

***PROGRESSIVE***<sup>®</sup>

Workday Supplier Portal  
Procedures Manual -  
Suppliers

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## Introduction

The Workday Supplier Portal is a secure, self-service, web-based application provided to you by Progressive. This tool will allow you to manage your bank account information with Progressive, contact information, manage user portal account access, and view payment remittance information. Features available will differ based on the user's access type.

## Help

This procedure manual is intended to act as a user guide to help you complete various tasks associated with managing your company's supplier record information with Progressive. If there are questions or concerns not addressed by this procedure manual, please use the contact information below for assistance and resources

For assistance, please contact our Supplier Maintenance Team:

- 877-616-7473 Monday through Friday between the hours of 8:00 AM and 5:30 PM Eastern Standard Time
- Fax: 440-603-5560
- [ClaimsSupplierSupport@Progressive.com](mailto:ClaimsSupplierSupport@Progressive.com)
- [www.Progressive.com/suppliers](http://www.Progressive.com/suppliers) for additional resource material

For assistance or questions regarding your invoices or payments please contact your Progressive claims representative.

## Privacy

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### What information do you collect about me?

This site allows you to submit and update information, such address, bank, and bank account number, and contact information 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 funds transfer; and as required to cooperate with law enforcement or regulatory (including, but not limited to, tax) authorities, to 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.

### TERMS AND CONDITIONS FOR USE OF THIS SITE

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 is recommended to check this page regularly. Your failure to follow the rules herein, whether listed below or in supplemental notices posted at various times on this page, may result in termination of your access to this site, in addition to Progressive's other remedies.

### Use of This Website

The purpose of this site is to manage your supplier information and help us 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 and/or security questions. You agree to accept responsibility for all activities that occur under your Password/PIN/Security Questions. 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/Security Questions 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

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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.

## Login

You will receive 2 emails from Workday as a new user:

- A welcome email from Workday that contains your username
  - An email from Workday that contains your temporary password and a link to log into the supplier portal
1. Go to <https://www.myworkday.com/r2rhub/login.flex?redirect=n>
  2. Enter the username from the email received from Workday
  3. Enter the temporary password from the email received from Workday
  4. Workday will prompt you to enter a new password. Enter a new password and click OK
  5. You will now be brought to the Workday Portal Home Page

## Forgot Username

If you have forgotten the username associated with your Workday portal account, please refer to the welcome email received when your portal account was established or contact

[ClaimsSupplierSupport@Progressive.com](mailto:ClaimsSupplierSupport@Progressive.com) and provide the following information:

- Your company/supplier name
- Your Progressive supplier number (if known)
- Your full name
- The email address associated with your Workday portal account
- A phone number that you can be reached at
- The address of your company

## Forgot Password – User Initiated

1. Go to <https://www.myworkday.com/r2rhub/login.flex?redirect=n>
2. Click “Forgot My Password”

A screenshot of the Workday login page. The page has a blue header with the Workday logo. Below the header is a white login form with two input fields: 'Username' and 'Password'. A 'Sign In' button is located below the password field. At the bottom of the page, there is a link that says 'Forgot Password?'. The entire page is framed by a blue border.

3. You will be redirected to a page requesting your username and email address
4. Enter your username and email address associated with your Workday Supplier Portal account

**NOTE:** If the Username and Email Address provided do not match our records, this method of password reset cannot be used. Please contact the Supplier Maintenance Team using the contact information under the [“Help”](#) section of this procedure manual

5. Once the information is input click submit
6. You will be brought to a screen that says Success
7. You can then click “Back to Sign In” to be redirected to the sign in page



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The screenshot shows two parts of the Workday interface. On the left is the 'Forgot Password' form with fields for 'Username' and 'Email', and a 'Submit' button. On the right is a success message box with the Workday logo, a green checkmark icon, and the text: 'Success! If the email address and username you entered exist in our system, you will receive an email from us with a link to reset your password.' Both sections have a 'Back to Sign In' button at the bottom.

8. An email will be sent to the email address on file with a link to reset the password

The screenshot shows an email interface. The subject is '[EXTERNAL] Password Reset Request for your Workday account'. The sender is 'r2rhub@myworkday.com' and the recipient is 'Carla Lopez'. The email body contains the following text: 'Workday recently received a request to reset the password for your Workday account at 7/7/22, 3:13 PM. Please use the button below to reset it. This password reset is only valid for the next 1 hour.' Below this text is a yellow button labeled 'Reset Your Password'. At the bottom, there is a URL: 'https://impl.workday.com/r2rhub1/login.html?fpOneTimeToken=y98d9p530o0vv17ja6buldlaq175i9n3fjkg1bx88fg1ybp5d6nkmud9pmrvfg8rj6enmlz2o92wjxfvillormydlis12nsdtof&redirect=...'. The Workday logo is at the bottom left of the email content.

9. Click on the "Reset Your Password" link provided in the email

10. Provide your new password

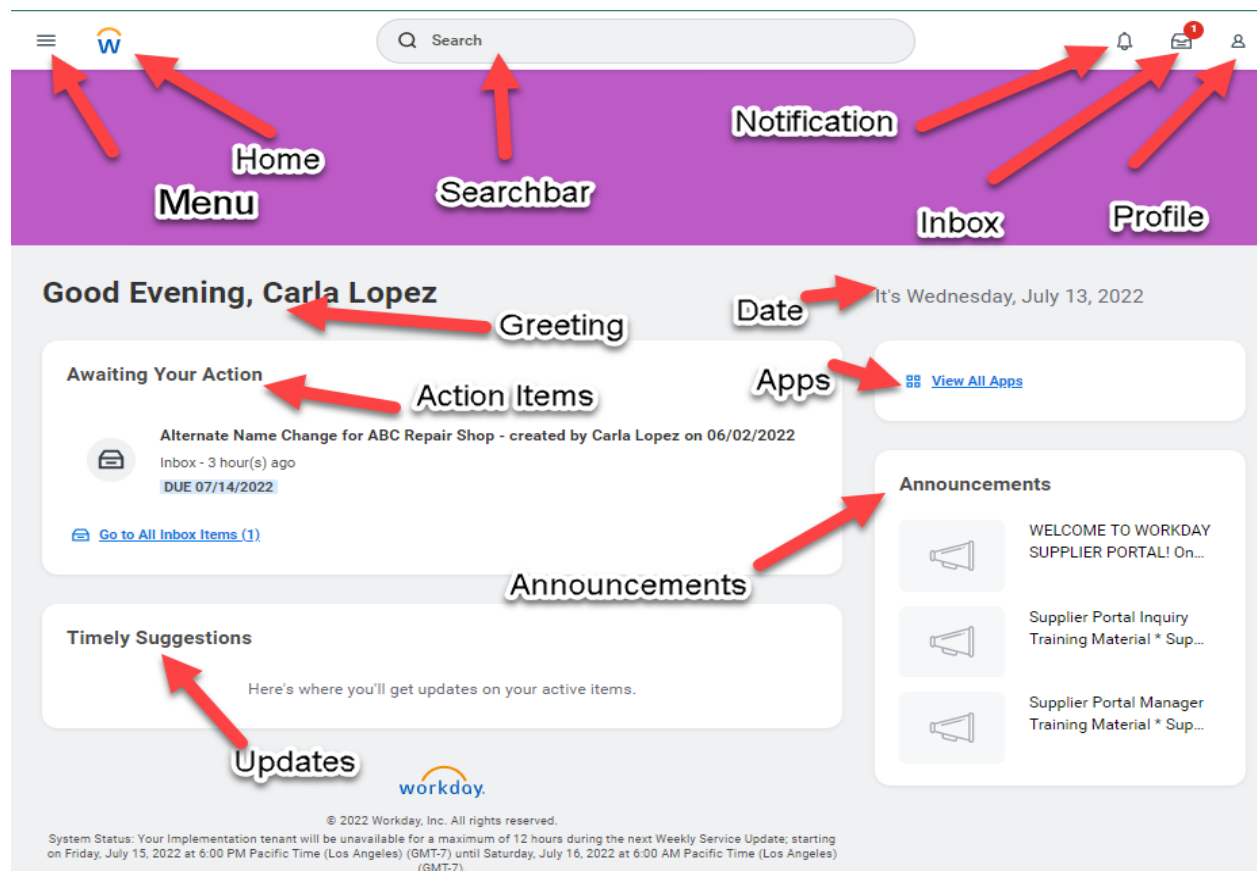


The screenshot shows the Workday 'Change Password' interface. At the top, the Workday logo is displayed on a blue background. Below the logo, the title 'Change Password' is centered. The form contains two input fields: 'New Password' and 'Verify New Password', both with masked characters (asterisks). A 'Submit' button is located at the bottom of the form.

11. Once reset you will be directed back to the Workday login page for regular sign in

## Navigation- Homepage

The homepage provides navigation to the functions used in the Workday Portal.



### Awaiting Your Action

These items require immediate attention and are usually actions that require a submission to be reviewed and resubmitted by a portal manager. These items can also be viewed by clicking “Go to All Inbox Items” or by clicking the Inbox icon in the upper right corner of the page.

### Timely Suggestions

In this section you will receive updates on your active items.

### View All Apps

All available apps can be viewed using this section. You may also organize these apps according to your preferences by clicking Manage Apps

### Announcements

The Announcements section contains a welcome message and training materials. Please review this section frequently for new announcements.

### Inbox and Notifications

The inbox and notifications section will be used most frequently to communicate with our Supplier Maintenance Team regarding your change requests submitted in the supplier portal. Please check your inbox and notifications frequently.

## Workday Portal User Role Types

There are three types of user roles as outlined below. Access to areas of the portal and abilities within the portal will differ based on the user's role type

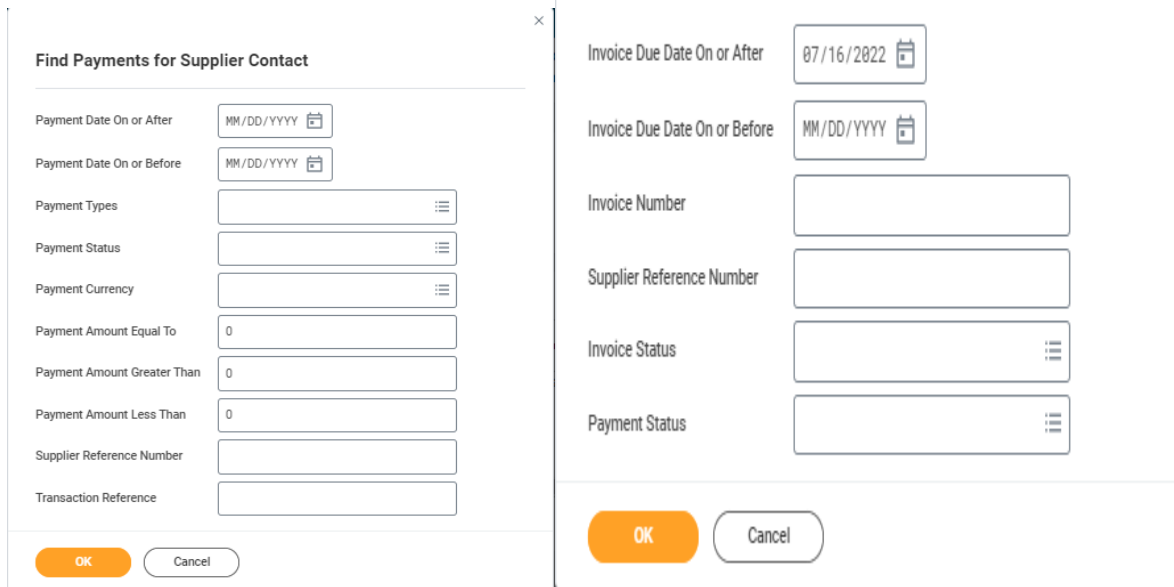
- **Supplier Portal Manager** – This role can view and edit banking information and contact information and can view invoice and payment activity. This role can also manage user access by adding and removing users within your company via a request form
- **Supplier Portal Manager (High Capacity Record)** – This role can also view and edit banking information and contact information and is done via a request form. This role can view invoice and payment activity and manage user access by adding and removing users within your company via a request form. This role is used for supplier records that contain a large number of remittance addresses and supplier data to ensure supplier portal performance is optimal. Please refer to the Supplier Portal Manager (High Capacity Record) section of this manual for guidance and navigation of the supplier portal
- **Supplier Portal Inquiry** – This role can view contact information and invoice and payment activity. This role cannot edit information or request updates to information.

## Invoices and Payments

1. From the homepage, select the menu in the upper left corner of the screen.
2. When the Apps Menu appears, select Invoices and Payments.

**NOTE:** This dashboard is a quick view of the 10 most recent Invoices and Payments. For additional search options in this section there is a search menu available.

3. To view more details about an invoice, click the invoice number in blue
4. To view more details about a payment, click View next to the Payment column
5. To search for invoices and/or payments, click Find Invoices for Supplier Contact or Find Payments for Supplier Contact



## Remittance Notices- Email and Portal Notifications

### Most Recent Invoices

1. Invoices are hyperlinked and are displayed in blue which will then display additional details about the invoice
2. The detailed view allows you to review the Invoice Information, Terms and Taxes, and Invoice Reference Information.

### Most Recent Payments

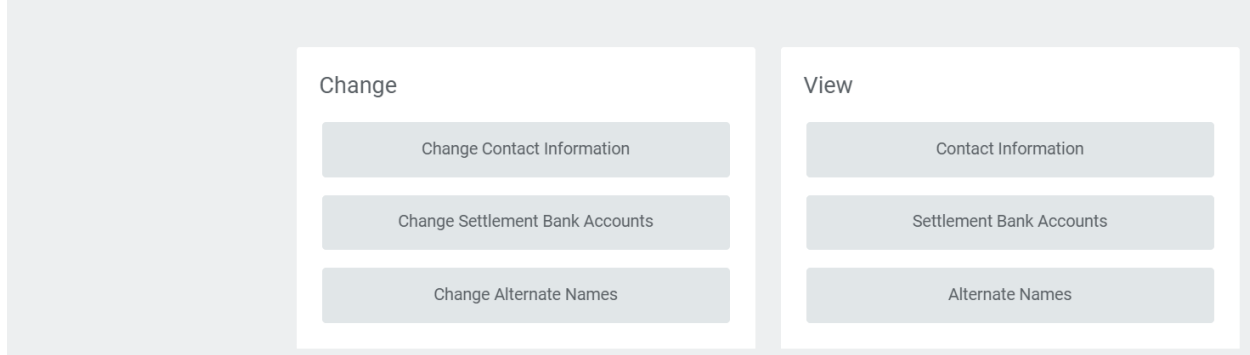
3. Most recent payments are listed in order from most recent to oldest in the table
4. When you click view, you will be redirected to a detailed payment screen which contains details about the Payment Information, Payment Detail, and the Payment Status.

## Contact and Banking

### General Information

1. The Contact and Banking tab can be found from the Homepage by clicking the menu in the upper left corner.
2. Select Contact and Banking.
3. “Change” actions can be used to add to or update your supplier information. “View” is used to view the current information on file. You cannot make changes within the View section.

**Contact and Banking**



4. If changes are made using the “Change” actions, your request will be sent to our Supplier Maintenance Team for processing

**Change (For Portal Manager Users only)**

The Change section is broken down into three sections:

- Change Contact Information – Used to make changes to phone numbers, address information, and email addresses
- Change Settlement Bank Accounts – Used to make changes to bank account information including routing number, account number, bank name, and account type
- Change Alternate Names – Used to make changes to your legal reporting name for your company. This change requires a W-9 form

**Change Contact Information (For Portal Manager Users only)**

This action is used to add new or make changes to phone numbers, addresses, and email addresses

1. From the Home Page, click View All Apps and then click Contact and Banking
2. Click Change Contact Information
3. Click OK
4. Update, add, or remove contact information as needed.
  - a. To add new contact information, click Add under each section that you would like to add new information for
  - b. To update/correct contact information click within the fields that require correction and type in the fields
  - c. To remove contact information, click the Delete checkbox
5. Attachments can be included by clicking the Attachments tab, click Upload, and select a file
6. When changes are complete, click submit, and then Done
7. The change request will now be sent to Progressive’s Supplier Maintenance Team for processing

**NOTE: If a change is started but is no longer needed you must cancel the request by following the process titled “I started a change request and want to cancel it” starting on page 24. This is important to ensure that other users within your company can complete update requests as needed**

### Change Settlement Bank Accounts (For Portal Manager Users only)

This action is used to add new or make changes to bank account information such as account number, routing number, bank name, and account type

1. From the Home Page, click View All Apps and then click Contact and Banking
2. Click Change Settlement Bank Accounts
3. Click OK
4. Add or update banking information as needed
  - a. To correct banking information, overwrite the existing fields by typing within the fields and click Submit once finished
  - b. To add new banking information, click the + icon in the left corner of the table and a blank section will appear.
  - c. To remove banking information, click the "Delete" check box in the section of the banking information you would like to remove. Please note that this change will result in this banking information being removed from all payment remittance locations on your supplier record with Progressive
5. The following fields are required fields, please do not enter information in other fields:
  - i. Account Type (checking or savings)
  - ii. Check the For Supplier Connections Only box
  - iii. Country = United States of America (please note that Progressive cannot currently accept international bank account set ups)
  - iv. Routing Transit Number
  - v. Bank Name
  - vi. Account Number
  - vii. Please attach a copy of a voided check, bank letter, or portion of a bank statement that contains your full account number, routing number, bank name, and account holder name using the Attachments tab.
  - viii. Click Submit, a message and a comments box will appear
  - ix. Enter the remittance address that this banking applies to in the 'Comments' box near the bottom of the page

**NOTE:** Banking changes require a voided check, bank letter, or top portion of bank statement attachment for security purposes. Attachment must show full account and routing numbers, account holder name, and the bank name.

6. Click Submit once finished and your request will be sent to Progressive's Supplier Maintenance Team for processing

**NOTE: If a change is started but is no longer needed you must cancel the request by following the process titled "I started a change request and want to cancel it" starting on page 24. This is important to ensure that other users within your company can complete update requests as needed**

### Change Alternate Names (For Portal Manager Users Only)

This action is used to update your legal reporting or tax name associated with your supplier record. This is the name that is typically found on line 1 of your company's W-9 form

1. From the Home Page, click View All Apps and then click Contact and Banking

2. Click Change Alternate Names
3. Add or update Alternate Name as needed
  - a. To update the tax/legal reporting name, click in the Name field and type the new name
4. Attach a W-9 form within the Attachments tab
5. Click Submit once finished. Your request will be sent to Progressive’s Supplier Maintenance Team for processing

**NOTE: If a change is started but is no longer needed you must cancel the request by following the process titled “I started a change request and want to cancel it” starting on page 24. This is important to ensure that other users within your company can complete update requests as needed**

### View

#### View Contact Information (Portal Manager and Portal Inquiry User Roles)

Contact information can also be viewed without the need to create a change request. A summary of phone numbers, addresses, and email addresses can be viewed in this area

1. From the Home Page, click View All Apps, click Contact and Banking
2. Click Contact Information under the ‘View’ section

### PHONE

Phone 3 items X [Filter] [Grid] [List] [Refresh]

Phone Number	Phone Type	Usage	Visibility
--------------	------------	-------	------------

### ADDRESS

Address 4 items X [Filter] [Grid] [List] [Refresh]

Address	Usage	Visibility	Effective Date	Address Reference ID
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### EMAIL

Email 3 items X [Filter] [Grid] [List] [Refresh]

Email Address	Usage	Visibility
---------------	-------	------------

#### View Settlement Bank Accounts (Portal Manager Users Only)

Limited banking information can also be viewed without the need to create a change request. A summary of banking information can be viewed in this area. If you would like to view full banking information, please refer to the section above for Change Settlement Bank Accounts

1. From the Home Page, click View All Apps, click Contact and Banking
2. Click Settlement Bank Accounts under the ‘View’ section



**Settlement Bank Accounts**

Settlement Bank Account 1 item

Account Nickname	Bank Name	Account Type	Account Number	Supplier Connection Payment Types	Prenote Status	Inactive
TEST BANK 10 *****6681	TEST BANK 10	Checking	*****6681		None	No

**View Alternate Names (Portal Manager and Portal Inquiry User Roles)**

The tax/legal reporting name can be viewed in this area without the need to create a change request

1. From the Home Page, click View All Apps, click Contact and Banking
2. Click Alternate Names under the 'View' section

**Alternate Names**

**Primary Name**

Primary Name MOORES AUTO BODY AND COLLISION

- Usage
- Alternate Supplier Connection
  - Connection Integration Name
  - Connection Purchase Order Name
  - Doing Business As
  - EDI Integration Name
  - More (6)

Alternate Names 1 item

Name	Usage
A NEW COLLISION COMPANY	1099 Recipient

**Add/Delete User Requests (Portal Manager Users Only)**

This form can be used to manage supplier portal access for your company. Use this form to add new users or remove users

1. From the Home Page, click View All Apps and then Supplier Portal Request
2. On the next page, click Add/Delete User Request under the Workday User Account Request section
3. Click the drop down next to Request Type, click All, Select Supplier Portal – Add/Delete User, click OK

**NOTE:** Only Portal Manager users can complete this function. If you require new access or need your access type updated, please contact a Portal Manager user within your company to submit the Add/Delete User Request form within the Workday Supplier Portal.

4. A blank request form will open

**To add a new user please follow these steps and fill in the fields accordingly:**

1. Add or Delete User (Required): Select **Add**
2. Effective Date (Required): Enter **today's date**
3. Supplier Name (Required): Enter your **company name** here. This is the name that Progressive makes payments to and can also be found under the View Alternate Names area of the Workday Portal. Your supplier name is listed as the 'Primary Name' on the left side of the Alternate Names page

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4. Supplier Number (Required): Please enter your **Progressive supplier number** in this field. If you are unsure of your supplier number, it can be found on the PDF file within the remittance notification emails. If you require assistance locating your supplier number, please contact our Supplier Maintenance Team at [ClaimsSupplierSupport@Progressive.com](mailto:ClaimsSupplierSupport@Progressive.com). You may also enter a '1' in the supplier number field and enter a comment near the bottom of the form and notify the Supplier Maintenance Team to include your supplier number with the completion notification. Please be sure to include your full supplier name in the Supplier Name field within this form
5. Please enter User First Name, Last Name, M.I. (Required): Enter the **full name** of the person you would like to grant supplier portal access to (middle initial is not required)
6. Type of User Access (Required): Select the type of role you would like to set up for this new user. Please read the role descriptions carefully:
  - a. Supplier Portal Manager – This role can view invoice and payment information. This role can also view and edit contact information, banking information, and alternate names. This role can submit the Add/Delete User Request form to add, remove, or change user access
  - b. Supplier Portal Inquiry – This role can view invoice and payment information, contact information, and alternate names. This role cannot edit information or submit change requests
7. User email address (Required): Enter the email address of the person you are granting portal access to. This is the email address where login information and other notifications will be sent
8. User Phone with area code (10 digit number only): Enter the phone number of the person you are granting portal access to. A phone number is not required
9. Enter any additional information you would like to provide in the comments box at the bottom of the form (not required). You may also provide attachments if you wish by using the Attachments section at the bottom of the form
10. Click Submit. Your request will now be sent to Progressive's Supplier Maintenance Team for processing.
  - a. You will receive a completion notification once your request has been completed in the Notifications section of Workday. This can be found by clicking the bell icon in the top right corner of the page.
  - b. If Supplier Maintenance requires additional information or corrections, your form will be sent back to you for revisions in your Inbox within Workday. This can be found by clicking the Inbox icon in the top right corner of the page

**To delete an existing user, please follow these steps and fill in the fields accordingly:**

1. Add or Delete User (Required): Select **Delete**

**NOTE: Please note that the user's access will be removed immediately, please submit this form only when ready to remove access immediately**

2. Effective Date (Required): Enter **today's date**

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3. **Supplier Name (Required)**: Enter your **company name** here. This is the name that Progressive makes payments to and can also be found under the View Alternate Names area of the Workday Portal. Your supplier name is listed as the 'Primary Name' on the left side of the Alternate Names page
4. **Supplier Number (Required)**: Please enter your **Progressive supplier number** in this field. If you are unsure of your supplier number, it can be found on the PDF file within the remittance notification emails. If you require assistance locating your supplier number, please contact our Supplier Maintenance Team at [ClaimsSupplierSupport@Progressive.com](mailto:ClaimsSupplierSupport@Progressive.com). You may also enter a '1' in the supplier number field and enter a comment near the bottom of the form and request that the Supplier Maintenance Team include your supplier number with the completion notification. Please be sure to include your full supplier name in the Supplier Name field within this form
5. **Please enter User First Name, Last Name, M.I. (Required)**: Enter the **full name** of the person you would like to remove supplier portal access from (middle initial is not required)
6. **Type of User Access (Required)**: Select the type of role the user currently has:
  - a. Supplier Portal Manager – This role can view invoice and payment information. This role can also view and edit contact information, banking information, and alternate names. This role can submit the Add/Delete User Request form to add, remove, or change user access
  - b. Supplier Portal Inquiry – This role can view invoice and payment information, contact information, and alternate names. This role cannot edit information or submit change requests
7. **User email address (Required)**: Enter the email address of the person you are removing portal access from
8. **User Phone with area code (10 digit number only)**: Enter the phone number of the person you are removing portal access from (not required)
9. Enter any additional information you would like to provide in the comments box at the bottom of the form (not required). You may also provide attachments if you wish by using the Attachments section at the bottom of the form
10. Click Submit. Your request will now be sent to Progressive's Supplier Maintenance Team for processing.
  - a. You will receive a completion notification once your request has been completed in the Notifications section of Workday. This can be found by clicking the bell icon in the top right corner of the page.
  - b. If Supplier Maintenance requires additional information or corrections, your form will be sent back to you for revisions in your Inbox within Workday. This can be found by clicking the Inbox icon in the top right corner of the page

**To change an existing user's access type, please follow these steps and fill in the fields accordingly:**

1. **Add or Delete User (Required)**: Select **Add**

## Workday Supplier Portal Procedures Manual

2. Effective Date (Required): Enter **today's date**
3. Supplier Name (Required): Enter your **company name** here. This is the name that Progressive makes payments to and can also be found under the View Alternate Names area of the Workday Portal. Your supplier name is listed as the 'Primary Name' on the left side of the Alternate Names page
4. Supplier Number (Required): Please enter your **Progressive supplier number** in this field. If you are unsure of your supplier number, it can be found on the PDF file within the remittance notification emails. If you require assistance locating your supplier number, please contact our Supplier Maintenance Team at [ClaimsSupplierSupport@Progressive.com](mailto:ClaimsSupplierSupport@Progressive.com). You may also enter a '1' in the supplier number field and enter a comment near the bottom of the form to notify the Supplier Maintenance Team to include your supplier number with the completion notification. Please be sure to include your full supplier name in the Supplier Name field within this form
5. Please enter User First Name, Last Name, M.I. (Required): Enter the **full name** of the person you would like to update access type for (middle initial is not required)
6. Type of User Access (Required): Select the type of role you would like to set up for this user. Please read the role descriptions carefully:
  - a. Supplier Portal Manager – This role can view invoice and payment information. This role can also view and edit contact information, banking information, and alternate names. This role can submit the Add/Delete User Request form to add, remove, or change user access
  - b. Supplier Portal Inquiry – This role can view invoice and payment information, contact information, and alternate names. This role cannot edit information or submit change requests
7. User email address (Required): Enter the email address of the person you are updating portal access for. This is the email address where login information and other notifications are sent
8. User Phone with area code (10 digit number only): Enter the phone number of the person you are updating portal access for. A phone number is not required
9. Enter any additional information you would like to provide in the comments box at the bottom of the form (not required). You may also provide attachments if you wish by using the Attachments section at the bottom of the form
10. Click Submit. Your request will now be sent to Progressive's Supplier Maintenance Team for processing.
  - a. You will receive a completion notification once your request has been completed in the Notifications section of Workday. This can be found by clicking the bell icon in the top right corner of the page.
  - b. If Supplier Maintenance requires additional information or corrections, your form will be sent back to you for revisions in your Inbox within Workday. This can be found by clicking the Inbox icon in the top right corner of the page

## Supplier Portal Manager (High Capacity Record)

This role can view and edit banking information and contact information and is done via a request form. This role can view invoice and payment activity and manage user access by adding and removing users within your company via a request form. This role is used for supplier records that contain a large number of remittance addresses and supplier data to ensure supplier portal performance is optimal.

### View Invoices and Payments

Refer to the process starting on page 11

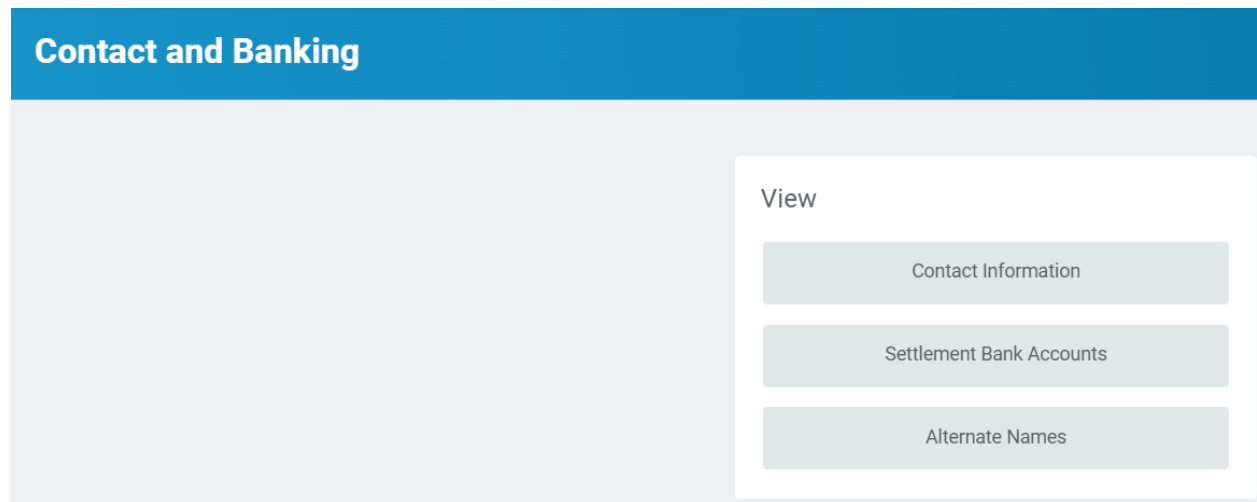
### Add/Delete User Requests

Refer to the process starting on page 15

## Contact and Banking Information

### General Information


5. The Contact and Banking tab can be found from the Homepage by clicking the menu in the upper left corner.
6. Select Contact and Banking.
7. The “View” section is used to view the current information on file for your company. You cannot make changes within the View section, please follow the processes below to request updates to your information



### Change Contact Information (For Portal Manager (High Capacity Record) Users only)

This action is used to add new or make changes to phone numbers, addresses, and email addresses

1. From the Home Page, click View All Apps, click Supplier Portal Request, click Supplier Change Requests, select All in the drop-down box, and select Contact Information Change Request Form. Click OK

2. A new request form will open
3. Add or remove contact information as needed using the fields within the form.
  - a. To add new contact information, click Add new Contact Information under the Request Type field and enter the contact information within the form that you wish to add.
  - b. To remove contact information, click Remove Contact Information under the Request Type field and enter the contact information within the form that you wish to remove.
4. Attachments can be included by clicking the Attachments tab, click Upload, and select a file. You may also include any additional comments by using the comments box near the bottom of the form
5. Once finished, click Submit
6. The request form will now be sent to Progressive's Supplier Maintenance Team for processing. You will receive a completion notification once your request has been processed.
  - a. If additional information is needed, our team will send the form back to you to request additional information in your Workday portal inbox  located in the upper right corner of the page. Review comments at the bottom of the form and enter the necessary corrections, and click Submit to send the form back to Progressive's Supplier Maintenance Team for processing

#### Change Settlement Bank Accounts (For Portal Manager (High Capacity Record) Users only)


This action is used to add new or make changes to bank account information such as account number, routing number, bank name, and account type

1. From the Home Page, click View All Apps, click Supplier Portal Request, click Supplier Change Requests, select All in the drop-down box, and select Settlement Bank Account Change Request Form. Click OK
2. A new request form will open
3. Add or remove banking information as needed
  - a. To add new banking information, select Add a New Bank Account under the Add or Remove Bank Account section of the form and enter your new banking information in the rest of the fields
  - b. To remove banking information, select Remove an Existing Bank Account under the Add or Remove Bank Account section of the form and enter the banking information you would like to remove within the rest of the fields

**NOTE:** Banking changes require a voided check, bank letter, or top portion of bank statement attachment for security purposes. Attachment must show full account and routing numbers, account holder name, and the bank name.


4. Attach bank document in the Attachments section near the bottom of the form by clicking Select Files, selecting a document, and clicking Open. Your file will be listed under the Attachments section as Successfully Uploaded with a green check mark

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5. Enter any additional information or comments you would like to provide in the comments box near the bottom of the form
7. Once finished click Submit. If a window notification appears, click Revise and then click Submit again. The request form will now be sent to Progressive's Supplier Maintenance Team for processing. You will receive a completion notification once your request has been processed.
  - a. If additional information is needed, our team will send the form back to you to request additional information in your Workday portal inbox  located in the upper right corner of the page. Review comments at the bottom of the form and enter the necessary corrections, and click Submit to send the form back to Progressive's Supplier Maintenance Team for processing

### Change Alternate Names (For Portal Manager (High Capacity Record) Users Only)

This action is used to update your legal reporting or tax name associated with your supplier record. This is the name that is typically found on line 1 of your company's W-9 form

1. From the Home Page, click View All Apps, click Supplier Portal Request, click Supplier Change Requests, select All in the drop-down box, and select Alternate Name Change Request Form. Click OK
2. A new request form will open
3. Fill out the fields within the form and provide your company's new legal reporting name/tax name
4. Attach a W-9 form within the Attachments section by clicking Select Files, choose a file, and click Open. Your file will be listed under the Attachments section as Successfully Uploaded with a green check mark
5. Enter any additional information or comments you would like to provide in the comments box near the bottom of the form
6. Once finished click Submit. If a window notification appears, click Revise and then click Submit again. The request form will now be sent to Progressive's Supplier Maintenance Team for processing. You will receive a completion notification once your request has been processed.
  - b. If additional information is needed, our team will send the form back to you to request additional information in your Workday portal inbox  located in the upper right corner of the page. Review comments at the bottom of the form and enter the necessary corrections, and click Submit to send the form back to Progressive's Supplier Maintenance Team for processing

### View

#### View Contact Information (All Roles)

Contact information can also be viewed without the need to create a change request. A summary of phone numbers, addresses, and email addresses can be viewed in this area

1. From the Home Page, click View All Apps, click Contact and Banking

2. Click Contact Information under the 'View' section

**PHONE**

Phone 3 items

Phone Number	Phone Type	Usage	Visibility
--------------	------------	-------	------------

**ADDRESS**

Address 4 items

Address	Usage	Visibility	Effective Date	Address Reference ID
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**EMAIL**

Email 3 items

Email Address	Usage	Visibility
---------------	-------	------------

**View Settlement Bank Accounts (Portal Manager (High Capacity Record) Users Only)**  
 Limited banking information can also be viewed without the need to create a change request. A summary of banking information can be viewed in this area.

1. From the Home Page, click View All Apps, click Contact and Banking
2. Click Settlement Bank Accounts under the 'View' section

**Settlement Bank Accounts**

Settlement Bank Account 1 item

Account Nickname	Bank Name	Account Type	Account Number	Supplier Connection Payment Types	Prenote Status	Inactive
TEST BANK 10 *****6681	TEST BANK 10	Checking	*****6681		None	No

**View Alternate Names (All Roles)**

The tax/legal reporting name can be viewed in this area without the need to create a change request

1. From the Home Page, click View All Apps, click Contact and Banking
2. Click Alternate Names under the 'View' section

**Alternate Names**

Primary Name

Primary Name MOORES AUTO BODY AND COLLISION

Usage Alternate Supplier Connection  
 Connection Integration Name  
 Connection Purchase Order Name  
 Doing Business As  
 EDI Integration Name  
 More (6)

Alternate Names 1 item

Name	Usage
A NEW COLLISION COMPANY	1099 Recipient



## Troubleshooting

### ***“I can’t submit changes to my supplier information and received an error message”***

- If the error message below has populated, then there is already a change in progress by another portal user within your company. Once the in-progress change request has been submitted, our Supplier Maintenance team will process the request.

**Change Contact Information**

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A Supplier Change submitted by someone else is currently in progress. Try again later after it is finished.

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### ***“I started a change request and want to cancel it”***

- Click Cancel within the open change request

**Change Contact Information**

Change Event Contact Information Change for MOORES AUTO BODY AND COLLISION - created by LUCY MOORE on 12/29/2022

Status Draft

Contact Information Attachments

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**Phone**

Delete

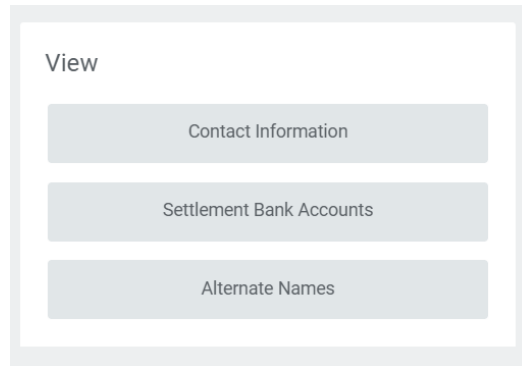
Country Phone Code \*


Phone Number \*

Phone Extension

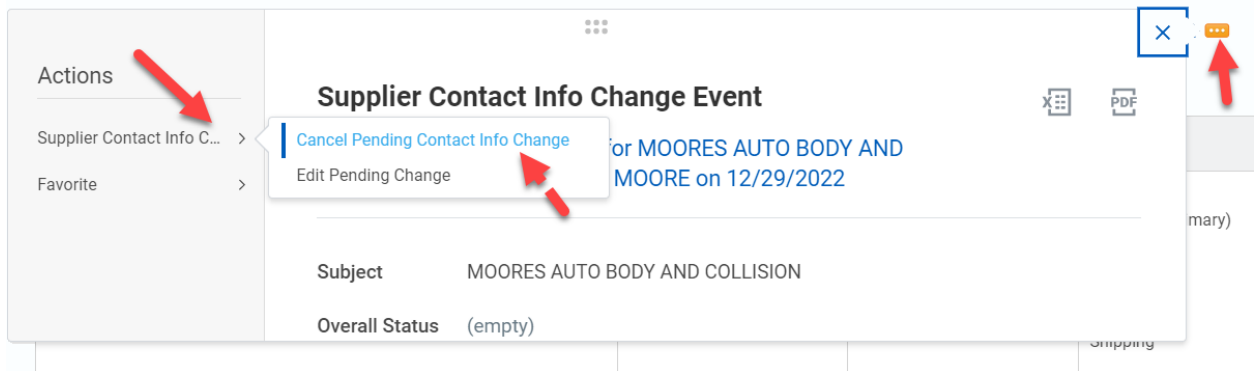
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- Click the appropriate section under the View section of the Contact and Banking page



- Click the  icon, hover your cursor over Supplier Contact Info Change, select Cancel Pending Contact Info Change, and click OK.

**Contact Information**



**“I keep receiving an error message when I try to submit new banking information”**

- If the error message below has populated, click the “For Supplier Connections Only” box within the banking entry screen and try clicking Submit again. Please be sure that you have included your bank document attachment and the remittance address that this new banking applies to in the ‘Comments’ section near the bottom of the page. Please see the Change Settlement Bank Accounts section of this procedures manual for the full process.

**Error**

1. Page Error  
Only one active Settlement Bank Account not marked for deletion can exist with no Payment Type selected.



**For Supplier Connections Only**

