

# *iSupplier Portal* Claims Procedure Manual



# **PROGRESSIVE**<sup>°</sup>

# **Claims Procedure Manual**

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# Overview

# **Introduction**

Progressive is introducing payments via Electronic Funds Transfer (EFT) to Claims-related suppliers. EFT payments are payments that are electronically deposited into the bank account of your choice rather than Progressive sending you a check in the mail. iSupplier will be the tool you utilize to manage your bank account. It also provides additional information regarding your invoices and payments for reconcilement purposes, if you desire utilizing iSupplier for that purpose.

# What is iSupplier?

Supplier is a self-service, web based application that can be accessed through a secure interface with Progressive. iSupplier will allow you to add and manage your bank account information with Progressive. It also provides payment remittance information. iSupplier will be the primary way that you will be able to answer the following questions:

- What bank account do I have set up with Progressive to receive electronic payments?
- When was I paid?
- What was I paid for?
- How much was I paid?
- What was the payment number?
- Who from my company has access to iSupplier?



# **General Information**

The intent of this manual is to act as a desk top assistant or user guide for the iSupplier application.

Any questions can be directed to the Progressive iSupplier Support Team by phone or email.

Hours of Operation: Monday through Friday, 8:00am - 5:30pm EST.

External Phone Number: 1-877-616-7473

Fax Number: 440-603-5560

By E-mail: <a href="mailto:isuppliersupport@progressive.com">isuppliersupport@progressive.com</a>

The iSupplier System is available 24/7. The system will prompt you to change your password every 120 days.

Address:

Progressive Casualty Insurance Company Attention: Supplier Maintenance PO Box 94505 Cleveland, OH 44101

The following information is available at <a href="http://progressive.com/Suppliers/Suppliers.aspx">http://progressive.com/Suppliers/Suppliers.aspx</a>

- iSupplier Claims FAQ
- iSupplier Claims Procedure Manual
- iSupplier Claims Add/Delete User Form
- Form W9 Request for Taxpayer Identification Number
- EFT Request Form



# **Navigation Tips**

The following information will assist you while navigating through iSupplier.

#### **Back Button**



Do not use the Back button on your browser. This can cause errors in the application.

#### lcons

An asterisk {\*} prior to a field name indicates that the field is required and must be populated with the information requested.

Bank Account		
	 * Account Number	

The pencil icon allows you to make field updates.

Update
1

Click on the calendar icon to select a date.

Start Date	End Date		
26-Feb-2013			

The magnifying glass icon allows you to search a field for a list of values. If you know the field value, begin typing it and click the tab key. The field will populate. If you do not know the value, click the magnifying glass icon. The Search and Select screen will populate. Click Go for the list of values. Click Quick Select to populate the value in the field.



[%] Use the percent sign % to perform a search with incomplete information.

Example: To search for Jim Smith, type either: Jim% or %Smith. We refer to this functionality as a Wildcard search.



# Login to iSupplier

You will receive an e-mail from Progressive that contains the URL to iSupplier, containing the subject line: FYI: Progressive Insurance Supplier Collaboration Network: Confirmation of Registration.

1. Click on the log on link within the email.

Workflow Mailer EBSQ04 <\$ystem_WRKF_Notifications@Progressive.com> Chone number: NA 04/24/0013 03:03 EM	To         STEVEN TYLER <steven@yahoo.com>           cc        </steven@yahoo.com>						
Please respond to System_WRKF_Notifications@ Progressive.com	Subject FYI: Progressive Insurance Supplier Collaboration Network: Confirmation of Registration						
Time Zone (GMT -05:00/-04:00) Eastern Time							
To STEVEN TY	YLER						
ID 121409629	<b>↓</b>						
You have been registered at Progressive Insurance for access to the Supplier Self Service Network. You can log on to <a href="https://suppliersqa.progressive.com:443/oa">https://suppliersqa.progressive.com:443/oa</a> servlets/oracle.apps.fnd.sso.AppsLogin with the username STEVEN@YAHOO.COM and the password Zb1#3F.							
When you first log on, you will be required to change your part contact our <u>administrator</u> or call the support staff at 1-877-616-747	assword for security purposes. If you have any further questions or require additional information please 73						
Thank you							

\*Note: If you no longer have the email, you can also log in at https://suppliers.progressive.com

2. Log on to iSupplier using the Username and temporary password provided to you in the Registration Notice sent via email.

1	*User	Ihenkel001
	Password	SUPPLIERS - Your Username can be found in your Confirmation of Registration email. For assistance, please call Financial Operations Support Desk at 877-616-7473. Progressive EMPLOYEES/CONTRACTORS - Please use your TPX ID. For assistance, please call the IT Help Desk at 1-888-746-4500.
		SUPPLIERS - If this is your initial login, your temporary password is in your Registration email. Progressive EMPLOYEES/CONTRACTORS - Your temporary password is your employee ID For assistance. call the IT Help Dark at 1-658-746-4500.
		Login Cancel

- 3. You will be immediately prompted to change your password.
- 4. Enter the temporary password.
- Enter a new password.
   NOTE: Passwords must be at least 5 characters long and will expire every 120 days.
- 6. Re-enter the new password and click Apply.



# iSupplier Homepage

You are now at your iSupplier Home Page.

PR	OGK	ess/	IVE"	iSupplier Portal				-
					A	Navigator 🔻	🚱 Favorites 🔻	Home Logout Personalize Page
Home	Orders	Admin	Finance					
Need help	o? Send an Notific	email to IS	upplierSupp	ort@progressive.com or cal the Suppler Support Team at :	-877-616-7473.	Full List	Payments <ul> <li>Payments</li> </ul>	
Sub	ject				Date			
Nor	esults four	id.						
About this	Page	Privacy St	atement	Home Orders Admin Fina	nce Home Logou	t Personalize	Page	Copyright (c) 2008. Oracle. All rights reserved.

# **Notifications**

Notifications are a way of communicating information to you. Notifications will be available to view in iSupplier when changes are made that impact your supplier account (Bank Account Change Completed, Address Changes, etc). In addition to these notifications you will also receive an e-mail notification with this same information.

The Notifications view on the Home tab will display your five most recent Notifications. The full list of Notifications can be viewed by clicking Full List.

1. To view the notification, click the Subject hyperlink.

# **Homepage Links**

Documents or information can be accessed from the tabs across the top left or from the navigation menu to the right of the Home Page for Payments. Click on the hyperlink to access specific information on Payments.

PROGRESSIVE	iSupplier Portal			-
		🉃 Navigator 🔻 🗌	😼 Favorites 🔻 🛛 Ho	me Logout Personalize Page
Home Orders Admin Finance	<b></b>			
Need help? Send an email to iSupplerSupp	ort@progressive.com or cal the ISuppler Support Team a	at 1-877-616-7473. Full List	Payments • Payments	/
Subject		Date		
No results found.	Home Orders Admin F	inance Home Logout Personalize P	age	
About this Page Privacy Statement				Copyright (c) 2006, Oracle. All rights reserved.



## Actions by Tab

From the **Home Tab**, the following actions can occur:

- View and search for Payments
- View Notifications

From the Orders Tab, the following actions can occur:

• View and manage deliverables

From the Admin Tab, the following information is available:

- Only available to user with Claims ISP Manager Responsibility.
- View, add or update the following information: Address Book, Contact Directory, Business Classifications, Products & Services, Bank Accounts & User Accounts.

From the **Finance Tab** the following actions can occur:

- View and search invoices
- View and search payments

# **View Supplier Details**

1. Click on the Admin tab.



This view will produce your Supplier name as listed in our system, your Progressive Supplier Number and your Taxpayer ID.

General

Organization Name MY AUTO SHOP Supplier Number 529603 Taxpayer ID 342256756



# Address Book

1. Click on the Admin tab.



The system will display all addresses assigned to your account.

Address Book							
Site Name A	Address Details	Country	Update	Remove			
6550 FORD AVE	6550 FORD AVE OCALA, FL	United States	1	Î			
987678 CHEVY CI	987678 CHEVY CIRCLE MARICOPA, AZ	United States	1	Î			

# Add/Remove Address

All requests for address additions must be in a written format and emailed to the following address: <u>iSuppliersupport@progressive.com</u>.

The following information is required:

- Name of Supplier
- Progressive Supplier Number
- New Address, City, State, Zip
- Contact Name and Telephone Number
- Effective Date
- Reason for addition

Once the request is approved by Progressive, the new address will be processed within iSupplier. A confirmation will be sent to you when completed.



# **Change/Correct Address**

For a change or a correction to your address, such as adding a Suite number or a PO Box number, etc., follow the steps below:

## 1. Click on the Admin tab.



3. Click on the Update icon next to the address you want to change/correct.

ddress Book							
Address Details	Country	Update	Remove				
6550 FORD AVE OCALA, FL	United States		Î				
987678 CHEVY CIRCLE MARICOPA, AZ	United States	1	î				
	Address Details 6550 FORD AVE OCALA, FL 987678 CHEVY CIRCLE MARICOPA, AZ	Address Details     Country       6550 FORD AVE     United States       OCALA, FL     987678 CHEVY CIRCLE       MARICOPA, AZ     United States	Address Details     Country     Update       6550 FORD AVE     United States     /       OCALA, FL     987678 CHEVY CIRCLE     United States     /       MARICOPA, AZ     /     /				

4. Make the necessary changes to your Address. In the Note field, document any comments that are applicable. Click on the Save button.

Update Address						
Si Ste Name Country * Address Line 1 Address Line 2 Address Line 3 Address Line 4 * Ctty/Town/Localty State/Region	uppler Name 6550 FORD AVE United States 5550 FORD AVE STE 125 0 0 0 0 CALA FL		Suppler Number Fax Area Code Fax Number	]	Cancel	Save
Postal Code     Phone Area Code     Phone Number     Note						
Note		1	N			
Note Please ac	ld Suite #125 to my address.					
Include any a when change	iddtonal details about the address such as ng address information.	the type of address. This will be visit	ole to other buyers within your organization	as well as to the supplier. Also, include brief note	s to buyer about the	change

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6. You will receive	a confirmation email once the ch	nange has been approved/pr	ocessed by	Progressive.			
Confirmation Details for your address have been modified.							
Address Book							
Site Name 🔺	Address Details	Country	Update	Remove			
6550 FORD AVE	6550 FORD AVE STE 125 OCALA, FL 44124	United States	1	Î			
987678 CHEVY CI	987678 CHEVY CIRCLE MARICOPA, AZ	United States	J	Î			

# **Contact Directory**

The iSupplier application allows Suppliers to provide Contact information to Progressive via the iSupplier portal.

If you choose to include this information in the application, it will be submitted to Progressive's Supplier Maintenance group for approval. Once approved, this information will be a permanent part of your Supplier record with Progressive until it is changed or updated by you, the Supplier.

## 1. Click on the Admin tab.



2. Click on the Contact Directory link.



3. The system will display all Contacts listed on your Supplier Account. Actual iSupplier Users are noted on your account by having a ☑ in the User Account field, otherwise the person listed is just a contact on your account and will not have access to iSupplier under any responsibility.

Contact Directory : Active Contacts								
Create								
First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
Sue	Donatelli	440-603-5818	sdonatel@progressive.com	Current	~	Î		1
ANNE	GRCITZER	216 663-8181		Current		<b>i</b>		<i>&gt;</i>
LISA	HENKEL		LHENKEL@ALT.COM	Current	~	<b>I</b>		2
Karen	Katona		KMKTEST@YAHOO.COM	Current	~	Î		1

**NOTE:** To add an iSupplier User to your account an Add/Delete User from must be completed by the person with the correct authority and then submitted to Progressive for processing and approval. (see "Add/Delete User" process steps for more information)

## Add/Delete User

To add or remove a user's access from iSupplier, you must complete a request form. An electronic copy of this form is available at <u>www.progressive.com/Suppliers/Suppliers.aspx</u>.

**Note:** The request must be submitted by an Authorized User with the "Claims ISP Manager" responsibility in iSupplier. If the Authorized User is no longer employed, the Owner of the company must complete the form. The Owner may request that the additional user be added with either of the below responsibilities:

#### Claims ISP Manager - View & Edit Bank Account/User Contact Info

- Manage bank account information
- Search/view payment information

#### **Claims ISP Inquiry - View Only:**

• Search/view payment information

The completed form must be mailed or faxed back to Progressive.

Return by mail: Progressive Casualty Insurance Company Attention: Supplier Maintenance PO Box 94505 Cleveland, OH 44101

Fax: 440-603-5560

If you have any questions contact the iSupplier Support Line at 877-616-7473 or send an email to <u>isuppliersupport@progressive.com</u>.

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# Sample Add/Delete User Form

	Progressive Ad	ld/Delete User Form for	ISupplier	
Instructions: This I Manager responsit	form must be filled out and sig bility. If the Authorized User is	ned by an Authorized User already no longer employed, the owner of	on the account the company r	t with the Claims ISP nust complete the form.
Submit the form us 1. Email to:	ing one of the below options. isuppliersupport@progressiv	e.com		
2. Fax to:	440-603-5560, Attn: Supplier N	Maintenance		
3. Mail to:	Progressive Insurance Attn: Supplier Maintenance PO Box 94505			
	Cleveland, OH 44101			
	R	equestor Information		
Supplier Name:				
Ourseller Address:				
Supplier Address:	Street Address			Apartment/Unit #
	City		State	ZIP Code
Progressive				
Supplier #:		Tax ID#		
	A	dd User Information		
-				
Full Name:	First	Last		ML
Email Address:				
Phone:				
User Access:	Ciaims ISP Manager -	Manage Bank Account Informatio	on + View Pay	ment information
	Claims ISP inquiry - V	iew Payment Information Only	-	
User ID (Office				
Use Only):				
	De	lete User Information		
Full Name:				
	Last	First		M.L.
Delete Dete:				
Delete Date:				
Delete Date:	Auth	orized User Information		
Authorized User	Auth	orized User Information		
Authorized User Name:	Auth	orized User Information		
Authorized User Name: Authorized User Signature	Auth	orized User Information Title: Date:		
Authorized User Name: Authorized User Signature	Auth	orized User Information Title: Date:		
Authorized User Name: Authorized User Signature	Auth	orized User Information Title: Date:		
Authorized User Name: Authorized User Signature	Auth	orized User Information Title: Date:		



# **Business Classifications**

The iSupplier application allows Suppliers to provide their Business Classification information to Progressive via the iSupplier portal. Inclusion of this information is strictly voluntary and not required by Progressive.

If you choose to include this information in the application, it will be submitted to our Supplier Maintenance group for approval. Once approved, this information will be a permanent part of your Supplier record with Progressive until it is changed or updated by you, the Supplier.

1. Click on the Admin tab.



2. Click on the Business Classifications link.



3. Enter your Business Classification, Certificate Number, Certifying Agency and Expiration date, if all are applicable. Next enable the certification statement, then click the Save button.

					Cancel Save
Certification					
✓ I certify that I have reviewed the classific	ation below and t	ney are current and accurate.			
Last Certified By					
✓ TIP Date format example: 26-Mar-2013					
Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Hub Zone					
Minority Owned		•			
Service-disabled Veteran Owned					
Small Business					
Veteran Owned	☑ 🧹			Self-certification	
Women Owned					
					Cancel Save



# **Products and Services**

The iSupplier application allows Suppliers to provide their Products and Services information to Progressive via the iSupplier portal. Inclusion of this information is strictly voluntary and not required by Progressive.

If you choose to include this information in the application, it will be submitted to our Supplier Maintenance group for approval. Once approved, this information will be a permanent part of your Supplier record with Progressive until it is changed or updated by you, the Supplier.

1. To start click on the Admin tab.



2. Click on the Products and Services link.



3. Click the Add button to review codes.

Products and Services								
Add	Add							
Select	Code	Products and Services	Date Added	Approval Status	View Sub-Category			
	No results found.							

4. Enable the Browse All Products & Services button or enable the Search for a Specific Product & Service.

Add Prod	ucts and Services: : (APPLIED LASER TECHNOLOGIES)		
-		Cance <u>l</u>	A <u>p</u> ply
Browse     Bro	e All Products & Services		
O Search	for Specific Product & Service		
	S Previ	ous 1-10 💌	Next 10 📀
Codo	Deducts and Semicor	View Sub-	Applicable
14111500	Products and Services	categories	
14111500	Printing and writing paper		
14111504	Tractor feed paper		Applicable
14111537	Label papers		Applicable
14111700	Personal paper products		Applicable
14111815	Tent cards		Applicable
14111821	Order form or order books		Applicable
14121800	Coated papers		C Applicable
14121806	Waxed paper		Applicable
14121808	Freezer paper		Applicable
24131501	Combined Refrigerator/Freezer		Applicable
1	© Previ	ous 1-10 💌	Next 10 📀

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## 5. Choose your Products and Services code(s) and then click Apply.

		View Sub-	
Code	Products and Services	Categories	Applicable
44102414	Self-inking stamp		Applicable
44103119	Heat transfer paper for copiers		Applicable
44111513	Supports for diaries or calendars		Applicable
44111522	2 Book holder		Applicable
44111804	Drafting papers		Applicable
44111808	I T squares		Applicable
44111909	Board cleaning kits or accessories		Applicable
44111912	/Whiteboard eraser		Applicable
44120000	Office supplies		Applicable
44121510	Mailing seals		Applicable
	© Previous 1	61-70	• Next 10 📀
		-	
		Cancel	Apply

6. You will receive a confirmation note that the Products and Services codes were added to your profile. Click the Return to Products and Services link.

	Confirmation						
The	The following Product and Service categories have been added to your profile.						
, 0	ffice supplies						
<u>Retu</u>	Irn to Products and Services						

#### 7. Your submission is now in a Pending Approval status.

Products and Services								
Remove Add	Remove Add							
Select All Select None	Select All Select None							
Select Code	Products and Services	Date Added	Approval Status	View Sub-Category				
44120000	Office supplies	10-Apr-2013	Pending Approval					

8. Once approved by Progressive's Supplier Maintenance group your submission will show in an Approved status.

Produc	ts and Services								
Ren	Remove Add								
Select /	Select All Select None								
Select	Code	Products and Services	Date Added	Approval Status	View Sub-Category				
	44120000	Office supplies	10-Apr-2013	Approved					



# Bank Account Setup (Electronic Funds Transfer (EFT))

Follow the steps below to enter and assign your bank account information. <u>To perform these steps you must</u> <u>have the "Claims ISP Manager" responsibility</u>, which allows for view/edit of bank accounts. **Note:** Bank Accounts should always be assigned to a specific payment address (aka site). If you need to add bank account information to multiple sites, this can be done using the "Adding Bank Account to Multiple Payment Addresses" process steps below.

# View Bank Account(s)



- Contact Directory
- Business
   Classifications
- Product & Services
- Banking Details
- 3. Choose All Assignments from the drop down list and then click Go.

	<u> </u>								
Banking Details View All Assignments  Go  Cancel Sa								Save	
TIP Date format example: 24-Apr-2013     Add Create									
Details Account Number	IBAN	Currency	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.									

#### 4. Click on the "Show" links to see a partial view of the bank account associated to each address.

3anking Details								
View All Assignments	View All Assignments Co							
Details Type 🔻	Name	Details					Assignments	
🛨 Show General	FLOWERS R US	General accounts use	ed at all supplier a	ddresses.			Ē	
+ Show Address	12345 DAISY CIR	12345 DAISY CIRCLE	,ROSE,OH,44345,	United States				
Hide Address	77878 TULIP RD	77878 TULIP RD,CAR	NATION, FL, 44356	,United States				
Account Number	Your Company Name	IBAN	Currency	Start Date	End Date	Priority		
<u>XXXX7566</u>			US Dollar	24-Apr-2013		1		



#### 5. Click on the Assignments icon to see a full view of the bank account associated to the address.

Banking Details								
View All Assignments 🔽 Go								
Details Type 🔻	Name	Details	Assignments					
<u> </u>	FLOWERS R US	General accounts used at all supplier addresses.	E					
<u>Show</u> Address	12345 DAISY CIR	12345 DAISY CIRCLE,ROSE,OH,44345,United States						
<u>Show</u> Address	77878 TULIP RD	77878 TULIP RD,CARNATION,FL,44356,United States						

## 6. Your bank account information will display along with the status.

Manage Bank Account Assignments												
Address Name 77878 TULIP RD Address Details 77878 TULIP RD,CARNATION,FL,44356,United States										Cance <u>l</u>	Save	
Add Create												
Details Account Number	IBAN	Currency	Bank Name	Start Date		End Date		Priority	Increase Priority	Decrease Priority	Status	Update
Hide XXXX7566		US Dollar	PNC	24-Apr-2013				1	$\bigcirc$	$\odot$	Approved	1
Your Company Name Routing Number 041000124 Assignment Status Priority and effectivity dates approv								Account Type Checking Branch Name 041000124				
				,		,						

Account Statuses:

- New: Bank Account submitted for approval to Progressive
- Approved: Bank Account approved for use by Progressive

# Enter a New Bank Account

#### What you need:

- Bank Routing Number (Note: Bank routing numbers are always 9 digits long and start with 0, 1, 2 or 3)
- Bank Account Number

In order to add your bank account to a specific address you must first determine if your routing number is already in use at Progressive. To do this:

## 1. Click on the Admin tab.

Home Orders	Admin Finance
2. Click on the Ba Profile Management	nking Details link.
<ul> <li>General</li> <li>Company Profile</li> <li>Address Book</li> <li>Contact Directory</li> <li>Business</li> <li>Classifications</li> <li>Product &amp; Services</li> <li>Banking Details</li> </ul>	

••• 17 3. <u>Important Step</u> - Choose "All Assignments" from the drop down View box, Click Go. This step will allow you to associate your bank account to individual payment addresses.

Banking Details									
View All Assignments GO									
Details	Type 🔻	Name	Details	Assignments					
⊕ <u>Show</u>	General	PIZZA PALACE	General accounts used at all supplier addresses.						
⊕ <u>Show</u>	Address	4545 MUSHROOM RD	4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States						
⊕ <u>Show</u>	Address	8989 PEPPERONI	8989 PEPPERONI ST, CHEESE, OH, 44555, United States	<b>E</b>					

#### 4. Find the address you want the banking information added to and click on the Assignments icon.

Banking Det	tails							
View All Assignments 🔽 Go								
Details Ty	rpe 🔻	Name	Details	Assignments				
<u> </u>	eneral	PIZZA PALACE	General accounts used at all supplier addresses.					
<u> → Show</u> Ad	ldress	4545 MUSHROOM RD	4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States					
<u> </u>	ldress	8989 PEPPERONI	8989 PEPPERONI ST, CHEESE, OH, 44555, United States					

## 5. Click on the Create button.

Manage Bank Account Assignments									
Address Name 4545 MUSHROOM RD Address Detais 4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States	nceļ <u>S</u> ave								
Add Create									
Details Account Number IBAN Currency Bank Name Start Date End Date Priority Increase Priority Decrease Priority Status	Update								
No results found.									

- 6. Select the "Existing Bank" radio button (should auto default as selected)
- 7. Type the first 6 digits of your Routing number in the Routing number field and stop.
  - a. After keying these first several digits, a list of pre-existing routing numbers will populate. If your routing # does not populate in this drop down, select the magnifying glass and do a search.
    - i. If the routing number is there to select, proceed to step 8.
    - ii. If the routing number is not found, select the "New Bank" radio button, and re-enter your routing number as new.

Ballk		Branch
C New Bank		O New Branch
Existing Bank		Existing Branch
* Routing Number 04	100012 🚽 🔍	* Confirm Routing Number 🔄 🚽 🔍
Show Bank Details	outing Number	BIC
<u>0</u> .	<u>4100012</u> 4	Branch Type ABA
C	🔍 ⓒ 1-1 ⊙	H Show Branch Details

#### 8. Enter your Routing Number again in the Confirm Routing Number field.

Bank	Branch
C New Bank	C New Branch
<ul> <li>Existing Bank</li> </ul>	Existing Branch
* Routing Number 041000124	* Confirm Routing Number 04100012
<u>Show Bank Details</u>	BIC Branch Name Branch Number Bank Mumber BIC Bran
	Branch Type ABA V 041000124 PNC 041000124
	Show Branch Details

#### 9. Enter your Bank Account Number in the Account Number field. Click on the Show Account Details link.

Bank Account	
* Account Number 987654	Currency US Dollar
IBAN	Account Status wew
Your Company Name	
Show Account Details	

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## 10. Enter your Account Name (Nickname) in the Account Name field.

11. Enter "Checking" or "Savings" in the Description field. Click the Save button.

Bank Account		
<ul> <li>Account Number IBAN</li> <li>✓TIP Le. College Account, Savings Account, Business Check</li> <li>○ <u>Hide Account Datais</u></li> <li>&gt;</li></ul>	987654 Curren Account Stat	y USDolar 💌 s New
Alternate Account Name Account Suffix Agency Location Code	Descriptio	Checking Please enter Checking or Savings (example: 26-Jun-2013)
Comments		
Note to Buyer	۲. ۲	
		Cance! Save

12. A confirmation notice will display noting the bank information has been added to your profile and is being routed for approval.

	-			
13.	Click on the	"Show"	hyperlink to view the details of the bank account y	ou just added.

Confirmation Bank account 997654, with the routing number, has been added to your profile. The account information will be routed to an administrator who will review the details and carry out any account verification that is required. You will be notified once the review is complete.										
Manage Bank Account Assignme	Manage Bank Account Assignments									
Addr Addre	Address Name 4545 MUSHROOM RD Address Details 4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States									
Add Create	Add Create									
Details Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
⊞ <u>Show</u> 987654		US Dollar		26-Jun-2013 🕅		1	$\bigcirc$	$\odot$	New	1

## 14. Click on the Save button.

Manage Bank Account Assignments											
								Cance!	Save		
Address Name 4545 MUSHROOM RD Address Details 4545 MUSHROOM RD STE 100, SAUCY, OH, 45654, United States											
Add Create											/
Details Account Number	IBAN	Currency	Bank Name	Start Date		End Date	Priority	Increase Priority	Decrease Priority	Status	Update
<u>⊟ Hide</u> 987654		US Dollar		26-Jun-2013			1	$\land$	$\odot$	New	1
Your Company Name My Company Account Routing Number 041000124								Account Type Branch Name			
Assignment Status Awaiting approval for general use of account											

15. Once your bank information is approved by Progressive, you will receive an email confirmation and the Assignment Status will change to "Approved".



# Add Bank Account to Multiple Payment Addresses

Once you have a bank account set up on your iSupplier account, you can add this same bank account to multiple payment addresses, if applicable.

## 1. Click on the "Banking Details" link

Profile Management
General
<ul> <li>Company Profile</li> </ul>
<ul> <li>Address Book</li> </ul>
<ul> <li>Contact Directory</li> </ul>
<ul> <li>Business</li> </ul>
Classifications
<ul> <li>Product &amp; Services</li> </ul>
<ul> <li>Banking Details</li> </ul>

#### 2. Choose "All Assignments" and then click Go.

Banking Details									
View All Assignments G	D							Cancel	Save
✓TIP Date format example: 22-Apr-	2013								
Add Create									
Details Account Number	IBAN	Currency	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.									

## 3. Click on the Assignments icon next to the payment address you want to add the bank account to.

Banking	Details			
View A	I Assignments	Go		
Details	Туре 🔻	Name	Details	Assignments
⊞ <u>Show</u>	General	FLOWERS R US	General accounts used at all supplier addresses.	
⊞ <u>Show</u>	Address	25255 LAVENDER	25255 LAVENDER ST, PURPLE, CA, 33465, United States	
⊞ <u>Show</u>	Address	12345 DAISY CIR	12345 DAISY CIRCLE, ROSE, OH, 44345, United States	
⊞ <u>Show</u>	Address	77878 TULIP RD	77878 TULIP RD,CARNATION,FL,44356,United States	

#### 4. Click on the Add button.

Manage Bank Account Assignr	nents									
1	Addr Addr	ess Name 2 ess Details 2	5255 LAVENDER 5255 LAVENDER	ST,PURPLE,CA	4,33465,Unit	ed States			Cance	Save
Add Create										
Details Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.										

#### 5. Check the box next to the Account Number you want associated to your payment address. Click Save.

Add Account						
						Cancel Save
Select All Select None						
Select Account Number	Account Name	IBAN	Currency	Bank Name	Branch Name	Status
Average 200 Ave			US Dollar	051123456	051123456	New
▼ XXXX7566			US Dollar	PNC	041000124	Approved

**Claims Procedure Manual** 

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6. A confirmation notice will display stating the bank account has been updated via your Assignment request. (Your bank account information is now routing to Progressive for approval)

Con	firmation										
The	general account ass	ignments have be	en updated.								
Manage	Bank Account As	sianments									
		Address Nam Address Detai	e 25255 LA s 25255 LA	VENDER VENDER ST,PURF	PLE,CA,33465,Uni	ted Sta	ates		С	ancel	Save
Add	Create										
Details	Account Number	IBAN Currency	Bank Name	Start Date	End Date		Priority	Increase Priority	Decrease Priority	Status	Update
⊞ Show	XXXX7566	US Dollar	PNC	24-Apr-2013			1	A	$\odot$	Approved	1
							-	<u> </u>	<u> </u>		-
7. C 8. C	lick on the s	Snow <sup>®</sup> nyp Save butto	eriink (a ר.	DOVE) to see	e the details	of y	our re	quest.			
Manage	Bank Account Ass	ignments									
		Address Name Address Detail	25255 LAV	/ENDER /ENDER ST,PURP	LE,CA,33465,Uni	ted Sta	ites		C	Cancel	Save
Add	Create										
Details	Account Number	<b>IBAN</b> Currency	Bank Name	Start Date	End Date		Priority	Increase Priority	Decrease Priority	Status	Update
⊟Hide	0000(7566	US Dollar	PNC	24-Apr-2013			1	0	$\odot$	Approved	1
	Your	Company Name Routing Number	041000124					Account Type C Branch Name C	hecking 041000124		

9. Once your bank account is approved you will receive an email confirmation and the Assignment Status will change to "Approved"

Assignment Status Awaiting approval for general use of account

# Inactivate Bank Account for a Specific Payment Address



2. Click on the Banking Details link.





3. Choose All Assignments from the drop down list and then click Go.

	<i>,</i>								
Banking Details									
View All Assignments  Go	•							Cancel	Save
✓TIP Date format example: 24-Apr-2	2013								
Add Create									
Details Account Number	IBAN	Currency	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.									

4. Click on the Assignments icon for the address that requires the banking to be inactive.

Banking	g Details			
View	All Assignments	Go		
Details	Туре 🔻	Name	Details	Assignments
+ Show	General	FLOWERS R US	General accounts used at all supplier addresses.	
<del>Show</del>	Address	12345 DAISY CIR	12345 DAISY CIRCLE,ROSE,OH,44345,United States	
+ Show	Address	77878 TULIP RD	77878 TULIP RD,CARNATION,FL,44356,United States	

5. Click on the calendar icon and choose the date to end date the banking information and then click on the Save button.

manago barn recount rouge		Address Address D	Name 77878 T letails 77878 T	ULIP RD ULIP RD,CARNATION,FL,44356,	United States				Cance <u>l</u>	Save
Add Create						/				
Details Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
E Show XXXX7566		US Dollar	PNC	24-Apr-2013	25-Apr-2013	1	$\bigcirc$	$\odot$	Approved	1

#### 6. The system will display a Confirmation message that your account has been updated.

Confirmation The general account assignmen	ts have been updated	ed.							
Manage Bank Account Assignme	nts								
	Address Name Address Details	77878 TULIP RD 77878 TULIP RD,CAR	NATION, FL, 443	56,United States			С	ance <u>l</u>	Save
Add Create									
Details Account Number IBA	N Currency Bank	k Name Start Date		End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	US Dollar PNC	24-Apr-20	)13 🔲	25-Apr-2013	1	$\odot$	$\odot$	Approved	1

**NOTE**: If you are deactivating your banking information for a specific address because it has changed, be sure to set up the new banking information for the same address immediately after you submit your deactivation request. This will ensure that there is no disruption in your EFT payments.



# Sample of Claims EFT Notification of Deposit

Depending on your company's specific setup with Progressive, you may either receive a consolidated payment file (this is only available to select companies) each time an EFT payment has been made to your bank account OR an EFT Notification of Deposit that is sent via email with an attached .pdf file.

A sample of the emailed EFT Notice of Deposit is below for your reference:

NOTICE OF DEPOSIT: ELECTRONIC FUNDS TRANSFER # 710001078           CS PAYMENTS COLORADO 141725 SOUTH MAIN COLORADO SPRINGS, CO 80901           The Progressive Group of Insurance Compan (1417)2901111           Notice of Deposit: Progressive S Supplier Number: Total Payment Amount:         09/14/2007 200046 S52,639.24         Account Number: 200046 S52,639.24         ****0 Total Payment Amount:           This amount should appear in your bank account within 3 business days from the notice date. If you have any questions regarding this payment, please contact Progressive's (Supplier Support Team at 1-877-816-7473. If you have questions regarding a specific claim, please contact the assigned claims adjuster.         COVERAGE         INVOICE #         COMPANY         AMOUN Insurance Company           07-3441427         VINCENT P SCHAAD         97 PONTI GRAND PRIX GRAND PRIX URCENT P         1162WP12K276076444         COLL         6230         Progressive Casualty Insurance Company         \$50.001 Insurance Company           07-3601434         MARTHA RINKER         02 PROD         11FMZU73E675080500         COLL         6190         Progressive Classic Insurance Company         \$10.461.81 Insurance Company           07-3861383         KIMBERTY L LOWE         08 JEEP         1J4GL58KX75038063         COLL         6192         Progressive Classic Insurance Company         \$10.514.81 Insurance Company         \$10.514.81 Insurance Company         \$10.514.81 Insurance Company         \$10.514.81 Insurance Company	PROGRESSIVE	<b>F</b> *					Page 1 of 1
CS PAYMENTS COLORADO 141725 SOUTH MAIN COLORADO SPRINSS, CO 80901       The Progressive Group of Insurance Compan 8030 Wilson Mills Mayfield Village, OH 44 (147) 3891111         Notice of Deposit:       08/14/2007       Account Number:       10/16/2007         Progressive's Supplier Number:       200046       Total Payment Amount:       Account Number:       10/1000         Total Payment Amount:       \$52,639.24       Total Number of Invoices:       10/1000         Total Payment Amount:       \$52,639.24       Total Number of Invoices:       10/1000         Total Payment Amount:       \$52,639.24       Total Number of Invoices:       10/1000         Total Payment Amount:       \$52,639.24       Total Number of Invoices:       10/1000         Total Number of Invoices:       Details:       Details:       Details:       Details:         OPTIMER NAME       VEHICLE DESCRIPTION Incompressive's OPDITI GRAND PRIX CP       IG2WP12K275076444       COLL       6230       Progressive Casualty Insurance Company       \$50.00         07-3601434       MARTHA RINKER       02 FORD EXPLORER4X4       IFMZU73E875080500       COLL       6198       Progressive Classic Insurance Company       \$10,461.81         07-3601383       ALBERTY LUBERTY EXPLORER4X4       06 JEEP       1J4GL58KX75036963       COLL       6194       Progressive Classic Insurance Company		NOTIC	E OF DEPOSIT: ELECTR	ONIC FUNDS TR	RANSFER # 7100010	78	
Notice of Deposit:       09/14/2007       Account Number:       ****00         Progressive's Supplier Number:       208046       Routing Number:       101000         Total Payment Amount:       \$52,639.24       Total Number of Invoices:       101000         This amount should appear in your bank account within 3 business days from the notice date. If you have any questions regarding this payment, please contact Progressive's iSupplier Support Team at 1-877-616-7473. If you have questions regarding a specific claim, please contact the assigned claims adjuster.       Details:         Details:         CLAIM #       CUSTOMER       VEHICLE       VIN       COVERAGE       INVOICE #       COMPANY       AMOUN         07-3441427       VINCENT P       97 PONTI       1G2WP12K275076444       COLL       6230       Progressive Casualty       \$500.00         07-3601434       MARTHA RINKER       02 FORD       1FMZU73E675060500       COLL       6196       Progressive Direct       \$10,461.80         07-3641362       KIMBERLYL       06 JEEP       1J4GL58KX75038983       COLL       6192       Progressive Classic       \$10,514.80         07-3661383       ALBERT L       96 FORD       1FALP52UX75080453       COLL       6194       Progressive       \$10,766.76         07-3661383       ALBERT L       9	CS PAYMENTS COLORADO 141725 SOUTH MAIN COLORADO SPRINGS, CO 80901 (147) 3691111					The Progressive Group of In 6 Mayfiel	nsurance Companies 3300 Wilson Mills Rd. Id Village, OH 44143
This amount should appear in your bank account within 3 business days from the notice date. If you have any questions regarding this payment, please contact Progressive's isopplier Support Team at 1-877-616-7473. If you have questions regarding a specific claim, please contact the assigned claims adjuster.         Details:         CLAIM #       CUSTOMER       VEHICLE       VIN       COVERAGE       INVOICE #       COMPANY       AMOUN         07-3441427       VINECT P       07 POPTI       162WP12K275076444       COLL       6230       Progressive Casually insurance Company       \$500.00         07-3441427       VINECT P       97 PONTI       162WP12K275076444       COLL       6230       Progressive Casually insurance Company       \$500.00         07-3601434       MARTHA RINKER       02 FORD       1FMZU73E675080500       COLL       6198       Progressive Direct insurance Company       \$10,461.81         07-3641362       KIMBERLY L       06 JEEP       1J4GL58KX75038983       COLL       6192       Progressive Classic       \$10,761.438         07-3661383       ALBERT L       96 FORD       1FALP62UX75080453       COLL       6194       Progressive       \$10,766.76	Notice of Deposit: Progressive's Supplier Number: Total Payment Amount:	09/14/2007 206046 \$52,639.24				Account Number: Routing Number: Total Number of Invoices:	101000019 7
Details:           CLAIM #         CUSTOMER NAME         VEHICLE DESCRIPTION         VIN         COVERAGE         INVOICE #         COMPANY         AMOUN           07-3441427         VINCENT P SCHAAD         97 PONTI GRAND PRIX CP         102WP12k275076444         COLL         6230         Progressive Casualty Insurance Company         \$500.01           07-3601434         MARTHA RINKER         02 FORD EXPLORER4X4         1FMZU73E675060500         COLL         6198         Progressive Direct Insurance Company         \$10,461.81           07-3661383         KIMBERLY L LOWE         06 JEEP UBERTY 4X4SW         1J4GL58KX75038983         COLL         6192         Progressive Classic Insurance Company         \$10,514.81           07-3661383         ALBERT L PEDICIN         96 FORD TAURUS         1FALP52UX75080453         COLL         6194         Progressive Networksen Insurance         \$10,766.76	This amount should appear in your t iSupplier Support Team at 1-877-81	oank account within 3 bus 8-7473. If you have ques	siness days from the notice stions regarding a specific o	date. If you have laim, please cont	any questions regard act the assigned clain	ting this payment, please contact Pl ns adjuster.	rogressive's
CLAIM #         CUSTOMER NAME         VEHICLE DESCRIPTION         VIN         COVERAGE         INVOICE #         COMPANY         AMOUNTICIDATION           07-3441427         VINCENT P SCHAAD         97 PONTI GRAND RIX CP         162WP12k275076444         COLL         6230         Progressive Casualty Insurance Company         \$500.01           07-3501434         MARTHA RINKER         02 FORD EXPLORER4X4         1FMZU73E675060500         COLL         6196         Progressive Direct Insurance Company         \$10,461.80           07-3641382         KIMBERLY L LOWE         08 JEEP LIBERTY 4X4SW         1J4GL58KX75038983         COLL         6192         Progressive Classic Insurance Company         \$10,514.80           07-3661383         ALBERT L PEDIENT         96 FORD TAURUS         1FALP52UX75060453         COLL         6194         Progressive Methworken Insurance         \$10,766.70			I	Details:			
07-3441427         VINCENT P SCHAAD         97 PONTI (GRAND PRIX CP         1G2WP12k275076444         COLL         6230         Progressive Casualty Insurance Company         \$500.0i           07-3601434         MARTHA RINKER         02 FORD EXPLORER4X4         1FMZU73E675060500         COLL         6196         Progressive Direct Insurance Company         \$10,461.8i           07-3601434         MARTHA RINKER         02 FORD EXPLORER4X4         1FMZU73E675060500         COLL         6196         Progressive Direct Insurance Company         \$10,461.8i           07-3641362         KIMBERLY L UWE         06 JEEP LIBERTY 4X4SW         1J4GL58KX75038983         COLL         6192         Progressive Classic Insurance Company         \$10,514.8i           07-3661383         ALBERT L PEDICIM         96 FORD         1FALP52UX75080453         COLL         6194         Progressive         \$10,766.7i	CLAIM # CUSTOMER	VEHICLE	VIN	COVERAGE	INVOICE #	COMPANY	AMOUNT
07-3501434         MARTHA_RINKER         02 FORD EXPLORER4X4         IFMZU73E875060500 SW         COLL         6196         Progressive Direct Insurance Company         \$10,461.8           07-3641362         KIMBERLY L LOWE         08 JEEP LIBERTY 4X4SW         1J4GL58KX75038963         COLL         6192         Progressive Classic Insurance Company         \$10,514.80           07-3661383         ALBERT L PEDEDICIN         96 FORD         1FALP52UX75080453         COLL         6194         Progressive Insurance         \$10,768.76	07-3441427 VINCENT P SCHAAD	97 PONTI GRAND PRIX CP	1G2WP12K275076444	COLL	6230	Progressive Casualty Insurance Company	\$500.00
07-3641362         KIMBERLY L         06 JEEP         1J4GL58KX75038963         COLL         6192         Progressive Classic         \$10,514.8i           LOWE         LIBERTY         4X4SW         Insurance Company         \$10,514.8i         Insurance Company         \$10,514.8i           07-3661383         ALBERT L         95 FORD         1FALP52UX75080453         COLL         6194         Progressive         \$10,766.7i           PEEDIGM         TAURUIS         1FALP52UX75080453         COLL         6194         Progressive         \$10,766.7i	07-3501434 MARTHA RINK	ER 02 FORD EXPLORER4X4 SW	1FMZU73E675060500	COLL	6196	Progressive Direct Insurance Company	\$10,461.86
07-3861383 ALBERT L 95 FORD 1FALP52UX75080453 COLL 6194 Progressive \$10,766.74	07-3641362 KIMBERLY L LOWE	06 JEEP LIBERTY 4X4SW	1J4GL58KX75038963	COLL	6192	Progressive Classic Insurance Company	\$10,514.86
Gil/4D Company	07-3661383 ALBERT L PERRIEN	95 FORD TAURUS GL/S4D	1FALP52UX75060453	COLL	6194	Progressive Northwestern Insurance Company	\$10,766.78
07-3761397 KEITH SMART 05 HONDA 1HGES267X75081881 COLL 6182 Progressive Casualty \$9,730.40 CIVIC EX 4D Insurance Company	07-3761397 KEITH SMART	05 HONDA CIVIC EX 4D	1HGES267X75061861	COLL	6182	Progressive Casualty Insurance Company	\$9,730.49
07-3781304 DOROTHY 02 MERCE S430 WDBNG70J775080682 COLL 6187 Progressive Casuality \$10,580.24 MCCLURE 4D \$10,580.24	07-3781304 DOROTHY MCCLURE	02 MERCE \$430 4D	WDBNG70J775060662	COLL	6187	Progressive Casualty Insurance Company	\$10,580.25
07-3941425 JON EIKANAS 97 MITSU 4A3AK44Y275061882 COLL,PD 6223 Progressive \$85.00 ECLIPSE GS 2H 4A3AK44Y275061882 COLL,PD 6223 Progressive \$85.00 Northwestern Insurance Company	07-3941425 JON EIKANAS	97 MITSU ECLIPSE GS 2H	4A3AK44Y275061882	COLL,PD	6223	Progressive Northwestern Insurance Company	\$85.00



# View/Export Invoice Details

1. Click on the Finance tab.



2. Enter a specific Invoice Number, Click Go. **Note:** To search for all invoices, enter the % sign in the Invoice Number field, Click Go.

						Export
TIP Enter at least one Search crite	eria to search. Use % to p	erform a search with inco	mplete information. Exa	mple: To search for	Jim Smith, type either: %Jim o	vr %Smi
Invoice Number	100645	Payment Status	<b>•</b>	Claim#		
EFT/Payment number		Invoice Date From		Customer Name		
\$ Amount From		Invoice Date To		VIN		
\$ Amount To	Go Clear					
	do clear					

3. View the invoice details. You can also click on the EFT/Payment Number hyperlink to view payment details on this invoice.

TIP Enter at least one Search cr	teria to search. Use % to perf	orm a search with incor	nplete informatio	n. Example	:: To search for Jim S	Smith, type either	: %Jim or %Smi	
Invoice Number	100645	Payment Status	•	ſ	Claim#			
EET (Day mont number		Invoice Date From			ustomor Namo			
LI T/Payment number					usconner Marne			
\$ Amount From		Invoice Date To			VIN			
\$ Amount To								
	Go Clear							
Invoice Number Description				Currency	Invoice Amount	Invoice Date	EFT/Payment Number	Supplier Site
100645 4 08-1213799/N	ICCOY,MARTHA/03 LEXUS IS	300 4D/JTHBD192530	072466	USD	15936.40	02-Jun-2008	710063869 - Electronic	9490 9TH

4. Click on the Invoice Number hyperlink for a different view of the invoice details.

Standard Invoice	: 100645 (Total USD 15936.40)											
Currency=USD											- E	Second and
							_					export
General			Amount Summa	171			F	ayment Informati	on			
General			Anoune Summa	' Y					Paid 15	936.40		
Invoice Date	02-Jun-2008		Item	15936.40				St	atus Pa	id		
Status	Approved		Prepayment	0.00				Payment	Date 03	-JUN-2008		
On Hold			Retainage	0.00					00	:00:00		
Attachments	None		Withholding Tax	0.00				EFT/Payment Nur	nber <u>71</u>	0063869		
Supplier	CALIBER COLLISION CENTERS CALIFORNIA		Tota	15936.40				Т	erm DU	E ON RECEIPT		
Supplier Site	9490 9TH											
Address	9490 9TH ST											
	RANCHO CUCAMONGA, CA 91730											
Invoice Lines	Scheduled Payments Hold Reasons											
Line 🔺 Type De	scription		Qty UOM P	rice Tax Ind	cluded	Amount	Retainage Sta	us PO Number	PO Line	PO Shipment	Buyer	Receipt
1 Item 08-	1213799/MCCOY,MARTHA/03 LEXUS IS 300 4D/JTHBD1925	30072466			1	15936.40	0.00 App	oved				

- 5. Click on the Export button (upper right hand corner)
- 6. The file download box will appear, click Save to save your information in .csv format. Click Open to open the file.

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File Downle	oad	×
Do you	want to open or save this file?	
Xa,	Name: export.csv Type: Microsoft Excel Comma Separated Values File From: <b>supplierspsit.progressive.com</b>	
	Open Save Cancel	]
2	While files from the Internet can be useful, some files can potentially harr your computer. If you do not trust the source, do not open or save this file	n

## Invoice results example.

А	В	С	D	E	F	G
Invoice N	Description	Currency	Invoice An	Invoice Date	EFT/Payment Number	Supplier Site
100189	08-3518248/JONES,MARY/06 DODGE MAGNU	USD	1065.61	01-Jun-08	710063072 - Electroni	200 S WINEVILLE



# View/Export Payment Details

1. Clicl	1. Click on the Finance tab.								
Home	Orders	Admin	Finance						

2. Enter a specific Payment Number, Click Go. **Note:** To search for all payments, enter the % sign in the Payment Number field, Click Go.

nvoice Summary							
							Export
TIP Enter at least one Search crite	eria to search. Use % to pe	rform a search with inco	mplete information. Ex	ample: To search for	Jim Smith, type either: %Jim (	or %Smi	
		Deverse the Charter				1	
Invoice Number		Payment Status		Claim#			
EFT/Payment number	710618576	Invoice Date From		Customer Name			
\$ Amount From		Invoice Date To		VIN			
\$ Amount To		_					
	Go Clear						

#### 3. View the payment details.

TIP Enter at least	one Search crit	eria to search. Use % to perfo	rm a search with incor	nplete informatio	n. Example	e: To search for Jim S	Smith, type either	r: %Jim or %Smi	L
In	ivoice Number		Payment Status	•	_	Claim#			
EFT/Pay	ment number	710618576	Invoice Date From		<b></b>	Customer Name			
\$	Amount From		Invoice Date To			VIN			
	\$ Amount To								
		Go Clear							/
Invoice Number	Description				Currency	/ Invoice Amount	Invoice Date	EFT/Payment Numbe	Supplier Site
1000570	10-5806466/DA	VIS,DANIEL/09 TOYOT SCIO	N TC LB/JTKDE16789	0291737	USD .	585.62	25-Feb-2010	710618576 - Electronic	2607 N TOWNE

4. Click on the EFT/Payment Number hyperlink (see above arrow).

## 5. Click on the EFT/Payment Number hyperlink again

Payments			
Invoice	EFT/Payment Number	Currency	\$ Amount
1000570	710618576	USD	585.62
			Export

6. This produces a separate view of the payment details. **Note**: You can also click on the Invoice Number hyperlink to view invoice details on this payment.

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**Claims Procedure Manual** 

EFT/Payment	Number	711355310	
Payme	ent Date	24-Feb-2013	
C	Currency	USD	
Total	Amount	6478.58	
V	oid Date		
Bank Accourt	nt Name	CTB EFT Acc	ount
Supplier	Address	INDIO CA	
		82279 AVEN	UE 44
	City	INDIO	
	State	CA	
	Zip	92201	
Export Invo	ices		
Invoice	\$ Amou	unt	Description
8862828	929.06		13-5306721/SANCHEZ,LEONOR/99 HONDA ACCORD LX CP/1HGCG3148XA002645
8864267	5549.52	2	13-1105885/GANDARILLA,REYNA/12 NISSA VERSA BASE/4D/3N1CN7AP1CL935654
			Export Payment

- 7. Click Export
- 8. The file download box will appear, click Save to save your information in .csv format. Click Open to open the file in Excel.

File Downl	oad	×
Do you	want to open or save this file?	
Xa,	Name: export.csv Type: Microsoft Excel Comma Separated Values File From: <b>supplierspsit.progressive.com</b>	
	Open Save Cancel	
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file.	1

#### Payment results example.

EFT/Payment Number	Payment Date	Currency	Total Amo	Void Date	Bank Account Name	Supplier Ad	ldress	City	State	Zip
711355310	24-Feb-13	USD	6478.58		CTB EFT Account	INDIO CA	82559 AVENUE 44	INDIO	CA	92201
Invoice	\$ Amount	Descriptio	n							
8862828	929.06	13-530672	21/SMITH,N	1ARY/99 HC	ONDA ACCORD LX CP,	/1HGCG314	8XA002645			
8864267	5549.52	13-110588	-1105885/JONES,JOE/12 NISSA VERSA BASE/4D/3N1CN7AP1CL935654							



# Troubleshooting

# Self –Service Password Reset

Follow the steps below to reset your user password.

- 1. Access the iSupplier Login Page.
- 2. Click Login Assistance, located directly below the Login button.



3. Enter your User Name and click the Forgot Password button.



## 4. The following Confirmation message will appear. Click OK.



5. Open your email and click on the Reset your Password hyperlink.





6. The following screen will appear. Enter your user name, your new password and confirm your new password.



7. The following Confirmation message will display. Click OK.



8. Login to iSupplier using your newly created password.

## **Internet Browser Issues**

If you are experiencing issues logging into iSupplier you may need to utilize another browser or another version of Internet Explorer.

The following browsers are certified by Oracle as compatible with Release 12 e-Business Suite – iSupplier Portal.

- IE 11, 10, 9, 8, and select IE 7 and 6 Windows configurations
- Firefox for Windows Users
- Safari for Mac Users
- Chrome

If you are still experiencing issues logging in after using one of the compatible browsers or Internet Explorer versions above, please send an email to <u>isuppliersupport@progressive.com</u> with the issue details along with a print screen of any errors you are receiving.

## **Progressive PDF Files**

Progressive initially and periodically will be sending your company .pdf files. These files will typically contain information related to the iSupplier program and/or your payment details. Payment detail .pdf files are sent every time a payment is made to your company.

Some Internet Providers, particularly AOL will automatically encode and translate the attachment using a system called MIME (Multipurpose Internet Mail Extensions) when they are transferred to your computer.

MIME converts the binary attachment to a text format that can be handled by Internet email. The message's recipient needs a program that can decode a MIME e-mail and turn it back into a binary file that the computer can work with. The program most often used is WinZip. It is recommended though, that you contact your Internet Provider for additional help on opening/converting the file attachments that Progressive sends if you are experiencing difficulty opening them.