Connectivity Powered by Plaid

Connect your Stifel Bank business accounts to any application powered by Plaid, except for applications that Stifel Bank offers direct connectivity to, such as Xero and Sage Intacct.
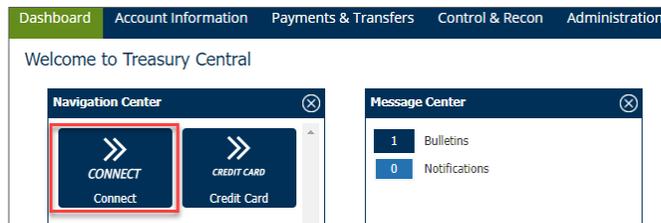
To Enroll in Treasury Central Connect:

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

2. Select **Plaid** once in the Treasury Central Connect system.

3. Select the accounts you wish to consent for **Plaid**.

4. Click **Submit**.

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

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

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

To Entitle Your Accounts to Plaid in Treasury Central Connect:
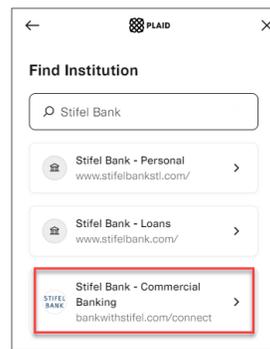
If you already have Treasury Central Connect credentials, simply log into the Connect portal and entitle your accounts to Plaid.

To access the Connect portal, log into Treasury Central and click on the **Connect** button shown in the Navigation Center on the Dashboard.

To Connect to Applications Powered by Plaid:

1. Follow the process to connect an external account provided by the third-party application.

2. When you reach the Plaid search menu, search for Stifel Bank and select **Stifel Bank - Commercial Banking**.

3. Enter your **Treasury Central Connect User ID** and **Password** when prompted. Do not use your Treasury Central credentials.

4. Follow the onscreen prompts to complete the connection process.