

Pay & Get Paid

Overview



What is Pay & Get Paid?

Pay & Get Paid is our new enhanced all-in-one Business Bill Pay solution that will help you manage bills, payments, and cash flow. Pay & Get Paid helps you:

- Pay business bills and vendors electronically or by check
- Schedule one time, recurring, and automatic payments
- Track payment activity in real time
- Organize vendors and bills in one place
- Sync with accounting software like QuickBooks

Payments are processed using secure, near-real-time technology, so you have better visibility and control over your cash flow.

Getting Started

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.

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



Users and Roles

Pay & Get Paid lets you set up multiple users with different entitlements or permissions. A Pay & Get Paid Administrator (Level 1 User) can establish these entitlements to give users permission to perform specific tasks.

The Users and Roles tab under Settings allows a Level 1 user to view and manage users. This section displays active users, inactive (pending) users, and the funding accounts each user is entitled to access.

The Level 1 user can:

- Add and manage bills
- Make and manage payments
- Manage lower-level user accounts (Level 2 and Level 3), edit payment thresholds for Level 3 users, and manage funding accounts; responsible for assigning funding account entitlements to Level 2 and Level 3 users.

Level 2 users can:

- Can add and manage all bills
- Can make and manage payments
- Can approve payments that need approval

Level 3 users can:

- Can add and manage bills they create
- Can make and manage payments they create
- May require approval from Level 1 or 2 over a set limit