Knotstone

Document Name & Type:	**Client Portal User Guide**
System(s) / Functional Area(s):	Client Portal, Apps and Tools
Brief Description:	A step-by-step guide on how to setup, access, and login to the Client Portal (and through it any available apps, e.g. *Market Trader™*).
Queries / Support:	support@knotstone.com
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Distribution:	• Clients • Operations • Dev-Ops / Sys-Admin

<u>Introduction</u>

This User Guide describes the steps required to setup, access and login to our Client Portal and any associated Tools or Apps available from the Client Portal such as the DMA platform *Market Trader™*. Access is browser[1] (web) based and compatible with the following devices and minimum system requirements:

System Requirements (Minimum)

Device Type	Operating System	Browsers
PC	Windows 10	Chrome 100 Edge 100 Firefox 102
MAC	OSX 10.14	Safari 16 Chrome 100 Firefox 102
ChromeBook	Chrome OS	Chrome 100
Tablet	iOS 16 Windows RT Windows 10 Android 10	Safari 16 Edge 100 Chrome 100
Smartphone	iOS 16 Android 10	Safari 16 Chrome 100

<u>Restrictions</u>

Access to our portal from countries that are restricted or sanctioned by us, any of our correspondents, or applicable regulatory authorities is strictly forbidden. All access to our systems is logged and monitored. Any unauthorised access or attempts to circumvent restrictions (including by the use of VPNs) may lead to suspension of your account.

<u>Prerequisites</u>

Before you can use our electronic client services, we must first enable you for such access by issuing you a username and linking it to the relevant accounts or services.

Once enabled for electronic services, you will receive an email with further instructions (see Section titled 'New Users' in this guide).

If you have not received a welcome email, please contact your Relationship Manager or email our <u>Support</u>

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[1] Private Browsing (Incognito) modes may not be compatible or supported by certain of our Client Portal tools or apps.

Existing Users

❶ Open a new browser tab or window and navigate to our website: www.knotstone.com

Once the page has loaded, click on the `Login` button on the top-right of the page (see Figure 1):

Figure 1
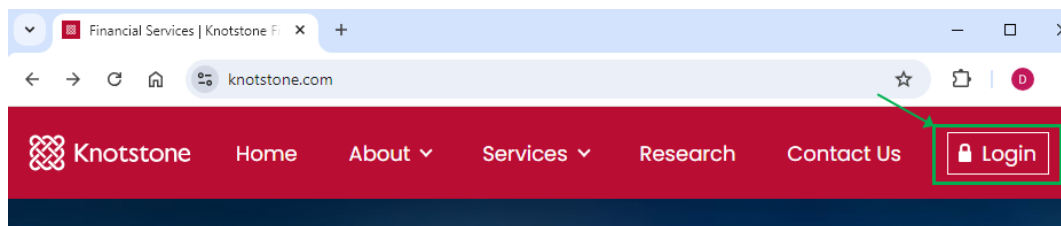
A new browser tab will open displaying the login page / window.

❷ In the **Welcome** window, enter your credentials (email and password) and Click `Continue`

Figure 2

Tip: For future convenience, you can access the Login screen directly by going to knotstone.com/login

❸ In the **Verify Your Identity** window, enter the Two Factor-Authentication (2FA) code via your previously chosen preferred 2FA method (Authenticator App or SMS) and click `Continue`

Figure 3

❹ Following a successful Authentication (via either the App or SMS), you will have now logged into the Client Portal and your available Electronic Portal Services (shown as Tiles) are accessible by clicking on the respective `LAUNCH` button. Each App will open in a new browser tab.

Figure 4

Tip: *For your own safety, when finished using a Portal App or Service (e.g. Market Trader) and closing its browser tab, please also logout from the Client Portal itself by clicking on the* `LOGOUT` *button on the top right.*
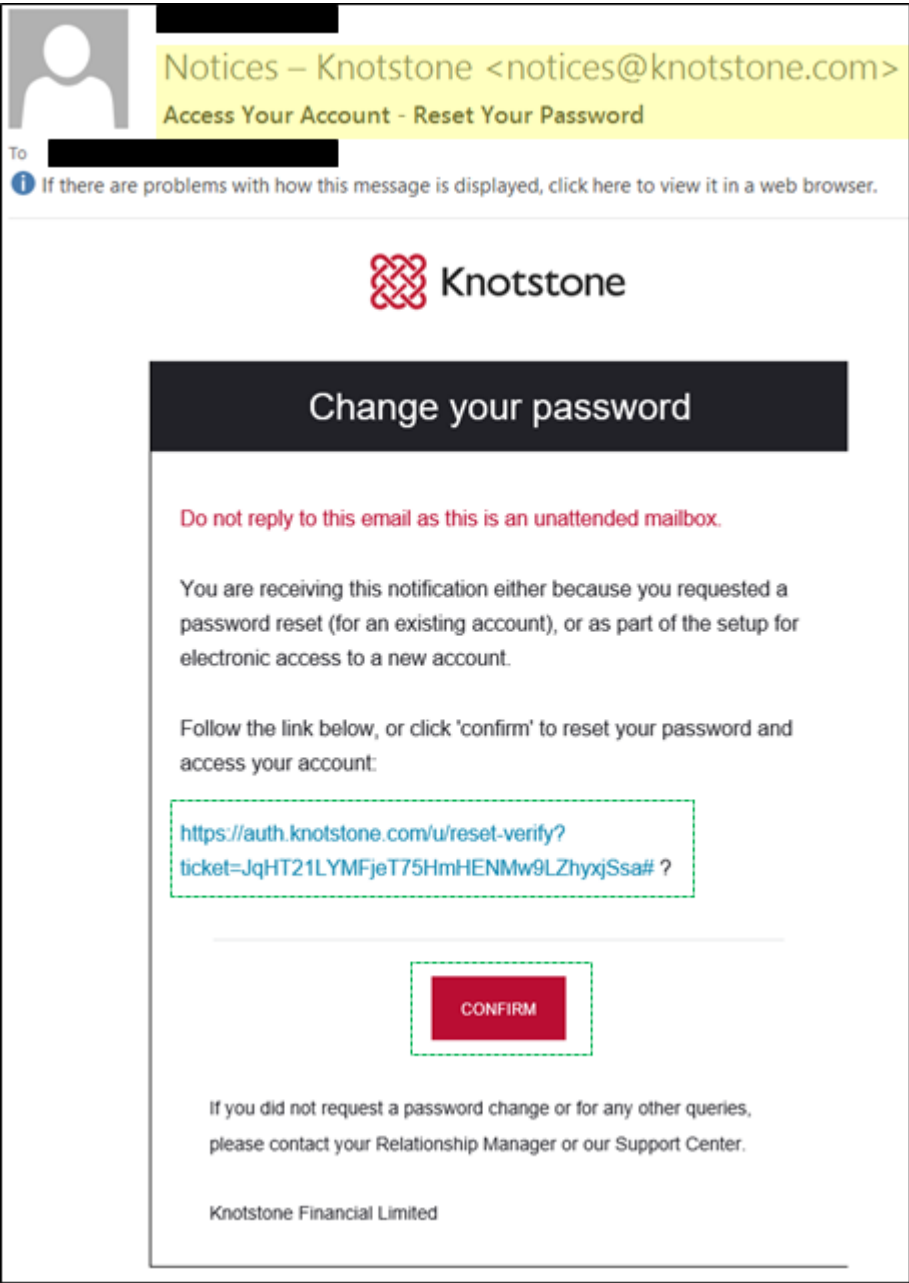
New Users

❶   New users will receive an email with instructions (see Figure 5).

Figure 5

Tip: No email in your inbox? Check your spam/junk folder in case it was misplaced there. If so, mark the email not junk and white label our domain (knotstone.com) to avoid missing such notification emails.
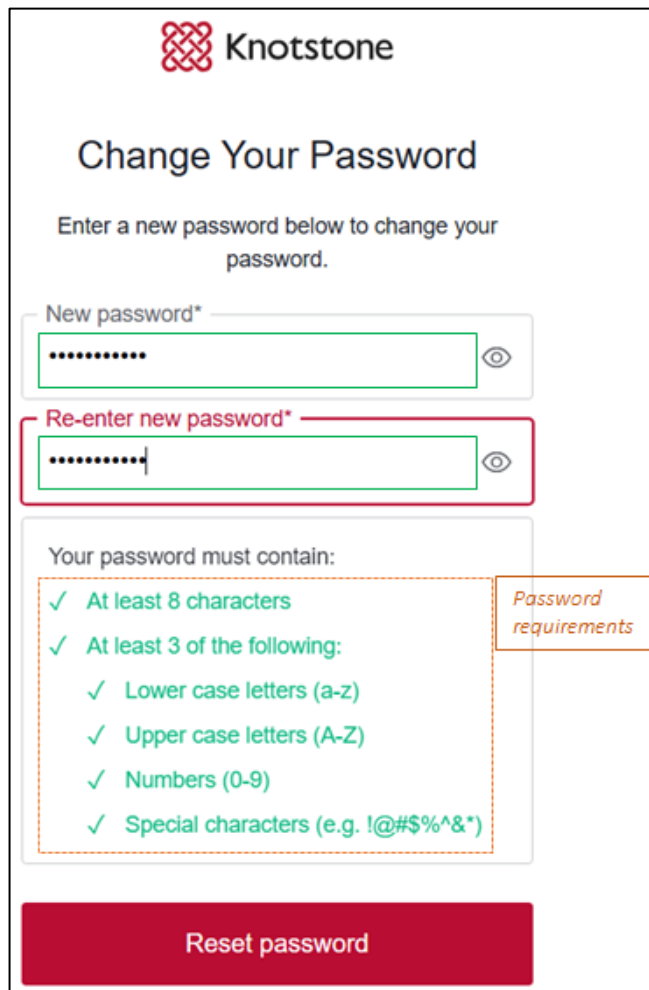
Click on the hyperlink or the **CONFIRM** button.

A new browser tab/window will open with a **Change Your Password** prompt.

New Users - continued

❷ In the window titled **Change Your Password** enter a new password (noting the minimum password requirements shown), re-enter the new password and click the Reset password button.
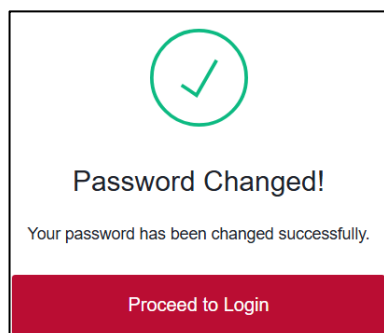
Figure 6

❸ In the pop-up window, click the Proceed to Login button.

Figure 7

New Users - continued

❹ In the window titled **Keep Your Account Safe**, select your preferred Two-Factor-Authentication (2FA)[2] method: an Authenticator App on your mobile phone or via SMS.
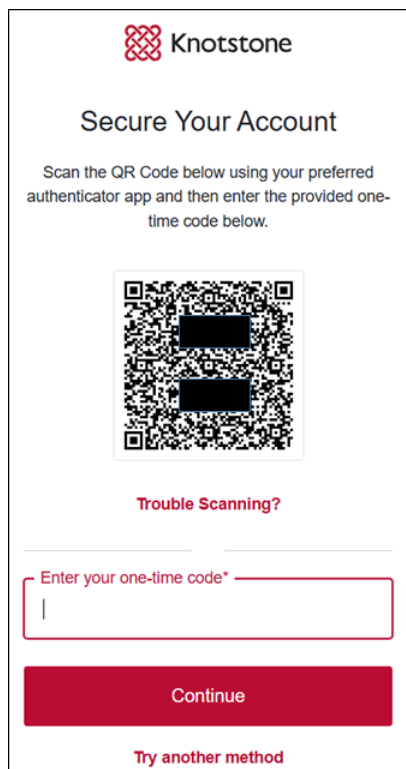
Figure 8
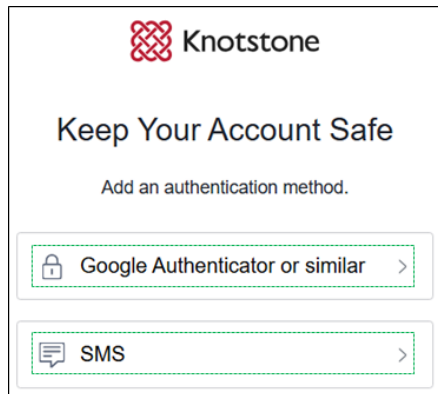
After selecting an authentication method, a window titled **Secure Your Account** will open.

❺ Using **Authenticator App** (as 2FA method)

Open your Authenticator App, follow the instructions in the window titled **Secure Your Account** (scan the QR code and enter the one-time code), and click Continue

Figure 9

Tip: If you accidentally selected Authenticator App as your chosen 2FA method (but intended wanted to use SMS instead), click Try another method and you will be taken to the previous screen.

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[2] Two-Factor-Authentication (2FA) is a mandatory requirement for all our Electronic (Portal) Services.
We support 2FA through any Authenticator App on a smartphone (e.g. Google, Microsoft, Duo) or via SMS to your mobile phone.
If you do not have an Authenticator App and wish to use one for 2FA, navigate to your phone's App Store and download one.

New Users - continued

❻ Using **SMS** (as 2FA method)

In the window titled **Secure Your Account** select the country code of your mobile phone, enter your mobile phone number and click Continue
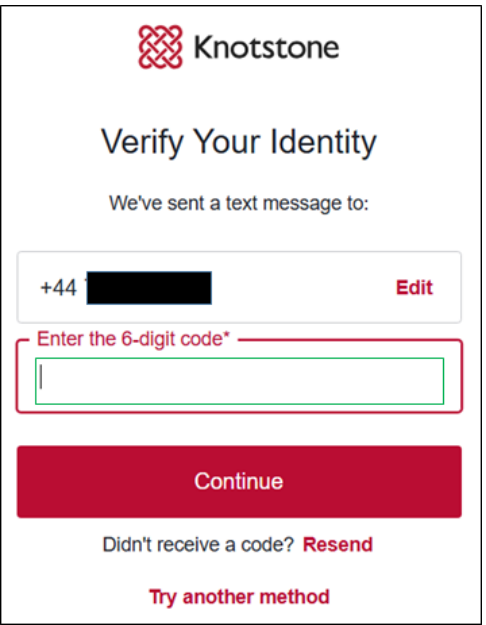
Figure 10

Tip: *If you accidentally selected SMS as your chosen 2FA method (but intended to use an Authenticator App instead), click* Try another method *and you will be taken to the previous screen.*

In the window titled **Verify Your Identity** enter the one-time code received by SMS and click Continue
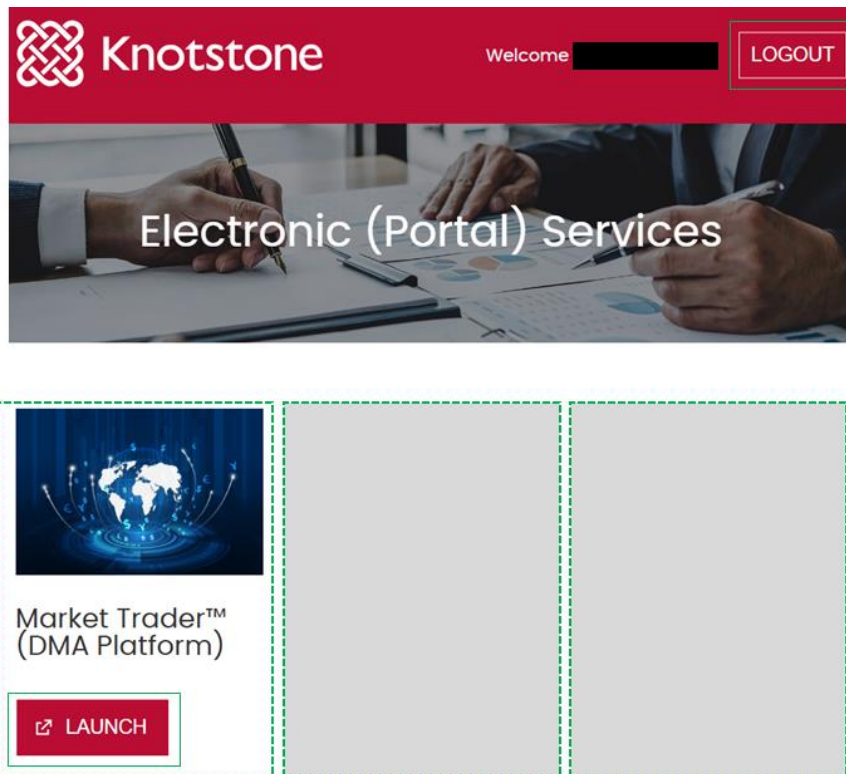
Figure 11

New Users - continued

❼ Following a successful authentication (via either the App or SMS), you will have now logged into the Client Portal and your available Electronic Portal Services (shown as Tiles) are accessible by clicking on the respective `LAUNCH` button. Each App or Service will open in a new browser tab.

Figure 12

Tip: For your own safety, when finished using a Portal App or Service (e.g. Market Trader) and closing its browser tab, please also logout from the Client Portal itself by clicking on the `LOGOUT` button on the top right.