

SMART Click User Guide

March 2009

Client Management Training Services

Contents

SMART Click Registration..... 4

Editing Personal Information 8

Other Features **Error! Bookmark not defined.**

 Available Applications 9

 If You Forget Your Password 9

 If You Forget Your User ID..... 10

Contact Information..... 10

Introduction to SMART Click

SMART Click is a user registration tool that allows CME Group customer and clearing member staff to create a user ID and registration profile that will be used to access CME Group applications that have been integrated with the SMART Click registration tool. The following systems are currently integrated with SMART Click:

- [FirmSoft version 6.0](#)

The **SMART Click** offers several important features and benefits to its users. Specifically:

- **Self-Management of Contact Information** allows users of CME Group applications' to spend less time entering personal information and completing paperwork. User information is entered **one time in one place** and can be updated by users at their convenience.
 - **Use of a Single User ID** requires that users remember and enter just one user ID across all SMART Click enabled applications.
 - **On-Line Registration** allows users to create and maintain a unique user ID and password and enter and update profile information through a browser-based interface.
- Forgot My User ID** and **Forgot My Password** allow users to retrieve their user IDs and passwords on-line without having to contact CME Group's Customer Support for help.

SMART Click End-User License Agreement

By registering and logging into **SMART Click**, for the first time, you agree to the End-User License Agreement, which is a legal agreement between you and CME Group Inc. Be sure to review the End-User License Agreement by clicking on the End-User License Agreement hyperlink located on the *SMART Click Registration and Login* screen.

SMART Click Registration

To create a SMART Click profile, user ID and password users must complete steps 1-10 to complete the SMART Click registration process. Log in to the **SMART Click Registration/Login** screen by accessing the Internet, and entering the following address in your Internet browser: <https://smartclick.cmegroup.com>



 **CME Group** | SMART Click Registration
A CME/Chicago Board of Trade/NYMEX Company

Login to SMART Click Registration

SMART Click ID

Password

[Need to register?](#)
[I forgot my password](#)
[I forgot my User ID](#)

This version of SMART Click is CME private property.
By logging in to SMART Click, you agree to the [User License Agreement](#).

SMART Click is optimized for Internet Explorer version 6.0 or above.

©2008 CME Group Inc. | Version: 1.3.0 | Last Update: 01/09/2009

The SMART Click login registration screen will display the following fields and links:

- SMART Click ID
- Password
- Need to register?
- I forgot my password
- I forgot my User ID
- User License Agreement

1. To begin your **SMART Click** registration click the **'Need to register?'** link, which will direct you to the 'CREATE A SMART CLICK LOGIN' registration form.

CREATE A SMART CLICK LOGIN

PERSONAL INFORMATION *Required

*First Name Middle Initial *Last Name

To properly verify your identity, the following information is required:

*Date of Birth *SSN or Tax ID (last 4 digits)

*Preferred Email Address (This will be used to activate your account)

*Country

*Address

*City *State/Province *Zip/Postal Code

*Primary Phone Number Ext.

Alt. Phone Number Ext.

LOGIN INFORMATION

*SMART Click ID

*Create New Password *Confirm New Password

*Security Question

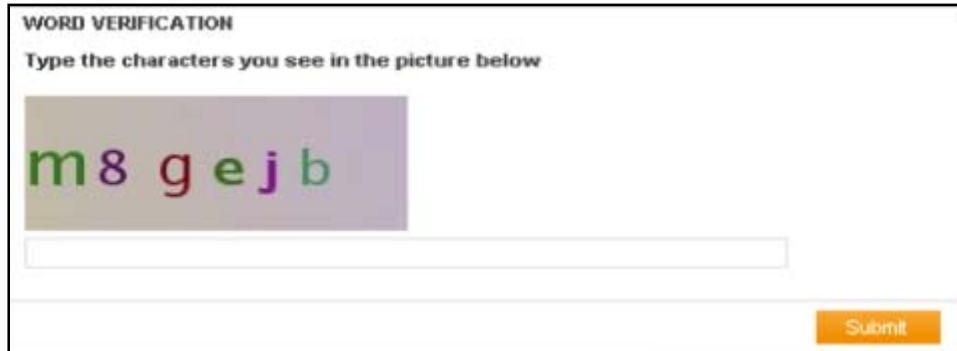
*Security Answer

*Confirm Security Answer

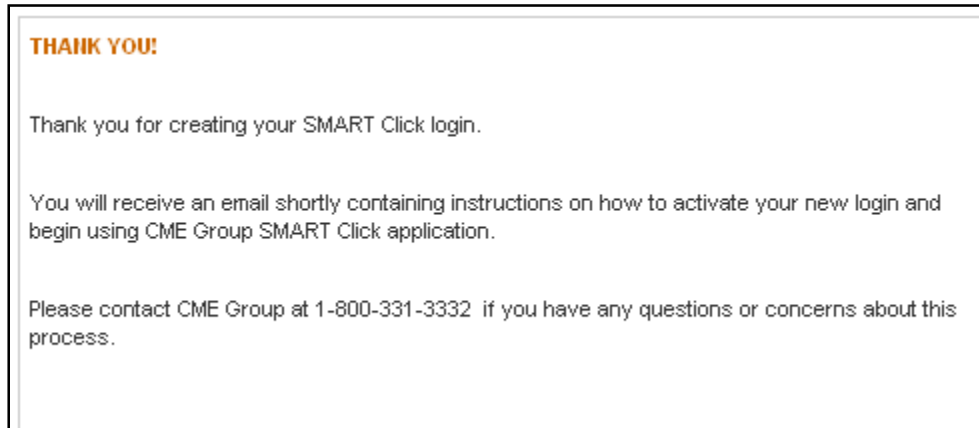
2. Enter the following information. (An asterisk (*) indicates required fields):

- *First, Middle Initial and *Last Name
- *Date of Birth (MM/DD/YYYY)
- *SSN or Tax ID (last 4 digits)
- *Preferred Email Address
- *Country
- *Address, *City, *State and *Zip Code
- *Primary Phone Number

- Alternate Phone Number
 - *User ID (6 to 14 characters)
 - *Create New Password (between 8 and 32 characters, at least one non-alphanumeric character)
 - *Confirm New Password
 - *Security Question (at least 9 characters)
 - *Security Answer
3. Click **Submit** after entering your personal information.
 4. Enter the characters that are displayed in the **Word Verification** picture and click **Submit**. A Thank You page will display.



The screenshot shows a 'WORD VERIFICATION' section. It instructs the user to 'Type the characters you see in the picture below'. The picture displays the characters 'm8gejb' in a distorted font. Below the image is a text input field and a 'Submit' button.



The screenshot shows a 'THANK YOU!' message. The text reads: 'Thank you for creating your SMART Click login. You will receive an email shortly containing instructions on how to activate your new login and begin using CME Group SMART Click application. Please contact CME Group at 1-800-331-3332 if you have any questions or concerns about this process.'

5. Close the Internet browser. An email message will be sent to the address entered in the Preferred Email Address field to complete the activation of your SMART Click user ID.
6. **Click the link** in the email message to activate your SMART Click User ID.

Thank you for registering to be a CME Group SMART Click user. To activate your account and verify your e-mail address, please click on the following link:
<https://nrsmartclick.cmegroup.com/smartclick/activateAccount.action?method=activate&key=e4BsPHgnNb8VE34%2FPzA07NuqhsLFDCpJ>

If you have received this mail in error, you do not need to take any action to cancel the account. The account will not be activated, and you will not receive any further emails.

If clicking the link above does not work, copy and paste the URL in a new browser window instead.

For questions or concerns regarding your account, please contact firmsupport@cmegroup.com.

Do not reply to this message as replies to this message are not monitored or answered.

CME Group is a trademark of CME Group Inc. The Globe logo, Globex, CME and Chicago Mercantile Exchange are trademarks of Chicago Mercantile Exchange Inc. CBOT and Chicago Board of Trade are trademarks of the Board of Trade of the City of Chicago. NYMEX, New York Mercantile Exchange and ClearPort are trademarks of New York Mercantile Exchange, Inc. COMEX is a trademark of Commodity Exchange, Inc.

Copyright 2008 CME Group. All rights reserved.

- You will be redirected to the Thank You page and should click **Continue** to return to the **SMART Click Registration/Login** screen.

THANK YOU!


Thank you for activating your account. Your SMART Click ID is now verified and ready for use on CME Group SMART Click enabled applications.

[Continue](#)

- After returning to the **SMART Click Registration/Login** screen, enter the **SMART Click ID** and **Password** that was created on the 'Create a SMART Click Login' form.
- Click **Log In**, and verify your personal information on the 'Verify Your Information' screen. Upon completion of the registration process, a token will be displayed in the SMART Click tool which the user may need to give to his/her clearing firm administrator to enable access to a SMART Click integrated application.

VERIFY YOUR INFORMATION Edit My Information		Token Generate New Token								
PERSONAL INFORMATION First Name: tina Middle Initial: h Last Name: bhatt Date of Birth: 11/30/1970 SSN or Tax ID (last 4 digits): 3163 Preferred Email Address: guang.yao@cmegroup.com Country: United States Address: 20 S. wacker City: chicago State/Province: Illinois Zip/Postal Code: 60611 Primary Phone Number: 3129304524 Ext.: Alt. Phone Number: 3129304524 Ext.:		This token will expire on 3/16/2009 423529 Give this token to your administrator as needed.								
LOGIN INFORMATION <table border="1"> <thead> <tr> <th>SMART Click ID</th> <th>Password</th> <th>Security Question</th> <th>Security Answer</th> </tr> </thead> <tbody> <tr> <td>tina.bhatt5</td> <td>*****</td> <td>what is my youngest daughter's name ****</td> <td></td> </tr> </tbody> </table>		SMART Click ID	Password	Security Question	Security Answer	tina.bhatt5	*****	what is my youngest daughter's name ****		CME Group SMART Click Application FirmSoft
SMART Click ID	Password	Security Question	Security Answer							
tina.bhatt5	*****	what is my youngest daughter's name ****								

- To exit the **SMART Click**, click the **Logout** link.


SMART Click Registration
Logged in: tina.bhatt5 | [Logout](#)

Editing Personal Information

1. Should you need to update your personal information or SMART Click user ID and password, log into the **SMART** and click the '**Edit My Information**' hyperlink located on the Personal Information screen.



Available Applications

Applications requiring a SMART Token ID will be listed in the CME Group SMART Application section. Currently only the FirmSoft application requires a Token, but other applications will be added in the future that will also require a Token.



CME Group SMART Application

FirmSoft

Requesting a New Token

The SMART Click token will appear with an expiration date on the 'Verify Your Information' screen within the application. To generate a new token, click '**Generate New Token**'. A new token will be displayed with a new expiration date. SMART Click tokens are valid for 7 days.



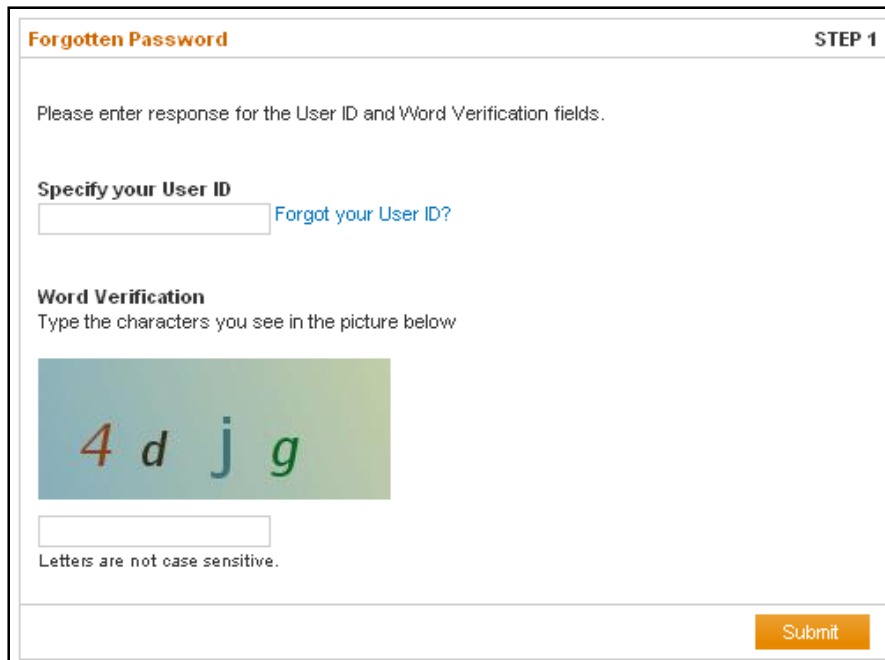
Token Generate New Token

This token will expire on 3/16/2009
893265

Give this token to your administrator as needed.

If You Forget Your Password

1. Click **I forgot my password** on the SMART Click login screen
2. Enter **User ID**.
3. Enter the **Word Verification** characters shown
4. Click **Submit**.




Forgotten Password STEP 1

Please enter response for the User ID and Word Verification fields.

Specify your User ID [Forgot your User ID?](#)

Word Verification
Type the characters you see in the picture below



Letters are not case sensitive.

Submit

The **Complete Challenge Response** screen will display.

5. Enter the answer to the challenge question displayed on the screen.



Forgotten Password STEP 2

Complete Challenge Response

what is my yougest daughter's name

Submit

An email will be sent to the email address associated with this SMART Click user ID containing instructions for resetting your password.

If You Forget Your User ID

1. Click **I forgot my User ID** on the SMART Click login screen
2. Enter your email address.
3. Enter the **Word Verification** characters shown
4. Click **Submit**.

An email containing your User ID will be sent to the email address on file.

Contact Information

Please contact the Customer Support Group at (312) 930-3444 for assistance with using on using the **SMART Click tool**.