

Euler Hermes Sverige

# EOLIS GUIDES



A company of **Allianz** 

 EULER HERMES



# HOW TO USE EOLIS

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# EOLIS GUIDES

The Euler Hermes Online Information Service, EOLIS, is developed to help you easily manage and administer your credit insurance policy with Euler Hermes. Due to the amount of functionality included in the system, we have developed this user guide to help you become more familiar with EOLIS.

If there is an aspect of EOLIS that is not addressed in this user guide, please contact the Policy Administration with any questions, including login or other technical issues.

They can be reached by email at [contact.se@eulerhermes.com](mailto:contact.se@eulerhermes.com) or call +46 8 555 13 600 Monday thru Friday 08.15 – 16.45.

## HOW TO LOGIN

1. To access EOLIS, please visit [www.eulerhermes.com](http://www.eulerhermes.com) > 'LOGIN' in upper right corner > EOLIS.
2. If you haven't received your user ID and password, please contact the Policy Administration. For verification purposes, please have available:
  - Your Euler Hermes policy number
3. 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.

## LOGIN PAGE FUNCTIONS AND TIPS

### Add to favorites

When you access EOLIS for the first time, we recommend that you add the EOLIS page to your favorites in your browser. EOLIS will now be bookmarked on your computer for easy access in the future. For additional ease of use, you can also save your user ID 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 homepage 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-ups from this site".



# EOLIS GUIDE

## 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.

**EOLIS** Credit Services Overdue Management Information Services Policy Administration Quick menu

Welcome to EOLIS, **Test1 Testesen**. [Edit my personal information]   
 You last signed into Eolis on 04 January 2018 20:39:47.   
 Your password will expire on 06/02/2018. [Change password]

Company Search   
 Select a policy

**Testfirma 1 KOB - Insured credit information n° : 013453**

**My bookmarks** [Edit]   
 • Payment incident   
 • Overdue declaration   
 • Credit Limits - Request   
 • Credit Limits - Cancel request/credit limit

**Notice board**   
 • No active messages

**Useful links**   
 • FAQ   
 • CVR   
 • News from Euler Hermes Danmark, filial af Euler Hermes Europe SA, Belgien   
 • Site map   
 • Eolis Assistance   
 • Help   
 • Economic Research   
 • Access EH SmartView   
 • EH SmartView user guide link

**My policy list** [Edit]   
 • Click on the Edit button to add a policy to the list

**My alerts** Last 25 credit limit decisions Pending requests (10 oldest)   
 • There are proactive alerts affecting one or more of your credit limits; please click here to check your alerts.

1. **My Bookmarks:** You may add up to six commonly used tasks to a list of bookmarks (e.g. credit limit requests, overdue declaration, 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 access to EH SmartView.
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 five most used policies. 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 ten oldest requests that are still pending in our system 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.

## FIRST TIME YOU LOG ON

After logging in the first time, the system tells you that your password has expired and must be changed. You then have to enter a new, personal code.

Your password must meet the following requirements:

1. It must be at least eight characters in the length.
2. It must contain three of the following types of characters: Upper case letters (A-Z), lower case letters (a-z) and numerics (0-9).
3. It may not contain your first or last name.
4. It must be different from the previous password.

For security, your password will expire every third month and must be changed.

It is important that you afterwards go to [Edit my personal information](#) at the top where you must fill in all the fields. As you type your last name, **notice that you must write you last name with upper case letters (A-Z).**

The screenshot shows the EOLIS user interface. At the top, there are navigation tabs: Credit Services, Overdue Management, Information Services, and Policy Administration. A 'Quick menu' icon is on the right. Below the tabs, the user is logged in as 'Test1 Testesen' with a red box around the '[Edit my personal information]' link. The user's last login is '20 Dec 2018 15:21:00' and their password expires on '06/02/2018'. There are also links for 'Company Search' and 'Select a policy'. The main content area is divided into four sections: 'My bookmarks' (with links for Payment incident, Overdue declaration, Credit Limits - Request, and Credit Limits - Cancel request/credit limit), 'Notice board' (with 'No active messages'), 'Useful links' (with links for FAQ, CVR, and News from Euler Hermes Denmark), and 'My policy list' (with a link to 'Click on the Edit button to add a policy to the list').

### Notice!

Remember to allow popup windows before you log on to EOLIS.

## FORGOT YOUR PASSWORD OR USER ID

If you forget your EOLIS password and/or user ID - then go to [www.eulerhermes.com](http://www.eulerhermes.com).

Choose [LOGIN](#) in the upper right corner and choose [EOLIS](#). (To be continued on next page).

The screenshot shows the Euler Hermes login page. At the top left is the Euler Hermes logo, and at the top right is the 'EOLIS' logo. The login form contains the following fields: 'User ID' with a red box around the input field and a help icon, 'Password' with a red box around the input field and a help icon, and 'Language' with a dropdown menu set to 'English'. Below the fields is a 'Remember Login Information' checkbox. At the bottom of the form is a blue 'Connect' button, and below that are two red boxes around the links '> Forgotten password ?' and '> Forgotten User ID ?'.

## FORGOT YOUR PASSWORD OR USER ID (CONTINUED)

If you forget your password > Fill in your user ID and click on [Forgotten password](#). Then fill out all the mandatory field in the following screen display. **You need to write the entire last name with capital letters (UPPER CASE)**. Click on "Send password" and the system will create a new password and sends it automatically to your email address.

EOLIS

Forgot your Password

\*Mandatory

**Have you forgotten your password?**  
If so, a temporary password will be created and sent to the email address stored in your Personal information.

\*Your Last name :  (Uppercase)

\*Your Eolis User ID :

You will receive your new password to access EOLIS shortly. You will be asked to choose a new password when you first log in.

\*Mandatory

**Send Password**

If you forget your user ID > Choose [Forgotten User ID](#). Fill out all the mandatory fields in the following screen display and choose [Forgotten login](#) under [Subject of your message](#) at the drop down menu.

EOLIS

EOLIS Assistance

**If you have any other query relating to the EOLIS service, please contact EOLIS On-Line Services Administration.**  
**+45 88 33 33 88**

**E-mail**

\*Mandatory

\*Company name :

Policy number :

Buyer :  **Buyer EHID :**  **Buyer name :**

\*Title :

\*First name :

\*Last name :

Please select the description below which is closest to your role with regard to your Euler Hermes Policy/contract.

\*Job title :

\*E-mail address :

Telephone No. :  (Numerics only with a + sign in front where relevant)

\*Subject of your message :

Comments :

\*Mandatory

**Send** **Close**

Click [Send](#) to send your request. Our EOLIS support will react on your request as fast as possible and return with password or login.

## REQUEST A CREDIT LIMIT ON A BUYER

To request a credit limit on a buyer you need to log on EOLIS and follow below steps.

### How to do:

1. Click on [Quick menu](#) in the upper right corner of the top menu in EOLIS.
2. Click on [Request](#) under [Credit Limits](#)

The screenshot shows the EOLIS user interface. At the top, there is a navigation bar with tabs for 'Credit Services', 'Overdue Management', 'Information Services', and 'Policy Administration'. A 'Quick menu' button is highlighted with a red box. Below the navigation bar, the user is logged in as 'Test1 Testesen'. The main content area is divided into several sections: 'My bookmarks', 'Notice board', 'Useful links', and 'My policy list'. A 'Quick access...' dropdown menu is open, showing options like 'Credit Limits', 'Request', 'Cancel request/credit limit', 'Grade', 'Overdue declaration', 'Payment incident', 'Collections management', 'Exchange of files', 'Risks', 'Policy information', 'Useful information', and 'Contract file'. The 'Request' option is highlighted with a red box. Below the main content area, there are 'My alerts' and 'Pending requests (10 oldest)' sections.

Select [Country](#) and type either [Euler ID, Identifier](#) or [Company/Business name](#).  
(list of registration numbers in various countries can be found by clicking on [Help on identifier](#))

The screenshot shows the 'Company identification' form in the EOLIS system. The form is titled 'Company identification' and includes a breadcrumb trail: 'Welcome > Credit Services > Credit Limits > Request'. The form is for 'Testfirma 1 KOB - Insured credit information n° : 013453'. The form has several sections:
 

- Select a country:** A dropdown menu with 'DENMARK' selected.
- Search by identifier:** A radio button option. It includes fields for '\* Euler ID:' and '\* Identifier:' (with 'CVR (Denmark)' selected). A 'Help on identifier' link is also present.
- Search Criteria:** A radio button option with a question mark icon.
- Company/Business Name:** A text input field.
- Street Number:** A text input field.
- Street Name:** A text input field.
- Post/Zip Code:** A text input field.
- Town:** A text input field.
- Search by phone number:** A radio button option with a question mark icon.
- Phone number:** A text input field.

 At the bottom of the form, there are 'Continue' and 'Clear' buttons.

Click [Continue](#).

## REQUEST A CREDIT LIMIT ON A BUYER (CONTINUED)

Choose the correct legal unit. Click on the company name.

The screenshot shows the EOLIS navigation bar with tabs for Credit Services, Overdue Management, Information Services, and Policy Administration. The 'Credit Limits' sub-tab is active. Below the navigation bar, there are links for 'Company Search' and 'Select a policy'. The main content area displays 'Company search results' for 'Testfirma 1 KOB - Insured credit information n° : 013453'. A table lists two records for 'Euler Hermes Danmark, Filial af Euler H'. The first record is highlighted with a red box. Below the table, it says '2 records found.' and 'Page 1/1'. At the bottom, there are 'Download options: CSV | Excel'.

Identifier	Euler ID	Company/Business Name	Address
	00	Euler Hermes Danmark, Filial af Euler H	Amerika Plads 19 3 2100 København Ø
	00	Euler Hermes Danmark, Filial af Euler He	Amerika Plads 19 2100 København Ø

Select a company by clicking on the company name.

## BUYER NOT FOUND IN EOLIS

**Notice!** This function is only available if you search by company name!

If you cannot find the company in our system, please select **Not found (as shown above)**. The next page will tell you to enter all relevant information and take you through the remainder of the process.

Remember to click **Continue**.

The screenshot shows the 'Additional information' form for 'Testfirma 1 KOB - Insured credit information n° : 013453'. The form contains the following fields:

- Company/Business Name : Euler Hermes Danmark Filial af Euler Hermes S A Belgien
- Country of Buyer : DENMARK
- National ID : CVR (Denmark) [dropdown] [input]
- Additional Name 1 : [input] ( i.e. Full names of the proprietor(s) or partners, or an alternative trading name for the buyer)
- Additional Name 2 : [input]
- Street Number : [input]
- Street Name : [input]
- Additional Line : [input]
- \* Town : [input]
- \* Post Code : [input]
- Phone Number : [input]

At the bottom of the form, there are two buttons: 'Continue' and 'New Search'.



## REQUEST A CREDIT LIMIT ON A BUYER (CONTINUED)

To begin your request enter the level of coverage desired in the **Amount** field (maximum credit in thousands without using decimal spaces or periods). Round to the nearest EUR.

If you have a reference no. you would like to add you can fill out **Your customer reference**.

If the credit period is longer than agreed upon in the policy, please fill in **Credit Period**. When entering extended terms, please advice on the rationale for the longer dated terms.

Otherwise, this field is left blank.

Credit Limit Request

Latest decision : No current limit

**Limit request :**

Amount :  DKK Danish Krone ?

Standard credit period as in your policy : LU + 10 days  Express process ?

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

Your customer reference :

? Add a temporary increase

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 enter a temporary increase, a comment is mandatory.

## ADD A TEMPORARY LIMIT

You also have the opportunity to request for a temporary limit by clicking [Add a temporary limit](#).

Credit Limit Request

Latest decision : No current limit

**Limit request :**

Amount :  DKK Danish Krone ?

Standard credit period as in your policy : LU + 10 days  Express process ?

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

Your customer reference :

? Add a temporary increase

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 enter a temporary increase, a comment is mandatory.

Credit Limit Request

Latest decision : No current limit

**Limit request :**

Amount :  DKK Danish Krone ?

Standard credit period as in your policy : LU + 10 days  Express process ?

Credit period if not within those mentioned above :  days

Your customer reference :

Negative Buyer Information :  Yes  No

Comment :

Temporary increase : Amount :  DKK Danish Krone ? Expiration date :  (dd/mm/yyyy)

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 enter a temporary increase, a comment is mandatory.

Click [Continue](#).

You will now see the details for buyer and the application. Check that the details are correct and [Confirm](#).

## DOWNLOAD BUYER LIST

To see a list of all buyers in EOLIS you need to log on and follow below steps.

### How to do:

1. Click on [Quick menu](#) in the upper right corner of the top menu in EOLIS.
2. Click on [List of current limit decisions](#) under [Credit Limits](#)

The screenshot shows the EOLIS user interface. At the top, there is a navigation bar with tabs for 'Credit Services', 'Overdue Management', 'Information Services', and 'Policy Administration'. A 'Quick menu' button is highlighted in the top right corner. Below the navigation bar, the user is logged in as 'Test1 Testesen'. The main content area is divided into several sections: 'My bookmarks', 'Notice board', 'Useful links', and 'My policy list'. On the right side, a dropdown menu is open, showing options like 'Credit Limits', 'Request', 'View Limit', and 'List of current limit decisions', which is highlighted with a red box.

Mark [All the decisions](#) and select [View](#).

Notice: You can also choose other search criterias such as Euler ID, Decision Type or Current limits.

The screenshot shows the search interface for 'List of current limit decisions'. The top navigation bar is the same as in the previous screenshot. Below it, the breadcrumb trail reads 'Welcome > Credit Services > Credit Limits > List of current limit decisions'. The main content area is titled 'Selection criteria' and includes a search bar with the text 'Testfirma 1 KOB - Insured credit information n° : 013453'. The search criteria section has several options: 'List' (Current limits), 'Country' (All countries), and 'Search criteria'. The 'All the decisions' radio button is selected and highlighted with a red box. Other search criteria include 'Buyer/Business Name', 'Euler ID', 'Customer reference', 'Decision Type', 'Current limits', 'Amounts', 'with conditions only', and 'Expired limits'. The 'Sort criteria' section is set to 'Descending decision date'. At the bottom, there are three buttons: 'View' (highlighted with a red box), 'Download in .csv format', and 'Download in .xls format'.



## DOWNLOAD BUYER LIST (CONTINUED)

You now get a list of all decisions.


1. You can now either [download](#) or [print](#) the list.
2. You can download the list as a .csv file or as an Excel file. If you print the list, please notice that the maximum number of buyers on each page is 100. If you have more than 100 buyers on your list, please print each page.

Result : 220 customer(s) matching your selection

Page 1 , 2 , 3 from 3 [Next/Last]

Download options: CSV  | Excel 

Click on the company name to see credit limit.  
Access the page directly by clicking on the page number.

[New search](#) 

[Print](#) 

### Notice!

You can sort the list by country, amount etc. before printing or downloading. You do this by clicking on the column, by which you wish to sort the list.

## OVERDUE MANAGEMENT

According to policy you need to make overdue declaration in EOLIS for those buyers who fail to pay on time.

### How to:

1. Log on EOLIS with your user ID and password.
2. Click on **Overdue Management** at the top of the screen.
3. Type the **Euler Hermes ID** for the buyer you want to make an overdue declaration for.
4. Click on **Continue**

You will now see this picture:

## OVERDUE DECLARATION (CONTINUED)

Fill out:

- Type:** Choose the type by clicking on the drop down menu - e.g. "Overdue".  
Please ensure that the most appropriate reason is selected as this will allow our analyst team to determine if an investigation is needed into the health of the buyer.
- Date:** Click on the calendar icon (marked with red below) and choose the original due date.
- Total amount:** Enter the total amount that is past due and then break it down by how long each amount has been outstanding. **All amounts are without use of comma, period or a decimal place.**
- Currency**

**EOLIS** Credit Services Overdue Management Information Services Policy Administration Quick menu

Welcome > Overdue Management > Overdue declaration Company Search Select a policy

**Buyer Details** Testfirma 1 KOB - Insured credit information n° : 013453

TVADK : Euler ID : Type of Company : AKTIESELSKAB

Buyer Name : Registered office : Denmark SIC Activity : Mgt of holding co's

If the details above are not for the required buyer click here to select the correct buyer.

**Overdue declaration**

(\*) data mandatory

Type : Overdue

Date : 06/12/2017 (dd/MM/yyyy)

Total amount : 200000 DKK Danish Krone

31 to 60 days : 200000 DKK Danish Krone

61 to 90 days : DKK Danish Krone

+90 days : DKK Danish Krone

Comment :

(\*) data mandatory

Validate

- Click **Validate**: You will get a message on the screen that the overdue payment has been registered. You will also receive the confirmation on e-mail the next day. The email will be sent to the person registered as EOLIS user.
- Select **New Overdue payment** if you have more payments to register. If not, **Finish**.

## DECLARATION OF TURNOVER

In accordance with the terms stated in your policy contract you must declare turnover for all insured buyers. To complete a turnover declaration you must use EOLIS .

### How to:

1. Click [Select a policy](#) to select the policy to be reported.
2. Then click on [Policy Administration](#)

**Attention:** In case you have more than one policy, please report the sub-policies first followed by the main policy.

In case you have a policy with co-insured with no separate premium invoicing, please report the total turnover for all insured companies on the main policy and split the turnover per policy in a separate attachment.

The screenshot shows the EOLIS user interface. At the top, there is a navigation bar with the EOLIS logo and several menu items: Credit Services, Overdue Management, Information Services, and Policy Administration (highlighted with a red box). To the right of the navigation bar is a 'Quick menu' icon. Below the navigation bar, there is a welcome message for 'Test1 Testesen' and a 'Company Search' button (highlighted with a red box). Below the search bar, there is a 'Select a policy' button (highlighted with a red box). The main content area is divided into two sections: 'My bookmarks' and 'Notice board'. The 'My bookmarks' section contains a list of items: Payment incident, Overdue declaration, Credit Limits - Request, and Credit Limits - Cancel request/credit limit. The 'Notice board' section contains the message 'No active messages'. At the bottom of the screenshot, there is a 'Turnover' section with a table showing policy details for 'Testfirma 1 KOB - Insured credit information n° : 013453'.


Turnover		
Policy n° : X013453	Insurance period : 01/01/2016 - 31/12/2016	Currency : DKK

After you have chosen a policy, the next screen will show:

1. Type of policy
2. Insured countries
3. Insured period
4. Currency

## DECLARATION OF TURNOVER (CONTINUED)

### Manual registration

1. Enter insurance period to be reported from the calendar box  or in format DD/MM/YYYY
2. Enter the turnover in the boxes for each country

**Attention:** It is not possible to report before the insurance period has ended.

Policy n° : X013453 Insurance period : 01/01/2016 - 31/12/2016 Currency : DKK

Upload :

**Step 1 : Upload a file :**  
 You can automatically create your declaration with a macro by clicking on Create a file below. You'll be able to create your TOD file and upload it on step 2. If you do it, you'll not have to fill the inputs below.  
 Please be aware that if you create a file using the link on the right, you must Save the file before opening it.


**Step 2 : Upload a file :**  
 Click on the  button and select your file. File :

**Manually :**

Declaration period :

Turnover amount :  VAT according to policy terms

Countries	Turnover amount :
AUSTRIA	<input type="text" value="100000"/>
AUSTRALIA	<input type="text" value="335000"/>
BOSNIA-HERZEGOVINA	<input type="text" value="1000000"/>
BELGIUM	<input type="text" value="45000"/>
BULGARIA	<input type="text" value=""/>


**Create a file** 

In cases additional information is needed to be sent to Euler Hermes, please use the browse bottom at the end of the screen shown in the picture below, and attach the document you want to send.

Press [Attach](#) and then [Continue](#).

**Attachments**

File path :

**Attach** 

No documents currently attached.

## DECLARATION OF TURNOVER (CONTINUED)

After you have pressed **Continue** the below screen will show. Here you see an overview of the figures you are about to report.

If accurate, press **Continue** and the declaration will be sent to Euler Hermes.

**Turnover**
Testfirma 1 KOB - Insured credit information n° : 013453

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Policy n° : X013453
Insurance period : 01/01/2016 - 31/12/2016
Currency : DKK

Declaration period : 01/01/2015 - 31/12/2015

Turnover amount : 1480000.00

Countries	Turnover amount :
AUSTRIA	100000.00
AUSTRALIA	335000.00
BOSNIA-HERZEGOVINA	1000000.00
BELGIUM	45000.00

**Attachments**

---

Document name	Attachment date
Præmieindberetning skema.xlsx	17/11/2016 00:00:00

**Back** 
**Continue**

The declaration is now sent to Euler Hermes and you receive a final confirmation.

**Turnover**
Testfirma 1 KOB - Insured credit information n° : 013453

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**Your declaration has been sent to Euler Hermes**

Policy n° : X013453
Insurance period : 01/01/2016 - 31/12/2016
Currency : DKK

Declaration period : 01/01/2015 - 31/12/2015

Turnover amount : 1480000.00

Countries	Turnover amount :
AUSTRIA	100000.00
AUSTRALIA	335000.00
BOSNIA-HERZEGOVINA	1000000.00
BELGIUM	45000.00

**Attachments**

---

Document name	Attachment date
Præmieindberetning skema.xlsx	17/11/2016 00:00:00

**Print**