Overview

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

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 add and manage your bank account information with Progressive. It also provides payment remittance information. iSupplier will be the primary way that you will be able to answer the following questions:

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

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

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

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

External Phone Number: 1-877-616-7473

Fax Number: 440-603-5560

By E-mail: isuppliersupport@progressive.com

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

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

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

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

The following information will assist you while navigating through iSupplier.

**Back Button**

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

**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.
**Login to iSupplier**

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

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

   ![Email Confirmation Image]

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

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

   ![iSupplier Login Image]

3. You will be immediately prompted to change your password.

4. Enter the temporary password.

5. Enter a new password.
   
   **NOTE:** Passwords must be at least 5 characters long and will expire every 120 days.

6. Re-enter the new password and click Apply.
iSupplier Homepage

You are now at your iSupplier Home Page.

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

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

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

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

From the **Home Tab**, the following actions can occur:
- View and search for Payments
- View Notifications

From the **Orders Tab**, the following actions can occur:
- View and manage deliverables

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

From the **Finance Tab** the following actions can occur:
- View and search invoices
- View and search payments

**View Supplier Details**

1. Click on the Admin tab.

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

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name: <strong>MY AUTO SHOP</strong></td>
</tr>
<tr>
<td>Supplier Number: <strong>529603</strong></td>
</tr>
<tr>
<td>Taxpayer ID: <strong>342256756</strong></td>
</tr>
</tbody>
</table>
Address Book

1. Click on the Admin tab.

2. Click on the Address Book link.

The system will display all addresses assigned to your account.

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Address Details</th>
<th>Country</th>
<th>Update</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>6550 FORD AVE</td>
<td>6550 FORD AVE OCALA, FL</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>987678 CHEVY CI</td>
<td>987678 CHEVY CIRCLE MARICopa, AZ</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add/Remove Address

All requests for address additions must be in a written format and emailed to the following address:

iSuppliersupport@progressive.com

The following information is required:

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

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

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

1. Click on the Admin tab.

2. Click on the Address Book link.

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

4. Make the necessary changes to your Address. In the Note field, document any comments that are applicable. Click on the Save button.
6. You will receive a confirmation email once the change has been approved/processed by Progressive.

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Address Details</th>
<th>Country</th>
<th>Update</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>6550 FORD AVE</td>
<td>6550 FORD AVE STE 125 Ocala, FL 44124</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>987678 CHEVY CI</td>
<td>987678 CHEVY CIRCLE MIRACOPA, AZ</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contact Directory**

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

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

1. Click on the Admin tab.

2. Click on the Contact Directory link.

3. The system will display all Contacts listed on your Supplier Account. Actual iSupplier Users are noted on your account by having a ☑ in the User Account field, otherwise the person listed is just a contact on your account and will not have access to iSupplier under any responsibility.
NOTE: To add an iSupplier User to your account an Add/Delete User from must be completed by the person with the correct authority and then submitted to Progressive for processing and approval. (see “Add/Delete User” process steps for more information)

Add/Delete User
To add or remove a user’s access from iSupplier, you must complete a request form. An electronic copy of this form is available at www.progressive.com/Suppliers/Suppliers.aspx.

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

Claims ISP Manager - View & Edit Bank Account/User Contact Info
- Manage bank account information
- Search/view payment information

Claims ISP Inquiry - View Only:
- Search/view payment information

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

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

Fax: 440-603-5560

If you have any questions contact the iSupplier Support Line at 877-616-7473 or send an email to isuppliersupport@progressive.com.
Sample Add/Delete User Form

Progressive Add/Delete User Form for iSupplier

Instructions: This form must be filled out and signed by an Authorized User already on the account with the Claims ISP Manager responsibility. If the Authorized User is no longer employed, the owner of the company must complete the form.

Submit the form using one of the below options.
1. Email to: isuppliersupport@progressive.com
2. Fax to: 440-803-5560, Attn: Supplier Maintenance
3. Mail to: Progressive Insurance
   Attn: Supplier Maintenance
   PO Box 94505
   Cleveland, OH 44101

Requestor Information

Supplier Name: ________________________________

Supplier Address: ________________________________

Street Address

Apartment/Unit #

City ____________________________ State ______ ZIP Code ______

Progressive Supplier #: ____________________________ Tax ID #: ____________________________

Add User Information

Full Name: ________________________________

First ________________________________ Last ________________________________ M.I. ________________________________

Email Address: ________________________________

Phone: ________________________________

User Access: □ Claims ISP Manager – Manage Bank Account Information + View Payment Information
□ Claims ISP Inquiry – View Payment Information Only

User ID (Office Use Only): ________________________________

Delete User Information

Full Name: ________________________________

Last ________________________________ First ________________________________ M.I. ________________________________

Delete Date: ________________________________

Authorized User Information

Authorized User Name: ________________________________ Title: ________________________________

Authorized User Signature: ________________________________ Date: ________________________________
Business Classifications

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

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

1. Click on the Admin tab.

2. Click on the Business Classifications link.

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

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

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

1. To start click on the Admin tab.

2. Click on the Products and Services link.

3. Click the Add button to review codes.

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.

<table>
<thead>
<tr>
<th>Code</th>
<th>Products and Services</th>
<th>View Sub-Categories</th>
<th>Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>44102414</td>
<td>Self-inking stamp</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44100319</td>
<td>Heat transfer paper for coasters</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111513</td>
<td>Supports for darts or calendars</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111522</td>
<td>Book holder</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111604</td>
<td>Drafting papers</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111800</td>
<td>T squares</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111900</td>
<td>Board cleaning kits or accessories</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44111912</td>
<td>Whiteboard eraser</td>
<td></td>
<td>Applicable</td>
</tr>
<tr>
<td>44120000</td>
<td>Office supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>44121510</td>
<td>Mailing seals</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

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

8. Once approved by Progressive’s Supplier Maintenance group your submission will show in an Approved status.
**Bank Account Setup (Electronic Funds Transfer (EFT))**

Follow the steps below to enter and assign your bank account information. To perform these steps you must have the “Claims ISP Manager” responsibility, which allows for view/edit of bank accounts.

**Note:** Bank Accounts should always be assigned to a specific payment address (aka site). If you need to add bank account information to multiple sites, this can be done using the “Adding Bank Account to Multiple Payment Addresses” process steps below.

### View Bank Account(s)

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

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

Account Statuses:

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

**Enter a New Bank Account**

What you need:

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

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

1. Click on the Admin tab.

2. Click on the Banking Details link.
3. **Important Step** - Choose “All Assignments” from the drop down View box, Click Go. This step will allow you to associate your bank account to individual payment addresses.

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

5. Click on the Create button.

6. Select the “Existing Bank” radio button (should auto default as selected)

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

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

9. Enter your Bank Account Number in the Account Number field. Click on the Show Account Details link.
10. Enter your Account Name (Nickname) in the Account Name field.
11. Enter “Checking” or “Savings” in the Description field. Click the Save button.

12. A confirmation notice will display noting the bank information has been added to your profile and is being routed for approval.
13. Click on the “Show” hyperlink to view the details of the bank account you just added.

14. Click on the Save button.

15. Once your bank information is approved by Progressive, you will receive an email confirmation and the Assignment Status will change to “Approved”.
Add Bank Account to Multiple Payment Addresses

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

1. Click on the “Banking Details” link

2. Choose “All Assignments” and then click Go.

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

4. Click on the Add button.

5. Check the box next to the Account Number you want associated to your payment address. Click Save.
6. A confirmation notice will display stating the bank account has been updated via your Assignment request. (Your bank account information is now routing to Progressive for approval)

7. Click on the “Show” hyperlink (above) to see the details of your request.
8. Click on the Save button.

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

**Inactivate Bank Account for a Specific Payment 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.

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

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

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

<table>
<thead>
<tr>
<th>CLAIM #</th>
<th>CUSTOMER NAME</th>
<th>VEHICLE DESCRIPTION</th>
<th>VIN</th>
<th>COVERAGE</th>
<th>INVOICE #</th>
<th>COMPANY</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-044682</td>
<td>VINCENT P SCHNAD</td>
<td>97 HONDA CIVIC 4DR</td>
<td>975263979</td>
<td>COLL</td>
<td>0120</td>
<td>Progressive Casualty Insurance Co</td>
<td>$569.33</td>
</tr>
<tr>
<td>07-052449</td>
<td>MARTHA RINKER</td>
<td>02 FORD EXPLORER 4X4</td>
<td>1FMCU72H72100620</td>
<td>COLL</td>
<td>0196</td>
<td>Progressive Direct Insurance Co</td>
<td>$10,461.85</td>
</tr>
<tr>
<td>07-061302</td>
<td>KIMBERLY L LOWE</td>
<td>08 FORD EXPEDITION 4X4</td>
<td>1FMCU72H76103583</td>
<td>COLL</td>
<td>0102</td>
<td>Progressive Classic Insurance Co</td>
<td>$10,574.30</td>
</tr>
<tr>
<td>07-062303</td>
<td>ALBERT L PERKIN</td>
<td>06 FORD TAURUS QUAD</td>
<td>1FALF52U76100065</td>
<td>COLL</td>
<td>0184</td>
<td>Progressive Midwestern Insurance Co</td>
<td>$10,768.73</td>
</tr>
<tr>
<td>07-071807</td>
<td>KATHY SMART</td>
<td>08 HONDA CIVIC EX 4D</td>
<td>1HGHS269P71008181</td>
<td>COLL</td>
<td>0112</td>
<td>Progressive Casualty Insurance Co</td>
<td>$9,738.00</td>
</tr>
<tr>
<td>07-072304</td>
<td>DOROTHY MULHORSE</td>
<td>08 MERCEDES 500 SED</td>
<td>WDBG977577100582</td>
<td>COLL</td>
<td>0187</td>
<td>Progressive Casualty Insurance Co</td>
<td>$10,000.25</td>
</tr>
<tr>
<td>07-091426</td>
<td>JUN ERAMAS</td>
<td>07 MITSU ECLIPSE GS 2H</td>
<td>443AXJ44172508182</td>
<td>COLL</td>
<td>0223</td>
<td>Progressive Midwestern Insurance Co</td>
<td>$85.00</td>
</tr>
</tbody>
</table>
View/Export Invoice Details

1. Click on the Finance tab.

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

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

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

5. Click on the Export button (upper right hand corner)

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

<table>
<thead>
<tr>
<th>Invoice No/Description</th>
<th>Currency</th>
<th>Invoice Amount</th>
<th>Invoice Date</th>
<th>EFT/Payment Number</th>
<th>Supplier Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>100189 08-3518248/JONES,MARY/06 DODGE MAGNUM USD</td>
<td>USD</td>
<td>1055.61</td>
<td>01-Jun-08</td>
<td>710053072 - Electronik 200 S WINEVILLE</td>
<td></td>
</tr>
</tbody>
</table>
View/Export Payment Details

1. Click on the Finance tab.

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

3. View the payment details.

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

5. Click on the EFT/Payment Number hyperlink again

6. This produces a separate view of the payment details. **Note:** You can also click on the Invoice Number hyperlink to view invoice details on this payment.
7. Click Export.
8. The file download box will appear, click Save to save your information in .csv format. Click Open to open the file in Excel.

Payment results example.

<table>
<thead>
<tr>
<th>EFT/Payment Number</th>
<th>Payment Date</th>
<th>Currency</th>
<th>Total Amount</th>
<th>Bank Account Name</th>
<th>Supplier Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>71355310</td>
<td>24-Feb-13</td>
<td>USD</td>
<td>6478.58</td>
<td>CTB EFT Account</td>
<td>INDI0 CA</td>
<td>INDIO</td>
<td>CA</td>
<td>92201</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>$ Amount</td>
<td>Description</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8862828</td>
<td>929.06</td>
<td>13-5306721/SMITH, MARY/99 HONDA ACCORD LX CP/1HGCG3148XAD02645</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8864267</td>
<td>5549.52</td>
<td>13-1105885/JONES, JOE/12 NISSA VERSA BASE/4D/3N1CN7AP1CL935654</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Troubleshooting

Self –Service Password Reset

Follow the steps below to reset your user password.

1. Access the iSupplier Login Page.

2. Click Login Assistance, located directly below the Login button.

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

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

5. Open your email and click on the Reset your Password hyperlink.
6. The following screen will appear. Enter your user name, your new password and confirm your new password.

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

8. Login to iSupplier using your newly created password.

**Internet Browser Issues**

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

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

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

If you are still experiencing issues logging in after using one of the compatible browsers or Internet Explorer versions above, please send an email to isuppliersupport@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 your payment details. Payment detail .pdf files are sent every time a payment is made to your company.

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

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