



**EXPORT-IMPORT BANK**  
*of the* **UNITED STATES**

# Getting Started with Ex-Im *Online*

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A Guide for Brokers

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## Welcome to Ex-Im *Online*!

This document will help you to get started using our new online system. Common tasks will be explained step-by-step, including registering new exporters, applying for insurance and guarantee products, and managing your Ex-Im Bank transactions.

Ex-Im *Online* has been designed with the broker in mind, allowing you to:

- view and manage all of your policies online;
- submit and track new policy and buyer approval applications;
- view and accept policy quotations;
- view and print policy documents;
- submit shipment reports;

*all in one place, available anytime, anywhere.*

### So how do I get started?

Due to unique broker Ex-Im Online access rights, all active Ex-Im Bank approved brokers will be pre-registered in Ex-Im *Online* and provided with a temporary username and password. Please contact the Director of Broker Relations, Judith Rivera, with questions: 202-565-3417 or [Judith.Rivera@exim.gov](mailto:Judith.Rivera@exim.gov)

From the main ExIm website, click "Apply Online" in the Quick Links section, or type <https://eximonline.exim.gov> in your web browser.

### How do my customers get started?

For new customers you will need to assist them in registering and naming you as their broker. This will enable you to view and complete new applications on the exporter's behalf, and view/manage in-force policies, all from your personal account in Ex-Im *Online*.

This process has three parts, detailed in the following sections.

Step 1 – Create the exporter's user account in Ex-Im *Online*

Step 2 – Name your company as broker

Step 3 – Grant broker access rights when submitting a new policy application

We strongly encourage you to walk through these steps with your customer to insure proper access to their applications and policies in Ex-Im *Online*.

## Navigating in Ex-Im *Online*

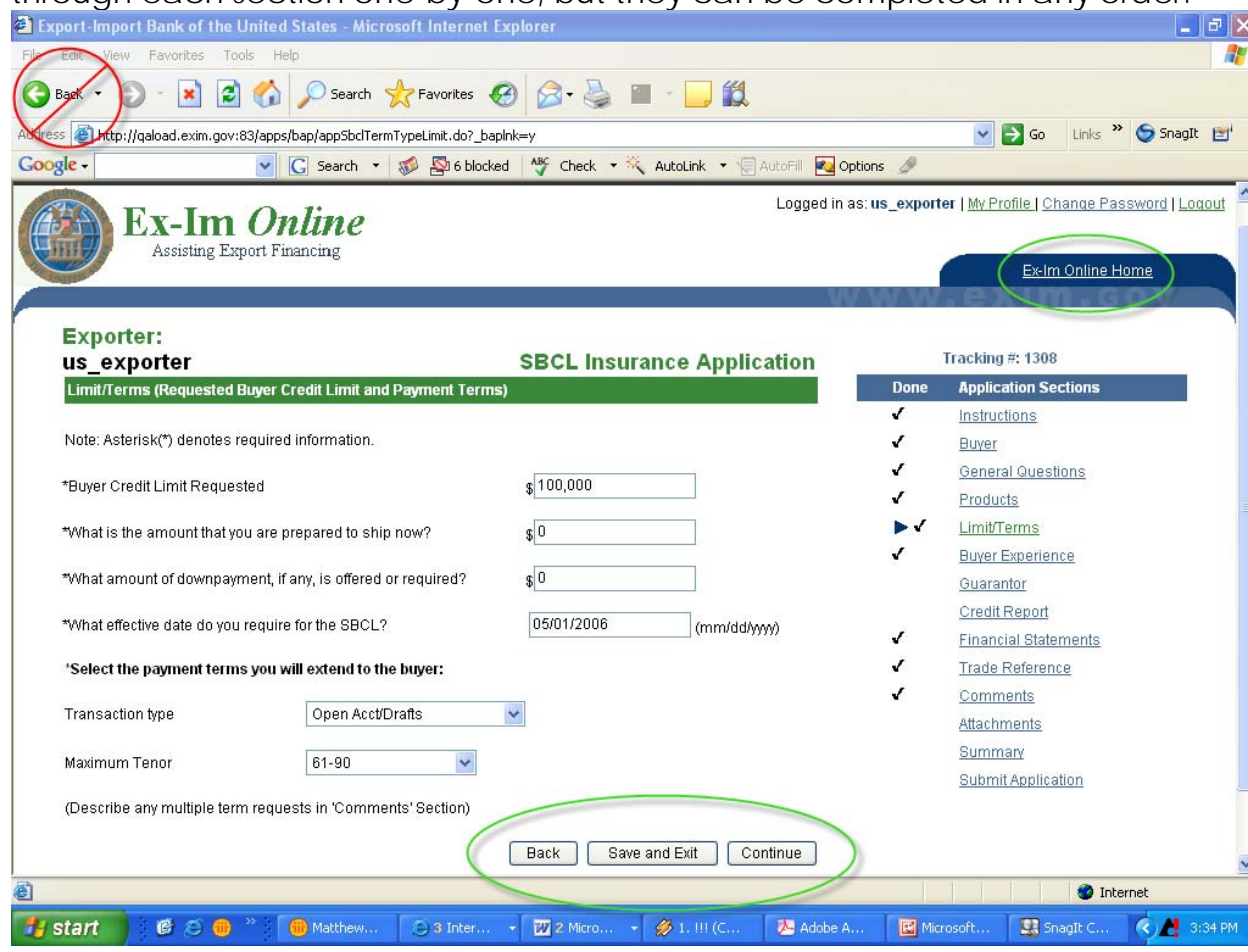
Before we begin, here are a few general comments on navigating your way through the system.

**It all starts with the Landing Page.** The “Ex-Im Online Home” link at the top right corner of each page returns you to the Landing Page, the starting point for all your activities in Ex-Im *Online*.

**Don’t use the “Back” button in your browser.** Ex-Im *Online* dynamically creates each page, and navigation buttons are provided at the bottom of each page.

**Save and Exit without losing information.** Once completed a check mark appears next to that section. At any point, just click “Save and Exit”. All information in completed sections is retained, and you can pick up where you left off by choosing “Continue a Saved Application” from the Landing Page. Saved but not submitted applications will be removed from Ex-Im Online after 90 days.

**Complete applications in any order.** Applications are divided into sections (right) and can be completed in any order. Clicking “Continue” will take you through each section one-by-one, but they can be completed in any order.



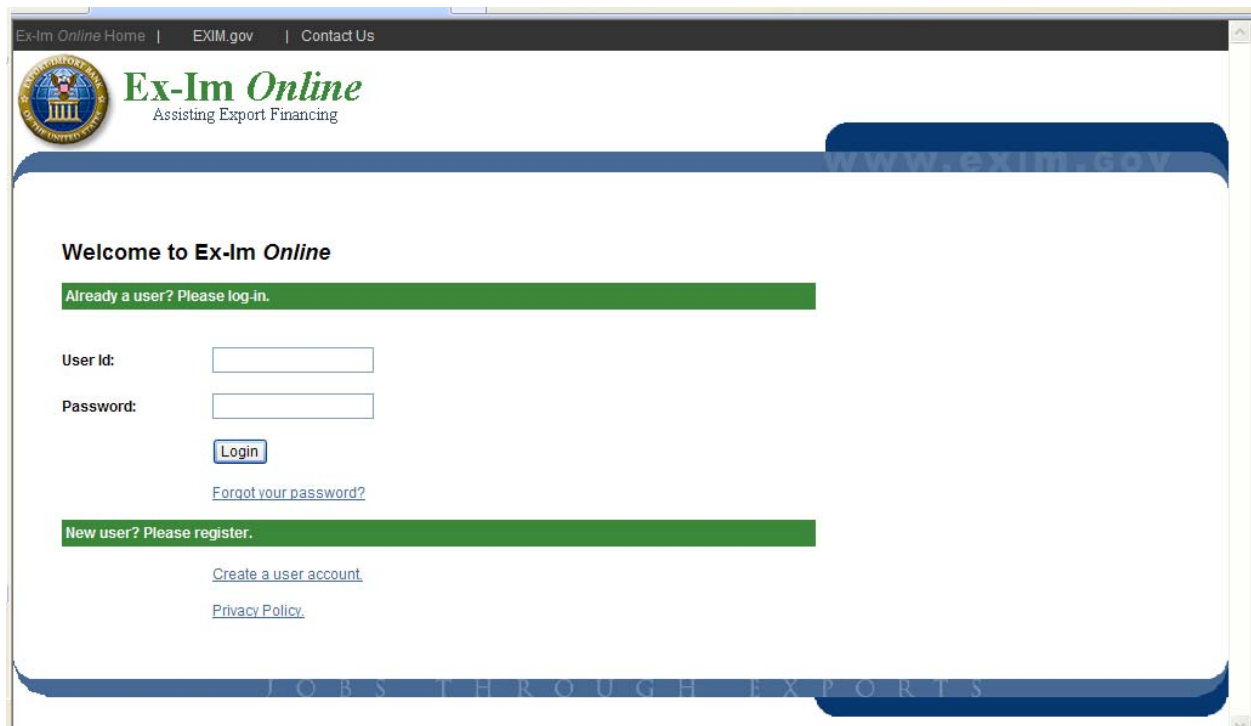
## Registering New Users in Ex-Im *Online*

Two different protocols exist for establishing user accounts in Ex-Im Online. The pathway you should choose depends on whether or not your client is brand new to Ex-Im Online.

### ***New To Ex-Im Online User Accounts***

If you are sure no one else at your client's company has established/registered the company with Ex-Im *Online*, follow the following steps:


1. Click on the "Create user account" link off the Ex-Im *Online* landing page



## Getting Started in Ex-Im *Online*

2. Answer "no" to the question "Is the Company Already Registered with Ex-Im *Online*?"

Ex-Im Online Home | EXIM.gov | Contact Us

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### Create User Account

**External User**


Register a Company

Is the Company Already Registered with Ex-Im Online?  Yes  No

Back Continue

3. Complete the company information as required

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### Create User Account

**External User**

Register a Company

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 [Ex-Im Privacy Policy](#).

Note: Asterisk(\*) denotes required information.

**Company:**

\*Country: UNITED STATES

\*Company Name: Paper Clips of America (Please enter the legal entity/name, not tradestyle.)

\*Street Address 1: 123 Main Street

Street Address 2: Suite 456

\*City: Johnson City

\*State: New York

\*Zip / Postal Code: 13790

Duns Number: 111111118

Note: Duns Number will be required for application submission.

Back Continue

When entering a new company, it is necessary to include their Duns number.

4. Create a user ID and password, and provide your individual information. Please take extra care to remember your password and your challenge question information.

collection policies, [see EX-311 PRIVACY POLICY](#).

Note: Asterisk(\*) denotes required information.

\*User Id:  (Choose your own user id)  
-A valid User Id may contain Alphanumerics(A-Z,a-z,0-9), Hyphen(-), Period(.), Underscore(\_)

\*Password:  Password must:  
-be at least 8 characters, at the most 50 characters, and not be the same as the User Id  
-be alphanumeric, contain both upper case and lower case characters, and contain at least one special character

\*Re-enter Password:

\*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 Ex-Im offices for your password.)

\*Challenge Response:

5. Wait until you see a message that the account was successfully created, as below. When you receive this message, you can now login to the system.

Ex-Im Online Home | EXIM.gov | Contact Us



**Ex-Im Online**  
Assisting Export Financing

[www.exim.gov](http://www.exim.gov)

### Create User Account

**External User**

**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 [Ex-Im](#) website.

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## ***Existing Ex-Im Online Participant User Accounts***

If anyone at your client's company has ever logged into Ex-Im *Online* and/or submitted an application, their company information is in Ex-Im *Online*. Additional user accounts can be created so multiple members of your client's company can access the company's transaction information. To create additional accounts for your client, you will need to enter your client's Participant ID# and zip code. If you do not have this information, please have your client contact Exim Bank to establish the account. Please contact Credit Applications & Processing Division 202-565-3800.

If you have this information, the steps to establish the account are as follows.

1. Select "Create a user account"

Ex-Im Online Home | EXIM.gov | Contact Us

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Assisting Export Financing

www.exim.gov

**Welcome to Ex-Im Online**

**Already a user? Please log-in.**

User Id:

Password:

[Forgot your password?](#)

**New user? Please register.**

[Create a user account](#)


[Privacy Policy](#)

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2. Check the button to indicate your client's company is already registered.

Ex-Im Online Home | EXIM.gov | Contact Us

 **Ex-Im Online**  
Assisting Export Financing

www.exim.gov

**Create User Account:**

**External User**

**Register a Company**


Is the Company Already Registered with Ex-Im Online?  Yes  No

Back Continue

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3. Enter the company's participant ID # and Zip code

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 **Ex-Im Online**  
Assisting Export Financing

www.exim.gov

**Create User Account:**

**External User**

**Register a Company**

Note: Asterisk(\*) denotes required information.

**Company:**

\*Participant #:


\*Zip:

Back Continue

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4. Select a username and password, enter in the user information, and click "continue".

Ex-Im *Online* Home | EXIM.gov | Contact Us



www.exim.gov

### Create User Account: External User

**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 [Ex-Im Privacy Policy](#).

Note: Asterisk(\*) denotes required information.

\*User Id:  (choose your own user id)

\*Password:  Password must:  
- be at least 8 characters, and not be the same as the User Id  
- be alphanumeric, contain both upper case and lower case characters, and contain at least one special character

\*Re-enter Password:

\*First Name:

\*Last Name:

\*Title:

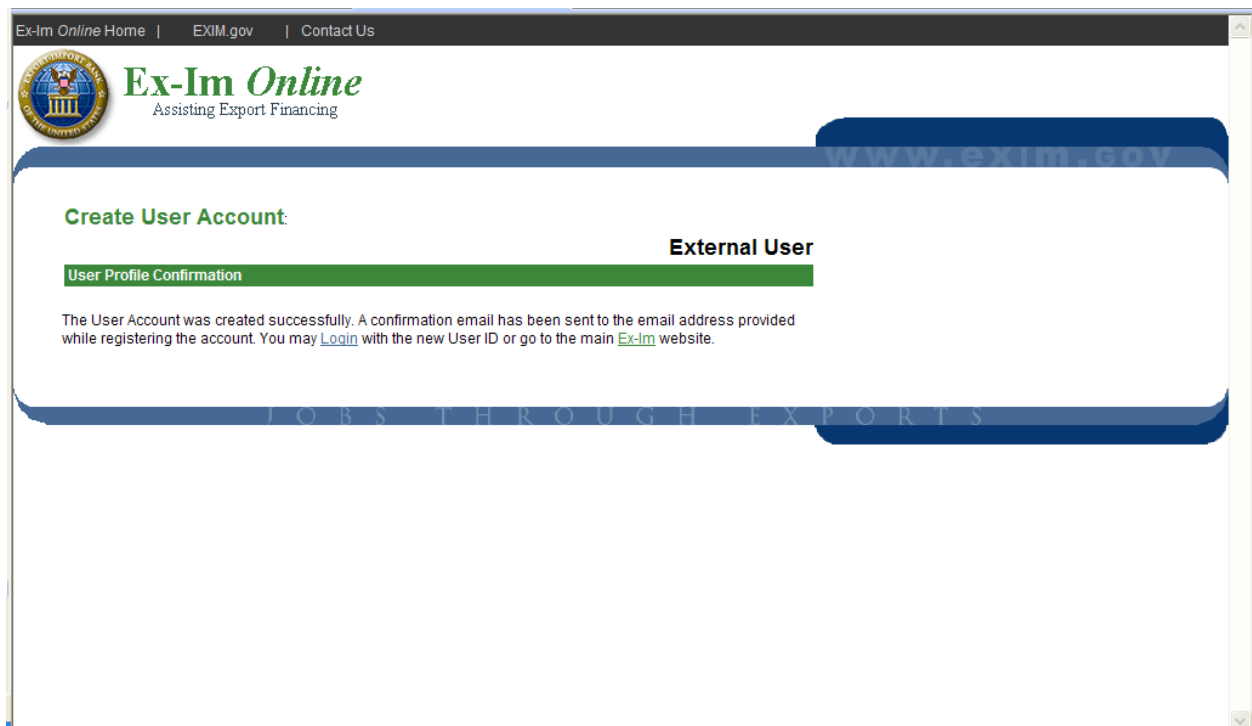
\*Phone:

\*Email:

\*Challenge Question:  (Please select a "challenge" question and response and we'll use this to verify your identity when you call in to Ex-Im offices for your password.)

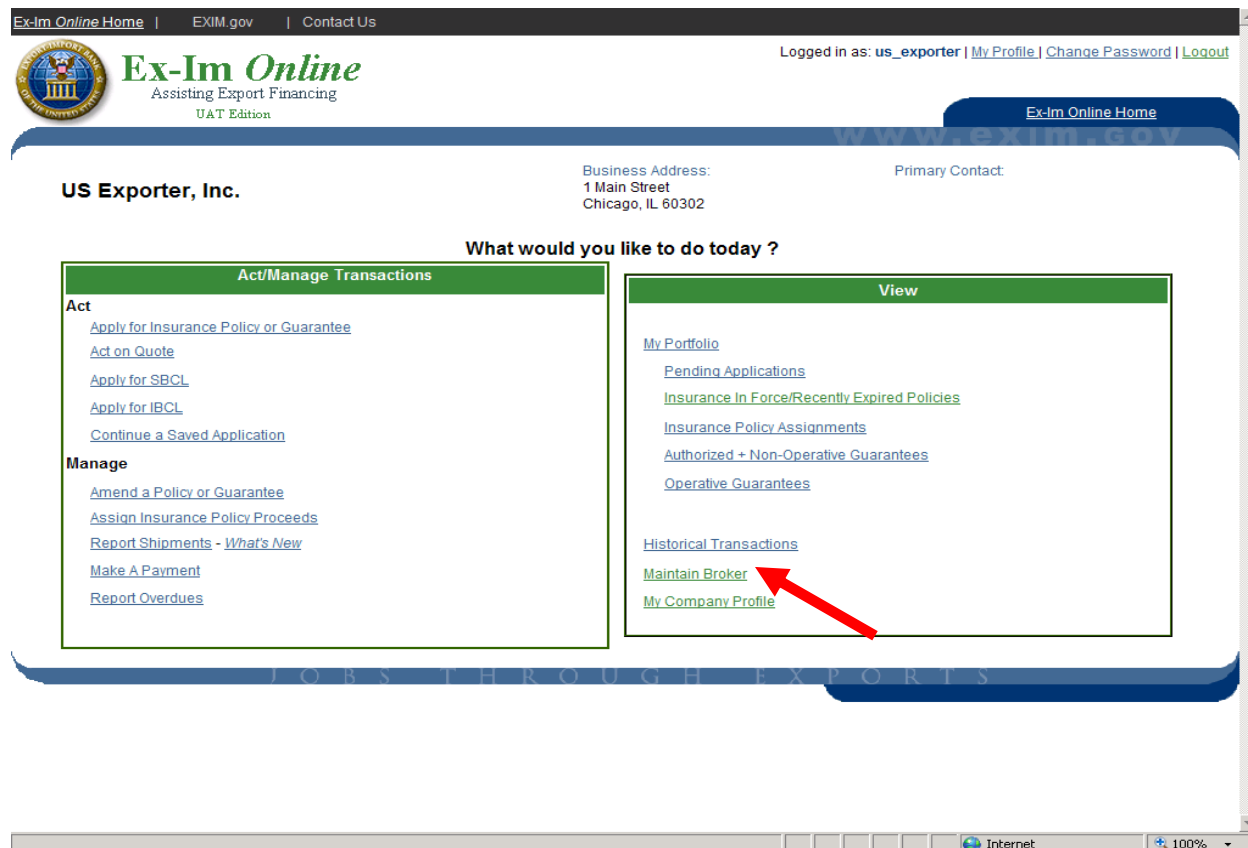
\*Challenge Response:

5. Wait until you see a message that the account was successfully created, as below. When you receive this message, your client can now login to the system with the new account.



## Exporter Landing Page

Pictured below is the “Exporter Landing Page”, and it is the first thing your customers will see upon entering Ex-Im *Online*.



## Naming a Broker

By clicking on the “Maintain Broker” link, the exporter associates you to their Ex-Im *Online* account, allowing you to start new policy applications on their behalf. We strongly encourage you to walk through this step with new customers to insure you are properly associated with their company.

The “My Company Profile” lists the company primary contact, the individual responsible for all general correspondence between Ex-Im Bank and the Company, and the policy primacy contacts, the individual responsible for transaction specific correspondence. All system generated e-mail notifications regarding a policy will be sent to the policy primary contact. A policy amendment is required to change or update a policy primary contact.

## Getting Started in Ex-Im Online

The drop down box shown below will list all registered Ex-Im Bank brokers. Instruct the exporter to select your brokerage firm from the list, and click the “Add Broker” button.

The screenshot displays the Ex-Im Online web application interface. At the top, there is a navigation bar with links for "Ex-Im Online Home", "EXIM.gov", and "Contact Us". The user is logged in as "us\_exporter" and has options for "My Profile", "Change Password", and "Logout". The main header features the Ex-Im Online logo and the text "Assisting Export Financing UAT Edition". Below the header, the user's profile information is shown, including the company name "US Exporter, Inc.", business address "1 Main Street, Chicago, IL 60302", and primary contact details. A green "View Broker" button is visible. Below this, there is a section for selecting a new broker, with a dropdown menu currently showing "One Broker". Two buttons, "Back" and "Add Broker", are located below the dropdown. A red arrow points to the "Add Broker" button. Below the buttons, there is a section for viewing or removing associated brokers, which currently displays "Nothing found to display." The browser's address bar and status bar are visible at the bottom of the screenshot.

## 2. Submit a New Insurance Policy Application

### *Select a new application*

From their [landing page](#), the exporter will select “Apply for Insurance Policy or Guarantee”. They will then choose from a list of current Ex-Im Bank product applications that are available in Ex-Im *Online*.

The screenshot displays the Ex-Im Online user interface. At the top, there is a navigation bar with links for 'Ex-Im Online Home', 'EXIM.gov', and 'Contact Us'. The user is logged in as 'us\_exporter' and has options to view their profile, change their password, or log out. The main header features the Ex-Im Online logo and the text 'Assisting Export Financing UAT Edition'. A blue banner at the top right says 'Ex-Im Online Home'. Below this, the user's profile information is shown: 'US Exporter, Inc.' with a business address in Chicago, IL, and a 'Primary Contact' field. A green bar labeled 'New Application' is visible. The 'Select Application Type' dropdown menu is open, showing options: 'Select One', 'Multi-buyer', 'Exporter short-term single buyer', 'Financial Institution short-term single buyer', 'Letter of Credit', and 'Medium term'. A note below the dropdown states: 'Note: If you are applying for a Medium term commitments or credit guarantee facilities you are required to submit a paper application which can be found on Ex-Im Bank's website under apply section.' At the bottom of the form are 'Back' and 'Continue' buttons. The browser's address bar shows 'Internet' and a zoom level of '100%'.

## Introduction and Application Instructions

The screenshot shows the Ex-Im Online application interface. At the top left is the Ex-Im Online logo with the tagline "Assisting Export Financing UAT Edition". The top right shows the user is logged in as "us\_exporter" with links for "My Profile", "Change Password", and "Logout". A navigation bar contains "Ex-Im Online Home" and "www.exim.gov".

The main content area is titled "Exporter: US Exporter, Inc." and "Multibuyer Insurance Application". A tracking number "441401" is displayed. A table of contents on the right lists application sections: Instructions (checked), Company Info, Access Rights, General Questions, Products, Export Portfolio, Affiliates, Export Credit Exp., Financial Statements, Decision Makers, Export Receivables, Aging Receivables, Exclusions, Special Coverages, Comments, Attachments, Application Summary, and Submit.

The "Introduction" section contains the following text:

**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 60 days of the application date

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

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 "✓" 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 **Send a fax** or **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application for your records.

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

**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 Ex-Im Bank Regional Office.

A "Continue" button is located at the bottom of the main content area.

Please encourage the exporter to read the instructions carefully for information on completing the application. Once an application is started the user can save and exit at any point without losing their information.

Note: Only the exporter can start a new insurance policy application, but once initiated it can be viewed and completed on their behalf by the broker. All saved applications can be viewed by the broker by clicking "Continue a Saved Application" on the broker landing page.

## Granting Access Right to Brokers, Lenders & City/State Partners

The screenshot shows the 'Multibuyer Insurance Application' page for 'US Exporter, Inc.' with tracking number 441401. The page is titled 'Access Rights to your Application'. It contains instructions and three sections for selecting entities: 'Broker used', 'Financial Inst. used', and 'City / State Partner used'. Each section has radio buttons for 'None', a dropdown for 'Select from [Entity] Associated with this Company', and a dropdown for 'Select New [Entity] from List'. A red arrow points to the 'Select from Brokers Associated with this Company' dropdown, which currently shows 'One Broker'. At the bottom, there are 'Back', 'Save and Exit', and 'Continue' buttons. The browser status bar at the bottom shows 'Internet' and '100%' zoom.

The final step in granting the broker access to this multibuyer application is by clicking the button next to “Select from Brokers Associated with this Company”, and choosing your brokerage from the list. Once complete, the application will be accessible from the broker landing page. You will be able to enter information on the exporter’s behalf, and submit the application for processing.



## Application Attachments & Application Certification

Ex-Im Bank requires that all application submissions include an application certification signed by the exporter. This certification along with all supporting credit information, such as credit reports and financial statements, can be attached to the application submission as pdf documents.

The screenshot displays the Ex-Im Online application interface. At the top, there is a navigation bar with links for 'Ex-Im Online Home', 'EXIM.gov', and 'Contact Us'. The user is logged in as 'us\_exporter' and has access to 'My Profile', 'Change Password', and 'Logout'. The main header identifies the user as 'US Exporter, Inc.' and the application as a 'Multibuyer Insurance Application' with a tracking number of 441401. The 'Attachments' section is highlighted in green and contains a text prompt: 'If there are any additional files (e.g., credit reports dated within the last six months or financial statements) that you feel would help in evaluating this application, they can be attached.' Below this prompt are fields for 'Add Another File:' with a 'Browse...' button and an 'Attach File' button. At the bottom of this section are 'Back', 'Save and Exit', and 'Continue' buttons. A red arrow points to the 'Continue' button. To the right, a table lists the application sections, each with a 'Done' checkbox and a link to the section. The sections listed are: Instructions, Company Info, Access Rights, General Questions, Products, Export Portfolio, Affiliates, Export Credit Exp., Financial Statements, Decision Makers, Export Receivables, Aging Receivables, Exclusions, Special Coverages, Comments, Attachments, Application Summary, and Submit. The 'Attach File' button and the 'Continue' button are highlighted with a red arrow.

Done	Application Section
✓	<a href="#">Instructions</a>
✓	<a href="#">Company Info</a>
✓	<a href="#">Access Rights</a>
✓	<a href="#">General Questions</a>
✓	<a href="#">Products</a>
✓	<a href="#">Export Portfolio</a>
✓	<a href="#">Affiliates</a>
✓	<a href="#">Export Credit Exp.</a>
✓	<a href="#">Financial Statements</a>
✓	<a href="#">Decision Makers</a>
✓	<a href="#">Export Receivables</a>
✓	<a href="#">Aging Receivables</a>
✓	<a href="#">Exclusions</a>
✓	<a href="#">Special Coverages</a>
✓	<a href="#">Comments</a>
▶ ✓	<a href="#">Attachments</a>
	<a href="#">Application Summary</a>
	<a href="#">Submit</a>

Ex-Im Online Home | EXIM.gov | Contact Us

Export-Import Bank of the United States  
**Ex-Im Online**  
Assisting Export Financing  
UAT Edition

Logged in as: [us\\_exporter](#) | [My Profile](#) | [Change Password](#) | [Logout](#)

Ex-Im Online Home

www.exim.gov

**Exporter:**  
**US Exporter, Inc.**

**Multibuyer Insurance Application**

Tracking #: 441401

**Submit Application**

To submit the application, please review, print and sign the [application certification](#) page, along with your company's most recent fiscal year end financial statements.

You can either attach the signed certification and financial statements to this application in PDF form, via fax to 202-565-3675, or by mail or delivery service to the address below:

Export Import Bank of the United States  
ATTN: Credit Applications & Processing  
811 Vermont Avenue, NW  
Washington, DC 20571  
Ex-Im Fax: 202-565-3675 or 202-565-3628.

Once you have completed review of the certification, please click "Submit" to complete the application process.

Done	Application Section
✓	<a href="#">Instructions</a>
✓	<a href="#">Company Info</a>
✓	<a href="#">Access Rights</a>
✓	<a href="#">General Questions</a>
✓	<a href="#">Products</a>
✓	<a href="#">Export Portfolio</a>
✓	<a href="#">Affiliates</a>
✓	<a href="#">Export Credit Exp.</a>
✓	<a href="#">Financial Statements</a>
✓	<a href="#">Decision Makers</a>
✓	<a href="#">Export Receivables</a>
✓	<a href="#">Aging Receivables</a>
✓	<a href="#">Exclusions</a>
✓	<a href="#">Special Coverages</a>
✓	<a href="#">Comments</a>
✓	<a href="#">Attachments</a>
	<a href="#">Application Summary</a>
▶	<a href="#">Submit</a>

JOBS THROUGH EXPORTS

Internet 100%

### 3. Application Status

#### *Email Confirmation & Tracking Numbers*

Every transaction submitted in Ex-Im *Online* (new application, submitted shipment report, amendment request) is assigned a unique tracking number that can be used to check the transaction's status at any time. Upon submission of a new application both exporter and broker will receive email notifications that also contain the tracking number.

The screenshot shows the Ex-Im Online interface. At the top, there is a navigation bar with links for 'Ex-Im Online Home', 'EXIM.gov', and 'Contact Us'. The user is logged in as 'us\_exporter' with links for 'My Profile', 'Change Password', and 'Logout'. The main header features the Ex-Im Online logo and the text 'Assisting Export Financing UAT Edition'. A blue banner at the top right says 'Ex-Im Online Home'.

The main content area is titled 'Exporter: US Exporter, Inc. Multibuyer Insurance Application' with a tracking number of 441401. A green button labeled 'Submit - Tracking Sheet' is visible. Below this, a message states: 'This is your tracking sheet. Print this page and include a copy with any documentation that you send to Ex-Im Bank regarding this application.' The tracking number '441401' is highlighted with a red arrow. Other details include the application submittal date (11/02/2009), applicant legal name (US Exporter, Inc.), address (1 Main Street, Chicago IL 60302), and contact information for Jean A. Fitzgibbon, Director.

At the bottom of the content area, there is a 'Print' button. The footer of the page contains the text 'EXPORTS THROUGH EXPORTS'.

The browser's status bar at the bottom shows 'Done', 'Internet', and '100%' zoom level.

## Viewing the Status of a Pending Application

Pictured below is the "Pending Applications" page, which displays a summary of all of your customers' transactions that are currently being processed by Ex-Im Bank. In the "#" column is the transaction tracking #, which links to more detailed status information (shown below). The "Application Summary" link provides a snapshot of all information entered in the application.

Ex-Im Online Home | EXIM.gov | Contact Us

Logged in as: jcool | [My Profile](#) | [Change Password](#) | [Logout](#)

**Ex-Im Online**  
Assisting Export Financing  
UAT Edition

Ex-Im Online Home

**One Broker**

Business Address:  
1 Eutaw St.  
Baltimore, MD 33124

Primary Contact:  
Alex Smith  
(255) 555-5555

**Pending Applications**

14 items found, displaying all items.

Items per page: [10](#) [25](#) [50](#) [100](#)

#	Type	Applicant	State	Buyer	Country	Payment Limit	Status	Date Sub <sup>+</sup>
<a href="#">441401</a>	MB-NEW	US Exporter, Inc.	IL			1,000,000.00	Pending, Exporter Underwriting	11/02/2009
<a href="#">441392</a>	MB-RENEWAL	Stone Inc	VA			500,000.00	Pending, Exporter Underwriting	10/30/2009
<a href="#">441315</a>	SBCL-NEW	Bridge Machine	NJ	Agroservicios del Noroeste, S.A. de C.V.	MEXICO	100,000.00	Pending, Exporter Underwriting	09/30/2009
<a href="#">441059</a>	MB-RENEWAL	Food Inc	VA			1,000,000.00	Pending, Exporter Underwriting	09/01/2009
<a href="#">441058</a>	MB-RENEWAL	Rock & Gravel Inc	NY			500,000.00	Pending, Exporter Underwriting	09/01/2009
<a href="#">440331</a>	SBCL-NEW	textile inc	MA	CA AA2	CANADA	101,000.00	Submitted	05/20/2009
<a href="#">440332</a>	IBCL-NEW	textile inc	MA			100,000.00	Pending, Exporter Underwriting	05/20/2009
<a href="#">440335</a>	IBCL-NEW	Rock & Gravel Inc	NY			100,000.00	Pending, Exporter Underwriting	05/20/2009
<a href="#">440321</a>	IBCL-NEW	Rock & Gravel Inc	NY			100,000.00	Pending, Exporter Underwriting	05/19/2009
<a href="#">440320</a>	SBCL-NEW	Rock & Gravel Inc	NY	mex122BB s buy	MEXICO	70,000.00	Pending, Exporter Underwriting	05/19/2009
<a href="#">440322</a>	MB-NEW	Bridge Machine	NJ			500,000.00	Submitted	05/19/2009
<a href="#">440323</a>	MB-NEW	Bridge Machine	NJ			500,000.00	Submitted	05/19/2009
<a href="#">440246</a>	SBCL-RENEWAL	textile inc	MA	ksouth s buy	KOREA, SOUTH	101,000.00	Pending, Exporter Underwriting	05/13/2009
<a href="#">439598</a>	IBCL-NEW	Food Inc	VA			100,000.00	Pending, Exporter Underwriting	02/09/2009

Ex-Im Online Home | EXIM.gov | Contact Us

Logged in as: jcool | [My Profile](#) | [Change Password](#) | [Logout](#)

**Ex-Im Online**  
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UAT Edition

Ex-Im Online Home

**US Exporter, Inc.**

Business Address:  
1 Main Street  
Chicago, IL 60302

Primary Contact:

**Application Status Information**

Policy Number: 441401  
 Company Name: US Exporter, Inc.  
 Application Type: MULTI-BUYER NEW  
 Policy Type: ENB  
 Date Submitted: 11/02/2009  
 Application Start Date: 11/02/2009  
 Assigned RM Group: Jean Fitzgibbon  
 Acquired by:  
 Being Routed to:  
 Application Status: Pending, Exporter Underwriting  
 Date Status Set: 11/02/2009  
 Timeout Date:  
 List of requested documents:

[Application Summary](#)  
[Application Status History](#)

[Back](#)

## 4. Quotation Acceptance

Once the application has been processed and approved by Ex-Im Bank, both the exporter and broker will receive email notification that a quotation has been issued and is ready to be viewed in Ex-Im *Online*. Both the exporter and broker can access the quotation by logging into the system and clicking on the “Act on Quote” link from the landing page.

Ex-Im Online Home | EXIM.gov | Contact Us

Ex-Im Online  
Assisting Export Financing  
UAT Edition

Logged in as: [us\\_exporter](#) | [My Profile](#) | [Change Password](#) | [Logout](#)

Ex-Im Online Home

US Exporter, Inc. Quote Case #: [441401]

Instructions

**Congratulations, your application has been approved!**

To view your quotation parameters, click on the "Continue" button.

You have 60 days to decide whether to accept the policy. Click "Exit" and return later if you need time to decide.

To Accept your policy, you must indicate a decision and specify the Policy Effective Date you prefer.

Exit Continue

Quote Section

- Instructions
- Parameters
- Indicate Decision
- Payment

Done Internet 100%

## Policy Parameters

Sample policy documents can be viewed and printed. To accept a quotation, the exporter will select the button next to the appropriate parameters and click "Continue". They will then be prompted to enter a policy effective date, and provided with options for paying the advance premium.

Tips: Once the policy has been accepted, the quote documents will be removed from the exporter/broker landing page under "Act on Quote" and will appear under "Insurance In-Force/Recently Expired Policies" once premium has been applied and the policy issued. Thus, the exporter/broker may want to print a copy of the quote documents during this lag time between quote acceptance and policy issuance.

Also, by paying premium due by either credit card or ACH, the policy documents will be generated much quicker, sometimes within hours of acceptance vs. payment by check which may delay policy issuance by a week. If paying by check please include the invoice screen with the check and include the policy # on the check.

click [here](#) to view the quote documentation

The following Parameters have been approved. Click the "View Document" link to view specimen documents, or click "Continue".

[Instructions](#)

Parameters

Indicate Decision

Payment

I want the ENB policy

**Parameters for an ENB Policy**

Percent of Coverage:	95%
Aggregate Limit:	\$1,000,000
Deductible:	\$0
Credit DCL:	\$20,000
Ledger DCL:	\$40,000
Premium Rate:	Rate Schedule (see Declarations)
Advance Premium:	\$500
Exclusions:	
Exclusion #1	SDDP/CAD (Sight Draft Documents Against Payment or Cash Against Documents)
Exclusion #2	UILC (Unconfirmed Irrevocable Letters Of Credit)
Special Coverages:	
Special Coverage #1	Warehouse
Special Coverage #2	Insure sales by Affiliates

---

I want the ESC policy

**Parameters for an ESC Policy**

Percent of Coverage:	95%
Aggregate Limit:	\$1,000,000
Deductible:	\$15,000
Credit DCL:	\$30,000
Ledger DCL:	\$60,000
Premium Rate:	0.47
Advance Premium:	\$500
Exclusions:	
Exclusion #1	UILC (Unconfirmed Irrevocable Letters Of Credit)
Exclusion #2	SDDP/CAD (Sight Draft Documents Against Payment or Cash Against Documents)
Special Coverages:	
Special Coverage #1	Warehouse
Special Coverage #2	Insure sales by Affiliates

Internet 100%

## 5. View In-Force Policy

Upon acceptance of the quotation and payment of the advance premium, the exporter's policy is issued in Ex-Im *Online*. Pictured below is the "Policy Landing Page", accessible from both the exporter and broker landing pages under the "Insurance In-Force/Recently Expired Policies" link.

The screenshot displays the 'Policy Landing Page' for 'US Exporter, Inc.' in the Ex-Im Online system. The page is organized into several sections:

- Company Information:**
  - US Exporter, Inc.** (Company Name)
  - Business Address:** 1 Main Street, Chicago, IL 60302
  - Company Contact:** (Link)
  - Policy Contact:** Jean A. Fitzgibbon, (202) 565-3620, jean.fitzgibbon@exim.gov
- Policy Details:**
  - Company:** US Exporter, Inc.
  - Policy Type:** ENB
  - Policy #:** 441401
  - Broker:** One Broker
  - Assignee:** (Link)
  - Policy Parameters:**
    - Policy Period: 10/01/2009 - 10/01/2010
    - Policy Payment Limit: \$1,000,000
    - Insured % of Coverage: 95%
    - Deductible: \$0
    - Credit DCL: \$20,000
    - Ledger DCL: \$40,000
    - Premium Rate: \$Per Rate Schedule
- Quick Links:**
  - [View Policy Documents](#)
  - [SBCL Application](#)
  - [IBCL Application](#)
  - [Cancel/Withdraw SBCL/IBCL](#)
  - [Report/View Shipments](#)
  - [Report/View Overdues](#)
  - [Amend Policy](#)
  - [Assign Policy](#)
  - [Policy History](#)
- Endorsements:**
  - 3 items found, displaying all items.
  - Items per page: [10](#) [25](#) [50](#) [100](#)
  - 1

Description	Endorsement #
ANI - Additional Named Insured	1
DCL - Discretionary Credit Limit	3
Warehouse	2
- In Force SBCLs & IBCLs:** Nothing found to display.
- Pending Applications:** Nothing found to display.
- Saved/Not Submitted Application:** Nothing found to display.

A 'Back' button is located below the policy details. The browser status bar at the bottom shows 'Internet' and '100%' zoom.

This page displays all policy parameters, endorsements, approved SBCL's & IBCL's, pending (in-process) and saved applications. Links in the top right corner provide access to common policy management activities such as viewing policy documents, requesting new SBCL/IBCL's, reporting shipments, and requesting policy amendments and assignments. Links to many of these activities are also available as "shortcuts" from the exporter and broker landing pages.

## 6. Submit New SBCL/IBCL Application

### *Instructions*

Once a policy is in-force, both the exporter and broker are able to complete SBCL/IBCL applications. However, only the exporter is able to complete the final step of certifying and submitting the application.

The screenshot displays the Ex-Im Online web application interface. At the top left is the Ex-Im Online logo with the text "Assisting Export Financing" and "UAT Edition". At the top right, it shows the user is logged in as "us\_exporter" with links for "My Profile", "Change Password", and "Logout". A navigation bar contains "Ex-Im Online Home" and the website URL "www.exim.gov".

The main content area is titled "Exporter: US Exporter, Inc." and "SBCL Insurance Application". A green bar highlights the "Instructions" section. The text provides the following information:

- Upon submission, a tracking number will be provided allowing you to track the application's progress.
- Click on this [Country Limitation Schedule](#), to see if Ex-Im Bank is open for coverage in the country of your buyer, the guarantor (if any), or the buyer's end user. Credit Information required is based on the requested amount.
- (A) **Up to \$100,000:** Your credit history with the buyer for the last three years, or a current trade reference whose credit limit and payment terms are at least half of those you request, or a current credit agency report.
- (B) **\$100,001 - \$300,000:** Current credit agency report **and** either your credit history with the buyer or a trade reference as qualified above.
- (C) **\$300,001 - \$1,000,000:** "B" above, plus attach or fax the buyer's audited or signed unaudited financial statements with notes for the last two fiscal years.
- (D) **More than \$1,000,000:** "B" above, plus attach or fax buyer's audited financial statements with notes and auditor's opinion for the last three fiscal years.

Additional instructions include:

- Point/Click in the Navigation Area** to the left to access any application section. Submit the application when all required sections are completed (marked by ✓).
- Click on **"Save and Exit"** to save entered information and exit the online system. Log back in any time to enter more information and/or submit the completed application.
- To **Print a copy of the application** for your records click on the Summary link and choose the print option within the browser.
- TO START:** Click on **"Continue"** below.
- For **Help contact** your export credit insurance broker or Ex-Im Bank at 202-565-3681 (8:00 AM - 5:00 PM eastern standard time)

On the right side, a "Tracking #: 441404" is displayed above a "Done" button and a "Application Sections" menu. The menu lists: Instructions (checked), Buyer, General Questions, Products, Limit/Terms, Buyer Experience, Guarantor, Credit Report, Financial Statements, Trade Reference, Comments, Attachments, Summary, and Submit Application.

At the bottom of the application area are "Back" and "Continue" buttons. The browser status bar at the very bottom shows "Done", "Internet", and "100%" zoom.



## 7. Shipment Reporting

Begin by clicking on “Report Shipments” from the Landing Page.

The screenshot displays the Ex-Im Online web application interface. At the top, there is a navigation bar with links for 'Ex-Im Online Home', 'EXIM.gov', and 'Contact Us'. The user is logged in as 'us\_exporter' and has options for 'My Profile', 'Change Password', and 'Logout'. The main header features the Ex-Im Online logo and the text 'Assisting Export Financing UAT Edition'. Below the header, the user's profile information is shown: 'US Exporter, Inc.', 'Business Address: 1 Main Street, Chicago, IL 60302', and 'Primary Contact'. A central section titled 'What would you like to do today?' contains two columns of links. The left column, 'Act/Manage Transactions', includes links for 'Act' (Apply for Insurance Policy or Guarantee, Act on Quote, Apply for SBCL, Apply for IBCL, Continue a Saved Application) and 'Manage' (Amend a Policy or Guarantee, Assign Insurance Policy Proceeds, Report Shipments - What's New, Make A Payment, Report Overdues). A red arrow points to the 'Report Shipments - What's New' link. The right column, 'View', includes links for 'My Portfolio' (Pending Applications, Insurance In Force/Recently Expired Policies, Insurance Policy Assignments, Authorized + Non-Operative Guarantees, Operative Guarantees) and 'Historical Transactions' (Maintain Broker, My Company Profile). The bottom of the page shows a browser status bar with 'Internet' and '100%' zoom.

To enter the shipment reporting module the user must first indicate whether there are any overdues to report or update. While this step is required of anyone viewing shipments (broker, lender, policyholder, etc.) it is only meant as a reminder, and the response is not reported to Ex-Im Bank.

Ex-Im Online Home | EXIM.gov | Contact Us

Ex-Im Online  
Assisting Export Financing  
UAT Edition

Logged in as: [us\\_exporter](#) | [My Profile](#) | [Change Password](#) | [Logout](#)

Ex-Im Online Home

**Insured:**  
**US Exporter, Inc.**

**Shipment Reporting**

Add Shipments - Update/Add Overdue Receivables

**Policy Information**

Policy Number:	441401	Policy Type:	ENB
Policy Period:	10/01/2009 - 10/01/2010	Policy Status:	Issued ( on 11/03/2009 )
Insured Name:	US Exporter, Inc.		
Broker Name:	One Broker		

Select an option below, then click 'Continue'.

- Update overdue receivables
- Add overdue receivables
- No overdues to report or update

Continue

Done

Internet 100%

## Step 1 – New/Saved Shipments

The shipment reporting module is consolidated which allows the exporter to add a new shipment, add a new buyer (SBCL approved buyers automatically populate the buyer list) or continue a saved but not yet submitted shipment.

**Assisting Export Financing**  
UAT Edition

Ex-Im Online Home

**Insured:**  
**US Exporter, Inc.**

**Shipment Reporting**

**Add Shipment**

To enter a shipment, select your Buyer from the list below, enter details and select "Add Shipment". Saved shipments are available below for update or removal prior to submission. To submit shipments, click on "Validate Shipment". To add or remove a Buyer from the list, select "Add/Manage Buyers".

**Policy Information**

Policy Number:	441401	Policy Type:	ENB
Policy Period:	10/01/2009 - 10/01/2010	Policy Status:	Issued ( on 11/03/2009 )
Insured Name:	US Exporter, Inc.		
Broker Name:	One Broker		

**Select Buyer**

Name:  City:  Country:

3 items found, displaying all items. Items per page: [10](#) [25](#) [50](#) [100](#)

Select	Name	City	Country
<input checked="" type="radio"/>	Best Baby Clothes of Florence	Florence	ITALY
<input type="radio"/>	Best Baby Clothes of France	Paris	FRANCE
<input type="radio"/>	Best Baby Clothes of Italy	Roma	ITALY

\* Coverage Type:

\* Risk Category Type:

\* Transaction Type:

\* Month-end Date:  (mm/dd/yyyy)

\* Amount: \$

\* Payment Term:

## Step 2 – Select the Buyer

Select a buyer either from the pre-populated buyer list by clicking on the radio button next to that buyer or use the “Select Buyer” search functionality to search for a particular buyer.

Buyer Name:  One Buyer:

[Add Overdues](#)  
[View/Update Overdues](#)

**Select Buyer**

Name:  City:  Country:

3 items found, displaying all items. Items per page: [10](#) [25](#) [50](#) [100](#)

Select	Name	City	Country
<input checked="" type="radio"/>	Best Baby Clothes of Florence	Florence	ITALY
<input type="radio"/>	Best Baby Clothes of France	Paris	FRANCE
<input type="radio"/>	Best Baby Clothes of Italy	Roma	ITALY

\* Coverage Type:  \* Month-end Date:  (mm/dd/yyyy)

\* Risk Category Type:  \* Amount: \$

\* Transaction Type:  \* Payment Term:

The following shipments are saved.

One item found. Items per page: [10](#) [25](#) [50](#) [100](#)

Confirmation #	Buyer/Issuing Bank Name	Buyer/Issuing Bank Country	Exporter Name	Shipment Date	Amount	Rate	Premium	Indicator	Update	Remove
<a href="#">577540</a>	Best Baby Clothes of Florence	ITALY	US Exporter, Inc.	10/31/2009	50,000.00	0.55	275.00	DCL	<a href="#">Update</a>	<a href="#">Remove</a>

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**Step 3 - Add Shipments – Detail**

**Insured:**  
**US Exporter, Inc.**

**Shipment Reporting**

**Add Shipment**

To enter a shipment, select your Buyer from the list below, enter details and select "Add Shipment". Saved shipments are available below for update or removal prior to submission. To submit shipments, click on "Validate Shipment". To add or remove a Buyer from the list, select "Add/Manage Buyers".

**Policy Information**

Policy Number: 441401      Policy Type: ENB  
 Policy Period: 10/01/2009 - 10/01/2010      Policy Status: Issued ( on 11/03/2009 )  
 Insured Name: US Exporter, Inc.  
 Broker Name: One Broker

**Select Buyer**

Name:  City:  Country:

3 items found, displaying all items.      Items per page: [10](#) [25](#) [50](#) [100](#)

Select	Name	City	Country
<input type="radio"/>	Best Baby Clothes of Florence	Florence	ITALY
<input checked="" type="radio"/>	Best Baby Clothes of France	Paris	FRANCE
<input type="radio"/>	Best Baby Clothes of Italy	Roma	ITALY

\* Coverage Type:

\* Risk Category Type:

\* Transaction Type:

\* Month-end Date:  (mm/dd/yyyy)

\* Amount:

\* Payment Term:

Once the buyer to report has been selected complete the shipment details. All shipment reporting values will persist except for "Amount" when adding another shipment.

All shipments made during a particular month may be reported all at once at the end of the month or reported on a shipment by shipment basis. Thus the field for "Month-end Date" may contain either the date of the last day of the month or a particular day during the month. Online will not accept shipment reports with future dates only today's date or dates in the past.

## Step 4 Add/Manage Buyers

Using the Add/Manage Buyer link you can add new Discretionary Credit Authority (DCL) buyers and manage the pre-populated buyer list. However, you can only add new buyers if they are associated with a shipment report. New buyer records can't be created and then saved for use in future shipment reports.

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Ex-Im Online  
Assisting Export Financing  
UAT Edition

Logged in as: [us\\_exporter](#) | [My Profile](#) | [Change Password](#) | [Logout](#)

Ex-Im Online Home

**Insured:**  
**US Exporter, Inc.**

**Shipment Reporting**

**Manage Buyers/Issuing Banks**

**Policy Information**

Policy Number: 441401      Policy Type: ENB  
 Policy Period: 10/01/2009 - 10/01/2010      Policy Status: Issued ( on 11/03/2009 )  
 Insured Name: US Exporter, Inc.  
 Broker Name: One Broker

To add a new Buyer/Issuing Bank click on the 'Add New' button.

Our System indicates you have worked with the following Buyers/Issuing banks. Click on the 'View' link in each row to view its details. To remove a Buyer/Issuing Bank from the list, click on the "Remove" link.

3 items found, displaying all items.      Items per page: [10](#) [25](#) [50](#) [100](#)

Name	City	Country	Actions
Best Baby Clothes of Florence	Florence	ITALY	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Remove</a>
Best Baby Clothes of France	Paris	FRANCE	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Remove</a>
Best Baby Clothes of Italy	Roma	ITALY	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Remove</a>

[Back](#)   [Add New](#)

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### Step 5 – Review / Update / Remove Saved Shipments

You can review, update or remove shipments as necessary.

Once the shipment report is ready for submission, click on the validate shipment button.

Name:  City:  Country:  Search

3 items found, displaying all items.  
1 Items per page: [10](#) [25](#) [50](#) [100](#)

Select	Name	City	Country
<input type="radio"/>	Best Baby Clothes of Florence	Florence	ITALY
<input type="radio"/>	Best Baby Clothes of France	Paris	FRANCE
<input type="radio"/>	Best Baby Clothes of Italy	Roma	ITALY

\* Coverage Type:  \* Month-end Date:  (mm/dd/yyyy)  
 \* Risk Category Type:  \* Amount: \$   
 \* Transaction Type:  \* Payment Term:

The following shipments are saved.

2 items found, displaying all items.  
1 Items per page: [10](#) [25](#) [50](#) [100](#)

Confirmation #	Buyer/Issuing Bank Name	Buyer/Issuing Bank Country	Exporter Name	Shipment Date	Amount	Rate	Premium	Indicator	Update	Remove
<a href="#">577550</a>	Best Baby Clothes of France	FRANCE	US Exporter, Inc.	10/31/2009	100,000.00	0.55	550.00	DCL	<a href="#">Update</a>	<a href="#">Remove</a>
<a href="#">577540</a>	Best Baby Clothes of Florence	ITALY	US Exporter, Inc.	10/31/2009	50,000.00	0.55	275.00	DCL	<a href="#">Update</a>	<a href="#">Remove</a>

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## Step 6 – Validation Results and Submit Shipment Report

The shipments are compared against basic policy parameters, and the results are displayed below.

Shipment details can be viewed by clicking on the shipment confirmation # link. To submit click on the 'Submit Shipment Report' button.

Total Premium Due: 825.00  
 Total Premium Paid: 0.00  
 Name of Preparer:   
 Phone #:   
 Date Prepared: 11/03/2009 (mm/dd/yyyy)  
 Filing Date: 11/03/2009 (mm/dd/yyyy)  
 Date Submitted: 11/03/2009 (mm/dd/yyyy)  
 Certification Statement: [Display](#)

[View/Update Overdues](#)  
[Add Overdues](#)  
[View/Update Overdues](#)

**\*Note:** Shipments are not covered until premium is received by Ex-Im Bank.


Approved Shipments: The following shipment(s) are available for submission.

2 items found, displaying all items.  
 1 Items per page: [10](#) [25](#) [50](#) [100](#)

Shipment Details				
Buyer	Buyer Country	Exporter	Remove	Update
Best Baby Clothes of Florence	ITALY	US Exporter, Inc.	<a href="#">Remove</a>	<a href="#">Update</a>
Shipment Date	Shipment Amount	Premium Due	Shipment Confirmation #	
10/31/2009	50,000.00	275.00	<a href="#">577540</a>	
<b>Validation Message</b>				
Shipment amount is greater than DCL limit. The shipment amount limit for the DCL is \$40,000 and currently, the transaction is only eligible for partial coverage. To apply for an increase in coverage please click on the link to apply for SBCL/IBCL for application information and to review the Short-term credit standards required for your policy.				

Buyer	Buyer Country	Exporter	Remove	Update
Best Baby Clothes of France	FRANCE	US Exporter, Inc.	<a href="#">Remove</a>	<a href="#">Update</a>
Shipment Date	Shipment Amount	Premium Due	Shipment Confirmation #	
10/31/2009	100,000.00	550.00	<a href="#">577550</a>	
<b>Validation Message</b>				
Transaction is accepted but it appears to be a duplicate. Please verify information displayed prior to submission. Shipment amount is greater than DCL limit. The shipment amount limit for the DCL is \$40,000 and currently, the transaction is only eligible for partial coverage. To apply for an increase in coverage please click on the link to apply for SBCL/IBCL for application information and to review the Short-term credit standards required for your policy.				



Done Internet 100%



## Viewing Previously Submitted Shipment Reports

Please note that submitted shipment reports can be viewed according to the month in which the shipments occurred. The system provides total shipment amount, premium amount, and any payments that have been applied.

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Ex-Im Online  
Assisting Export Financing  
UAT Edition

Logged in as: [us\\_exporter](#) | [My Profile](#) | [Change Password](#) | [Logout](#)

Ex-Im Online Home

**Insured:**  
**US Exporter, Inc.**

**Shipment Reporting**

[View Reports - Select Report](#)

**Policy Information**

Policy Number: 441401      Policy Type: ENB  
 Policy Period: 10/01/2009 - 10/01/2010      Policy Status: Issued ( on 11/03/2009 )  
 Insured Name: US Exporter, Inc.  
 Broker Name: One Broker

**Shipment Report**

Shipments made in the month of:

One item found.  
1      Items per page: [10](#) [25](#) [50](#) [100](#)

Report Confirmation #	Reporting Month	Date Submitted	Shipment Amount	Premium Amount	Premium Paid
<a href="#">20091103447553</a>	October 2009	11/03/2009	150,000.00	825.00	0.00
<b>TOTAL</b>			<b>\$150,000</b>	<b>\$825</b>	<b>\$0</b>

[New/Saved Shipments](#)  
[Report No Shipments](#)  
[View Pending RM Shipments](#)  
[View Rejected Shipments](#)  
[View Late Shipments](#)  
▶ [View Reports](#)  
  
[Add Overdues](#)  
[View/Update Overdues](#)

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Done      Internet      100%

## “No Shipment” Reports

For multi-buyer policies, we request that the policy holder submit “No Shipment” reports for those months during which they have no export shipments to report for coverage under their policy. No shipment reports will also be available for reviewing.

The screenshot shows the Ex-Im Online web application interface. At the top, there is a navigation bar with links for 'Ex-Im Online Home', 'EXIM.gov', and 'Contact Us'. The user is logged in as 'us\_exporter' with links for 'My Profile', 'Change Password', and 'Logout'. The main header features the Ex-Im Online logo and the text 'Assisting Export Financing UAT Edition'. The page title is 'Insured: US Exporter, Inc. Shipment Reporting'. A green bar highlights the 'Report No Shipments' section. Below this, there is a 'Policy Information' section with fields for Policy Number (441401), Policy Type (ENB), Policy Period (10/01/2009 - 10/01/2010), Policy Status (Issued ( on 11/03/2009 )), Insured Name (US Exporter, Inc.), and Broker Name (One Broker). A 'Shipment Report' section prompts the user to enter a date range for no shipment activity duration, with a reporting period of November 2009. Other fields include Total Premium Due (\$0.00), Name of Preparer, Phone #, Date Prepared (11/03/2009), and Filing Date (11/03/2009). A 'Display' link is provided for the Certification Statement. A 'Continue' button is located at the bottom of the form. On the right side, there is a sidebar with links for 'New/Saved Shipments', 'Report No Shipments', 'View Pending RM Shipments', 'View Rejected Shipments', 'View Late Shipments', 'View Reports', 'Add Overdues', and 'View/Update Overdues'. The footer of the page contains the text 'JOBS THROUGH EXPORTS' and a browser status bar showing 'Internet' and '100%' zoom.

## Overdue Reporting

Ex-Im Bank requires that policy holders report overdue buyers Online according to the terms of their policy.

**Ex-Im Workflow:**
**Process Overdue**

Overdue Receivables- Shipment Search

**Policy Information**

Transaction Number: 441401      Transaction Type: ENB  
 Transaction Period: 10/01/2009 - 10/01/2010      Transaction Status: Issued ( on 11/03/2009 )  
 Insured/lender Name: US Exporter, Inc.  
 Broker Name: One Broker

**To identify an Overdue Buyer/Borrower enter the search criteria below:**

Buyer/Borrower Country:

Buyer/Borrower Name:

Shipment Date Range:  (mm/dd/yyyy) to  (mm/dd/yyyy)

**Shipments Previously Reported:**  
 To add an Overdue Receivable for a shipment, please click on the 'Add Overdue' link in the Add/Update Overdue column.  
  
 To update an Overdue Receivable associated with the shipment, please click on the 'Overdue Confirmation #' link in the Add/Update Overdue column.  
  
 To View or Update overdues associated with the shipment, please click on the 'View/Update Overdues' link in the right navigation menu.

One item found. Items per page: [10](#) [25](#) [50](#) [100](#)

Shipment Confirmation #	Buyer/Borrower Name	Buyer/Borrower Country	Insured/Lender Name	Shipment Date	Amount	Premium	Status	Transaction Type	Add/Update Overdue
<a href="#">577550</a>	Best Baby Clothes of France	FRANCE	US Exporter, Inc.	10/31/2009	100,000.00	550	Accepted	Open Account	<a href="#">Add Overdue</a>

[New/Saved Shipments](#)

[Report No Shipments](#)

[View Pending RM Shipments](#)

[View Rejected Shipments](#)

[View Late Shipments](#)

[View Reports](#)

[Add Overdues](#)

[View/Update Overdues](#)

Done
Internet 100%

Once "Add Overdue" link is selected, the overdue information can be entered on the following screen.

---

**Shipment Information**

Shipment Confirmation #:	577550	Status:	Accepted
Shipment Date #:	10/31/2009		
DCL/IBCL/SBCL Indicator:	DCL	Endorsement Number:	
Coverage Type:	COMPREHENSIVE	Risk Category Type:	Private
Transaction Type:	Open Account	Payment Terms:	1-30 Days
Amount:	\$100,000.00		

---

**Overdue Information**

Reported Date: 11/03/2009

\* Actual Payment Terms (in days):  (for Example: 45)

\* Due Date:  (mm/dd/yyyy)

\* Overdue Amount: \$

\* Reason Code:

Reason Description:

Payment in Full Date:  (mm/dd/yyyy)

Rescheduled Date:  (mm/dd/yyyy)

---

\* Name of Preparer:

\* Phone #:

\* Date Prepared:  (mm/dd/yyyy)

---

Done Internet 100%

## 8. Broker Management Functions

### *Broker Landing Page*

At first glance the Broker Landing Page is similar in most respects to the Exporter Landing Page, with the exception of the “Broker Commissions” links in the bottom right.

Ex-Im Online Home | EXIM.gov | Contact Us

Logged in as: jcool | [My Profile](#) | [Change Password](#) | [Logout](#)

**Ex-Im Online**  
Assisting Export Financing  
UAT Edition

Ex-Im Online Home

**One Broker**

Business Address:  
1 Eutaw St  
Baltimore, MD 33124

Primary Contact:  
Alex Smith  
(255) 555-5555


What would you like to do today ?

Act/Manage Transactions	View
<b>Act</b> <a href="#">Apply for Insurance Policy or Guarantee</a> <a href="#">Act on Quote</a> <a href="#">Apply for SBCL</a> <a href="#">Apply for IBCL</a> <a href="#">Continue a Saved Application</a>	<a href="#">My Portfolio</a> <a href="#">Pending Applications</a> <a href="#">Insurance In Force/Recently Expired Policies</a> <a href="#">Insurance Policy Assignments</a> <a href="#">Authorized + Non-Operative Guarantees</a> <a href="#">Operative Guarantees</a>
<b>Manage</b> <a href="#">Amend a Policy or Guarantee</a> <a href="#">Assign Insurance Policy Proceeds</a> <a href="#">Report Shipments - What's New</a> <a href="#">Make A Payment</a> <a href="#">Report Overdues</a>	<a href="#">Historical Transactions</a> <a href="#">My Company Profile</a> <a href="#">Broker Commissions</a>

Done Internet 100%

## View "My Portfolio"

The "My Portfolio" link from the Broker Landing Page displays all current transactions with Ex-Im Bank. The # column displays the tracking or policy number, and provides a link to details for each transaction.



[Ex-Im Online Home](#)

---

**One Broker** Business Address:  
1 Eutaw St  
Baltimore, MD 33124 Primary Contact:  
Alex Smith  
(255) 555-5555

**Pending Applications**

14 items found, displaying all items. Items per page: [10](#) [25](#) [50](#) [100](#)

#	Type	Applicant	State	Buyer	Country	Payment Limit	Status	Date Sub
<a href="#">441401</a>	MB-NEW	US Exporter, Inc.	IL			1,000,000.00	Pending, Exporter Underwriting	11/02/2009
<a href="#">440331</a>	SBCL-NEW	textile inc	MA	CA AA2	CANADA	101,000.00	Submitted	05/20/2009
<a href="#">440332</a>	IBCL-NEW	textile inc	MA			100,000.00	Pending, Exporter Underwriting	05/20/2009
<a href="#">440246</a>	SBCL-RENEWAL	textile inc	MA	ksouth s buy	KOREA, SOUTH	101,000.00	Pending, Exporter Underwriting	05/13/2009
<a href="#">441392</a>	MB-RENEWAL	Stone Inc	VA			500,000.00	Pending, Exporter Underwriting	10/30/2009
<a href="#">440321</a>	IBCL-NEW	Rock & Gravel Inc	NY			100,000.00	Pending, Exporter Underwriting	05/19/2009
<a href="#">440320</a>	SBCL-NEW	Rock & Gravel Inc	NY	mex122BB s buy	MEXICO	70,000.00	Pending, Exporter Underwriting	05/19/2009
<a href="#">441058</a>	MB-RENEWAL	Rock & Gravel Inc	NY			500,000.00	Pending, Exporter Underwriting	09/01/2009
<a href="#">440335</a>	IBCL-NEW	Rock & Gravel Inc	NY			100,000.00	Pending, Exporter Underwriting	05/20/2009
<a href="#">441059</a>	MB-RENEWAL	Food Inc	VA			1,000,000.00	Pending, Exporter Underwriting	09/01/2009
<a href="#">439598</a>	IBCL-NEW	Food Inc	VA			100,000.00	Pending, Exporter Underwriting	02/09/2009
<a href="#">440322</a>	MB-NEW	Bridge Machine	NJ			500,000.00	Submitted	05/19/2009
<a href="#">440323</a>	MB-NEW	Bridge Machine	NJ			500,000.00	Submitted	05/19/2009
<a href="#">441315</a>	SBCL-NEW	Bridge Machine	NJ	Agroservicios del Noroeste, S.A. de C.V.	MEXICO	100,000.00	Pending, Exporter Underwriting	09/30/2009

**Insurance In Force/Recently Expired Policies**

5 items found, displaying all items. Items per page: [10](#) [25](#) [50](#) [100](#)

Type	Policy #	Insured	State	Buyer	Country	Credit Limit	Status	Effective Date	Expiry Date
ESC	<a href="#">439570</a>	textile inc	MA			500,000.00	Issued	06/01/2009	06/01/2010
ENB	<a href="#">439560</a>	Stone Inc	VA			500,000.00	Issued	10/01/2008	12/30/2009
ENV	<a href="#">439563</a>	rock inc	NY			500,000.00	Issued	11/01/2008	11/01/2009
ESP	<a href="#">439588</a>	Food Inc	VA			1,000,000.00	Issued	11/01/2008	11/01/2009
ENB	<a href="#">439483</a>	Bridge Machine	NJ			501,000.00	Issued	10/01/2009	10/01/2010

Internet 100%

## View Commission Activity

Information on commissions earned for current and past reporting periods are available by following the “Broker Commissions” link from the Broker Landing Page.

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UAT Edition

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### Broker Commissions

**View Statements - Search**

Reporting Period: (Note: Please specify the month and year of Reporting Period for the Search Criterion.)  
Month:  Year:

Broker Search Result:

One item found.  
1 Items per page: [10](#) [25](#) [50](#) [100](#)

	Broker Name	Reporting Period	Commission Payable
<a href="#">View</a>	One Broker	January, 2009	

JOBS THROUGH EXPORTS

Internet 100%

When the "View" link is selected, the following monthly commission report can be viewed.

07/30/2009  
11:52:27AM

EXPORT-IMPORT BANK OF THE UNITED STATES  
Broker Commission Statement  
February, 2009

BROKER #	7457757	SUB-BROKER	7457757
NAME:	one broker	NAME:	one broker
ADDR:	1 aa St Baltimore , MD 33124	ADDR:	1 aa St Baltimore , MD 33124
TEL:		TEL:	

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NOTE: Bonus Commissions, if applicable, are calculated and paid no earlier than 60 days following the expiration of the applicable policy period.  
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POLICY HOLDER: Bridge Machine  
princeton , NJ

TYPE: ESC POLICY: 439483

SHIP TO DATE	PREM PAID/ADJ	RATE	COMMISSION	REASON
01/01/2009	33.00	15.00	4.95	Shipment Report
01/01/2009	82.50	15.00	12.38	Shipment Report
12/31/2008	115.50	15.00	17.33	Shipment Report
12/10/2008	214.50	15.00	32.18	Shipment Report
01/02/2009	33.00	15.00	4.95	Shipment Report
TOTAL FOR POLICY:	478.50		71.79	
TOTAL FOR POLICY HOLDER:	478.50		71.79	

POLICY HOLDER: rock inc  
huntington , NY

TYPE: ENV POLICY: 439563

SHIP TO DATE	PREM PAID/ADJ	RATE	COMMISSION	REASON
01/01/2009	220.00	40.00	88.00	Shipment Report
01/01/2009	220.00	40.00	88.00	Shipment Report
12/15/2008	192.50	40.00	77.00	Shipment Report
TOTAL FOR POLICY:	632.50		253.00	
TOTAL FOR POLICY HOLDER:	632.50		253.00	

POLICY HOLDER: textile inc  
ballston , VA

TYPE: ESC POLICY: 439570

SHIP TO DATE	PREM PAID/ADJ	RATE	COMMISSION	REASON
12/15/2008	102.50	15.00	15.38	Shipment Report
TOTAL FOR POLICY:	102.50		15.38	
TOTAL FOR POLICY HOLDER:	102.50		15.38	
TOTAL FOR SUB-BROKER:	1,213.50		340.17	

GRAND TOTAL FOR BROKER:	<u>1,213.50</u>	<u>340.17</u>
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## Contact Information

- ***User Account Questions/Issues***

- Nicole Valtos 202 565 3411 [Nicole.Valtos@exim.gov](mailto:Nicole.Valtos@exim.gov)
- Tara Pender 202 565 3655 [Tara.Pender@exim.gov](mailto:Tara.Pender@exim.gov)
- Sherry May 202 565 3634 [Sherry.May@exim.gov](mailto:Sherry.May@exim.gov)

- ***Application Submission Questions/Issues***

- General Information 202 565 3800 [Exim.Applications@exim.gov](mailto:Exim.Applications@exim.gov)
- Insurance Applications
  - Traleeta Flowers 202 565 3372 [Traleeta.Flowers@exim.gov](mailto:Traleeta.Flowers@exim.gov)
- Loan/Guarantee Applications
  - Louanta Gage 202 565 3473 [Louanta.Gage@exim.gov](mailto:Louanta.Gage@exim.gov)
  - Candice Woods 202 565 3220 [Candice.Woods@exim.gov](mailto:Candice.Woods@exim.gov)

- ***Shipment Reporting/Premium Payment Questions/Issues***

- Patricia Gaughan 202 565 3281 [Patricia.Gaughan@exim.gov](mailto:Patricia.Gaughan@exim.gov)
- Yolanda Cuthbertson 202 565 3279 [Yolanda.Cuthbertson@exim.gov](mailto:Yolanda.Cuthbertson@exim.gov)

- ***Commission Payments Questions/Issues***

- Donna Cardwell 202 565 3459 [Donna.Cardwell@exim.gov](mailto:Donna.Cardwell@exim.gov)