



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.

The screenshot displays the customer portal interface. On the left, a dark navigation bar contains various menu items. A red arrow points to the 'Payment Methods' tab. The main content area is titled 'Company Payment Methods' and features a cartoon cat holding a document. Below the cat, the text reads 'No payment methods setup' and 'Due to a recent upgrade, please re-enter your payment methods here.' A red-bordered button labeled 'Add Payment Method' is prominently displayed.



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.

The screenshot displays the 'Company Payment Methods' section of the customer portal. On the left sidebar, the 'Payment Methods' option is highlighted with a red box. The main content area shows the 'Add a Payment Method' form. The form includes the following fields:

- Account Name *
- Account Type * (Dropdown menu showing 'Checking')
- Bank Name *
- Routing Number *
- Account Number *
- Signature *

Below the signature field, there is a checkbox for authorization: ☐ Customer hereby authorizes GMS Southeast Division to debit entries and, if necessary, credit entries to correct erroneous debits from the account at the Customer's financial institution. If a Debit is scheduled to take place on a non-banking date, the transaction will take place on the next banking day. The Customer agrees to be bound to the NACHA Rules and Regulations of the ACH Network and acknowledges that the origination of ACH transactions to its account must comply with the provisions of the U.S. Law.

At the bottom of the form are two buttons: 'Cancel' and 'Add'.



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.

Account

BISON CONSTRUCTION
make.doyle@gms.com

Home

COMPANY ACCOUNT

- Orders
- Quotes
- Locations
- Employees
- Lists
- Open Invoices**
- Payment Methods
- Integrations

MY ACCOUNT

- Profile
- Lists
- Payment Methods
- Notifications
- Back to store

Open Invoices

1 - 2 of 2 < > Search

Make Payment

Total Balance
\$0.00

☐ Period 1
\$0.00

☐ Period 2
\$0.00

☐ Period 3
\$0.00

☐ Period 4
\$0.00

☐ Period 5
\$0.00

Future Balance
\$0.00

Invoice #	Status	Invoice Date	Due Date	Purchase Order	Location Code	Location Name	Invoice Amount	Discount Amount
<input type="checkbox"/> 3065311-0		1/30/2023, 12:00 AM	2/28/2023, 12:00 AM		W0000276	SPY GLASS SUBDIVISION	\$2.27	
<input type="checkbox"/> 123345-00	Pending		12/31/2030, 12:00 AM		JO8123-ASD		\$18.00	\$15.00

Columns: Views - Open Invoices Default



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.

Account

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makeboyle@gms.com

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MY ACCOUNT

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Open Invoices

1 - 2 of 2 < >

Search

Make Payment

Total Balance
\$0.00

Period 1
\$0.00

Period 2
\$0.00

Period 3
\$0.00

Period 4
\$0.00

Period 5
\$0.00

Future Balance
\$0.00

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Columns Views - Open Invoices Default



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.

The screenshot displays the Pioneer Materials West customer portal interface. On the left is a dark sidebar with navigation links: Home, COMPANY ACCOUNT, Orders (highlighted with a red box), Quotes, Locations, Employees, Lists, Open Invoices, Payment Methods, Integrations, MY ACCOUNT, Profile, Lists, Payment Methods, Notifications, and Back to store. The main content area is titled 'Orders' and shows a table with columns: ERP #, Created, Status, Location Name, Location, Purchase Order, and Total. The table contains 15 rows of order data. A red box highlights the 'Actions' button in the top right corner of the table. A dropdown menu is open from this button, listing the following options: Download all as csv file, Download selection as pdf files, Download selection as sage files, Request conditional final lien release, Request unconditional final lien release, Request conditional progress lien release, and Request unconditional progress lien release. The table data includes various order statuses such as 'Ordered', 'Picked', 'Paid', and 'Invoiced'.

ERP #	Created	Status	Location Name	Location	Purchase Order	Total
3067262-0	05/18/23	Ordered	ANOTHER TEST			
3067257-0	05/18/23	Picked	SPY GLASS			
3067243-0	05/18/23	Picked	RESIDENTIAL			
3066433-0	04/03/23	Ordered	New Shipton			
3065311-0	01/30/23	Paid	SPY GLASS			
3065310-0	01/30/23	Invoiced	SPY GLASS			
3055571-0	06/03/21	Paid	RESIDENTIAL			
3055512-0	06/01/21	Paid	RESIDENTIAL			
3055166-0	05/11/21	Paid	Job B			
3053744-0	02/27/21	Paid	Job at 687			
3053546-0	02/18/21	Paid	BISON PDG			
3052334-0	12/06/20	Paid	BISON PDG			



**PIONEER MATERIALS
WEST** *A GMS COMPANY*

Have Questions or Need Assistance?

Contact Roxana Hardies:
roxana@pioneerws.com