

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. <i>Market Trader™</i>).
Queries / Support:	support@knotstone.com
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Distribution:	<ul style="list-style-type: none"> • Clients • Operations • Dev-Ops / Sys-Admin



Introduction

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 browser¹ (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

Restrictions

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.

Prerequisites

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).

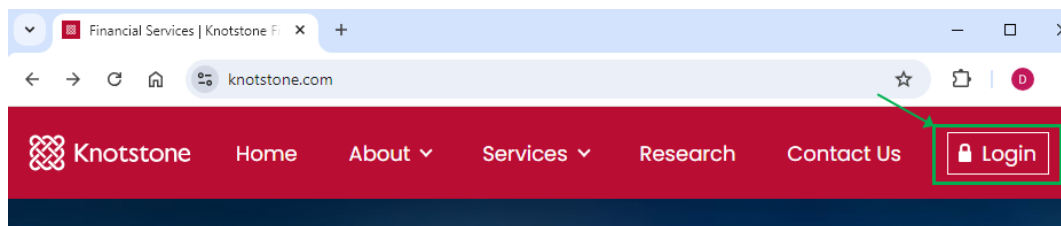
If you have not received a welcome email, please contact your Relationship Manager or email our [Support](#)

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

Existing Users

- 1 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.

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

Figure 2


A screenshot of the Knotstone 'Welcome' login page. The page features the Knotstone logo at the top, followed by the heading 'Welcome' and the instruction 'Enter your login credentials to continue:'. Below this are two input fields: 'Email address*' and 'Password*'. The 'Password*' field includes a toggle icon (an eye) to switch between visible and hidden states. A link labeled 'Forgot password?' is positioned below the password field. At the bottom of the form is a large red button labeled 'Continue'.

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

- 3 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

Authenticator App

 **Knotstone**

Verify Your Identity

Check your preferred one-time password application for a code.


Enter your one-time code*

☐ Remember this device for 30 days

Continue

Try another method

SMS

 **Knotstone**

Verify Your Identity

We've sent a text message to:

XXXXXXXXXX

Enter the 6-digit code*

☐ Remember this device for 30 days


Continue

Didn't receive a code? Resend


Try another method

4 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

 **Knotstone** Welcome [redacted]

LOGOUT



Electronic (Portal) Services



Market Trader™
(DMA Platform)

LAUNCH

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.

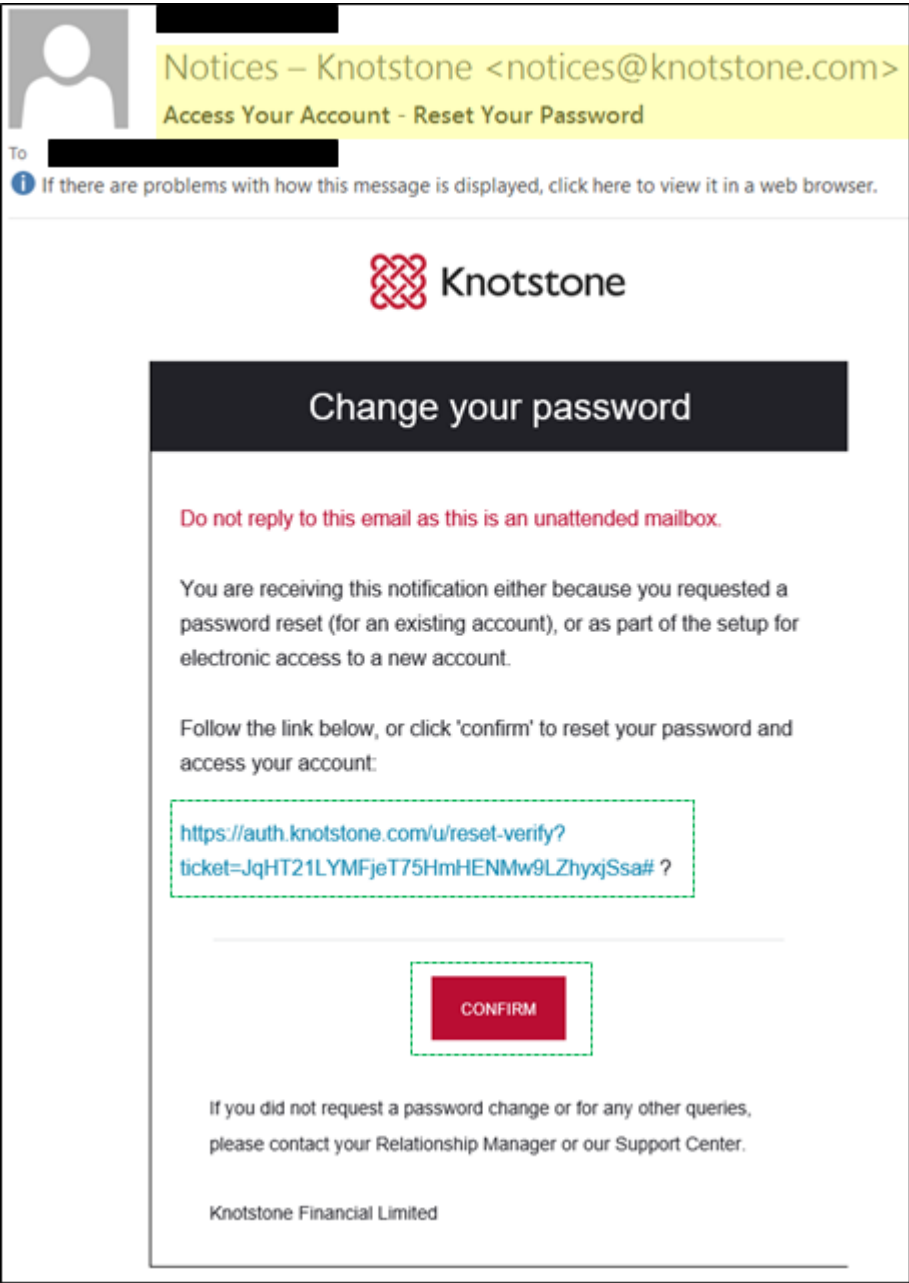
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New Users

- 1 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.

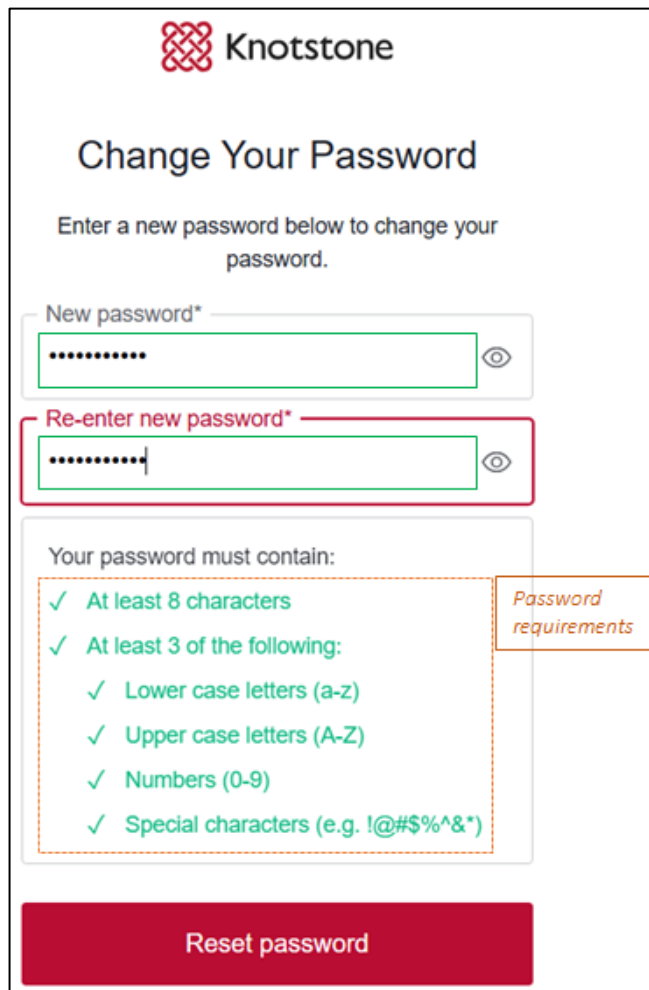
Click on the [hyperlink](#) or the **CONFIRM** button.

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

New Users - continued

- 2 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.

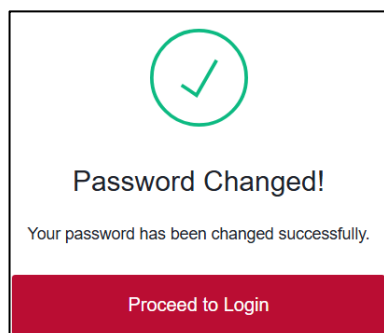
Figure 6



The screenshot shows the 'Change Your Password' interface. At the top is the Knotstone logo. Below it is the title 'Change Your Password' and a prompt: 'Enter a new password below to change your password.' There are two password input fields: 'New password*' and 'Re-enter new password*'. The 'Re-enter new password*' field is highlighted with a red border. Below the fields is a section titled 'Your password must contain:' with a list of requirements: 'At least 8 characters', 'At least 3 of the following:' (which includes 'Lower case letters (a-z)', 'Upper case letters (A-Z)', 'Numbers (0-9)', and 'Special characters (e.g. !@#\$%^&*)'). This list is enclosed in a dashed orange box, and a label 'Password requirements' points to it. At the bottom is a red button labeled 'Reset password'.

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

Figure 7

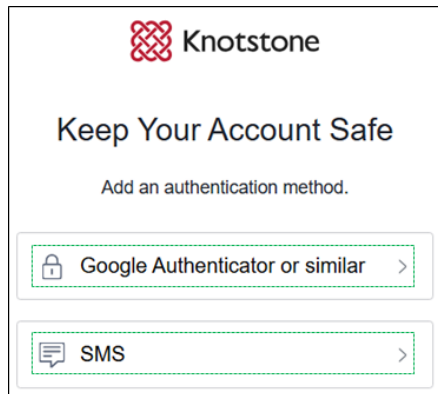


The screenshot shows a confirmation pop-up window. At the top is a green checkmark icon inside a circle. Below it is the title 'Password Changed!' and a message: 'Your password has been changed successfully.' At the bottom is a red button labeled 'Proceed to Login'.

New Users - continued

- 4 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

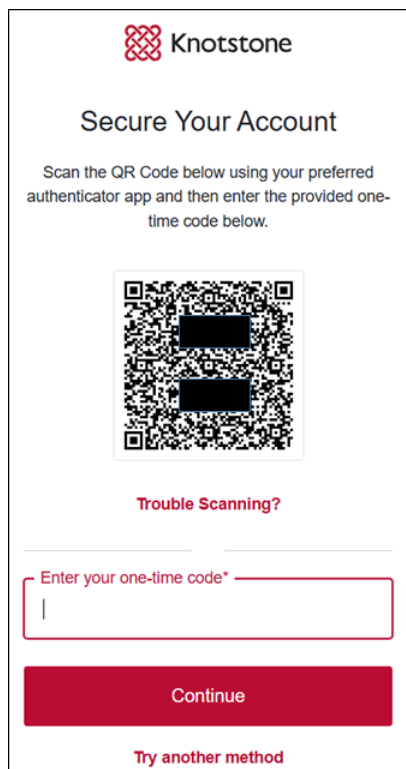


After selecting an authentication method, a window titled **Secure Your Account** will open.

- 5 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.*

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

6 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**

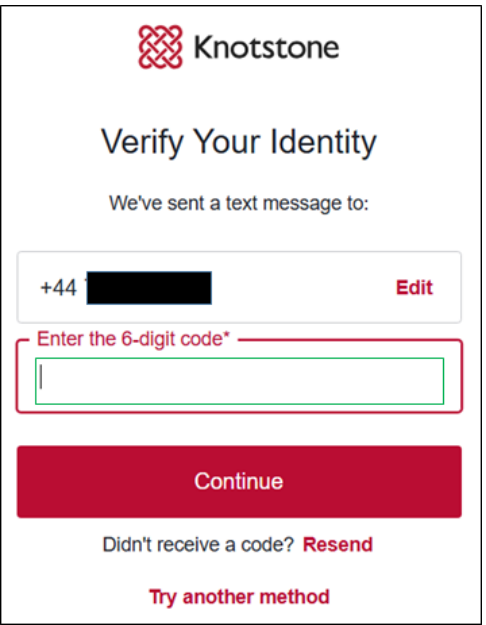
Figure 10



*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**

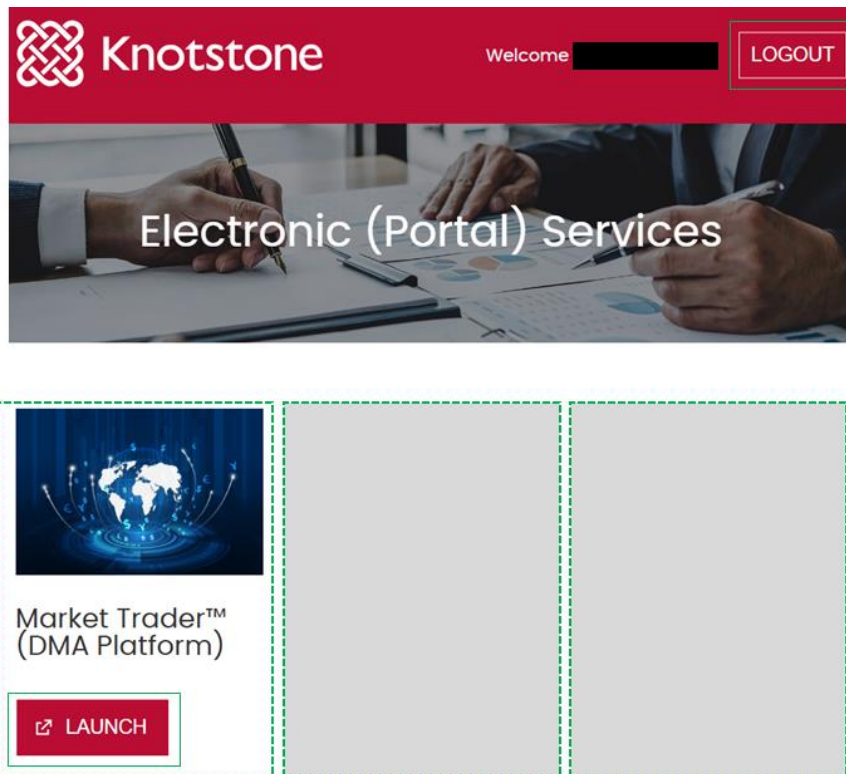
Figure 11



New Users - continued

- 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.*