

PROGRESSIVE[®]

iSupplier Portal
**iSupplier Corporate Suppliers Procedures
Manual**



iSupplier Portal

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Overview

Introduction

What is iSupplier?

iSupplier is a self-service, web based application that can be accessed through a secure interface with Progressive. iSupplier will allow you to view Purchase Orders, create invoices, view payment information, as well as manage your bank account information. iSupplier will be the primary way that you will be able to answer the following questions:

- What has been ordered from Progressive?
- When did I invoice Progressive?
- How much was I paid?
- When was I paid?
- What was I paid for?
- Who from my company has access to iSupplier?

iSupplier allows Progressive to provide added security regarding your bank account and other private data. By using iSupplier, your information will not be shared with other persons or companies. We limit access to your information and use safeguards to protect it. We restrict access to your non-public personal information to our employees who must use it to provide a service. Our employee use of the information is limited by law and written agreements where appropriate. In addition, our employees are also required to adhere to high standards of ethics and integrity in performing their jobs as documented in Progressive's employee code of conduct. Progressive's personnel will not have access to your bank account information. These security measures help ensure that your data is secured and encrypted.

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 e-mail.

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

External Phone Number: 1-877-616-7473

Fax Number: 440-603-5560

System Availability: 24/7

E-mail: corporateiSuppliersupport@progressive.com

Address:

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

The following information is available at <http://www.progressive.com/Suppliers/Suppliers.aspx>

- iSupplier User Guide
- FAQ's – Frequently Asked Questions
- Add/Delete User Form

The direct link to the Login page of iSupplier is: <https://suppliers.progressive.com/>

Supplier Privacy

Clicking on the Privacy Statement from the home page will take you to the document outlined below which explains Progressive's privacy practices.

The screenshot shows the Progressive iSupplier Portal interface. At the top, there is a navigation bar with links for Home, Orders, Shipments, Admin, and Finance. Below this is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. A message below the search bar reads: 'Need help? Send an email to CorporateSupplierSupport@progressive.com, or call the Corporate Supplier Support Team at 877-616-7473.' The main content area is divided into sections: 'Notifications' (with a 'Full List' button), 'Orders At A Glance' (with a 'Full List' button), and a table of orders. The table has columns for PO Number, Description, and Order Date. The footer contains a 'Privacy Statement' link, which is highlighted with a red arrow, and a copyright notice: 'Copyright (c) 2006, Oracle. All rights reserved.'

PO Number	Description	Order Date
648325		08-Aug-2013 14:50:07
648317		08-Aug-2013 14:30:27
648324		08-Aug-2013 09:49:54
648321		07-Aug-2013 18:02:33
648320		07-Aug-2013 16:04:04

About this notice

Your privacy is important to us. This explains Progressive's privacy practices for Suppliers of Progressive who utilize this site. Different privacy policies may apply to Web sites owned or offered by Progressive. This Web site is owned and operated by Progressive Casualty Insurance Company, 6300 Wilson Mills Road, Mayfield Village, OH 44143.

What information do you collect about me?

This site allows you to submit and update information, such as you and/or your company's name, address, bank, and bank account number, so that we may facilitate the electronic payment of funds that we owe you for services you have provided to us. We only collect this information if you choose to provide it to us.

Who might get information about me from Progressive?

We will not share the information that you provide through this site, other than as follows: to the bank to whom you have authorized us to make payment; to service providers that help us fulfill the electronic fund transfer; and as required to cooperate with law enforcement or regulatory (including, but not limited to, tax) authorities, detect or prevent fraud, comply with legal process or court orders, and as otherwise required or permitted by law.

How do you protect my information?

We restrict access to your information that you provide through this site to our employees and others who we feel must use it to facilitate the electronic payment of funds. Their use of the information is limited by law, our employee code of business conduct and ethics, and written agreements where appropriate. We also maintain physical, electronic and procedural safeguards to protect this information.

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Your use of this site is expressly conditioned on your acceptance of the terms and conditions below. By using this site, you signify your assent to these Terms and Conditions and agree to be bound thereby. If you do not agree with any part of the following Terms and Conditions, you must not use this site.

The Terms and Conditions may be modified by Progressive from time to time. Continued use of this site by you will constitute your acceptance of any modifications to the Terms and Conditions, so it's wise to check this page

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Use of This Website

The purpose of this site is to facilitate the electronic payment of funds that we owe you for services you have provided to us. You agree not to disrupt, modify or interfere with this site, or impede or interfere with others' use of this site, or its associated software, hardware and servers in any way. You further agree not to alter or tamper with any information on or associated with this site. This site and the content provided in this site, including the text, graphics, button icons, and data compilations, may not be copied, reproduced, republished, uploaded, posted, transmitted or distributed without the written permission of Progressive, except that you may display and print the materials presented on this site for the specific business purpose set forth herein. Systematic retrieval of data or other content from this site to create or compile, directly or indirectly, a collection, compilation, database or directory, without prior written permission from Progressive, is prohibited.

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You are responsible for maintaining the confidentiality of your password and/or PIN. You agree to accept responsibility for all activities that occur under your Password/PIN. Progressive is not liable for any unauthorized access to your personal information that is not the direct result of gross negligence on the part of Progressive. You will notify Progressive immediately if you believe someone else has obtained your password/PIN or any unauthorized access under your account has occurred or may occur. Progressive may block access to your password/PIN without prior notice if we believe your password/PIN is being used by someone other than you, if any unauthorized access to your personal information has occurred or may occur, or for other reasons, including, without limitation, system upgrades and/or modifications.

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Jurisdiction/Enforceability

Use of this site shall be governed by and construed in accordance with the laws of the State of Ohio without giving effect to any principles of conflict of laws. Any dispute concerning this site or these Terms and Conditions shall be subject to the exclusive venue of a court of competent jurisdiction in Cuyahoga County, Ohio. Your use of this site constitutes your express consent to the personal jurisdiction of such courts for the purpose of resolving any such dispute. Should any provision of these Terms and Conditions of use be held invalid, unlawful or for any reason unenforceable, then the invalid, unlawful or unenforceable provision shall be severable from the remaining provisions. Such invalid, unlawful or unenforceable provision shall not affect the validity or enforceability of the remaining provisions.

Indemnification

You agree to defend and indemnify Progressive, including all corporate affiliates, and their respective officers, directors, employees and agents from and against any claim, cause of action or demand, including without limitation reasonable legal and accounting fees, brought by or on your behalf or by third parties as a result of your breach of these Terms and Conditions.

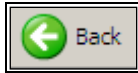
Attorney's Fees

In the event Progressive takes legal action against you in order to enforce, protect or defend any of its rights pursuant to these Terms and Conditions and prevails, you agree to pay all reasonable costs and fees incurred by Progressive, including but not limited attorneys' fees, in addition to any other relief to which Progressive may be entitled.

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.

Icons

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

The pencil icon allows you to make field updates.



Click on the calendar icon to select a date.

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.

Search Features

Simple Search: From the Home Page click the Full List button, located under Orders at a Glance. This feature allows you to search for the following: All Purchase Orders, Purchase Orders to Acknowledge and Purchase Orders Pending Supplier Change.

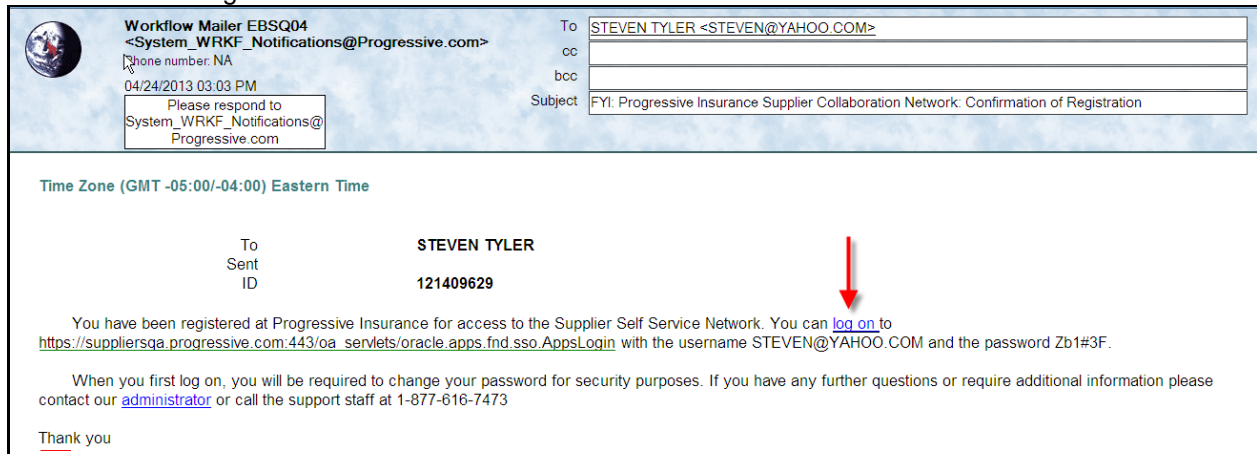
Advanced Search: From the Home Page click the Full List, located under Orders at a Glance, Then click on the Advanced Search button. Enter the search criteria. Select the applicable radio dial, show data when any/all conditions are met.

Introducing iSupplier

Supplier Login

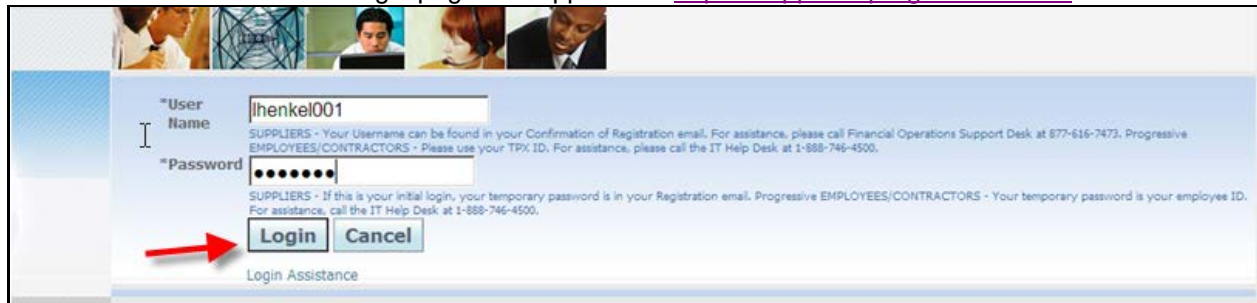
You will receive an e-mail from Progressive that contains the URL to iSupplier. The subject line will display: FYI: Progressive Insurance Supplier Collaboration Network: Confirmation of Registration.

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



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

NOTE: The direct link to the Login page of iSupplier is : <https://suppliers.progressive.com/>



3. You will be immediately prompted to change your password. Enter the current password.

NOTE: Passwords must be at least 5 characters long and will expire every 120 days.

4. Enter a new password. Re-enter the new password. Click Apply.

iSupplier Homepage

You are now at your iSupplier Home Page.

The screenshot shows the iSupplier Portal interface. At the top, there's a navigation bar with tabs for Home, Orders, Shipments, Admin, and Finance. A search bar is located below the navigation, with a dropdown menu set to 'PO Number' and a 'Go' button. A help message is displayed: 'Need help? Send an email to CorporateSupplierSupport@progressive.com, or call the Corporate iSupplier Support Team at 877-616-7473.'

The main content area is divided into several sections:

- Notifications:** A table with columns 'Subject' and 'Date'. It currently shows 'No results found.' and a 'Full List' button.
- Orders At A Glance:** A table with columns 'PO Number', 'Description', and 'Order Date'. It lists several POs with their respective dates and times.
- Orders, Shipments, and Finance:** A sidebar menu on the right with expandable sections for Orders (Agreements, Purchase Orders, Purchase History), Shipments (Overdue Receipts, Receipts), and Finance (Invoices, Payments).

Notifications

Notifications are a way of communicating information to you. Notifications will be available on iSupplier when changes are made that impact the Supplier (Bank Changes, Purchase Order changes, etc.). In addition to these notifications you will receive an e-mail notification.

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.

This close-up screenshot shows the Notifications table. A red arrow points to the 'Subject' column of the first notification, which is a hyperlink: 'Supplier Profile Management: Approval of Bank Account'. The table also shows the 'Date' column for each notification.

Subject	Date
Supplier Profile Management: Approval of Bank Account	05-Mar-2013 14:24:09
Supplier Profile Management: Failure of bank account verification	05-Mar-2013 14:19:08
Supplier Profile Management: Approval of Bank Account	05-Mar-2013 14:14:07
Supplier Profile Management: Verification of bank account	05-Mar-2013 14:14:07
CORPORATE OU - Response to your change request for Standard Purchase Order 585635,1	26-Feb-2013 13:24:50

Orders at a Glance

Orders at A Glance displays your five most recent Orders.

1. Select the Full List button to display all Orders. The Export option is located within the Full List. This allows users to export information within the orders view. To view a Purchase, click the Purchase Order Number hyperlink.

PO Number	Description	Order Date
585634	Test approval	13-Mar-2013 19:44:24
572531		08-Mar-2013 17:58:08
585644		08-Mar-2013 15:57:46
585635	Items for R12 bullpen	26-Feb-2013 13:24:49
585637	Test PO - Autocreate	24-Feb-2013 17:27:44

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. You will see Orders, Shipments and Account. Within those sections are hyperlinks that can be used to access specific information.

PROGRESSIVE iSupplier Portal

Home | Orders | Shipments | Admin | Finance

Search: PO Number

Need help? Send an email to CorporateSupplierSupport@progressive.com, or call the Corporate iSupplier Support Team at 877-616-7473.

Notifications

Subject	Date
No results found.	

Orders At A Glance

PO Number	Description	Order Date
648325		08-Aug-2013 14:50:07
648317		08-Aug-2013 14:30:27
648324		08-Aug-2013 09:49:54
648321		07-Aug-2013 18:02:33
648320		07-Aug-2013 16:04:04

Orders

- [Agreements](#)
- [Purchase Orders](#)
- [Purchase History](#)

Shipments

- [Overdue Receipts](#)
- [Receipts](#)

Finance

- [Invoices](#)
- [Payments](#)

Actions by Tab

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

- View and search by Purchase Order Number, Shipment Number, Invoice or Payment
- View Notifications
- View Orders At A Glance

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

- View Purchase Orders. Request changes or a cancellation to a Purchase Order.
- Acknowledge of Purchase Order (*not required*).
- View Change History

From the **Shipments Tab**, the following information is available:

- View and Search receipt information.
- In some cases, we require the Progressive Requester to complete a receipt before payment will be released. This tab will allow you to view this information.

From the **Admin Tab**, the following information is available:

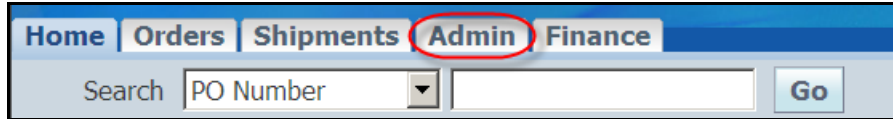
- Only available to user with Corp ISP Manager Responsibility.
- View, add or update the following information: Address Book, Contact Directory, Business Classifications, Products & Services, Bank Accounts & User Accounts.

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

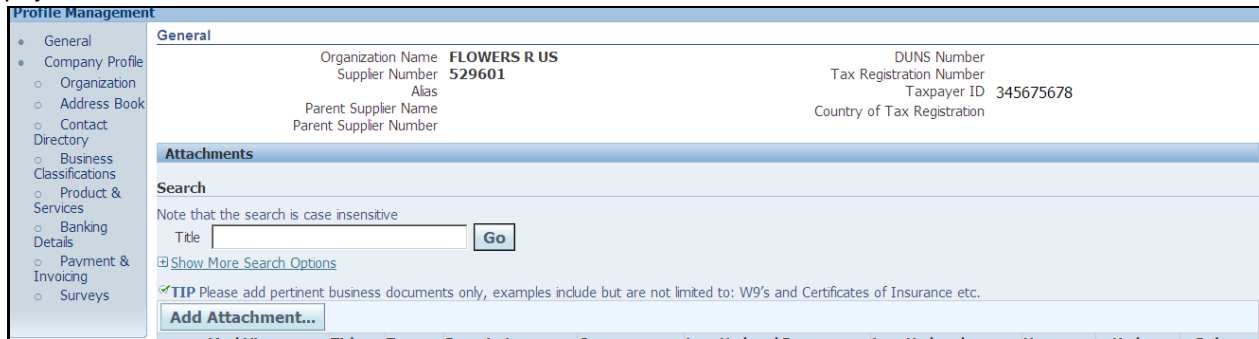
- Create, search and view invoices
- View and search payments

View Supplier Details

1. Click on the Admin tab.

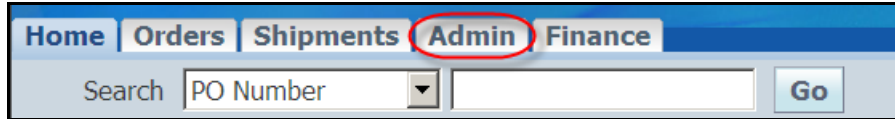


This view will produce your Supplier name as listed in our system, your Progressive Supplier Number and your Taxpayer ID.

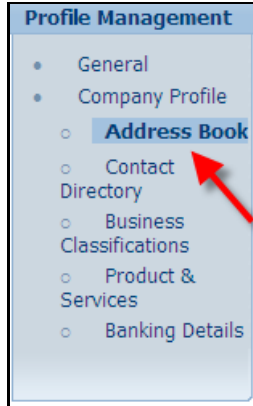


View Address Book Detail

1. Click on the Admin tab.



2. Click on the Address Book link.



The system will display all addresses assigned to your account.

Address Book				
Address Name ^	Address Details	Country	Update	Remove
12345 DAISY CIR	12345 DAISY CIRCLE ROSE, OH 44345	United States		
25255 LAVENDER	25255 LAVENDER ST PURPLE, CA 33465	United States		
77878 TULIP RD	77878 TULIP RD CARNATION, FL 44356	United States		

Add/Delete User

To add or remove a user from access to iSupplier for your company, you must complete a request form.

The request must be made by a current Authorized User with the ability to edit and view. If the Authorized User is no longer employed, the owner of the company must complete the form. You may request that the additional user be added with the ability to edit and view or view only.

Corp ISP Manager Responsibility - Edit and View:

- Manage bank account information
- Search/view payment remittance advice information
- Create Invoices

Corp ISP External View Responsibility - View Only:

- Search/view payment remittance advice information

An electronic copy of this form is available at www.progressive.com/Suppliers/Suppliers.aspx.

The completed form must be mailed, faxed or emailed 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 corporateiSuppliersupport@progressive.com

Sample Add/Delete User Form

Progressive Corporate Request to Add/Delete a user to iSupplier

Instructions: This form must be filled out in its entirety and be signed by an Authorized User already on the account with the Corporate ISP Manager responsibility. If the Authorized User is no longer employed, the owner of the Company must complete the form. There are several ways to complete & submit the form.

1. Complete on-line, sign, print & fax to: 440-603-8500, Attn: Supplier Maintenance
2. Print the form, complete, sign & send to: Progressive Insurance, Attn: Supplier Maintenance, PO Box 94506, Cleveland, OH 44101 or fax to above #.
3. Complete on-line, sign, print, scan and send via Email to: corporatesuppliersupport@progressive.com

Please choose one of the following: Add User Delete User

Requestor's Information
(this is information on the user submitting this request)

Supplier Name

Progressive Supplier #

Requestor's Name

Supplier's Address

Requestor's Email

Requestor's Title

Supplier's Tax ID

User's Information
(this is information on the user to be added to the account)

First, Last Name

Phone #

Email Address

User ID (will be fill in by Progressive after form is submitted)

User Access Type - What level of access should the new user have?

VIEW ONLY ACCESS/Corp ISP External View - view Invoice, PO, payment & bank information
 VIEW/EDIT ACCESS/Corp ISP Manager - same access as above plus user can create Invoices & modify bank information

If this request is to DELETE a user complete the following fields

User Name

Date to Delete

Authorized Representative's Signature Date

Corp Add/Delete User Form Rev 10-12

Add/Remove Address

All requests for address additions or removals to a Supplier's account must be in a written format and e-mailed to the following address: corporateiSuppliersupport@progressive.com.

The following information is required:

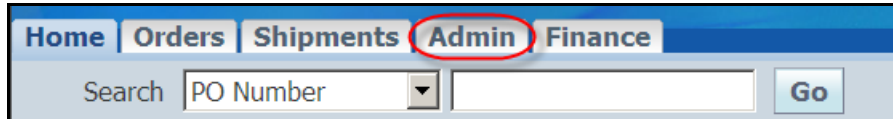
- Name of Supplier
- Progressive Supplier Number (See View Supplier Details)
- New Address, City, State, Zip
- Contact Name and Telephone Number
- Effective Date
- Reason for addition

Upon receipt of the above information, the new address will be processed within iSupplier. A confirmation will be sent to you.

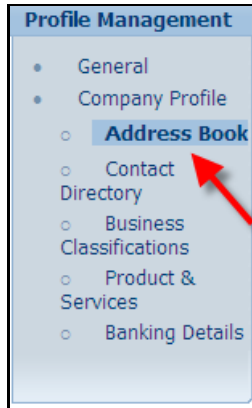
Change/Correct Address

For a full address change or a correction such as adding a Suite number or a PO Box number, etc., follow the steps below to change or correct an address listed on your account.

1. Click on the Admin tab.



2. Click on the Address Book link.




3. Click on the Update icon for the address to change/correct.

Address Name	Address Details	Country	Update
1179 JACKIE	1179 JACKIE ROAD MAYFIELD, OH 44143	United States	
123 MAIN	123 MAIN ST CLEVELAND, OH 44110	United States	


4. Make the necessary changes to your address. In the Note field add any applicable comments. Click the Save button.

The screenshot shows the 'Update Address' form for supplier 'DORATELLI INC' with supplier number '208737'. The form includes fields for Address Name, Country, Address Line 1-4, City/Town/Locality, State/Region, and Postal Code. A 'Note' field at the bottom contains the text: 'Please add Suite 220 to my address'. 'Cancel' and 'Save' buttons are visible at the top right.

- 5. You will receive a confirmation that your address has been modified. The request will be routed to the Buyer Admin for approval. You will receive a confirmation email once the change has been approved/processed by Progressive.

Confirmation
Details for your address have been modified. 

Address Book

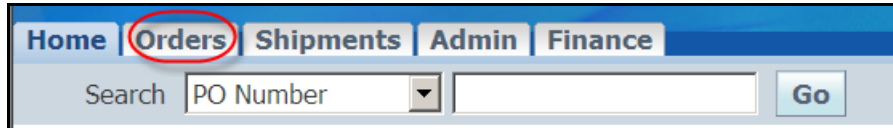
Address Name	Address Details	Country	Update
1179 JACKIE	1179 JACKIE ROAD STE 220 MAYFIELD, OH 44143	United States	

Viewing and Managing Purchase Orders

View Purchase Orders

Follow the steps below to view a Purchase Order, Print a Purchase Order or View a Buyer.

1. Click on the Orders tab.



2. The view will default to All Purchase Orders. Click the drop down box to refine the results view.

Purchase Orders | Agreements | Purchase History | Work Confirmations | Deliverables

Purchase Orders Multiple PO Change Export

Views
View: All Purchase Orders Go Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History Previous 25 26-50 Next 25

PO Select Number	Operating Rev Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
635609	0	CORPORATE OU	Standard PO	22-Feb-2013 09:38:40	PETRUCCIO, SUSAN J.	USD	566.10	Open		
635607	0	CORPORATE OU	Standard PO	22-Feb-2013 09:33:57	PETRUCCIO, SUSAN J.	USD	46.00	Open		
630845	1	CORPORATE OU	Standard PO	22-Feb-2013 08:42:15	PETRUCCIO, SUSAN J.	USD	80.00	Open		
635579	0	CORPORATE OU	Standard PO	22-Feb-2013 07:39:32	PETRUCCIO, SUSAN J.	USD	211.95	Open		

3. Locate the Purchase Order to review. Click the Purchase Order number hyperlink to view Order Information and Purchase Order Details.

Views
View: All Purchase Orders Go Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History Previous 1-25 Next 25

PO Select Number	Operating Rev Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
585634	2	CORPORATE OU	Global Contract Agreement	13-Mar-2013 19:44:24	KATONA, KAREN M	USD	5150.00	Requires Acknowledgment		
572531	1	CORPORATE OU	Standard PO	08-Mar-2013 17:58:08	MAHRER, CYNTHIA M	USD	100.00	Open		
585644	0	CORPORATE OU	Standard PO	08-Mar-2013 15:57:46	CAUNTER, CAROL A	USD	45.10	Open		

4. The Purchase Order Information and Details will populate.

Order Information

General	Terms and Conditions	Summary
Total 100.00	Payment Terms NET 30	Total 100.00
Supplier DONATELLI INC	Carrier BEST WAY	Received 0.00
Supplier Site 123 MAIN AVE	FOB DESTINATION	Invoiced 0.00
Address 123 MAIN AVE	Freight Terms	Payment Status Not Paid
DO NOT USE	Shipping Control	
MAYFIELD, OH 44124		
Buyer MAHRER, CYNTHIA M	Ship-To Address	
Order Date 08-Mar-2013	Address 5920 LANDERBROOK DR	
17:58:08	MAYFIELD HEIGHTS, OH 44124-6506	
Description	Bill-To Address	
Status Open	Address ATTENTION: ACCOUNTS PAYABLE	
Note to Supplier	P O BOX 94568	
Operating Unit CORPORATE OU	CLEVELAND, OH 44101	
Sourcing Document		
Supplier Order Number		

PO Details

Show All Details | Hide All Details

Details	Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Show	1	Goods		123456	Vendor Patches 8939050 & 9091772	EACH	1	100	100.00	Open		

Return to Orders: [Purchase Orders](#)

Actions: Request Changes Go Export

5. The following Actions are available from the drop down list of values. If you are requesting changes that option is only available on Purchase Orders where the status is Open. You can also Export any of the results.

Actions: Request Changes Go Export

- Request Changes
- Request Cancellation
- View Change History
- View PDF
- View Receipts
- View Invoices
- View Payments
- View Shipments

NOTE: The View PDF value allows the Supplier to view or print the Purchase Order The image provides you with the Requesters Name, Ship to Location and Desk Location.

6. The Buyer is listed on the Purchase Order. Click the Buyer hyperlink on the Purchase Order details page to view the Buyer's name, phone number and email address.

Purchase Order Status Definitions

The Orders tab provides you with a Full List of your Purchase Orders.

There are a variety of Purchase Order Statuses. The list below provides you with a brief definition. If you have questions regarding the status of a Purchase Order, please contact the Buyer indicated on the Purchase Order.

Select Order:		Acknowledge	Request Cancellation	Request Changes	View Change History	Previous 1-25		Next 25		
PO Number	Operating Rev Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
607071	2 CORPORATE OU	Standard PO		10-Apr-2013 10:12:35	CAUNTER, CAROL A	USD	860.00	Open		
607076	1 CORPORATE OU	Standard PO		10-Apr-2013 09:45:11	CAUNTER, CAROL A	USD	211.26	Supplier Change Pending		
607241	0 CORPORATE OU	Standard PO		04-Apr-2013 11:05:49	PETRUCCIO, SUSAN J.	USD	5616.00	Open		
607235	0 CORPORATE OU	Standard PO		03-Apr-2013 14:47:02	PETRUCCIO, SUSAN J.	USD	1288.50	Open		
607233	0 CORPORATE OU	Standard PO		03-Apr-2013 13:28:17	PETRUCCIO, SUSAN J.	USD	274.80	Open		
607225	0 CORPORATE OU	Standard PO		28-Mar-2013 09:08:08	PETRUCCIO, SUSAN J.	USD	28.14	Open		
607211	1 CORPORATE OU	Standard PO		13-Mar-2013 09:58:07	PETRUCCIO, SUSAN J.	USD	3579.00	Open		
607200	1 CORPORATE OU	Standard PO		12-Mar-2013 21:30:13	PETRUCCIO, SUSAN J.	USD	4772.00	Open		
607193	1 CORPORATE OU	Standard PO		11-Mar-2013 14:52:50	PETRUCCIO, SUSAN J.	USD	56.28	Open		
607138	0 CORPORATE OU	Global Blanket Agreement	Contract renewal for remanufactured/OEM toner cartridge purchases (CPA #357698)	02-Feb-2013 07:18:10	MONASTRA, ANGELA	USD	0.00	Open		
607131	0 CORPORATE OU	Standard PO		04-Jan-2013 11:12:35	TYRRELL, CHERYL LOIS	USD	74.31	Closed		
607122	0 CORPORATE OU	Standard PO		03-Jan-2013 12:52:39	PETRUCCIO, SUSAN J.	USD	27.01	Open		
607091	1 CORPORATE OU	Standard PO		10-Dec-2012 12:21:36	PETRUCCIO, SUSAN J.	USD	81.03	Open		
607084	0 CORPORATE OU	Standard PO		07-Dec-2012 14:37:31	PETRUCCIO, SUSAN J.	USD	146.72	Open		

Purchase Order Status and Definitions

Open – The Purchase Order has been created. Payment has not yet been made.

Closed – The Purchase Order has been created and is closed for invoicing.

Cancelled – The Purchase Order has been cancelled. Goods/Services no longer needed.

Accepted – Contract record status. The document type will indicate Contract vs. Standard Purchase Order.

Supplier Change Pending – The Supplier has requested a change to a Purchase Order. The Buyer has not yet taken action.

Buyer Change Pending – The customer/buyer has requested a change, waiting on Buyer action.

Requesting Purchase Order Changes

Purchase Order Document Types

Global Blanket Agreement – this is a document type that is used to make Progressive's catalog items available to our internal customers within our Purchasing system. Please do not request any changes or cancellations to this type of document type.

Global Contract Agreement – this is a document type that is used to create a contract record within Progressive's Purchasing system. Please do not request any changes or cancellations to this type of document type.

Standard PO – this is a document type that is used to generate a Purchase Order from Progressive to the Supplier. Changes and/or cancellations can be submitted for this type of document.

NOTE: Any issues you may experience with the submission of price or quantity changes and/or cancellations should be directed to the Buyer listed on the Purchase Order.

Purchase Order Line Statuses

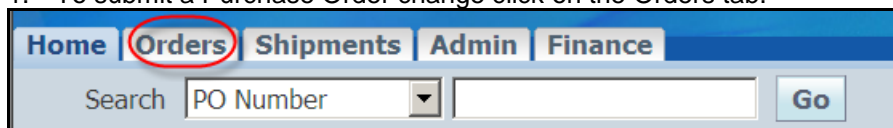
Closed - If the Purchase Order is fully matched, the status of the Purchase Order will be closed. If necessary, the Supplier can contact the Buyer to open the Purchase Order. When open, the Supplier may only submit a change to the following fields; Supplier Item, Quantity Ordered, Promised Date, and the Additional Change Requests field, the system will not allow a Price change.

Because the Purchase Order is fully matched it will not allow the Purchase Order to be canceled, even if the status has changed to open, because it is fully matched.

Closed for Invoicing - If the Purchase Order is partially matched, the status of the Purchase Order will be Closed for Invoicing. The Supplier may only submit a change to the following fields; Supplier Item, Quantity Ordered, Promised Date, and the Additional Change Requests field, the system will not allow a Price change.

Closed for Receiving – If the Purchase Order has been fully received against for a 3-Way Match Level Purchase Order (receiving required) or if the Purchase Order is a 2-Way Match Level Purchase Order with no receiving, the status of the Purchase Order will be open but the line status will show Closed for Receiving. When open, the Supplier can submit a change to the following fields: Supplier Item, Price, Quantity Ordered, Promised Date, and the Additional Change Requests field.

1. To submit a Purchase Order change click on the Orders tab.



The screenshot shows a navigation bar with five tabs: Home, Orders, Shipments, Admin, and Finance. The 'Orders' tab is circled in red. Below the navigation bar is a search area with a 'Search' label, a dropdown menu currently showing 'PO Number', an empty text input field, and a 'Go' button.

2. The default view is All Purchase Orders, click Go to display all Purchase Orders.

NOTE: Use the Advanced Search button to search for a particular Purchase Order.

The screenshot shows the 'Purchase Orders' interface. At the top, there are tabs for 'Purchase Orders', 'Agreements', 'Purchase History', and 'Work Confirmations'. Below the tabs, there are buttons for 'Multiple PO Change' and 'Export'. A 'Views' section contains a dropdown menu set to 'All Purchase Orders' and a 'Go' button. To the right of the 'Go' button, the 'Advanced Search' button is highlighted with a red arrow. Below the views section, there are buttons for 'Select Order: Acknowledge', 'Request Cancellation', 'Request Changes', and 'View Change History'. A pagination control shows 'Previous 1-25 Next 25'. The main table lists purchase orders with columns for PO Number, Operating Rev Unit, Document Type, Description, Order Date, Buyer, Currency, Amount, Status, and Acknowledge. Three rows are visible, all with a status of 'Open'.

3. Select the Purchase Order to change by enabling the radio button next to the number, and then click the Request Changes button.

This screenshot is similar to the previous one, but the 'Request Changes' button is now selected. In the table, the radio button next to the PO number '607076' is selected and highlighted with a red arrow. The 'Request Changes' button is also highlighted with a red arrow. The other PO numbers in the table are '607071' and '607241'.

NOTE: The Request Change option is available on Purchase Orders with a status of Open. This option is not available on Purchase Orders with the following statuses: Cancelled, Closed, Supplier Changes Pending or Purchase Orders that have already been received.

NOTE: If an item is no longer available for ordering within Progressive's catalog the system will prohibit changes to a Purchase Order with that item number.

4. Click the Show field to view all fields for each line(s).

The screenshot shows the 'PO Details' screen. It includes two tips: 'TIP You can cancel the entire order or specific lines.' and 'TIP Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes.' Below the tips are 'Show All' and 'Hide All' links. The main table has columns for 'Details Line Type', 'Item/Job Revision', 'Supplier Item', 'Description', 'UOM Qty', 'Price', 'Amount', 'Delivered', 'Billed', 'Note to Supplier', 'Contractor Name', 'Status', 'Global Agreement ID', and 'Supplier Config'. Three lines are shown, each with a 'Show' link highlighted by a red arrow. The first line is for an HP #82 Inkjet Black Ink cartridge, the second for a Canon BJC-620 (BJI-201C) Cyan cartridge, and the third for a Canon BJC-620 (BJI-201Y) Yellow Cartridge.

Changes can be made to the open fields, Price, Quantity, Promised Date and Supplier Item Number.

PO Details														
<p>✓ TIP You can cancel the entire order or specific lines. ✓ TIP Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes. Show All Hide All</p>														
Details Line Type	Item	Item Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement
Hide 1	Goods		CH565A	HP #82 InkJet Black Ink cartridge	EACH	3	36.68	110.04			QA TESTING DO NOT ORDER QA TESTING EBSQ04JP		Open	
Shipments														
Shipment	Ship-To Location	Quantity Ordered	Price	Quantity Received	Amount Received	Amount	Promised Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attac
1	OH1MAYF6300,N	3		4	146.72	110.04		30-Nov-2012 13:00:00					Closed For Receiving	

Price Purchase Order Change

- For price changes enter the new price in the Price field and a reason for the price change in the Reason field.

Item Job Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Supplier Config ID	Attachments	Reason
	CH565A	HP #82 InkJet Black Ink cartridge	EACH	3	35.00	110.04			QA TESTING DO NOT ORDER QA TESTING EBSQ04JP		Open				price decrease

- If additional changes are needed such as UOM or description, specify them in the Additional Change Requests field below before submitting the request.

Additional Change Requests
<p>If you need to submit more changes in addition to those that have been submitted above, you can specify them here</p> <p>Please change the UOM to Box</p>

- Click the Submit button. You will receive a Change Order Confirmation.

Purchase Orders | Agreements | Purchase History | Work Confirmations

Change Order Confirmation

Change Request for Purchase Order 607076 has been submitted for approval.

[Return to Purchase Order Summary](#)

The Purchase Order status has changed from Open to Supplier Change Pending.

Select Order:	Acknowledge	Request Cancellation	Request Changes	View Change History	Previous	1-25	Next	25		
PO Select Number	Operating Rev Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
607071	1 CORPORATE OU	Standard PO		10-Apr-2013 09:45:54	CAUNTER, CAROL	USD	1290.00	Open		
607076	1 CORPORATE OU	Standard PO		10-Apr-2013 09:45:11	CAUNTER, CAROL	USD	211.26	Supplier Change Pending		

Your change request has routed to the Progressive Buyer for review. The Buyer is able to accept or reject the change request. Once action has been taken, you will receive a response notification via email and the status of the Purchase Order will return to Open.

The subject line on the email will indicate:

FYI: Response to your change request for Standard PO 398767 (PO Number)

NOTE: If the Price, Quantity, Supplier Item and/or Promised Date change was accepted by the Buyer, a revised copy of the Purchase Order will automatically be sent to the Supplier, as long as they do not normally receive their Purchase Order's via OSN.

Quantity Purchase Order Change

- For quantity changes, enter the new quantity in the Quantity Ordered field and a reason for the quantity change in the Reason field. Choose Change from the Action drop down.

To tion	Quantity Ordered	Price	Quantity Received	Amount Received	Amount Promised	Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split Reason	Action
#AYF16300.N	2			1290.00			05-Dec-2012 00:00:00					Open		out of stock	Change

- Click the Submit button. You will receive a Change Order Confirmation.

Change Order Confirmation

Change Request for Purchase Order 607071 has been submitted for approval.

[Return to Purchase Order Summary](#)

The Purchase Order status has changed from Open to Supplier Change Pending

PO Select Number	Operating Rev Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
607071	1 CORPORATE OU	Standard PO		10-Apr-2013 09:45:54	CAUNTER, CAROL	USD	1290.00	Supplier Change Pending		

Your change request has routed to the Progressive Buyer for review. The Buyer is able to accept or reject the change request. Once action has been taken, you will receive a response notification via e-mail and the status of the Purchase Order will return to Open.

The subject line on the email will indicate:

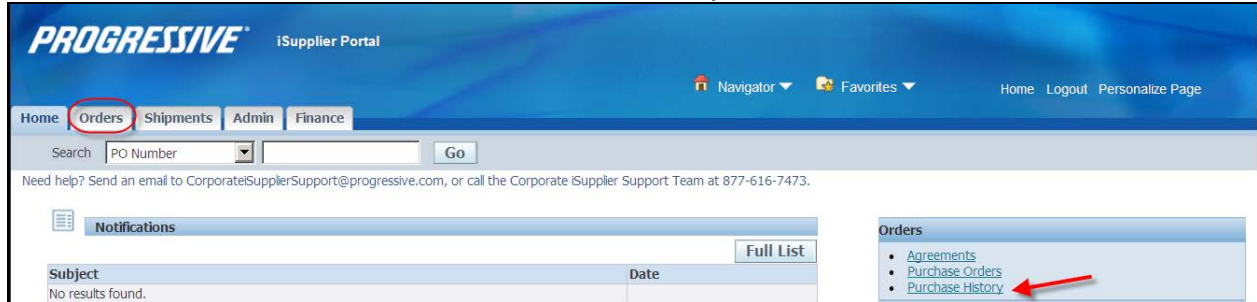
FYI: Response to your change request for Standard PO 398767 (PO Number)

NOTE: If the Price, Quantity, Supplier Item and/or Promised Date change was accepted by the Buyer, a revised copy of the Purchase Order will automatically be sent to the Supplier, as long as they do not normally receive their Purchase Order's via OSN.

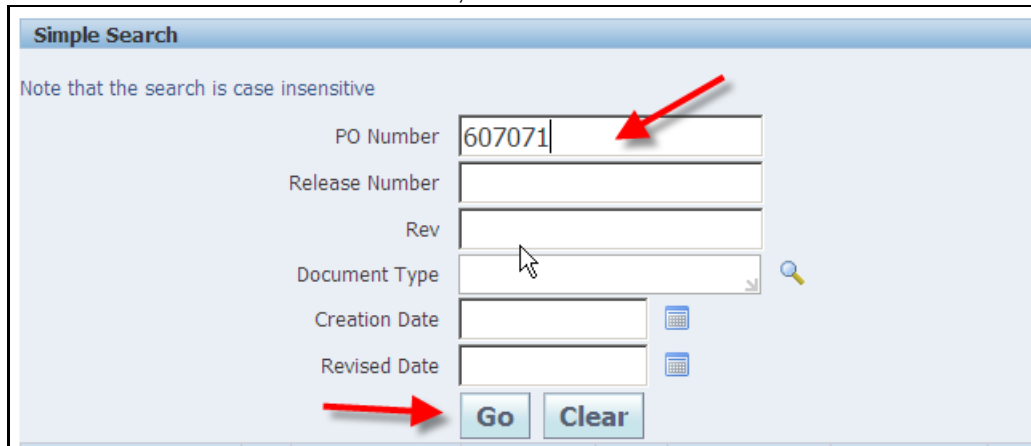
View Purchase Order Change History

View of Purchase Order Change History

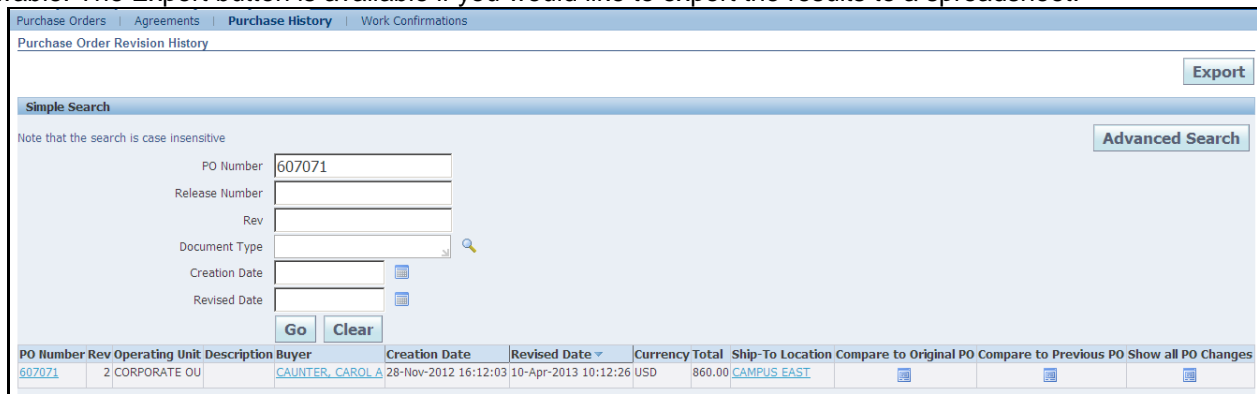
1. Click the Orders tab, and then click the Purchase History link.



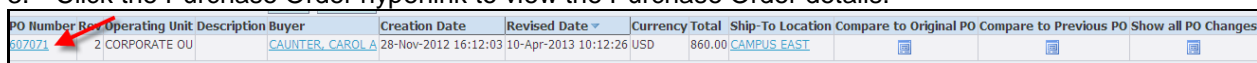
2. Enter the Purchase Order number, then click Go.



This view provides you with three options outlining the Purchase Order changes. Only approved changes will be viewable. The Export button is available if you would like to export the results to a spreadsheet.



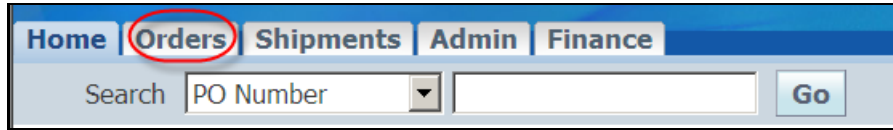
3. Click the Purchase Order hyperlink to view the Purchase Order details.



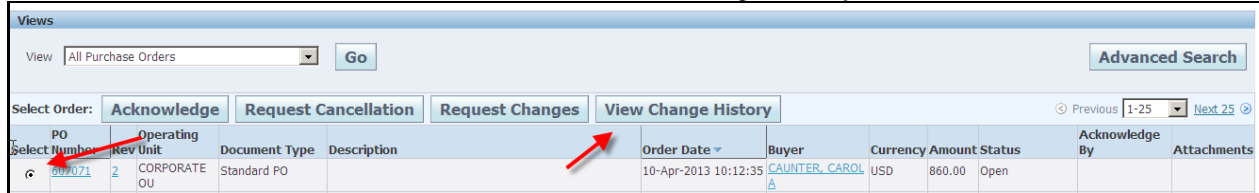
NOTE: This view will display those requests that have been approved and/or rejected. Scroll to the right to view additional fields (Additional Changes, Buyer Response, etc.)

View Purchase Order Changes

1. Click on the Orders tab.



2. Select a Purchase Order and then click on the View Change History button.



The star icon indicates the change submitted.



NOTE: This view will display those requests that have been approved and/or rejected.

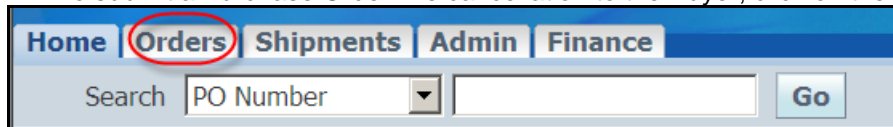
3. Click OK to return to previous screen.

Requesting Purchase Order Cancellations

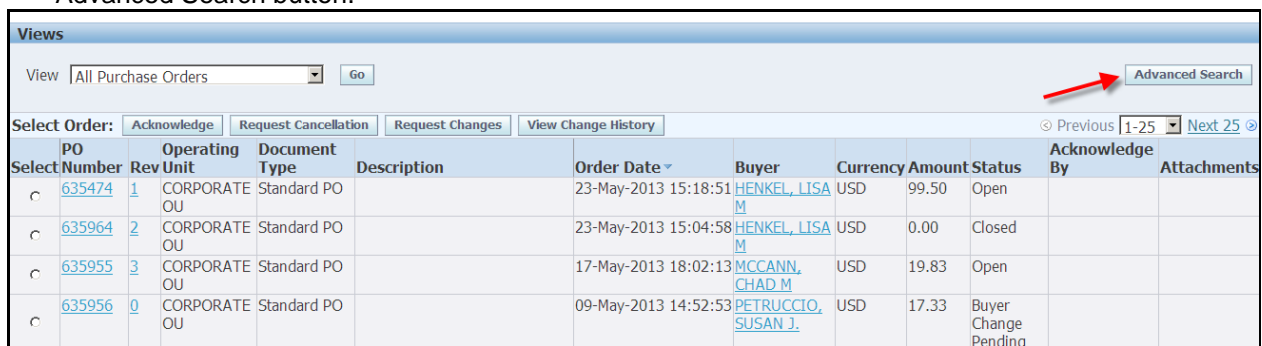
There may be instances where it is necessary to submit a request for cancellation of an entire Purchase Order or Purchase Order lines to the Buyer. When you request a cancellation of a Purchase Order or Purchase Orders lines, the request is submitted to the Buyer listed on the Purchase. If the Buyer approves the request the Purchase Order or Purchase Order lines will be cancelled.

Cancel Purchase Order Line

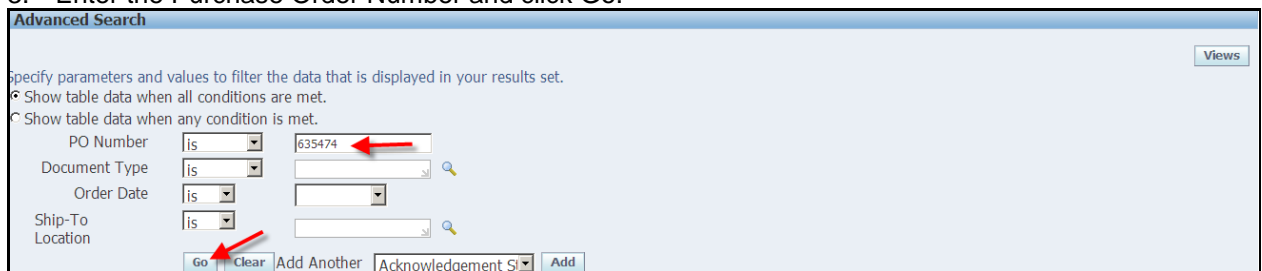
1. To submit a Purchase Order line cancellation to the Buyer, click on the Orders tab.



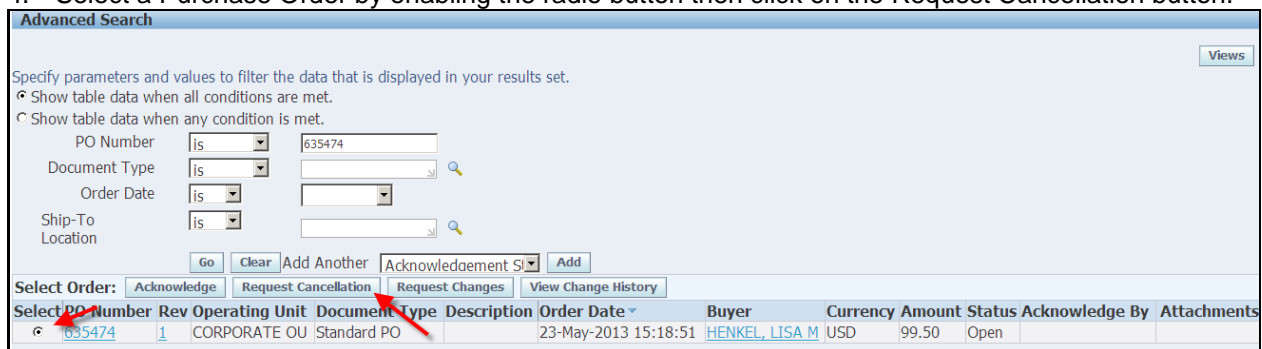
2. The default view will show all Purchase Orders. To search for a specific Purchase Order click on the Advanced Search button.



3. Enter the Purchase Order Number and click Go.



4. Select a Purchase Order by enabling the radio button then click on the Request Cancellation button.



NOTE: Before submitting the request for cancellation the Supplier needs to be aware that if there is an invoice already submitted and matched to the Purchase Order, the Buyer will be rejecting the request for the cancellation until a credit memo invoice is issued by the Supplier. Once the credit memo invoice is processed the Supplier can re-submit the cancellation request.

If an invoice and a credit have already been issued and matched, the Buyer will process the request for the cancellation of the Purchase Order.

If an invoice has not been submitted and matched to the Purchase Order, the Buyer will process the request for cancellation of the Purchase Order.

5. In the Purchase Order details click on the Show button to view all fields.

PO Details

✓ TIP You can cancel the entire order or specific lines.
 ✓ TIP Click on the Show link to view shipment details of a line.
[Show All](#) [Hide All](#)

Details	Line	Type	Item/Job	Revision	Item	Supplier	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Supplier Config ID	Attachments
Show	1	Goods			CAN 2973B001 OEM	Canon pixma pg 210XL black ink mp 240/250/270/280/MX 330/340/410/480 400p yld	EACH	5	19.9	99.50						Open			

Return to Orders: [Purchase Orders](#)

Buttons: Cancel, Printable View, View Change History, Export, Submit

6. Enter the reason for the cancelation in the open field and choose Cancel from the Action drop down box. Click on the Submit button.

PO Details

✓ TIP You can cancel the entire order or specific lines.
 ✓ TIP Click on the Show link to view shipment details of a line.
[Show All](#) [Hide All](#)

Details	Line	Type	Item/Job	Revision	Item	Supplier	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Supplier Config ID	Attachments	Reason
Hide	1	Goods			CAN 2973B001 OEM	Canon pixma pg 210XL black ink mp 240/250/270/280/MX 330/340/410/480 400p yld	EACH	5	19.9	99.50						Open				

Shipments

Ship-To	Location	Quantity Ordered	Price	Quantity Received	Amount Received	Amount Date	Promised	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split Reason	Action
1	CA1THOUS2545.H	5	19.9				99.50	28-Feb-2013 00:00:00					Open		customer cd r	Cancel

Return to Orders: [Purchase Orders](#)

Buttons: Cancel, Cancel Entire Order, Printable View, View Change History, Export, Submit

7. A confirmation message will display that the cancellation request has been submitted for approval to the Buyer. Once the Buyer accepts (or rejects) the request the Supplier will be notified.

Home | Orders | Shipments | Admin | Finance

Create Invoices | View Invoices | View Payments

Cancel Order Confirmation

Cancellation Request for Purchase Order 635474 has been submitted for approval.

[Return to Purchase Order Summary](#)

Cancel Entire Purchase Order

1. To submit a Purchase Order cancellation to the Buyer, click on the Orders tab.

Home **Orders** Shipments Admin Finance

Search PO Number Go

2. The default view will show all Purchase Orders. To search for a specific Purchase Order click on the Advanced Search button.

Views

View All Purchase Orders Go

Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	636588	0	CORPORATE OU	Standard PO		28-Jun-2013 14:22:18	PETRUCCIO, SUSAN J.	USD	25.00	Open		
<input type="radio"/>	636587	0	CORPORATE OU	Standard PO		28-Jun-2013 14:07:31	PETRUCCIO, SUSAN J.	USD	15.00	Open		
<input type="radio"/>	636570	0	CORPORATE OU	Standard PO		28-Jun-2013 13:43:02	CAUNTER, CAROL A	USD	21.00	Open		
<input type="radio"/>	636566	0	CORPORATE OU	Standard PO		28-Jun-2013 13:40:19	PETRUCCIO, SUSAN J.	USD	10.00	Open		
<input type="radio"/>	636565	0	CORPORATE OU	Standard PO		28-Jun-2013 13:40:16	CAUNTER, CAROL A	USD	3.50	Open		
<input type="radio"/>	636557	0	CORPORATE OU	Standard PO		28-Jun-2013 13:26:42	PETRUCCIO, SUSAN J.	USD	49.95	Open		
<input type="radio"/>	636556	0	CORPORATE OU	Standard PO		28-Jun-2013 13:23:53	PETRUCCIO, SUSAN J.	USD	5.00	Open		

3. Enter the Purchase Order Number and click Go.

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.

Show table data when any condition is met.

PO Number is

Document Type is

Order Date is

Ship-To Location is

Go Clear Add Another Acknowledgement Status Add

4. Select a Purchase Order by enabling the radio button then click on the Request Cancellation button.

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.

Show table data when any condition is met.

PO Number is

Document Type is

Order Date is

Ship-To Location is

Go Clear Add Another Acknowledgement Status Add

Select Order: Acknowledge Request Cancellation Request Changes View Change History

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input checked="" type="radio"/>	636402	0	CORPORATE OU	Standard PO		11-Jun-2013 13:46:14	PETRUCCIO, SUSAN J.	USD	46.00	Open		

NOTE: Before submitting the request for cancellation the Supplier needs to be aware that if there is an invoice already submitted and matched to the Purchase Order, the Buyer will be rejecting the request for the cancellation until a credit memo invoice is issued by the Supplier. Once the credit memo invoice is processed the Supplier can re-submit the cancellation request.

If an invoice and a credit have already been issued and matched, the Buyer will process the request for the cancellation of the Purchase Order.

If an invoice has not been submitted and matched to the Purchase Order, the Buyer will process the request for cancellation of the Purchase Order.

5. Click on the Cancel Entire Order button.

Request Cancellation for Standard Purchase Order : 636402.0 (Total USD 46.00)
 Currency=USD

Order Information

General Information		Terms and Conditions		Related Information Receipts Invoices Payments
Total	46.00	Payment Terms	NET 30	
Supplier	APPLIED LASER TECHNOLOGIES	Carrier	BEST WAY	
Supplier Site	ISP-PO BOX 7617	FOB	DESTINATION	
Address	PO BOX 76173 CLEVELAND, OH 44101	Freight Terms		
Buyer	PETRUCCIO, SUSAN J.	Shipping Control		
Order Date	11-Jun-2013 13:46:14	Ship-To Address		
Description	Open	Address	625 ALPHA DR HIGHLAND HEIGHTS, OH 44143-2114	
Status	Open	Bill-To Address		
Note to Supplier		Address	ATTENTION: ACCOUNTS PAYABLE P O BOX 94568 CLEVELAND, OH 44101	
Sourcing Document				
Organization	CORPORATE OU			
Supplier Order Number				
Attachments	None			

PO Details

TIP You can cancel the entire order or specific lines.
 TIP Click on the Show link to view shipment details of a line.
[Show All](#) [Hide All](#)

Details	Line Type	Item	Supplier	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement ID	Supplier Config	Attachments	Reason
Show 4	Goods		SAM SCXD4200 COM	Samsung compatible SCX42 supertoner (SCXD4200A) samsung SCX 4200 3k yld	EACH	1	46	46.00			NTS...NTS...NTS		Open	635863			

6. Enter a reason in the Reason for Cancellation box and then click on the Submit button.

Cancel Purchase Order 636402

Description
 Currency USD
 Amount 46.00
 Order Date 11-Jun-2013 13:46:14
 Action Cancel

* Reason for Cancellation

Customer cd to cancel order.

7. A confirmation message will display that the cancellation request has been submitted for approval to the Buyer. Once the Buyer accepts (or rejects) the request the Supplier will be notified.

Home | Orders | Shipments | Admin | Finance

Purchase Orders | Agreements | Purchase History

Cancel Order Confirmation

Cancellation Request for Purchase Order 636402 has been submitted for approval.

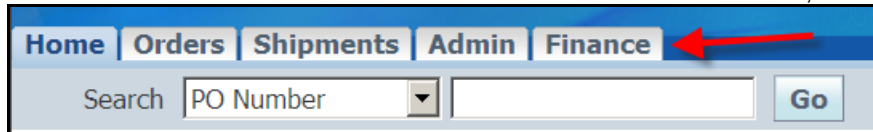
[Return to Purchase Order Summary](#)

Submitting Invoices

iSupplier allows you to create and submit standard invoices and credit memo invoices to Progressive electronically. The system will not allow any instances of overbilling against a Purchase Order on either the price or the quantity ordered.

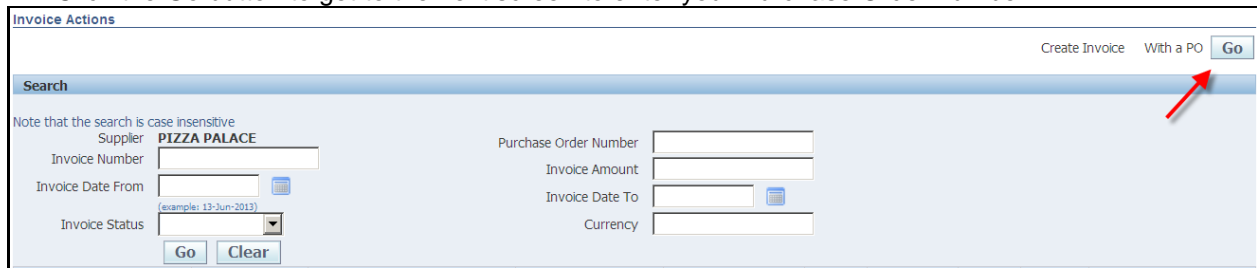
If it is necessary to invoice Progressive for more than what the Purchase Order states you must submit a Purchase Order change request through the iSupplier application prior to entering the invoice in the system. See the Purchase Order Changes section in this manual.

1. To create and submit a standard invoice or credit memo invoice, start by clicking on the Finance tab.



The screenshot shows a navigation bar with five tabs: Home, Orders, Shipments, Admin, and Finance. The Finance tab is highlighted in blue and has a red arrow pointing to it. Below the tabs is a search area with a dropdown menu set to 'PO Number', a text input field, and a 'Go' button.

2. Click the Go button to get to the next screen to enter your Purchase Order number.

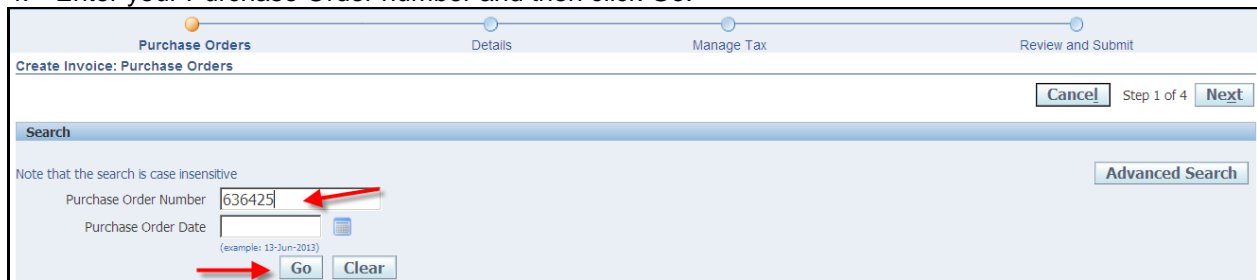


The screenshot shows the 'Invoice Actions' screen. At the top right, there are buttons for 'Create Invoice', 'With a PO', and 'Go'. A red arrow points to the 'Go' button. Below this is a search bar. The main area contains a note: 'Note that the search is case insensitive'. There are several input fields: 'Supplier' (PIZZA PALACE), 'Purchase Order Number', 'Invoice Number', 'Invoice Amount', 'Invoice Date From', 'Invoice Date To', 'Invoice Status', and 'Currency'. There are 'Go' and 'Clear' buttons at the bottom left.

3. The invoices screen will display providing you with the four step process:

- Purchase Orders
- Details
- Manage Tax
- Review and Submit

4. Enter your Purchase Order number and then click Go.



The screenshot shows the 'Create Invoice: Purchase Orders' screen. At the top, there is a progress bar with four steps: Purchase Orders, Details, Manage Tax, and Review and Submit. The 'Purchase Orders' step is active. Below the progress bar, there are 'Cancel' and 'Next' buttons, with 'Step 1 of 4' in between. The main area contains a search bar. There is a note: 'Note that the search is case insensitive'. There are two input fields: 'Purchase Order Number' (containing '636425') and 'Purchase Order Date'. There are 'Go' and 'Clear' buttons at the bottom left. A red arrow points to the 'Go' button.

NOTE: An Invoice can be created using multiple Purchase Orders. To do this you must search for Purchase Orders by the Purchase Order date and select all the Purchase Orders to add to the invoice. Progressive recommends that if there is sales tax applicable for each of Purchase Orders that you submit separate invoices for each Purchase Order as there is only one sales tax line available for input. This means sales tax would need to be combined as one total and we do not recommend entering a combined sales tax.

5. Select the Purchase Order to add to the invoice and then click the next button or click on the Add to Invoice button after selecting.

Note that the search is case insensitive Advanced Search

Purchase Order Number:

Purchase Order Date:
(example: 13-Jun-2013)

Select Items:

Select All | Select None

Select	Number	Line	Shipment	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	636425	1	1	TEST	859886	25	0	0	EACH	2	USD	SEE BELOW	CORPORATE OU		

Step 1 of 4

6. Click on magnifying icon at the end of the Remit To field.

Create Invoice: Details Step 2 of 4

* Indicates required field

Supplier

* Supplier: PIZZA PALACE
 Tax Payer ID: 342355785

* Remit To:

Address:

Remit To Bank Account:

Invoice

* Invoice Number:

* Invoice Date: 13-Jun-2013

Invoice Type: Invoice

Currency: USD

Invoice Description:

Attachment: None

7. The Search and Select screen will open. Click the Go button to populate a list of your Supplier Remit To addresses. Quick Select the correct Remit To address or enable the Select radio button and then click on the Select button on the right.

Search and Select: Remit To

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Remit To

Results

Select	Quick Select	Supplier	Remit To	Address	Organization
<input type="radio"/>	<input type="button" value="Quick Select"/>	PIZZA PALACE	4545 MUSHROOM R	4545 MUSHROOM RD SAUCY OH 45654	CORPORATE OU
<input type="radio"/>	<input type="button" value="Quick Select"/>	PIZZA PALACE	8989 PEPPERONI	8989 PEPPERONI ST CHEESE OH 44555	CORPORATE OU

[About this Page](#)

The correct Remit To address will populate.

8. Enter the Invoice Number and an Invoice Description.

NOTE: If your Supplier profile is set-up to be paid by draft, skip this step.

The screenshot shows two panels: 'Supplier' and 'Invoice'.
Supplier Panel:
 * Supplier: PIZZA PALACE
 Tax Payer ID: 342355785
 * Remit To: 8989 PEPPERONI
 Address: 8989 PEPPERONI ST CHEESE OH 44555
 Remit To Bank Account: [empty]
Invoice Panel:
 * Invoice Number: 96333
 * Invoice Date: 01-Aug-2013 (example: 17-Jul-2013)
 Invoice Type: Invoice
 Currency: USD
 Invoice Description: Test for Supplier Invoices
 Attachment: None Add...

NOTE: If the invoice submitted will be a Credit, choose Credit Memo from the Invoice Type drop down box. You will enter a negative value using a hyphen in the Quantity field.

iSupplier will only allow you to create a credit memo invoice against a Purchase Order that is partially or not received. If the Purchase Order you need to create your credit memo invoice against will not allow you to create there is a high probability the Purchase Order is fully received. The iSupplier system will not allow you to create a credit memo invoice against a fully received Purchase Order.

In this circumstance contact the Buyer listed on the Purchase Order by submitting a change request for that Purchase Order, you must request the Buyer to initiate a return of receipts against the Purchase Order in order for you to proceed with entering the credit invoice. Once you receive the approval from the Buyer that the return of receipts has been processed you may proceed with creating the credit memo.

9. At times it may be necessary for the Supplier to submit corresponding documentation such as an Excel or Word file with additional invoice details in addition to the actual invoice. Additional text verbiage can also be submitted in lieu of a file. To do this click on the Add button.

The screenshot shows the 'Invoice' form with the following fields:
 * Invoice Number: [empty]
 * Invoice Date: 18-Jun-2013 (example: 18-Jun-2013)
 Invoice Type: Invoice
 Currency: USD
 Invoice Description: [empty]
 Attachment: None Add...
 A red arrow points to the 'Add...' button.

10. Type a title in the Title field and add a description in the Description field.
11. If you are attaching a file, enable File button for the Type and click on the Browse button. Search for the correct file and click on it then click on Open in the dialog box.
12. If you are just submitting a message you may change the Type to Text and type your message in the open field.
13. In either instance click the Apply button.

NOTE: If you do not have anything to attach you should skip these steps.

Attachment Summary Information

Title: Additional Invoice Details
 Description: Additional invoice details for invoice #96333
 Category: From Supplier

Define Attachment

Type: File URL Text

File path: C:\Documents and Settings\LHENKEL1\Desktop\Additi Browse...
 Description: [Empty text area]

Buttons: Cancel Add Another Apply

14. A confirmation message will display that your attachment has been added successfully and the Attachment section will now show an attachment listed.

Confirmation

Attachment Additional Invoice Details has been added successfully but not committed; it would be committed when you commit the rest of the current transaction.

Create Invoice: Details

* Indicates required field

Buttons: Cancel Back Step 2 of 4 Next

Supplier				Invoice			
* Supplier	A1 AIR VENT	* Invoice Number	[Empty]	* Invoice Date	18-Jun-2013	Invoice Type	Invoice
Tax Payer ID	157606157	Invoice Description	[Empty]	Currency	USD	Attachment	Attachment List... Add...
* Remit To	[Empty]						
Address	[Empty]						
Remit To Bank Account	[Empty]						

15. Scroll down to Items. If it is necessary to modify the invoiced quantity, enter the new quantity in the Quantity field at the bottom of the page.

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Quantity	Quantity	Unit Price	UOM	Amount
636425	1	1	TEST	B59886	SEE BELOW	25	25	2	EACH	50

16. If it is necessary to add Freight or a Miscellaneous charge, click on the Add Row button to populate those charge fields. Add the dollar amount of the charge and a description. Add as many rows as necessary. Click on the Next button.

Shipping and Handling

Charge Type	Amount	Description
Freight	5.00	Delivery
Add Row		

Buttons: Cancel Back Step 2 of 4 Next

17. To calculate tax on the invoice, enter the tax amount in the Summary Tax Lines section in the Active field then click on the Calculate button.

Summary Tax Line Number	Tax Rate Code	Tax Rate	Tax Amount	Line Status
1	TAX_ISP_REGIME	TAX_ISP	TAX_ISP_STATUS	TAX_ISP_JURISDICTION TAX_ISP_RATE 1

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
636425	1	1	TEST	B59886	SEE BELOW	25	25.00 EACH	2.00	50.00

Charge Type	Amount Description
Freight	5.00 Delivery

Invoice Summary	Amount
Items	50.00
Less Retainage	0.00
Freight	5.00
Miscellaneous	0.00
Tax	0.00

NOTE: The field will automatically default to 0 (zero). If no tax is to be entered in the field leave defaulted to 0 (zero).

18. After you have entered the tax amount and clicked on the Calculate button, click on the Recalculate Total button.

Invoice Summary	Amount
Items	50.00
Less Retainage	0.00
Freight	5.00
Miscellaneous	0.00
Tax	0.00
Total (USD)	55.00

19. Review the invoice total. If all amounts are correct, click on the Submit button.

NOTE: If you only save the invoice and come back to it at a later date, the tax amount does not save it will reset to zero.

Invoice Summary	Amount
Items	50.00
Less Retainage	0.00
Freight	5.00
Miscellaneous	0.00
Tax	2.50
Total (USD)	57.50

Buttons: Cancel, Save, Back, Step 3 of 4, Next, Submit

20. A confirmation notice will display that your invoice was submitted to our Accounts Payable department for processing.

Confirmation
 Invoice 96333 was submitted to our Accounts Payable department on 13-Jun-2013. The confirmation number for this invoice is the invoice number. You can query its status by using Search by navigating to the Home page.

View Invoice Status

1. Click on the Home tab. Then click on the Invoices hyperlink.

The screenshot shows the iSupplier Portal interface. At the top, there are navigation tabs: Home, Orders, Shipments, Admin, and Finance. Below these is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. A message asks for help, providing an email and phone number. The main content area has several sections: 'Notifications' (with a 'Full List' button), 'Orders At A Glance' (with a table of PO numbers, descriptions, and order dates), and a right-hand sidebar with categories: Orders (Agreements, Purchase Orders, Purchase History), Shipments (Overdue Receipts, Receipts), and Finance (Invoices, Payments). A red arrow points to the 'Invoices' link in the Finance section.

2. Enter your Invoice number search criteria. To return all invoices, enter the % (wildcard) in the Invoice Number field and click Go.

The screenshot shows the 'Simple Search' form. It has several input fields: 'Invoice Number' (containing '60246'), 'PO Number', 'Payment Number', and 'Payment Status' (a dropdown menu). There are also date range fields for 'Amount Due From', 'Invoice Date From', and 'Due Date From'. A 'Go' button and a 'Clear' button are at the bottom left. A red arrow points to the 'Go' button. An 'Advanced Search' button is at the top right.

The view provides you with the Payment Status, Due Date & Payment Number if applicable at the time, etc.

NOTE: Click on the hyperlinks Invoice Number or Due Date to view additional details. The Export option is available and allows the export of information within the view.

The screenshot shows the search results page. It features the same search form as above. Below the form is a table with the following data:

Invoice Number	Description	Invoice Date	Type	Currency	Amount Due	Status	On Hold	Payment Status	Due Date	Payment Number	PO	Receipt Attachments
60246		25-Jun-2012	Standard	USD	0.00	Approved		Paid	25-JUL-2012 00:00:00	820655747584224		

An 'Export' button is located at the bottom right of the table area.

Other Invoice Search Options

Purchase Order - To view the invoice related to a particular Purchase Order, enter the Purchase Order Number. If you do not know the number, enter the % (wildcard) in the Purchase Order Number field.

Payment Status - Statuses include: Not Paid, Partially Paid and Paid.

Invoice Date Range - Enter a single date or a start and end date.

View Payment

1. Click on the Home tab. Then click on the Payments hyperlink.

The screenshot shows the iSupplier Portal interface. At the top, there are navigation tabs: Home, Orders, Shipments, Admin, and Finance. Below these is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. A message below the search bar reads: 'Need help? Send an email to CorporateSupplierSupport@progressive.com, or call the Corporate iSupplier Support Team at 877-616-7473.' The main content area is divided into sections: 'Notifications' (with a 'Full List' button), 'Orders At A Glance' (with a 'Full List' button), and a table of orders. On the right side, there are three main sections: 'Orders' (with links for Agreements, Purchase Orders, and Purchase History), 'Shipments' (with a link for Overdue Receipts), and 'Finance' (with links for Invoices and Payments). A red arrow points to the 'Payments' link in the Finance section.

2. Enter your search criteria. To return all payments, enter the % (wildcard) in the Payment Number field and click Go.

The screenshot shows the 'Simple Search' form. It includes a note: 'Note that the search is case insensitive'. There are several input fields: 'Payment Number' (containing '%'), 'Invoice Number', 'PO Number', 'Status', 'Payment Amount From' (with a 'To' field), and 'Payment Date From' (with a 'To' field and an example date '15-Mar-2013'). There are 'Go' and 'Clear' buttons at the bottom left, and an 'Advanced Search' button at the top right. A red arrow points to the '%' in the 'Payment Number' field, and another red arrow points to the 'Go' button.

The view provides you with the Payment Date, Amount & Status, etc.

NOTE: Click on the hyperlinks Payment or Invoice to view additional details. The Export option is available and allows the export of information within the view.

The screenshot shows the search results page. It features a table with the following columns: Payment, Payment Date, Currency, Amount, Method, Status, Status Date, Bank Account, Invoice, and PO Number. The table contains several rows of data. Below the table is an 'Export' button. The search form at the top is still visible, with the 'Payment Number' field containing '%'. A red arrow points to the '%' in the search form.

Payment	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
650132357	29-May-2010	USD	8.10	Draft	Voided	29-May-2010	AS3 US General Draft Acct	SMOKETESTSD052910	415143
650130362	07-Nov-2009	USD	1.00	Draft	Voided	07-Nov-2009	AS3 US General Draft Acct	CMPPRODMSMOKETESTSDONATEL110709	
650130255	24-Oct-2009	USD	2.00	Draft	Voided	24-Oct-2009	AS3 US General Draft Acct	SDONATELIPRODMSMOKETEST1	
650128602	16-May-2009	USD	2.00	Draft	Voided	16-May-2009	AS3 US General Draft Acct	UTE8 PROD SMOKE TEST 1 LSEESE	
650128324	25-Apr-2009	USD	2.00	Draft	Voided	25-Apr-2009	AS3 US General Draft Acct	PRODUCTION SMOKE TEST 042509	
650128325	25-Apr-2009	USD	2.00	Draft	Voided	25-Apr-2009	AS3 US General Draft Acct	PRODUCTION SMOKE TEST 2 042509	
650123714	10-May-2008	USD	5.00	Draft	Voided	10-May-2008	AS3 US General Draft Acct	PRODTSTA-SOURC/CONTR-SEESE	
650120762	14-Oct-2007	USD	0.01	Draft	Voided	14-Oct-2007	AS3 US General Draft Acct	SID101407	

Other Payment Search Options

Purchase Order - To view the payment related to a particular Purchase Order, enter the Purchase Order Number. If you do not know the number, enter the % (wildcard) in the Purchase Order Number field.

Payment Amount Range - Enter a single amount or an amount range.

Payment Date Range - Enter a single date or a start and end date.

Payment Hold Status Definitions

1. Clicking on the Home tab then the Invoices link allows you to pull back a list of all invoices.

The screenshot shows the iSupplier Portal interface. At the top, there's a navigation bar with 'Home', 'Orders', 'Shipments', 'Admin', and 'Finance'. Below this is a search bar for 'PO Number' and a 'Go' button. A notification area is visible, followed by an 'Orders At A Glance' table listing PO numbers, descriptions, and order dates. On the right, a sidebar menu includes 'Orders', 'Shipments', and 'Finance'. Under 'Finance', the 'Invoices' link is highlighted with a red arrow.

2. Enter the wildcard (%) in the Invoice Number field to pull back a list of all invoices, regardless of status.

The screenshot shows the 'Simple Search' form. The 'Invoice Number' field contains a '%' symbol, with a red arrow pointing to it. Other fields include 'PO Number', 'Payment Number', and 'Payment Status'. There are also date range fields for 'Amount Due From', 'Invoice Date From', and 'Due Date From'. A 'Go' button is highlighted with a red arrow, and a 'Clear' button is next to it.

3. In some instances you may see that invoices are On Hold. Click the On Hold hyperlink to view the hold reason.

Invoice Number	Description	Invoice Date	Type	Currency	Amount Due	Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
QA_EBSQ05_REC_01		07-Jan-2013	Standard	USD	27.01	In-Process	Qty Rec	Not Paid	06-FEB-2013 00:00:00		607122		
APPLSR01		04-Jan-2013	Standard	USD	80.00	Approved		Not Paid	03-FEB-2013 00:00:00		607131		
REC_TC_1.6.B		07-Dec-2012	Standard	USD	62.80	Approved		Not Paid	06-JAN-2013 00:00:00				
REC_TC_1.6 Inv Mtch		05-Dec-2012	Standard	USD	135.62	Approved		Not Paid	04-JAN-2013 00:00:00		607060		
89148		26-Oct-2012	Standard	USD	0.00	Approved		Paid	25-NOV-2012 09:00:00	820662725	601634		
70511		09-Oct-2012	Standard	USD	370.32	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605453		
70545		09-Oct-2012	Standard	USD	128.34	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605366		
70613		09-Oct-2012	Standard	USD	92.00	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605660		
70548		09-Oct-2012	Standard	USD	250.00	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605179		
70547		09-Oct-2012	Standard	USD	468.71	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605407		
70546		09-Oct-2012	Standard	USD	106.95	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605412		
70550		09-Oct-2012	Standard	USD	0.00	Approved		Paid	08-NOV-2012 00:00:00	820662725	604948		
70609		09-Oct-2012	Standard	USD	112.17	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605758		
70622		09-Oct-2012	Standard	USD	51.00	In-Process	Qty Rec	Not Paid	08-NOV-2012 00:00:00		605698		
70549		09-Oct-2012	Standard	USD	0.00	Approved		Paid	08-NOV-2012 00:00:00	820662725	605273		

4. If you have questions regarding the Hold status on an invoice, please contact the Buyer indicated on the Purchase Order.

Standard Invoice: 70442 (Total USD 48.00)
Currency=USD

General	Amount Summary	Payment Information
Invoice Date: 08-Oct-2012	Item: 48.00	Paid: 0.00
Status: In-Process	Freight: 0.00	Discount Taken: 0.00
On Hold: Qty Rec	Miscellaneous: 0.00	Due: 48.00
Attachments: None	Tax: 0.00	Status: Not Paid
Supplier: [Redacted]	Prepayment: 0.00	Payment Date:
Supplier Site: ISP-PO BOX 7617	Retainage: 0.00	Payment:
Address: PO BOX 76173	Withholding Tax: 0.00	Term: NET 30
CLEVELAND, OH 44101	Total: 48.00	

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
QTY REC	Quantity billed exceeds quantity received	10-Oct-2012			

Below are the three most common Invoice Hold Statuses and Definition:

Price – The invoice price exceeds the Purchase Order price. The invoice will remain on hold until it is determined what action should be taken.

Quantity Received – The quantity invoiced exceeds the quantity received on the Purchase Order. You will see this hold when the customer has not gone into the system and indicated receipt of goods/services. The invoice will remain on hold until proper receiving is done.

Quantity Ordered – The quantity invoiced exceeds the quantity received on the Purchase Order. The invoice will remain on hold until it is determined what action should be taken.

Invoice Hold Review

1. Click on the Finance Tab.
2. Click on View Invoices.
3. Go to Payment Status and select Not Paid.
4. Click on the Hold Name hyperlink associated with the Invoice.

The screenshot shows the 'View Invoices' interface. The 'Payment Status' dropdown is set to 'Not Paid'. Below the search filters, a table lists several invoices. A red arrow points to the 'On Hold' column for the invoice with ID 800040814820150814.

Invoice Number	Description	Invoice Date	Type	Currency	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt Attachments
800040814820150814		15-Aug-2015	Standard	USD	226.36 In-Process Qty 0/0		Not Paid	25-AUG-2015 00:00:00		827208	
800028517820150812		14-Aug-2015	Standard	USD	285.67 In-Process Qty 0/0		Not Paid	24-AUG-2015 00:00:00		827012	
800021128520150811		12-Aug-2015	Standard	USD	417.82 In-Process Qty 0/0		Not Paid	22-AUG-2015 00:00:00		827050	
800024378820150805		06-Aug-2015	Standard	USD	14.69 In-Process Qty 0/0		Not Paid	16-AUG-2015 00:00:00		827475	
800014488701508720		31-Jul-2015	Standard	USD	3,027.69 In-Process Qty 0/0	170_SYSTEMS_HOLD	Not Paid	31-AUG-2015 00:00:00			
					63.81 In-Process Qty 0/0		Not Paid	10-AUG-2015 00:00:00		827279	

5. The Invoice Details screen will display in the Hold Reasons tab.
6. Review the Hold Reasons – Each individual Qty. Order or Price Hold appearing in the Hold Name is associated with an individual invoice Item line.
7. Click on the Invoice Lines tab.

The screenshot shows the 'Invoice Details' screen for invoice 800040814820150814. The 'Hold Reasons' tab is selected, displaying a table of hold reasons for the invoice lines.

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
170_SYSTEMS_HOLD	Awaiting Workflow Completion	16-Aug-2015	170_SYSTEMS_RELEASE	170_SYSTEMS_RELEASE	16-Aug-2015
QTY ORD	Quantity billed exceeds quantity ordered	16-Aug-2015			
QTY ORD	Quantity billed exceeds quantity ordered	16-Aug-2015			

8. Review the Item lines; PO Line Number and Qty. billed.

9. Click on the PO hyperlink

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Freight					0.00	0.00	0.00	Approved					
2	Item	Quality Park - Tyvek Catalog Envelopes - White, 9 x 12 , Lightweight, 100/Box	3	BOX	27.90		83.70	0.00	Approved	822799	8	1	CAUNTER, CAROL A	
3	Item	Boise - X-9 Multi-Use Copy Paper - 8-1/2 x 11 , White, 92, 20 lb	5	CARTON	25.97		129.85	0.00	Approved	822799	6	1	CAUNTER, CAROL A	
4	Tax					12.81		0.00	Approved					

10. The PO will open up, go down to the PO Line number in question and click on the Show hyperlink.

11. The Qty. Ordered and the Qty. Invoiced will display.

12. If the Qty. Invoiced is > the Qty. Ordered = Qty. Order Hold.

13. If the Qty. Invoiced is = the Qty. Ordered but the Invoiced Amount is > the Amount Ordered = Price Hold

14. Click on the Invoiced hyperlink which will then display all the invoices matched to that particular line of the PO.

Shipments		Qty		Amount		Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
Shipment	Ship-To Location	Ordered	Received	Invoiced	Ordered	Received	Invoiced	Promised Date				
1	MILTRCVJ46.H	3		0	83.70	167.40	167.40	12-Aug-2015 00:00:00	Partially Paid		Closed	
9												

15. The next screen will display all the invoice information associated with the particular PO Line including the Hold status of the invoice.

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
000040814620150814	15-Aug-2015	Standard	USD	226.36	226.36 In-Process	Qty Ord	Not Paid	25-AUG-2015 00:00:00		823798		
000027258220150900	07-Aug-2015	Standard	USD	327.12	0.00 Approved		Paid	17-AUG-2015 00:00:00	820250764	823798		

16. The Qty. was over matched against the PO Line. You can then look at the other invoice(s) matched to the PO Line and determine the reason for the overbilling e.g.; duplicate billing, matched to incorrect PO Line Number.

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Freight						0.00	0.00	Approved					
2	Item	Kimberly-Clark - Kleenex Facial Tissue - Signal Feature - Boutique Box - Soft, 2-Ply, 95 Sheets, 6/Pack	1	PACKAGE	7.92		7.92	0.00	Approved	823798	5	1	CAUNTER, CAROL A	
3	Item	Quality Park - Tyvek Catalog Envelopes - White, 10 x 13 , Lightweight, 100/Box	1	BOX	32.72		32.72	0.00	Approved	823798	9	1	CAUNTER, CAROL A	
4	Item	Quality Park - Tyvek Catalog Envelopes - White, 9 x 12 , Lightweight, 100/Box	3	BOX	27.90		83.70	0.00	Approved	823798	8	1	CAUNTER, CAROL A	
5	Item	Boise - X-9 Multi-Use Copy Paper - 8-1/2 x 11 , White, 92, 20 lb	5	CARTON	25.97		129.85	0.00	Approved	823798	6	1	CAUNTER, CAROL A	
6	Item	Disco - Heavy Medium-Weight White Tableware - White, Spoon, Medium, 100/Pack	1	BOX	1.74		1.74	0.00	Approved	823798	2	1	CAUNTER, CAROL A	
7	Item	Marcal - Small Steps Luncheon Napkins - White, 6-1/4 x 5-3/4 , Luncheon, 400/Pack	1	PACKAGE	2.99		2.99	0.00	Approved	823798	3	1	CAUNTER, CAROL A	
8	Item	Georgia-Pacific - Preference Paper Towels - Perforated, 2-Ply, 8-3/4 x 11 , 30/Pack	1	CARTON	25.84		25.84	0.00	Approved	823798	4	1	CAUNTER, CAROL A	
9	Item	Avery - White Easy Peel Address Labels - White, 1-1/3 x 4 , Address, 1400/Box	1	BOX	23.84		23.84	0.00	Approved	823798	1	1	CAUNTER, CAROL A	
10	Tax						18.52	0.00	Approved					

17. At any point in the process you can click on the Export button which will then export the details of your current view to an Excel spreadsheet.

Supplier Entry of Banking Information

Follow the steps below to enter your banking information. To enter banking information you must have the Corp ISP Manager Responsibility. This responsibility allows you to edit/view banking information. Bank Accounts should always be associated to a specific address. If you need to add banking information to multiple sites, use the process Add Bank to Address Using Existing Bank and repeat the steps for each of your addresses.

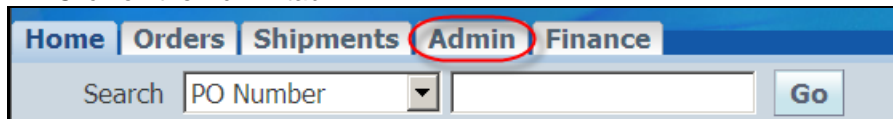
Entering a New Bank Account

Entering banking information includes entering your bank routing number and your bank account number along with other specific information related to your account. Bank routing numbers are always 9 digits long and start with 0, 1, 2 or 3. Routing numbers are universal and are shared by different customers affiliated with the same bank. The routing number you enter may be an existing routing number within Progressive’s system that is being used across other Suppliers who bank at the same Financial Institution.

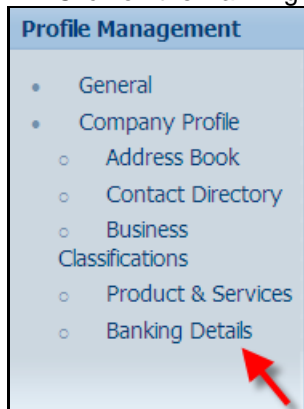
Routing Number Exists

In order to add your bank account for a specific address you must first determine if the routing number is already listed within Progressive’s system. The following steps will show an example of how to set up your bank account information if the Routing number already exists and what to do if the Routing Number does not exist within Progressive’s system.

1. Click on the Admin tab.



2. Click on the Banking Details link.



3. **Important Step** - Choose All Assignments from the drop down View box and then click Go. This step will allow you to associate your banking information to your individual addresses.

Banking Details			
View	All Assignments	Go	
Details	Type	Name	Details
Show	General	PIZZA PALACE	General accounts used at all supplier addresses.
Show	Address	4545 MUSHROOM RD	4545 MUSHROOM RD STE 100, SAUCY, OH, 45654, United States
Show	Address	8989 PEPPERONI	8989 PEPPERONI ST, CHEESE, OH, 44555, United States

4. Find the address to add the banking information to and click on the Assignments icon.

Banking Details			
View	All Assignments	<input type="button" value="Go"/>	
Details	Type	Name	Details
Show	General	PIZZA PALACE	General accounts used at all supplier addresses.
Show	Address	4545 MUSHROOM RD	4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States
Show	Address	8989 PEPPERONI	8989 PEPPERONI ST,CHEESE,OH,44555,United States

5. Click on the Create button.

Manage Bank Account Assignments											
									<input type="button" value="Cancel"/>	<input type="button" value="Save"/>	
		Address Name	4545 MUSHROOM RD								
		Address Details	4545 MUSHROOM RD STE 100,SAUCY,OH,45654,United States								
<input type="button" value="Add"/>	<input type="button" value="Create"/>										
Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.											

6. Start to type the Routing number in the Routing number field. As you type Routing Numbers should start to populate below the field after a slight delay. Choose the correct Routing Number by clicking on the number populated by the system.

Bank		Branch	
<input type="radio"/> New Bank	<input checked="" type="radio"/> Existing Bank	<input type="radio"/> New Branch	<input checked="" type="radio"/> Existing Branch
* Routing Number <input type="text" value="04100012"/>		* Confirm Routing Number <input type="text"/>	
<div style="border: 1px solid gray; padding: 2px;"> Routing Number 041000124 </div>		BIC <input type="text"/> Branch Type <input type="text" value="ABA"/>	

7. Enter your Routing Number again in the Confirm Routing Number field. As you type Routing Numbers should start to populate below the field after a slight delay. Choose the correct Routing Number by clicking on the number populated by the system.

Bank		Branch													
<input type="radio"/> New Bank	<input checked="" type="radio"/> Existing Bank	<input type="radio"/> New Branch	<input checked="" type="radio"/> Existing Branch												
* Routing Number <input type="text" value="041000124"/>		* Confirm Routing Number <input type="text" value="04100012"/>													
Show Bank Details		Show Branch Details													
		<table border="1"> <thead> <tr> <th>Branch Name</th> <th>Branch Number</th> <th>Bank Name</th> <th>Bank Number</th> <th>BIC</th> <th>Branch</th> </tr> </thead> <tbody> <tr> <td></td> <td>041000124</td> <td>PNC</td> <td>041000124</td> <td></td> <td></td> </tr> </tbody> </table>		Branch Name	Branch Number	Bank Name	Bank Number	BIC	Branch		041000124	PNC	041000124		
Branch Name	Branch Number	Bank Name	Bank Number	BIC	Branch										
	041000124	PNC	041000124												

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

Bank Account	
* Account Number <input type="text" value="987654"/>	Currency <input type="text" value="US Dollar"/>
IBAN <input type="text"/>	Account Status New
Your Company Name <input type="text"/>	
Show Account Details	

- Enter your Account Name (Nickname) in the Account Name field. Enter Checking or Savings in the Description field. Add any necessary notes in the Note to Buyer field. Click the Save button.

- The system will display a confirmation notice that the bank information has been added to your profile. Click on the Show hyperlink.

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
Show	987654		US Dollar		26-Jun-2013		1	▲	▼	New	✎

- Your bank information request will be routed to the Buyer Admin for approval. Click the Save button.

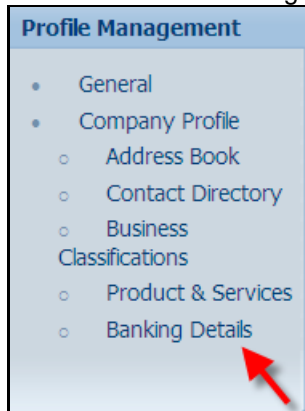
Assignment Status: **Awaiting approval for general use of account**

- Once your bank information is approved you will receive an email confirmation and the Assignment Status will change to approved.

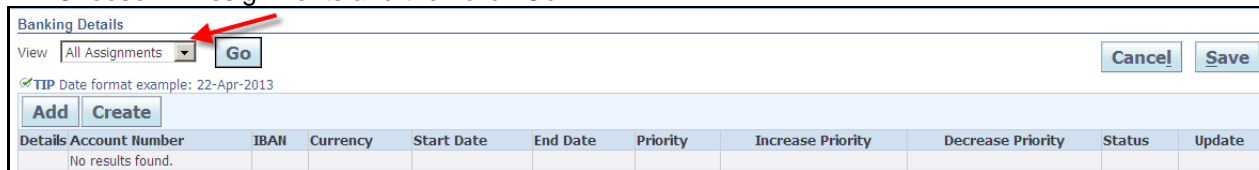
Routing Number Does Not Exist

If your bank Routing Number does not exist in Progressive's system cancel out of the banking forms.

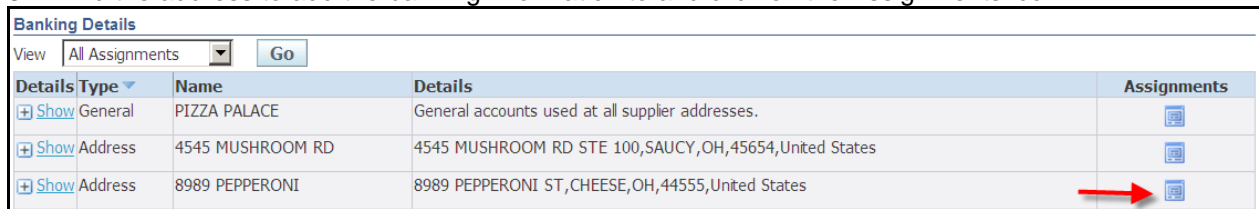
1. Click on the Banking Details link again.



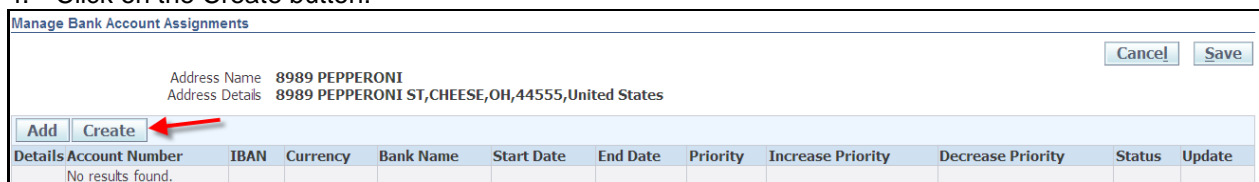
2. Choose All Assignments and then click Go.



3. Find the address to add the banking information to and click on the Assignments icon.



4. Click on the Create button.



5. Select the New Bank radio button. Choosing this option will also enable the New Branch radio button.

Bank **Branch**

New Bank New Branch

Existing Bank Existing Branch

* Routing Number * Confirm Routing Number

6. Enter the Routing Number in the Routing Number field and in the Confirm Routing Number field.

Bank **Branch**

New Bank New Branch

Existing Bank Existing Branch

Routing Number Confirm Routing Number

Your routing number must be 9 digits

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

Bank Account

* Account Number Currency

IBAN Account Status

Your Company Name

[Show Account Details](#)

8. Enter your Account Name (Nickname) in the Account Name field. Enter Checking or Savings in the Description field. Add any necessary notes in the Note to Buyer field. Click the Save button.

Bank Account

* Account Number Currency

IBAN Account Status

Account Name Description

✓ TIP i.e. College Account, Savings Account, Business Checking.

[Hide Account Details](#)

Details

Alternate Account Name End Date

Account Suffix Please enter Checking or Savings

Agency Location Code (example: 26-Jun-2013)

9. The system will display a confirmation notice that the bank information has been added to your profile. Click on the Show hyperlink.

Confirmation

Bank account 2666696, 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 Assignments

Address Name **8989 PEPPERONI**

Address Details **8989 PEPPERONI ST,CHEESE,OH,44555,United States**

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
Show	2666696		US Dollar		26-Jun-2013		1	▲	▼	New	

10. Your bank information request will be routed to the Buyer Admin for approval. Once your bank information is approved you will receive an email confirmation. Click the Save button.

Address Name **8989 PEPPERONI**
 Address Details **8989 PEPPERONI ST,CHEESE,OH,44555,United States**

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
<input type="checkbox"/> Hide	2666696		US Dollar		26-Jun-2013		1	⬆	⬇	New	

Your Company Name **My Company Account** Account Type
 Routing Number Branch Name

Assignment Status **Awaiting approval for general use of account**

11. Once your bank information is approved you will receive an email confirmation and the Assignment Status will change to approved

Add Bank to Address Using Existing Bank

This example will show you how to use the bank existing information associated to one of your addresses and attach that same bank information to an existing address that does not currently have any bank information associated to it.

1. Click on the Banking Details link again.

Profile Management

- General
- Company Profile
 - Address Book
 - Contact Directory
 - Business Classifications
 - Product & Services
 - **Banking Details**

2. Choose All Assignments and then click Go.

Banking Details

View **All Assignments**

TIP Date format example: 22-Apr-2013

Details	Account Number	IBAN	Currency	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.										

- Click on the Assignments icon for the address that requires the banking information to be associated to it.

Banking Details

View **All Assignments**

Details Type	Name	Details	Assignments
Show General	FLOWERS R US	General accounts used at all supplier addresses.	
Show Address	25255 LAVENDER	25255 LAVENDER ST,PURPLE,CA,33465,United States	
Show 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	

- Click on the Add button.

Manage Bank Account Assignments

Address Name **25255 LAVENDER**
Address Details **25255 LAVENDER ST,PURPLE,CA,33465,United States**

Details Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.										

- Select the Account Number (banking information) to be associated to the address and then click on the Save button.

Add Account

[Select All](#) | [Select None](#)

Select Account Number	Account Name	IBAN	Currency	Bank Name	Branch Name	Status
<input type="checkbox"/> XXXX3333			US Dollar	051123456	051123456	New
<input checked="" type="checkbox"/> XXXX7566			US Dollar	PNC	041000124	Approved

- The system will display a confirmation that the general account assignments have been updated. Click on the Show hyperlink.

Confirmation

The general account assignments have been updated.

Manage Bank Account Assignments

Address Name **25255 LAVENDER**
Address Details **25255 LAVENDER ST,PURPLE,CA,33465,United States**

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			Approved	

- Your bank account information is now routing to the Buyer Admin for approval. Click on the Save button.

Manage Bank Account Assignments

Address Name **25255 LAVENDER**
Address Details **25255 LAVENDER ST,PURPLE,CA,33465,United States**

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			Approved	

Your Company Name _____
Routing Number **041000124**

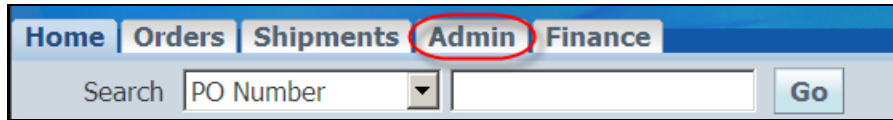
Account Type **Checking**
Branch Name **041000124**

Assignment Status **Awaiting approval for general use of account**

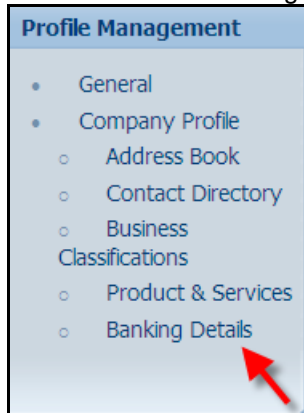
- Once your bank information is approved you will receive an email confirmation and the Assignment Status will change to approved

View Bank Account

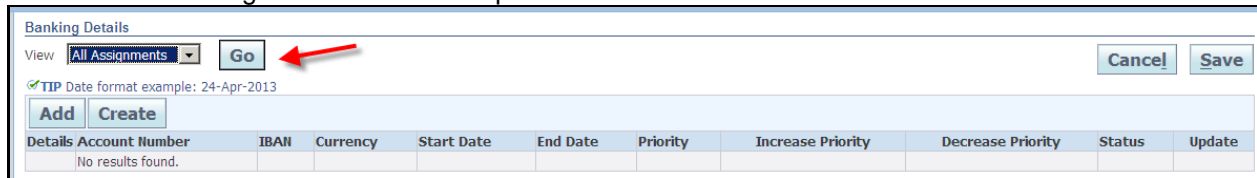
1. Click on the Admin tab.



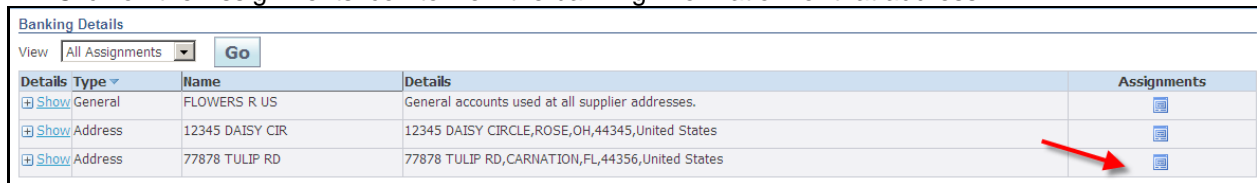
2. Click on the Banking Details link.



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



4. Click on the Assignments icon to view the banking information for that address.

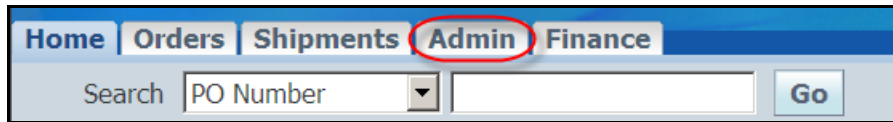


5. You bank information will display and show approved.

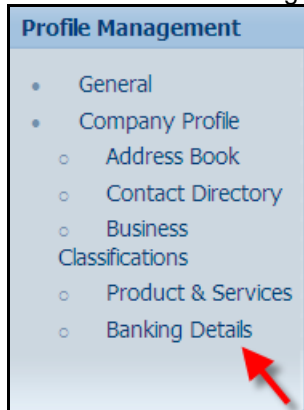


Inactivate Bank Account for a Specific Address

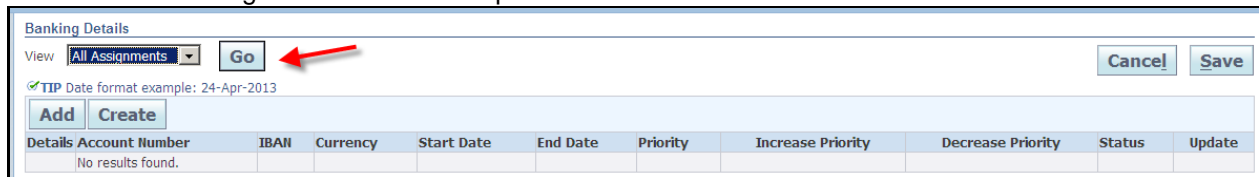
1. Click on the Admin tab.



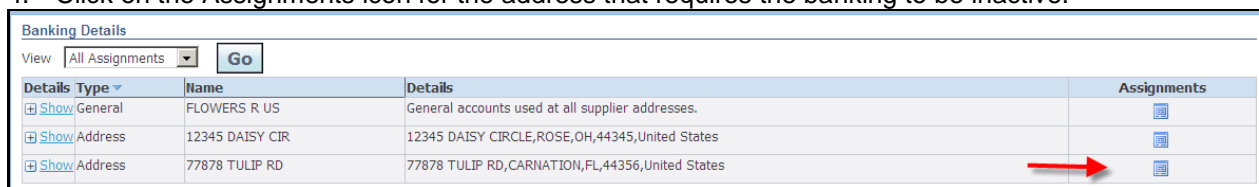
2. Click on the Banking Details link.



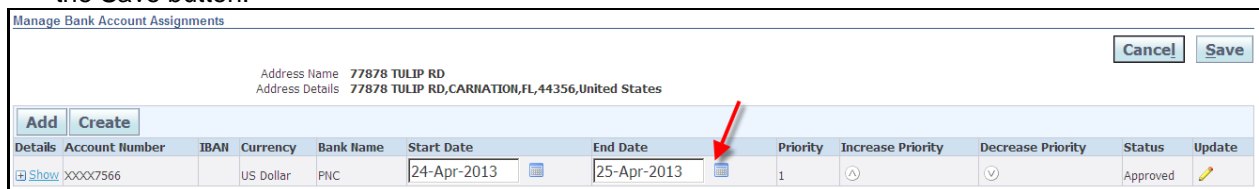
3. Choose All Assignments from the drop down list and then click Go.




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



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







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

Confirmation
The general account assignments have been updated. 

Manage Bank Account Assignments

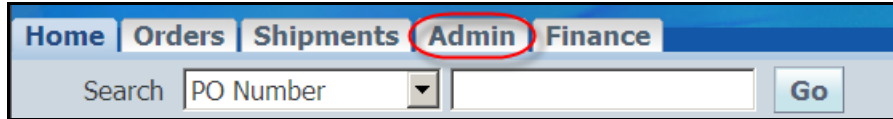
Address Name 77878 TULIP RD
Address Details 77878 TULIP RD,CARIATION,FL,44356,United States

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXX7566		US Dollar	PNC	24-Apr-2013	25-Apr-2013	1			Approved	

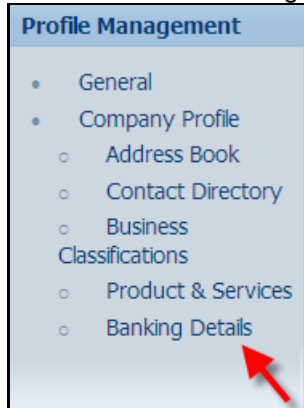
NOTE: If you are deactivating your banking information for a specific address because it has changed, be sure to set up the new banking information for the same address immediately after you submit your deactivation request. This will ensure that there is no disruption in your EFT payments.

View Bank Account Address Assignments

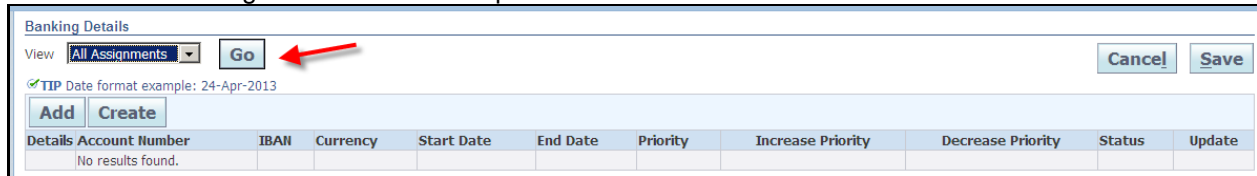
1. Click on the Admin tab.



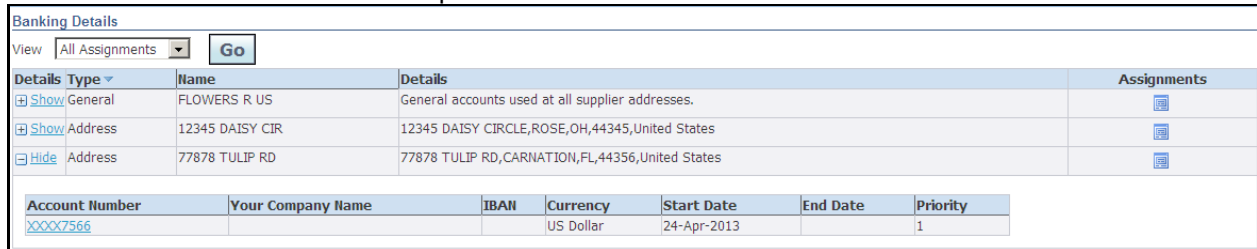
2. Click on the Banking Details link.



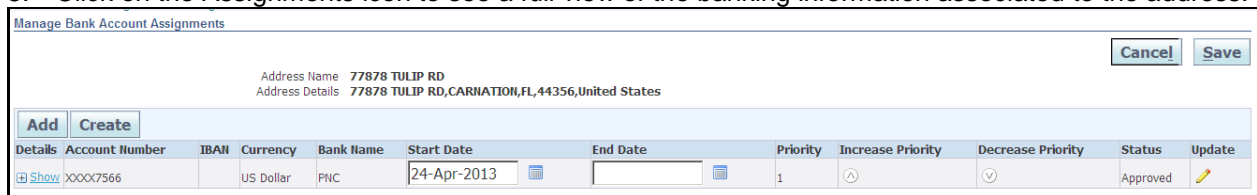
3. Choose All Assignments from the drop down list and then click Go.



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



5. Click on the Assignments icon to see a full view of the banking information associated to the address.



Sample of EFT Notification of Deposit

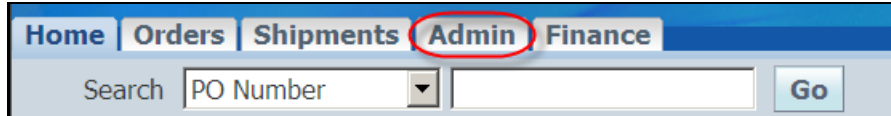
PROGRESSIVE®		Page 1 of 1		
NOTICE OF DEPOSIT: ELECTRONIC FUNDS TRANSFER # 820680341				
EVEREADY PRINTING INC 20700 MILES PKWY CLEVELAND, OH 44128 (216) 587-2389		The Progressive Group of Insurance Companies 6300 Wilson Mills Rd. Mayfield Village, OH 44143		
Notice of Deposit:	05/14/2013	Account Number:	*****7509	
Progressive's Supplier Number:	14857	Routing Number:	044000037	
Total Payment Amount:	\$3,744.40	Total Number of Invoices:	3	
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 Accounts Payable at (440) 446-7467.				
Details:				
INVOICE #	COMPANY	DATE	DESCRIPTION	AMOUNT
20201	Progressive Casualty Insurance Company	04/18/2013	JOB 34255	\$1,278.00
20202	Progressive Casualty Insurance Company	04/18/2013		\$869.00
20200	Progressive Casualty Insurance Company	04/18/2013		\$1,597.40

Contacts Directory

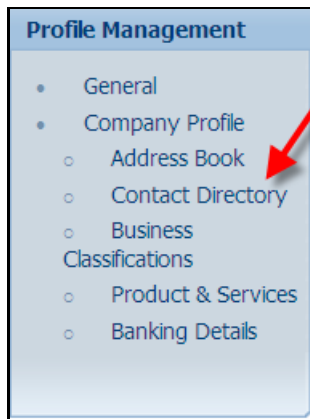
The iSupplier application allows Suppliers to provide Contact information to Progressive via the iSupplier portal.

If you choose to include this information in the application, it will be submitted to 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 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	<input checked="" type="checkbox"/>			
ANNE	GRITZER	216 663-8181		Current	<input type="checkbox"/>			
LISA	HENKEL		LHENKEL@ALT.COM	Current	<input checked="" type="checkbox"/>			
Karen	Katona		KMKTEST@YAHOO.COM	Current	<input checked="" type="checkbox"/>			

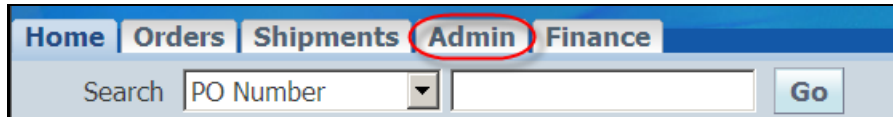
NOTE: To add an iSupplier User to your account an Add/Delete User from must be completed by the person with the correct authority and then submitted to Progressive for processing and approval.

Business Classifications

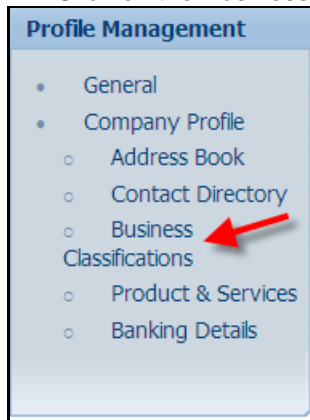
The iSupplier application allows Suppliers to provide their Business Classification information to Progressive via the iSupplier portal. Inclusion of this information is strictly voluntary and not required by Progressive.

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.

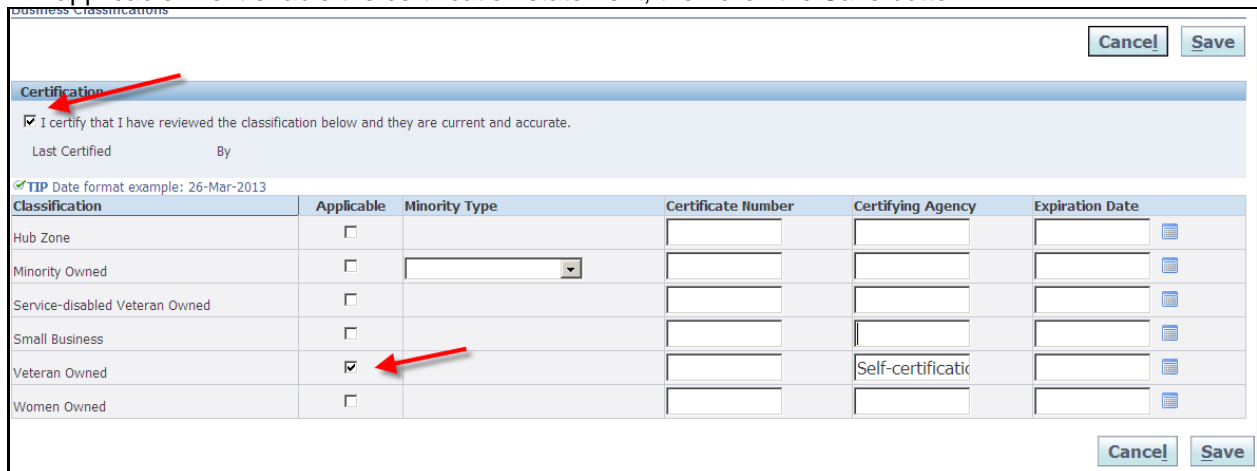
1. Click on the Admin tab.



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.



Business Classifications Cancel Save

Certification

I certify that I have reviewed the classification below and they 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	<input type="checkbox"/>				
Minority Owned	<input type="checkbox"/>				
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input type="checkbox"/>				
Veteran Owned	<input checked="" type="checkbox"/>			Self-certificati	
Women Owned	<input type="checkbox"/>				

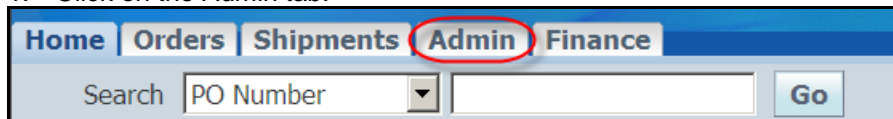
Cancel Save

Products and Services

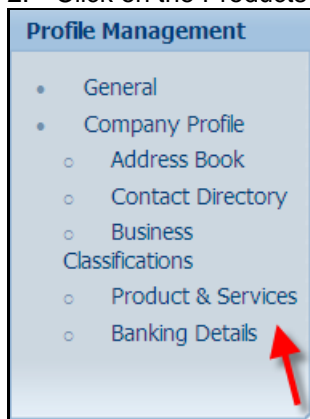
The iSupplier application allows Suppliers to provide their Products and Services information to Progressive via the iSupplier portal. Inclusion of this information is strictly voluntary and not required by Progressive.

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.

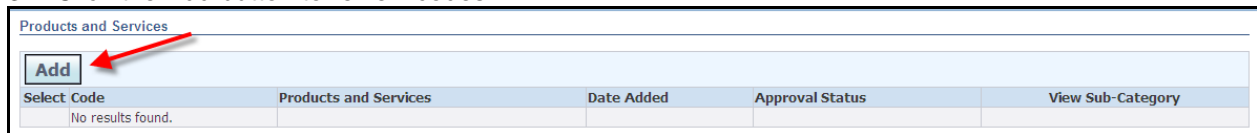
1. Click on the Admin tab.



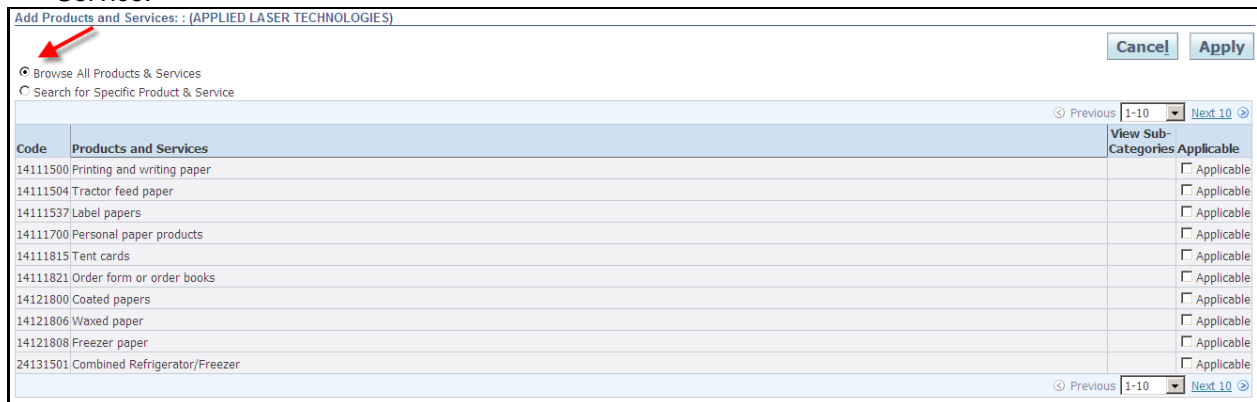
2. Click on the Products and Services link.



3. Click the Add button to review codes.



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



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

Code	Products and Services	View Sub-Categories	Applicable
44102414	Self-inking stamp		<input type="checkbox"/> Applicable
44103119	Heat transfer paper for copiers		<input type="checkbox"/> Applicable
44111513	Supports for diaries or calendars		<input type="checkbox"/> Applicable
44111522	Book holder		<input type="checkbox"/> Applicable
44111804	Drafting papers		<input type="checkbox"/> Applicable
44111808	T squares		<input type="checkbox"/> Applicable
44111909	Board cleaning kits or accessories		<input type="checkbox"/> Applicable
44111912	Whiteboard eraser		<input type="checkbox"/> Applicable
44120000	Office supplies		<input checked="" type="checkbox"/> Applicable
44121510	Mailing seals		<input type="checkbox"/> Applicable

[Previous 10](#) | 61-70 | [Next 10](#)

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 following Product and Service categories have been added to your profile.

- Office supplies

[Return to Products and Services](#)

Your submission is now in a Pending Approval status.

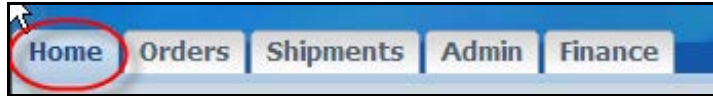
Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/> 44120000	Office supplies	10-Apr-2013	Pending Approval	

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

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/> 44120000	Office supplies	10-Apr-2013	Approved	

Export Results

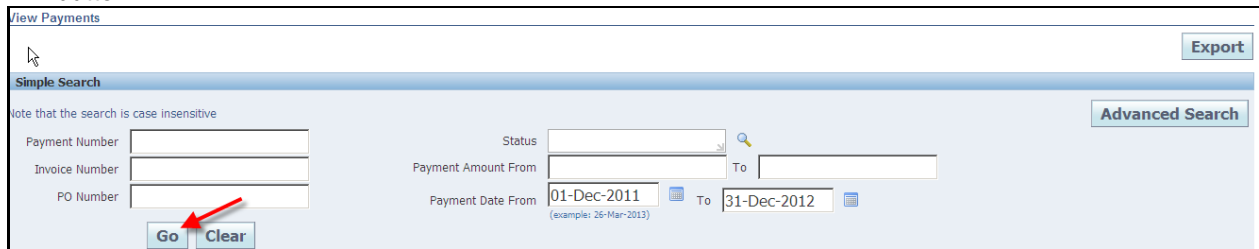
1. Click on the Home tab.



2. Click on the Payments or the Invoices link. In this example we will use Payments.



3. In this example view all payments made from 12/1/11 – 12/31/12, fill in the dates and click the Go button.



4. The results show many payments, click the Export button.

5. The file download box will appear, click Save to save your information in .csv format. Click Open to open the file.

Payment results example.

A	B	C	D	E	F	G	H	I	J
Payment	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
820669355	31-Dec-12	USD	757.85	Electronic	Cleared but Unaccounted	02-Jan-13	CTP EFT Account	Multiple	Multiple
820669308	30-Dec-12	USD	6218.66	Electronic	Cleared but Unaccounted	02-Jan-13	CTP EFT Account	Multiple	Multiple
820668637	26-Dec-12	USD	7729.19	Electronic	Cleared but Unaccounted	27-Dec-12	CTP EFT Account	Multiple	Multiple
820668454	25-Dec-12	USD	6702.58	Electronic	Cleared but Unaccounted	26-Dec-12	CTP EFT Account	Multiple	Multiple
820668396	24-Dec-12	USD	13052.1	Electronic	Cleared but Unaccounted	26-Dec-12	CTP EFT Account	Multiple	Multiple
820668330	23-Dec-12	USD	9071.28	Electronic	Cleared but Unaccounted	26-Dec-12	CTP EFT Account	Multiple	Multiple
820668196	19-Dec-12	USD	2381.02	Electronic	Cleared but Unaccounted	20-Dec-12	CTP EFT Account	Multiple	Multiple
820668053	17-Dec-12	USD	7276.7	Electronic	Cleared but Unaccounted	18-Dec-12	CTP EFT Account	Multiple	Multiple
820668007	16-Dec-12	USD	27672.67	Electronic	Cleared but Unaccounted	18-Dec-12	CTP EFT Account	Multiple	Multiple
820667399	12-Dec-12	USD	4944.66	Electronic	Cleared but Unaccounted	13-Dec-12	CTP EFT Account	Multiple	Multiple
820667334	11-Dec-12	USD	6472.49	Electronic	Cleared but Unaccounted	12-Dec-12	CTP EFT Account	Multiple	Multiple
820667291	10-Dec-12	USD	6774.81	Electronic	Cleared but Unaccounted	11-Dec-12	CTP EFT Account	Multiple	Multiple

Self –Service Password Reset

Follow the steps below to reset your user password.

1. Access the iSupplier Login Page, <https://suppliers.progressive.com/>.
2. Click Login Assistance, located directly below the Login button.



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

Login Assistance

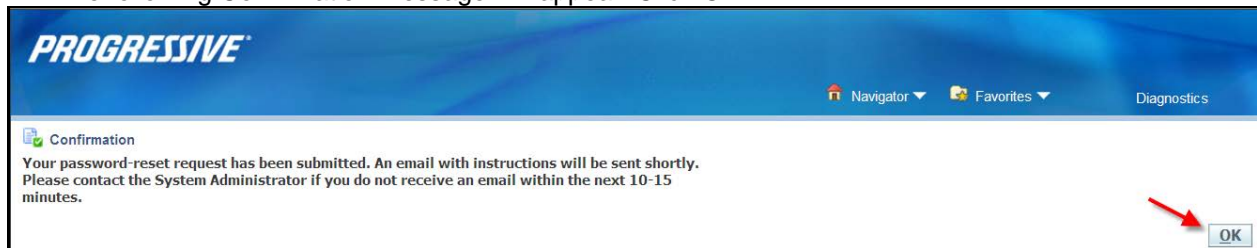
* Indicates required field

Forgot Password

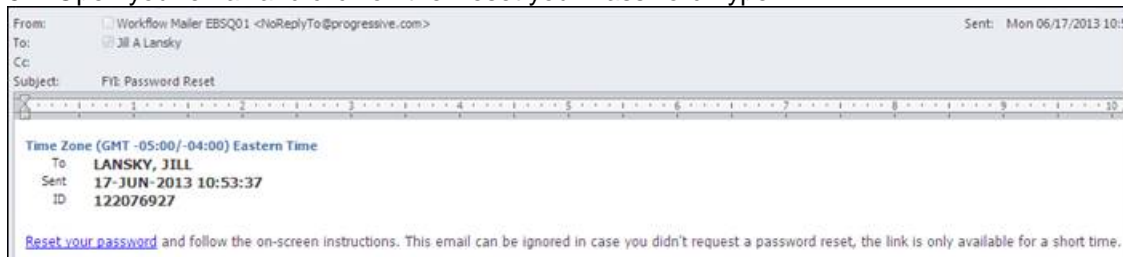
Enter your user name, instructions for how to reset your password will be emailed to you.

User Name

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



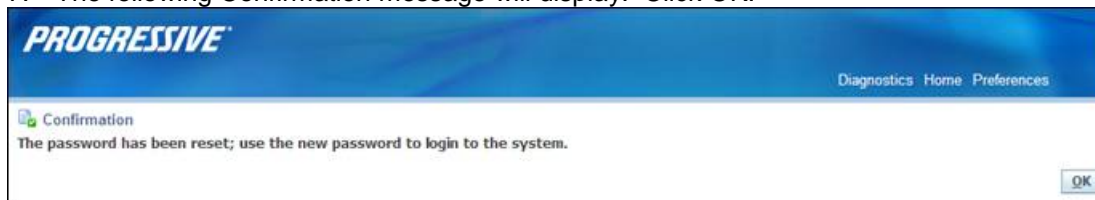
5. Open your email and click on the Reset your Password hyperlink.



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

The screenshot shows a web form titled "Reset Password". At the top, it includes a legend: "* Indicates required field". Below this, a message states: "Please enter your username and passwords below. The password you enter below will be used to replace your old password." The form contains three input fields: "User Name" with the value "jab0020", "Password" with masked characters and a note "(5 characters or more)", and "Confirm Your Password" also with masked characters. A "Confirm Password" button is located at the bottom of the form.

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



8. Login to iSupplier using your newly created password.

Troubleshooting

Internet Browser Issues

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

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

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

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 corporatesuppliersupport@progressive.com 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 they can be 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.