



# Zelle® for your business Enrollment Guide

Follow these simple steps to get your business up and running with Zelle®.

Access Zelle®

Begin Enrollment

Choose Email Address  
or U.S. Mobile Number

Choose Default Account

Add Contacts

- 1 Access Zelle® via e-Treasury:** After working with your Relationship Manager to ensure your company and user are able to access Zelle®, log into e-Treasury. For e-Treasury Business Banking, click on Zelle® in the left column or e-Treasury, select the Payments & Transfers tab and click on Zelle®.
- 2 Begin Enrollment:** When you open Zelle®, you will see a series of screens explaining the benefits of Zelle®. Click the “Get Started” tab at the bottom of any screen.  
*PLEASE NOTE: Zelle® transactions (sent and/or received) will be displayed under the name of the individual enrolling on behalf of your company, rather than the company name itself. In addition, the individual’s name will be shown when others search for the e-mail or U.S. mobile number associated with the Zelle® profile for your company.*
- 3 Enroll either your email address or U.S. mobile number:** Others will use this to identify you when sending or receiving payments. The e-mail and U.S. mobile number associated with your e-Treasury profile will appear as choices to enroll. You may select one of these OR add others.
  - Only U.S. based mobile phone numbers are valid to use
  - If an email or U.S. mobile number are associated with a Zelle® profile you have at another Financial Institution, you may transfer it to your Webster Zelle® profile OR choose a different email or U.S. mobile number
  - A U.S. mobile number or email address can only be associated with one Zelle® profile, but you can have up to 5 linked to your Zelle® profile (each with a unique QR code to share)
  - Once you select your email address or U.S. mobile number, a 5-digit code will be sent to it for verification
- 4 Select a Default Account:** Select one of the bank accounts listed as your default account with Zelle®.
- 5 Receive Previous Pending Payments:** Any payments sent to you up to 14 days before enrollment will now display. (Pending payments greater than 14 days have been canceled and refunded.)
- 6 Receive Confirmation:** You will get a message congratulating you on successfully enrolling in Zelle®!
- 7 Add Contacts:** Choose trusted contacts to add to your Zelle® profile.
  - From the mobile app, you may select contacts from your U.S. mobile number or enter them manually
  - Once a contact has been successfully added, a confirmation message will appear and a purple Z logo will be displayed next to it indicating that it is a Zelle® ready contact
  - If the email address or U.S. mobile number you enter is not currently associated with a Zelle® profile, a message will inform you
  - If a contact’s email address or U.S. mobile number is successfully found to be associated with an enrolled Zelle® profile, but the name associated differs from the contact name you enter, a warning message will appear urging caution. You may continue and initiate payments, or you can edit the Contact Details to match
  - If you believe a contact may be enrolled under a different email address or U.S. mobile number, you can edit the Contact Details under Settings within Zelle®

You are now ready to send and receive money with Zelle®!



For more help, [view our set-up video >](#)



To help keep your account safe, visit the [Zelle® Pay it Safe Education Center](#)