

Quick Reference Guide

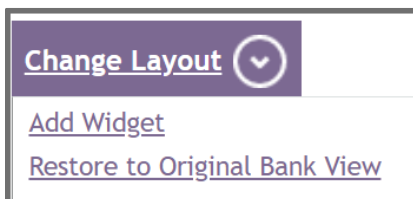
Truist Treasury Manager Customizing the Dashboard

The Treasury Dashboard is the default home page for the Truist Treasury Manager system. This page is highly customizable to provide you with a quick financial view of your account information, as well as shortcuts to common tasks. You can add widgets to your Treasury Dashboard to meet your needs. This document demonstrates the steps to customize some of the dashboard elements.

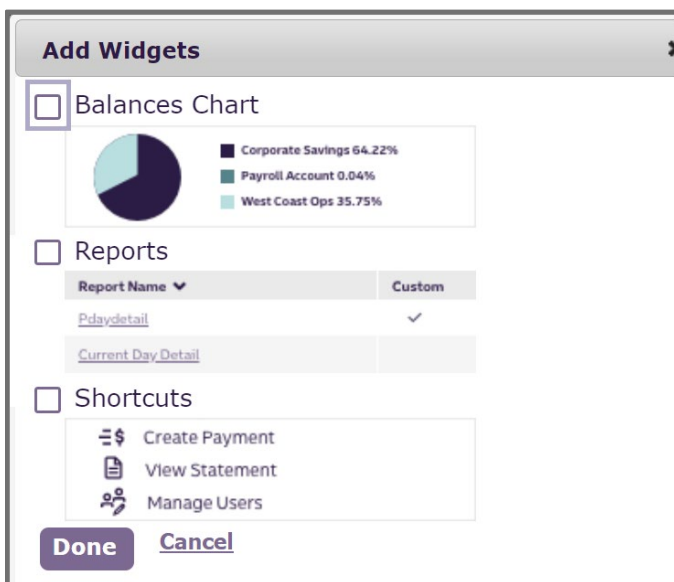
Customizing the Dashboard

To Add a Widget:

1. From the main menu, click **Treasury Dashboard**.
2. Click the **Change Layout** button, then click the **Add Widget** link.



3. From the Add Widgets page, select the checkbox for each widget you want to add to the Treasury Dashboard page.

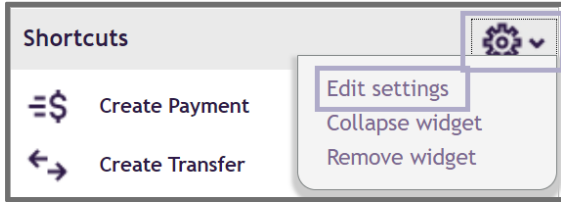


4. Click the **Done** button. The selected widget displays on the Treasury Dashboard.

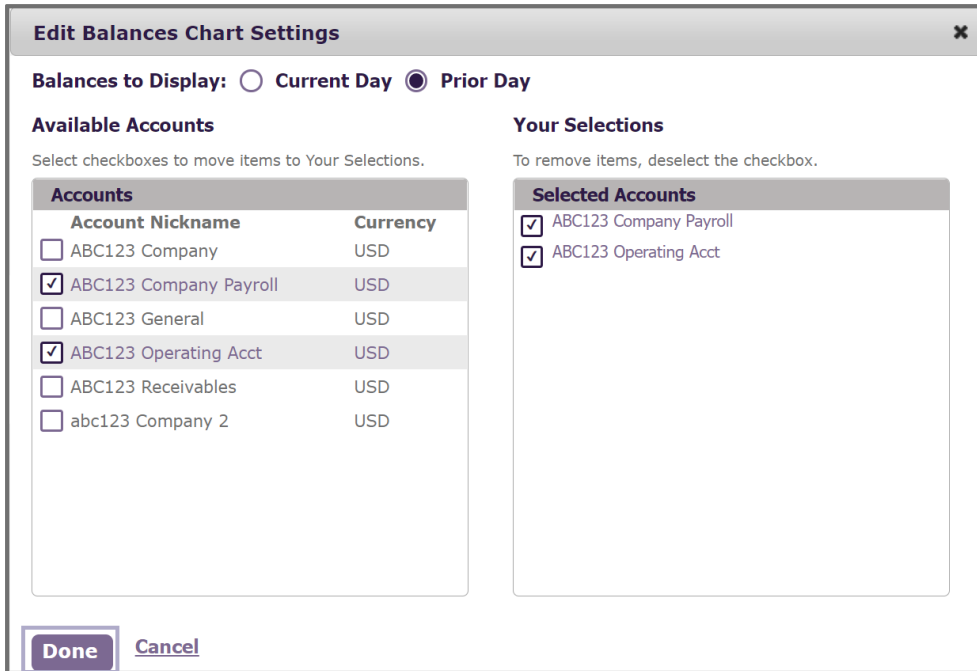
After the desired widgets are added, you can further customize the layout by clicking and dragging widgets around the screen.

To Customize Widget Displays:

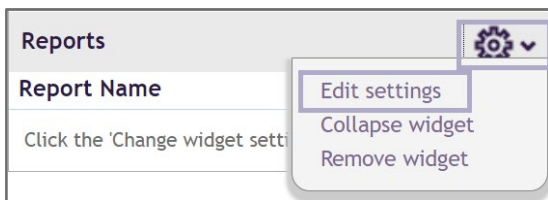
1. To customize the **Shortcuts** widget, click the **Change widget settings** icon.
2. Click the **Edit settings** link.



3. The **Edit Shortcuts Settings** window allows you to select which shortcuts display on the main screen. After selecting the desired shortcuts, click the **Done** button.
4. To customize the **Balances Chart** widget, click the **Change widget settings** icon.
5. Click the **Edit settings** link.
6. Select the **Accounts** you want to display on the chart, and select the **Balances to Display**: either Current Day or Prior Day (the default is Prior Day).



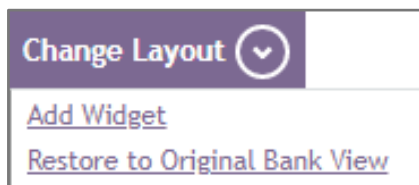
7. When you're finished selecting accounts, click the **Done** button.
8. To customize the **Reports** widget, click the **Change widget settings** icon.
9. Click the **Edit settings** link.



10. The **Edit Report Settings** window allows you to create links to specific reports, making them accessible directly from the dashboard. Click the **Standard** tab to display additional report options.
11. When you're finished selecting reports, click the **Done** button.

To Restore the Original Default View:

1. Click the **Change Layout** button, then click the **Restore to Original Bank View** link.



2. Click **Accept** on the confirmation window. The Treasury Manager Dashboard reverts to the original bank view layout.

Getting Help

Click the **User Materials** link at the top right of any page or visit the Treasury Manager page of the **Treasury Resource Center** at truist.com/treasuryresourcecenter to access reference materials.

If you need additional assistance, contact Treasury Solutions Client Services at treasuryclientservices@truist.com or **800-774-8179**. Representatives are available from 8 am to 8 pm ET, Monday through Friday on bank business days.