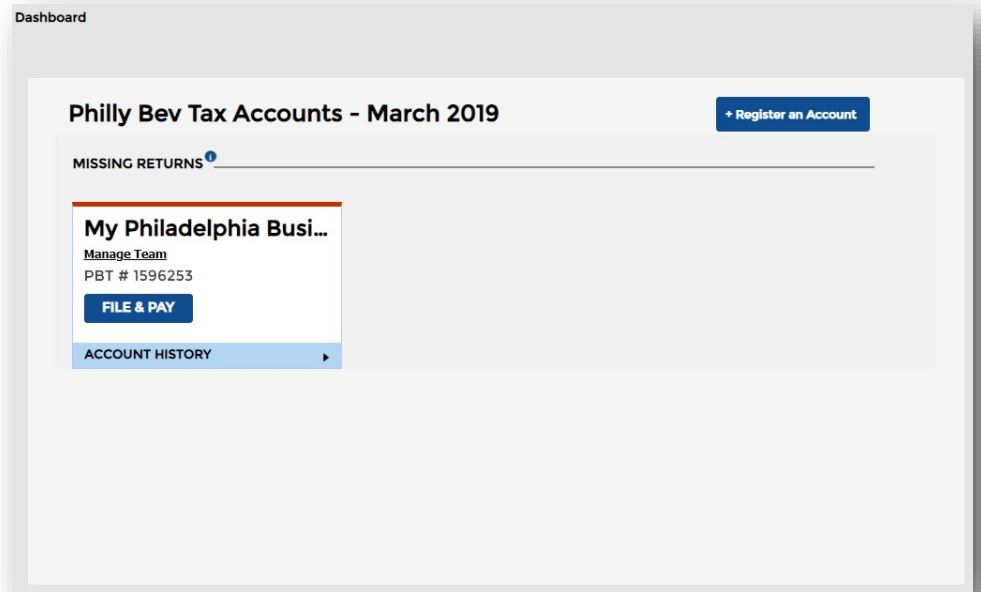


**Philly Bev Tax
Website Instructions
Section 2:
Invite and Unassign
Team Members**

Invite a Team Member to your account

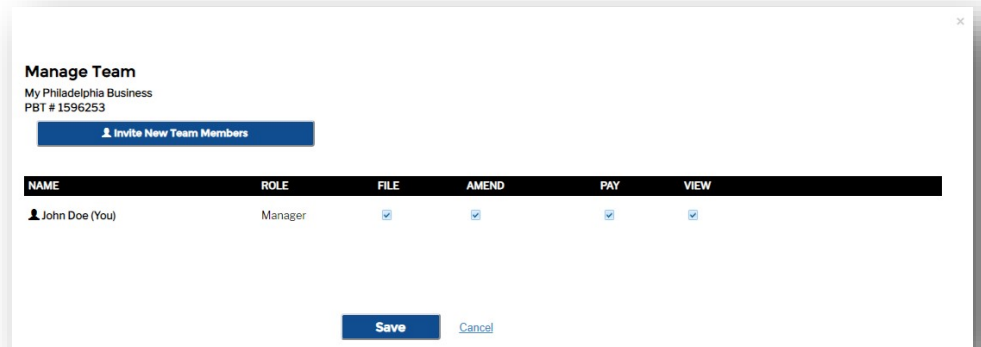
Step 1

- Start at your dashboard
- Select Manage Team



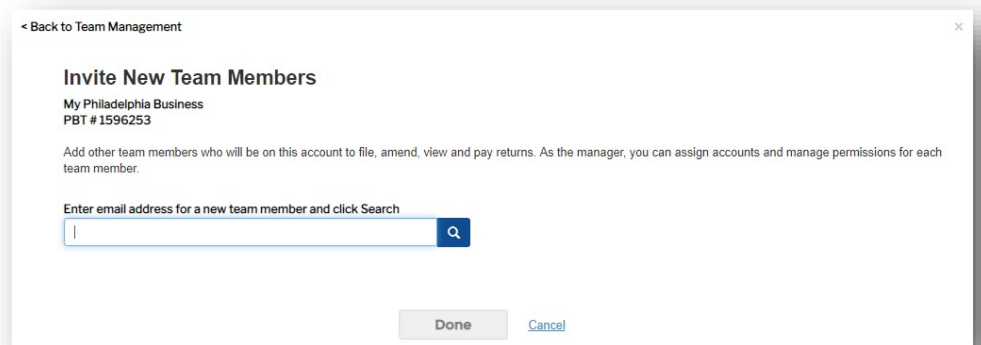
Step 2

- Select "Invite New Team Members"



Step 3

- Enter the email address for your new team member and select the magnifying glass



Step 4

- If the team member has already created an account, their name will appear before their email address
- Select “Done” to continue

< Back to Team Management

Invite New Team Members

My Philadelphia Business
PBT # 1596253

Add other team members who will be on this account to file, amend, view and pay returns. As the manager, you can assign accounts and manage permissions for each team member.

✕

An email will be sent to Bob.smith@myphiladelphiabusiness.com to join your team.

Done [Cancel](#)

Step 5

- Your invited team member will receive an email and must accept the invitation. Until then they will appear as “Pending.”
- In the future, you will be able to restrict team roles by unchecking File, Amend, Pay, or View.
- Select “Save” to continue

An email was sent to cBob.smith@myphiladelphiabusiness.com to join your team.

Manage Team

My Philadelphia Business
PBT # 1596253

[Invite New Team Members](#)

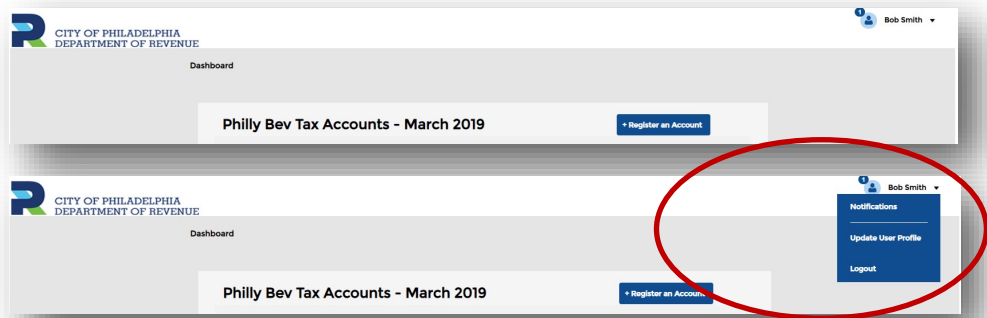
NAME	ROLE	FILE	AMEND	PAY	VIEW
John Doe (You)	Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bob Smith (Pending)	Contributor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save [Cancel](#)

View and Accept a Team Invitation

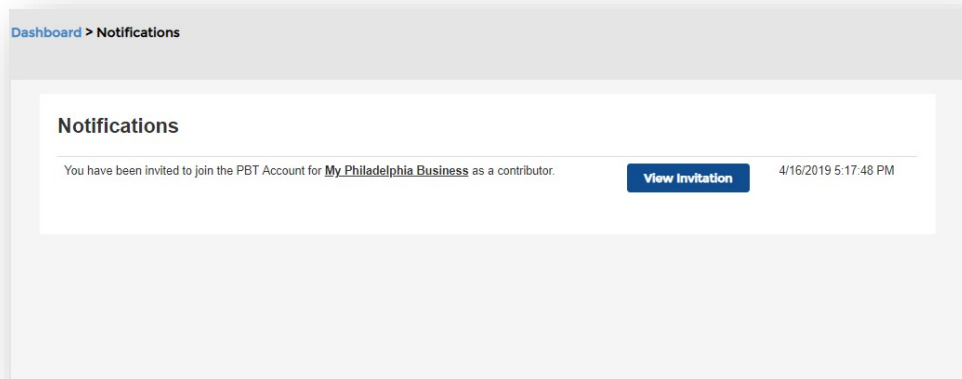
Step 1

- After creating a PBT portal profile, start at your dashboard
- At the top right of your dashboard, select your name
- Select Notifications



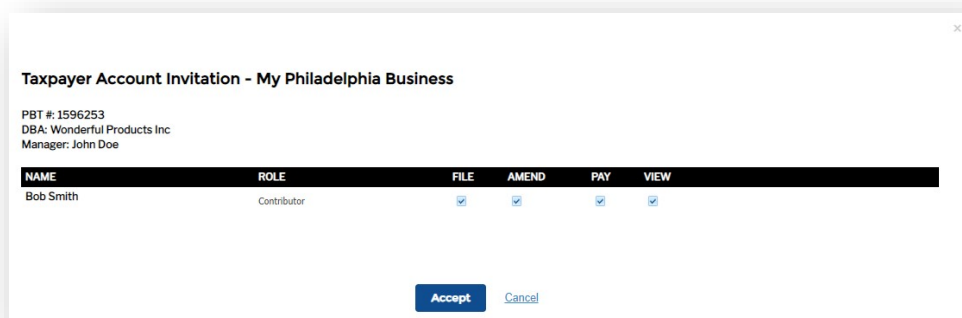
Step 2

- Select View Invitation



Step 3

- Select Accept



Step 4

- Select Dashboard to return to your Dashboard



Step 5

- Select Accept. The Philadelphia Beverage Tax account will now appear on your dashboard.
- You're finished!

