

ZELLE® FOR SMALL BUSINESS ENROLLMENT GUIDE

You can quickly enroll in Zelle® by following the steps in this guide.

Before you begin

- On the web version of online banking, verify your mobile number is listed in the mobile number field.



AMERIS BANK

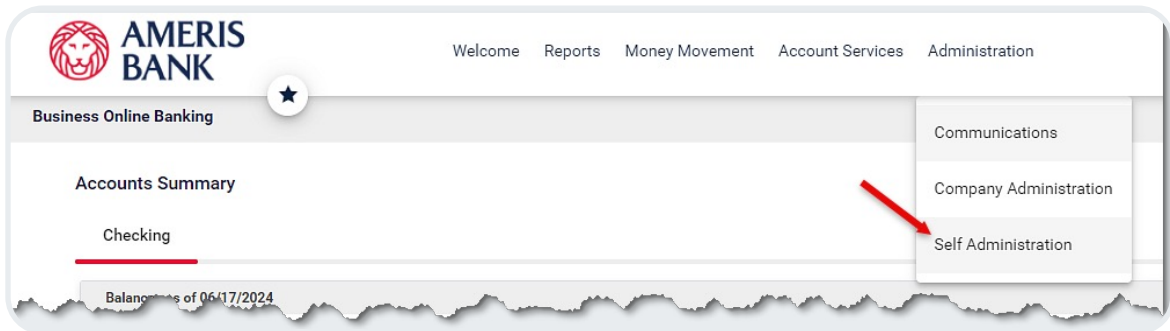


Before You Begin

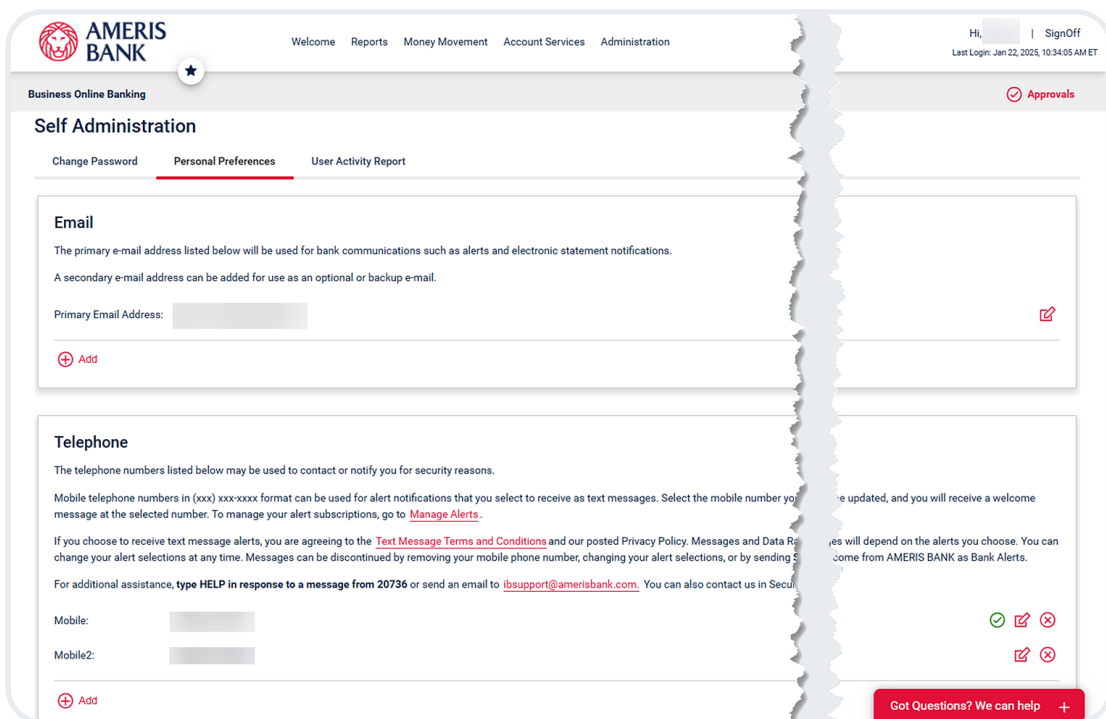
Verify Mobile Number and Email Address

Your active mobile number must be on record with Ameris Bank in the mobile number field to proceed. This does not need to be the number you give people to receive money, but it must be on record to set up Zelle. To view and update your mobile number and email address:

1. Log into online banking through a browser (not using the mobile app)
2. Click **Administration** then **Self Administration**



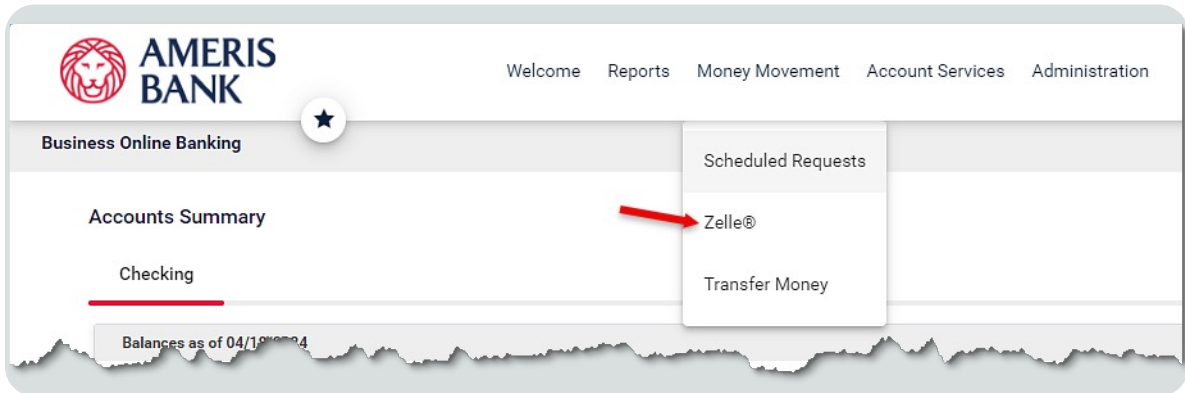
3. Click on **Personal Preferences**. Click the pencil edit icon to update your email or mobile number. Click the + to add a secondary email address or mobile number.



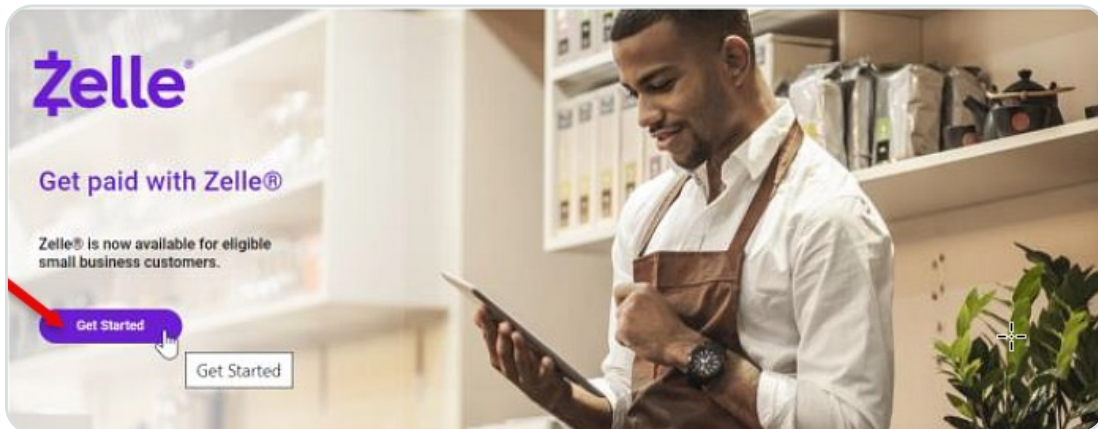
Enrolling in Zelle® for Small Business

After logging in to online banking, click to open the **Money Movement** menu, then select **Zelle®**.

Note: If you don't see Zelle® in this menu, an authorized signer for your account should contact a local branch or call us at 866.616.6020 to enable Zelle®. You will still need to follow these steps to activate Zelle® once it's enabled. Once Zelle appears, you will need complete the remaining steps in this enrollment guide.



1. Click the **Get Started** button to set the company's preferences, such as email, mobile number, and eligible account details.



2. On the **Select Zelle® Company Preferences** screen, verify your email address, active mobile number and eligible accounts, then click **continue**.

Select Zelle® Company Preferences
This page includes the email, mobile phone, and account options for initiating Zelle® enrollment. During enrollment you can choose whether to register an email, mobile number, or both.

1 Email Address Details

2 Mobile Number Details
A valid United States mobile number for a company administrator is required. During Zelle® enrollment you will have the option to register this mobile number, an email address, or both. To change your Mobile Number: [input field]

Next Previous

3 Eligible Account Details

Continue Cancel

3. Verify the company preferences when prompted, then click **Submit**.
4. Click **Continue to Enrollment**.

Verify Zelle® Company Preferences
Almost done. Please confirm the details below.

Email Address: [input field]

Mobile Number: [input field]

Accounts: [input field]

Submit Cancel

Zelle® Company Preferences Confirmation
Manage Zelle® Company Preferences

The Zelle® company preferences below have been submitted successfully.

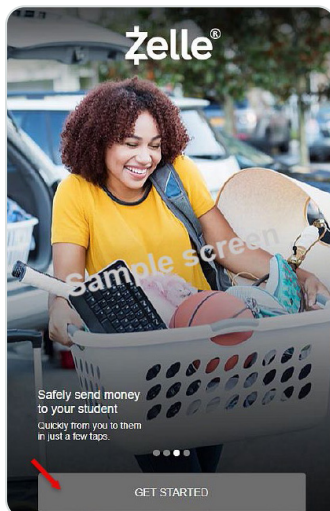
Email Address: [input field]

Mobile Number: [input field]

Accounts: [input field]

Continue to Enrollment

5. Click the next **Get Started** button to enroll in the actual Zelle® for Small Business application.



6. Select the phone number or email you'd like to use. This is how people who are sending you money will find you in the Zelle system. You must choose a unique email or phone number to receive money into this account. You cannot use the same number or email that you are using for Zelle at another bank or another account at Ameris. If you are already using your mobile number for another Zelle® account, we recommend using your business email address.

Then select the account you want to use to send and receive money.

7. You will receive an email or text with a 6 digit code. Enter the code you receive. Please allow up to 5 minutes to receive the email or text before clicking **resend code**.

8. Click **continue** to begin using Zelle.

Select the first email or mobile number you want to enroll to send and receive money.

999.555.2328

first.last@amerisbank.com

Select the primary account you want to use to send and receive money.

Checking *****2023

Checking *****7402

Send Money With Zelle® Cancel

Enter the 6-digit verification code sent to first.last@amerisbank.com so we can verify this is you.

526338 |

[Change_email](#) [Resend_code](#)

Send Money With Zelle®

Congratulations!

You're ready to send and receive money with:

first.last@amerisbank.com

You have no pending transactions
Next you'll confirm 999.555.2328
[No thanks, I'll confirm this later](#)

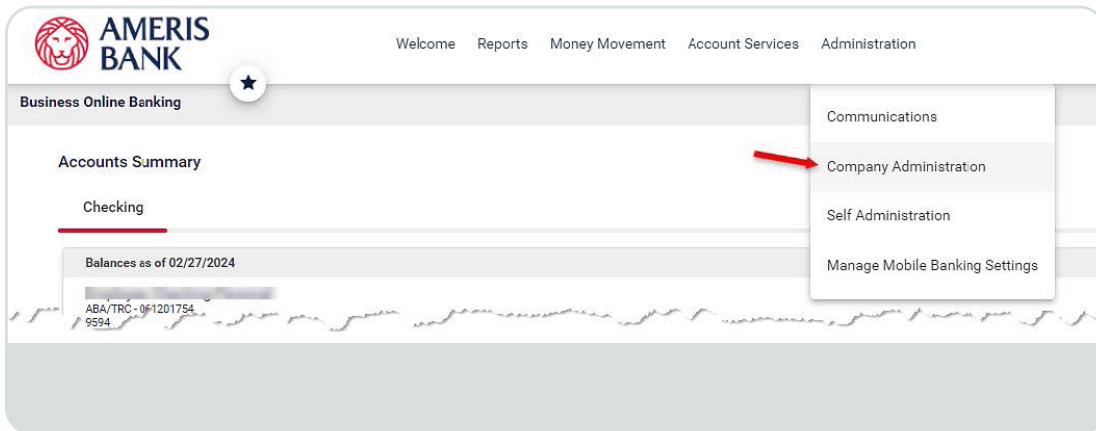
[Continue](#)

Designate Additional Company Users

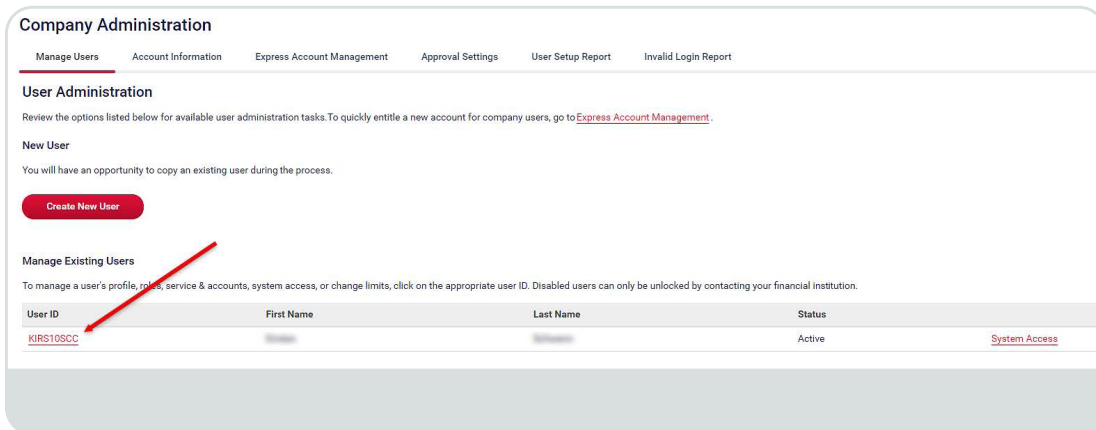
(completed by company admin via business online banking on a browser. This cannot be completed in the mobile app)

The company's administrator can designate others to use Zelle® for Small Business. All designated users in the company will use the same Zelle® for Small Business registration email and/or phone number to send and receive money.

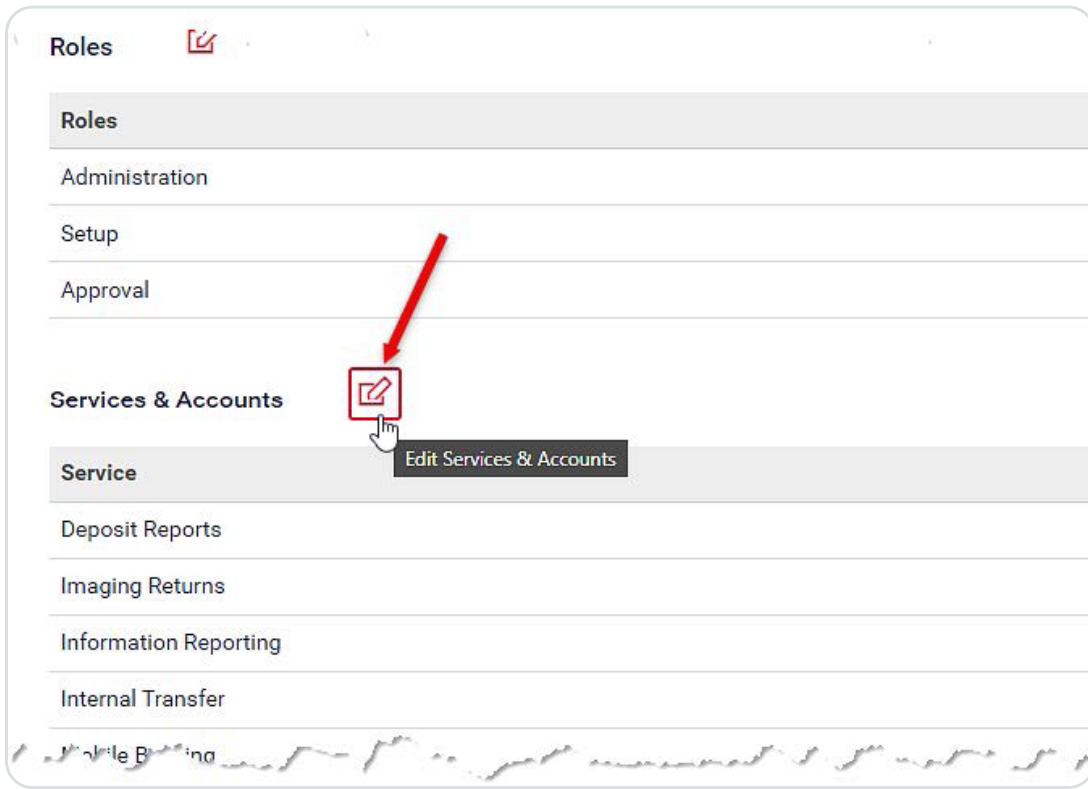
1. After logging in to business online banking, hover over the **Administration** menu, then select **Company Administration**.



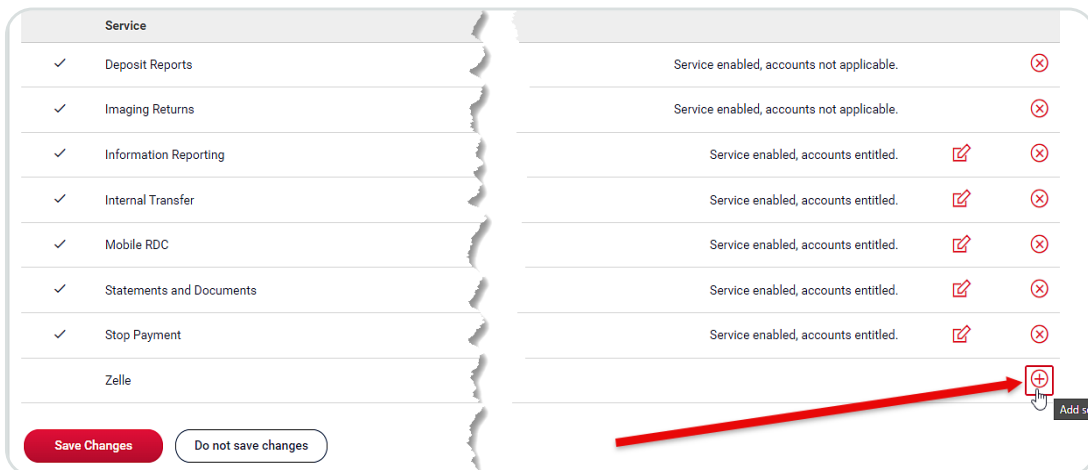
2. Click the link in the **User ID** column to access the user to whom Zelle® for Small Business will be assigned.



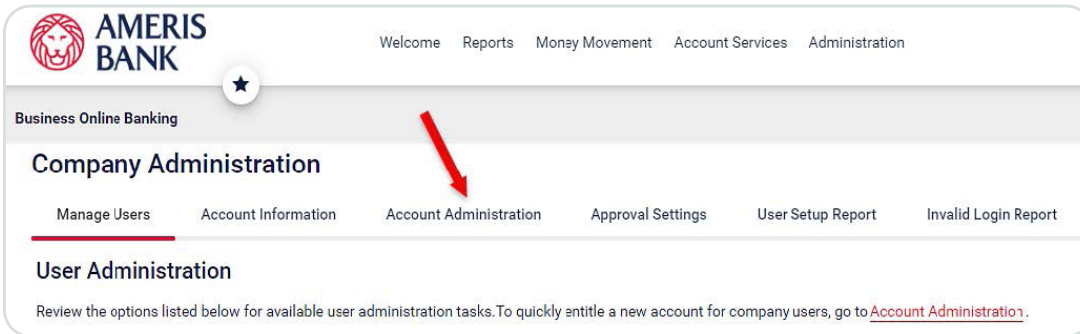
3. Click the **Edit** icon next to Services & Accounts.



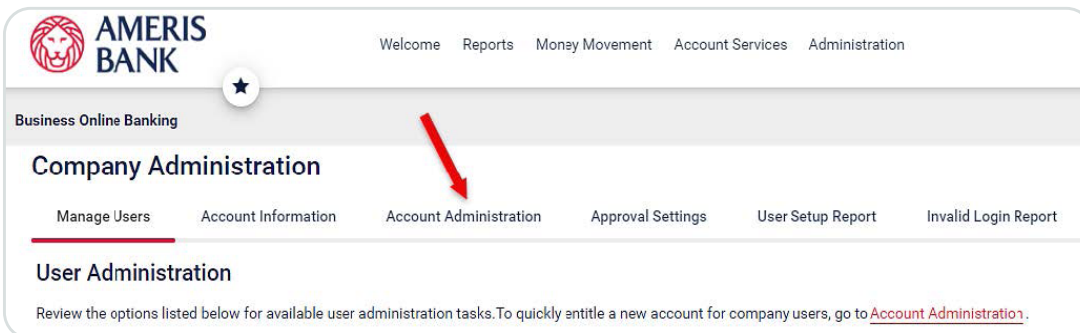
4. Click the **Add Service** icon next to Zelle®, then click **Save Changes**. Zelle® then appears in the Move Money menu on online banking or in the mobile app for use.



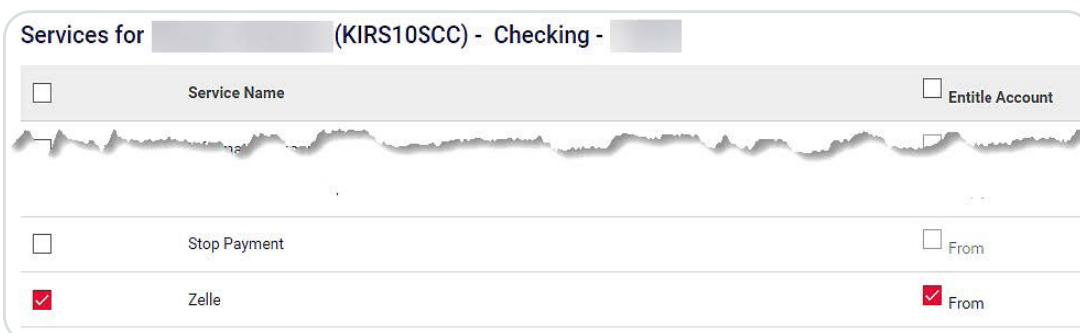
5. After adding the Zelle® service to the user, click the **Account Administration** tab to connect the user to an account.



6. Select the new Zelle® user and an account from the respective drop-down menus, then click **Go**.



7. Select **Zelle®** from the list of services, and check From to allow the user to send money from the account. Click **Save Changes**.

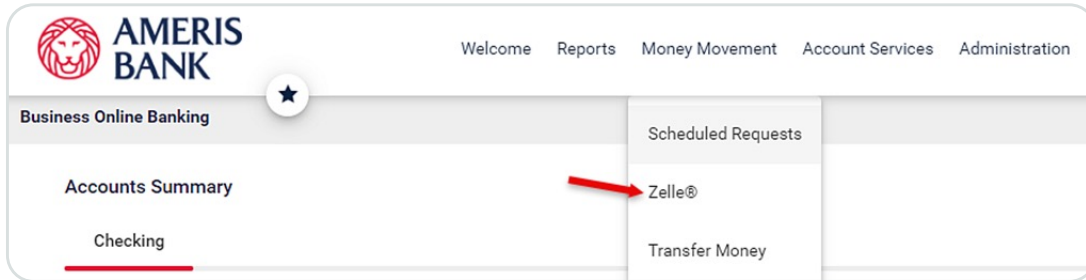


Change Preferences & Unenroll

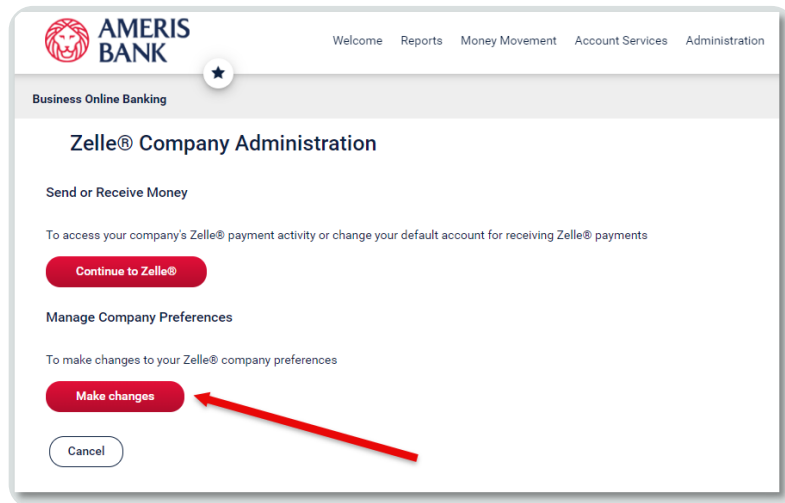
(completed by company admin via business online banking on a browser)

The company's administrator can update preferences via business online banking on a browser and unenroll from Zelle®. Additional users cannot complete these tasks.

1. After logging into online banking, click to open the **Money Movement** menu, then select **Zelle®**.



2. Click the **Make Changes** button, make edits as needed, and then click **Submit**.



Note: If unenrolling, the acknowledgment checkbox must be checked before submitting.

