



EULER HERMES



(Euler Hermes On-Line Information Service)

Quick Reference Guide

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1. INTRODUCTION

a. Welcome to EOLIS!

EOLIS is devoted to helping you manage and administer your credit insurance policy easily and efficiently. Due to the amount of functionality included in the system, we have developed this guide to help you become more familiar with EOLIS.

The system has been optimized to work with a **screen resolution** of 1024x768 pixels. Other resolutions may result in buttons at the bottom of the page being obscured from view. If this happens, please maximize the screen or change your screen resolution accordingly (On your PC, Go to START → Control Panel → Display → Settings).

b. Help!

If there is an aspect of EOLIS that is not addressed in this guide, please contact your policy service team (Account Manager, CSA, or Agent). Additionally, you can contact the Euler Hermes ACI Helpdesk with any questions, including login or other technical issues. They can be reached by email or telephone, as outlined below.

Email: EHACI.Helpdesk@eulerhermes.com

Phone: 1-888-269-5653

Hours: 7 am to 7pm Eastern, Monday - Friday

2. SIGNING IN

To access EOLIS, please sign in through the following web site address:

<https://eolis.eulerhermes.com/us>

a. First Login

If you haven't already been given a User ID and password, please contact a member of your service team first (Account Manager, CSA or Agent). Alternatively, you can contact the Helpdesk from your business line. For verification purposes, please have available:

1. Your Euler Hermes Policy Number
2. The inception date of your policy
3. Zip Code

Your User ID and password are assigned by the system and will be emailed or relayed over the phone. For security purposes, we may need to verify additional information before giving you your login

credentials. After opening the web site, enter your User ID and Password. Upon logging in, you will be asked to create your own custom password. Your password will need to contain certain elements as listed on the "Change Your Password" Screen. For additional protection, your password is only valid for 90 days – you will be automatically prompted to change at that time. Additionally, you will be required to fill in some basic personal information for communication purposes.

b. Other login page functions and tips

Adding to Favorites: When you access this page for the first time, we recommend that you select the link which reads 'Click here to add this page to your favorites'. EOLIS will now be bookmarked on your PC for easy access in the future. For additional ease of use, you can also save your username by checking the "Remember Login Information" box. For security purposes, your Password cannot be bookmarked.

Pop Up Settings: If you have trouble accessing EOLIS, it is possible that your internet settings are preventing the website from loading properly. The EOLIS home page is generated by way of a 'pop up' window. Therefore, if you have a 'pop up blocker', you will need to alter those settings to properly access EOLIS. In most cases, your pop-up blocker will alert you and allow you to "always accept pop-up from this site". Otherwise, you can change manually, but clicking "Tools" → "Pop-up Blocker" and set to "off".

I forgot My Password! Don't worry! Simply click on "Forgotten your password?" on the login page and follow the instructions – upon completion, we will automatically email your password to the email address on file or to the one you specify (if the email address you enter does not match the one in your profile, an email will be sent to both addresses).

Language Preference: Habla Espanol? ¡No problema! EOLIS is fluent in English, Spanish, and Canadian French....pick your preferred language. Click "Remember login information" and we'll save your username and language preference to your computer.

EOLIS Assistance: No access to email? At the top right-hand corner of the login screen is a link to EOLIS Assistance. Here, you can send a formatted message to our Helpdesk or give us a call.

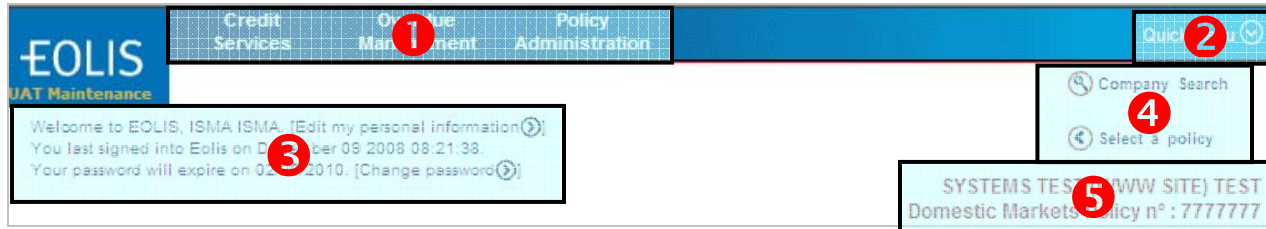
Legal Notice: What would the world be without lawyers? Well, we probably wouldn't need this link. Click here for our "Terms of Use" and other important legal information.

Did You Know???

In instances where a back button is not available, you can navigate to a previous page by hitting the "Backspace" button on your keyboard!

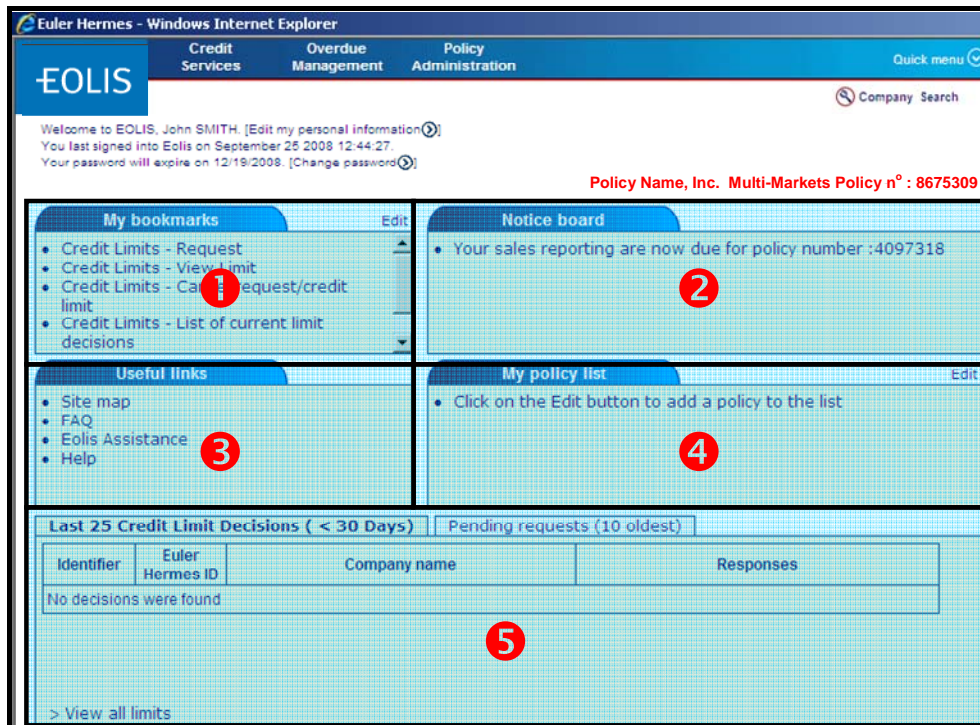
3. NAVIGATION - Overview

a. Main Menu



1. **Credit Services, Overdue Management, Policy Administration:** Primary access to policy functions by category: clicking on any of these 3 items will open a drop down of a sub-menu that will allow access to specific functions
2. **Quick Menu:** One-stop access to all EOLIS functions - **RECOMMENDED FOR EASIEST NAVIGATION!**
3. **Security Information:** Displays: i.) User Identifier with link to edit personal information, ii) Last login date/time, and iii) Date that current password will expire with link to change at any time.
4. **Company Search and Select a policy:** Allows user to search for a buyer and, if applicable, easily manage multiple policies
5. **Policy Identifier:** Displays information relating to the policy you are currently working on, including the policy registration (usually a company name), type of policy, and policy number.

b. Welcome Page



The Welcome Page is the nerve center of your EOLIS interface. Here, you will find quick links to common and/or frequently used functions.

1. **My Bookmarks:** You may add up to 6 commonly used tasks to a list of bookmarks (i.e.: Coverage requests, Past Due Reports, etc). Simply select the "Edit" button and choose from the list of available functions.
2. **Notice board:** If there is a message which requires your attention, it will be posted here. Urgent messages will pop-up when you initially log on to the system.
3. **Useful Links:** Quick access to a site map of EOLIS, Frequently Asked Questions (FAQ), Assistance (contact us by email or phone), and [this] "Help" guide.
4. **My policy list:** Most users only have one policy to manage. However, for those with multiple policies, we've created easy access to the 5 you use most. Select the "Edit" button in order to add or remove a policy to the list. **Note: this list is static and completely controlled by the user. When your policy expires and a new policy is put in force, you will need to remove the old policy from the list and add the new one with the "edit" function.**
5. **List of Credit Limit Decisions:** For your convenience, we display the last 25 credit limit decisions and the 10 oldest requests that are still pending in our system – **ALL IN REAL TIME!** Simply click on the applicable tab to view. Additionally, if your total number of limits exceeds what's displayed on the screen, simply click on "View all limits" to pull the entire list

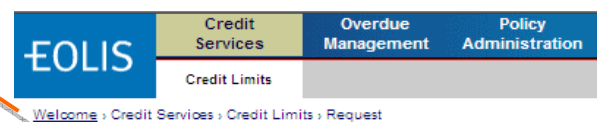
Other Welcome Page functions:

Selected Company Detail – if you already have a buyer in the "queue", this link will show the basic information regarding that buyer

EOLIS Assistance – send a formatted electronic message or call us

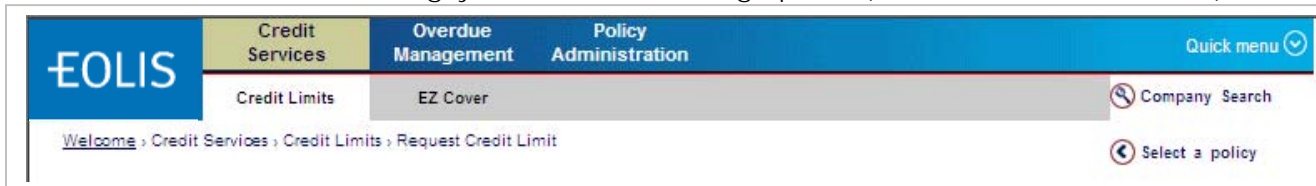
Sign Out – click here to end your EOLIS session

HINT! You may return to the Welcome Screen at any time by clicking on the "[Welcome](#)" link at the top left corner of the screen. This is also called a "Breadcrumb" because it leads you back to where you started!



4. CREDIT SERVICES

Under the “Credit Limits” sub-heading, you have the following options (click on link to fast forward):



- **Request** – Submit a new buyer for coverage
- **View Limit** - View/Search for a covered named buyer
- **Cancel request/credit limit** - Cancel a current or pending credit limit request
- **List of current limit decisions** – view all decisions related to your credit limit requests

a. Request a NEW limit

First, click on the “Request Credit Limit” from the Main or Quick Menu. You will need to identify your buyer by one of the following methods: 1) Euler ID or DUNS number, 2) company name (& address), or 3) company phone number. If searching by name, please note that more complete information yields better results (fields with an * are mandatory). *Note: If you cannot find the company on our system, please select “Not Found”.* The next page will prompt you to enter all relevant information and take you through the remainder of the process.

- **Requested Amount:** Enter amount of desired coverage
- **Terms of Sale:** Optional; enter a value in this box **only** if the terms for this particular buyer are GREATER than your policy’s standard terms of sale. For terms of sale less than or equal to your policy’s standard terms, leave blank.
- **Add a Comment:** Optional: enter any pertinent information that will help our underwriter make a decision. *Note: We understand that most requests are urgent and promise to always answer your requests as quickly as possible. Entering comments that are not critical will delay the decision (ie: “Please rush”, “Order pending”, “New Customer”, etc)*
- **Your Customer Reference:** this refers to a reference number, ID, or other code that you use internally to identify the buyer.
- **Past Dues/Outstandings:** Coverage may be contingent upon any past dues that exist at the time of a Credit Limit Request. Therefore, it is imperative that you notify us if any exist. Click on “Declare past dues” button at the bottom of the page and follow the instructions.

b. Change an existing limit

- i) **Increase a limit:** First, you’ll need to find the existing buyer. From the Welcome Screen, go to “Last 25 Credit Limit Decisions” and click “View all limits”. By default, the limits are sorted by date – Click on “Company Name” to sort alphabetically. Select the buyer and their detail

screen will appear. Next, select "Increase Limit", and the following screen appears...enter the applicable information and hit "Continue"

Credit Limit Request

Latest decision : Agreement : 15,000 USD


Permanent Limit : 15,000 USD Date :12/09/2008

Request pending: 25,000 USD Date :12/09/2008

Limit request :


Amount : USD ?


Standard credit period as in your policy : 60 days

Credit period if not within those mentioned above : days  Add a comment

Your customer reference :

If you enter a credit period longer than your standard credit period and / or if you add a comment, your request will be referred to an U/W for a decision.
If you have Outstandings / Past dues on this buyer, select 'Declare past dues' otherwise select 'Continue'.

Declare past dues 

Continue 

- ii) **Cancel or Reduce a limit:** Follow the directions to find the buyer as described in (i) above to display the buyer detail screen. Here, you will find access to both functions. See illustration below...

Credit limit enquiry Euler Hermes ACI confidential

Current credit limit :

Latest decision : Agreement : 15,000 USD

Permanent Limit : 15,000 USD Date : 12/09/2008 [Reduce limit](#)

Request confirmation id : 84350239

Your customer reference : [Update your customer reference](#)

Credit limit request pending

Latest request : 12/09/2008 Awaiting decision


Amount : 25,000 USD


Your customer reference :


Request confirmation id : 84358474


Comment : no comment entered


Coverage is subject to the terms and conditions of your policy, including prompt payment.

Cancel 

Print 

New request 

History 

Back 

Click here to **REDUCE** coverage

Click here to **CANCEL** coverage

Click here to **INCREASE** coverage

c. Credit Limit Reports

This process allows you to generate a customized credit limit report, using a number of filters. By default, "All the decisions" is selected which provides a full list of all credit limit requests, regardless of the decision (agreement, withdrawal, etc). You can "view" the list on screen or "download" to Excel.

The screenshot shows the EOLIS system interface. At the top, there is a navigation bar with tabs for Credit Services, Overdue Management, and Policy Administration. A 'Quick menu' icon is on the right. Below the navigation bar, a 'Credit Limits' dropdown menu is open, showing options: Request, View Limit, Cancel request/credit limit, and List of current limit decisions. A hand cursor is pointing at the 'List of current limit decisions' option. The main content area is titled 'Selection criteria' and contains a warning: 'Dates must be entered in mm/dd/yyyy format.' Below this, there is a 'Country' dropdown menu set to 'All countries'. The 'Current limits' section has several radio button options: 'All the decisions' (selected), 'Buyer/Business Name', 'Euler ID', 'Customer reference', 'Current limits' (with a 'requested' dropdown and 'between' date range fields), 'Amounts' (with a 'requested' dropdown and 'between' date range fields and a 'USD' dropdown), 'with conditions only', 'temporary limits only', and 'Expired limits'. The 'Pending requests' section has a radio button option 'all pending requests'. The 'Current limits and pending requests' section has a radio button option 'Request confirmation id' and a text input field.

5. OVERDUE MANAGEMENT

“Overdue Management” is the phrase that we use to describe all functions relating to those buyers who fail to pay you on time. By clicking on “Overdue Management” at the top of the screen, you will activate three sub-menus, including:

- **Past Due Report** - File and view your monthly Past Due Reports
- **Claims management** - File new claims and view existing claims
- **Collections management** - File new placements and view details for Insured and uninsured claims.

a. Past Due Reporting (PDR)

i) **Declaration** - If you are reporting a buyer past due, you must first identify the buyer (see Figure 1 below) by selecting one of the following.

- **New buyer** – perform a search to identify a buyer with Discretionary coverage (that is, not “named” to your policy)
- **Previous past due buyers** – pulls a list of buyers related to prior past due reports

- **Buyer from list of current limit decisions** – report a buyer

EOLIS Credit Services Overdue Management Policy Administration Quick menu

Welcome > Overdue Management > Past Due Report > Declaration

Company Search Select a policy

Selection criteria

SYSTEMS TEST (WWW SITE) TEST
Domestic Markets Policy n° : 7777777

I would like to report past dues on a....(for the current period 11/2008)

☒ New buyer (Discretionary coverage)
☐ Previous past due buyer
☐ Buyer from the list of current limit decisions

Continue ➔

As always, if you cannot find the company in our system, you may confirm the buyer is 'Not Found' and provide as much detail as possible – address, phone, etc. Even though the buyer is not “confirmed” you can still proceed with the report.

Once you identify your buyer, you will need to provide a number of details including the overdue & total amounts, the oldest due date, terms of sale, any relevant comments relating to the past due, etc. (see below, figure 2). *At least* one “Amount xx days past due” field must be populated or an error will occur.

Past due declaration

You are declaring this buyer past due for the 11/2008 period (Please omit decimal places)

* mandatory

Declaration date : 12/08/2008 (mm/dd/yyyy) * Reason : Currency : USD

* Total amount owed :

Amount 60 days past due :

Amount 90 days past due :

Amount 120 days past due :

* Terms of sale :

Comments (up to 90 characters) :

Cash Flow
Chargeback
Dispute
NSF
Other/Describe
Payment Expected
Simple Overdue
Slow Pay
Unapplied Credit

* mandatory

Confirm ➔

- ii) **View list of past dues** - Here, you can view reports from previous declaration periods (months). The current month and year is shown by default. To change, simply enter the month and year

(mm/yyyy) or click on the calendar icon. A calendar with the current month and year will appear - click on the left and right arrows to find the correct month then click anywhere on the calendar to select that month. Select "Continue" to find the applicable report.

SYSTEMS TEST (WWW SITE) TEST
Domestic Markets Policy n° : 7777777

Selection criteria

* mandatory

* Declaration month : (mm/yyyy)

* mandatory

b. Claims Management

Filing a claim on EOLIS is fast and easy. All you need is the debtor contact information and your invoices (if Insolvent, the details regarding the insolvency is required). To find the buyer, simply follow the buyer identification procedure in "[Past Due Reporting – Declaration](#)" above. Once identified, follow the instructions on the screen. When you get to the "Invoices" section, enter the number of invoices outstanding for that debtor. Input the invoice detail of the oldest invoice and click "Add Invoice" to enter the next oldest, etc. If your invoice total exceeds 50, you will need to fax, mail or email your invoices to us for processing.

Invoices :

Invoice number :

In order to add an invoice, please fill in all the following fields and click on the "Add invoice" button.

*Invoice Date <small>(mm/dd/yyyy)</small>	*Ship Date <small>(mm/dd/yyyy)</small>	*Terms ?	*Amount ?	Taxes ?	Other Charges	*Total Invoice Amount ?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Select "View Claims" to pull a list of all claims and their status.

c. Collections Management

This section is built on the same basic interface as "Claims Management" – please see above. You may also view the status of all cases related to the current policy that you are navigating. In addition to the status, you also have access to individual collectors' notes, describing their attempts to contact and interactions with debtors and the disposition thereof.

6. POLICY ADMINISTRATION

Sales Reporting

Whether your policy requires you to declare sales turnover monthly, quarterly or once a year, this task can be accomplished easily and quickly here. Simply choose the relevant period and fill in the appropriate amount. Past reports may be viewed here, as well.

Invoice Report

EOLIS allows you to access all invoices for your policy, whether they are open or paid. You can also export a summary of these invoices to Excel.

Documents

For your convenience, all of your policy documents are stored on EOLIS and may be viewed, downloaded or printed. Also, we have assembled other “frequently used” or common forms, publications, country reports, and more!

Contacts

The *Contacts* section of EOLIS allows you to easily identify your policy servicing team and also allows you to review who has access to your policy through EOLIS. If you would like to revoke a particular user’s access to your policy, please send a request through your service team.