Xero Integration Instructions

Steps to Enroll in Treasury Central Connect:

1. Activate your **Treasury Central Connect** profile. The activation email will come from *TCNoReply@stifelbank.com* and contain your permanent username and a temporary password. The activation link will expire 24 hours after it is generated by the Bank.

2. Select the appropriate third-party application once in the Treasury Central Connect system.

3. Select the accounts you wish to consent for the third-party application.

4. Click **Submit**.

5. Click **OK** after reading the Bank Feeds message.

6. Click **Finish**. At this point, you are ready to connect to Stifel Bank in your third-party application.

7. If you wish to make any edits to your consented accounts, you will be able to log back into Treasury Central Connect via a link available in the dashboard within Treasury Central.

Steps to Connect to Xero:

1. Log in to Xero.

2. In the **Accounting** menu, select **Bank Accounts**.

3. Click **Add Bank Account**.

4. Search for **Stifel Bank - Commercial Banking**.

5. Click **Login & Connect Accounts**.

6. Click **Continue**.

7. Enter your **Treasury Central Connect User ID** and **Password**. Do not use your Treasury Central credentials.

8. Click **Sign In**.

9. Select the appropriate organization. Click **Allow Access**.

10. Select the **Import Transactions** date and then select the appropriate organization and Xero account for each of the **Stifel Bank Accounts** you wish to connect. You can also set up a new Xero account as part of this step. Click **Continue**.

11. Review the information displayed on the confirmation screen. Click **Continue**.

12. Click **Close**. You will then be redirected back to Xero.