



Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

- Managing Contact and Company Information
 - Contact Registration
 - Company Registration
 - Add Contacts To Company
 - Password Reset
 - Edit Contact Information
 - Edit Company Information
- New Product
- New Formulation
- Submitting and Responding To A Formulation Request
 - Submitting Formulation Request (Marketer)
 - Responding To Formulation Request (Supplier)
 - Receiving A Response To Formulation Request (And Submitting To API For Review)
- Associating Formulations To A Product
 - Associating An Existing Formulation
 - Associating A New Formulation
 - Associating A Formulation From A Supplier
- Application Fee Invoice/Payment (New Company)
- License Renewal
- AMAP (Audits)
- Product and Formulation Statuses
 - Product Statuses
 - Formulation Statuses





Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Managing Contact and Company Information

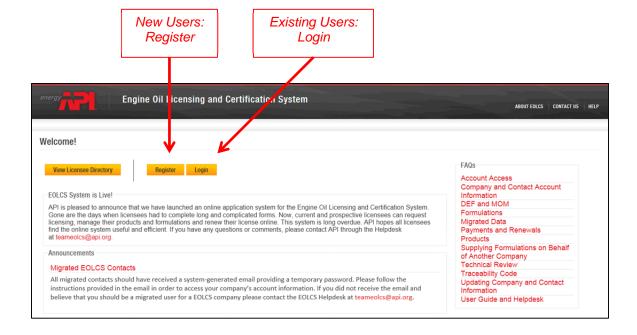






Contact Registration

A user must register in the system before they can create a new company or be added to an existing company's contact list.



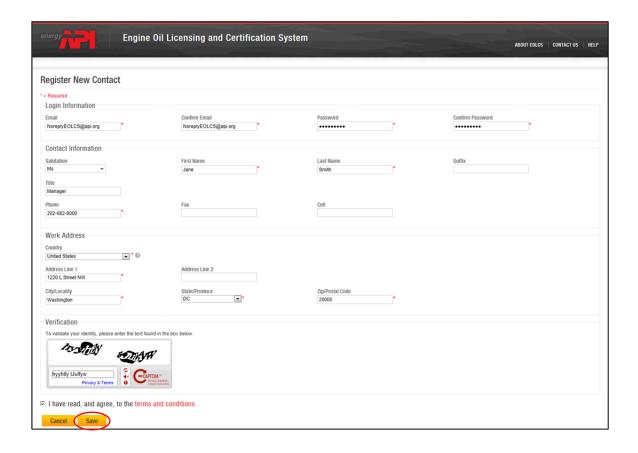


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Required fields are marked with an asterisk (*) and must be filled in before information can be saved.

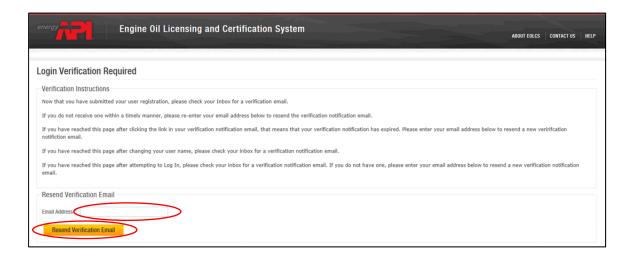




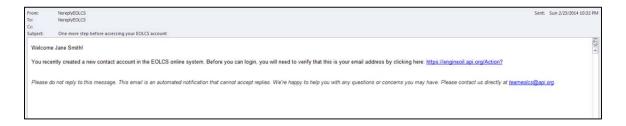
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After registering your contact information, you will be required to verify your email address. A verification email will be sent to the email address used to register. If you do not receive the email within 24 hours, log in to return to the Login Verification Required page and resend the verification email.



Example of verification email:



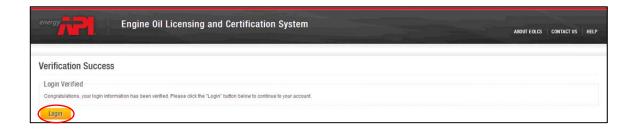


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Once you've verified your email address you will be able to log on to the system and either add a new company or have the primary contact from an existing company add you to the company contact list.









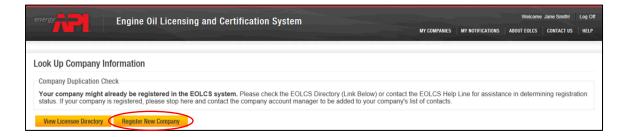


Company Registration

DO NOT create a company account if your company is already registered in the system. If your company has an active EOLCS license, a company account already exists.

The public directory (https://engineoil.api.org/Directory/EolcsSearch) provides a list of active EOLCS licensed companies. If you are not sure if your company is already registered please contact the EOLCS helpdesk at teameolcs@api.org for assistance.

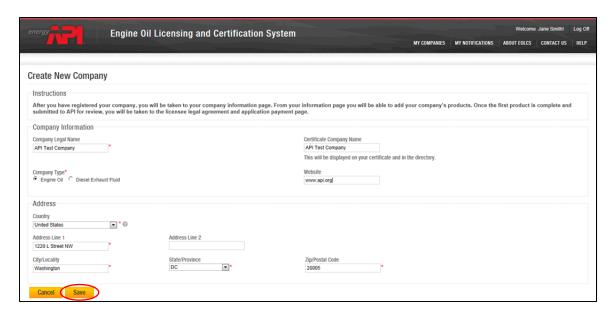


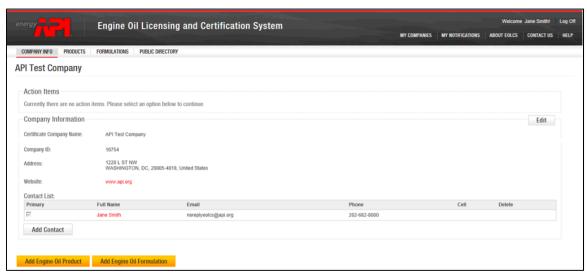




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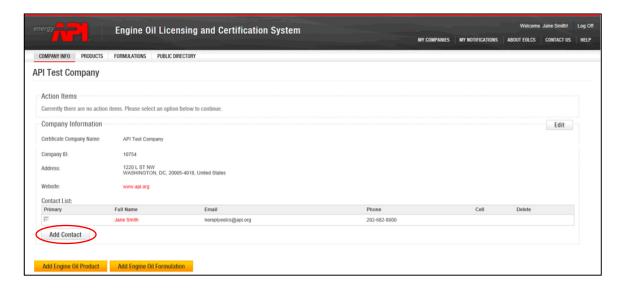


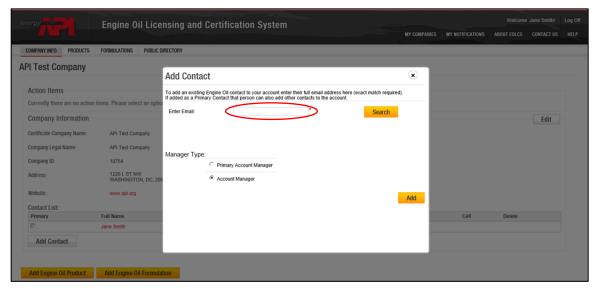




Add Contacts to Company

The Company Info page is the first page you will be directed to when you register a new company or log into your existing company account.

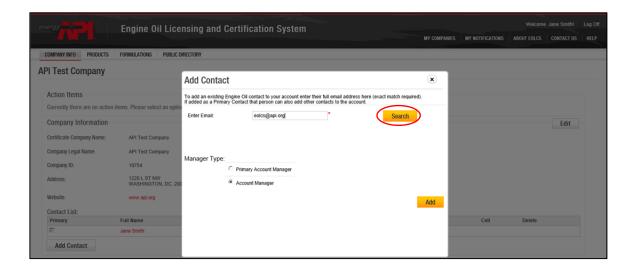


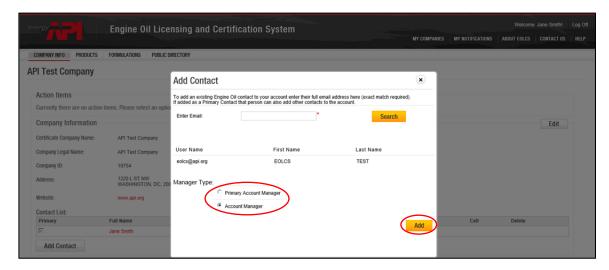


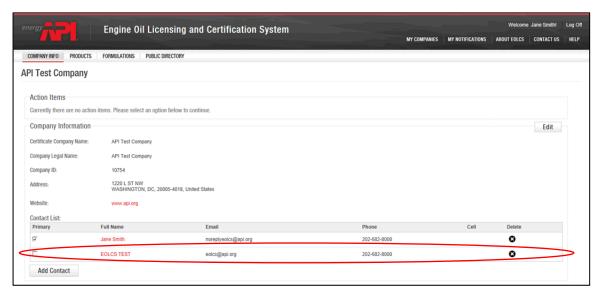


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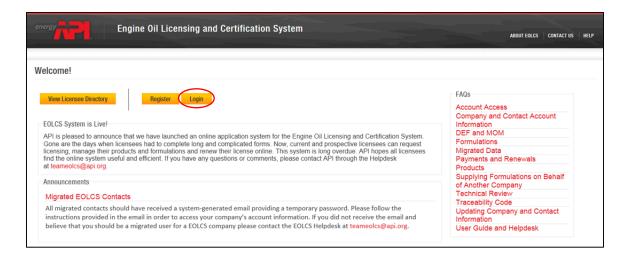


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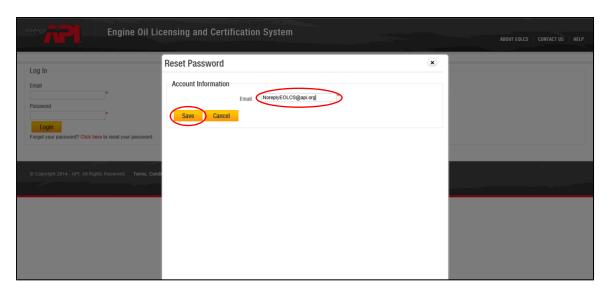




Password Reset







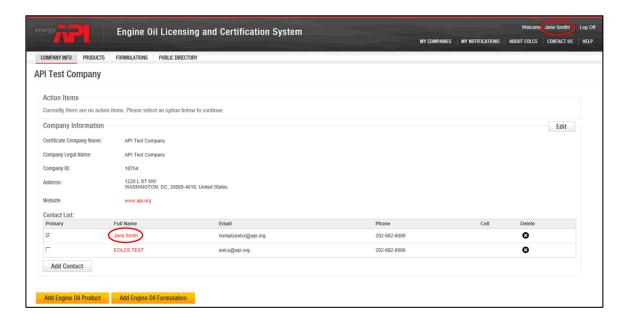
An email will be sent to you containing a temporary password. Once this email is received, log in to your account using the temporary password and update your password immediately.

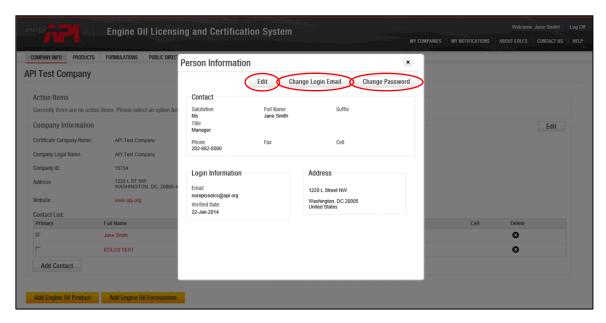




Edit Contact Information

In the Person Information section, you can: update contact information, change your login email and/or change your password.



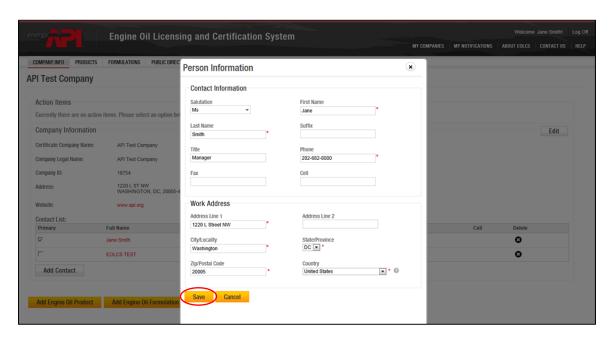




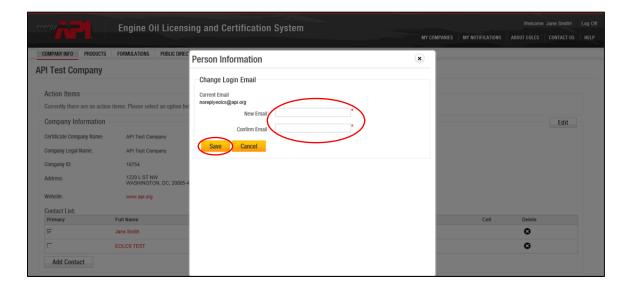
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Edit:



Change Login Email:



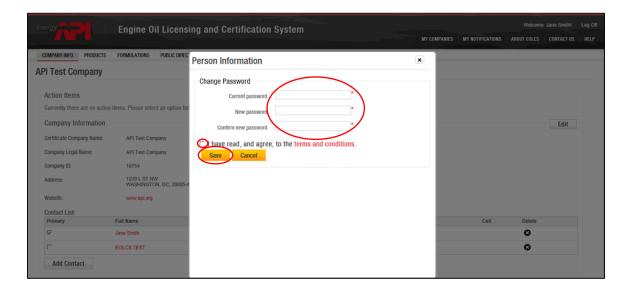


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Change Password:

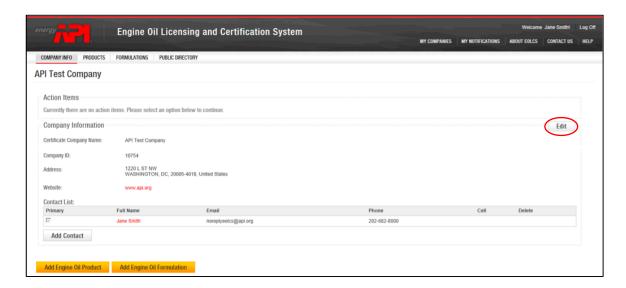


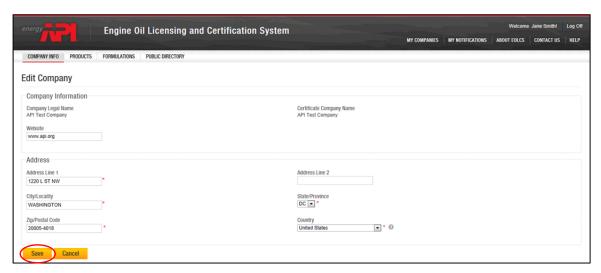
Reminder: Passwords must be at least 8 characters long and contain at least one letter, one number, and one special character.





Edit Company Information







Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

New Product



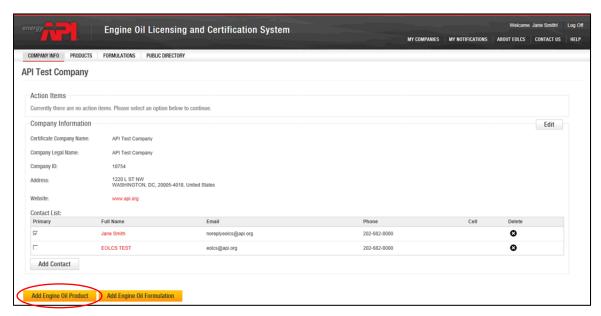
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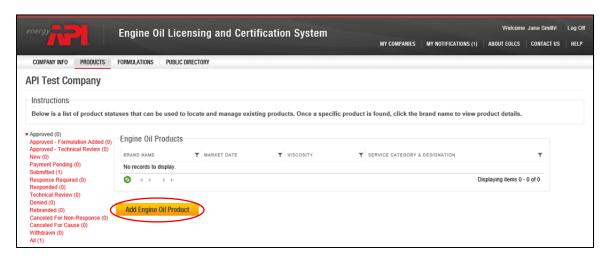


Adding A New Product

There are two places where you can go to enter a new product: the Company Info page and your company's Products tab.





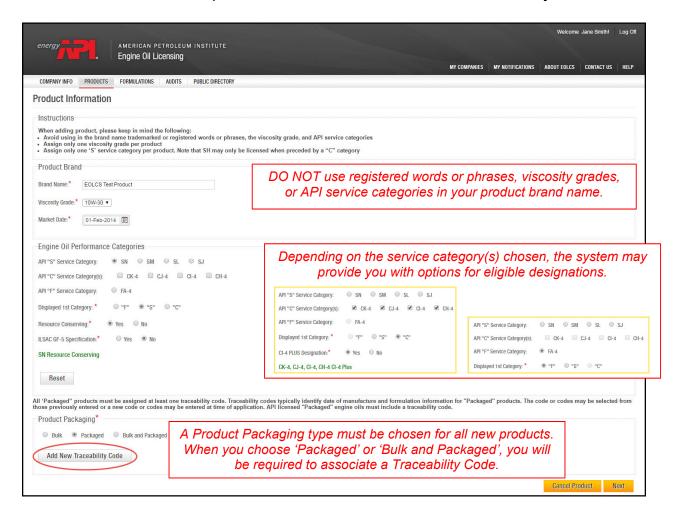




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Once you create a product, you cannot change the brand name, viscosity grade, or service categories. If you discover minor typos in the brand name, contact the EOLCS helpdesk and API will make corrections on your behalf.

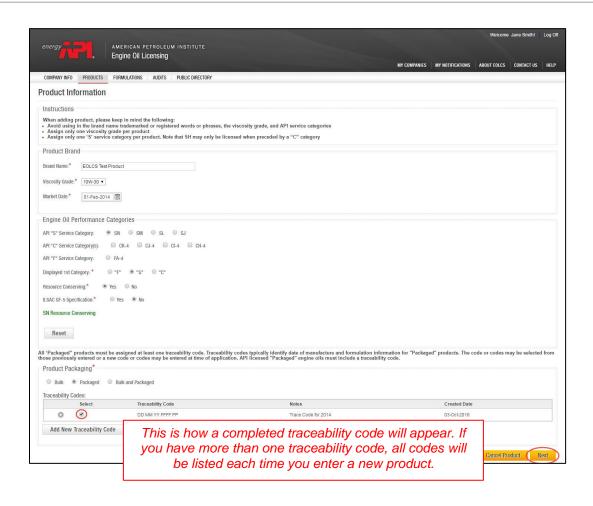




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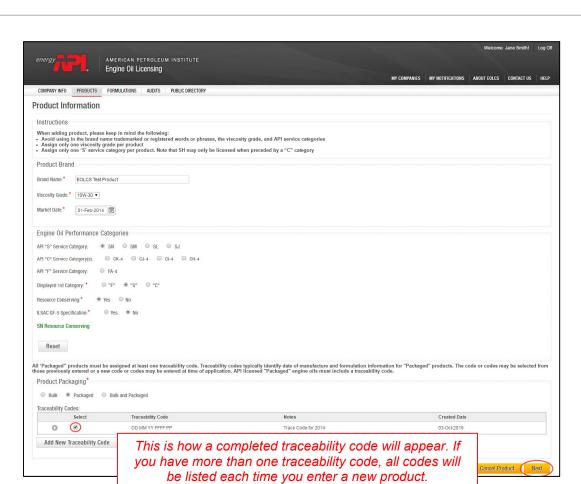






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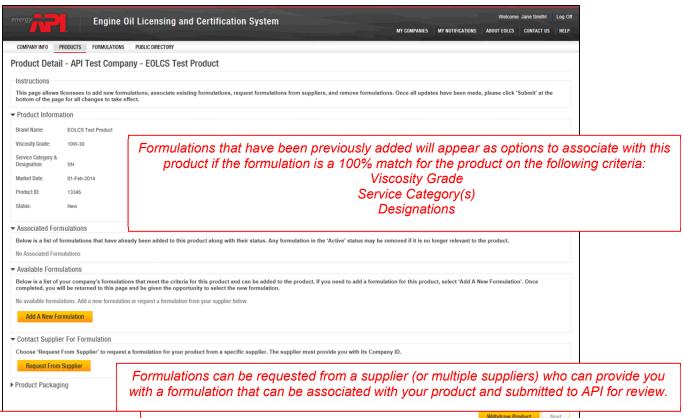






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At any time, product packaging can be changed for a product and new traceability codes can be added.

You have now added a new product. A formulation must be associated with the product before you can submit to API for approval. Until a formulation is associated and the product is submitted, the product can be found in the 'New' status on your Products tab and will be listed under 'New (unfinished) Products:' on the Action Item list on your Company Info page.

From the Product Detail page you can:

- Associate already existing formulations to the product
- Add a new formulation
- Send a formulation request to a supplier
- Edit your product packaging

Please see user guide for Associating Formulations to A Product.





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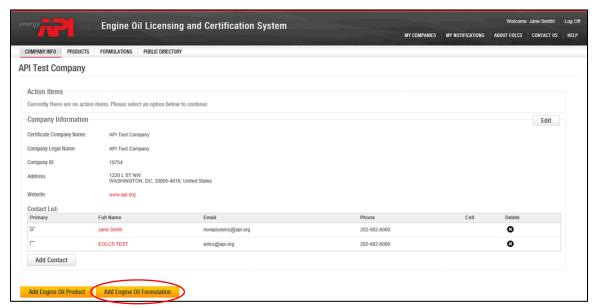
New Formulation



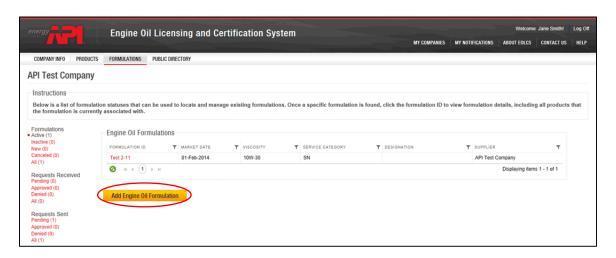


Adding A New Formulation

There are two places where you can go to enter a new formulation: the Company Info page and your company's Formulations tab.







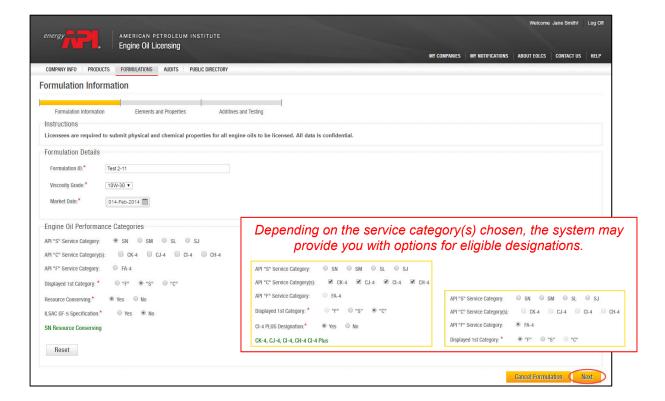


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Adding a new formulation requires completing three pages of information: Formulation Information, Elements and Properties, and Additives and Testing.

Page 1: Formulation Information



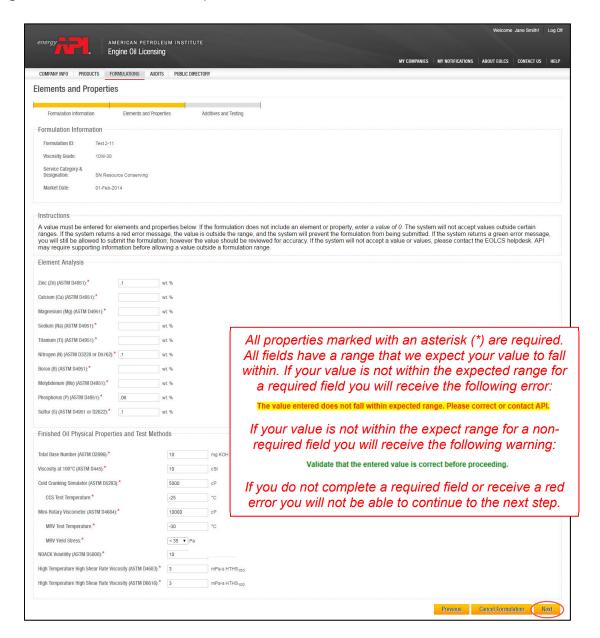


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Page 2: Elements and Properties

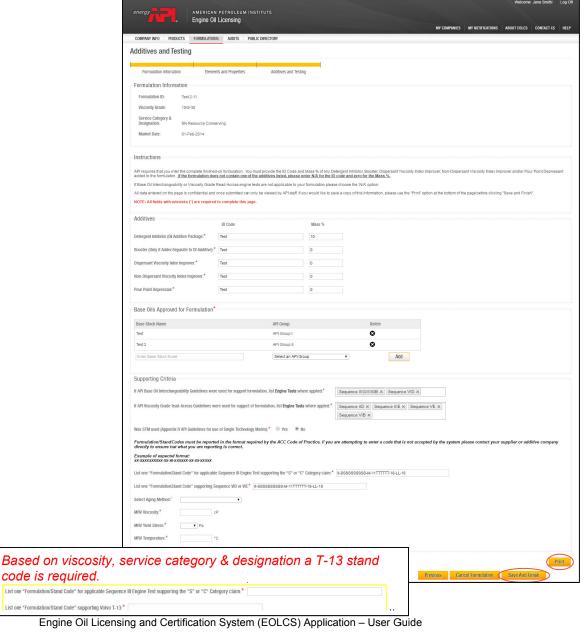






Page 3: Additives and Testing

The information on this page is proprietary and requires additional levels of security. Consequently, API cannot at this time allow licensees to access the data once submitted. Once 'Save and Finish' is chosen, this information will be put into a secure system and will only be viewable by API staff. If you need to retain a copy, use the 'Print' button at the bottom of the page. This will allow you to print or save a copy of the entire formulation before submission.



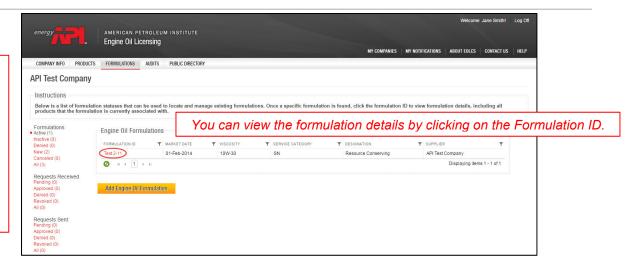
5



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Completed formulations will be listed under the Active status on your company's Formulation tab and will be available for use on products.











Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Submitting & Responding To A Formulation Request

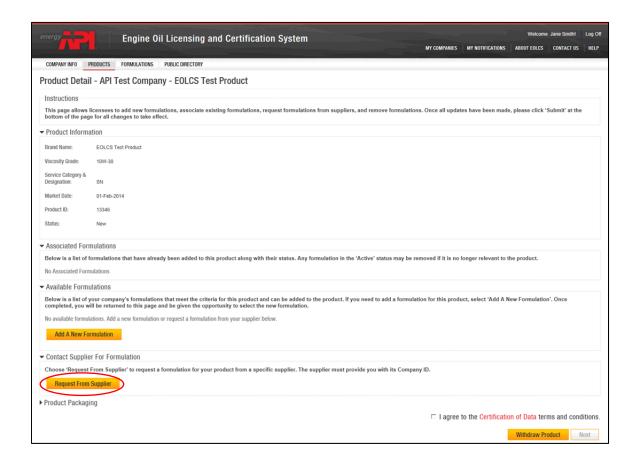




Submitting A Formulation Request (Marketer)

Once you enter a complete product, you will have the option to submit a Formulation Request to a supplier or multiple suppliers. This will allow a supplier to provide you with a formulation, which can then be associated with your product and submitted to API for review. In order to submit a Formulation Request you will need to know your supplier's 5-digit Company ID number, this number can be found on the Company Info page.

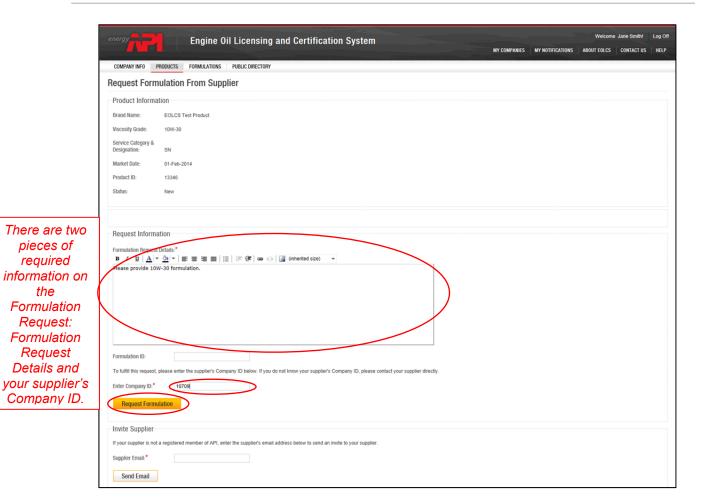
A Formulation Request can be sent from the Product Detail page.





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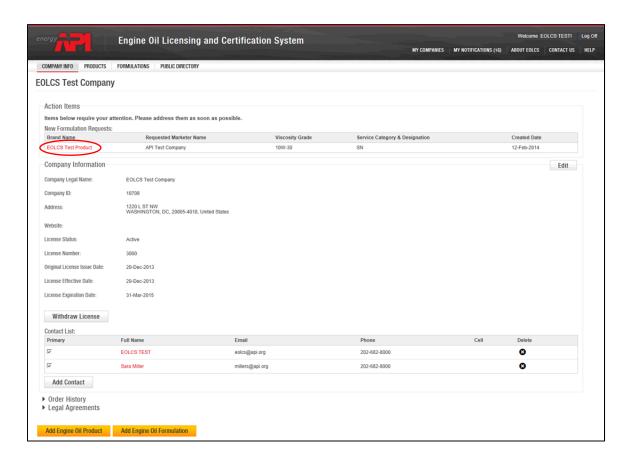


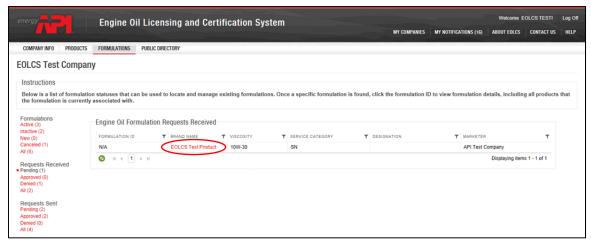
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Responding To Formulation Request (Supplier)

When a marketer sends your company a formulation request, you will be notified with an email and the request will appear on your Company Info page and on your company's Formulations tab.







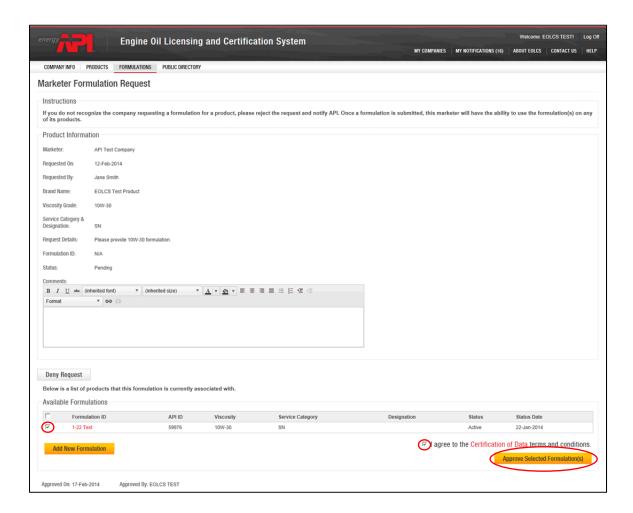
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appear as options to

Formulations that have been previously added will appear as options to supply for a marketing company's formulation request if the formulation is a 100% match for the product on the following criteria:

- Viscosity Grade
- Service Category(s)
- Designations



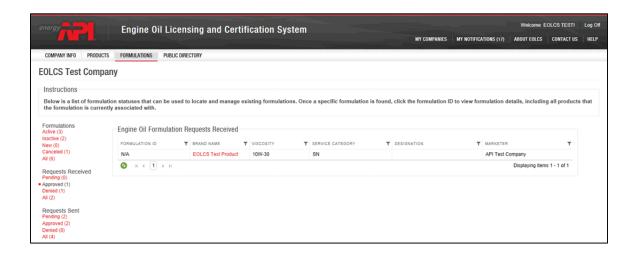


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All received formulation requests can be viewed on your company's Formulation tab. Once you have supplied a formulation, the formulation request status will change from 'Pending' to 'Approved'.

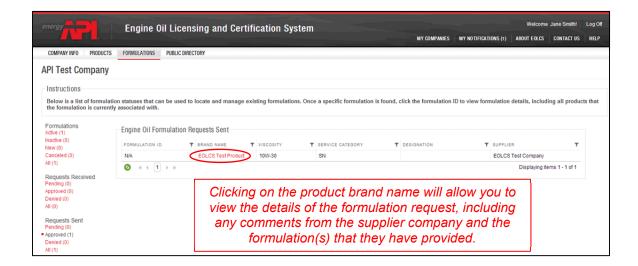






Receiving A Response To Formulation Request (Marketer)

Once a supplier company provides a formulation in response to a formulation request you will be notified with an email and on your company's Formulations tab, these formulation requests will now be listed under the 'Approved' status.



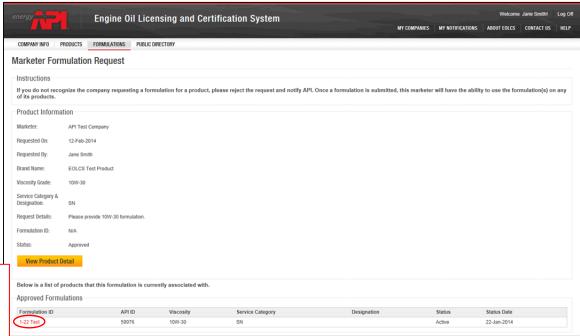


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From the Formulation Request, clicking on 'View Product Detail' will take you to your Product Detail page where you can associate the supplier provided formulations with your product and submit to API for review (see Associating Formulations To A Product).



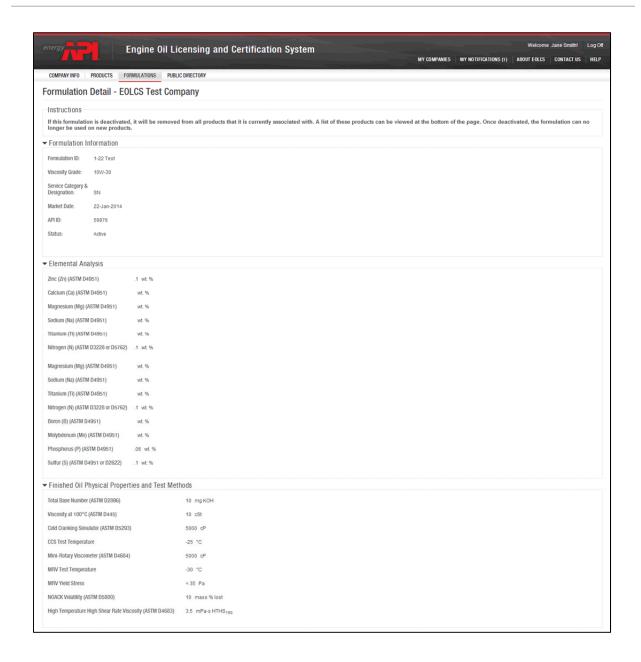
Clicking on the formulation ID of any supplier provided formulations allows you to view details of the formulation.



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Associating Formulations To A Product







After adding a new product, you will be taken to the Product Detail page. You can also get to this page by clicking on the product brand name in the Products tab. New products that do not have any associated formulations will be in the 'New' status and will be listed on the Action Item list on the Company Info page under 'New (unfinished) Products'.

From the Product Detail page you can associate existing formulations, new formulations, and/or supplier provided formulations to the product and submit to API for review.

Formulations can be associated to any products in any status except for Canceled For Non-Response and Canceled For Cause. For products in the Withdrawn status: if a formulation is associated and submitted to API for review, the product will move to the 'Submitted' status and if approved the product will become active.

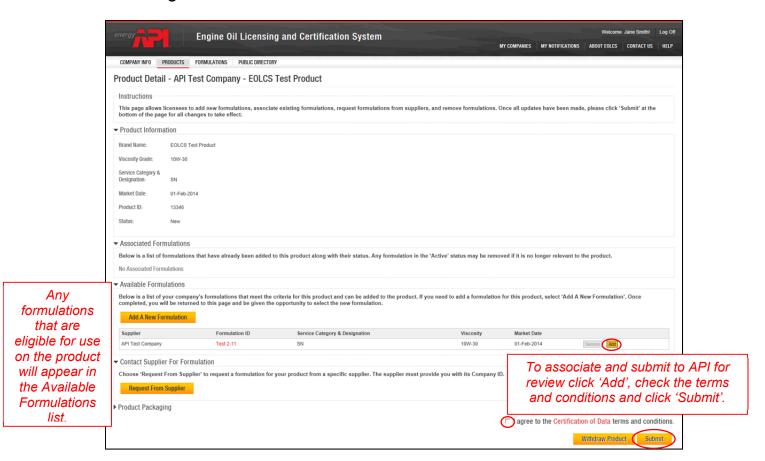




Associating An Existing Formulation

Formulations that have been previously added will appear as options to associate with this product if the formulation is a 100% match for the product on the following criteria:

- Viscosity Grade
- Service Category(s)
- Designations

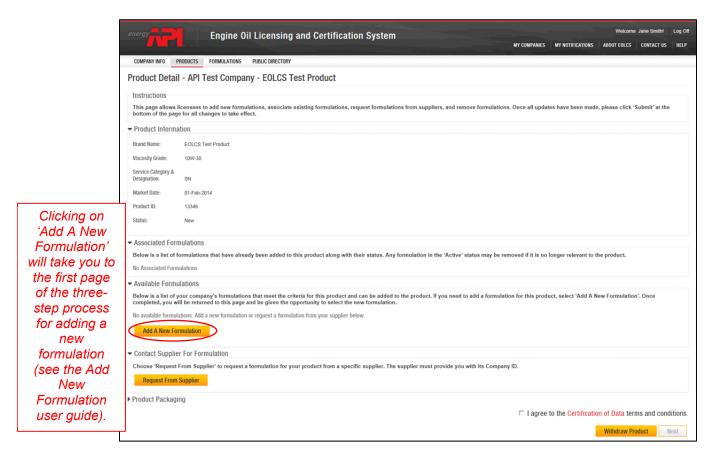








Associating A New Formulation



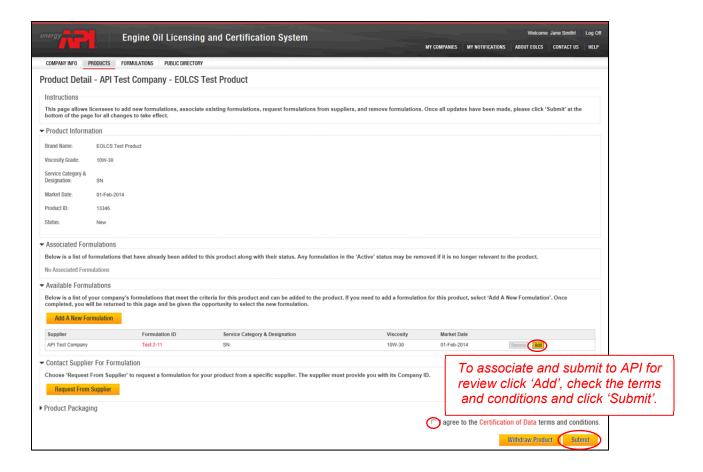


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After adding a new formulation, you will be brought back to the Product Detail page where the formulation you added will be listed under the Available Formulations.

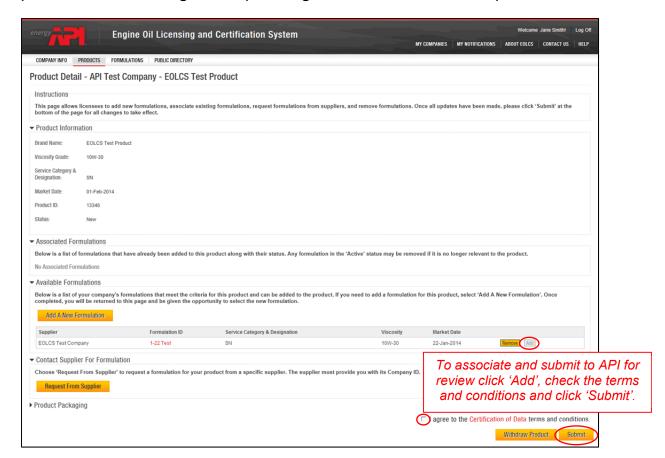






Associating A Formulation From A Supplier

When your supplier provides a formulation for use on your product, on the Product Detail page you will see the supplier submitted formulation under the Available Formulations. For instructions on how to submit a formulation request see Submitting & Responding To A Formulation Request.





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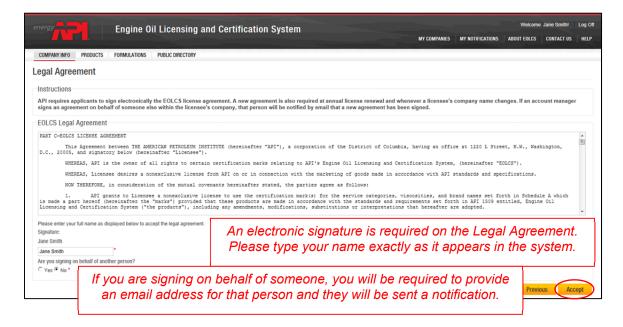
Application Fee – Invoice/Payment New Company





Application Fee Invoice/Payment

In order to ensure program eligibility, any company wishing to be EOLCS licensed must register in the online system and complete at least one product. After you submit the first product to API for review, you will be taken to the Legal Agreement page.



After signing the Legal Agreement, you will begin the process of generating and submitting payment information for the application fee.

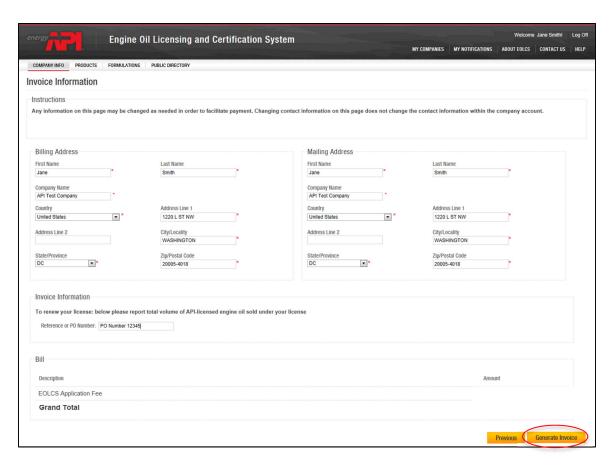


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All new applicants are required to pay an application fee before API can review their products and formulations. Current application fees can be found here.

Any of the information on this page can be changed as necessary in order to facilitate payment.



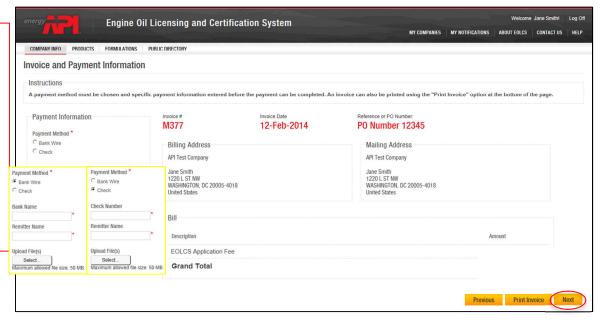


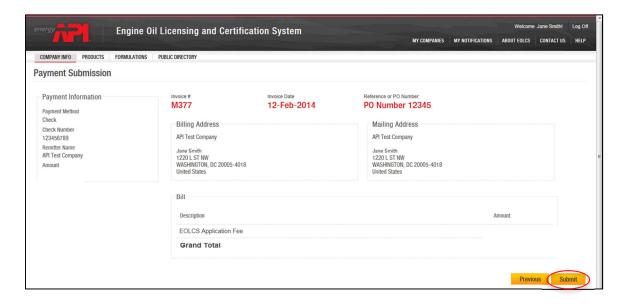




From this page you can print an official invoice (example on next page) and submit your payment information. If you do not have the payment information at the time the invoice is generated, you can leave this page and come back to it when you have the necessary information. However, payment information *must* be completed in order for API to identify your payment when it is received and apply it to the correct invoice.

The two available payment methods are Bank Wire and Check. You will be required to submit information specific to the payment method chosen.







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Payment Status: Payment Pending

Invoice # xxx

Invoice Date

Due Date

Billing Contact:

API Test Company Attn: Jane Smith 1220 L ST NW WASHINGTON, DC 20005-4018 **United States**

Mailing Contact:

API Test Company Attn: Jane Smith 1220 L ST NW WASHINGTON, DC 20005-4018 United States

All payments must be made in United States currency. Checks must be drawn from a U.S. bank. You are responsible for all taxes, banking or other service fees, including all applicable withholding taxes. If you are paying by electronic transfer, please note (1) you are responsible for all electronic transfer, A.C.H. and banking fees; (2) for electronic payments not drawn on a U.S. bank a fifty-dollar (\$50) handling fee must be added at the time payment is made; and (3) you must reference the Invoice # M2 36 a ve. Thank you.

Description Amount

Company ID: 11614 Payment #: 866125

Comments:

If you are paying by be ch A.C.H., you MUS . ..ave you bank include the invoice # M2636 . Thank y a.

Total

Payme of .ecc ved Bail Je Due

Send Checks By Mail To: American Petroleum Institute Courier Services To:

Send Checks By

Send Wire Transfers To:

Send Correspondence To: **EOLCS Program** American Petroleum Institute 1220 L Street NW Washington, D.C. 20005-4070 USA EOLCS@api.org

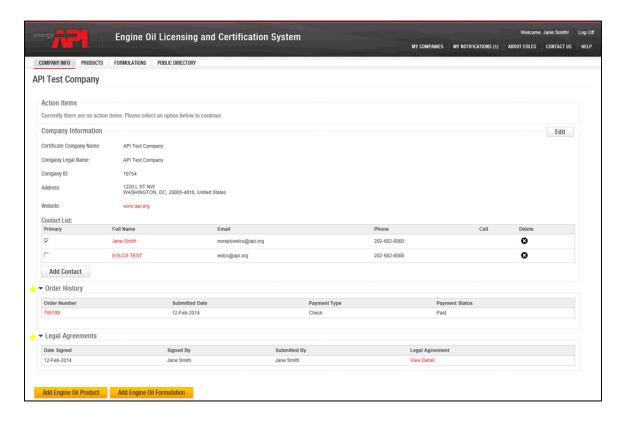
Instructions for sending payment through check and wire transfer will be available on actual invoice.







You will be able to review your company's order history and previously signed legal agreements at any time on the Company Info page.

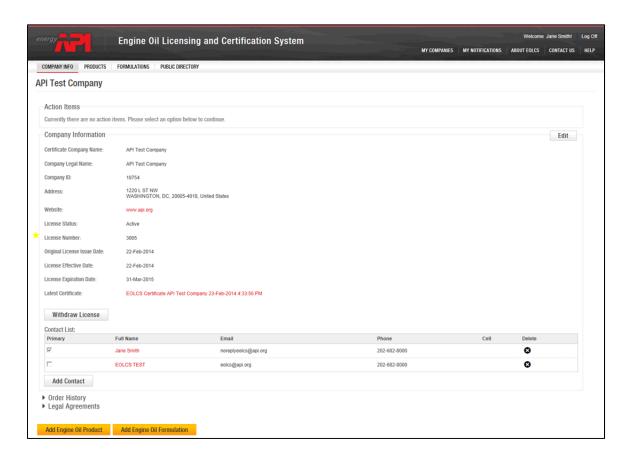








After your application fee is received, API will review your products. If any of your products are approved, you company will be licensed, you will be assigned a license number and your company will appear on the online public directory of licensees.







Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

License Renewal





EOLCS licensees are required to renew their licenses on an annual basis. Below are the key points regarding EOLCS renewals:

- All licenses now have an expiration date of March 31st. Each year you
 must renew your license by March 31st or your license will expire and
 no longer be listed on the public directory of licensees.
- You will be required to renew through the online system.
- All licensees will be required to sign a legal agreement each year prior to renewal.
- You will be asked to report the amount of API licensed motor oil sold (volume of sales) for the last full calendar year. The calendar year is defined as the one-year period that begins on January 1 and ends on December 31.
- Once volume is reported, an invoice will be generated for the annual renewal fee and the volume of sales fee per gallon for every gallon after the first million. Those reporting less than 1 million gallons of license oil will only be invoiced for the annual renewal fee. Current EOLCS Renewal fees can be found here.

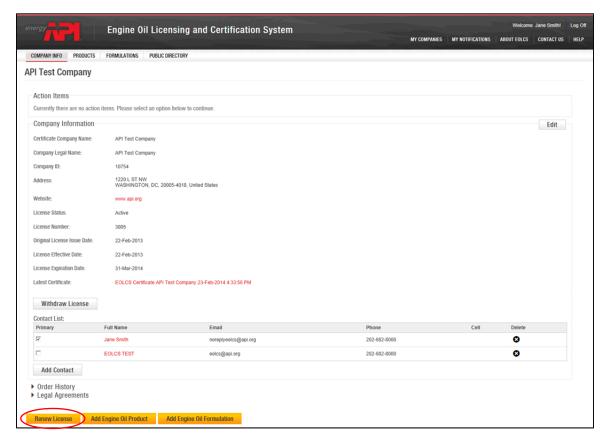


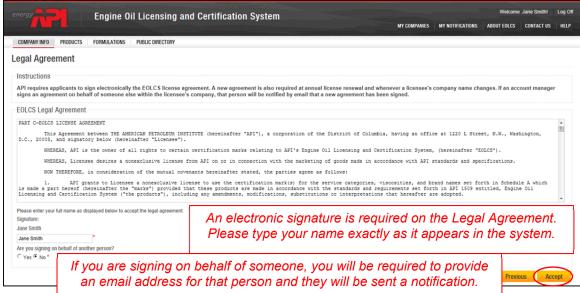




Renewing A License

The option to renew will be available to all licensees beginning January 1.



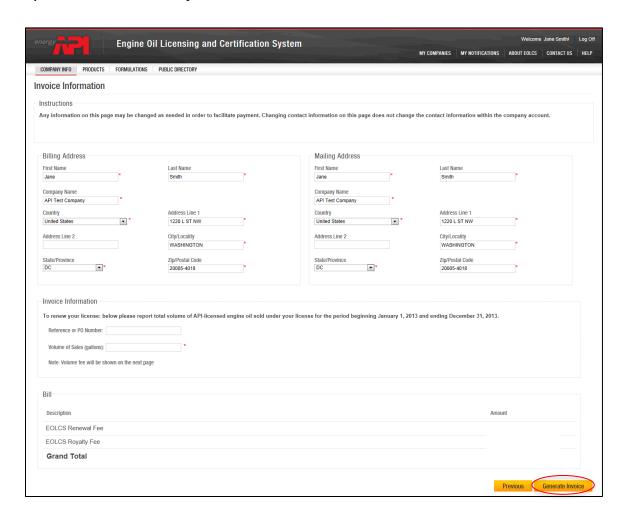








After completing the legal agreement you will be taken to the Invoice Information page where you will be asked to report your volume of sales for the previous calendar year.



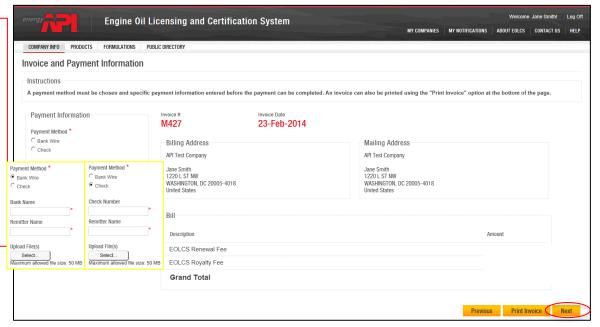


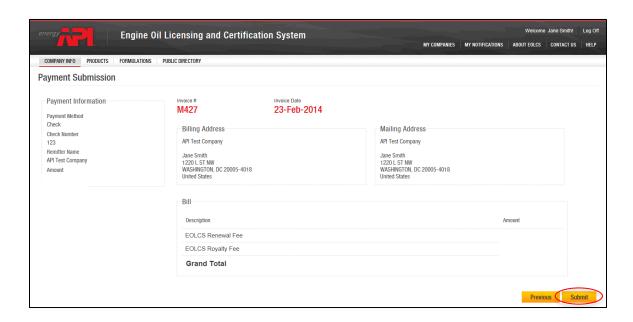
AMERICAN PETROLEUM INSTITUTE $\mathbf{FOLCS}^{\mathsf{m}}$



From this page you can print an official invoice (example on next page) and submit your payment information. If you do not have the payment information at the time the invoice is generated you can leave this page and come back to it when you have the necessary information. However, payment information *must* be completed in order for API to identify your payment when it is received and apply it to the correct invoice.

The two available payment methods are Bank Wire and Check. You will be required to submit information specific to the payment method chosen.





License Renewal



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Payment Status: Payment Pending

Invoice # xxxx

Invoice Date

Due Date

Billing Contact:

API Test Company Attn: Jane Smith 1220 L ST NW WASHINGTON, DC 20005-4018 **United States**

Mailing Contact:

API Test Company Attn: Jane Smith 1220 L ST NW WASHINGTON, DC 20005-4018 United States

All payments must be made in United States currency. Checks must be drawn from a U.S. bank. You are responsible for all taxes, banking or other service fees, including all applicable withholding taxes. If you are paying by electronic transfer, please note (1) you are responsible for all electronic transfer, A.C.H. and banking fees; (2) for electronic payments not drawn on a U.S. bank a fifty-dollar (\$50) handling fee must be added at the time payment is made; and (3) you must reference the Invoice # M2 o a ve. Thank you.

Description Amount

Company ID: 11614 Payment #: 866125

Comments:

If you are payin by bar' 'ect 'e' transfer or A.C.H., you MU. we you bank include the invoice # M2636 . Thank y ...

Total

Payment Face ved

B. mr. Due

Send Checks By Mail To: American Petroleum Institute Courier Services To:

Send Checks By

Send Wire Transfers To: TD Bank

Instructions for sending payment through check and wire transfer will be available on actual invoice.

Send Correspondence To: EOLCS Program American Petroleum Institute 1220 L Street NW Washington, D.C. 20005-4070 USA Email: EOLCS@api.org

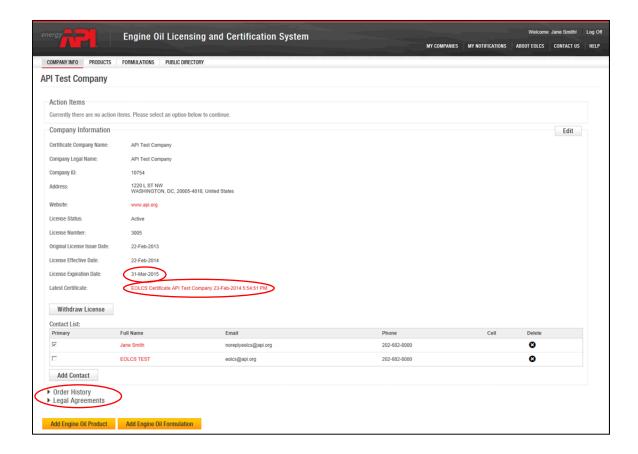






You will be able to review your company's order history and previously signed legal agreements at any time on the Company Info page.

Once your company's renewal fee is received your expiration date will automatically update. Additionally, from your Company Info page you will be able to print a copy of your company's updated EOLCS certificate.









Example certificate:



License No: 3005

SCHEDULE A - LICENSE AGREEMENT

The marks referred to and licensed under the Agreement between API and API TEST COMPANY

for the period beginning 22-Feb-2014 and ending 31-Mar-2015 are as follows:

API SERVICE SYMBOL
Licensee is authorized to display the API Certification Mark on the following products:

APISERVICE PEROLINCE CONSER

BRAND NAME

SAE VISCOSITY

SEP .CE L TEGORY

PERFORMANCE DESIGNATION

EOLCS TEST PRODUCT

10VV-30

Engine Oil Licensing and Certification System
1220 L Street, NW • Washington, DC 20005-4070 • USA • www.api.org/eolcs
Copyright 2013 - American Petroleum Institute, at inflatmentary AP, the API length Certification Mark ("Statutust"), and the API Service
Symbol' ("Divid") are either tooleumaks or registered transmissed of API in the United States and/or other contries. 2013/1991 [bigsla

EOLCS Manager of Operations Date: 22-Feb-2013





Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

After Market Audit Program (AMAP)





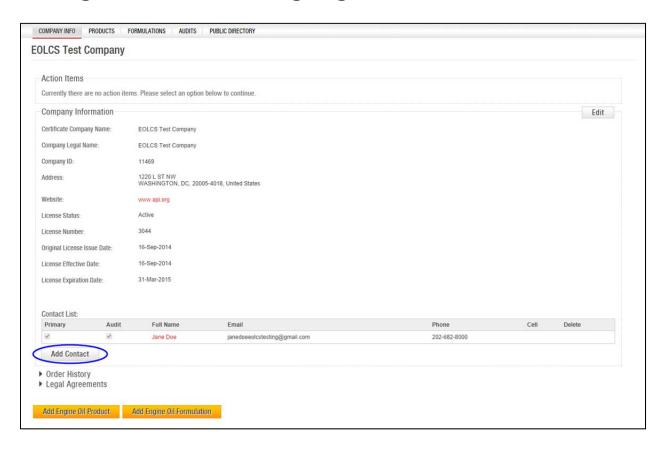


Audit Role

The Audit role allows contacts to view results of audits performed on the company's products. These contacts will: receive audit notifications, have access to the 'Audits' tab when logged into the EOLCS online system, and view audit related action items on the Company Info screen. There are three options for assigning contact roles:

	Manage License Information	Add/Manage Contacts	View/Respond to Audits
Primary Contact	\checkmark	\checkmark	✓
Account Manager (with Audit Manager option)	✓	X	✓
Account Manager		×	×

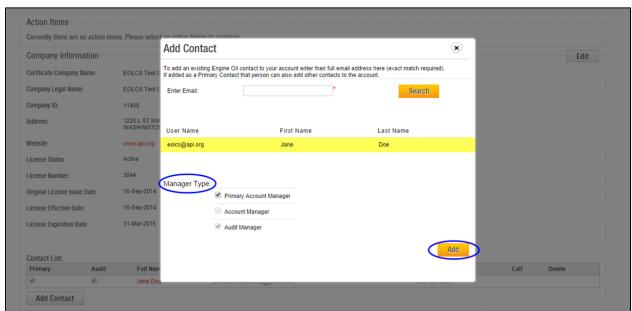
Adding a Contact and Assigning Roles:







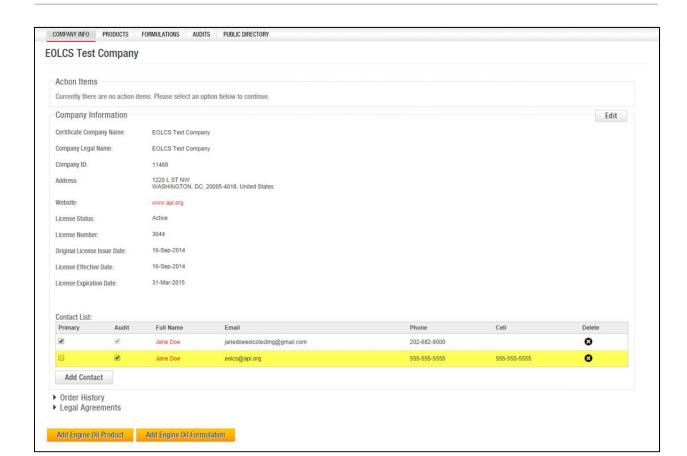






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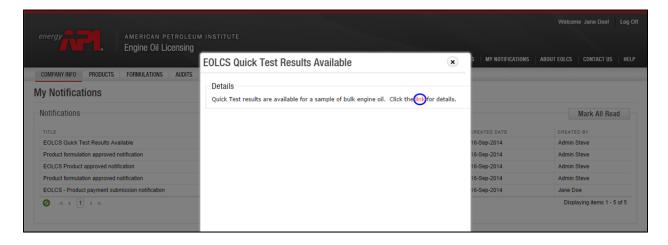
Quick Tests

API performs quick tests on engine oil drawn from bulk tanks (for example, those found in oil-change locations and auto dealerships). These results are conducted by API and provided to licensees as an initial assessment of the quality of a bulk product sampled. API reviews the quick test results but does not take action against nonconformances until final audit tests have been completed and evaluated. However, licensees should take a moment to review the quick test results and consider taking action if they fall well outside expected parameters for the product tested.

When Quick Test results are available, company contacts assigned to the audit role will receive an email notification and a notification within the system. Both will include a link to the Quick Test results.

Quick Test Notification:





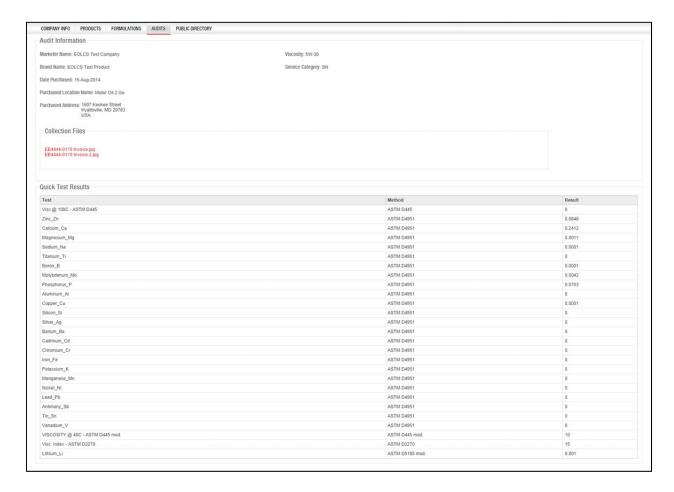


american petroleum institute $EOLCS^{^{\mathrm{IM}}}$





Example of Quick Test Results:



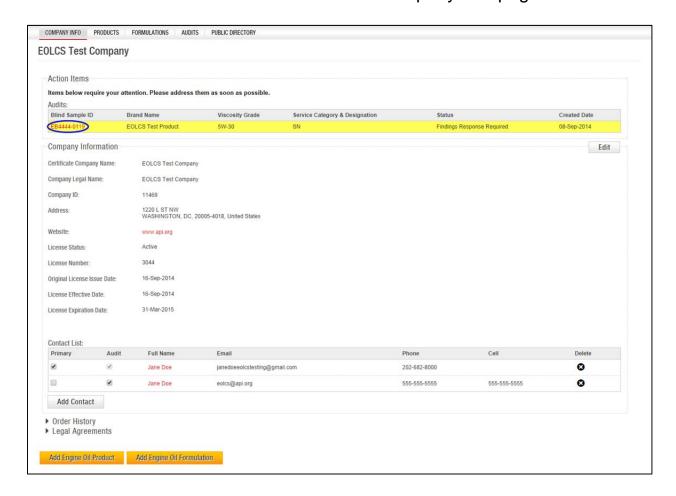


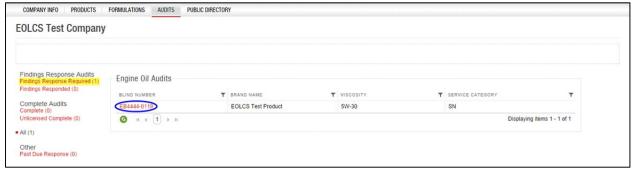




Audit Findings

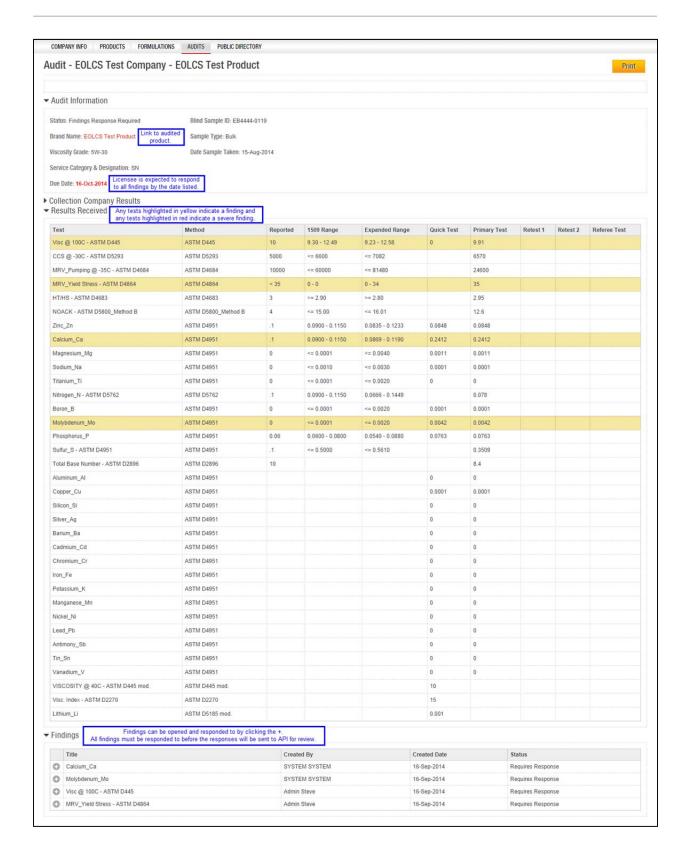
When an audit is performed on a product and findings are discovered, the company is required to review and respond to the findings within a certain time period (varies depending on the severity of the findings). Company contacts assigned to the audit role will receive an email notification and there will be an action item created on the Company Info page.

















Collection Company Results:

On the Audit page, the Collection Company Results section can be expanded to provide additional information regarding the product sample that was audited. This includes information such as where and when the product was collected. For packaged product, this section will also include information regarding the certification symbol(s) and traceability code(s). The 'Collection Files' section will also include links to images associated with the audit, such as receipts, collection forms and label images (for packaged products).



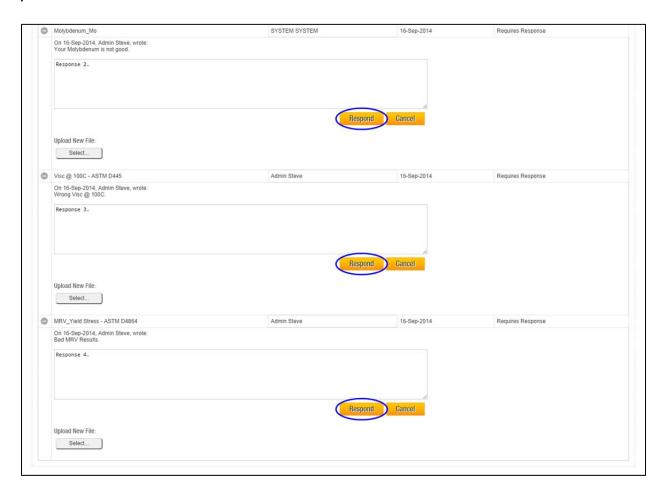




Responding to Findings:

Each finding must be responded to individually. Under each finding there is a text box available for a written response and there is also an option to upload files. Once all findings have been responded to, the audit status will change to Findings Responded and the responses will be sent to API for review. If the responses resolve all the findings, the audit will be closed, if not the findings will be returned for further information.

If audit findings are not responded to within the specified time period, the product will be Canceled for Non-Response. When a product has been canceled, the product will be listed as Canceled on the public directory and the licensee will no longer be able to claim EOLCS certification on that product.









Complete Audit

An audit will be put into the Complete status if no findings are found or all findings are resolved by the licensee. When an audit is completed, company contacts assigned to the audit role will receive a notification and the audit will be available to view in the company's Audits tab.







Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Product and Formulation Statuses





Product Statuses

Status Title	Description
Approved	Approved by API and listed on the licensee
	directory.
Approved – Formulation Added	New formulation is added to an Approved product and submitted to API for review.
	A new formulation that was added to an Approved
Approved – Technical Review	product is in API technical review.
New	Incomplete product that has not been submitted to API for review. These products will be listed on the Action Item list on the Company Info page under 'New (unfinished) Products'.
Payment Pending	Product submitted for an unlicensed company that API has not received an application fee from. Products will not be reviewed for new applicant companies until the application fee invoice has been paid.
Submitted	Complete product that has been submitted to API for review.
Response Required	API requires a response to a specific question about the product and/or associated formulation. API's question(s) can be found on the Product Detail page where you have the ability to submit a response. These requests will be listed on the Action Item list on the Company Info page under 'Response Required'.
Responded	Response to API inquiry has been submitted and is pending review.
Technical Review	API is more closely reviewing the product's associated formulation(s). These products may require additional time to review.
Rebranded	Product has been rebranded and submitted to API and is pending review.
Canceled For Non-Response	Canceled by API for audit nonconformance(s) that were not addressed.
Canceled For Cause	Canceled by API for severe audit failure.
Withdrawn	Product was either voluntarily withdrawn or the only associated formulation was inactivated. These products can be reactivated by associating a
	formulation and submitted to API for review.





Formulation Statuses

Status Title	Description
Active	Complete formulation that can be associated with
Active	products.
	Voluntarily withdrawn or denied by API during
	product review. If formulation was inactivated
Inactive	because of API denial, reason for denial will be
	provided on the Formulation Detail page. Inactive
	formulations cannot be associated with products.
	Incomplete formulation. These formulations will be
New	listed on the Action Item list on the Company Info
	page under 'New (unfinished) Formulations'.
Canceled	Canceled by API for audit failure.

Requests Received

(formulation requests received from marketing companies)

Status Title	Description
Pending	Pending review from your company.
Approved	Your company has approved and provided a formulation for.
Denied	Your company has denied. Any formulation requests from companies you do not recognize should be denied and reported to API.
Revoked	Request your company originally approved but then revoked.

Requests Sent

(formulation requests sent to supplier companies)

Status Title	Description
Pending	Your company sent and is still waiting for action from the supplier.
Approved	Supplier company approved and proved a formulation for.
Denied	Denied by your supplier company. For questions regarding why your request was denied please contact your supplier directly.
Revoked	Request supplier originally approved but then revoked.