



## **Guidelines for Email Address to Use When Creating a Portal Account – for Businesses**

A Portal account allows for submitting applications, paying fees online, responding to correction comments, requesting inspections, and tracking status.

Depending on the size of your business and the way you do your business, there are some differences in how to set up your Portal account and email to be most successful. Here are some guidelines you may consider:

### **Small firms – sole proprietor or 2-5 staff who all need access to Portal**

Our recommendation is to use or create one email address and one Portal account for your business (ie [admin@plumbing.com](mailto:admin@plumbing.com)). You may share the Portal login email and password with any of your staff that need to access it to perform their duties. When logged in, they will be acting on behalf of your business.

### **Large firms with many active projects and/or multiple project managers**

Having a single Portal account for a large firm with many employees may become cumbersome if many need access to the Portal account. Every single project will be visible to anyone who has the login which may be inappropriate or just overwhelming to organize.

Our recommendation is to use or create one email address and one Portal account for your business (ie [admin@plumbing.com](mailto:admin@plumbing.com)) as the ‘officially linked’ account, and have each project manager create their own *personal* Portal account (ie [bob@plumbing.com](mailto:bob@plumbing.com)). This way both the firm, as well as the project manager working for the firm, will have access to their active projects. The firm account can see all projects, but the project manager only sees the projects that they are handling.

Applicants have the ability to add a business as a contact for their project, both during initial application submission and at any point in the life of the project. Applicants have the ability to request individuals or project managers be added as a contact to their project during initial application submission, and staff can complete those requests. Later in the life of a project, applicants may reach out to City staff to request individuals or project managers be added as contacts as well.



**\*If you have projects currently in-process that we are migrating from our legacy systems into the new Online Permit Center, be sure to use the same email address on file in our legacy system to register your new Portal account.**

This ensures that your new Portal account syncs up to give you access to those legacy projects. If you or your business have used multiple email addresses in our past legacy system, the sync may not capture all the projects you expect to see. Reach out to City staff at [permitcenter@bendoregon.gov](mailto:permitcenter@bendoregon.gov) for assistance in getting those email addresses and projects switched over to your current Portal account view.