



**招商銀行** 紐約分行  
CHINA MERCHANTS BANK New York Branch

# **Customer Information Center**

## **User Manual**

**China Merchants Bank New York Branch**

**April, 2017**

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## 1. Overview of Customer Information Center

Welcome to use Customer Information Center!

This user manual aims to help customers to understand all functionalities and guide customers to use the Customer Information Center.

Please read this user manual carefully before use.

### 1.1 Who Should Read this Manual?

This user manual is prepared for those who will view, download, or print Deal Slip, Monthly Statement, or other business notices through Customer Information Center.

### 1.2 What Should Customer Know About Customer Information Center?

Customer Information Center is provided for customers to view, download, and print Deal Slip, Monthly Statement and other business notices online. Customers can use Customer Information Center service 24/7.

All documentations in Customer Information Center are in PDF format for the previous 13 months. Documentations older than 13 months will be removed from the Customer Information Center.

For new customers, please access online Customer Information Center 24 hours after receiving the first Account Opening Advice. For customers who recently closed all accounts with China Merchants Bank New York (CMBNY), customers are still allowed to access Customer Information Center for two months from the most recent account closing date.

## 2. Website Requirement and Settings

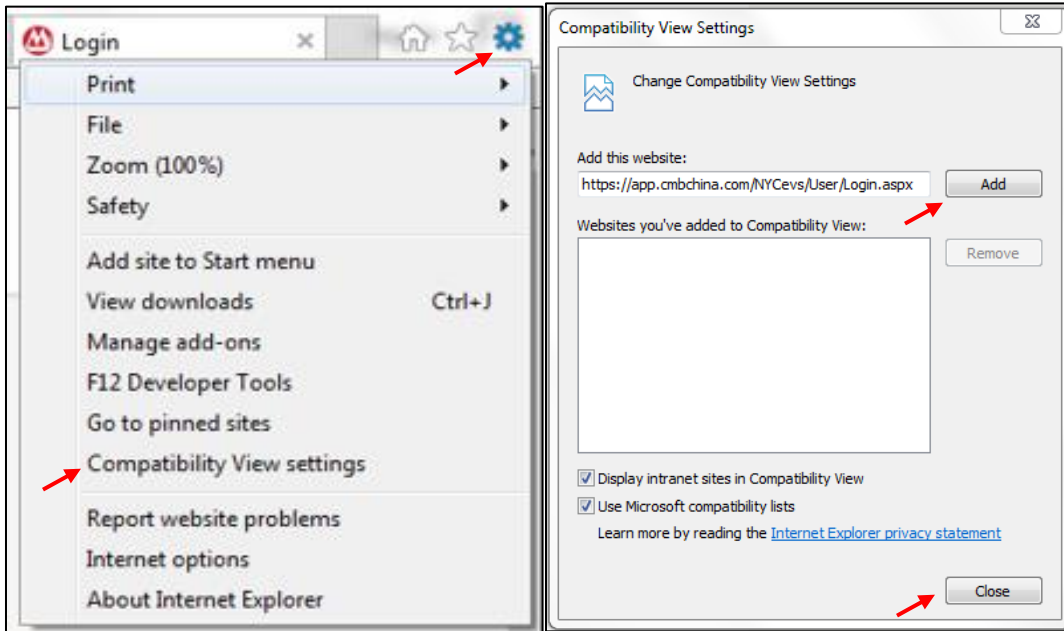
Customer can access the Customer Information Center by clicking the icon in the lower right corner of our website at <https://ny.cmbchina.com> or use the following link directly: <https://app.cmbchina.com/NYCevs/User/Login.aspx>.

Customer Information Center is compatible with Internet Explorer 8, 9, 10, 11.

If your IE browser is 64 bit and you are unable to enter the text into input fields, please enable Compatibility View.

### Instructions:

- 1) On the Login Page, go to **Tools** in the upper right corner of the browser.
- 2) Click **Compatibility View Settings**.
- 3) Add the current address to **Compatibility View**.
- 4) Click **Close**.

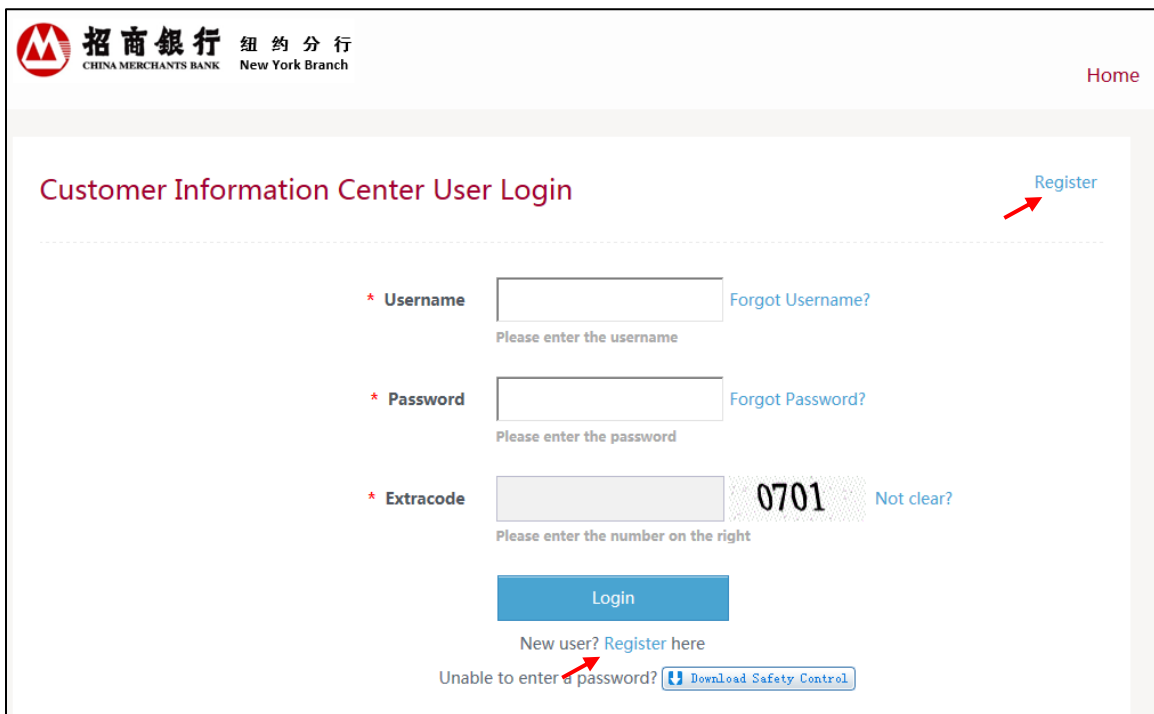


### 3. Register

When you access Customer Information Center for the first time, you need to register and create a username and password.

#### Instructions:

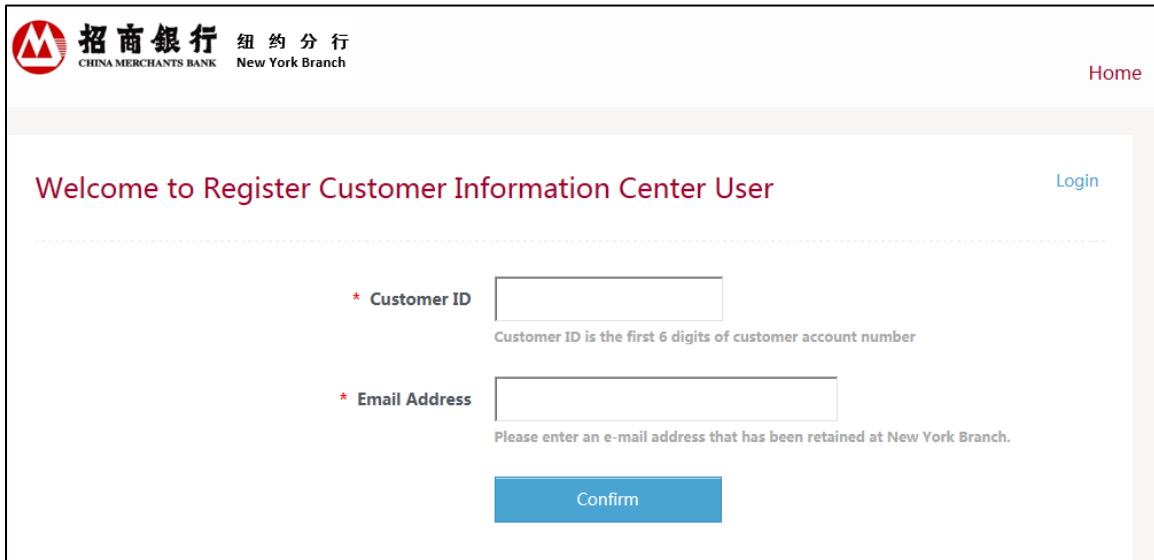
- 1) Click [Register](#) in the upper right corner or on the bottom of the Login Page, then you will be presented with the Registration Page.



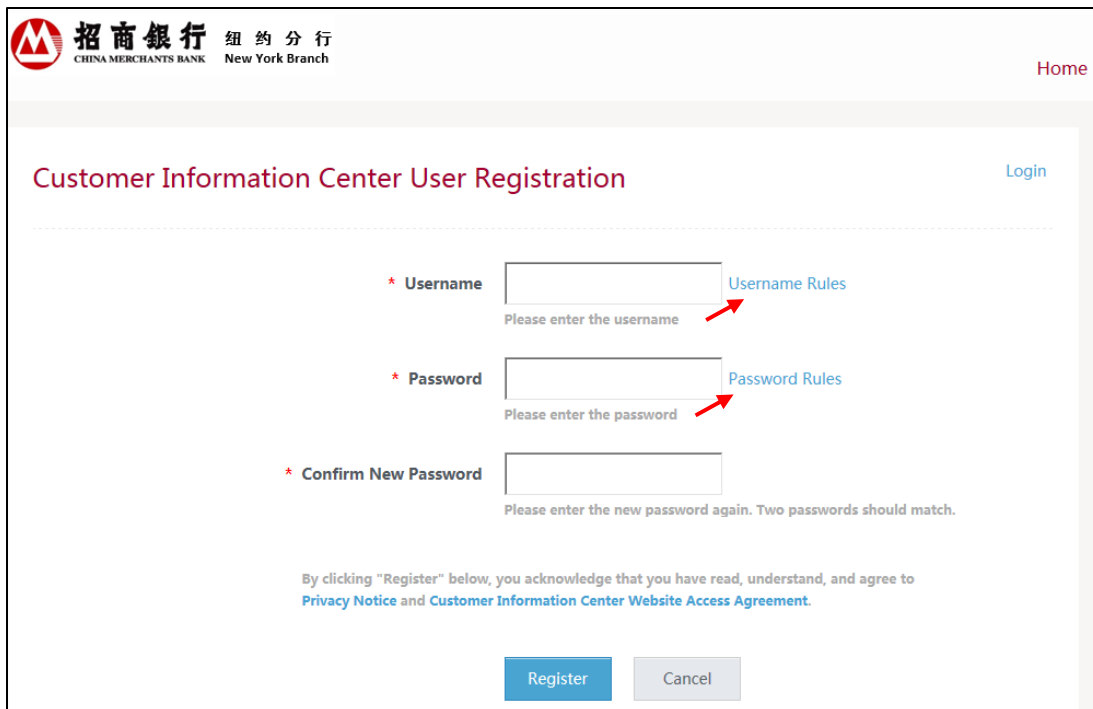
- 2) Enter the **Customer ID** and **Email Address**, then click **Confirm**. If correct data is entered, an email with a registration link will be sent to the email address just entered. Check the email to find the registration link.

\*\* Each Customer ID can be registered only once and has only one username and password. Once the Customer ID is registered, its unique username and password can be used by multiple users of the company.

\*\* Any of the contact persons' email addresses you provide to CMBNY can be used to register.

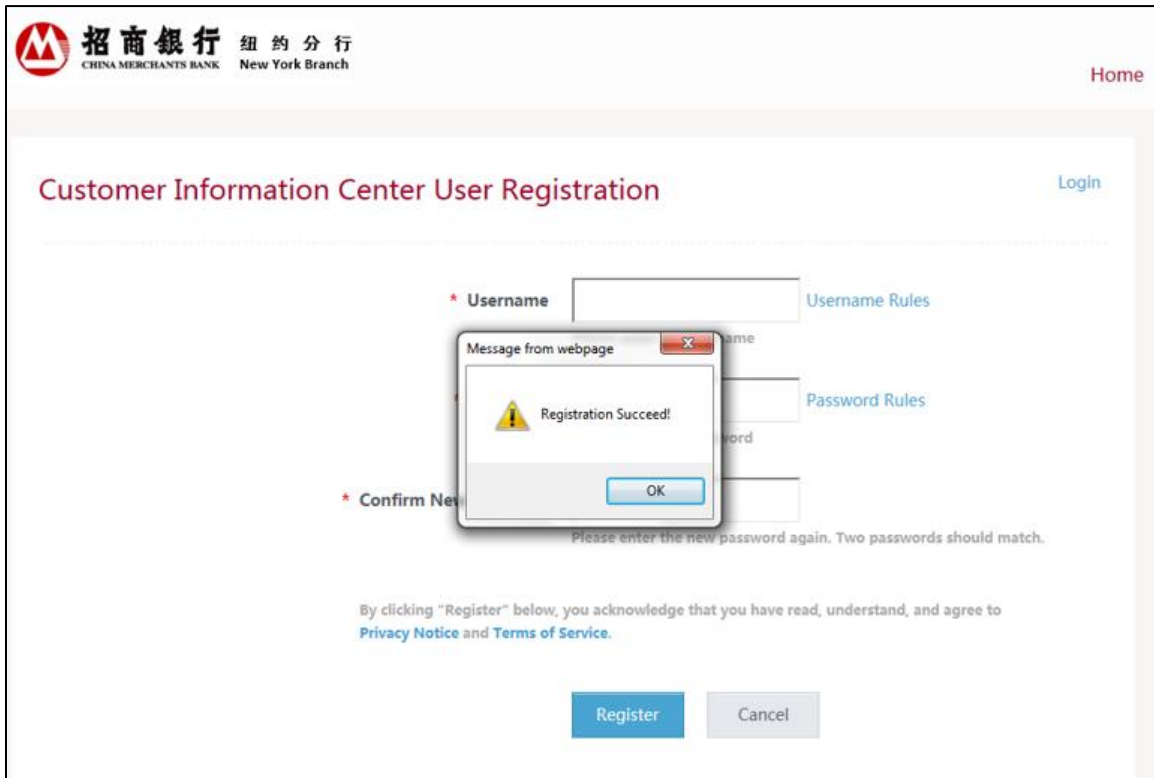


- 3) Click "[click here](#)" in the registration email body. The system will lead you to the page for username and password setup.



- 4) Enter **Username**, **Password**, and **Confirm New Password**. These two new passwords should match. Click **Username Rules** and **Password Rules** for the requirements.

- 5) Click **Register**. You can click [Privacy Notice](#) and [Customer Information Center Website Access Agreement](#) for details before clicking **Register**.
- 6) If qualified data is entered, a “Registration Succeed” pop-up box will appear to confirm that the registration is completed. The system will send a registration confirmation email to all contact persons’ email addresses you provided to CMBNY.

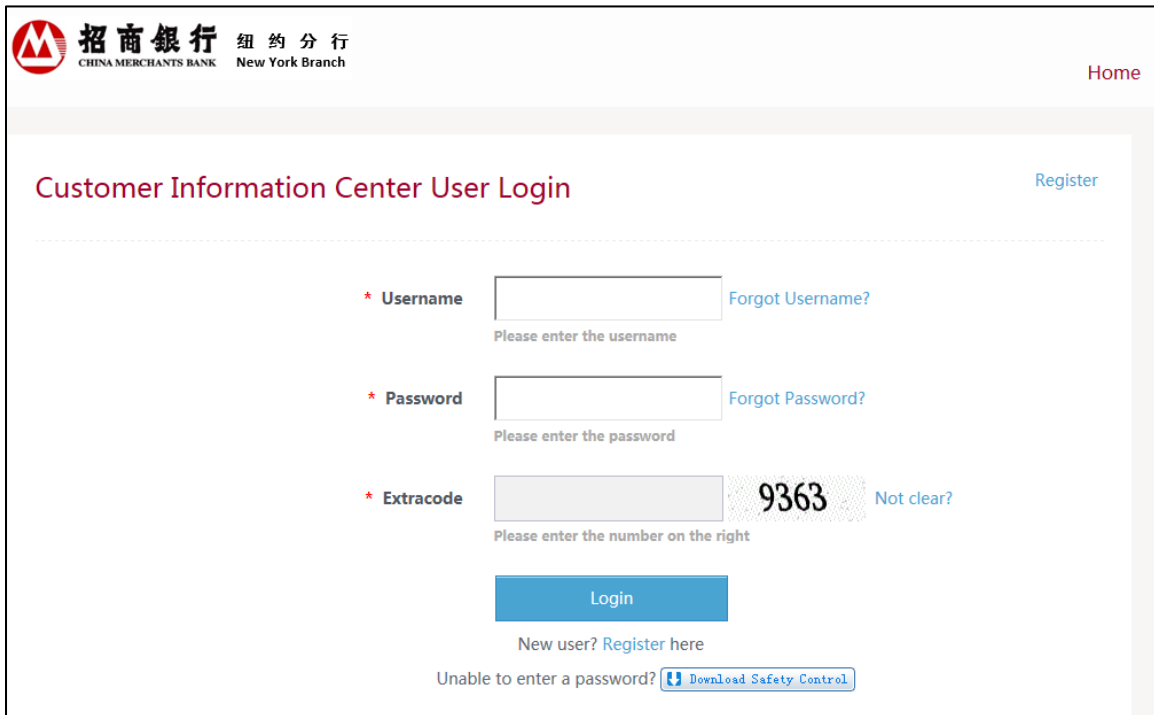


#### 4. Login

Customer can log into the system with the correct username, password, and extracode. Customers can have multiple users login with the same username at the same time.

##### Instructions:

- 1) Enter the **Username**, **Password** and **Extracode** on the Login Page. If the Extracode is not clear, click [Not clear?](#) to get a new extracode.
- 2) Click **Login**. If correct data is entered, you will log into Customer Information Center successfully.



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Home

Customer Information Center User Login [Register](#)

\* Username  [Forgot Username?](#)  
Please enter the username

\* Password  [Forgot Password?](#)  
Please enter the password

\* Extracode  9363 [Not clear?](#)  
Please enter the number on the right

Login

New user? [Register here](#)

Unable to enter a password? [Download Safety Control](#)

\*\* An error message will appear when you are **locked out** because of too many invalid login attempts. Please follow the error message and wait before attempting to login again.

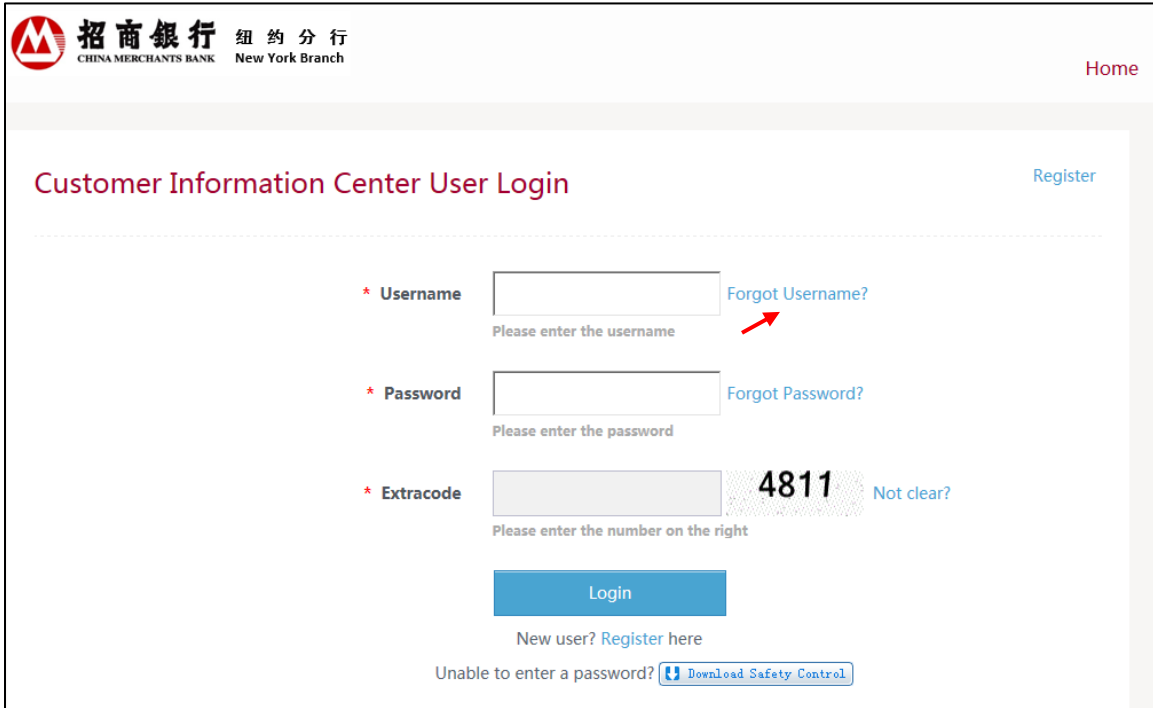
\*\* For security purpose, customer may be presented with “**For Your Security**” pages. Please follow the instructions on each of “**For Your Security**” pages.

## 5. Forgot Username

If you forgot the username, you can find it out through Customer Information Center.

### Instructions:

- 1) Click [Forgot Username?](#) on the Login page, then system will lead you to the Username Retrieval Page.



**Customer Information Center User Login** [Register](#)

\* Username  [Forgot Username?](#)  
Please enter the username

\* Password  [Forgot Password?](#)  
Please enter the password

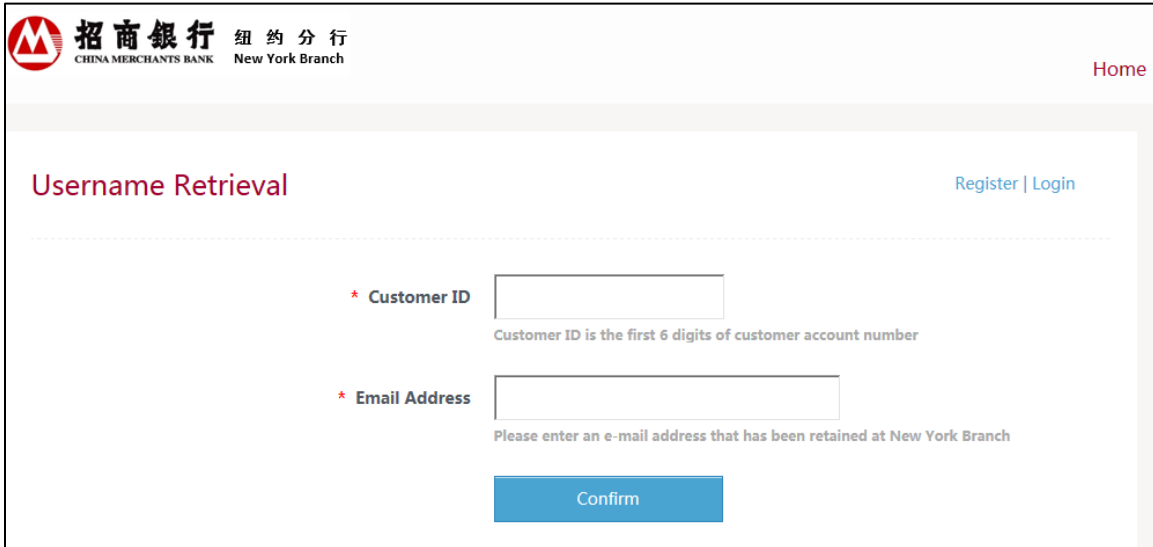
\* Extracode  4811 [Not clear?](#)  
Please enter the number on the right

[Login](#)

New user? [Register here](#)

Unable to enter a password? [Download Safety Control](#)

- 2) Enter **Customer ID** and **Email Address**, and click **Confirm**. If correct data is entered, an email with the username will be sent to the email address just entered. Check the email to find the username.



**Username Retrieval** [Register | Login](#)

\* Customer ID   
Customer ID is the first 6 digits of customer account number

\* Email Address   
Please enter an e-mail address that has been retained at New York Branch

[Confirm](#)

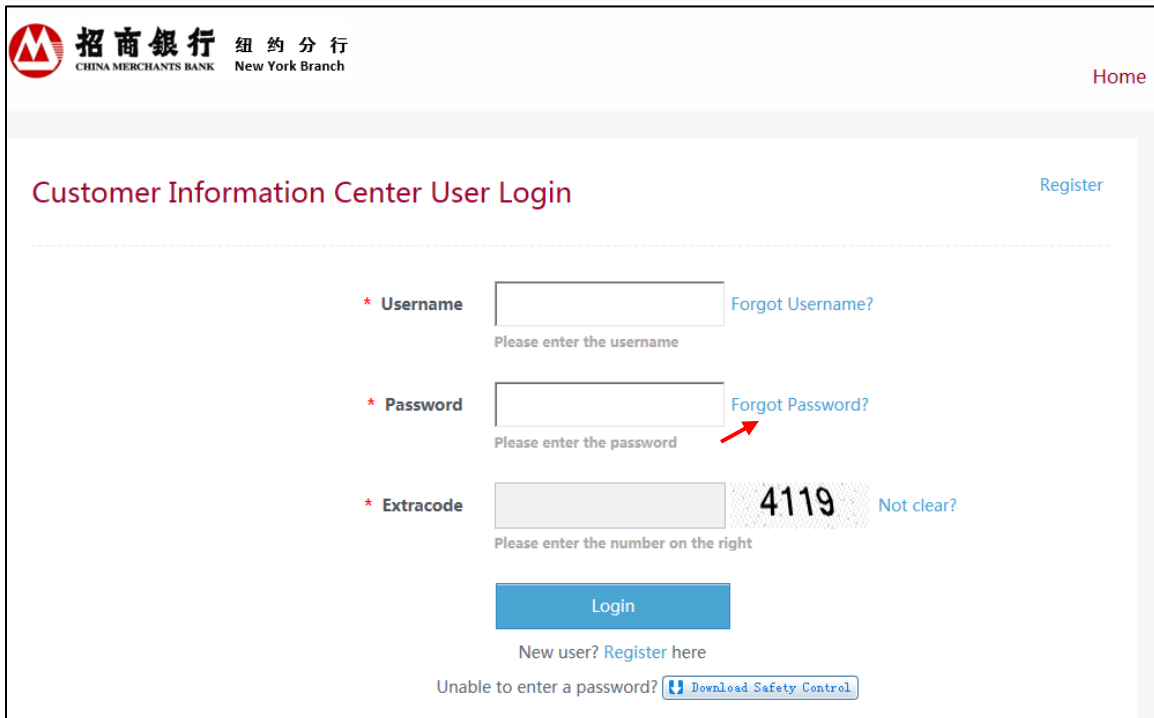
## 6. Forgot Password

If you forgot the password, you can reset it through Customer Information Center.

### Instructions:

- 1) Click **Forgot Password?** on the Login page, then system will lead you to the Password Retrieval Page.





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### Customer Information Center User Login Register

\* Username  [Forgot Username?](#)  
Please enter the username

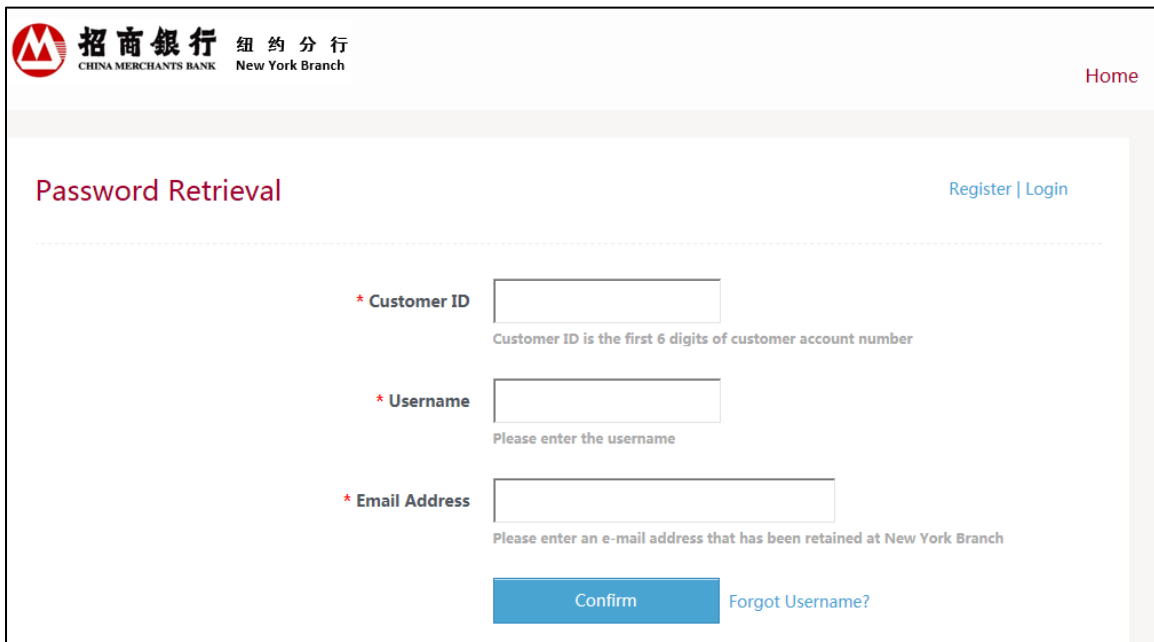
\* Password  [Forgot Password?](#)  
Please enter the password

\* Extracode  4119 [Not clear?](#)  
Please enter the number on the right

New user? [Register here](#)

Unable to enter a password? [Download Safety Control](#)

- 2) Enter **Customer ID**, **Username** and **Email Address**, and click **Confirm**. If correct data is entered, an email with a password reset link will be sent to the email address just entered. Check the email to find the password reset link.



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### Password Retrieval Register | Login

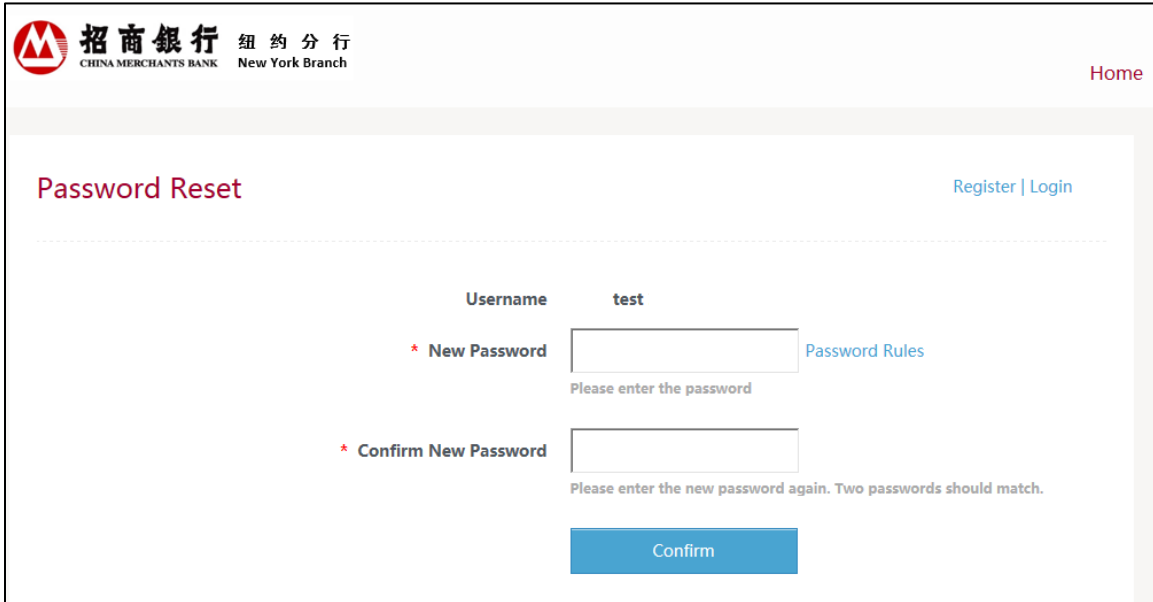
\* Customer ID   
Customer ID is the first 6 digits of customer account number

\* Username   
Please enter the username

\* Email Address   
Please enter an e-mail address that has been retained at New York Branch

[Forgot Username?](#)

- 3) Click "[click here](#)" in the password reset email body. The system will lead you to the Password Reset page.



Home

Register | Login

Username test

\* New Password  Password Rules  
Please enter the password

\* Confirm New Password   
Please enter the new password again. Two passwords should match.

Confirm

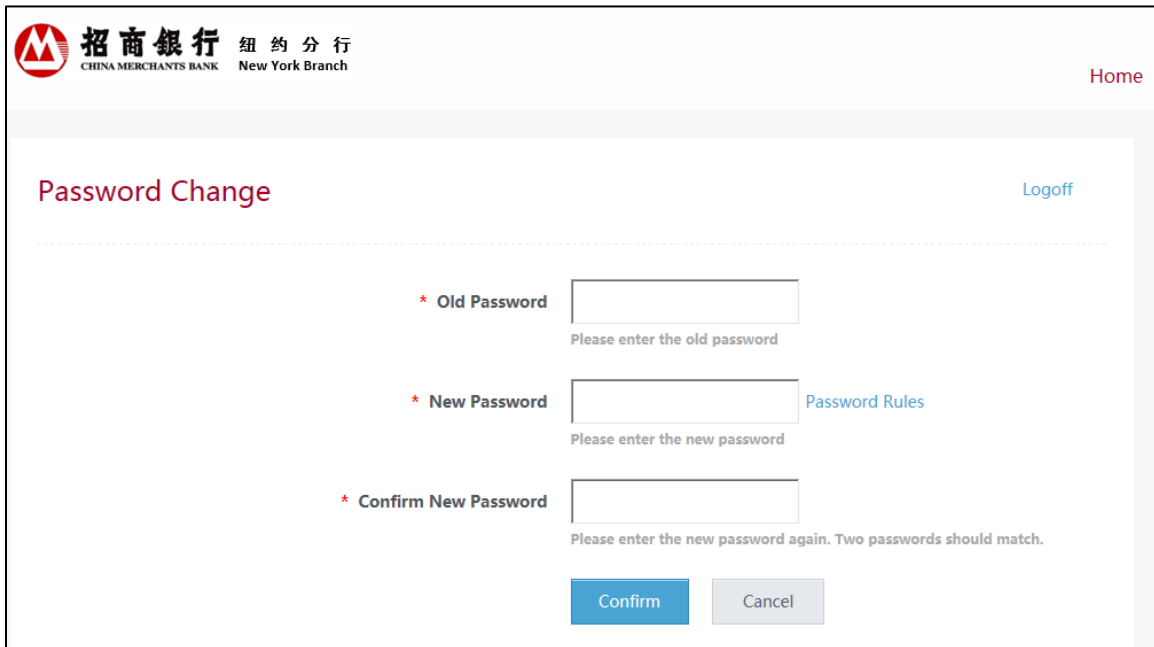
- 4) Enter **New Password** and **Confirm New Password**, then click **Confirm**. These two passwords should match. Click **Password Rules** for the requirements.
- 5) If qualified data is entered, a “Password Reset Succeed” pop-up box will appear to confirm that the password reset is completed. The system will send a password reset confirmation email to all contact persons’ email addresses you provided to CMBNY.

## 7. Change Password

Customer can change password through Customer Information Center at any time.

### Instructions:

- 1) Click “**Change Password**” on the left side of the page after login. Then you will be presented with the Password Change page.



The screenshot shows the 'Password Change' page. At the top left is the CMBNY logo and '招商銀行 紐約分行 CHINA MERCHANTS BANK New York Branch'. At the top right is a 'Home' link. Below the title 'Password Change' is a 'Logoff' link. The form contains three input fields:
 

- \* Old Password: Please enter the old password
- \* New Password: Please enter the new password. A 'Password Rules' link is to the right.
- \* Confirm New Password: Please enter the new password again. Two passwords should match.

 At the bottom are 'Confirm' and 'Cancel' buttons.

- 2) Enter **Old Password**, **New Password** and **Confirm New Password**, then click **Confirm**. These two new passwords should match. Click [Password Rules](#) for the requirements.
- 3) If qualified data is entered, a “Password Change Succeed” pop-up box will appear to confirm that the password change is completed. The system will send a password change confirmation email to all contact persons’ email addresses you provided to CMBNY.

**\*\* We strongly recommend changing passwords regularly to guard against fraud.**

## 8. Operations at Customer Information Center


When the Deal Slip, Monthly Statement or other business notice is available in Customer Information Center, a notification email will be sent to all contact persons’ email addresses which customer provided to CMBNY. Customer can click “[click here](#)” in the notification email to go to Customer Information Center. Customer can also go to Customer Information Center through CMBNY website.

Upon successful login, customer can view, download and print Deal Slip, Monthly Statement, other business notices in Customer Information Center.

### 8.1 Deal Slip Section

#### Instructions:

- 1) Click **Search** directly to view all available Deal Slips or select/input certain criteria such as **Account**, **Date**, **Debit / Credit**, and/or **Amount** to search specific Deal Slips.  
Accounts which have ever generated Deal Slips after October 27<sup>th</sup>, 2016 will be displayed in the account field.
- 2) If there is any record meets the search criteria, the record will be displayed.
- 3) Click **Download (PDF)** of the selected Deal Slip to view, download, or print.


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Home

**Customer Information Center** Logoff

Deal Slip

Monthly Statement

Other Business Notices

Change Password

**Please Input Inquiry Criteria**

Account : All Date : 03/25/2016 To 03/25/2017

Debit / Credit : All Amount : 0.00 To 999999999999.99

Search


**Deal Slip Summary**

Date	Account	Reference No.	Debit/Credit	Currency	Amount	Download
01/20/2017	10 [REDACTED]	MM1622500010;2	Credit	USD	102000000	Download(PDF)
01/20/2017	10 [REDACTED]	MM1622500010;2	Credit	USD	643857.53	Download(PDF)
01/20/2017	10 [REDACTED]	FT1703900189	Debit	USD	8536.32	Download(PDF)

## 8.2 Monthly Statement Section

### Instructions:

- 1) Click **Monthly Statement** on the left side of the page, then you will be presented with Monthly Statement Section.
- 2) All available Monthly Statements are displayed on this page.
- 3) Click **Download (PDF)** of the selected Monthly Statement to view, download, or print.


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Home

**Customer Information Center** Logoff

Deal Slip

Monthly Statement

Other Business Notices

Change Password

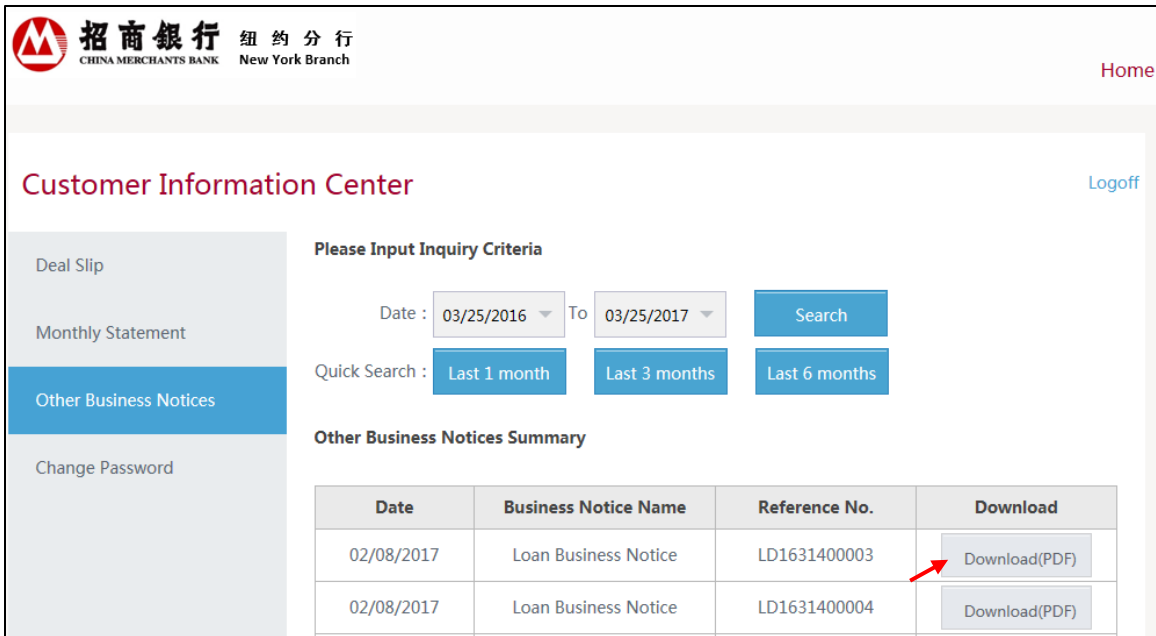
**Monthly Statement Summary**

Statement Month	Download
02/2017	Download(PDF)

### 8.3 Other Business Notices Section

**Instructions:**

- 1) Click **Other Business Notices** on the left side of the page, then you will be presented with Other Business Notices Section.
- 2) Click **Search** directly to view all available Business Notices, or select **Date** to search specific Business Notices. You can also click **Last 1 month**, **Last 3 months** or **Last 6 months** to broaden your search.
- 3) If there is any record meets the search criteria, the record will be displayed.
- 4) Click **Download (PDF)** of the selected Business Notice to view, download, or print.



The screenshot shows the 'Customer Information Center' interface. On the left is a navigation menu with 'Other Business Notices' selected. The main area has a search section titled 'Please Input Inquiry Criteria' with date pickers for '03/25/2016' to '03/25/2017' and a 'Search' button. Below are 'Quick Search' buttons for 'Last 1 month', 'Last 3 months', and 'Last 6 months'. A table titled 'Other Business Notices Summary' displays the following data:

Date	Business Notice Name	Reference No.	Download
02/08/2017	Loan Business Notice	LD1631400003	<a href="#">Download(PDF)</a>
02/08/2017	Loan Business Notice	LD1631400004	<a href="#">Download(PDF)</a>

### 9. Contact Us

China Merchants Bank New York Branch

Address: 535 Madison Avenue, 18th floor, New York, NY 10022

Tel: (212) 753 1801

Please feel free to contact your relationship manager if you have any questions during the use of Customer Information Center.