Zelle Conversion Weekend for Legacy Clients
Helpful Tips

When Client first uses Q2 and is logged in, Clients will need to re-establish their Zelle services:

1. Client chooses the Zelle widget/tile.
2. Client is prompted to "Get Started" and they click "Get Started"
3. Clients are asked to select a token (which is an email or phone number).
4. Soon after doing that, it will prompt the customer to transfer the token "at another financial institution", although it is technically not at another financial institution. This is due to the Digital Banking conversion from D1Flex to Q2.
5. Once they click "Transfer" it will launch the Zelle experience within Q2.
6. Their contact email and/or phone number should be visible.
7. Payment & Request History should load properly for the client.

**** The only reason this would not work is if the client chooses to re-establish their Zelle and then client chooses a different token (which is an email or phone number) to enroll. This would result in a "New Enrollment" and client's history would not transfer.*

**** FIS will take Zelle down on Thursday 6/25 @ 3:25pm for D1Flex Users. North Texas Zelle Q2 users will still operate normally.*