

Pay & Get Paid

Settings



The Settings area allows you to manage administrative tasks and is accessed by selecting the Settings tab.

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 the **Pay & Get Paid** from the main navigation menu.

Once Pay & Get Paid loads, click the **Settings** tab.



Payments Report

The Payments report lets you view your payment totals in one convenient document.

Pay Bills Get Paid **Settings**

Settings

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Bill pay

- Funding methods

Invoicing and getting paid

- Receiving method
- Invoice items
- Invoice settings
- Invoice reminders

Company details

To update company details or legal information, reach out to 855-547-1385

Company information

Business name
TESTERS TACKLE LLC

Business address
100 S MAIN ST, FUQUAY VARINA, NC 27526

Email address
jennifer.foster@fidelitybanknc.com

Phone number
(919) 555-2222

Tax ID number
****4574

Payments report

Export a .CSV file of all payments sent within a specific date range.

Create report

To download a Payments Report, click the **Company Details** menu option under the Settings tab. Then, click the **Create report** button.

Payments report

Select a date range for your report and whether to include future scheduled payments.

☐ Include scheduled payments

Fields marked with an asterisk (*) are required

Debit start date * Debit end date *

Mar 10, 2026 Mar 17, 2026

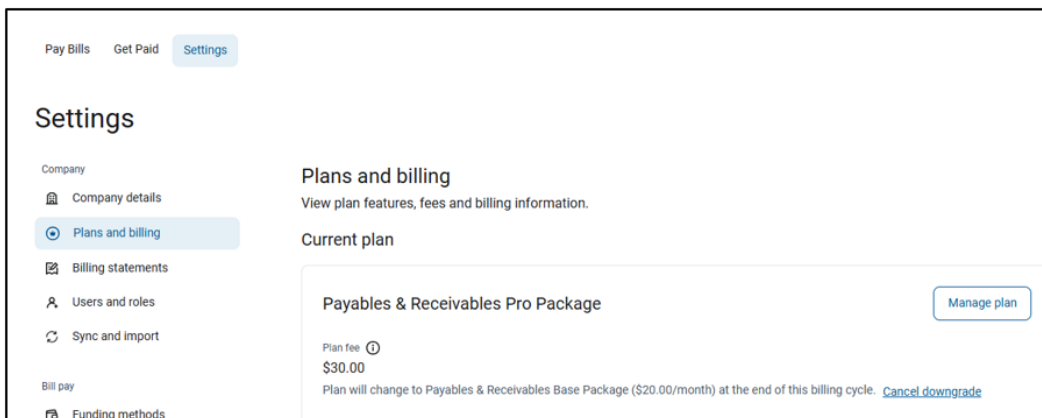
Cancel Download report

In the Payments report dialog box, select a date range, choose whether to include future scheduled payments, then select **Download report** to save the report as a .csv file.



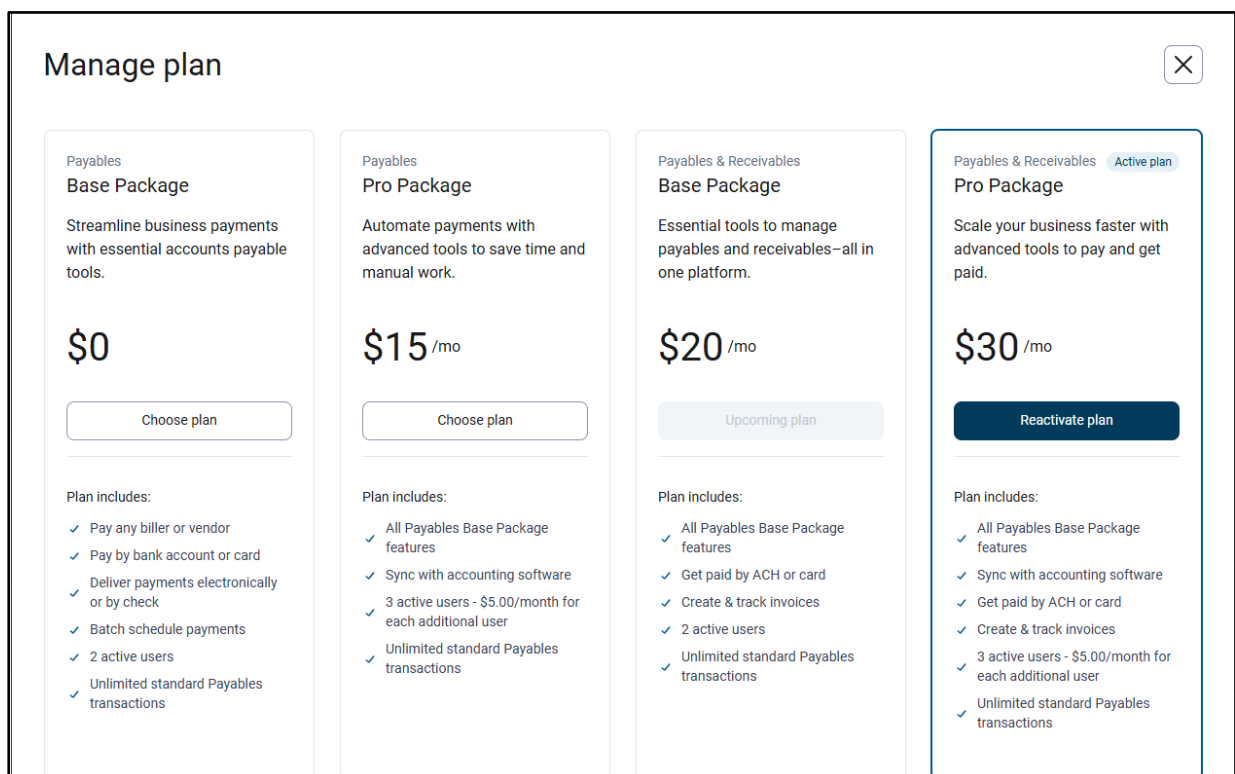
Plans and Billing

Pay & Get Paid offers packages for Accounts Payable and Accounts Receivable. Within these packages, Level 1 users can choose from four plans: Accounts Payable Base, Accounts Payable Pro, Accounts Payable & Receivable Base, and Accounts Payable & Receivable Pro.



To manage Pay & Get Paid plans, the Level 1 user should select **Plans and billing** under the Settings tab. Then, click the **Manage plan** button.

The Manage plan screen will display, select the desired plan by clicking the **Choose plan** button under the plan you would like to enroll in. **Note:** Only Level 1 users can select, change, or edit plans.





Billing Statements

Billing statements can be viewed by navigating to **Billing statements** under the Settings tab. Statements appear once issued and are generated on the third business day of each month. Billing statements are available to Level 1 users for up to 18 months and can be downloaded as a PDF. Statements are created even if the billing amount is \$0.

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