

Borrower Portal

Elevate your borrowers' experience with a secure borrower communication platform that replaces email with real-time transparency for loan documentation.

Clear, auditable communication between agents and borrowers is crucial to compliance and the efficiency of the loan lifecycle. When this communication relies on email, it creates delays and increases financial and regulatory risk.

Borrower Portal is a secure, auditable platform designed to transform borrower interactions by providing a single gateway for communication and documentation.

It enables borrowers to access loan documentation, communicate directly with the agent, and control every aspect of the borrower experience throughout the loan lifecycle.

Borrower Portal enables agent banks and asset managers to reduce inefficiency, improve auditability, ensure compliance, and deliver an intuitive experience to their borrowers.

Key features



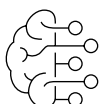
Single communications portal

Transform borrower interactions by replacing manual processes with a single interface that centralizes loan information, communication, and documentation.



Intuitive, real-time interface

Accelerate and enhance access to loan information for borrowers by providing real-time loan details, payment schedules, and status updates that give them deeper visibility into their financial commitments and greater confidence in managing them.



AI-powered data extraction

Extract specific credit agreement data points in seconds to create new deal set-up, deal events and covenants that drive automated workflows and STP into WSO Agent.



Secure, auditable portal

Reduce email security risks and establish a clear, time-stamped audit trail that tracks all communication between agents and borrowers and enhances transparency across the loan lifecycle.



Native integration

Integrate borrower communications into a broader, AI-powered loan workflow, including our WSO Agent and Debtdomain solutions.

Benefits for Borrowers

Elevate your borrowing experience with a single portal that manages your data and documents, monitors cashflows, tracks trades, and automates asset workflows.

An intuitive design, real-time insights, and direct communication with the agent enhances transparency, simplifies complex processes, and gives you greater visibility and control throughout the loan lifespan.

Key benefits include:

- **Single portal:** Eliminates the inconvenience of using multiple systems to manage all aspects of your loan, including drawdown requests, lender holdings, liquidity data, and black-lists.
- **Direct channel of communication:** Replace multiple email chains with your agent(s), reduce delays and improve response times for inquiries and support.
- **Timely delivery:** Receive your loan details, payment schedules, and status updates in near real-time, so you can manage your financial commitments with confidence.
- **Loan admin automation:** Simplify complex loan processes, automate key actions, and minimize manual steps so you can stay on top of your obligations.

Landing page with multiple tasks and deals in different status:

The screenshot displays the S&P Borrower Portal interface. The top navigation bar includes the S&P logo, the text 'Borrower Portal', a search bar, and the date 'Thursday, April 30, 2026'. The main content area is divided into two columns: 'Tasks' and 'Your deals'. The 'Tasks' column lists four items, each with a title, agent, task type, and status (e.g., 'Submitted', 'Awaiting Submission', 'Returned to Borrower (Rejected)'). The 'Your deals' column is further divided into 'Pending deals (4)' and 'Active deals (4)', each listing deal titles, agents, and their current status (e.g., 'Ready for Review', 'Processing...', 'Awaiting Borrower Setup'). A footer at the bottom contains copyright information: '© 2026 S&P Global. All rights reserved. Reproduction in whole or part without permission is prohibited.'

Credit agreement data extraction view:

The screenshot displays the S&P Borrower Portal interface. At the top, the header shows 'S&P Borrower Portal' and the date 'Wednesday, May 27, 2026'. The main content area is titled 'Mar-26' and shows 'Agent: ClearPar Test Agent | MEI: US98220000'. A 'Global amount' of '\$ 120,000,000.00 USD' and 'Overdue tasks' of '0' are displayed in the top right. Below this, there are tabs for 'Tasks', 'Credit agreement', 'Bank deal', 'Revolving Credit ...', and 'Term Loan Facility'. The 'Credit agreement' tab is active, showing a 'Reference data' section with an 'Overview' table and a 'Term Loan Facility' section. The 'Overview' table lists details such as Bank deal name (Mar-26), Borrower (ClearPar test Borrower), Agent (ClearPar Test Agent), Credit date (Mar 10, 2026), Bank deal currency (USD), and Global amount (120,000,000.00). The 'Term Loan Facility' section lists Facility name (Term Loan Facility), Loan X (optional) (-), and Facility type (Term Loan). To the right, a large document viewer displays the 'CREDIT AGREEMENT' text, which includes details about the agreement's entry into force, facility structure (Term Loan Facility and Revolving Credit Facility), purpose, interest provisions, repayment terms, financial covenants, and reporting requirements.

Task audit trail covering multiple interactions:

The screenshot shows the S&P Borrower Portal interface with a 'Closing Date Term Loan' task. The header displays 'S&P Borrower Portal' and the date 'Thursday, April 30, 2026'. The main content area is titled 'December 2025' and shows 'Agent: ClearPar Test Agent | MEI: US98220000'. Below this, there are tabs for 'Tasks', 'Credit agreement', 'Bank deal', 'Closing Date Ter...', and 'Revolving'. The 'Closing Date Term Loan' tab is active, showing a 'Request Borrowing to acquire funds' task. An 'Audit history' modal window is open, displaying a timeline of interactions for the task. The audit history shows the following events: 'Task created' (Apr 30, 2026, 10:09 AM, Borrower), 'Task approved' (Apr 30, 2026, 10:09 AM, Borrower), and 'Task rejected' (Apr 30, 2026, 10:20 AM, Agent). The 'Reason for rejection' is 'Missing details'. The background shows the task details, including 'Reason for rejection*', 'Assignee: Borrower (You)', 'Task type: Borrowing request', 'Number of approvals required: 0 / 1', and 'Included documents' (BW Fee Letter.pdf).

Contact us for a demo of Borrower Portal

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