



## 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](mailto: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](mailto: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.

Account

BISON CONSTRUCTION  
mike.doyle@gms.com

Home

COMPANY ACCOUNT

Orders

Quotes

Locations

Employees

Lists

Open Invoices

**Payment Methods** (selected)

Integrations

MY ACCOUNT

Profile

Lists

Payment Methods

Notifications

Back to store

Company Payment Methods

No payment methods setup

Due to a recent upgrade, please re-enter your payment methods here.

Add Payment Method



## 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 shows the customer portal interface. On the left, a sidebar menu is open, showing options like Home, Orders, Quotes, Locations, Employees, Lists, Open Invoices (which is highlighted with a red box), Payment Methods (which is also highlighted with a red box), Integrations, My Account, Profile, Lists, Payment Methods, Notifications, and Back to store. The main content area is titled 'Company Payment Methods'. A modal window titled 'Add a Payment Method' is displayed in the center. The modal contains fields for Account Name (with a required asterisk), Account Type (set to 'Checking'), Bank Name, Routing Number, Account Number, and Signature. At the bottom of the modal is a checkbox with the following text: '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 day, the transaction will be placed on the next banking day. The Customer agrees to be bound by 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.' Below the checkbox are 'Cancel' and 'Add' buttons.



## 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.

Invoice #	Status	Invoice Date	Due Date	Purchase Order	Location Code	Location Name	Invoice Amount	Discount Amount
3065311-0	Pending	1/30/2023, 12:00 AM	2/28/2023, 12:00 AM		W0000276	SPY GLASS SUBDIVISION	\$2.27	
123345-00	Pending	12/31/2030, 12:00 AM			JOB123-ASD		\$18.00	\$15.00



## 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.

The screenshot shows the 'Open Invoices' screen within a web-based application. On the left, a dark sidebar menu is visible with various options like 'Home', 'Orders', 'Quotes', 'Locations', 'Employees', 'Lists', 'Open Invoices' (which is highlighted with a red box), 'Payment Methods', and 'Integrations'. The main content area is titled 'Open Invoices' and displays a table of invoices. The table columns are: Invoice #, Status, Invoice Date, Due Date, Purchase Order, Location Code, Location Name, Invoice Amount, and Discount Amount. There are five invoices listed:

Invoice #	Status	Invoice Date	Due Date	Purchase Order	Location Code	Location Name	Invoice Amount	Discount Amount
3065311-0	Pending	1/30/2023, 12:00 AM	2/28/2023, 12:00 AM	W0000276	SPY GLASS SUBDIVISION	\$2.27		
123345-00	Pending	12/31/2030, 12:00 AM		JOB123-JSD		\$18.00	\$15.00	

At the top right of the main content area, there are buttons for 'Make Payment' and 'Search'. Below these buttons are two tabs: 'Columns' (which is highlighted with a red box) and 'Views' (with a red arrow pointing to it). The right side of the screen shows a vertical sidebar with icons for 'Open Invoices', 'Payment Methods', 'Integrations', 'Profile', 'Lists', 'Payment Methods', 'Notifications', and 'Back to store'.



## 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 shows the Customer Portal interface. On the left is a dark sidebar with navigation links: Account, Home, COMPANY ACCOUNT (with 'Orders' highlighted in red), Quotes, Locations, Employees, Lists, Open Invoices, Payment Methods, and Integrations. Below this is MY ACCOUNT with Profile, Lists, Payment Methods, and Notifications, and a 'Back to store' link. The main content area is titled 'Orders' and displays a grid of order details. The grid columns include: ERP #, Created, Status, Location Name, Location, Purchase Order, and Total. A search bar and a 'Actions' button are at the top of the grid. A red box highlights the 'Actions' dropdown menu, which lists: 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. To the right of the grid is a vertical sidebar with 'Columns', 'Views', and 'Views' buttons, and a 'Columns' and 'Views' dropdown menu.



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## **Have Questions or Need Assistance?**

Contact Roxana Hardies:  
[roxana@pioneerws.com](mailto:roxana@pioneerws.com)