insured Monthly		1234 Black Cherry Dr	Rockford	IL	61108

1 Records

> All Coverages

> Liability Coverage Listing

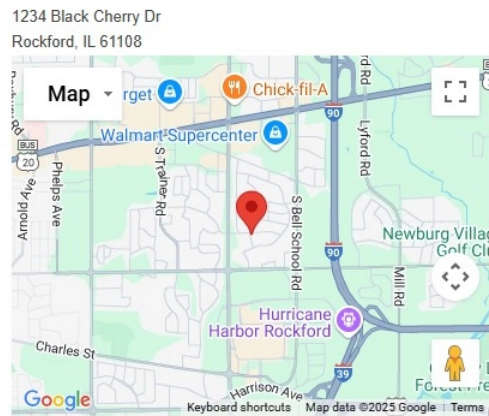
2

Click 'Edit Location Schedule' to access the editable fields. On the next screen, make any necessary updates—for example, you might change the Coverage Form from Special to Basic, or adjust the Deductible from \$2,500 to \$5,000. When you're finished, click 'Save Changes' to continue.

General Information

Account: CSA21, Training
 Proposal: P000080495 - P000080495 - CSA21, Training: 25-26
 Effective Date: 06/26/2025
 Expiry Date: 06/26/2026
 Primary Page: No
 BillingLevel: Account Bill
 Payment Option: Insured Monthly

Address Information



County: Winnebago
 Address Verified? ☒

Premium / Cost Information

Annual Cost: 2,250.00
 Monthly Cost ⓘ: 187.97

Rating Info

Schedule: 0078559-0001 - 1234 Black Cherry Dr

Save Changes More

Number of Stories: * 1.0

Year Electric: - None Se

Year Plumbing: - None Se

Year HVAC: - None Se

Property Coverage

* Yes

Coverage Form (Cause) * Basic

Note: Basic coverage does not include Water or Theft Coverage.

[Click HERE to see the full list of covered perils.](#)

Named Windstorm: * Included

Ordinance or Law ⓘ ☐

Deductible (AOP) * 5,000

Valuation Type: * RCV

Building Limit: * 300,000.00

Loss of Rents Limit: * 0.00

Contents Limit: * 0.00

Other Structure Limits: * 0.00

Total Value: 300,000.00

Total Sq Ft: 1,676

3

Click the 'Proposal' link, then on the following screen, open the 'More' dropdown menu. Scroll down to the 'Ratings' section and select 'Run Rating Calculations'.



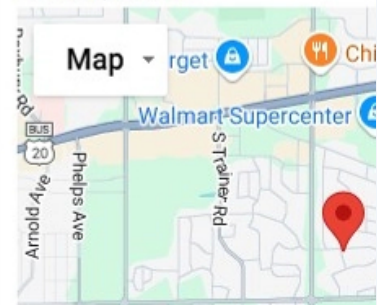
Save Successful.

General Information

Account: [CSA21, Training](#)
Proposal: [P000080495 - P000080495 - CSA21, Training: 25-26](#)
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Primary Page: No
BillingLevel: Account Bill
Payment Option: Insured Monthly

Address Information

1234 Black Cherry Dr
Rockford, IL 61108



Search

Jeromey Bell currently working in REInsu

Edit Proposal

View Proposal Doc

Reject Proposal

More ▾

Open Ta

Proposal Crea

ment. You can do so by clicking the link provided in the Online

All Note

Bypass Note

OK

Jeromey I

Agent Information

National Real Estate Insurance Group LLC
DBA REInsurePro
Woodl, Shawn

Recent Em

No emails. C

+ Total Fees:
 + Surplus Lines Tax:
 + Total State Fees ⓘ
 + Transaction/CC Fee
 = Total Cost:

Export

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Rating

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[Run Rating Calculations](#)

[View Server Logs](#)

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4

Once Rating Calculations are complete, look for the UW Exception Management button. If you do not have this button then move to next step. Click into the button. If nothing is there then click Bypass and then move to next step. If you have UW exceptions listed then this means that the location is being reviewed by Underwriting and your RAM will email you when review is completed.

Search Samantha Walsh currently working i

Edit Proposal **UW Exception Management** Reject Proposal More ▾

Tran
Detail
Prem
Fees
Surpl
Acco
Instal
Total
v O
Prodc

um	Annual Cost	Prorated Cost	Cost Monthly
	0.00		0.00
	0.00		0.00

5

You can now see the "View Proposal Doc" and "Send DocuSign" buttons. Click "View Proposal Doc", wait 1-2 mins, refresh page and the Proposal will generate in the Files section. Click "Send DocuSign" when client is ready to proceed.

The screenshot displays the REInsurePro web interface. At the top, a navigation bar includes a search icon, the user's name 'Jeromey Bell', and links for 'Help' and 'Sign Out'. Below this, a black action bar contains buttons for 'Edit Proposal', 'Send DocuSign', 'View Proposal Doc', 'Reject Proposal', and a 'More' dropdown. The 'Send DocuSign' and 'View Proposal Doc' buttons are highlighted with a red rectangle. A red banner below the buttons states: 'please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.' Below this is a green-bordered box. The main content area is divided into two sections. On the left, 'Agency and Agent Information' is displayed in a table. On the right, there are sections for 'Transaction Premium Change', 'Open Tasks', 'All Notes', and 'Recent Emails'.

Agency and Agent Information	
Agency:	National Real Estate Insurance Group LLC DBA REInsurePro
Agent:	Woedl, Shawn
Client Service Advisor (CSA)	Jeromey Bell
Commission Profile:	15% New / 15% Renewal
Commission Percentage:	15.00
AMP Fee Rate:	0.00
Referral Percentage:	0.00

Transaction Premium Change	
Premium	1,529.60
Fees	396.51
Surplus Lines Tax	2.54
Account Setup Fee	50.00
Installment Fees	6.32
Total Cost	1,984.97

Open Tasks New All Tasks
Proposal Created - P000080495 ✓

All Notes New All Notes
Bypass Notes for UW Rule: License IL
OK
Jeromey Bell on 06/25/2025

Recent Emails
No emails. Click [here](#) to add one.