EXIM Online (EOL) Essentials:

An Introductory Guide for Brokers

Table of Contents

| Welcome to EXIM Online (EOL) | ................................................................. 2 |
| • What products are used on EOL? | ................................................................. 2 |
| • What tasks can be performed on EOL? | ................................................................. 2 |
| • Best practices when using EOL | ................................................................. 2 |
| • Where can I find EOL? | ................................................................. 3 |
| How do I get an EOL account? | ................................................................. 3 |
| Creating a customer’s new user account | ................................................................. 4 |
| Creating additional customer user accounts | ................................................................. 6 |
| What if I forget my User ID or password, or get locked out of my account? | ................................................................. 8 |
| Appointing a broker to the customer’s account | ................................................................. 8 |
| Associating a broker with a customer’s specific insurance application | ................................................................. 9 |
| • For Express Insurance: | ................................................................. 10 |
| • For other Multi-Buyer (ENB), Single Buyer (ESS), Financial Institution Buyer Credit (FIBC), and Medium-Term policies: | ................................................................. 12 |
| • For Letter of Credit (ELC) policy: | ................................................................. 13 |
| Customer landing page | ................................................................. 13 |
| Broker landing page | ................................................................. 14 |
| Adding or changing a broker on an existing policy | ................................................................. 14 |
| Where to find help while using EOL | ................................................................. 16 |

Revised September 2017
Welcome to EXIM Online (EOL)

This document will help you to get started using our online application and policy management system. Basic tasks will be explained step-by-step, including creating new accounts, how your customer can appoint you as their broker in EOL, and where to get assistance.

What products are used on EOL?

- Multi-buyer insurance policies for exporters
  - Express Insurance
  - Small Business Multi-buyer (ENB)
  - Small Business Environmental (ENV)
  - Standard Multi-buyer (ESC)
- Exporter Single Buyer (ESS)
- Financial Institution Buyer Credit (FIBC)
- Bank Letter of Credit (ELC)
- Medium-term Insurance
- Medium-term Bank Guarantee

What tasks can be performed on EOL?

- Exporter can assign a broker to their EOL account and a specific application
- Exporter/broker can complete an application for a new policy, or a Special Buyer Credit Limit (SBCL)
- View status of pending applications submitted to EXIM
- Accept a quote
- Pay premium
- View and print in-force policies and policy documentation
- Report shipments and overdues
- Broker can view all policies and commissions
- File a claim

Best practices when using EOL

- We strongly advise against sharing and letting others use your User ID and password
  - EOL assumes the person entering information is the person to whom that User ID and password were issued
  - Sharing ID’s and passwords can create confusion if there is a need to reconstruct somebody’s activity in EOL
- Notify the Director of Broker Relations when there are changes to account users (e.g. add, delete, revise user details). EOL accounts cannot be deleted, but they can be deactivated to prevent someone from using them. They can also be reactivated if
necessary. In both cases, the primary contact for the brokerage should email BAPIMT@exim.gov with the appropriate request, and copy the Director of Broker Relations.

- When a new broker user account is established, or an account is being reactivated, the primary contact for the brokerage should advise EXIM if commission viewing access rights should be granted to that user.

**Where can I find EOL?**


**How do I get an EOL account?**

The “Primary Contact” for a brokerage firm is given an EOL user account when the firm first becomes a registered broker. Afterwards, additional individual brokers with that firm can receive an EOL user account. The “Primary Contact” for the firm who submitted the original brokerage registration should send an email to the Director of Broker Relations requesting that a new user account be set up, and indicate whether the individual should have commission viewing rights. An EOL account will be created for the broker, who will then receive an email with instructions on how to access EOL and complete their EOL profile.

If the brokerage firm wants different offices to receive their own commissions directly from EXIM Bank, those offices must each separately complete the broker application and registration process. Each office will receive its own broker registration number, and the person registering for that office becomes the “Primary Contact” for that office.
Once the brokerage is registered and entered into EOL, the firm is added to the list of registered brokers in EOL that customers may use to assign a broker to their account and specific applications.

**Creating a customer’s new user account**

For new customers you will need to assist them in registering and naming you as their broker. We strongly encourage you to walk through these steps with your customer to insure proper access to their applications and policies in EOL.

1. The customer should click on the “Register for a user account” link after which they will be prompted to accept the terms of use. They will need their DUNS number and primary NAICS code.

2. If the customer is new to EOL, they should answer “No” to the question “Does your Company already have an EXIM Online Account?”
3. The customer completes the details for their EOL profile and clicks “Continue”.

4. The customer will then be prompted to enter contact details, and select a User ID, password and challenge question. Then press “Continue”. This person will be the “Primary Contact” for the new customer’s account for all general correspondence. The customer can change the primary contact by calling the Credit Applications & Processing Division at (202) 565-3800. The customer should not use your broker email address for their EOL account.
5. The customer will then receive a confirmation indicating that the user account was created and that a confirmation email has been sent. Remind the customer to record their User ID and password in a safe location. The customer may then proceed to log in to the new account.

Creating additional customer user accounts

Your customer may create additional user accounts so multiple people can access EOL. Those additional users will need the customer’s registration number, which was created when the company first set up an account in EOL. The person designated by your customer as its “Primary Contact” can find the registration number in his/her EOL account under the “My Company Profile” link on their company’s landing page. Remind your customer to record the registration number and keep it in a safe location in case they get locked out of their EOL account or need to re-set a password.

1. To set up additional users, the customer should click on the “Register for a user account” link after which they will be prompted to accept the terms of use.
2. Since the customer already has an EOL account, they should answer “Yes” to the question “Does your Company already have an EXIM Online Account”?

![Image of Create User Account screen]

3. The user should enter their company’s registration number and zip code.

![Image of Create User Account screen]

4. The user will then be prompted to enter contact details, and select a User ID, password, and challenge question. Then press “Continue”. The user will receive a confirmation that the user account was created and that a confirmation email has been sent. The user may then proceed to log in to the new account.

![Image of User Profile Confirmation]

---

Rev. September 2017  
EXPORT-IMPORT BANK OF THE UNITED STATES
What if I forget my User ID or password, or get locked out of my account?

1. **If you or your customer forget a User ID**, you/your customer should send an email to BAPIMT@exim.gov with the individual’s name, the company’s name, and the email address and ask to have the User ID emailed.

2. **If you or your customer forget a password**, from the log-in page, you/your customer should click on the link “Forgot your password?” Enter the User ID and email address to receive an email with a link to re-set the password. Before a password can be re-set, the individual will be asked to answer the challenge question established when the account was first created. If the individual cannot answer the challenge question, send an email to BAPIMT@exim.gov.

3. **NOTE**: You or your customer will be temporarily locked out of your respective accounts after three failed attempts to access it. Wait twenty minutes and try again.

---

**Welcome to EXIM Online**

**Already a user? Please sign in.**

- **User Id:**
- **Password:**
- Login
- Forgot your password?
- Register for a user account.

---

**Appointing a broker to the customer’s account**

Before you can have access to your customer’s account, the customer must appoint you as their broker to their account. This can be done in two ways. The first way is for the customer to make a general appointment of your company as discussed below in this section. The second way is for the customer to appoint your company to a specific application as discussed in the next section. We strongly encourage you to walk through these steps with new customers to insure you are properly associated with their company.
1. On the customer’s landing page, the customer should click on “Maintain Broker”.

2. The customer then opens the drop-down box, selects your firm from the list of brokers, and clicks “Add Broker”. Your company will now appear on the list of brokerages already associated with your customer’s account (if any). You will now be able to initiate applications for the customer in EOL.

Associating a broker with a customer’s specific insurance application

The second way a customer can appoint your company as their broker is by associating your company with a specific application for insurance.

1. The customer initiates the application from their landing page by clicking on “Apply for Insurance or Medium-Term Guarantee”.

   ![Image 1](image1.png)

   ![Image 2](image2.png)
2. Then the customer selects the type of policy from the drop-down menu and clicks “Continue”. This will take the customer to the instructions page for the application.

3. The location of the link for the customer to appoint your company on the application depends on the type of policy.

For Express Insurance:

a) Select “Short-Term Multi-Buyer Insurance” as above and then “Start Express Application”.

---

**EXIM Online (EOL) Essentials: An Introductory Guide for Brokers**

**EXPORT-IMPORT BANK OF THE UNITED STATES**

**Rev. September 2017**
b) To access the link to appoint your company, the customer clicks either “Continue” or the “Company Info” link.

c) The customer selects your company from the drop-down list of all registered brokers, and clicks “Save and Exit”. Your company is now associated with the customer’s account, and you have access to the application in EOL. Note that the customer will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. The customer should not select either of these unless they want that organization to have access to its application. They can be added later.
For other Multi-Buyer (ENB), Single Buyer (ESS), Financial Institution Buyer Credit (FIBC), and Medium-Term policies:

a) After selecting one of the policy types as shown earlier, the customer selects the “Access Rights” link.

b) Then the customer selects your company from the drop-down list of all registered brokers, and clicks “Save and Exit”. Your company is now associated with the customer’s account, and you have access to the application in EOL. Note that the customer will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. They should not select either of these unless they want the organization to have access to its application. They can be added later.

Do not select either of these unless you want the organization to have access to your application. You may want to use this option if you assign your policy proceeds to a financial institution.
**For Letter of Credit (ELC) policy:**

a) After selecting one of the policy types as shown earlier, the customer selects the “Broker” link.

b) Then the customer selects your company from the drop-down list of all registered brokers, and clicks “Save and Exit”. Your company is now associated with the customer’s account, and you have access to the application in EOL.

---

**Customer landing page**

The first screen that the customer will see after logging on to EOL is the landing page. It is divided into four sections grouped by related functionalities as described below.
Exim Online (EOL) Essentials: An Introductory Guide for Brokers

Broker landing page

The first screen you will see after logging on to EOL is your landing page. It is structured similarly to the customer’s landing page. The differences are:

a) The customer’s landing page has a “Maintain Broker” link under “Miscellaneous”
b) The customer’s landing page has some additional links that are for EXIM Bank guarantees, which are not brokered
c) The broker’s landing page has a “Broker Commissions” link under “Miscellaneous” to view commissions. This link will appear only if you have been granted commission viewing rights by your firm’s primary contact

Note: The “Registered Users” link under Miscellaneous for the customer and the broker will only appear if the user is the designated Primary Contact for the company. Only the Primary Contact may view a list of all registered EOL users with that company.

Adding or changing a broker on an existing policy

The customer can add a broker to an existing policy if they were not using one at the time a policy was issued. They can also change a broker after a policy is issued, in which case the existing broker will receive a communication informing them of the change. A policy must be amended to add or change a broker on an existing policy.

1. From the landing page, the customer clicks “Amend a Policy or Guarantee”.

Note: The “Registered Users” link under Miscellaneous for the customer and the broker will only appear if the user is the designated Primary Contact for the company. Only the Primary Contact may view a list of all registered EOL users with that company.
2. The customer selects the policy they want to amend.

3. The customer clicks “Broker” among the amendment options on the right hand side of the screen.

4. The customer selects the new broker from the dropdown list of other brokers already associated with their company, or from the dropdown list of all EXIM registered brokers. They can review the change before submitting it by clicking “Application Summary”. They may also add any comments by clicking “Comments”. When they are finished, they click “Submit”.

---

**Notes:**

- The customer selects the policy they want to amend.
- The customer clicks “Broker” among the amendment options on the right hand side of the screen.
- The customer selects the new broker from the dropdown list of other brokers already associated with their company, or from the dropdown list of all EXIM registered brokers. They can review the change before submitting it by clicking “Application Summary”. They may also add any comments by clicking “Comments”. When they are finished, they click “Submit”.

---
5. Customer confirms its request by clicking “Submit”.

![Image of the Policy Amendment Application screen]

6. Confirmation of the request will appear with a tracking number. The customer can print this page.

![Image of the Tracking Sheet]

**Where to find help while using EOL**

The “Customer Service” button on the top right of the landing page provides access to comprehensive instructions on how to use all aspects of EOL. Click on the links on the left side of the page to open the associated content, which will appear on the right side of the page. There are also links to Frequently Asked Questions, and an opportunity to provide feedback on your EOL experience. The “Contact Us” section is used only to provide general feedback to EXIM Bank. **DO NOT use this section to ask questions about the status of specific applications or policy related questions. Direct such questions to the appropriate loan officer.**