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.

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.
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!