STIFEL | LOAN PORTAL

USER GUIDE

Your simple guide to **accessing your Account**, including Loan Balances, Statements, and other key loan information

Updated: **October 2024**

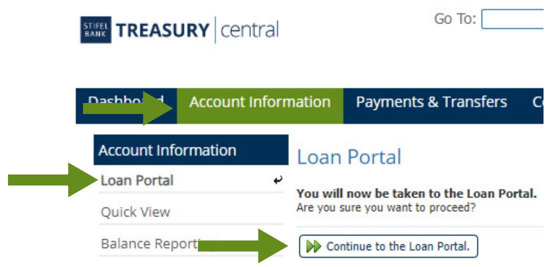
LOGGING IN

1. **Access** the **Stifel Loan Portal** through your Treasury Central Account

2. Click the "**Account Information**" tab

3. Click the "**Loan Portal**" option

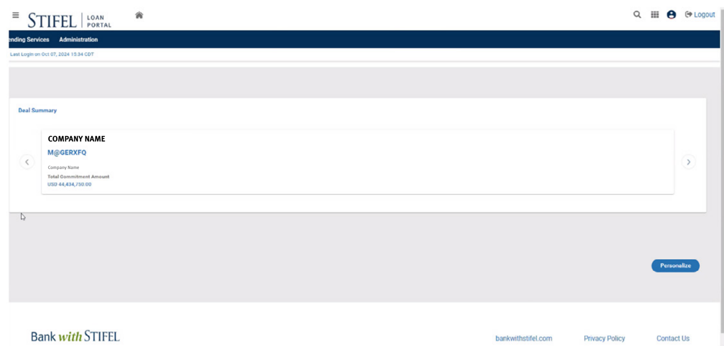
4. Click the "**Continue to the Loan Portal**" button



5. Upon successful login, a new **Dashboard** will appear (right)

   *Currently, the following functionality is available in Loan Portal:

   1. **Viewing Outstandings**
   2. **Viewing Statements**



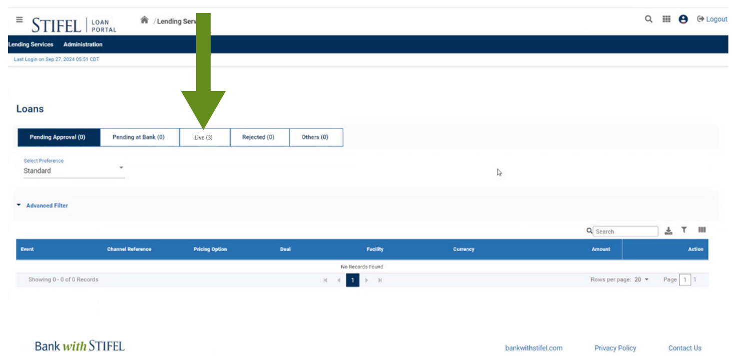
VIEWING **OUTSTANDINGS**

1. Click on "**Lending Services**" in the top left corner of the screen and a dropdown menu will appear (right)

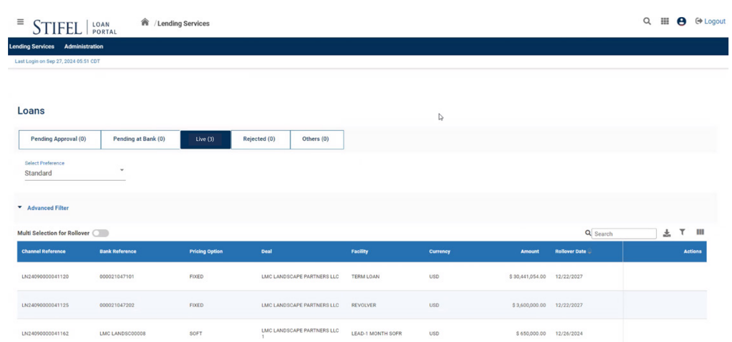
2. Select "**Loans**" from the dropdown menu

3. After selecting "Loans," you will be taken to the **Loans screen** (right)

4. Click on the "**Live**" tab in the middle of the screen



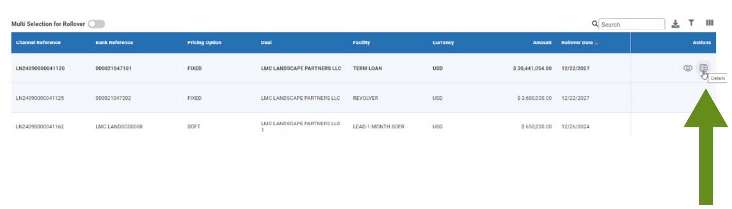
5. After clicking the "Live" tab, all of the **Loan Outstandings will appear** (right)



6. Determine the outstanding that you would like to review and **move the cursor to the right side of the line item under the "Actions" column**

7. As you **hover in that area**, two icons will appear – the first is an **Eyeball for a brief summary** and the second is a **Notepad for in-depth details** (right)

8. To view the details of the outstanding, **click the Note Pad/Details icon**



VIEWING **OUTSTANDINGS**

9. After clicking the Details icon, the Details screen will appear (right)

*The Details screen contains the following tabs:

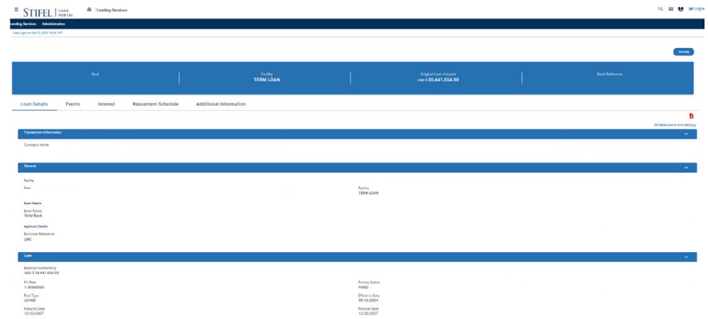
Loan Details: provides the details of the outstanding

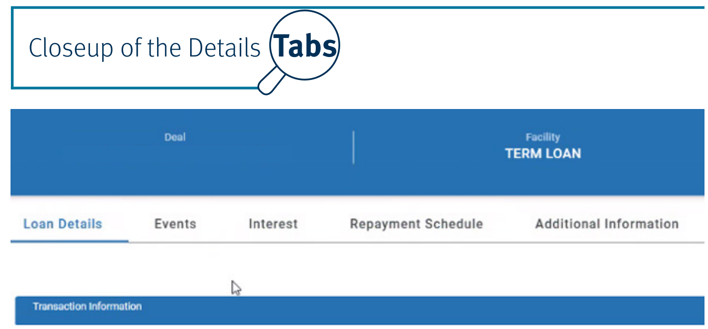
Events: High level transaction history

Interest: Shows the rate, the interest cycle and the amount and due date of the next interest payment

Repayment Schedule: If there is a repayment schedule associated with this outstanding, it will show in this screen

Additional Information: this tab is not being used at this time





10. Lastly, if you select the **Adobe Acrobat icon** in the middle right side of the screen, a **document summary of the outstanding will be generated** in Adobe Acrobat

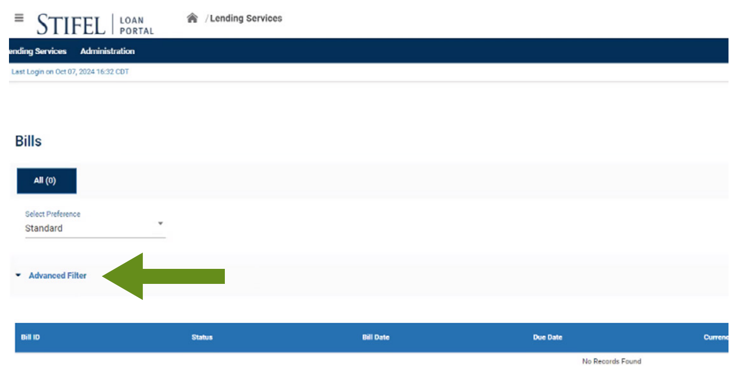
VIEWING **BILLS**

1. **Click the "Lending Services" option** on the top left of the screen and then **use the drop down to select "Bills"** option

2. After selecting "Bills," you will be taken to the **Bills screen** (right)

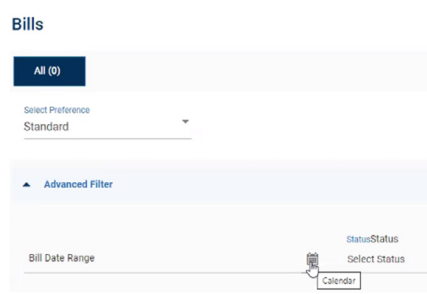
   ***Note that this screen does not show any bills at first** – to see bills **the user needs to use filters to locate and review bills**

3. Select the "**Advanced Filter**" option on the left of the screen



4. Next, the **User must select a calendar date range**, which is done in 3 steps.

5. Click the **Calendar icon** in the Bill Date Range section (right)

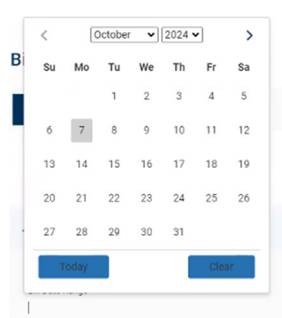


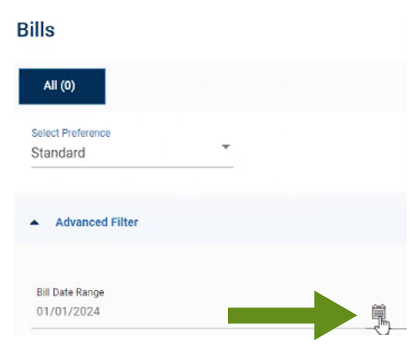
6. A **calendar box** will appear (right 1)

7. Select the **starting date** for the date range using the drop down calendar buttons

8. Once the User has selected the start date, the **start date will show in the Bill Date Range**

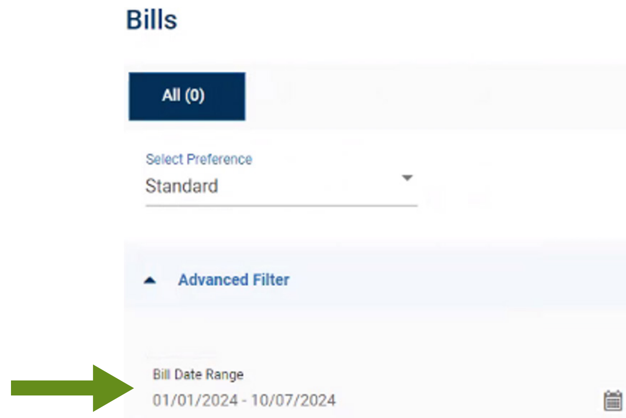
9. **Select the Calendar icon again** (right 2) to bring up the calendar and **select the end date**



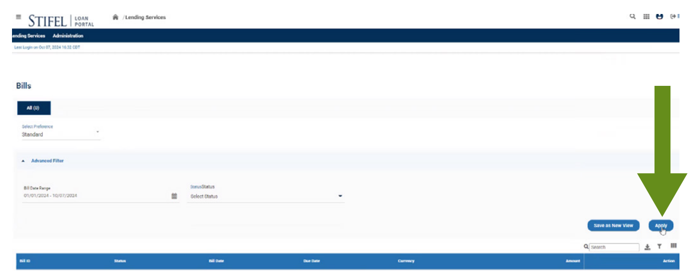


VIEWING **BILLS**

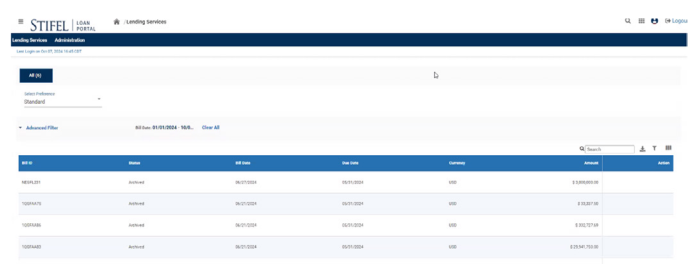
10. After selecting the End Date, **the full Date Range will show** in the Bill Date Range field (right)



11. Select the "**Apply**" button in the lower right of the screen (right)



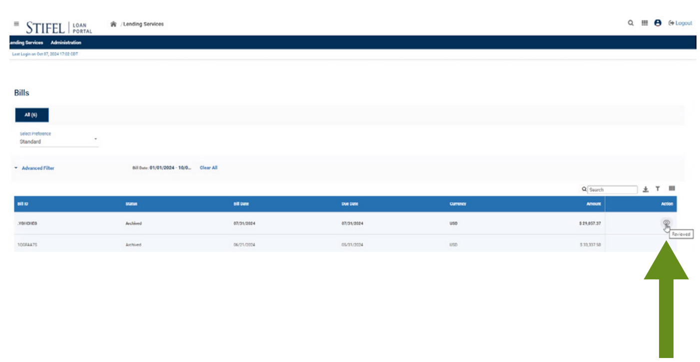
12. This pulls up a **view of all bills within the Calendar Date Range** selected (right)



13. The User can review the details of a bill by **moving the cursor over to the Action column on the right**

14. After moving the cursor and hovering, **select the Eyeball icon that appears to view the Bill**

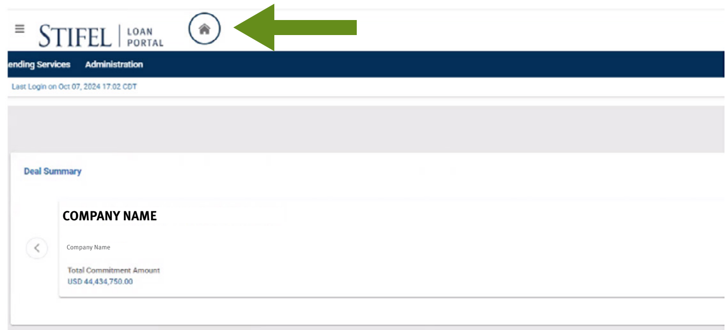
15. The Bill will **pop up in a separate window for further review**



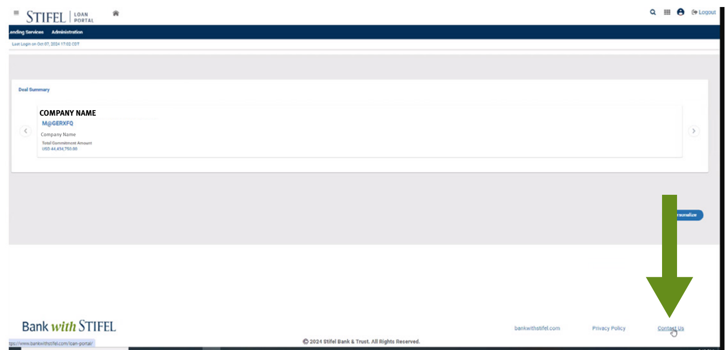
LOAN PORTAL **ASSISTANCE**

1. If you need help or have questions about Loan Portal, **please feel free to reach out to your Relationship Manager or you can use the following steps to contact us via email:**

2. Click the "**Home**" **icon** on the Dashboard page



3. Click the "**Contact Us**" option in the bottom right of the screen



4. **Fill in the details** of your request and **click the** "**Start a Conversation**" button and your inquiry will be submitted to Stifel Loan Portal Support and they will respond to your request