



# EXIM Online (EOL) Essentials:

## An Introductory Guide for Brokers

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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 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

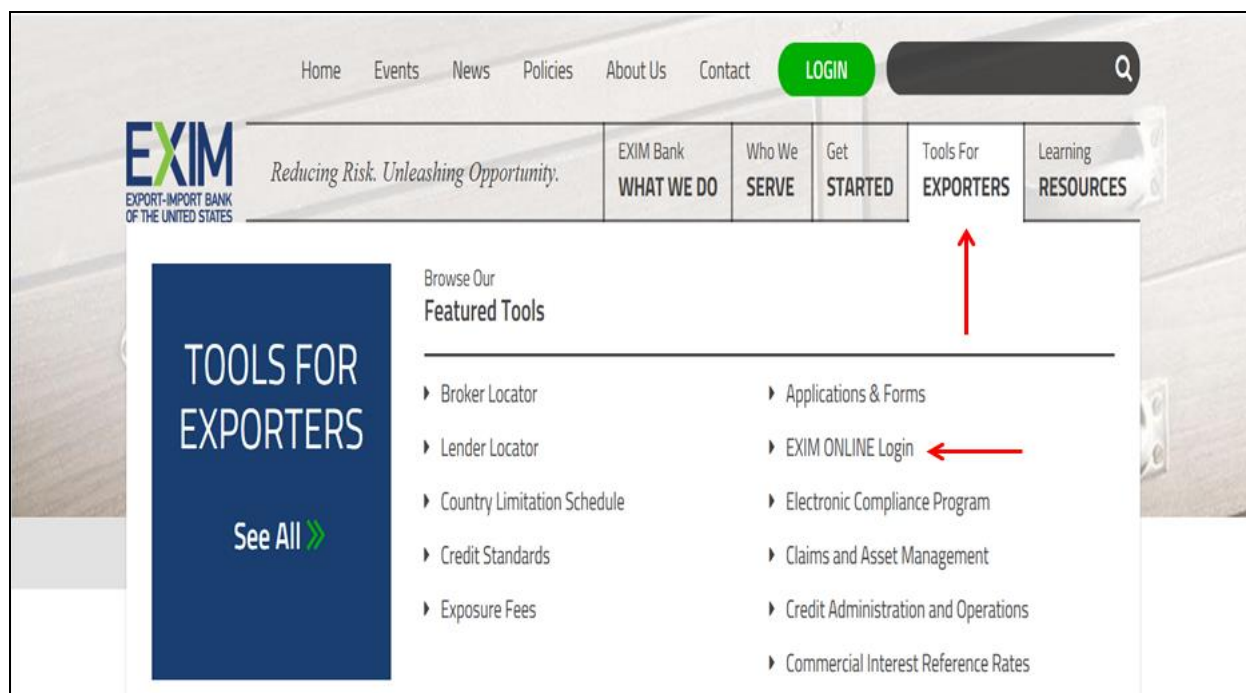
## Exim Online (EOL) Essentials: An Introductory Guide for Brokers

necessary. In both cases, the primary contact for the brokerage should email [BAPIMT@exim.gov](mailto: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?**

EOL is accessed via EXIM Bank's website [www.exim.gov](http://www.exim.gov) using the "Tools for Exporters" tab, or at <https://eximonline.exim.gov>.



### **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.

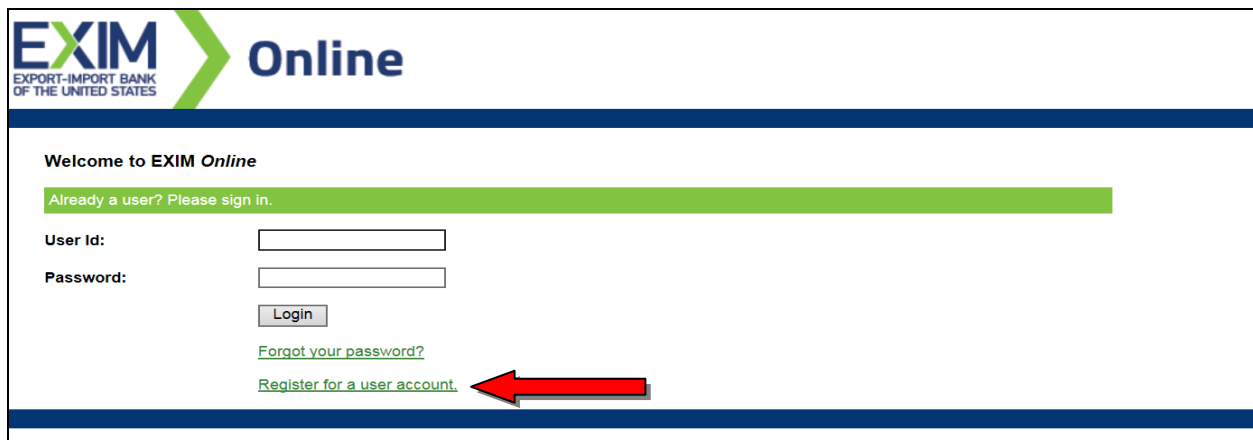
If the brokerage firm wants different offices to receive their own commissions directly from EXIM Bank, those offices must each separately complete the broker application and registration process. Each office will receive its own broker registration number, and the person registering for that office 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.



EXIM Online  
EXPORT-IMPORT BANK OF THE UNITED STATES

Welcome to EXIM Online

Already a user? Please sign in.

User Id:

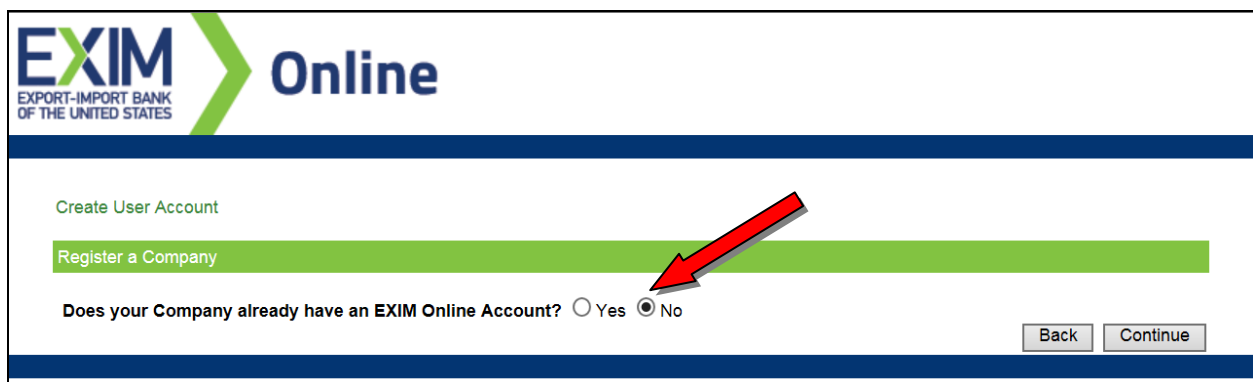
Password:

Login

[Forgot your password?](#)

[Register for a user account.](#)

2. If the customer is new to EOL, they should answer "No" to the question "Does your Company already have an EXIM Online Account"?



EXIM Online  
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Create User Account

Register a Company

Does your Company already have an EXIM Online Account?  Yes  No

Back Continue

3. The customer completes the details for their EOL profile and clicks “Continue”.

Create User Account

**Register a Company**

Please provide some additional details to set up the user account. Information collected here will only be used in our On-line Transaction Processing System. For more information about our data collection policies, [see EXIM Privacy Policy](#).

Asterisk(\*) denotes required information.

NAICS stands for North American Industry Classification System and is a 6-digit code that allows EXIM to easily understand your business. This is required for US companies. If you do not know your company's NAICS code, please use this [tool](#) (NOTE: this is an external link and is not related to or maintained by EXIM Bank) to identify the appropriate code.

A D&B DUNS Number will be required for application submission.

\*Country:

\*Company Name:  (The Legal name of the entity, not Tradestyle.)

\*Street Address:


\*City:

\*State/Province:

\*Zip / Postal Code:

DUNS Number:

Primary NAICS Code:



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.

OF THE UNITED STATES

Create User Account

**Enter User Information**

Provide some additional details to set up the user account. Please note that the information collected here will only be used in our On-line Transaction Processing System. For more information about our data collection policies, [see EXIM Privacy Policy](#).

Note: Asterisk(\*) denotes required information.

\*User ID:

User ID can only contain characters from the following four groups:

- o English uppercase characters (A through Z)
- o English lowercase characters (a through z)
- o Numerals (0 through 9)
- o Non-alphabetic characters: hyphen (-), period (.) and underscore (\_)

\*Password:

\*Re-enter Password:

Password should conform to the below guidelines:

- Must be at least 8 characters long.
- Must contain at least 1 character from each of the following four character groups:
  - o English uppercase characters (A through Z)
  - o English lowercase characters (a through z)
  - o Numerals (0 through 9)
  - o Non-alphabetic characters (such as ~, !, @, #, \$, %, ^, &, \*, (, ), ~, \_ , +, =, {, }, [ , ] , ; , < , > , / , ?)
- Must not contain spaces.
- Must not be the same as the User ID.

\*First Name:

\*Last Name:

\*Title:

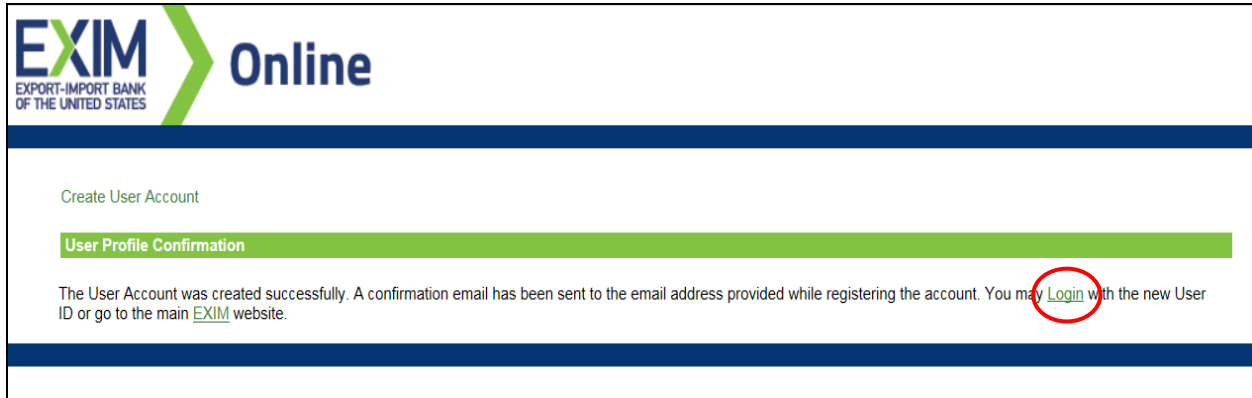
\*Phone:

\*Email:

\*Challenge Question:

Please select a "challenge" question and response and we'll use this to verify your identity when you call in to EXIM offices for your password.

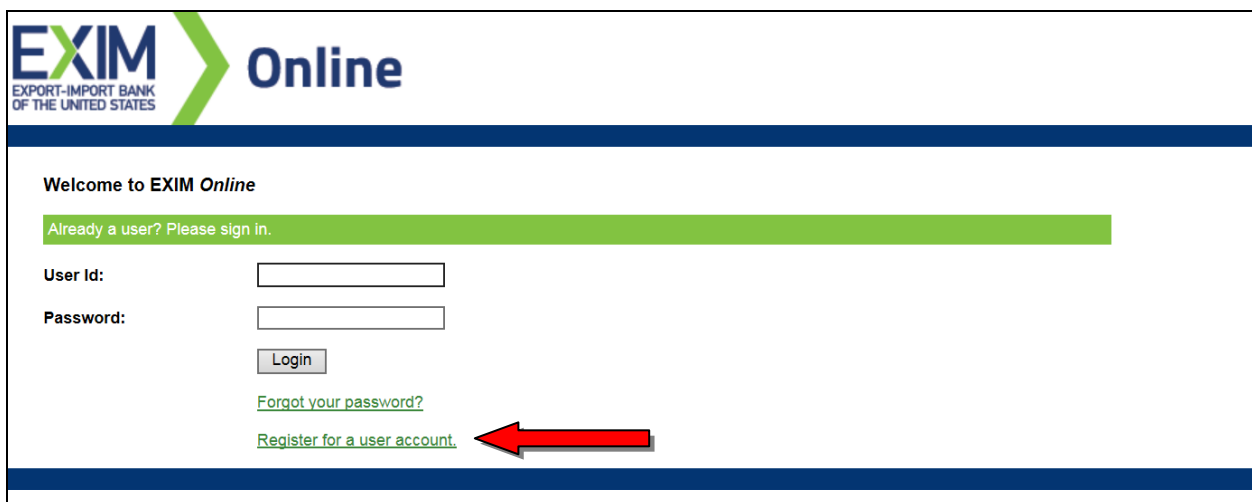
5. The customer will then receive a confirmation indicating that the user account was created and that a confirmation email has been sent. Remind the customer to record their User ID and password in a safe location. The customer may then proceed to log in to the new account.



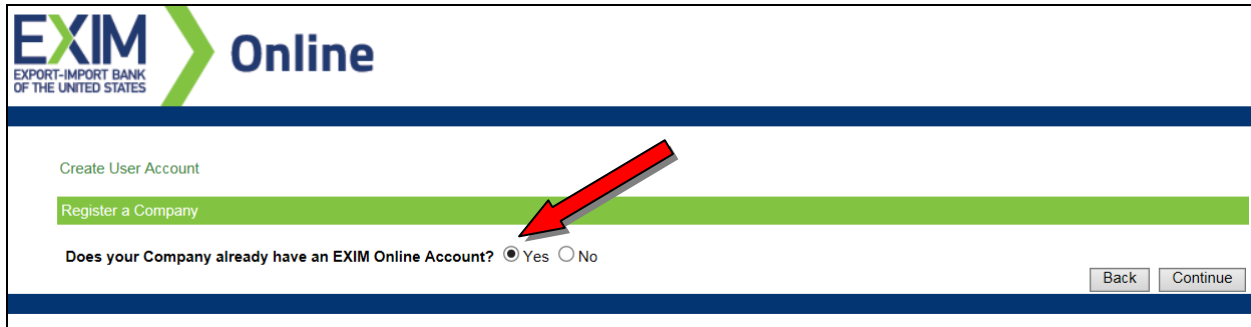
## Creating additional customer user accounts

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”?



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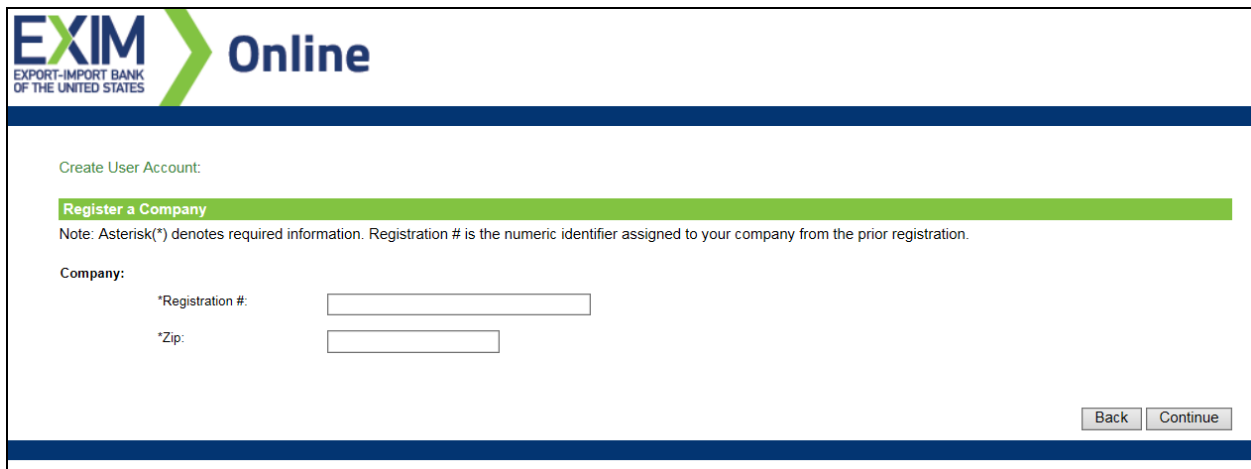
Create User Account

Register a Company

Does your Company already have an EXIM Online Account?  Yes  No

Back Continue

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



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Create User Account:

Register a Company

Note: Asterisk(\*) denotes required information. Registration # is the numeric identifier assigned to your company from the prior registration.

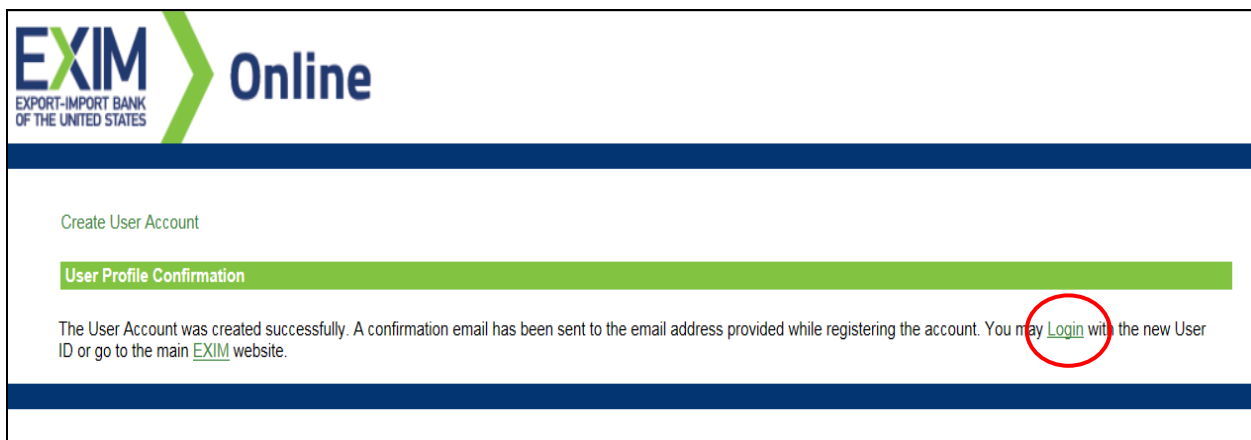
Company:

\*Registration #:

\*Zip:

Back Continue

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.



EXIM Online  
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Create User Account

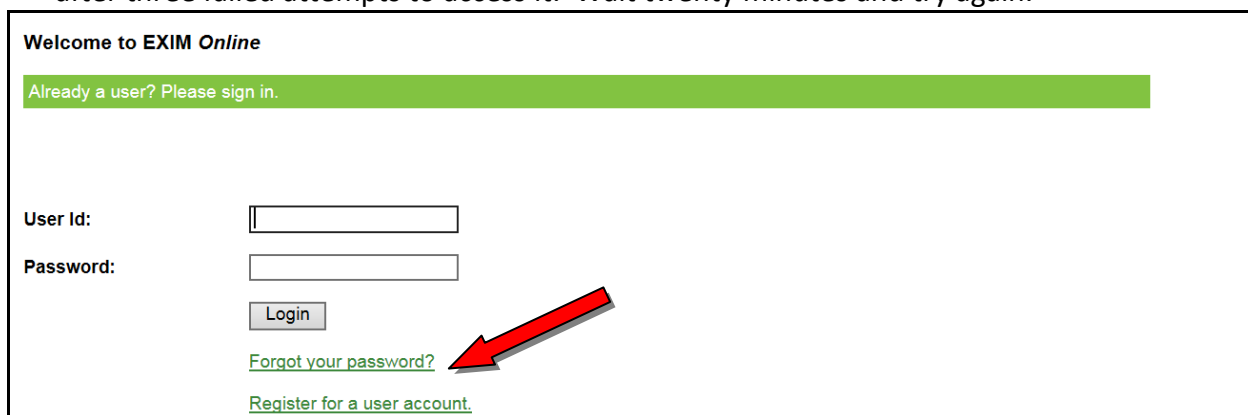
User Profile Confirmation

The User Account was created successfully. A confirmation email has been sent to the email address provided while registering the account. You may [Login](#) with the new User ID or go to the main [EXIM](#) website.

Back Continue

## 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?](#)

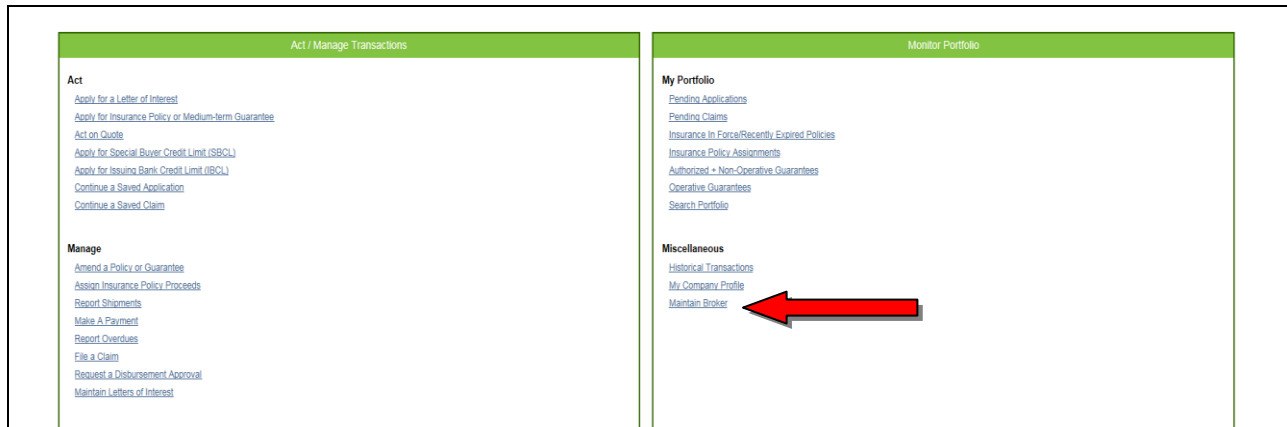
[Register for a user account.](#)

## Appointing a broker to the customer's account

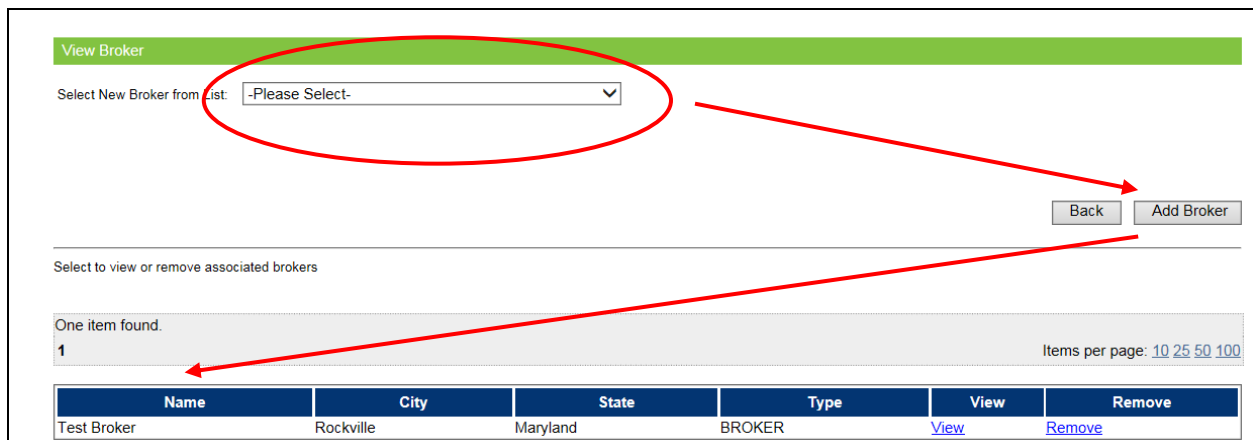
Before you can have access to your customer's account, the customer must appoint you as their broker to their account. This can be done in two ways. The first way is for the customer to make a general appointment of your company as discussed below in this section. The second way is for the customer to 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".

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The screenshot shows the EXIM Online dashboard. At the top right, there are links for 'Home' and 'Customer Service'. Below this, the 'Test Company' information is displayed, including the business address (106 Garcia Ln, Rockville, MD 20850-4741) and primary contact (Lauren Kirsch, exo\_deadletter@exim.gov). The main content area is divided into two columns: 'Act / Manage Transactions' and 'Monitor Portfolio'. Under 'Act / Manage Transactions', there are two sections: 'Act' and 'Manage'. The 'Act' section contains several links, with a red arrow pointing to 'Apply for Insurance Policy or Medium-Term Guarantee'. The 'Manage' section contains links for policy and guarantee management. The 'Monitor Portfolio' section contains links for 'My Portfolio' (Pending Applications, Pending Claims, Insurance in Force/Recently Expired Policies, Insurance Policy Assignments, Authorized - Non-Operative Guarantees, Operative Guarantees, Search Portfolio) and 'Miscellaneous' (Historical Transactions, My Company Profile, Maintain Broker).

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.

The screenshot shows the 'New Application' page. At the top, there is a header with the EXIM Online logo and user information (Logged in as: test\_exporter | My Profile | Change Password | Last logged on at 4:59 PM EDT on Apr 1). Below the header, there is a 'UAT Environment' notification. The main content area is titled 'New Application' and contains instructions: 'Please select the type of product you wish to apply for and click Continue. The Customer Service tab above has links to additional information that can help you fill out the on-line application forms. Please review these pages, if necessary.' Below this, there is a section for 'Application Type:' with a dropdown menu. The dropdown menu is open, showing options: 'Selected', 'Letter of Credit Insurance', 'Exporter Single-Buyer Insurance', 'Financial Institution Buyer Credit Insurance', 'Short-Term Multi-Buyer Insurance', and 'Medium Term Insurance or Guarantee'. A red arrow points to the 'Short-Term Multi-Buyer Insurance' option. At the bottom right, there are 'Back' and 'Continue' buttons.

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”.

The screenshot shows the 'Multi-Buyer Application Selection' page. At the top, there is a green header with the text 'Multi-Buyer Application Selection'. Below this, there is a paragraph: 'If you need assistance with this application, please contact EXIM Bank (1-800-565-3946) or your insurance broker.' The page is divided into two columns: 'EXPRESS INSURANCE POLICY' and 'OTHER MULTI-BUYER INSURANCE POLICIES'. Each column has a 'Fact Sheet' link. The 'EXPRESS INSURANCE POLICY' section lists several criteria: 'if you have ten (10) or fewer foreign buyers; and', 'prefer EXIM Bank to approve all required buyer credit limits and assist you to obtain buyer credit information; and', 'you are a "small business" by SBA standards; and', 'with your affiliates, you averaged \$7,500,000 or less in annual export credit sales over the last three (3) years'. A note below this list states: '(\$7,500,000 annual average excludes sales to Canada and those on letter of credit or sight payment terms)'. The 'OTHER MULTI-BUYER INSURANCE POLICIES' section lists: 'if you have any number of foreign buyers; and', 'prefer to self-approve some or most buyer credit limits; and', 'you are a small, medium or large business'. At the bottom, there are two buttons: 'Start Express Application' and 'Start Other Multi-Buyer Application'. A red arrow points to the 'Start Express Application' button.

## Exim Online (EOL) Essentials: An Introductory Guide for Brokers

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

Express Insurance Application  
Application Instructions | Application Summary  
OMB No. 3048-0031, EEB 10-02, ExpIns 06/30/2019

Tracking #: 660901

Home Customer Service

Exporter: Test Company

Introduction

To complete this application you will need you:

- 1) Most recent fiscal year financial statements.
- 2) Total export credit sales and write-offs for the last three years.
- 3) Accounts receivable aging, dated within 30 days of the application date.
- 4) Complete name(s) and address(es) of buyer(s) for which credit indications are requested with this application.

\*\*\* Important \*\*\* - The Buyer and End User must be foreign entities in countries for which EXIM is able to provide support, see EXIM's [Country Limitation Schedule](#).

A Preview of the application process is available in this [video](#). Please use the **Right Navigation Area** to easily move to specific sections of this application. Just point and click on the section you wish to access. When each section is marked with a “v” you may **Submit** the application for processing.

At any time during the application process, you may click on the “**Save and Exit**” button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application for your records by clicking on the “**Application Summary**” link at the top of the page.

**Decisions:** Upon submission, a tracking number will be provided allowing you to track the application's progress.

For **Help**, contact your insurance broker -or- call 1-800-555-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

Done App. Section  
Company Info  
General Questions  
Products  
Affiliates  
Export Credit Experience  
Financial Highlights  
Buyer Credit Request(s)  
Attachments & Comments  
Submit

- 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.

**Application Primary Contact:** The individual responsible for all correspondence specifically related to this transaction. You can choose from the existing contacts already on file (if any) OR add a new contact by picking the "Add New Contact" option.

Contacts on file:

Mr. John Smith - (123) 456-7890

\*Prefix

Mr.  Mrs.  Ms.

\*First /Last Name:

John / Smith

\*Title:

President

\*Email:

john.smith@littlebrother.com

\*Phone / Fax (optional):

(123) 456-7890 /

**Broker:** Please select a broker if you are working with an insurance brokerage. Broker will have **full access rights (view and enter data)** to this application.

-Please select-

**Customer should not select either of these unless they want the organization to have access to its application. They may want to use this option if they assign policy proceeds to a financial institution.**

**Financial Institution:** Please select a Financial Institution (view access only)

-Please Select-

**City/State:** Please select an EXIM Bank export promotion City/State Partner (view access only)

-Please Select-

Save & Exit

Continue

**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.

**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.

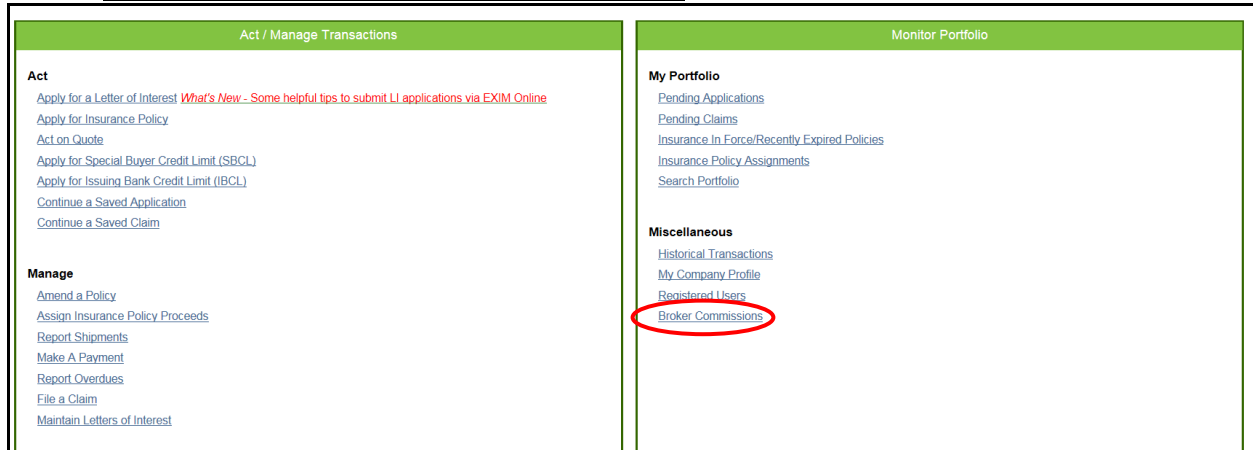
**Customer landing page**

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.

## 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:

- The customer's landing page has a "Maintain Broker" link under "Miscellaneous"
- The customer's landing page has some additional links that are for EXIM Bank guarantees, which are not brokered
- 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.

- From the landing page, the customer clicks "Amend a Policy or Guarantee".



2. The customer selects the policy they want to amend.

Home Customer Service

Test Company A Business Address: 7019 Tilden Ln, Rockville, MD 20852-4548 Primary Contact: Evelyn Solano-martinez, exo\_deadletter@exim.gov

In Force Policies/Guarantees

One item found. 1 Items per page: 10 25 50 100

Num	Type	Insured/Guaranteed Lender	Buyer/Borrower Country	Country	Credit Limit
664094	ENB	Test Company A			100,000.00

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

Home Customer Service

Insured: Test Company A Policy Amendment Application Case #: 664430

Amend Policy Application Sections

Amend Policy for Policy # 664094 :ENB

Insured: Test Company A

Point and click in the right navigation bar to access your requested amendment. At least one update to a section is required in order to submit the amendment application request. For Deductibles and Premium Rate Amendment requests, contact your Relationship Manager.

At any time during the application process, you may click on the "Save and Exit" button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to Attach or Upload copies of credit information you wish to include in your application as well as Print a copy of the application summary for your records.

Decisions: This system will issue you a status notification upon submission of your amendment application request

TO START: Click on "Continue" below

For Help, contact your insurance broker -or- call 1-800-565-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

Back Continue

- Done
- Application Sections
- Insured Name
- Insured Address
- Primary Contact
- Broker
- ExpirationDate
- Policy Payment Limit
- Deductible
- Cancel or Withdraw SBC/IBCL
- DCL
- Advance Deposit
- Rate
- Products
- Exclusions
- Special Coverages
- Affiliates
- Other
- Attachments
- Comments
- Application Summary
- Submit

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”.

Insured: Test Company A Policy Amendment Application Case #: 664432

Change Broker Application Sections

Current Broker: Benecorp Inc.

Change Broker to:

None

Select from Brokers Associated with this Company

Select New Broker from List: [-Please Select-]

Note: Your former Broker will be informed of this request or change in broker.

Back Save and Exit Continue

- Done
- Application Sections
- Insured Name
- Insured Address
- Primary Contact
- Broker
- ExpirationDate
- Policy Payment Limit
- Deductible
- Cancel or Withdraw SBC/IBCL
- DCL
- Advance Deposit
- Rate
- Products
- Exclusions
- Special Coverages
- Affiliates
- Other
- Attachments
- Comments
- Application Summary
- Submit

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

The screenshot shows a web interface for a 'Policy Amendment Application'. At the top right is a 'Home' button. The main header area includes 'Insured: Test Company B', 'Policy Amendment Application', and 'Case #: 664535'. Below this is a green bar with the text 'Submit'. The main content area contains instructions: 'To submit the policy amendment requests, click the 'Submit' button below.' and 'To save the amendment requests, and submit later, click the 'Save and Exit' button below.' At the bottom right, there are three buttons: 'Back', 'Save and Exit', and 'Submit'. A red arrow points to the 'Submit' button.

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

The screenshot shows a confirmation page titled 'Submit – Tracking Sheet'. At the top right is a 'Home' button. The main header area includes 'Insured: Test Company A', 'Policy Amendment Application', and 'Case #: 664432'. Below this is a green bar with the text 'Submit – Tracking Sheet'. The main content area contains the text: 'This is your tracking sheet. Print this page and include a copy with any documentation that you send to EXIM Bank regarding this application.' Below this is a section with application details: 'Tracking #: 664432', 'Application Submittal Date: 09/07/2017', 'Applicant legal name: Test Company A', 'Applicant address: 123 Straight Street', 'Applicant city/state/zipcode: Anywhere MD 20852-4548', 'Applicant country: UNITED STATES', 'Applicant contact name: Evelyn Solano-martinez', 'Applicant contact title: OWNER', and contact information for the Export-Import Bank of the United States. At the bottom right, there is a 'Print' button.

## 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.



# Exim Online (EOL) Essentials: An Introductory Guide for Brokers

EXIM Online  
EXPORT-IMPORT BANK OF THE UNITED STATES  
Build Version: EXO4.5.0 v1  
Deployed Jan 19, 2017

UAT Environment - EXO-6.7.0

Logged in as: testbroker | My Profile | Change Password | Logout  
Last logged on at 12:02 PM EDT on Apr 26, 2017

Home Customer Service

**Online Services Help**  
Please use the below selections to learn about the various EXIM Online services available.

- Registration and Account Maintenance
- Application Submission
  - Short-Term Multi-Buyer Insurance (Standard)
  - Short-Term Multi-Buyer Insurance (Express)
  - Special Buyer Credit Limits
  - Issuing Bank Credit Limits
  - Letter of Credit Insurance
  - Exporter Single-Buyer Insurance
  - Financial Institution Buyer Credit Insurance
  - Medium Term Insurance
  - Medium Term Guarantee
- Manage Policy/Guarantee
- Shipment & Overdue Reporting

**Contact Us**

- Provide your Feedback
- EXIM Directory

**FAQs**

- User Account
- Application Submission
- Shipment Reporting
  - How can I access my policy so that I can enter shipment report?
  - I tried to add a Buyer in shipment reporting but for some reason the system is not retaining the record?
  - I am trying to add a shipment report but I am getting this error message "Shipment Premium Rate does not exist for the transaction type and payment term you have selected". What should I do?
  - How come the shipment report is not picking up the correct premium rate on my Medium Term policy?

Ex-Im Online  
Assisting Export Financing  
UAT Edition  
Build Version: EXO4.5.0 v1  
Deployed Jan 19, 2017

Logged in as: testbroker | My Profile | Change Password | Logout  
Last logged on at 12:24 PM EDT on Apr 14, 2017

Home Customer Service

**Online Services Help**  
Please use the below selections to learn about the various Ex-Im Online services available.

- Registration and Account Maintenance
- Application Submission
- Manage Policy/Guarantee
  - Overview
  - Search Portfolio
  - Continue Saved Applications
  - Check Status of Submitted Applications
  - Act on a Quote
  - Amend Policy or Guarantee
  - Review Active Policies
  - Review Authorized Guarantees
  - Assign Policy Proceeds
  - Review Historical Transactions
- Shipment & Overdue Reporting
- Claims
- Broker Functions
- Lender Disbursement Requests

**Manage Policy or Guarantee**

Portfolio Management >> Overview

Through application submission to document issuance and followed by maintaining your policy or guarantee, the Exim Online System provides the ability for you to submit amendment application, check the status of submitted transactions, view policy documentation as well as view policy or guarantee parameters at any point in time. The following sections describe the different links located on the Exim Online home page and what information is available within each of these areas.

**Search Portfolio**

The "Search Portfolio" link located on the right hand side of the page under the "My Portfolio" section provides the ability for you to easily access a particular transaction, view a selected shipment or view all payment activity for a selected policy. By selecting a category and a status within that category, the System will retrieve all results that match the criteria. In addition, you can further narrow the results displayed by adding filter criteria to the initial results displayed. For example, if you select "Shipments" and the status "Accepted", the System will display all accepted shipments for all policies associated to you as an Insured or for a Broker, all accepted shipments for every policy for which they are the designated broker. To further narrow the results, you can apply a filter to pick a particular policy by number, or enter a buyer name to view all accepted shipments by buyer and more. The filtering process allows greater flexibility in narrowing results to help you get to the information that you need in an efficient manner.

**Continue Saved Applications**

The "Continue Saved Applications" link located on the left hand side of the page under the "Act" section will retrieve a listing of all applications that have been started but not yet submitted. This section will display both new and amendment applications. In addition, you can remove saved but not submitted applications by clicking on the "Remove" link which is located to the right of every saved application. These application will remain under this section for up to 90 days at which point if not submitted, the application will fall off the list and be marked as a canceled application.

**Check Status of Submitted Applications**

The "Pending Applications" link located on the right hand side of the page under the "My Portfolio" section will display all applications