EXIM Online (EOL) Essentials:
An Introductory Guide for Exporters

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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 a new EOL account, assigning a broker to your account and to an application, 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
- 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
- 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 exporter should email BAPIMT@exim.gov with the appropriate request.
- If you have assigned your broker to your account in EOL (see instructions below), they will be able to access your information and help you manage your EOL account and complete applications.

Where can I find EOL?


How do I get an EOL account?

1. To open an EOL account, find the EXIM Online link on EXIM’s webpage (see above) and click on “Register for a user account”, after which you will be prompted to accept the terms of use. You will need your company’s DUNS number and primary NAICS code.
2. If your company is new to EOL, answer “No” to the question “Does your Company already have an EXIM Online Account?”

3. Complete the details for your EOL profile and click “Continue”.

4. You 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 your company for all general correspondence. Your company can change the primary contact by calling the Credit Applications & Processing Division at (202) 565-3800. Do not use your broker’s contact details.
5. You will then receive a confirmation indicating that the user account was created and that a confirmation email has been sent. Record your User ID and password in a safe location. You may then proceed to log in to the new account.

Creating additional exporter user accounts

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

1. To set up additional users, click on the “Register for a user account” link after which you will be prompted to accept the terms of use.

2. Since your company already has an EOL account, you should answer “Yes” to the question “Does your Company already have an EXIM Online Account?”

3. Enter your company’s registration number and zip code.
4. You will then be prompted to enter contact details, and select a User ID, password, and challenge question as per the previous instructions. Then press “Continue”. You will receive a confirmation that the user account was created and that a confirmation email has been sent. You may then proceed to log in to the new account.

What if I forget my User ID or password, or get locked out of my account?

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

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

3. **NOTE**: You will be temporarily locked out of your account after three failed attempts to access the account. Wait 20 minutes and try again.

Appointing a broker to your account

Before a broker can assist you with an application in EOL, you need to appoint the broker to your account. This can be done in two ways. The first way is for your company to make a
general appointment of the broker as discussed below in this section. The second way is for your company to appoint the broker to a specific application as discussed in the next section.

1. From your landing page click on the “Maintain Broker” link.

2. Open the drop-down box and select your broker from the list, and click on “Add Broker”. The broker will now appear on the list of brokers already associated with your EOL account (if any). The broker will now be able to initiate applications for you in EOL. You can view and remove a broker by clicking on the appropriate links.

Associating a broker with a specific insurance application

The second way to appoint a broker to your account is by associating them with a specific application for insurance.
1. Initiate the application from your landing page by clicking on “Apply for Insurance Policy or Medium-term Guarantee”.

2. Select the type of policy from the drop-down menu and click “Continue”. This will take you to the instructions page for the application.

3. The location of the link to appoint a broker for 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”.

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b) To access the link to assign a broker, click either “Continue” or the “Company Info” link.

c) Select the broker from the drop-down list of all registered brokers, and click “Save and Exit”. That broker is now associated with your company’s account, and will have access to the application in EOL. Note that you 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. Do not select either of these unless you want the organization to have access to your 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, select the “Access Rights” link.

b) Select the broker from the drop-down list of all registered brokers, and click “Save and Exit”. That broker is now associated with your company’s account, and will now have access to the application in EOL. Note that you 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. Do not select either of
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.

Exporter landing page

The first screen that you will see after logging on to EOL is your landing page. It is divided into four sections grouped by related functionalities as described below. The “Registered Users” link under Miscellaneous 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. The Primary Contact will be notified when a new user has been registered.
Adding or changing a broker on an existing policy

You can add a broker to an existing policy if you were not using one at the time a policy was issued. You 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.

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

2. Select the policy you want to amend.

3. Click “Broker” among the amendment options on the right hand side of the screen.
4. Select the new broker from the dropdown list of brokers already associated with your company, or from the drop-down list of all EXIM registered brokers. You can review the change before submitting it by clicking “Application Summary”. You may also add any comments by clicking “Comments”. When you are finished, click “Submit”.

5. Confirm your request by clicking “Submit”.

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