Customer Information Center

User Manual

V 2.0

China Merchants Bank New York Branch

June 2022

Contents

1. Overview of Customer Information Center

Welcome to Customer Information Center!

This user manual aims to help customers to understand all functionalities and provide a guidance for customers to better use the Customer Information Center.

Please read this user manual carefully.

1.1 Who Should Read this Manual?

This user manual is prepared for those who will view, download, or print Deal Slips, Monthly Statements, 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 Slips, Monthly Statements and other business notices online. Customers can use Customer Information Center service 24/7.

All documentations in Customer Information Center are available in PDF format up to 13 months. Documentations older than 13 months will not be available in Customer Information Center.

For new customers, please access Customer Information Center 24 hours after receiving the first Account Opening Advice. Customers who recently closed all accounts with China Merchants Bank New York (CMBNY) will have access to Customer Information Center for two months from the date of the last account closure.

2. Website Requirements

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

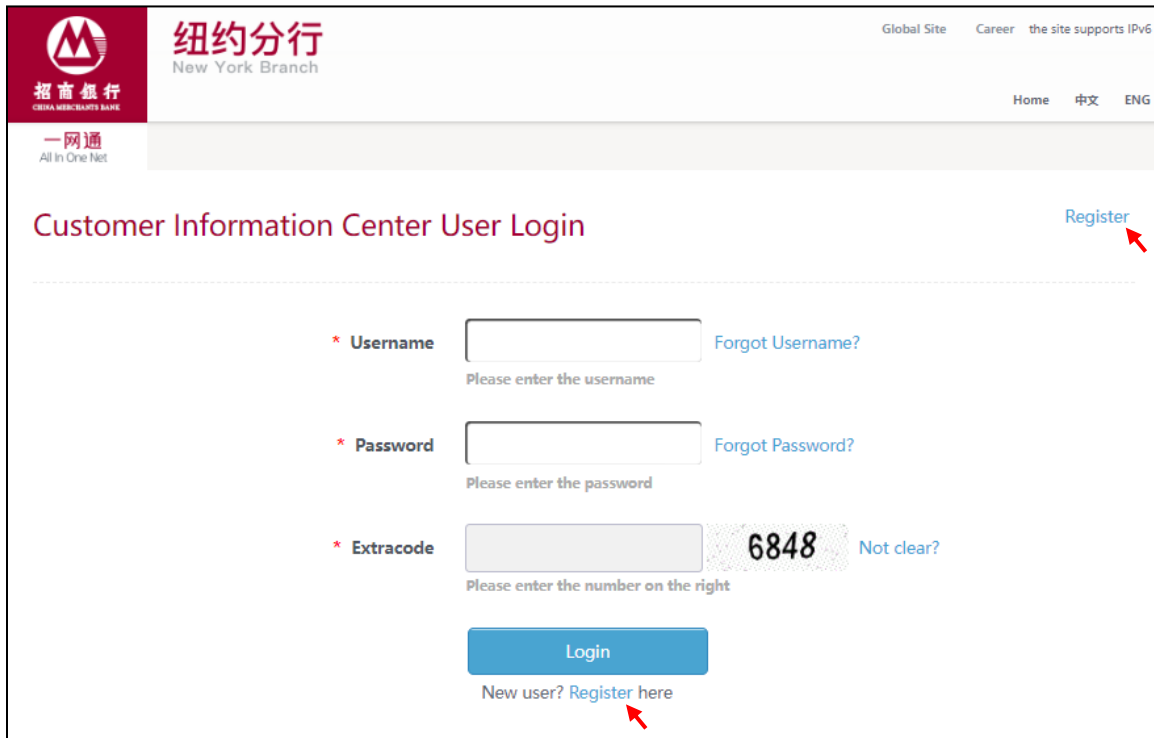Customer Information Center is now compatible with Chrome and Microsoft Edge.

Note: We suggest users to login with Chrome and Microsoft Edge due to the retirement of Internet Explorer (IE) on June 15, 2022. The functionality of Customer Information Center on IE will no longer be updated. In addition, Safari does not have full supports of Customer Information Center yet.

3. Register

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

Instuctions:

1) Click "**Register**" in the upper right corner or the bottom of the Login Page, you will be presented with the Registration Page.

2) Enter the **Customer ID** and **Email Address**, click "**Confirm**". If correct data is entered, you will receive an email with the registration link.

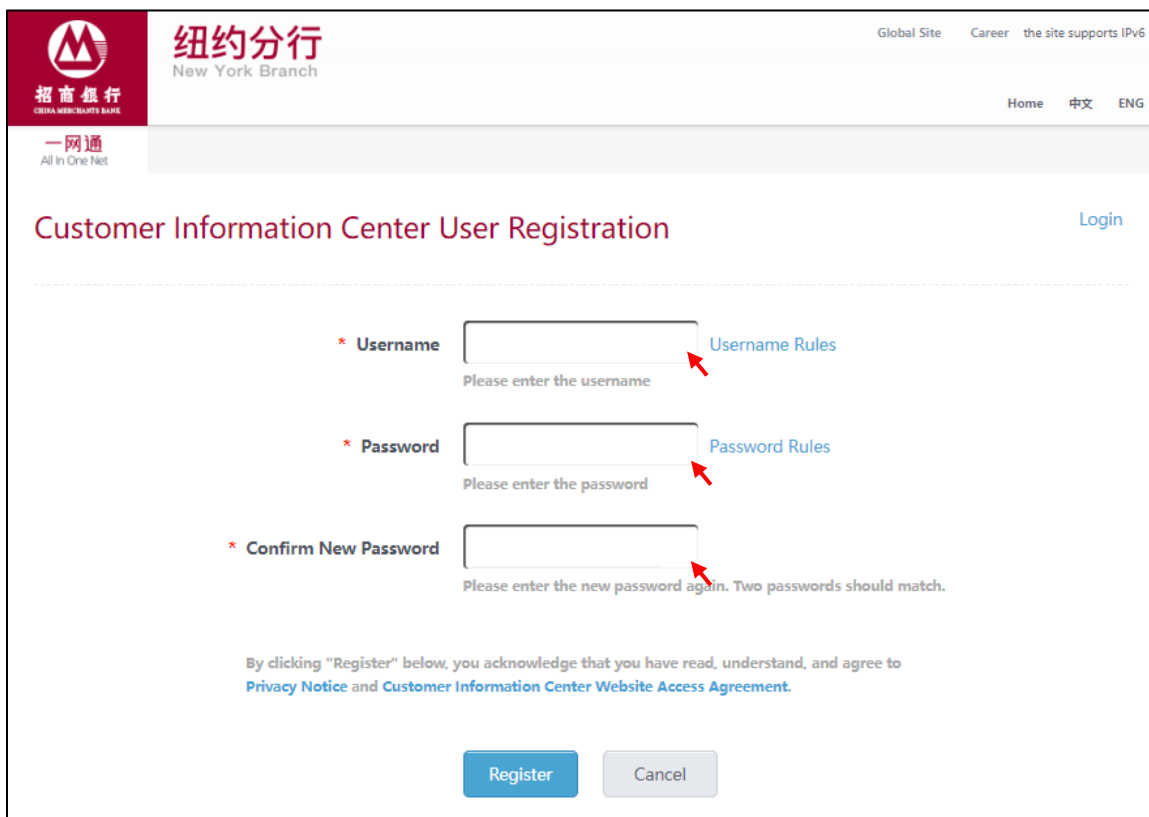** Any of the contact persons' email addresses you provided to CMBNY can be used to register.

3) Click on "**click here**" in the registration email. The system will guide you to the page to setup your username and password.

Enter **Username, Password,** and **Confirm New Password.** The two passwords need to match. Review the **Username Rules** and **Password Rules** for the requirements.

** 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.

4) Click "**Register**". Please read the **Privacy Notice** and **Customer Information Center Website Access Agreement** for details before registering.
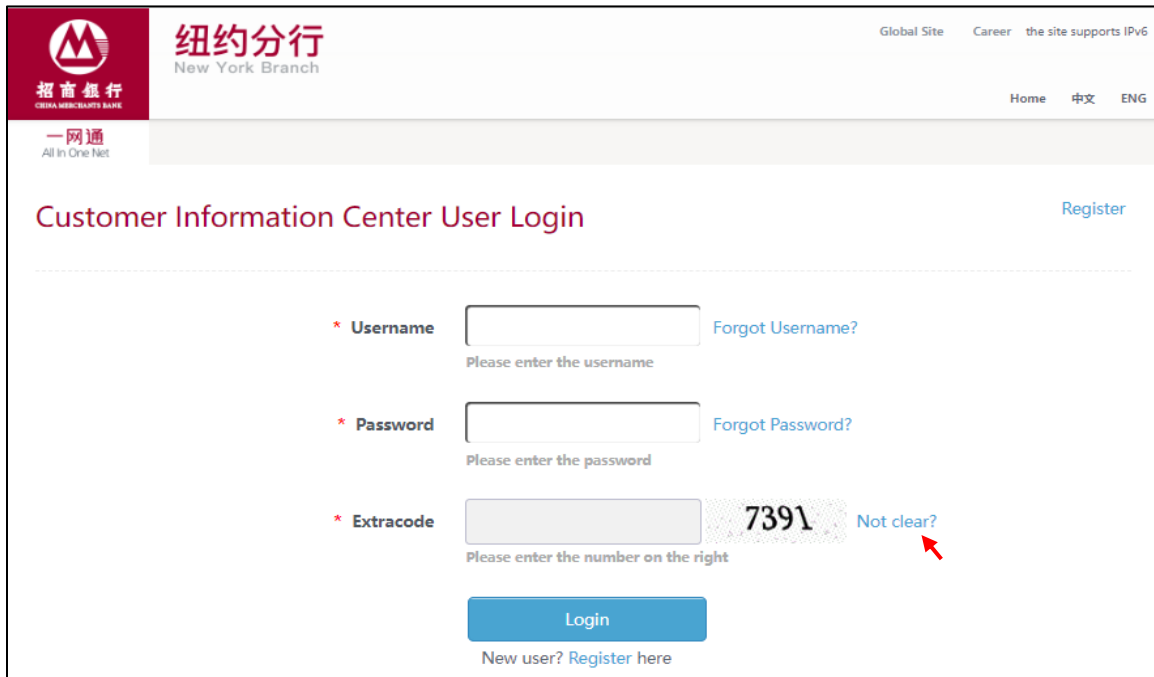
5) If correct data is entered, a "Registration Succeed" pop-up box will appear to comfirm that the registration is completed. The system will send a registration confirmation email to all the contact persons' email addresses that were retained at CMBNY.

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 and password.

Instructions:

1) On the login page, Enter the **Username**, **Password** and **Extracode**. If the Extracode is not clear, click "**Not clear?**" to get a new extracode.
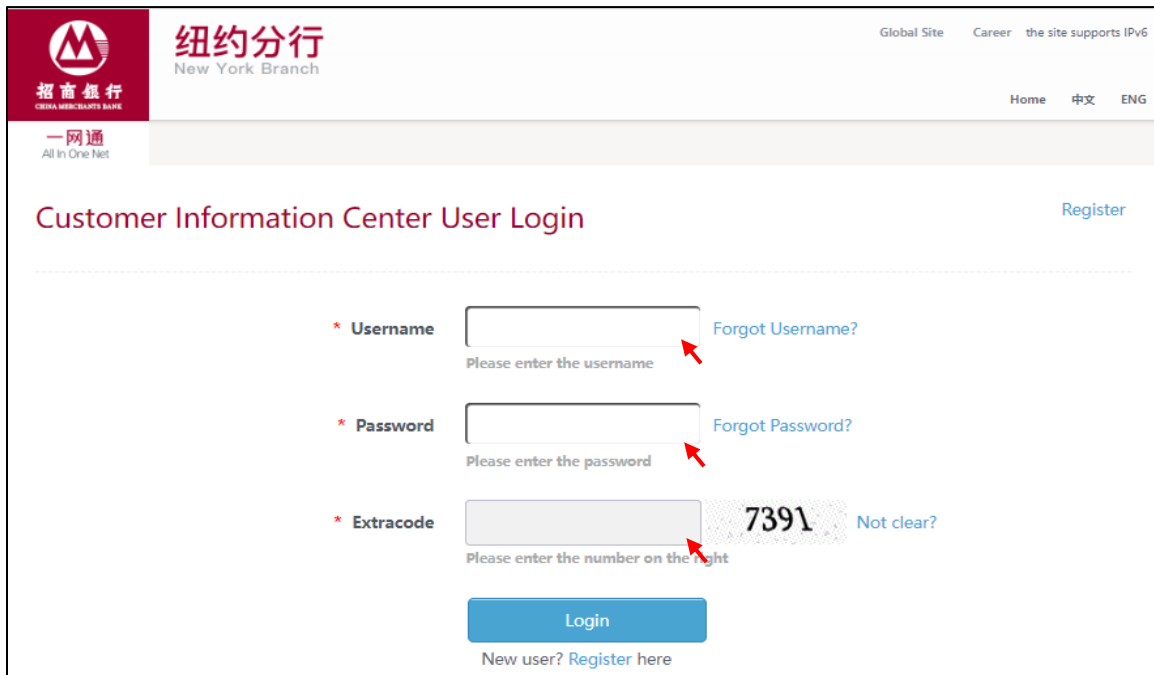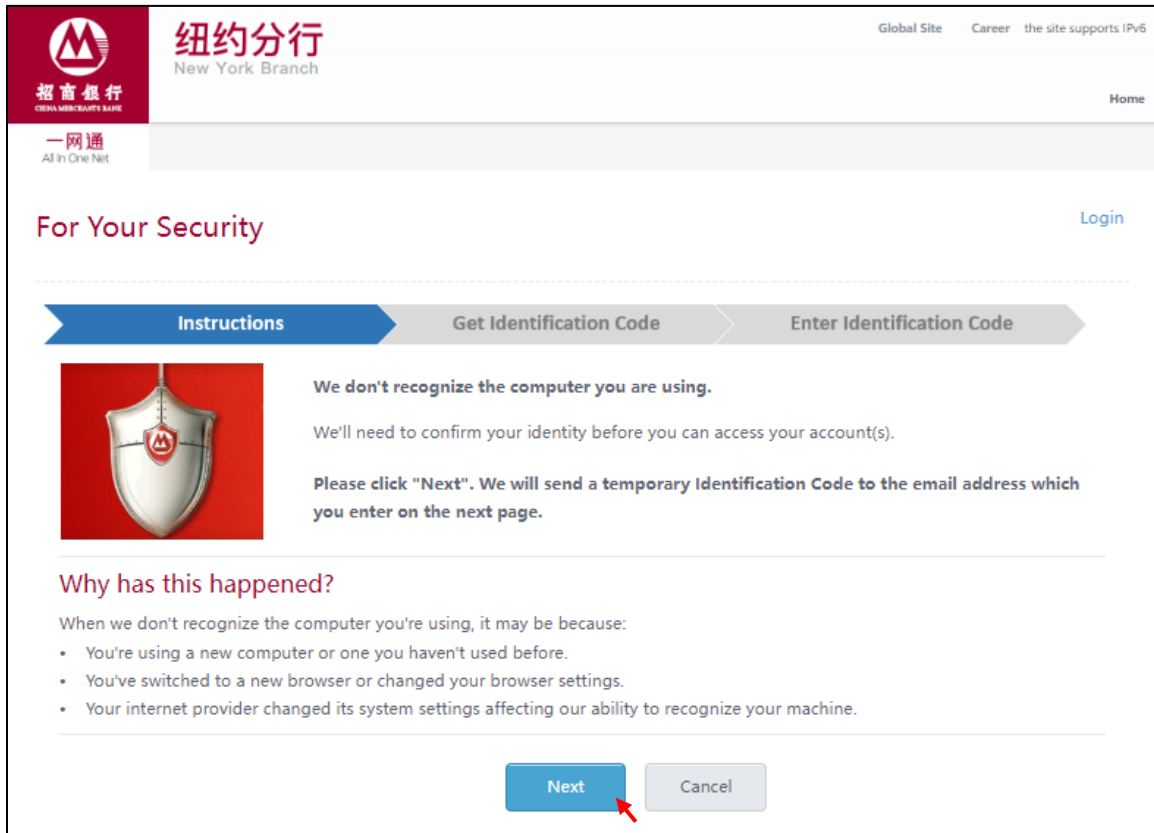
2) Fill in the Username, Password, and Extracode, and Click "**Login**". If you are using a new computer or one you have not used before, switching to a new browser or changed your browser settings, or your internet provider changed its system settings affecting abilitiy to recognize the machine, Customer Information Center will require a Indentification Code.

** 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.

3) Review all the instruction, and click "**Next**".

4) On the "Get Identitifcation Code" page, enter the Customer ID and the email address which you would like to receive the Identification Code. This email address has to be one of the contact persons' email addresses retained at CMBNY. Go on "**Click to get Identification Code**" to receive a identification code on the email.

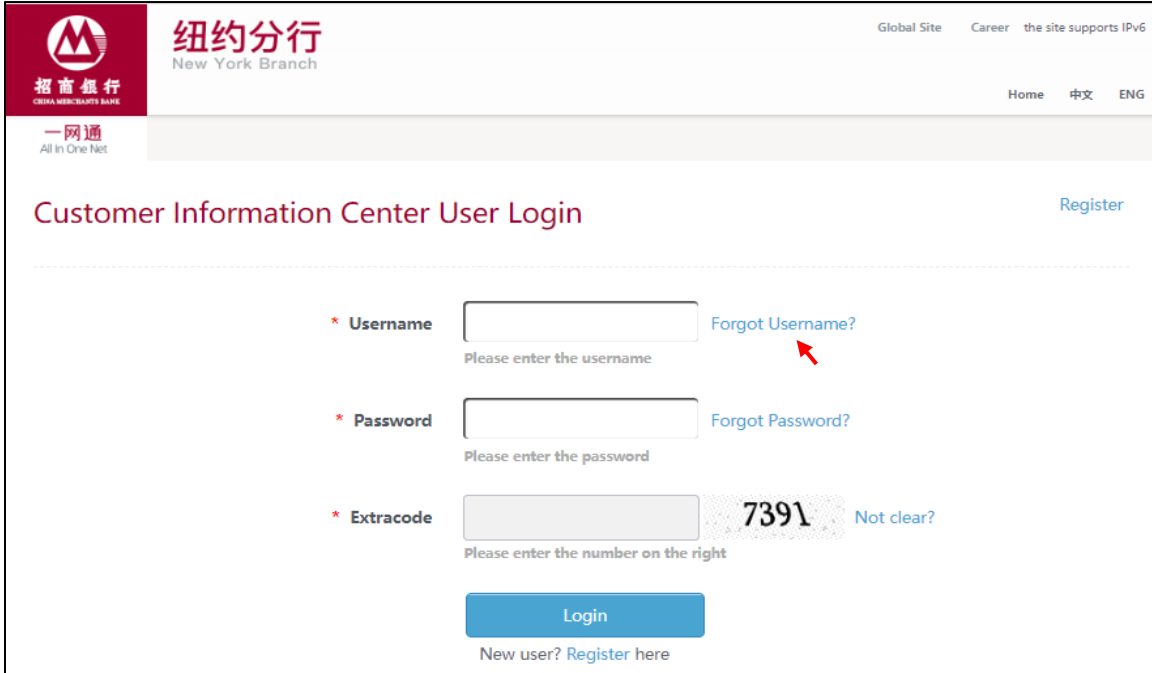5) Enter the Indentification Code from the email and the password accordingly.

5. Forgot Username

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

Instructions:

1) Click "**Forgot Username?**" On the Login page, system will lead you to Username Retrieval Page.

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.

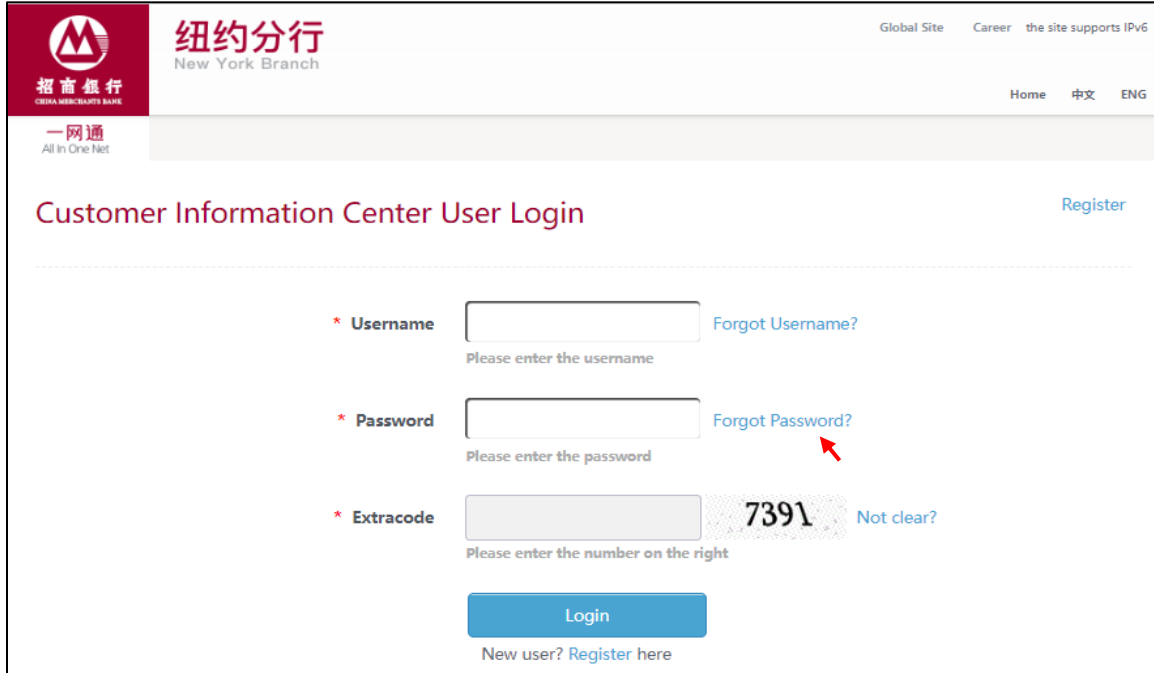** The email address has to be one of the contact persons' email addresses retained at CMBNY.

6. Forgot Password

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

Instructions:

1) Click "**Forgot Password?**" on Login page, then system will lead you to Password Retrieval Page.
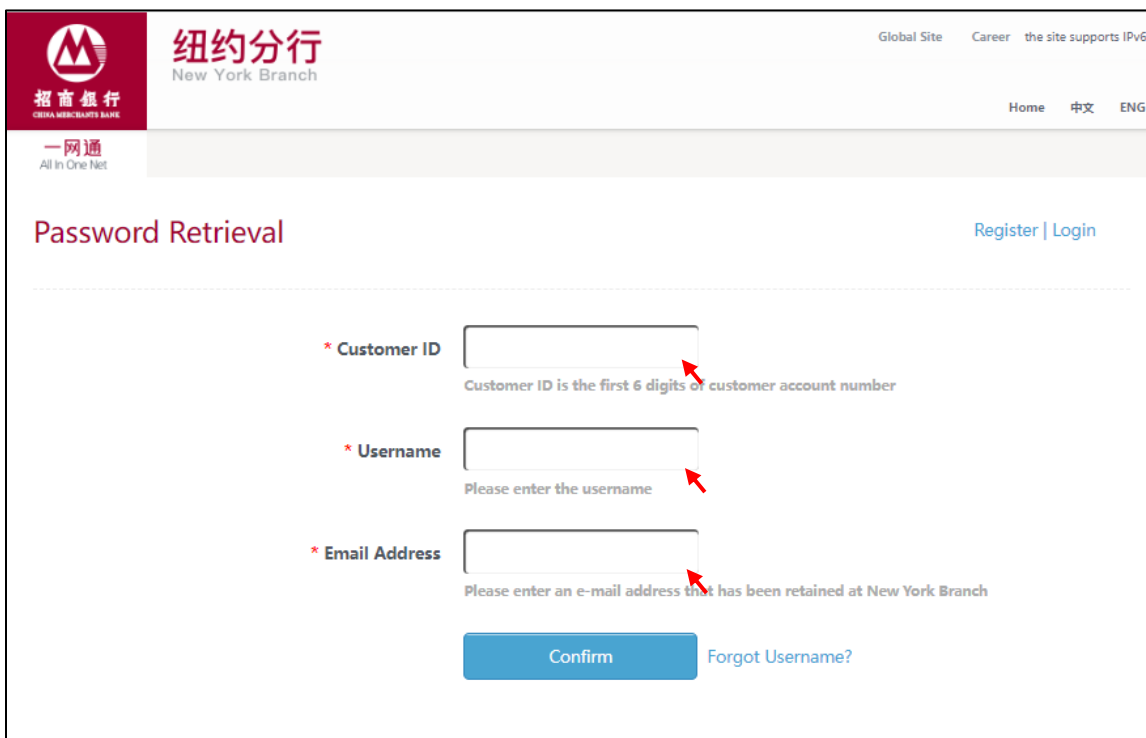
3) Enter **Customer ID**, **Username** and **Email Address**, and click "**Confirm**". If correct data is entered, an email with the password reset link will be sent to the email address just entered.

** The email address has to be one of the contact persons' email addresses retained at CMBNY.
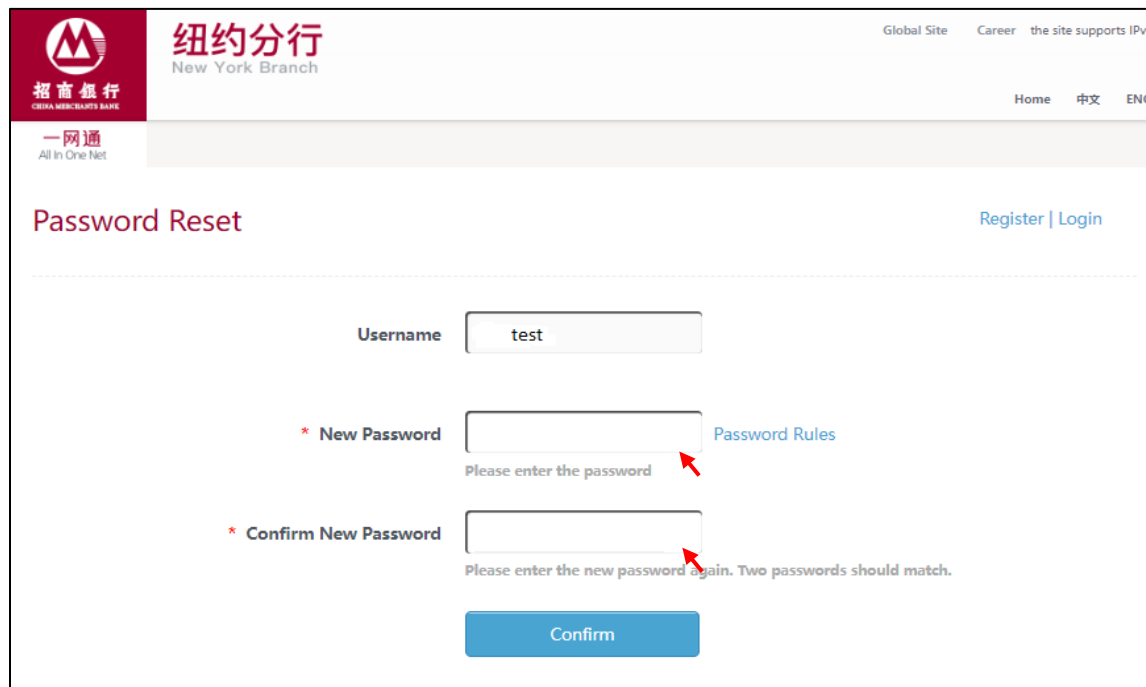
2) Click "click here" in the password reset email. The system will lead you to the Password Reset page.

3) Enter **New Password** and **Confirm New Password**, click "**Confirm**". The two new passwords should match. Click "**Password Rules**" for the requirements.

4) If qualified data is entered, a "Password Reset Succeed" pop-up box will appear to comfirm that the password reset is completed. The system will send a password reset confirmation email to all the contact persons' email addresses retained at 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. You will be presented with the Password Change page.
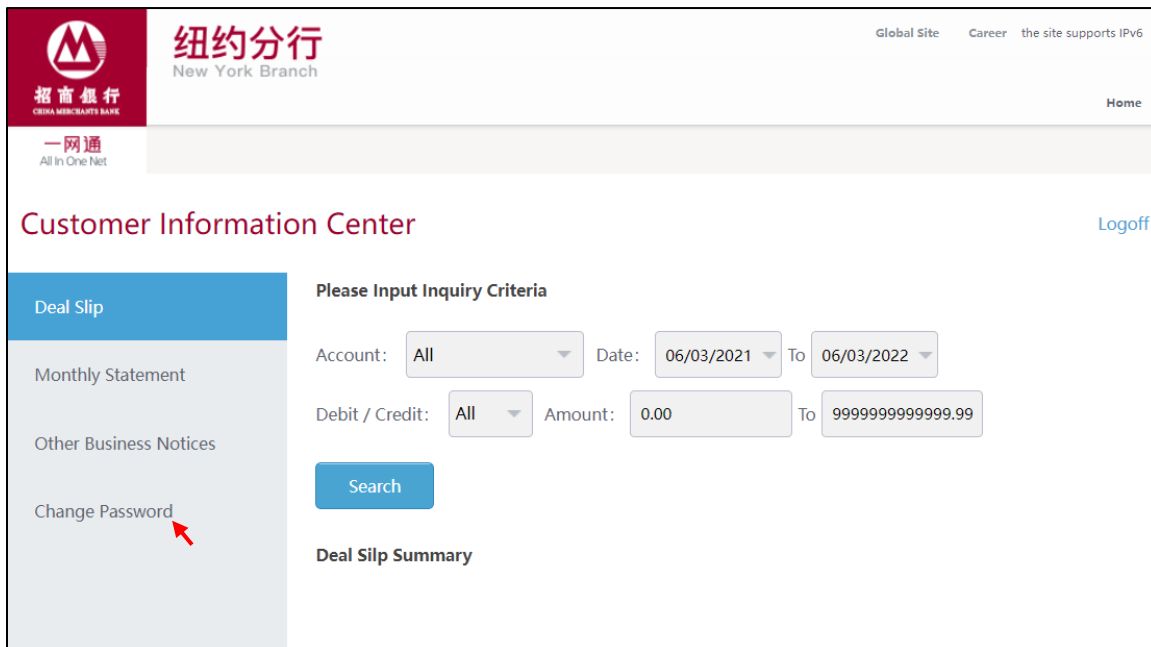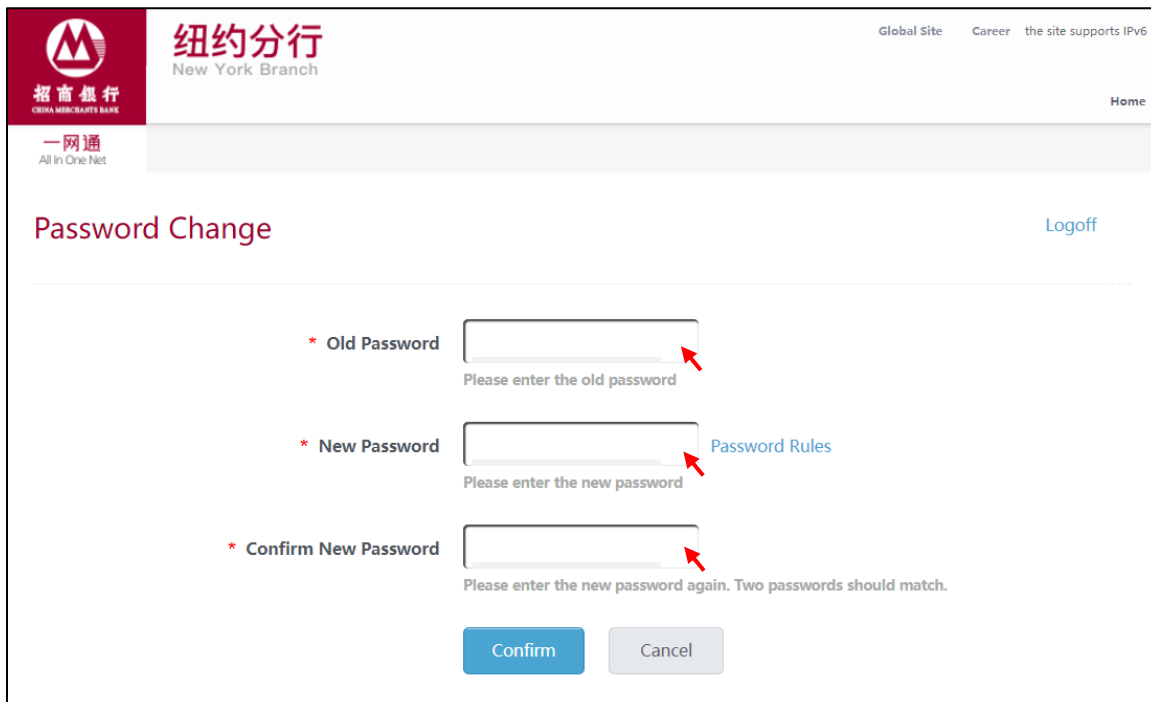

2) Enter **Old Password**, **New Password** and **Confirm New Password**, click "**Confirm**". The two new passwords should match. Click "**Password Rules**" for the requirements.

3) If qualified data is entered, a "**Password Change Succeed**" pop-up box will appear to comfirm that the password change is completed. The system will send a password change confirmation email to all the contact persons' email addresses retained at CMBNY.

** We strongly recommend changing passwords regularly to prevent fraudulent activities.

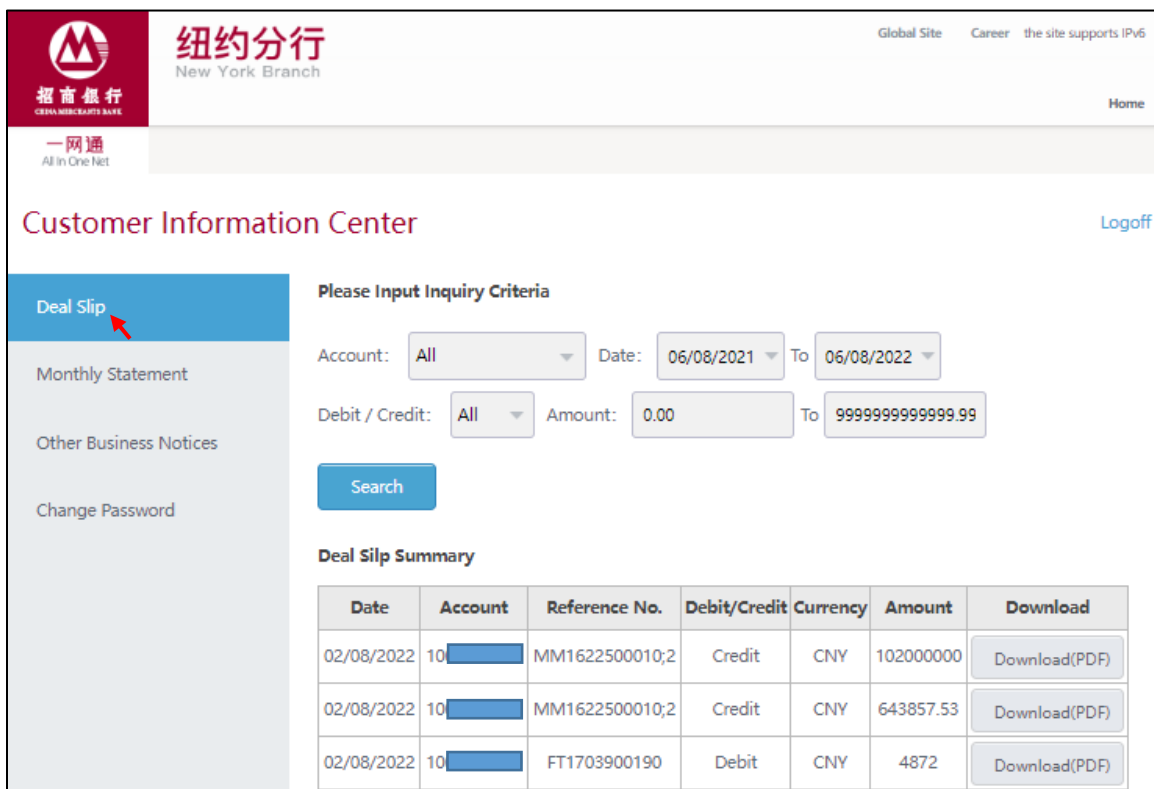## 8. Operations at Customer Information Center

Customers will receive an email notification when Deal Slips, Monthly Statements or other business notices are aviliable in Customer Information Center. Customer can view the information by clicking on "click here" in the notification email to login Customer Information Center or directly through the CMBNY website.

Upon successful login, customers can view, download and print Deal Slips, Monthly Statements, other business notices in their acounts.

8.1 Deal Slip

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.

2) If there is any record meets the search criteria, the record will be displayed.

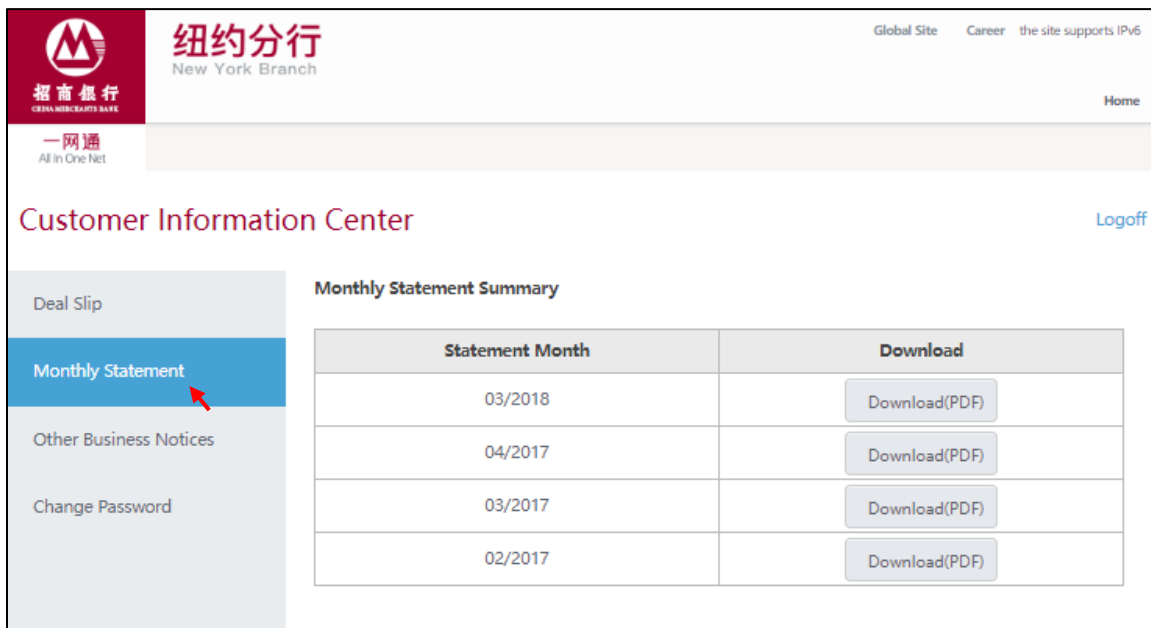3) Click "**Download (PDF)**" of the selected Deal Slip to view, download or print.

8.2 Monthly Statement

Instructions:

1) Click "**Monthly Statement**" on the left side of the page, all available Monthly Statement will be shown on the right of the webpage.

2) To view, download or print by clicking the "**Download (PDF)**" button.

8.3 Other Business Notices

Instructions:

1) Click "**Other Business Notices**" on the left side of the page, you will be presented with Other Business Notices Section.

2) Click "**Search**" to view all available Business Notices, or select **Date** to search for specific Business Notice(s). There are options for **Last 1 month, Last 3 months** or **Last 6 months** to broaden your search.

3) The records will be displayed if the record(s) meet the search criteria. Click "**Download (PDF)**" of the selected Business Notice to view, download or print.

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.