Prosper Portland User Guide

Updated: March 2025

Contents

Summary

You will begin with a two-step process to set-up your Vendor Portal. Please see subsequent pages of this document for a more detailed walk through of each step of the process.

Step 1. Start by registering yourself by entering your legal first name and last name, Federal Tax ID, and email address into the Vendor Portal. You will receive an invitation email to accept your Vendor Portal creation that will include an 8-digit single-use code to complete your registration. When you login with that code, you will update your business name and contact information as well as upload your W-8 or W-9 (see pages 1-16).

Step 2. Vendor Services staff will then approve your registration creation within 2-5 business days. Once you have been approved, you will be able to enter back into your Vendor Portal to finalize your setup by entering your banking information to receive payments via ACH and to upload your City of Portland and Oregon Secretary of State registration documents (see pages 16-24).

Congratulations! You have completed your Vendor Portal registration and set-up your profile. A welcome email from Prosper Portland Vendor Services will be forthcoming shortly after. Once work begins, you can access the Portal to look up and review purchase orders and any of your related invoices (see pages 26-30).

Note: Prosper Portland will confirm your Federal Tax ID with the Internal Revenue Service (IRS). If your Federal Tax ID does not match the business name, your vendor setup process could be delayed.

You may locate your Federal Tax ID, also known as your Employer Identification Number (EIN) in a few ways: check your EIN confirmation letter, review your business documents (e.g., Tax returns, licenses and permits or payroll paperwork like 1099s) or contact the IRS Business and Specialty Tax Line at 1-800-829-4933.

## Language Translation Assistance

Note: Translation support software is available and based on your language preference you will be able to make your selection on your Vendor Portal homepage and within your Prosper Portland Vendor Services profile.

Step 1. Login to the Prosper Portland Vendor Portal or enter the following address in your browser: https://prosperportlandvendorservices.powerappsportals.us/
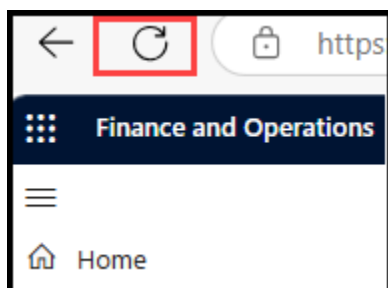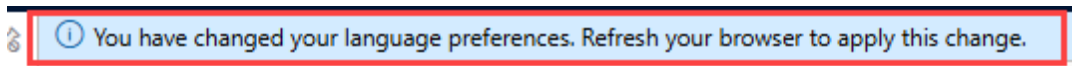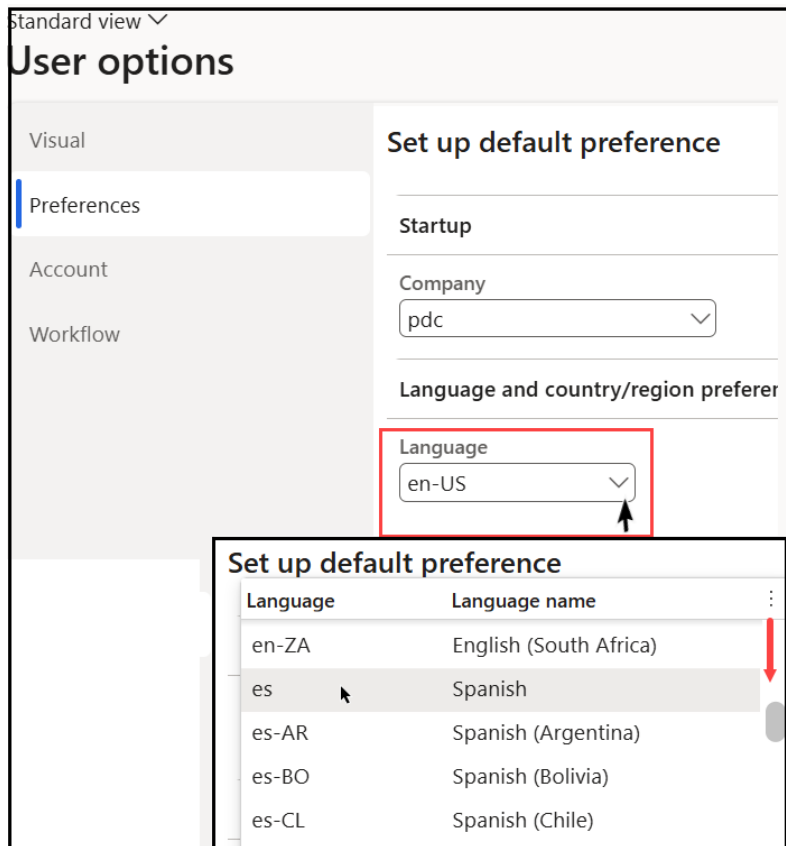
Step 2. Click the gear setting button on the top black ribbon
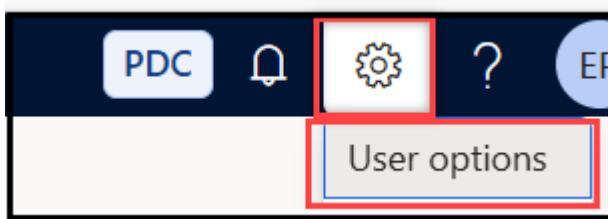
Step 3. Select User options > Preferences
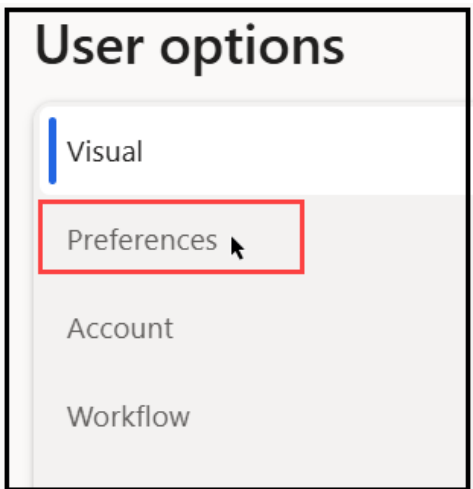
Step 4. Select Language dropdown from the Language and country/region preferences section

Accounts Used to Login to Vendor Services

Prosper Portland Vendor Services recommends vendors register with their business/work email address.

Recommended Browsers with Vendor Portal

The Vendor Portal works with most major web browsers such as Chrome, Edge, and Safari. We do not advise using Internet Explorer.

Registering A New Vendor or Existing Vendor

Prosper Portland vendors may register as a new vendor with the documented steps below in the Prosper Portland D365 Vendor Portal. Existing Prosper Portland vendors may register as a user and be associated with their existing vendor account, may follow the same steps except where indicated.

Registering

Step 1. Navigate to the Prosper Portland Vendor Portal or enter the following address in your browser: https://prosperportlandvendorservices.powerappsportals.us/

Step 2. Click the Register button on the top black ribbon

Step 3. Complete the requested registration information fields including your work/business email address and Federal Tax ID, then select Register. Step 3 for Existing Vendor for additional instruction:

Message while processing

Message when complete

Registration details submitted.

Continue to step 4.

Step 3. Existing Vendors

Complete the requested registration information fields with the following field exceptions
   a. Business Email (Use an Individual Work Email Address – (i.e. person@company.com)
   b. Federal Tax ID
      a. Use the Federal Tax ID # that is associated with your business and previous vendor account

Then click Register.

If the Vendor Account is located, a message will appear stating that the Federal Tax ID already exists. Select Add as contact.

Federal Tax ID already exists

Message: The Federal Tax ID you entered is already registered with Prosper Portland. You will be added as a contact for this Vendor. Do you want to continue?

Cancel   Add as contact

Validate your primary e-mail address and phone number. Select Add as contact

Continue to Step 4.

Step 4. A registration link will be sent to the e-mail address entered during registration.

> Note: Please allow up to 15 minutes for the email to arrive. Be sure to check SPAM/Junk Folder(s) for the email that which will arrive from invites@microsoft.com. If you do not receive this email, stop and contact Prosper Portland Vendor Services at VendorServices@ProsperPortland.us for further assistance.

Step 5. Select the Accept Invitation button/link in the registration email

Step 6. Sign In to your existing Microsoft Account using the email address used during
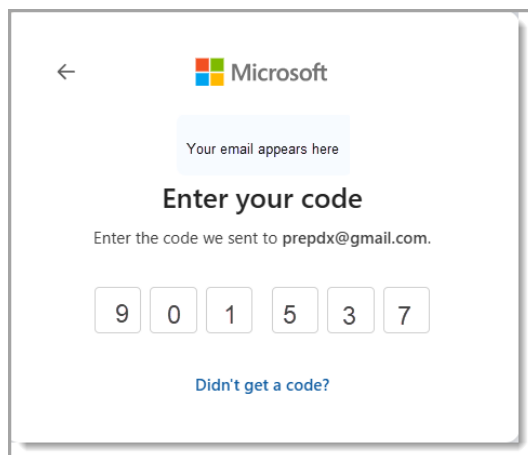
registration or create a new Microsoft account for that email address if prompted.

Note: If your work/business email is set up with Microsoft, your account password may be your email/work/network password for your business. For security purposes, we do NOT have access to any passwords. Passwords are managed between you and Microsoft and/or your business. We are unable to reset any passwords. If you create a new Microsoft account, be sure to setup account recovery options when registering so you can reset the password if needed.

Step 7. After entering your existing password or creating a password if prompted, validate your account using the confirmation code sent to your provided email address.
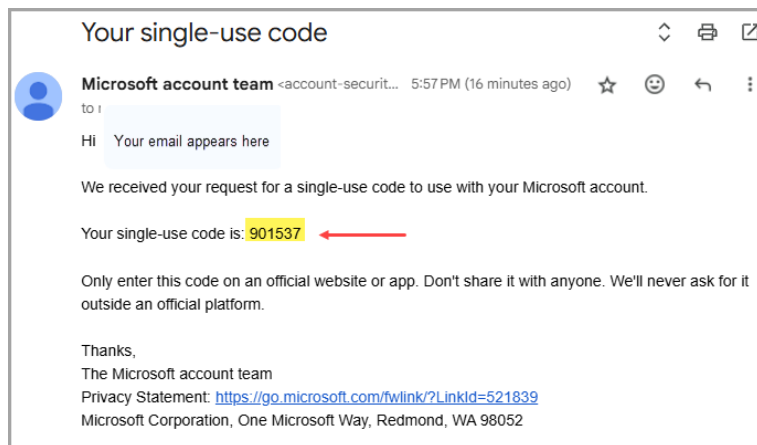
Step 8. If prompted, select the Country/region where you conduct business.

Step 9. Read and accept any Terms and conditions and complete any security prompts.

Step 10. Select Accept to link your Microsoft Account with Vendor Services.

Permissions requested by:

Prosper Portland
pdxdevelopment.onmicrosoft.com

By accepting, you allow this organization to:

∨   Receive your profile data

∨   Collect and log your activity

∨   Use your profile data and activity data

You should only accept if you trust Prosper Portland. **Prosper Portland has not provided links to their terms for you to review.** You can update these permissions at https://myaccount.microsoft.com/organizations.
Learn more

This resource is not shared by Microsoft.

Cancel   Accept

Vendor Registration

Step 11. Select Next to begin populating registration.

Country/region

Step 12. Select the applicable Country/region or enter an abbreviation in the filter field. For example, USA followed by enter on the keyboard will bring up United States.
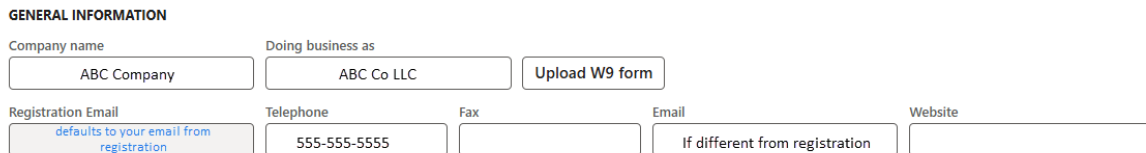
Terms and Conditions of Use

Step 13. Read the Terms and Conditions of Use. Upon your agreement, click/switch the button under Accept Terms and Conditions to continue.
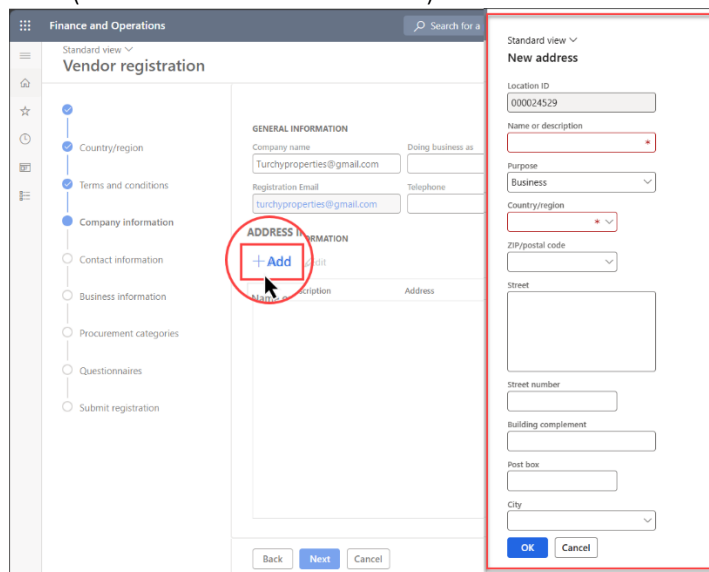

Company information

Step 14. Under the General Information section, complete the following fields:

a. Doing business as
b. Telephone
c. Email (Company/Business Email) - This email is for business notifications and can be different from the registration email address.

d. Address (Select "Add" to create new)

e. Enter a "Name or description" field (examples: Main, Location, Payment, Business, Owner…)

f. Vendors must add a primary and remit address indicated using the Purpose and Primary fields.

g. Click "OK"

Step 15. Click the Upload W9 form button to upload a W9 or W8 form for the company.

GENERAL INFORMATION

Company name	Doing business as	
ABC Company	ABC Co LLC	Upload W9 form

Registration Email	Telephone	Fax	Email	Website
defaults to your email from registration	555-555-5555		If different from registration	

ADDRESS INFORMATION

+ Add   ✎ Edit

Name or description	Address	Purpose	Primary	↓
Business	220 NW 2nd Ave PORTLAND, OR 97209	Remit-to	Yes	

> a. A W9 is required before a Purchase Order can be issued by the City or work can be performed by a vendor.

Standard view ˅
Upload document

File to upload
fw9.pdf

Browse

Notes
W9 for my business

Name
fw9

Document Type
W9/W8

Upload

ⓘ   File uploaded as 'fw9.pdf'

Contact Information

Step 16. Enter contact information fields for the primary contact on the vendor account

> a. First name, Middle name (optional), Last name
> b. Telephone
> c. Address (If the address is the same as the business address, click/switch Address same as Business. Otherwise, select Add to add the separate address for the Contact.

Address same as Business

⬤ No

Business Information

Step 17. Enter all relevant information regarding Ownership Profile, City Registration number

under City ID, Select Name to use on 1099 and State tax ID and State.

Procurement categories
Step 18. No longer used, you will automatically move to next step.

Questionnaires

Step 19. Review Information and helpful links about the Questionnaire. When you are ready to, select "Complete questionnaire" to answer questions.

a. An "End" button will appear on the last question, when complete, click End and the questionnaire Status will show "Finished" click next to go to final registration step.

Submit registration

Step 20. When you have completed all registration information, click Finish

a. It is important to submit registration as accurate and complete as possible

Submit registration

When you have submitted your registration, you cannot modify the information. Click Finish to submit.

Back Finish Cancel

Step 21. The registered vendor will receive an email confirming registration once Prosper Portland's review is complete. This can take 2 – 5 business days.

Vendor registration

Congratulations! You have completed your registration. Your application is currently being reviewed. Upon approval you will receive a welcome letter by email within 2-5 business days. For any questions, please contact us at VendorServices@ProsperPortland.us.

Logging into Prosper Portland Vendor Services

Prosper Portland vendors may log into Vendor Services with the documented steps below in the Prosper Portland D365 Vendor Portal.

Step 1. Navigate to the Prosper Portland Vendor Portal or enter the following address in your browser: https://prospertestvendorportal.powerappsportals.us/

Step 2. Click the Login button
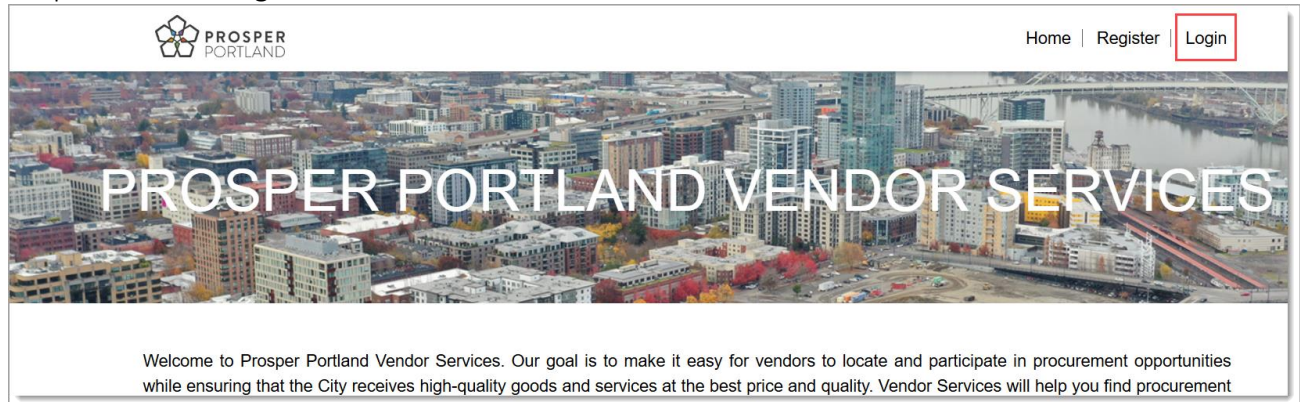
Step 3. Enter login credentials used during registration.

Step 4. Validate by entering code sent to your email. Click the Sign in button.

Uploading Attachments and Banking Information to Vendor Record

Prosper Portland vendors may add attachments to their Vendor Profile with the documented steps below in the Prosper Portland D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Login to the Prosper Portland Vendor Services Site (See Logging into Prosper Portland Vendor Services for additional Assistance.)

Step 2. Click the "Vendor information" tile
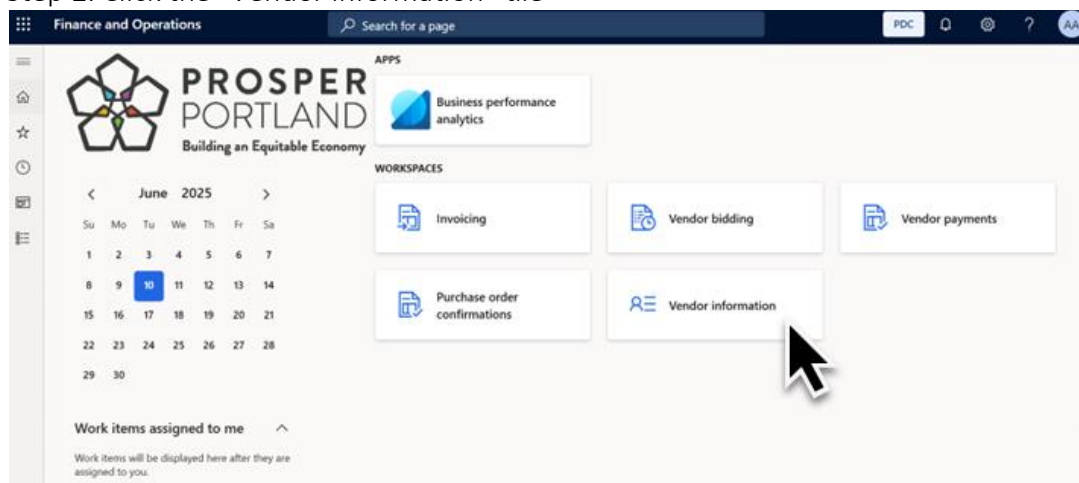
Step 3. Select the "Upload attachments" tile
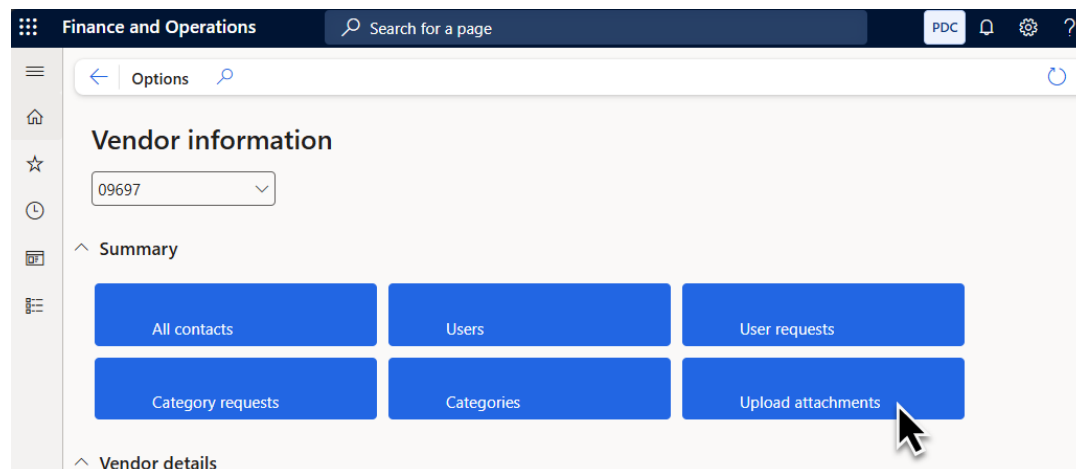
Step 4. Select the "New" button
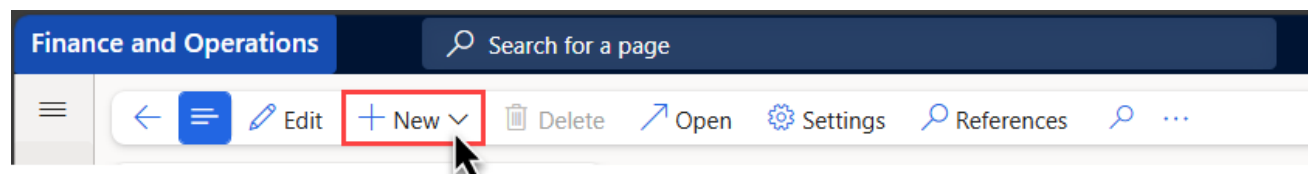
Step 5. Select Document

    a.   Be selecting Document you will be uploading your banking documents, W-9, City of Portland registration, and Oregon Secretary of State registration. Repeat this same process for each document uploaded.

Step 6. Click the Browse button
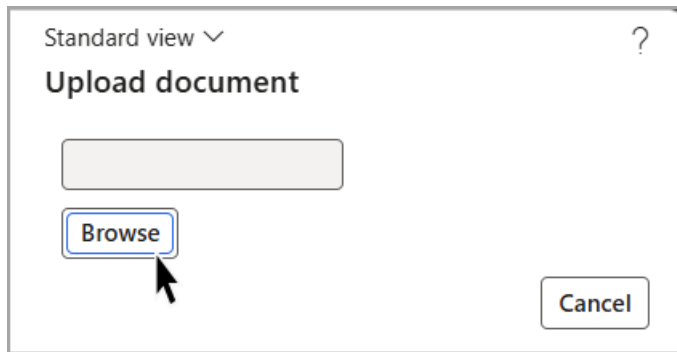
Step 7. Select desired document to upload

Step 8. Document details will appear on screen
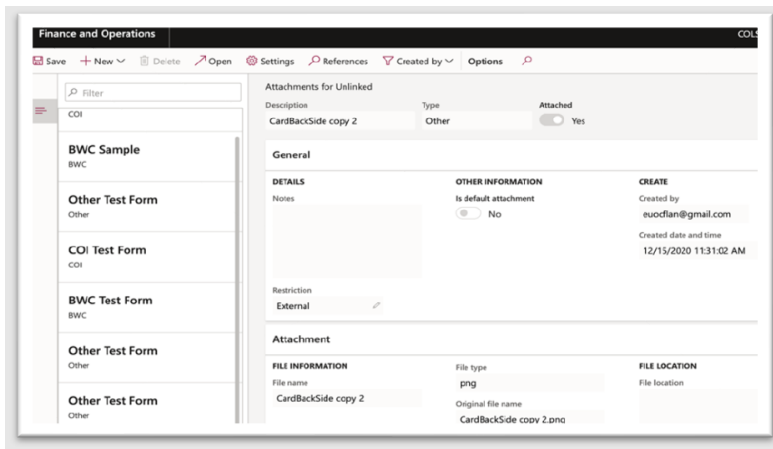
Step 9. You will see the attachment listed on the screen.

    Repeat Step 3 – 9 for each additional attachment.

Step 10. When done, select the arrow back button to close the window
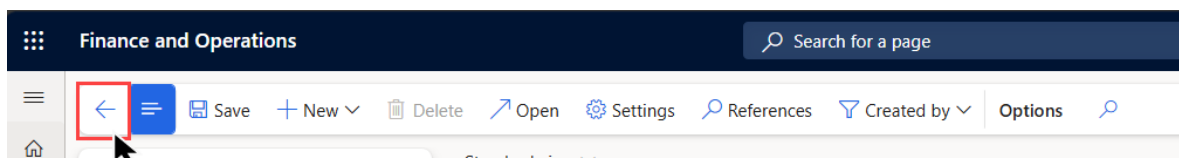
Update your Vendor Profile

Update Address

Vendors may update their address with the documented steps below in the Prosper Portland D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Select the Vendor information tile from the homepage
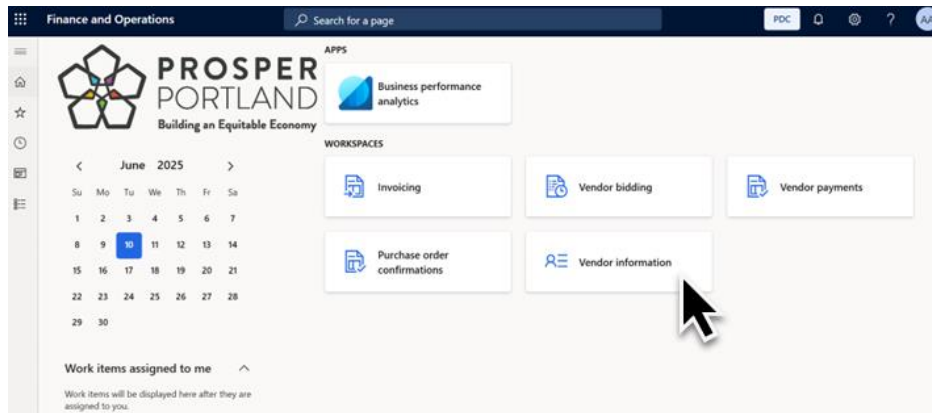
Step 2. Select More Details > Addresses from the dropdown
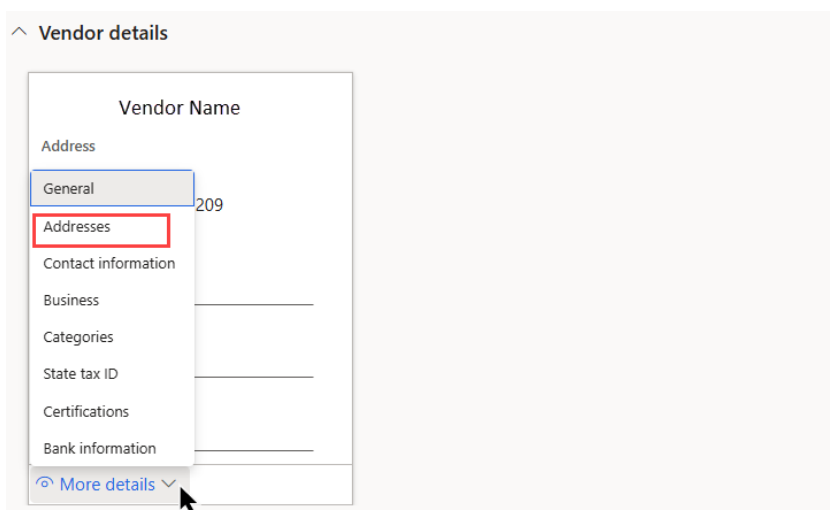
Step 3. Click the three dots in the left-hand corner to select Add from the dropdown
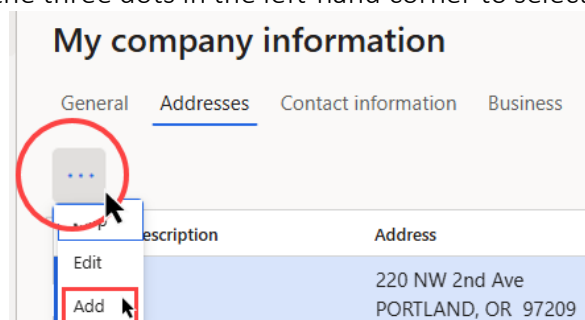
Step 4. Select the Purpose of the address.

Step 5. Enter an address for your business using the Country, Street, Zip Code, City, and State fields.

Step 6. Click the OK button

    a.   The new address will be displayed in the Addresses section.

To update the Vendor Remit address information, follow the steps below:

Step 1. Select Addresses

Step 2. Click the three dots in the left-hand corner to select Edit button from the dropdown
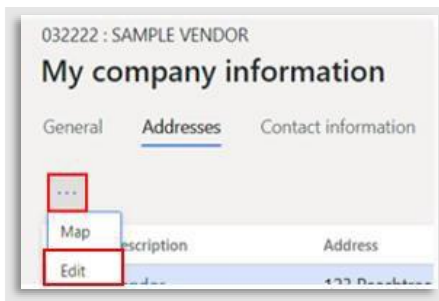
Step 3. From the Purpose dropdown list, select Remit to
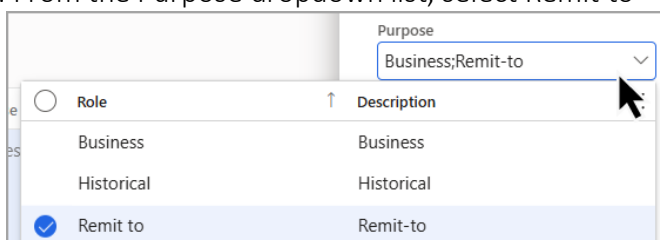
a. Update the Company Contact Information as necessary:

   a. Country/region
   b. Zip/postal code
   c. Street
   d. City
   e. State
   f. Leave County Blank

Step 4. Click OK

Update Contact Information and Banking Information

Vendors may update contact information in the Vendor Portal with the documented below in the Prosper Portland D365 Vendor Portal.

Menu Path: Homepage > Vendor information
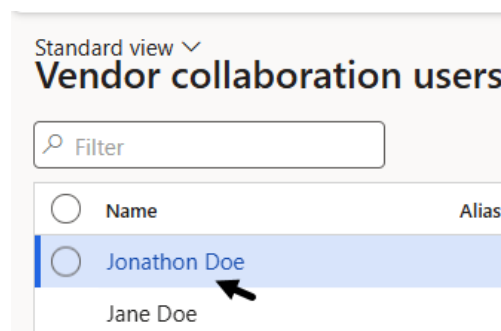
Step 1. Access the Vendor Portal

Step 2. Click the Vendor information tile
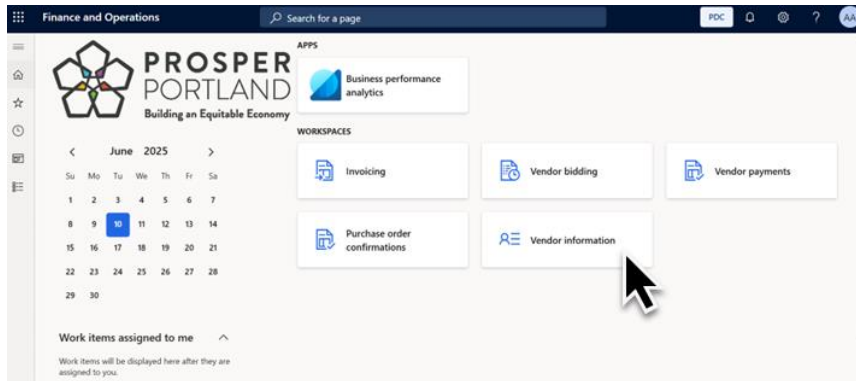
Step 3. Click the Users button
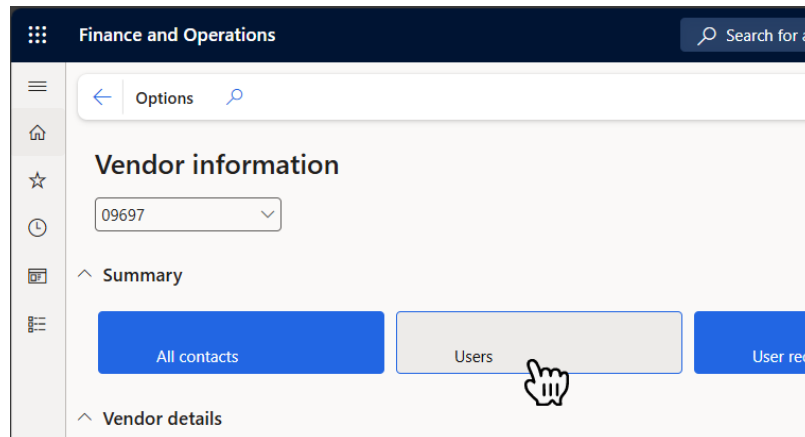
Step 4. Click the blue hyperlink for the desired profile

Step 5. Click to expand the Contact information section

Step 6. Find the field under desired column to edit and click in cell block to edit desired field information

    a. If multiple contacts are provided, select the Primary checkbox for the vendor contact that will be listed as the primary contact.

Step 8. Click the arrow back button to save information and close the Vendor information screen
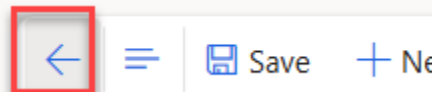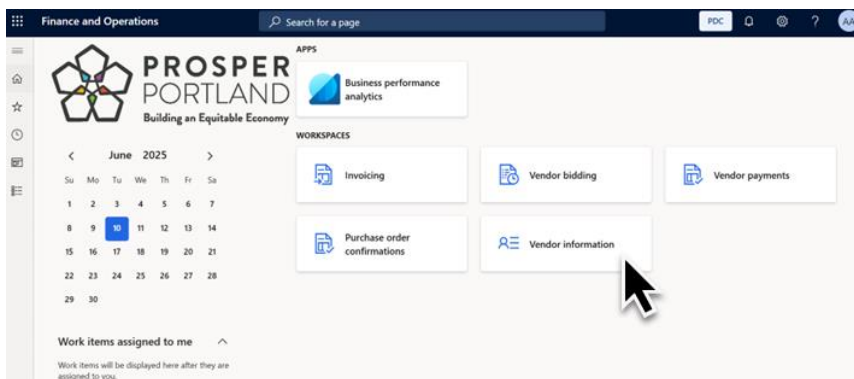

Vendors may update banking information in the Vendor Portal with the documented below in the Prosper Portland D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Access the Vendor Portal

Step 2. Click the Vendor information tile

Step 1. Click the "More details" drop down and select "Bank information"

Step 2. Click the "Add" button on the Company Information page

Standard view ∨

Bank information

📎 Documents

Bank account

[   ]

Bank name

[*]

Bank account number

[*]

Routing number

[*]

IBAN

[*]

SWIFT code

[*]

Effective date

[* 📅]

Expiration date

[📅]

Comments

[   ]

[OK] [Cancel]

Step 3. Input your banking information for ACH

payments

Active Vendors: View and print Purchase Orders

Vendors may view confirmed purchase orders, attachments, and print PO confirmations with the steps documented below in the Prosper Portland D365 Vendor Portal.

Vendors will receive an email notification when a purchase order has been issued. This email will be sent to the email address associated with the vendor's account. See the section Update Contact Information to change the email address associated with your vendor record.

Access Via Menu Path: Home page > Purchase order confirmation

Step 1. Click the purchase order confirmation tile
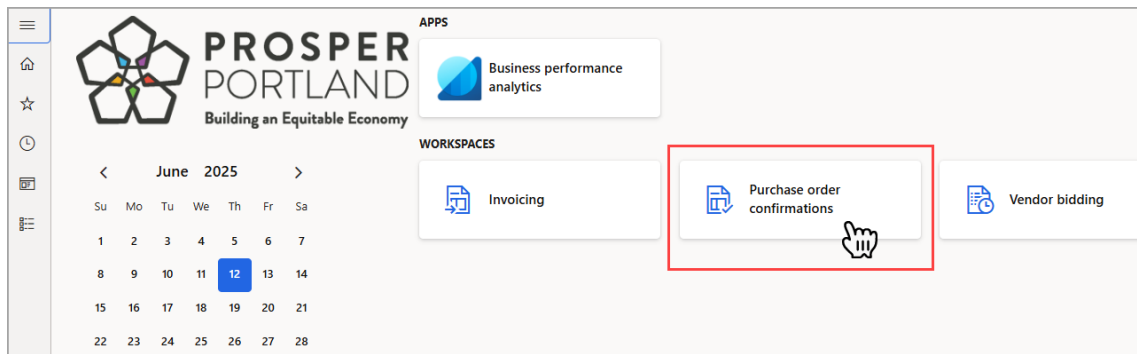
Step 2. Purchase Order Confirmations Journal will open. Highlight desired Purchase Order and select Print/Preview. Select Original Preview.

Step 3. The PO confirmation will be displayed

Step 4. Select the Export dropdown list

Step 5. Select a file type from the dropdown to download the PO confirmation. Once downloaded to your local computer the PO confirmation can be printed.

Vendors may view the status of all payments they have made as well as information such as check number, recipient, and date for each payment made and the details of the Purchase Order the payment was made towards with the documented steps below in the Prosper Portland D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor payments

Step 1. Click the Vendor Payments tile on the homepage
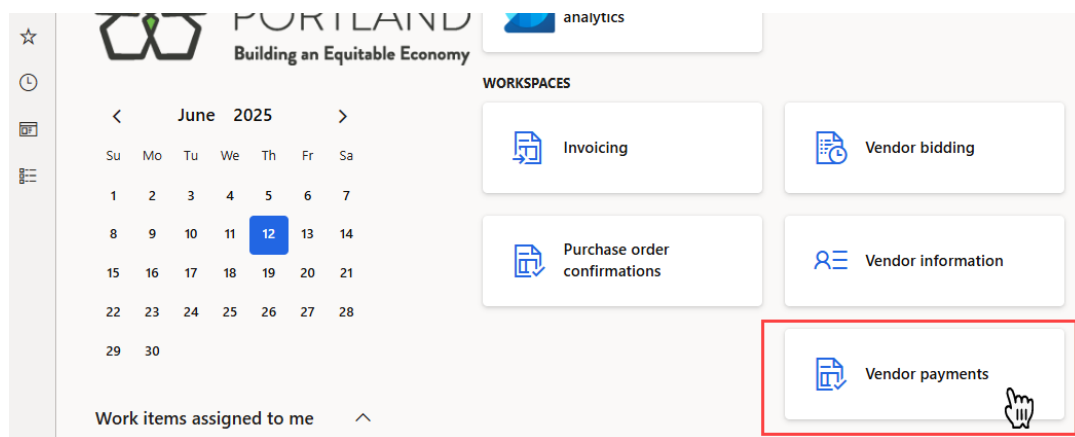
Step 2. Click on the Paid tile
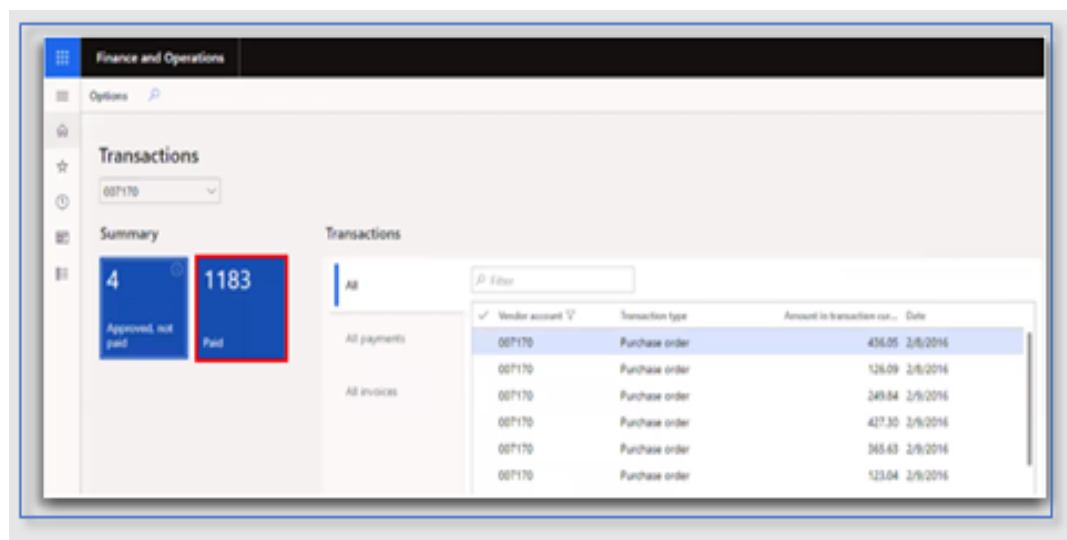
Step 3. The Invoices/Checks page is displayed. The following information will be listed for the vendor:

a. Bank Account
b. Date
c. Check number
d. Status
e. Recipient
f. Currency
g. Amount

Step 4. From the table, select the desired payment line

Step 5. Click the General Tab to view payment details for the payment line selected

a. Bank Account
b. Check number
c. Currency
d. Amount
e. Recipient type
f. Recipient
g. Recipient name
h. Company accounts
i. Voucher
j. Reason code
k. Reason comment

Step 6. Click the Remittance Tab

Step 7. View the Vendor Remittance Location and Address for the payment line selected

Step 8. Click the X to exit out of the page

Step 9. Click on the Approved, not paid tile

Step 10. The Approved, not paid transactions page is displayed. The following information will be listed for the vendor:

     a. Invoice #
     b. Purchase order #
     c. Invoice date
     d. Invoice due date
     e. Invoice status (paid versus unpaid)
     f. Vendor account number

Note: The vendor can view Purchase order details by clicking the PO link in a selected Payment line

Vendor Portal Support

Registration Questions?

Existing City Vendors

Have you previously done business with Prosper Portland using the previous Vendor Services Portal? If so, we ask that all vendors re-register using your primary work address. We no longer require the use of a third-party email provider like Google or Yahoo. Select Sign Up at the top of the page to get started.

New to Doing Business with Prosper Portland?

Registering is quick and easy. You will need your primary work email address, Federal Tax ID/EIN and a copy of your W9. Select Sign Up at the top of the page to get started.

Still need help? Connect with us by email or phone:

Email: VendorServices@prosperportland.us

Phone: 503-823-3276