

WELCOME TO THE TMS PLATFORM

We are excited you have chosen Pegasus Bank to serve your Treasury Management needs. This guide will assist you with online enrollment.



GETTING STARTED | INITIAL LOGIN

- 1 Select the initial login URL from your enrollment email. This link directs you to the Treasury Management login page and will expire in 7 days.
- 2 Input the credentials provided and create a secure password. You will then be prompted to select and answer three security questions.
- 3 Depending on your company's setup for two-factor authentication, you will be prompted to either register your phone for one-time security codes, or register your security token.

SUBSEQUENT LOGINS

- 1 Please go to <https://www.pegasusbankdallas.com> and click the **Log In** button. From the drop-down menu, select **Treasury Management**. You will be automatically be redirected to a Login screen.
- 2 Input your Company ID, User ID and Password. Based on your company's setup, you will be prompted to input your security token or One-Time passcode.

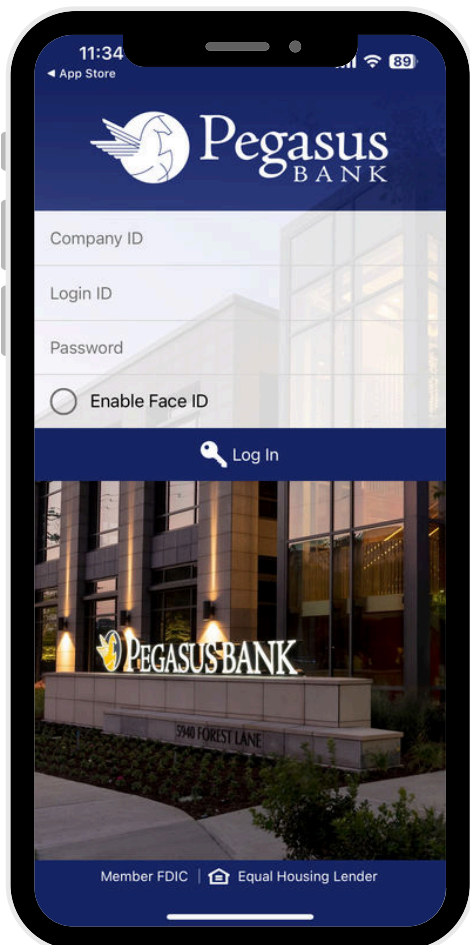


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TREASURY MANAGEMENT

HELPFUL HINTS

- To configure your Dashboard, select the Configure Dashboard button at the top right corner. You can change the position of the widgets by dragging and dropping, or resize the widgets using the arrow icon in the bottom right corner. Add additional widgets such as Favorite Reports or Payments Pending Approval by selecting Add a Widget.
- To set up your Notifications, click on your user ID in the upper-right-hand corner and select the Notification Setup option.
- To change the name(s) on your accounts, click on Admin in the toolbar. From here select Account Nicknames. *Note – Only Administrators will have this option.
- Want to change the order in which your accounts appear? Click on Manage Groups and drag and drop the accounts to their new location.
- Want to know how many or who can approve a transaction? Mouse-over the circle in the approval area for a list of possible approvers. Also, the number of circles indicates the number of approvers needed.



DOWNLOAD OUR MOBILE EXPERIENCE

Say hello to modern, seamless, and feature-rich functionality all in one mobile experience. Scan the QR Code and follow the below instructions to install.

Android

Select or enter the URL and when prompted, select “Install.”

If you are not prompted, simply tap the vertical ellipses, add to home screen, and select “Install.”

iPhone

To add the application to your home screen, select the “Share” icon at the bottom of the screen and then select “Add to Home Screen.”



Need additional help? Our Treasury Management Support team is just an email or phone call away. We're here to answer any questions or get you up and running.

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