

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.

< Go Back

Reject Proposal

Continue >

Do you want to pay 12 months and the one time setup fee for the locations in this proposal?

Pay In Full: ☐

You are Paying Monthly.

Payment Method ⓘ

ACH

Credit Card

Continue >

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"



However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL



Please review the details below for a summary of your application.

- Insured Name: Test CC fee flag
- Created By: [REDACTED]
- Date Created: 10/28/2025
- Effective Date: 10/28/2025
- Agency: [REDACTED]
Reinsurepro
- Agent: [REDACTED]
- Commission: 0.00%

Please Submit Proposal

Submit Proposal

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.

< Go Back

Reject Proposal

Submit Proposal

Cancel

ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL

Review application.

- Agency: [REDACTED]
Reinsurepro
- Agent: [REDACTED]
- Commission: 0.00%

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".

Save Successful. However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL

Detail

t: Test CC fee flag

t Type:

al Number: P000088826

e Date: 10/28/2025

Date: 10/28/2026

Submitted

Application

Agency and Agent Information

Agency:

Agent:

Client Service Advisor (CSA)

Commission Profile:

Commission Percentage: 0.00

AMP Fee Rate: 0.00

Referral Percentage: 0.00

formation

Full: No

t Method i Credit Card

Level: Account Bill

Account: Test CC fee flag

Frequency: Monthly

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.

Exception Management

i The following exceptions were triggered on validation. You may choose to modify the application or bypass the exception. You can only bypass exceptions in which you have sufficient permission.

Underwriting Rules

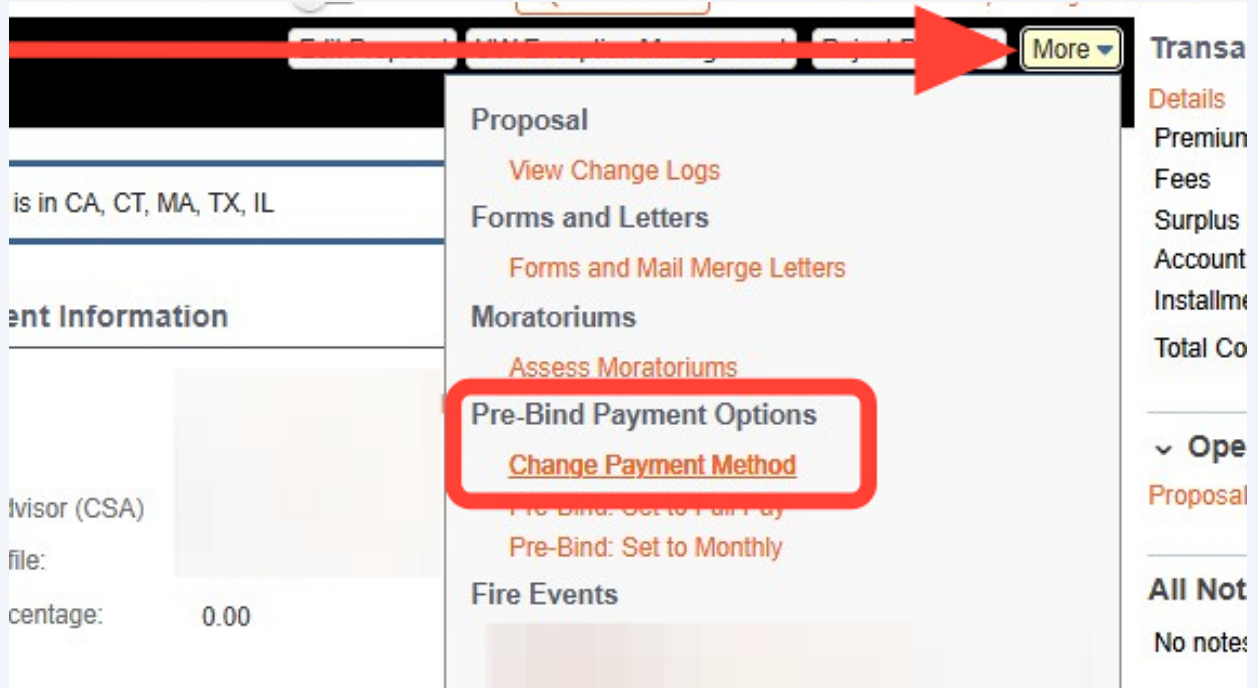
☐ ACH Required - ACH payment method is required if account mailing address is in CA, CT, IL, MA, TX

Schedule: 0105187-0001 - 672 Lightfoot Fork Rd

Cancel

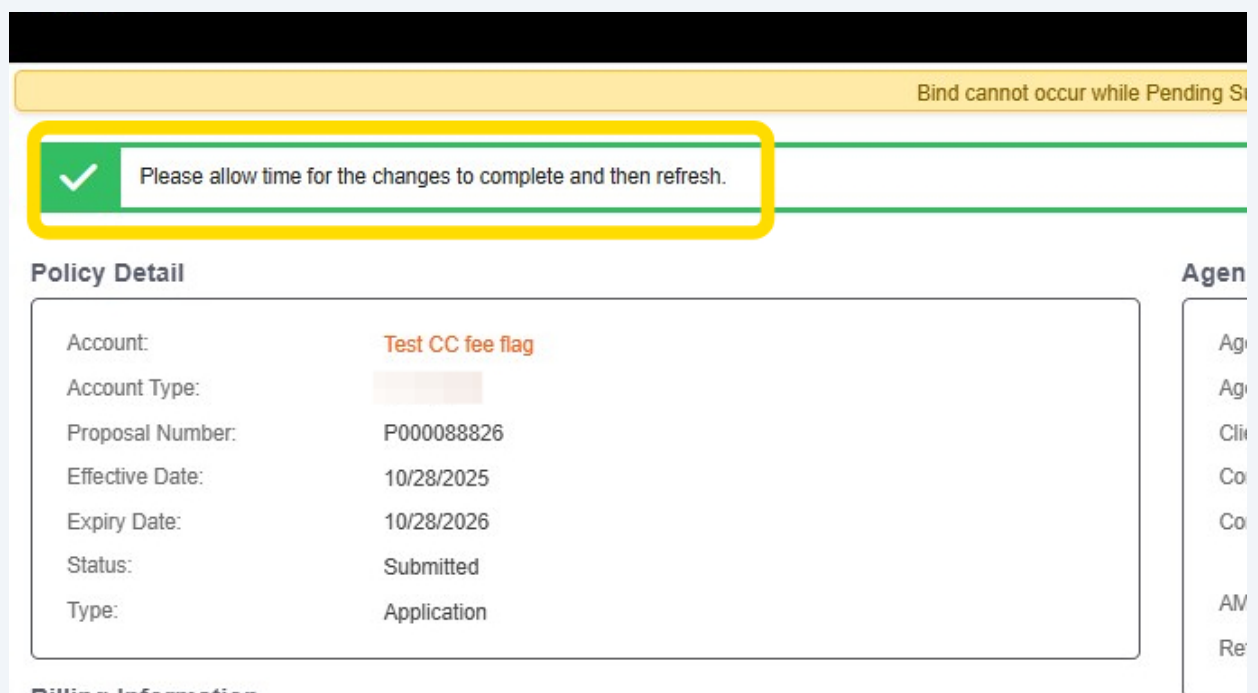
6

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".

Policy Detail

Account:	Test CC fee flag
Account Type:	
Proposal Number:	P000088826
Effective Date:	10/28/2025
Expiry Date:	10/28/2026
Status:	Submitted
Type:	Application

Billing Information

Pay In Full:	No
Payment Method ⓘ	ACH

9

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

Edit Proposal UW Exception Management Reject Proposal More ▾

ies exist.

Agent Information

ce Advisor (CSA)	
n Profile:	
n Percentage:	0.00
ate:	0.00
rcentage:	0.00

Transaction

Details

- Premium
- Fees
- Surplus Lines
- Account Setu
- Installment F
- Total Cost

▼ Open Ta

Proposal Crea

All Notes

No notes. Cli

Recent Em

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.

Exception Management

Rerun Exception Validation Bypass Selected **Cancel**

i The following exceptions were triggered on validation. You may choose to modify the application or bypass the exception. You can only bypass exceptions in which you have sufficient permission.