CUSTOMER PORTAL

Guide to Making Payments

Registered Customers

If you already have a Customer Portal account and have been making payments online, you will need to reset your payment methods when the new Customer Portal launches on June 12, 2023. Instructions for setting up payment methods start on page 2 of this guide.

If you have an account, but have not activated online payments, contact Roxana Hardies (roxana@pioneerws.com) to get started.

Need a Customer Portal Account?

We're here to help. If you have not registered for access to your Customer Portal yet, contact Roxana Hardies (roxana@pioneerws.com) to start the process.

New Payment Features

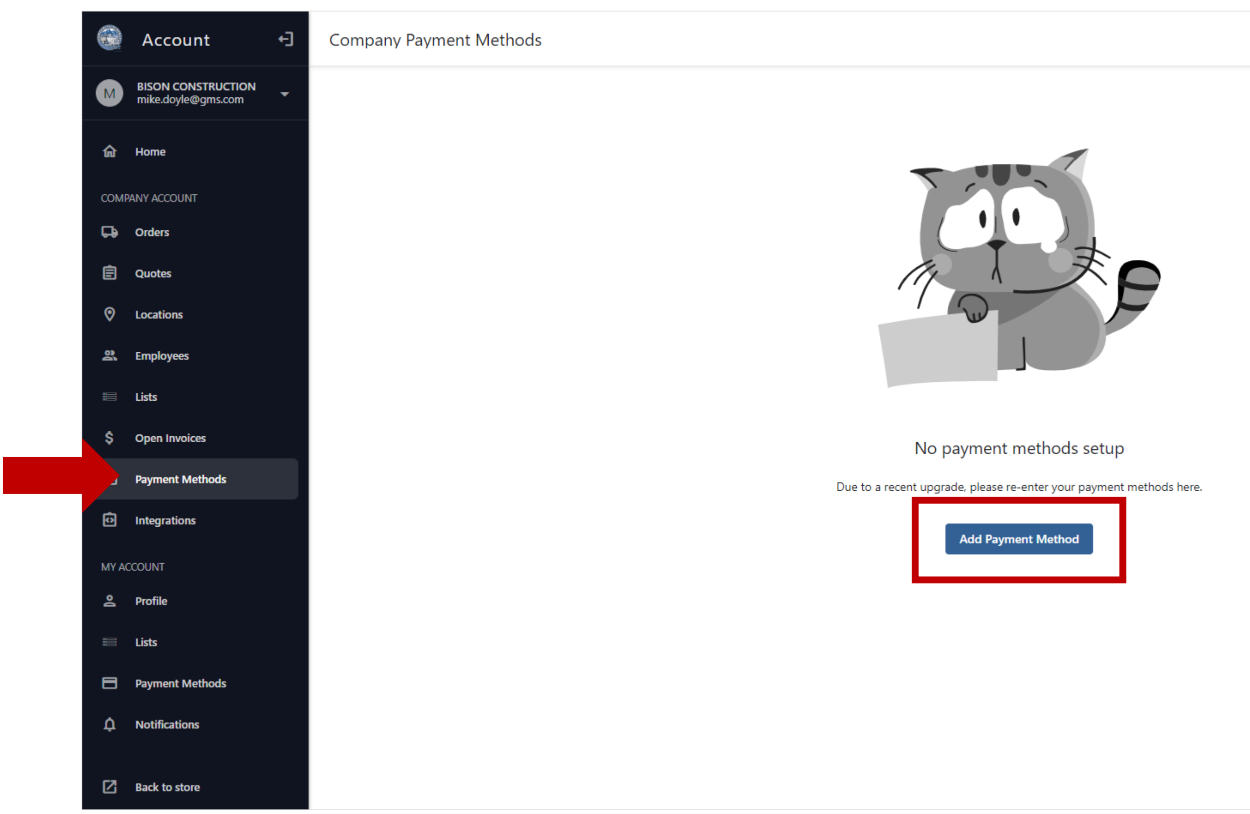
- Storing multiple payment types
- Downloading and printing PDF versions of your invoice
- Requesting Lien Release documents for specific invoices and jobs

Setup Payment Methods

Once your account has been approved for online payments, two new tabs will appear on the left side navigation bar - **Payment Methods** and **Open Invoices.**

Customers who were previously making online payments will already have the **Payment Methods** tab available. For security purposes, no banking information was transferred when the website was upgraded, so you will need to re-add your payment methods.

In the **Payment Methods** section click the **Add Payment Method** button.

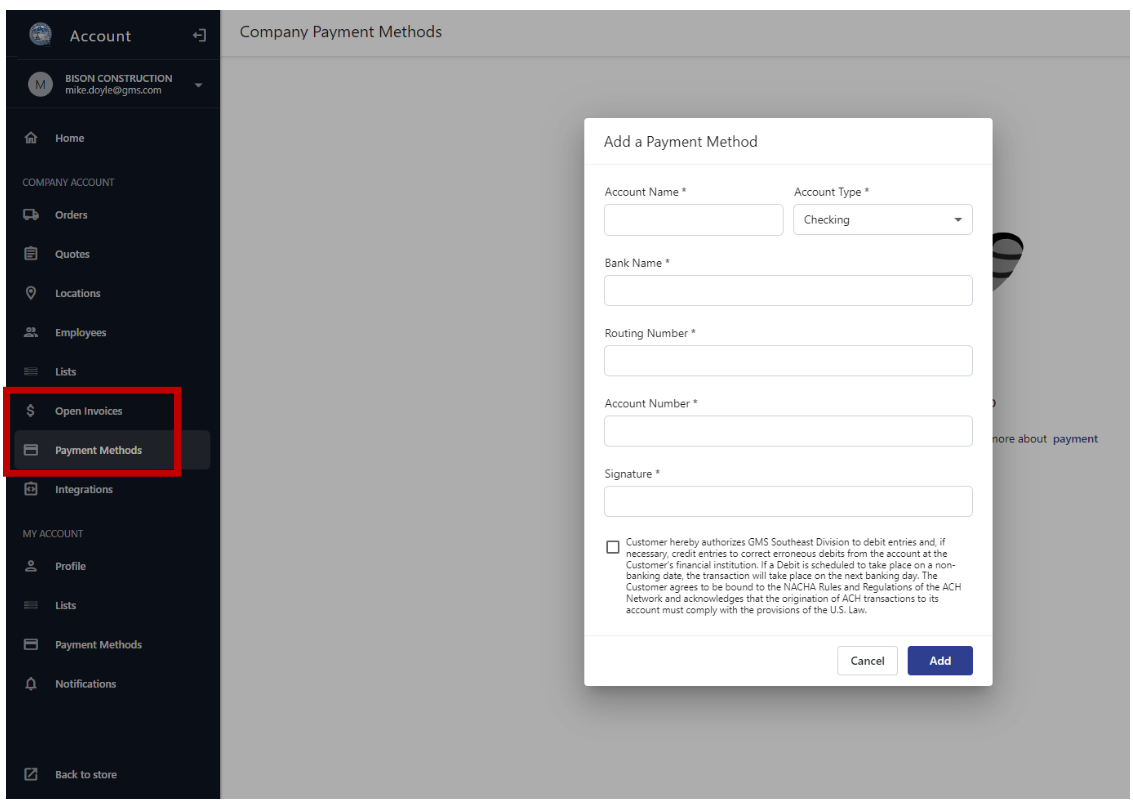


Setup Payment Methods

On the **Add Payment Method** form, fill out the required fields to add a bank account.

This payment method will be safely stored on your account and available for future use when paying open invoices

You can now save multiple payment methods. Simply repeat the previous steps to add additional payment methods.



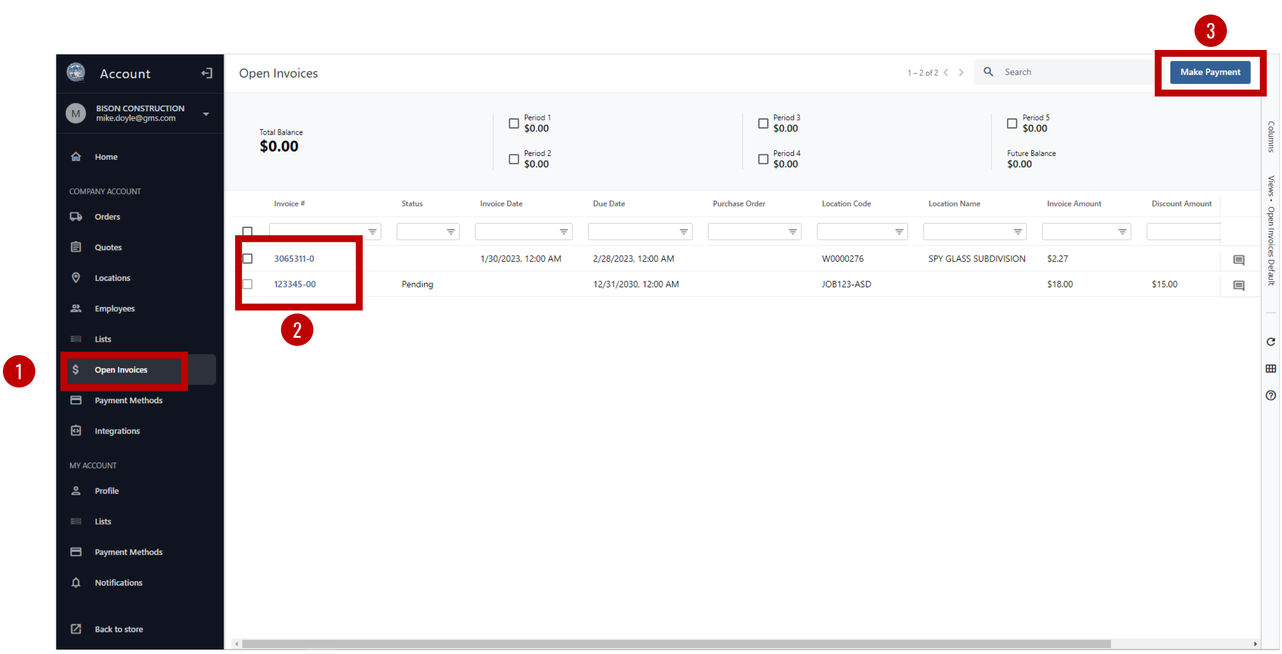
Make Payments

1. To view and pay orders, click on the **Open Invoices** tab on the toolbar

2. To view or print individual invoices click the **Invoice Number**.

3. Select your invoices and click **Make Payment**. Choose your payment method and that's it!

Note: status of "Pending" will appear in the column once an order has been paid but not yet processed. The check box next to the order number will turn gray and not allow you to pay the same order again once submitted.

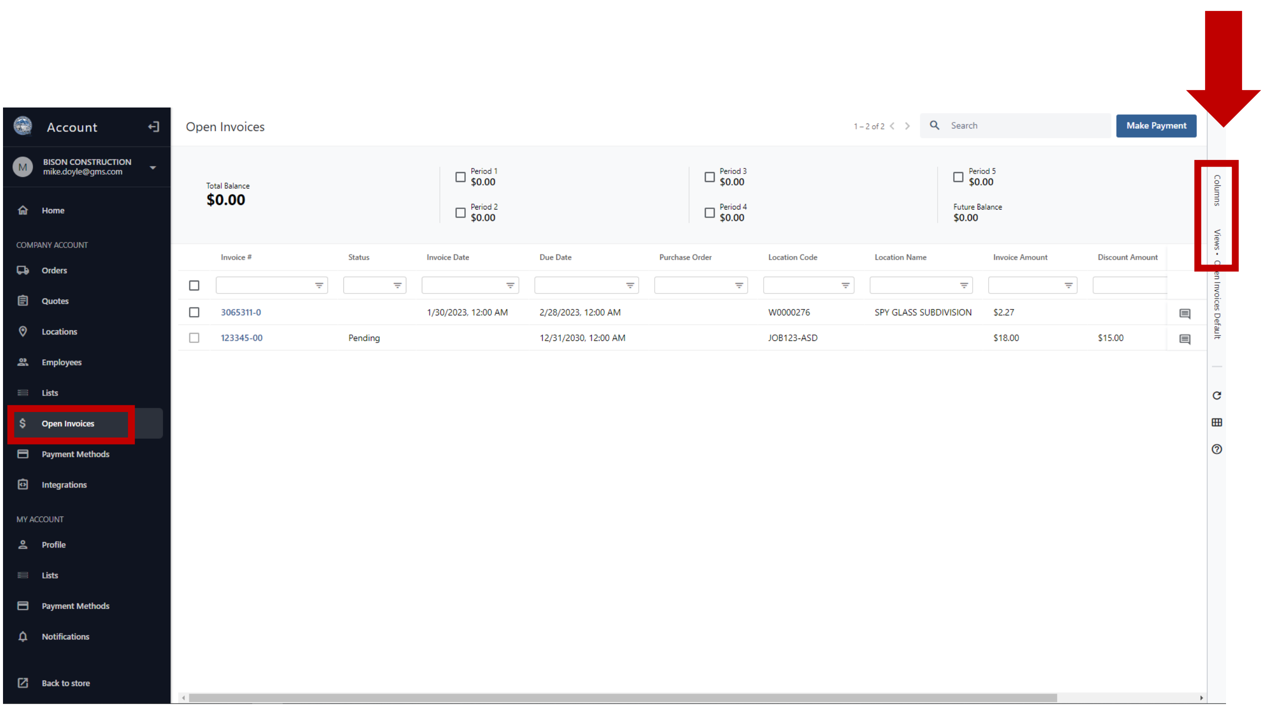


Customize Your View

You can customize your view of the **Open Invoices** screen. Simply add or remove columns by using the **Columns** tab on the far right of the page.

Rearrange your columns by clicking and holding the column heading, then drag it to the desired spot.

Save your preferred view and layout in the **Views** tab on the far right. You can even set a default view to open each time you sign on.

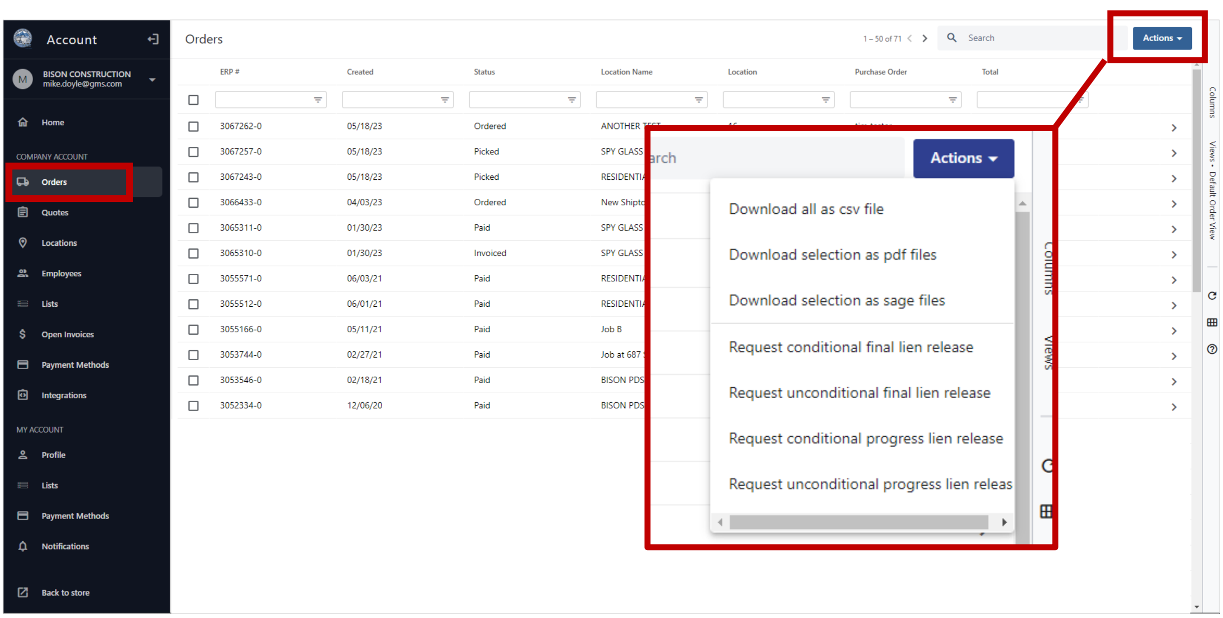


Download Orders and Request Lien Releases

Navigate to the **Orders** tab for new functions that help you save time and run your business more efficiently.

After selecting your orders, the **Actions** button lets you download and print PDF versions of the orders.

You can also request a lien release for orders from the **Actions** menu.



Have Questions or Need Assistance?

Contact Roxana Hardies:
roxana@pioneerws.com