

Pay & Get Paid

Manage Users and Roles



Manage Users

Before the Level 1 user can manage users and roles in Pay & Get Paid, the user or users that need permissions to access the Pay & Get Paid system must log in to Online or Mobile Banking.

After the sub-users have logged in to Online or Mobile Banking. The Level 1 user can manage users and roles by following the instruction below.

First, log in to Fidelity Bank Online Banking from a computer or mobile device.

Note: the step-by-step instructions in the Pay & Get Paid Quick References Guides are taken from a desktop computer. The process is nearly identical from your mobile device.

Then, select **Pay & Get Paid** from the main navigation menu.

Once Pay & Get Paid loads, click **Settings** and then **Users and Roles** to manage user access and assign roles.

Activate a Sub-User

To activate a sub-user:

1. Select **Edit** next to the user's name to open the User Details screen.
2. Switch the **Account Activation** toggle from Off to **On**.



3. Click **Save** to apply the changes.

Roles and Permissions

Select appropriate level for the sub-user.

The screenshot shows the 'User details' modal with a sidebar on the left containing 'Pay Bills', 'Get Paid', and 'Settings'. The 'Settings' section is expanded, showing 'Company', 'Users and roles', 'Sync and import', 'Bill pay', and 'Funding methods'. The 'Users and roles' section is active, displaying 'Active users 2' and 'All users'. The 'User details' modal is open, showing 'Roles and permissions' with two options: 'Level 2' (unselected) and 'Level 3' (selected and marked 'Active'). The 'Level 3' permissions include: 'Can add and manage bills they create.', 'Can make and manage payments they create.', and 'May require approval from Level 1 or 2 over a set limit.'

Funding Method Access

The Level 1 user or the Pay & Get Paid administrator is responsible for assigning access to funding accounts for Level 2 and Level 3 users.

Full-Access

Full access entitles the user to all funding methods on the profile, including any new funding methods added in the future.

To enable all funding methods, switch the **Full Access** toggle to **On**.

The screenshot shows the 'Funding method access' modal with a sidebar on the left containing 'Company', 'Users and roles', 'Sync and import', 'Bill pay', and 'Funding methods'. The 'Users and roles' section is active, displaying 'Active users 2' and 'All users'. The 'Funding method access' modal is open, showing 'Select the cards and accounts this user can pay with.' and a 'Full access' toggle switch set to 'On'. The 'Full access' description reads: 'Can pay with any funding method, including those added in the future.'



Limit Full-Access

The Level 1 user can limit full access for a user by selecting specific accounts that can be used in Pay & Get Paid.

1. Switch the **Full Access** toggle to **Off**.
2. Select the checkbox next to each funding account the sub-user should have access to.

Pay Bills Get Paid Settings

Settings

Company

- Company details
- Plans and billing
- Billing statements
- Users and roles
- Sync and import

Users and roles

Activate users, set payment limits

Active users 2 ⓘ All users

User

Kristie Linder (You)

User details

Funding method access

Select the cards and accounts this user can pay with.

Full access Off ☐

Can pay with any funding method, including those added in the future.

- ☐ Bank account ***7545 | Basic Busn Chkg
- ☒ Bank account ***7547 | Basic Busn Chkg

When accounts are selected individually, the sub user:

- Will not automatically receive access to new funding accounts added in the future
- Is limited only to the accounts explicitly selected

Payment Approval Limits

Level 3 users have a default payment approval limit of \$0. Any payment over this amount must be approved by a Level 2 or Level 1 user. The Level 1 user can adjust approval limits in the **Payment approval limit** section on the User details screen, as needed.

Users and roles

User

Kristie Linder (You)
kristie.linder@fidelitybanknc.com

Liz Smithman
liz.smithman@fidelitybanknc.com

Matt Key
matt.key@fidelitybanknc.com

Mohit Test
mohit.kadian@fiserv.com

Payment approval limit

Any payment exceeding this amount will require approval from Level 1 or Level 2.

Payment amount *

\$0

Cancel Save