

How to use Zelle to Donate to the Ferris Association

Zelle is a way to send and receive money from your financial account; you may use Zelle to make donations to the Ferris Association online.

You'll need:

- a **computer/tablet/phone with an internet** connection
- An **existing Zelle account** or be willing to set up a new Zelle account from your financial institution (bank, investment account, etc.)
- The **Ferris Association Zelle ID: secretary@charlesferris.org**

This guide includes several sections:

- Create a Zelle Account
- Add a recipient to Zelle
- Donate from Zelle
- Send money with Zelle using a QR code

Create a Zelle account: Please refer to your financial institution's directions for enabling your account to use Zelle. As each bank or other financial institution may have slightly different steps to follow to set up your account to send money with Zelle.

Reference materials from Zelle: The Zelle website has some good reference documents if you need help. But remember, your own financial institution may also have materials and FAQs for working with them specifically.

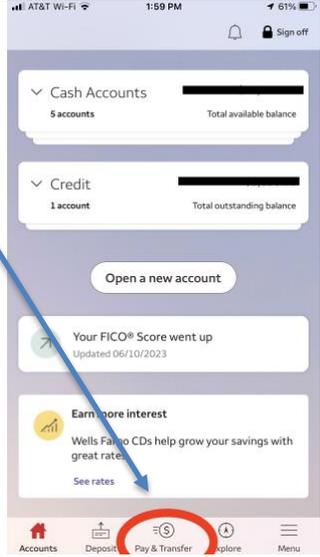
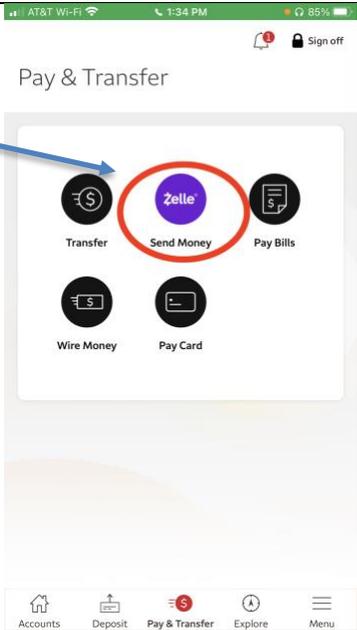
- How It Works: <https://www.zellepay.com/how-it-works>
- Zelle FAQs: <https://www.zellepay.com/faq/top-zelle-questions>

If you already use Zelle, you will need to set up the Ferris Association as a recipient in your Zelle account.

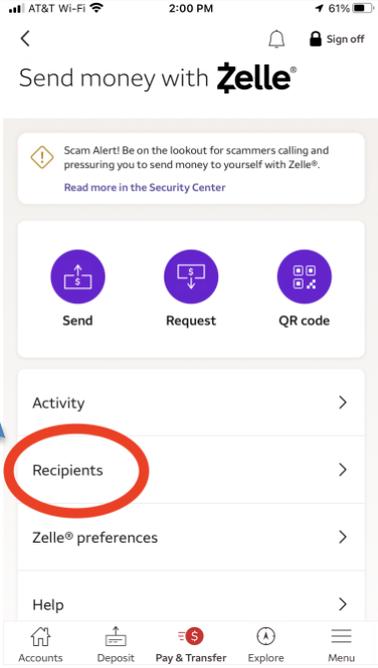
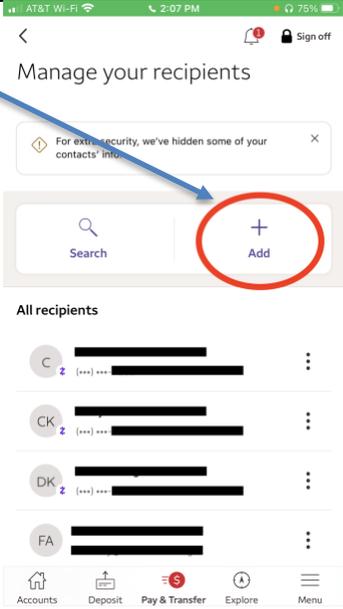
If after reviewing this guide you have questions, please contact your financial institution for assistance using Zelle or you may email secretary@charlesferris.org.

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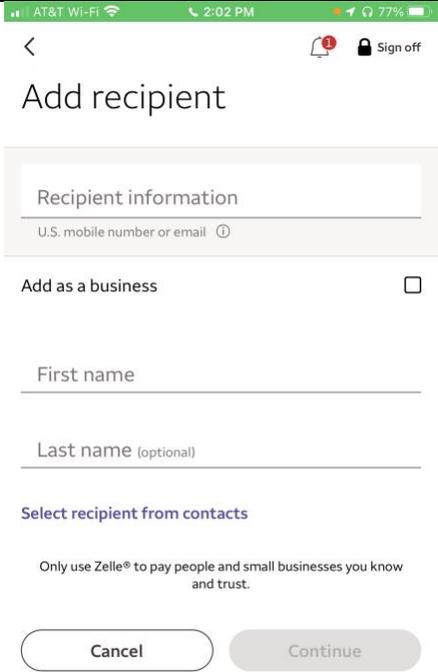
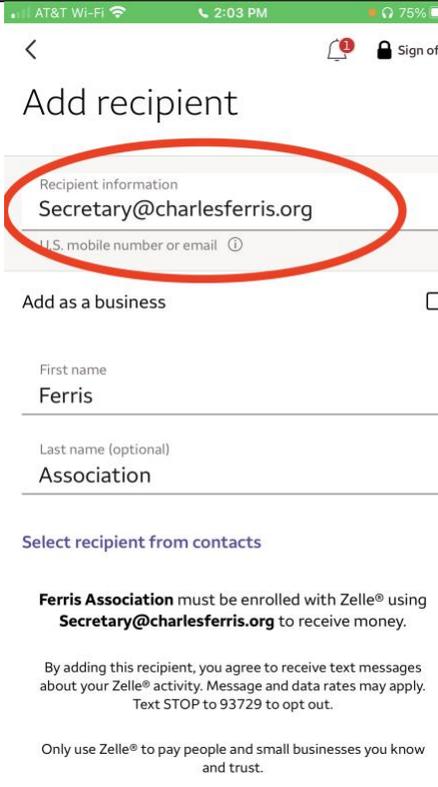
Add a recipient in Zelle: Once you have a Zelle account, you will need to set up the Ferris Association as a Recipient to whom you can send money. Each bank or other financial institution may have slightly different steps to follow, but an example of the steps is provided below as a general guide.

Step	Example
<p>Step 1: Log in to your financial institution account (bank, investment account, etc.) and Click on the Pay option to open the Zelle functionality</p> <p>HINT: this is usually found in a "Transfer/Zelle" or "Pay & Transfer" function</p>	
<p>2. Click the Zelle function</p>	

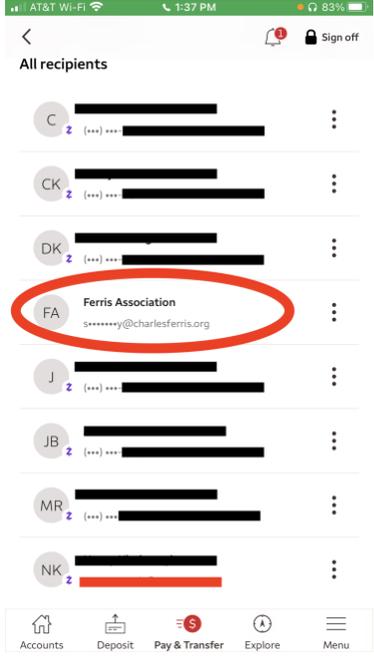
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Step	Example
<p>3. Select the Zelle Recipients option</p>	 <p>The screenshot shows the Zelle app interface. At the top, it says "Send money with Zelle®". Below that is a "Scam Alert!" banner. There are three main action buttons: "Send", "Request", and "QR code". Underneath is the "Activity" section, which contains a list of options: "Recipients", "Zelle® preferences", and "Help". The "Recipients" option is circled in red. A blue arrow originates from the text "3. Select the Zelle Recipients option" and points to the red circle.</p>
<p>4. Click the Add a new Recipient to your Zelle account</p>	 <p>The screenshot shows the "Manage your recipients" screen. At the top, it says "Manage your recipients". Below that is a search bar with a magnifying glass icon and an "Add" button with a plus sign icon. The "Add" button is circled in red. A blue arrow originates from the text "4. Click the Add a new Recipient to your Zelle account" and points to the red circle. Below the search bar is a list of "All recipients" with four entries, each showing a circular icon with a letter (C, CK, DK, FA) and a redacted name.</p>

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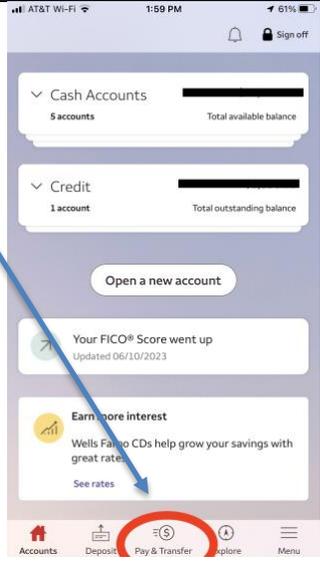
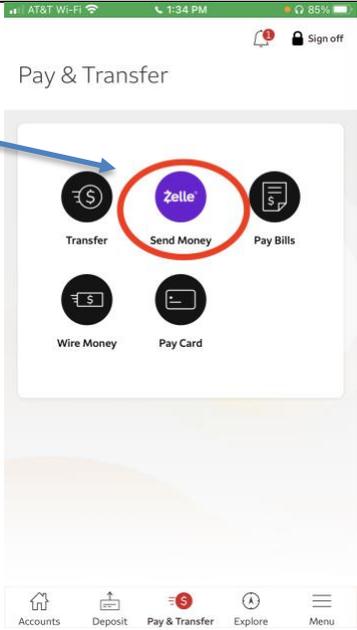
Step	Example
<p>5. Enter the new Recipient's details to your Zelle account</p> <p>NOTES:</p> <ul style="list-style-type: none">• <u>It is critical</u> that in the US mobile number or email field you enter: secretary@charlesferris.org This is how Zelle knows where to direct the funds you want to transfer to the Ferris Association.• Please DO NOT add this recipient as a business.• You may enter any First Name and Last Name that make sense to you.	 <p>Example screenshot of the Zelle 'Add recipient' screen. The 'Recipient information' field is empty. The 'Add as a business' checkbox is unchecked. The 'First name' and 'Last name (optional)' fields are empty. The 'Select recipient from contacts' section is visible.</p>
<p>6. Review the new Recipient's details; once you are certain the information is accurate Click Continue</p> <p>REMEMBER: <u>it is critical</u> that in the US mobile number or email field you enter: secretary@charlesferris.org</p>	 <p>Example screenshot of the Zelle 'Add recipient' screen. The 'Recipient information' field contains 'Secretary@charlesferris.org', which is circled in red. The 'Add as a business' checkbox is unchecked. The 'First name' field contains 'Ferris' and the 'Last name (optional)' field contains 'Association'. The 'Select recipient from contacts' section is visible.</p>

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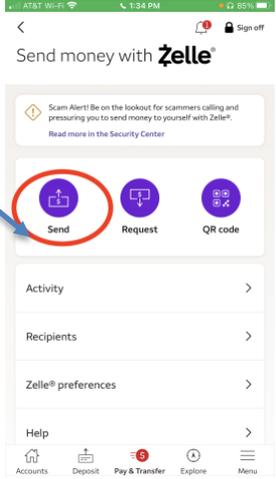
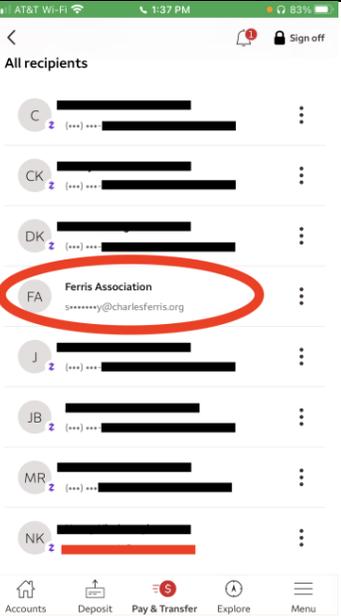
Step	Example
<p>7. You should now see the Ferris Association listed as a recipient in your Zelle list.</p> <p>Congratulations! You're now ready to send a donation to the Ferris Association.</p>	 <p>The screenshot shows the Zelle app interface. At the top, it displays 'All recipients'. Below this, a list of recipients is shown, each with a circular icon containing a letter and a red Zelle logo. The recipient 'FA' (Ferris Association) is highlighted with a red oval. The email address for 'FA' is partially visible as '*****@charlesferris.org'. The bottom navigation bar includes icons for 'Accounts', 'Deposit', 'Pay & Transfer', 'Explore', and 'Menu'.</p>

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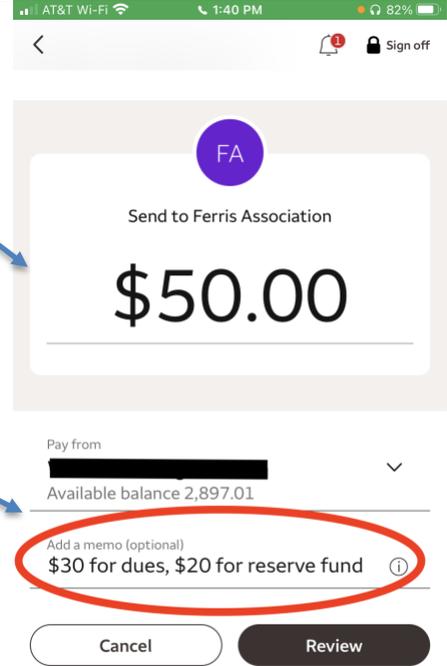
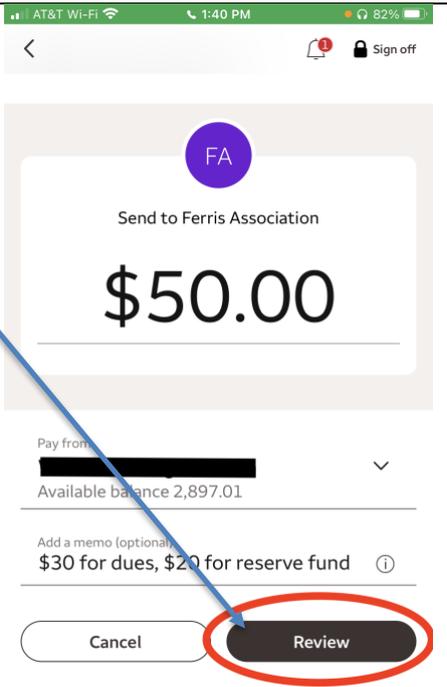
Donate to the Ferris Association with from your Zelle Account: When you're ready to make a donation to the Ferris Association, please refer to the information below. Each bank or other financial institution may have slightly different steps to follow, but an example of the steps is provided below as a general guide.

Step	Example
<p>Step 1: Log in to your financial institution account (bank, investment account, etc.) and Click on the Pay option to open the Zelle functionality</p> <p>HINT: this is usually found in a "Transfer/Zelle" or "Pay & Transfer" function</p>	
<p>2. Click the Zelle function</p>	

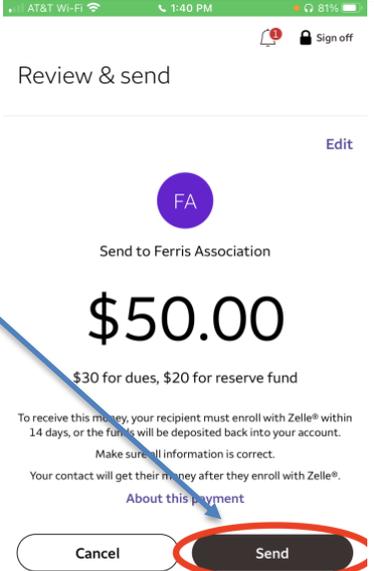
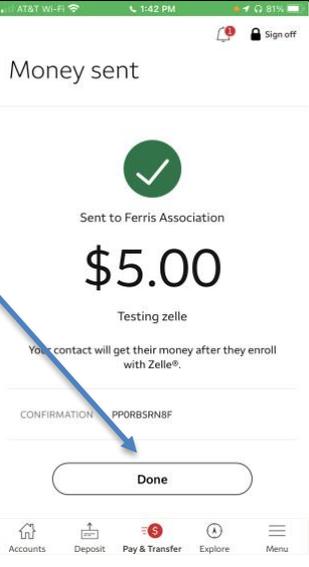
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Step	Example
<p>Step 3: Click on the Send money with Zelle options</p> <p>NOTE: you may be prompted with messages about how to avoid scams with Zelle. You should only send money via Zelle to trusted recipients. Depending on your bank, you may be asked to indicate that you acknowledge that you know to whom you are sending money.</p>	 <p>The screenshot shows the Zelle app interface. At the top, it says "Send money with Zelle". Below that is a security alert. There are three main buttons: "Send", "Request", and "QR code". The "Send" button is circled in red. A blue arrow points from the text in Step 3 to this button. Below the buttons are sections for "Activity", "Recipients", "Zelle® preferences", and "Help". At the bottom is a navigation bar with icons for "Accounts", "Deposit", "Pay & Transfer", "Explore", and "Menu".</p>
<p>Step 4. Select the recipient to whom you want to send money</p>	 <p>The screenshot shows the "All recipients" screen in the Zelle app. It lists several recipients with their initials and names. The recipient "FA Ferris Association" is circled in red. A blue arrow points from the text in Step 4 to this recipient. Below the list is a navigation bar with icons for "Accounts", "Deposit", "Pay & Transfer", "Explore", and "Menu".</p>

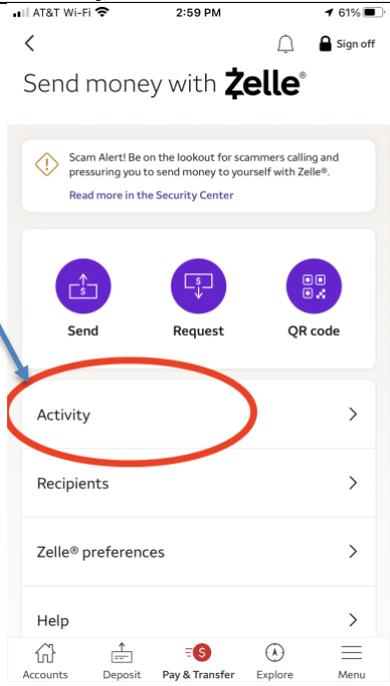
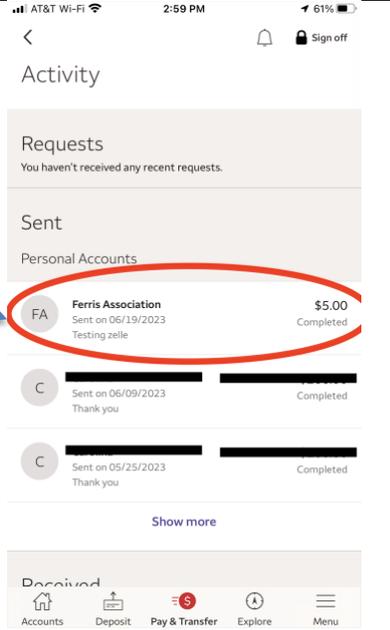
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Step	Example
<p>Step 5: Enter the details about the donation you wish to send including the amount and the account from which you want to send the money.</p> <p>NOTE: Please enter information in the memo field to help us identify you and understand how you wish to allocate your donation:</p> <ul style="list-style-type: none">• Donor's Name• Dues (\$30.00 USD/year)• Association Travel Fund• Association Reserve Fund• The Mother Church General Fund	 <p>The screenshot shows a Zelle payment confirmation screen. At the top, it says 'Send to Ferris Association' with a purple circle containing 'FA'. The amount '\$50.00' is displayed prominently. Below that, it shows 'Pay from' with a redacted account name and 'Available balance 2,897.01'. The 'Add a memo (optional)' field contains '\$30 for dues, \$20 for reserve fund' and is circled in red. At the bottom, there are 'Cancel' and 'Review' buttons.</p>
<p>Step 6: Click Review to see your donation.</p> <p>NOTE: You may be prompted to acknowledge your Zelle transfer. Confirmation processes may vary based on your financial institution and/or your security settings.</p>	 <p>This screenshot is identical to the one above, but the 'Review' button at the bottom right is circled in red, indicating the next step in the process.</p>

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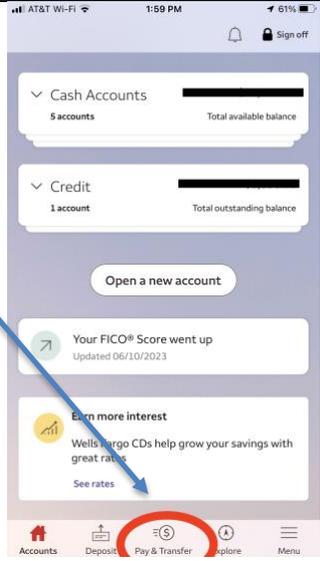
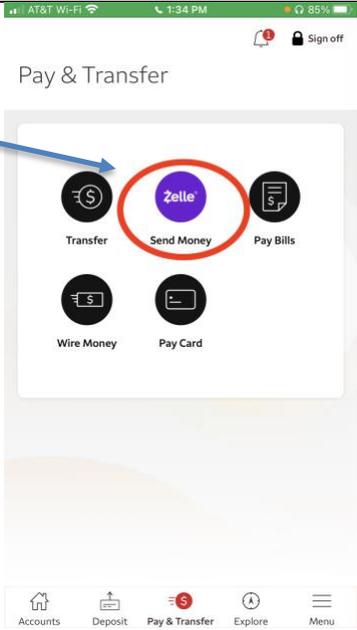
Step	Example
<p>Step 7: Please review your donation. Click Send if everything is accurate.</p> <ul style="list-style-type: none">• If you wish to change any details of your donation, you may select Edit.• If you don't want to donate using Zelle, click Cancel.	 <p>Review & send</p> <p>Edit</p> <p>FA</p> <p>Send to Ferris Association</p> <p>\$50.00</p> <p>\$30 for dues, \$20 for reserve fund</p> <p>To receive this money, your recipient must enroll with Zelle® within 14 days, or the funds will be deposited back into your account. Make sure all information is correct. Your contact will get their money after they enroll with Zelle®.</p> <p>About this payment</p> <p>Cancel Send</p>
<p>Step 8: A confirmation of your donation appears on the screen. Click Done once you've reviewed the transaction.</p>	 <p>Money sent</p> <p>✓</p> <p>Sent to Ferris Association</p> <p>\$5.00</p> <p>Testing zelle</p> <p>Your contact will get their money after they enroll with Zelle®.</p> <p>CONFIRMATION PPORBSRNBF</p> <p>Done</p> <p>Accounts Deposit Pay & Transfer Explore Menu</p>

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Step	Example
<p>Step 9 (optional): You may confirm that your donation was successfully sent by viewing your Zelle activity, Click Activity.</p>	 <p>The screenshot shows the Zelle app interface. At the top, it says "Send money with Zelle®". Below that is a "Scam Alert!" message. There are three main buttons: "Send", "Request", and "QR code". Below these is a list of options: "Activity", "Recipients", "Zelle® preferences", and "Help". The "Activity" option is circled in red. A blue arrow points from the text in Step 9 to this circle. The bottom navigation bar includes "Accounts", "Deposit", "Pay & Transfer", "Explore", and "Menu".</p>
<p>Step 10 (optional): You should see the summary details of your donation to the Ferris Association listed in the Sent section of your Zelle activities.</p>	 <p>The screenshot shows the "Activity" screen in the Zelle app. It is divided into "Requests" and "Sent" sections. Under "Requests", it says "You haven't received any recent requests." Under "Sent", there is a section for "Personal Accounts". A transaction is listed: "FA" (Ferris Association) for "\$5.00", sent on "06/19/2023", with the note "Testing zelle" and a "Completed" status. This transaction is circled in red. A blue arrow points from the text in Step 10 to this circle. Below this are two other transactions with redacted names and dates. A "Show more" link is visible. The bottom navigation bar includes "Accounts", "Deposit", "Pay & Transfer", "Explore", and "Menu".</p>

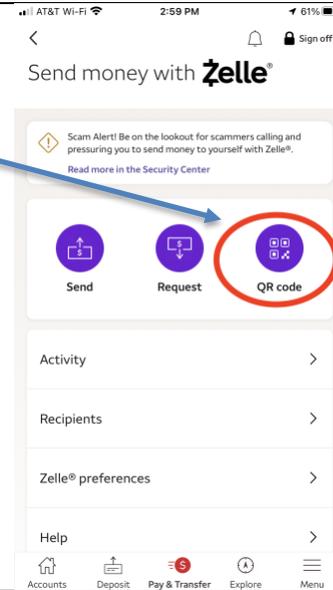
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Send money with Zelle using a QR code: Some financial institutions allow you to scan a QR code to more easily send money to the Ferris Association. You can scan this QR code in step 4 below to send money or see if your institution supports Zelle QR codes.

Step	Example
<p>Step 1: Log in to your financial institution account (bank, investment account, etc.) and Click on the Pay option to open the Zelle functionality</p> <p>HINT: this is usually found in a "Transfer/Zelle" or "Pay & Transfer" function</p>	
<p>2. Click the Zelle function</p>	

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3. Click the **QR Code** option

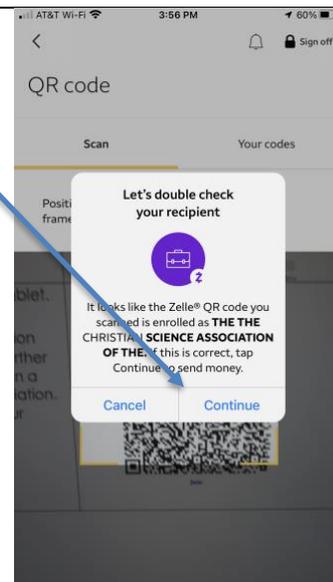


4. **Scan** the **QR Code** using the camera your phone or tablet.

NOTE: the full name of the Ferris Association does not display, it will read as "The Christian Science Association of the". You may change this name later by editing the recipient details.



5. Confirm the details are accurate and **Click Continue.**



You will be prompted to enter the amount of the donation you wish to make. Please refer to steps 5-8 in the **Donate to the Ferris Association with your Zelle Account** section above for further instructions about how to complete your donation details.