

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	Billing Level	Billing Frequency	Payment Option	Add Date	Street 1	City	Code Postal Code
0078559-0001	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.

Proposals > P000080495 - CSA21, Training > Location Schedules >
Schedule: 0078559-0001 - 1234 Black Cherry Dr

Search | Jeremy Bell currently w
[Edit Location Schedule](#) More ▾

General Information

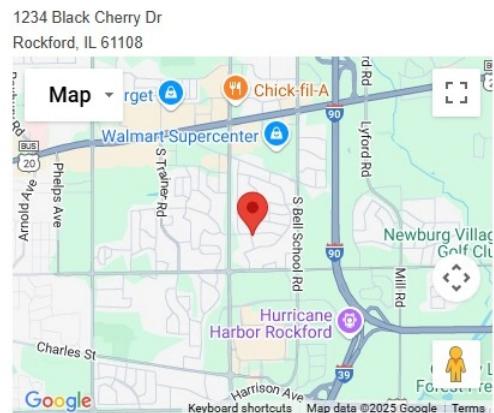
Account:	CSA21, Training
Proposal:	P000080495 - P000080495 - CSA21, Training: 25-26
Effective Date:	06/26/2025
Expiry Date:	06/26/2026
Primary Page:	No
BillingLevel:	Account Bill
Payment Option:	Insured Monthly

Premium / Cost Information

Annual Cost:	2,250.00
Monthly Cost ⓘ	187.97

Rating Info

Address Information



County: Winnebago
 Address Verified?

Schedule: 0078559-0001 - 1234 Black Cherry Dr

[Save Changes](#) More ▾

Number of Stories: *

Year Electric:

Year Plumbing:

Year HVAC:

Property Coverage

* Yes

Coverage Form (Cause) *

Note: Basic coverage does not include Water or Theft Coverage.
[Click HERE to see the full list of covered perils.](#)

Named Windstorm: *

Ordinance or Law ⓘ

Deductible (AOP) *

Valuation Type: *

Building Limit: *

Loss of Rents Limit: *

Contents Limit: *

Other Structure Limits: *

Total Value:

Total Sq Ft:

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'.

Proposals > P000080495 - CSA21, Training > Location Schedules >
Schedule: 0078559-0001 - 1234 Black Cherry Dr



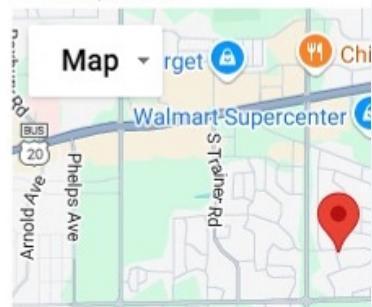
Save Successful.

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

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

Agent Information

National Real Estate Insurance Group LLC

DBA REInsurePro

Woedl, Shawn

▼ All Note

Bypass Note

OK

Jeromey I

Recent Em

No emails. C

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

Export

[View QR Code](#)

Rating

[View Last Rating Log](#)

[Run Rating Calculations](#)

[View Server Logs](#)

Reports

[Printable Abstract](#)

OFAC

[Search OFAC](#)

[View OFAC Activity](#)

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.

The screenshot shows a software interface with a navigation bar at the top. The bar includes buttons for 'Edit Proposal', 'UW Exception Management' (which is highlighted with a red box), 'Reject Proposal', and 'More'. To the right of the bar, there is a status message: 'Samantha Walsh currently working'. Below the bar is a yellow header bar. The main content area contains a table with two rows of data. The table has four columns: 'Annual Cost', 'Prorated Cost', 'Cost Monthly', and 'Total'. The first row shows '0.00' for all columns. The second row shows '0.00' for 'Annual Cost' and '0.00' for 'Cost Monthly', with 'Total' being '0.00'. The right side of the interface has several vertical labels: 'Trans', 'Detail', 'Prem', 'Fees', 'Surpl', 'Acco', 'Instal', 'Total', 'v O', and 'Propo'.

Annual Cost	Prorated Cost	Cost Monthly	Total
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.

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

Transaction Premium Change

Details

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

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

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

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