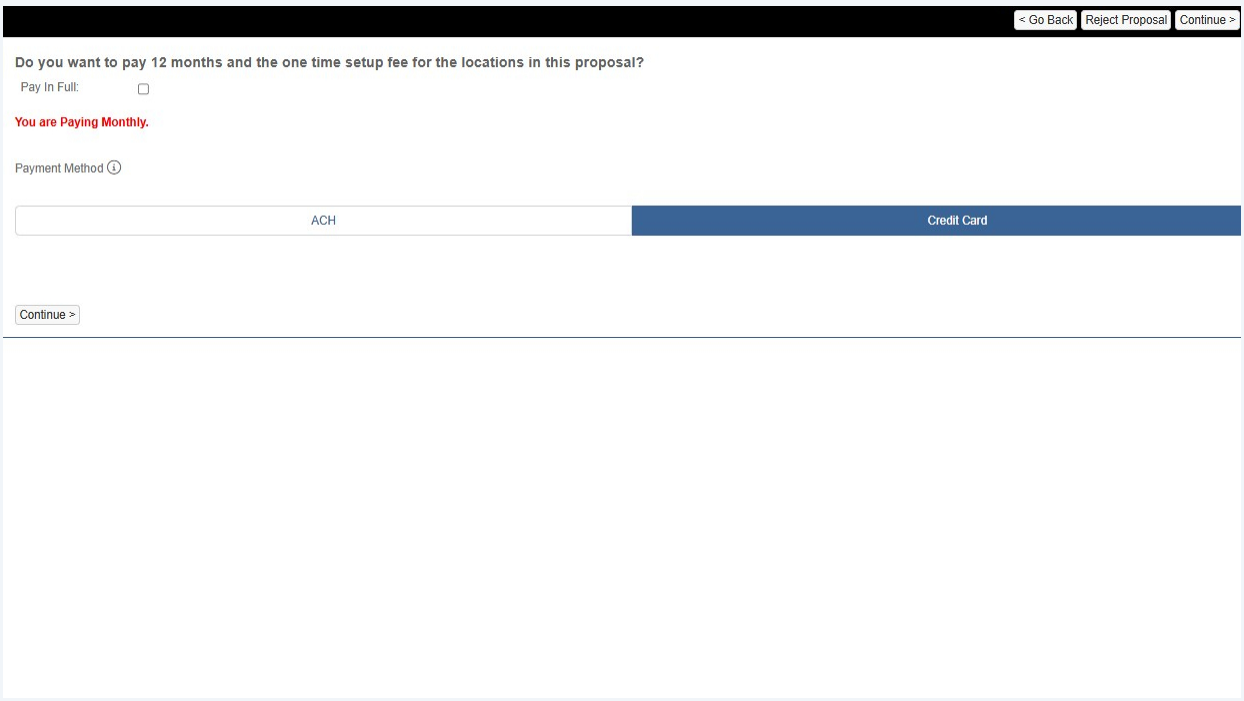
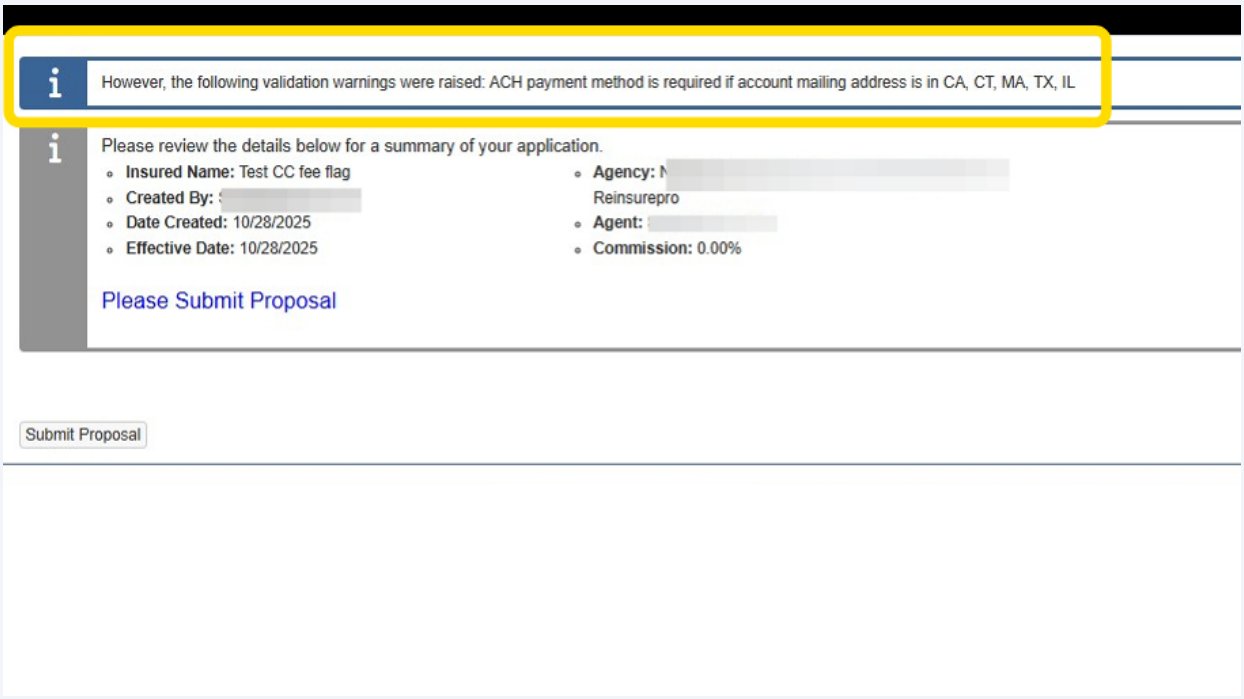
Mailing address in CA, CT, IL, MA or TX- ACH only

If you select the payment method "Credit Card" and the client's mailing address is in CA, CT, IL, MA or TX, there will be some warnings and exceptions that you will see guiding you to change the payment method to ACH to continue. Use the directions below to see the warnings/exceptions and how to clear them.

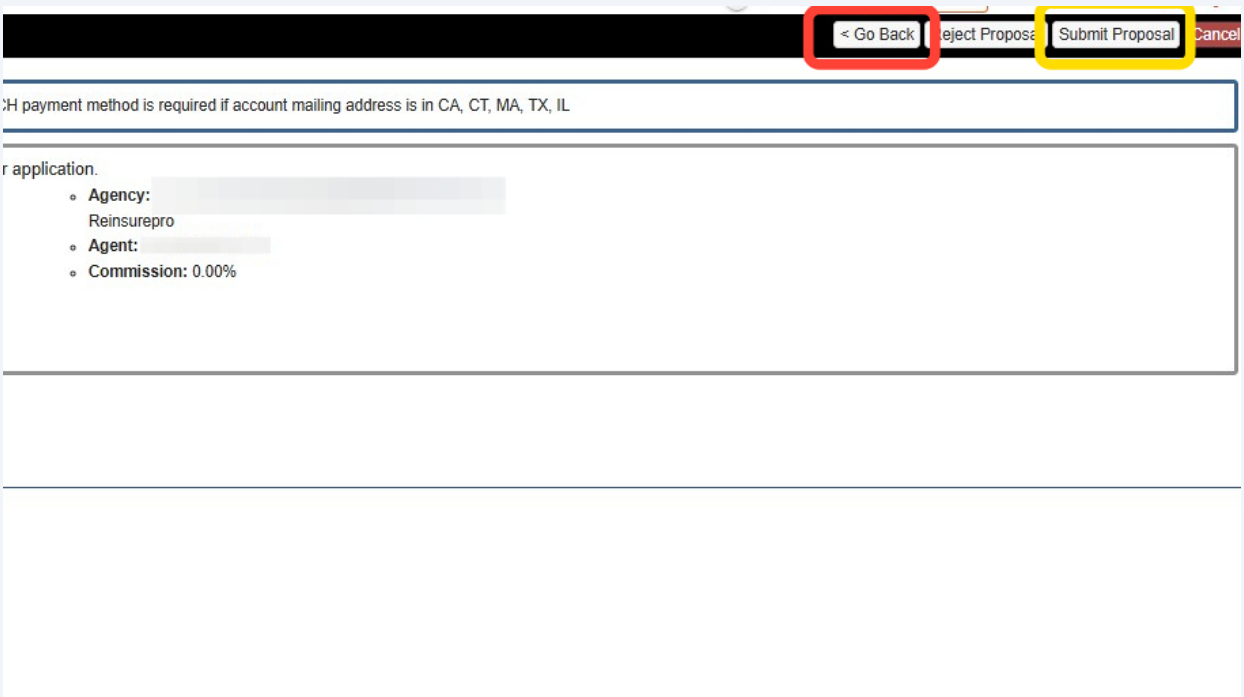
1 This client's mailing address is in CT and selected Credit Card for payment method.



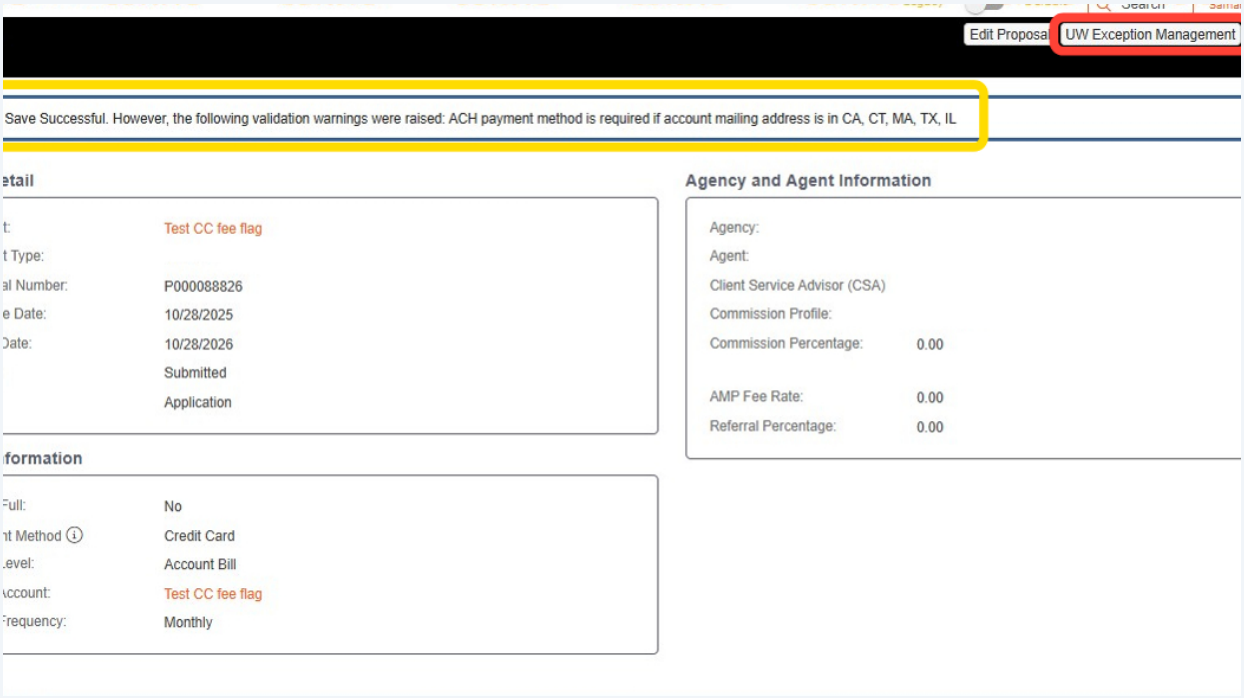
2 After clicking "Continue" you will notice on the next page there is a warning at the top that says "However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL"



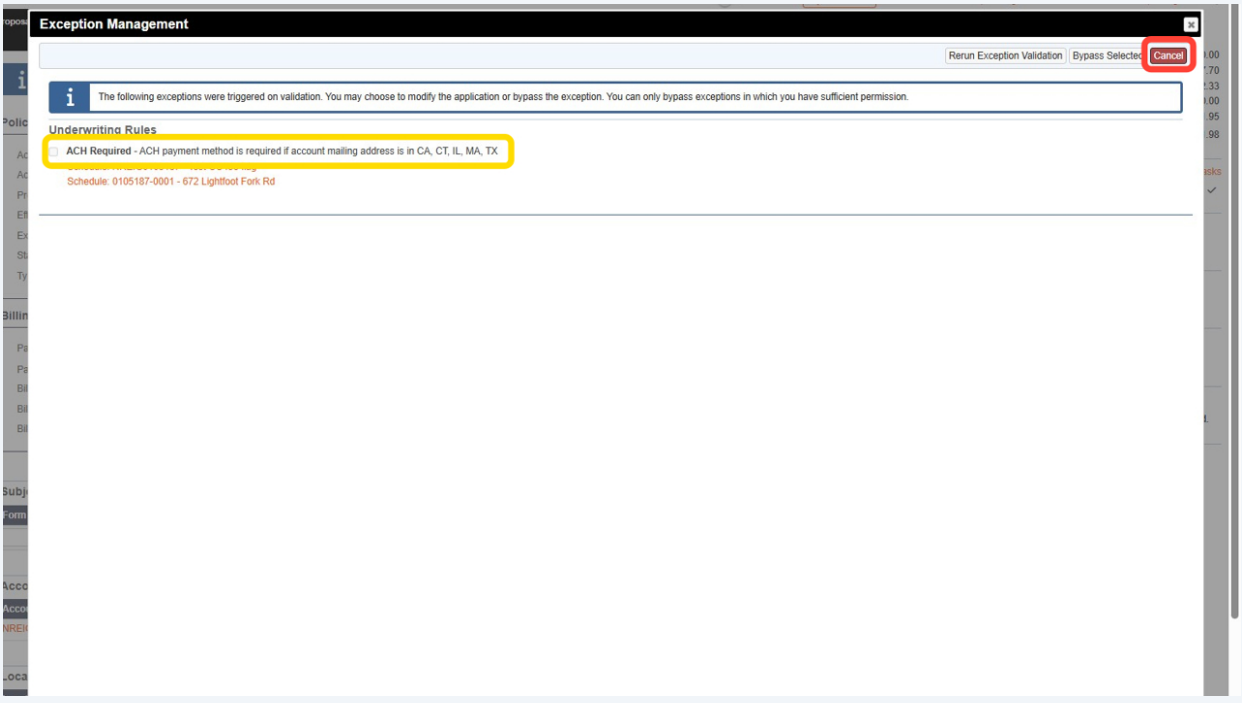
3 From here you can simply click "Go Back" and change the payment method to "ACH" and then continue and Submit Proposal. If you missed the message on this page and already clicked "Submit Proposal" then continue on for further directions.



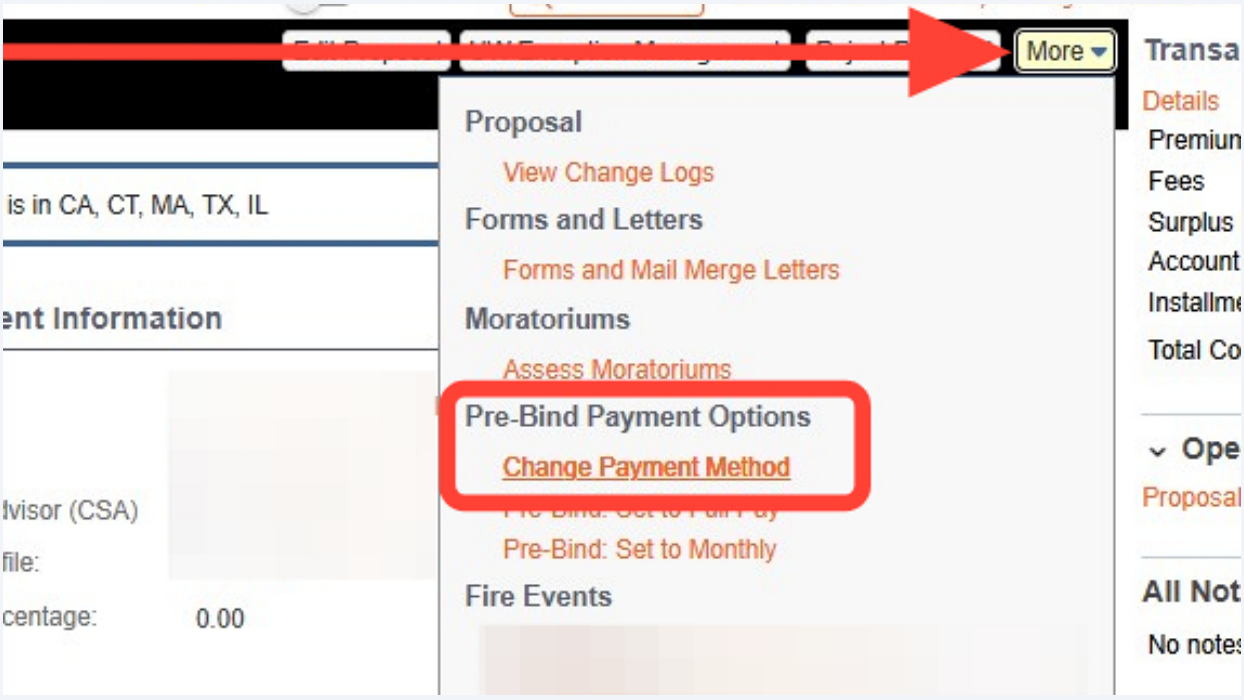
4 Once the Proposal has been Submitted, you will see the same warning message and there will be an UW Exception if the payment method was not changed. Click "UW Exception Management".



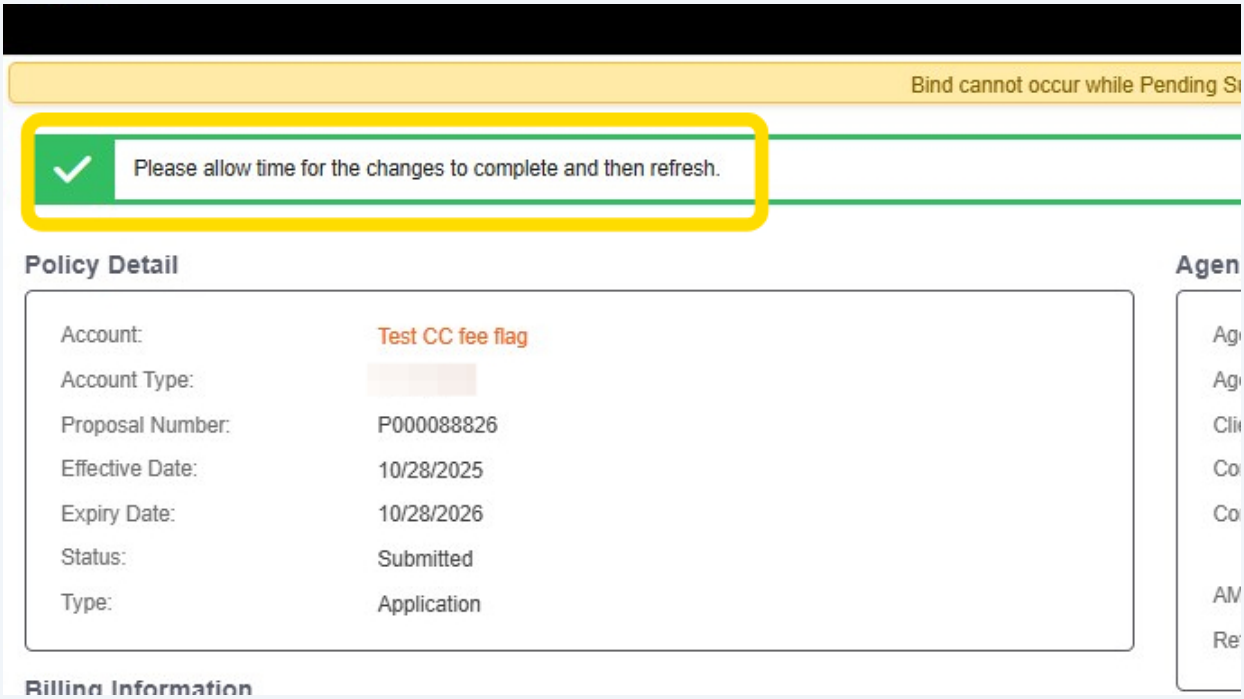
5 The UW exception will say "ACH Required - ACH payment method is required if account mailing address is in CA, CT, IL, MA, TX". Click Cancel to take you back to the Proposal to fix this issue.



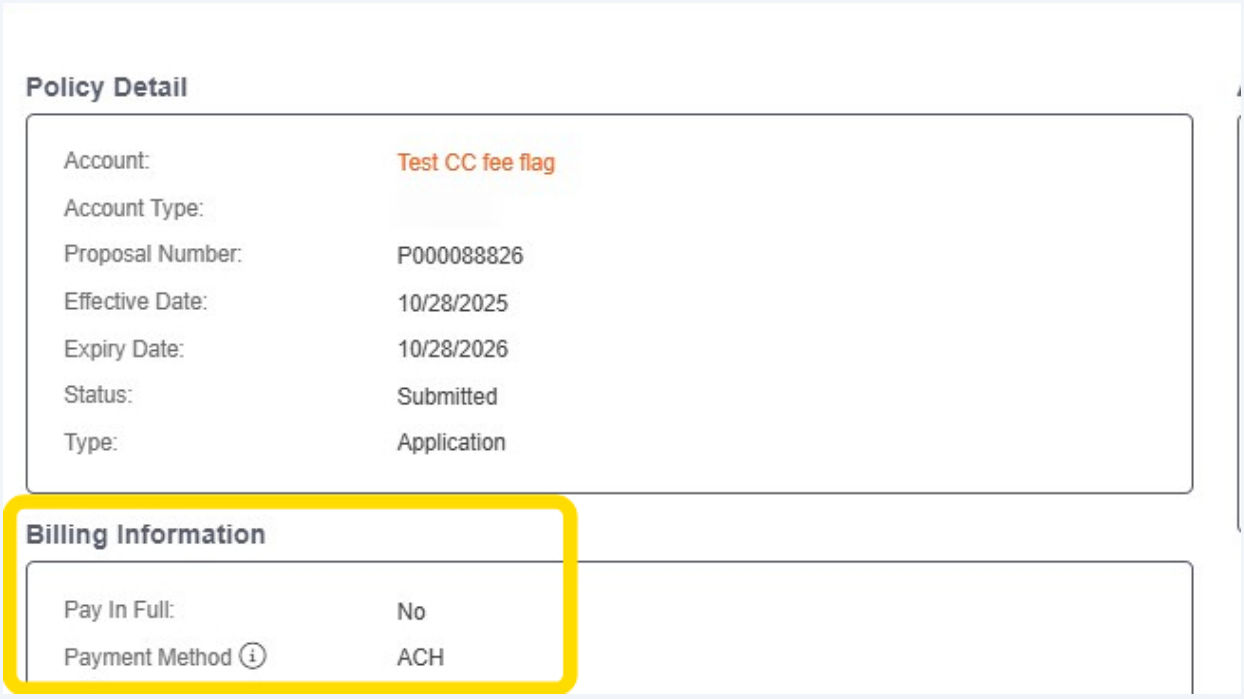
6 In the "More" dropdown menu, Click "Change Payment Method". This will prompt a pop box to ask, "Are you sure you want to fire this event?". Click "OK".



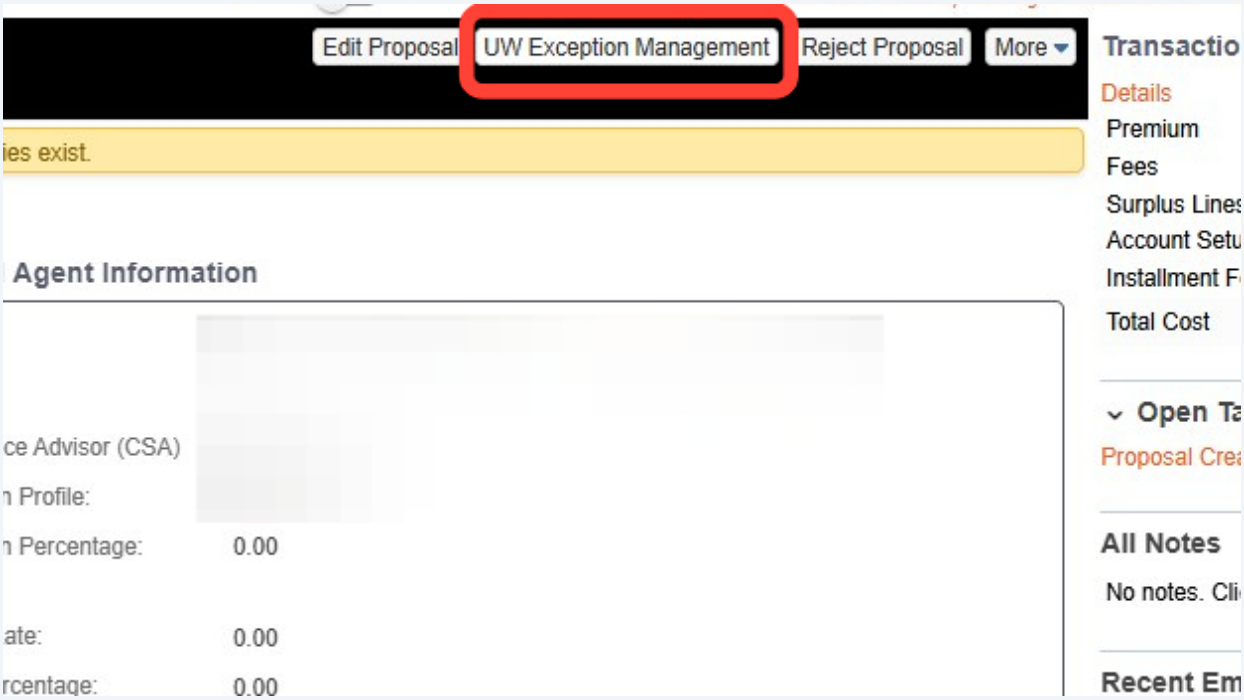
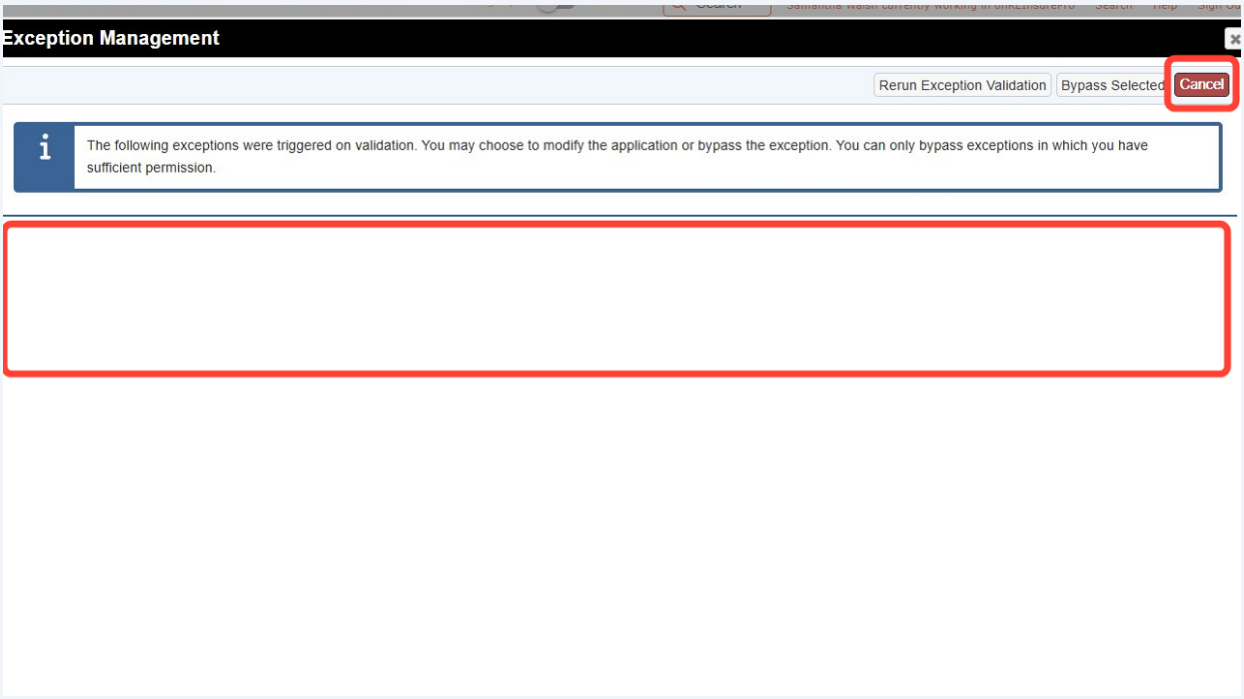
7 The system is now processing the request to change the Payment Method from Credit Card to ACH. Allow it 30 seconds at least to process and then refresh your screen.



8 Once you refresh, you are looking for the "Payment Method" section to now show "ACH" instead of "Credit Card".



9 To clear the UW exception now, Click "UW Exception Management"



10 The exception should now be gone, if no other exceptions, click "Cancel", refresh your screen and proceed with proposal. If there were more exceptions, please review those and make any necessary fixes or wait for notification of UW's decision.