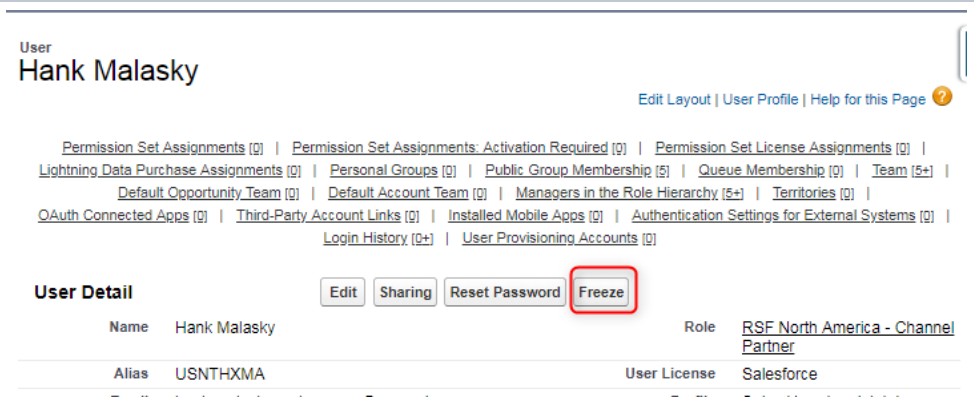
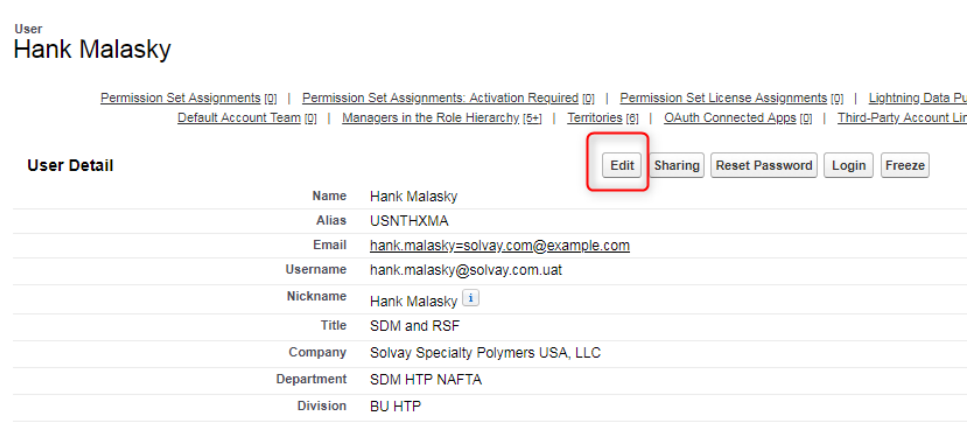
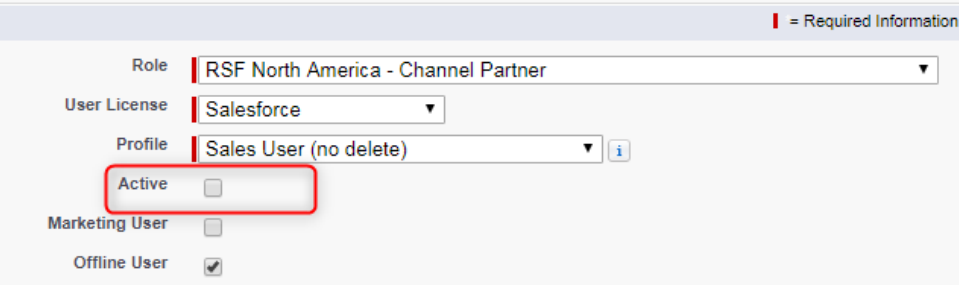
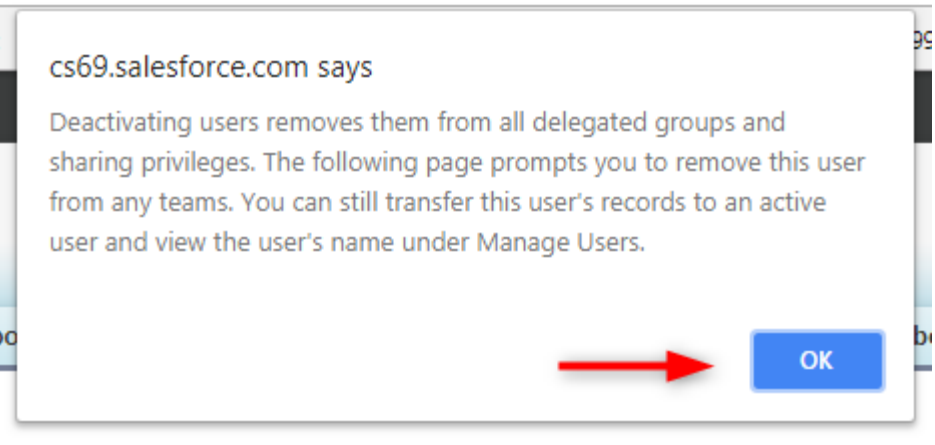
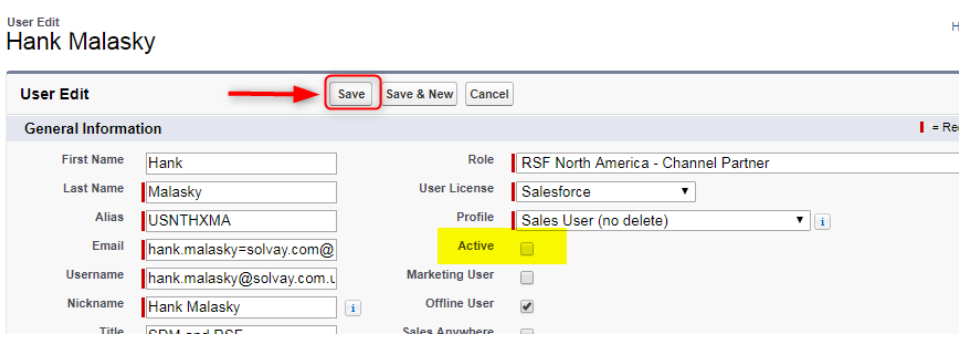
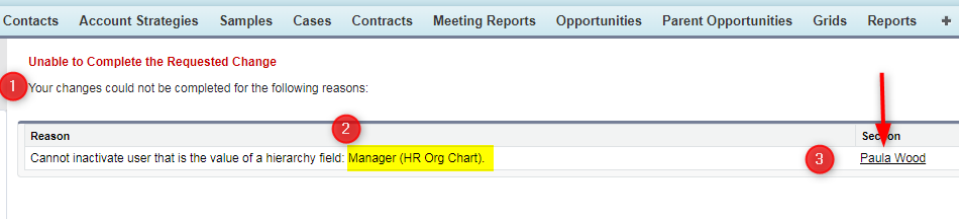
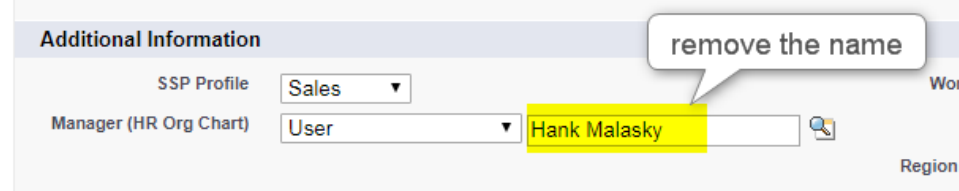
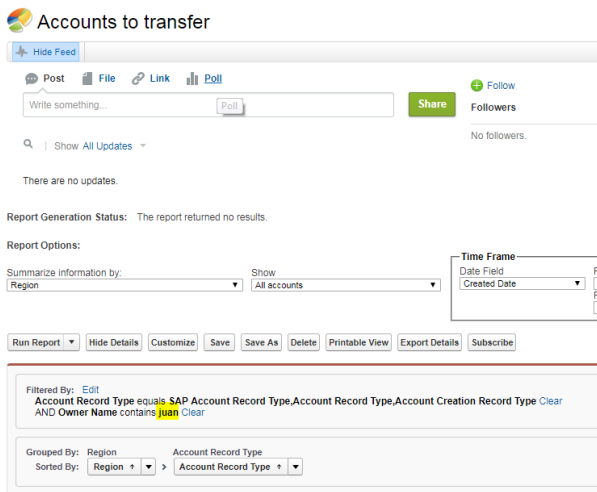
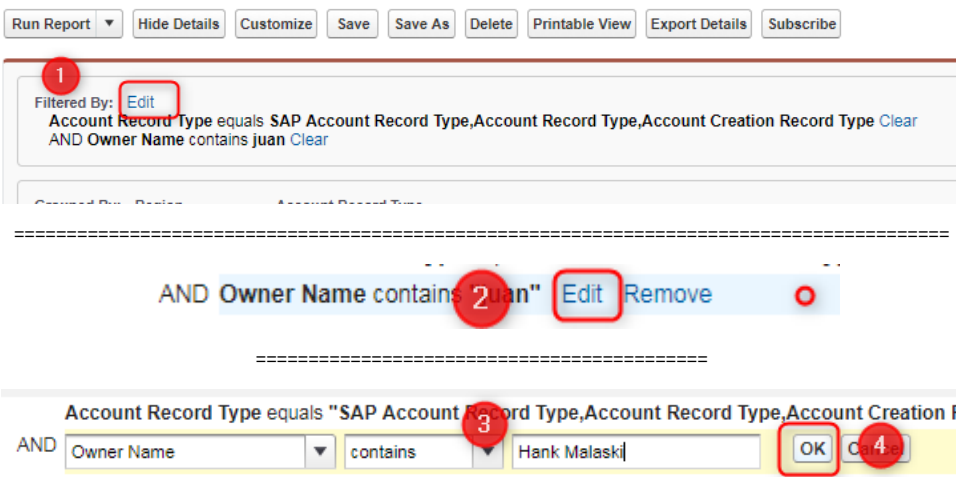
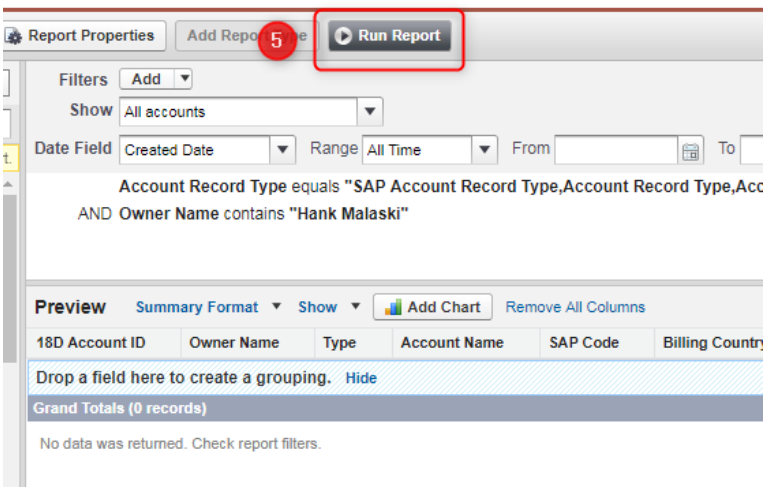


2.1	Freeze User (this action can be reverted at any moment)	 User Hank Malasky Edit Layout User Profile Help for this Page ? Permission Set Assignments (0) Permission Set Assignments: Activation Required (0) Permission Set License Assignments (0) Lightning Data Purchase Assignments (0) Personal Groups (0) Public Group Membership (5) Queue Membership (0) Team (5+) Default Opportunity Team (0) Default Account Team (0) Managers in the Role Hierarchy (5+) Territories (0) OAuth Connected Apps (0) Third-Party Account Links (0) Installed Mobile Apps (0) Authentication Settings for External Systems (0) Login History (0+) User Provisioning Accounts (0) User Detail Edit Sharing Reset Password Freeze Name Hank Malasky Role RSF North America - Channel Partner Alias USNTHXMA User License Salesforce
2.2	[Optional] : Unfreeze User	 Home Chatter Accounts Contacts Account Strategies Samples Cases Contracts Meeting Reports Opportunities + Quick Find / Search... ? Expand All Collapse All  Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce. Get Started User Hank Malasky Edit Layout User Profile Help for this Page ? Permission Set Assignments (0) Permission Set Assignments: Activation Required (0) Permission Set License Assignments (0) Lightning Data Purchase Assignments (0) Personal Groups (0) Public Group Membership (5) Queue Membership (0) Team (5+) Default Opportunity Team (0) Default Account Team (0) Managers in the Role Hierarchy (5+) Territories (0) OAuth Connected Apps (0) Third-Party Account Links (0) Installed Mobile Apps (0) Authentication Settings for External Systems (0) Login History (0+) User Provisioning Accounts (0) User Detail Edit Sharing Reset Password Unfreeze Name Hank Malasky Role RSF North America - Channel Partner
2.1	Slide down to identify the manager of the user to deactivate	Time Zone (GMT-04:00) Eastern Daylight Time (Amer Locale English (United States) Language English i Currency USD - U.S. Dollar Delegated Approver Manager Steve King Approval Request Emails Only if I am an approver Federation ID
2.3	[Optional]	Email the manager to confirm/validate the user's deactivation
3	Click the button 'Edit'	 User Hank Malasky Permission Set Assignments (0) Permission Set Assignments: Activation Required (0) Permission Set License Assignments (0) Lightning Data Purchase Assignments (0) Personal Groups (0) Public Group Membership (5) Queue Membership (0) Team (5+) Default Opportunity Team (0) Default Account Team (0) Managers in the Role Hierarchy (5+) Territories (0) OAuth Connected Apps (0) Third-Party Account Links (0) Installed Mobile Apps (0) Authentication Settings for External Systems (0) Login History (0+) User Provisioning Accounts (0) User Detail Edit Sharing Reset Password Login Freeze Name Hank Malasky Alias USNTHXMA Email hank.malasky@solvay.com@example.com Username hank.malasky@solvay.com.uat Nickname Hank Malasky i Title SDM and RSF Company Solvay Specialty Polymers USA, LLC Department SDM HTP NAFTA Division BU HTP

3.1	Uncheck the box 'Active'	
3.2	Ignore the warning; Click OK	
3.3	Save again	
3.4	- If Unable to Complete the Requested Change - check the reason - identify the field to update - go on the users page (on the far right of the screen) - Otherwise go to 3.5	
3.4.1	Slide down to "Additional Information" Section and empty the field named "Manager (HR Org Chart)"	

3.4.2	Save	User Edit Paula Wood User Edit Save Save & New Cancel General Information First Name Paula Role RSF North America - KAM/ Last Name Wood User License Salesforce Alias USNTPYW Profile Sales User (no delete)
3.4.3	Uncheck "Active" box	User Edit Hank Malasky User Edit Save Save & New Cancel General Information First Name Hank Role RSF North America - Channel Partner Last Name Malasky User License Salesforce Alias USNTHXMA Profile Sales User (no delete) Email hank.malasky=solvay.com@ Active ☒ Username hank.malasky@solvay.com.u Marketing User ☐ Nickname Hank Malasky Offline User ☒ Title SDM and RSF Sales Anywhere User ☐ Company Solvay Specialty Polymers II Knowledge User ☐ Uncheck the box again
3.4.4	Save	User Edit Hank Malasky User Edit Save Save & New Cancel General Information First Name Hank Role RSF North America Last Name Malasky User License Salesforce Alias USNTHXMA Profile Sales User (no delete) Email hank.malasky=solvay.com@ Active ☐ Username hank.malasky@solvay.com.u Marketing User ☐ Nickname Hank Malasky Offline User ☒ Title SDM and RSF Sales Anywhere User ☐
3.4.5	Ignore the warning	cs69.salesforce.com says Deactivating users removes them from all delegated groups and sharing privileges. The following page prompts you to remove this user from any teams. You can still transfer this user's records to an active user and view the user's name under Manage Users. OK

3.4.6	Uncheck Active box	User Edit Hank Malasky User Edit Save Save & New Cancel General Information First Name Hank Last Name Malasky Alias USNTHXMA Email hank.malasky=solvay.com@ Username hank.malasky@solvay.com.u Nickname Hank Malasky Title SDM and RSF Company Solvay Specialty Polymers II Role RSF North America - Channel Partner User License Salesforce Profile Sales User (no delete) Active ☒ Marketing User ☐ Offline User ☒ Sales Anywhere User ☐ Knowledge User ☐ Uncheck the box again
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5	Accounts to transfer	SpP Data Steward takes over from here. L1 support team's job is over.
5.1	Identify the accounts	SFDC Report : Accounts to transfer
5.2	Modify Owner Filter	
5.3	In Filter section of the report : 1. Click on Edit 2. Hoover on the field and click "Edit" 3. Change the name 4. OK 5. Run Report 6. Export details 7. Export 8. Done	 

Report Generation Status: The report returned no results.

Report Options:

Summarize information by:

Region

Show

All accounts

Time Frame

Date Field

Created Date

Range

Custom

From

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Filtered By: [Edit](#)

Account Record Type equals SAP Account Record Type,Account Record Type,Account Creation Record Type [Clear](#)
AND Owner Name contains Hank Malaski [Clear](#)

Accounts to transfer

Export Report

Export File Encoding Unicode (UTF-8)

Export File Format Excel Format .xls

7

Export

Done

Accounts to transfer

Export Report

Export File Encoding Unicode (UTF-8)

Export File Format Excel Format .xls

8

Export

Done

5.4

Report is downloaded on your computer

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Filtered By: [Edit](#)

Account Record Type equals SAP Account Record Type,Account Record Type,Account Creation Record
AND Owner Name contains Hank Malaski [Clear](#)

Grouped By: Region

Account Record Type

Sorted By: Region

Account Record Type

18D Account ID Owner Name Type Account Name SAP Code Billing Country (text only) Billing City Billing

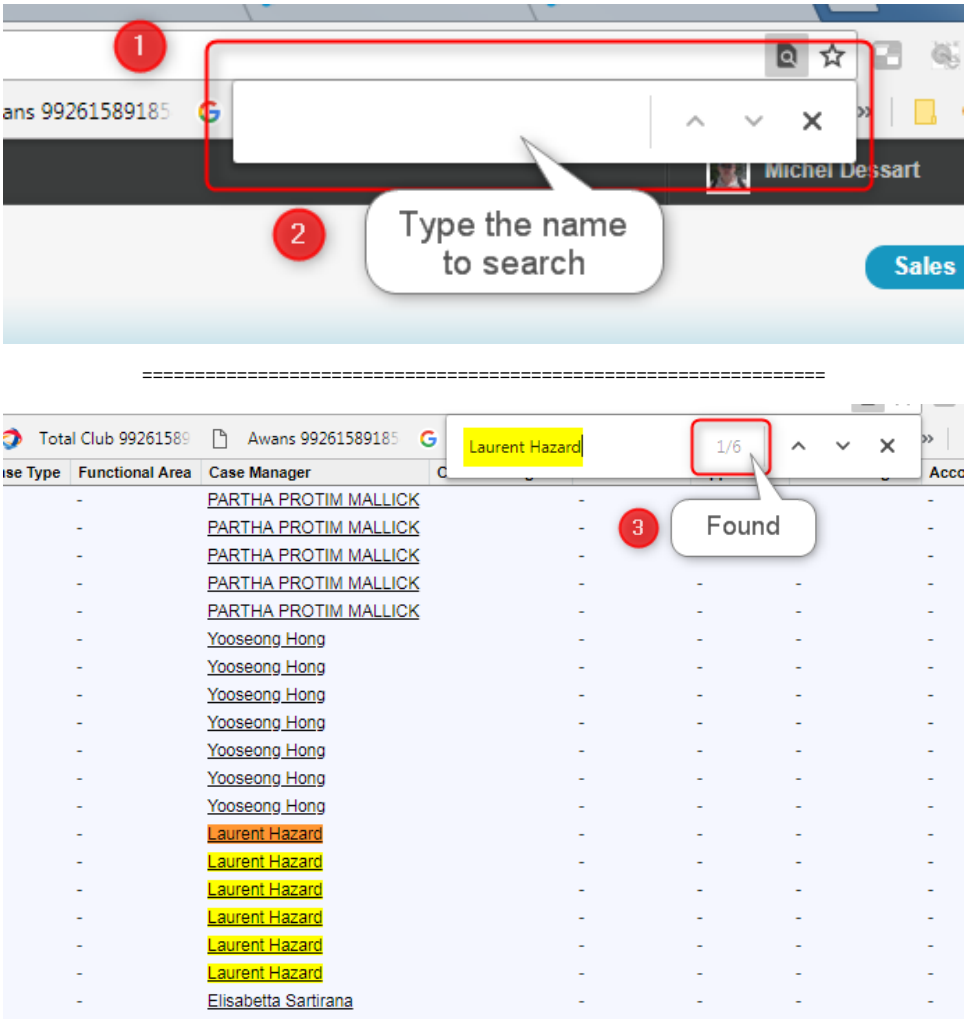
Grand Totals (0 records)

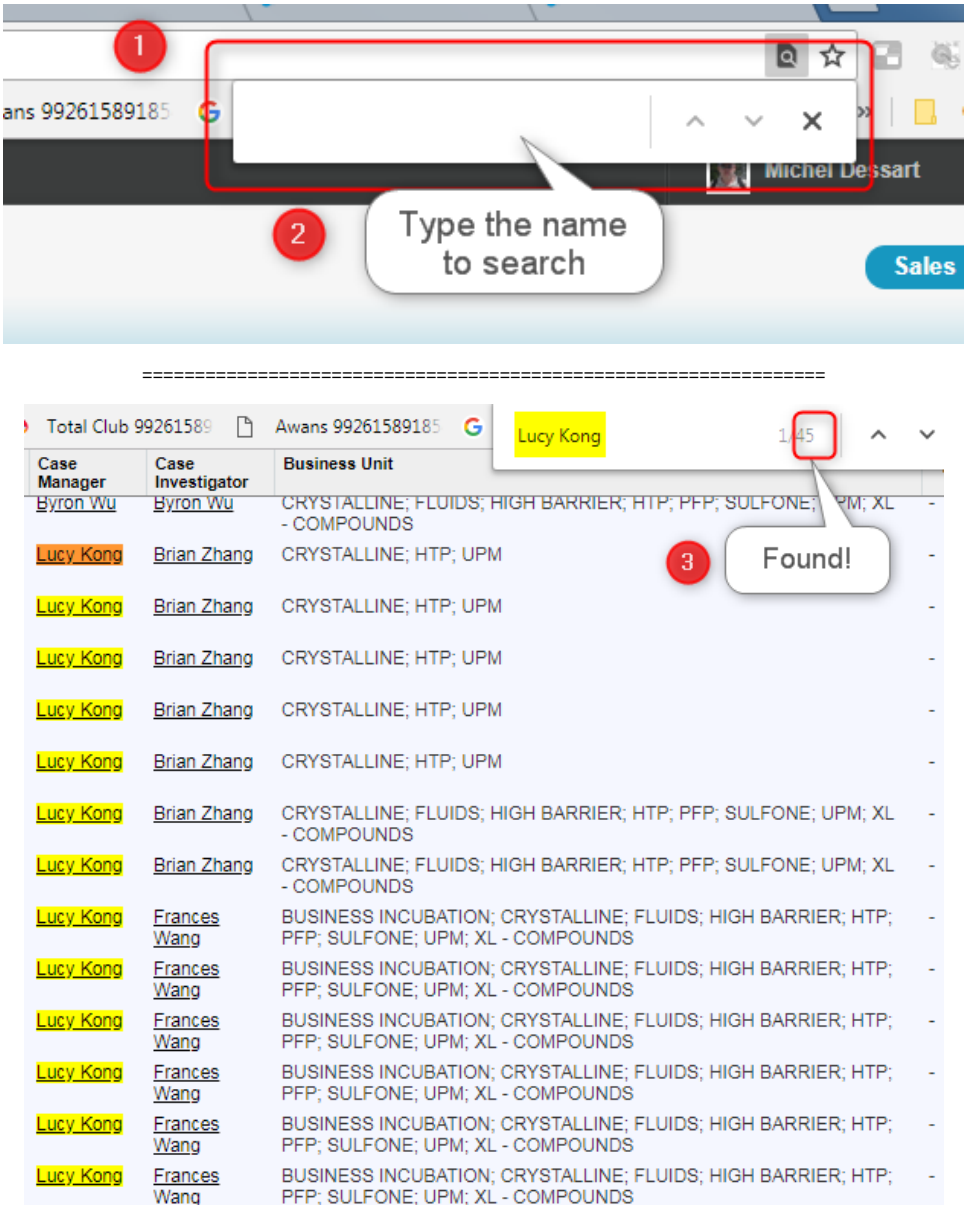
Check rows to filter, then drill down by: --None

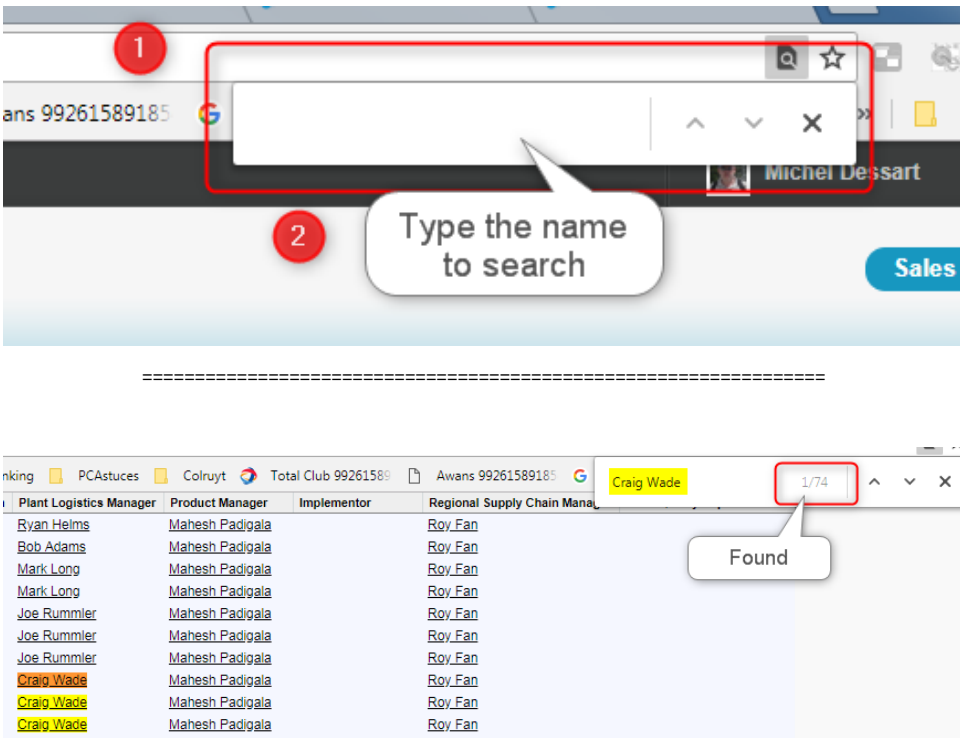
Drill Down

report15282803184....xls

5.5	Email report to manager (identified in point 2.1) and require the identification of new owner	Time Zone (GMT-04:00) Eastern Daylight Time (Amer Locale English (United States) Language English  Currency USD - U.S. Dollar Delegated Approver Manager <u>Steve King</u> Approval Request Emails Only if I am an approver Federation ID
6	Opportunities to transfer	
6.1	Identify the Opportunities	SFDC Report : Dev pool Opportunities to transfer
6.2	Change Name in Owner filter; then proceed the same way as described before in points 5.2 5.5	
7	CTD Rep on Account Page	
7.1	Identify the Accounts with a CTD Rep	SFDC Report : Accounts with CTD Rep
	Change Name in CTD Rep filter ; then proceed the same way as described before in points 5.2 5.5	
8	TRS Case Routing Matrix	Open the report named TRS Cases Routing Matrix and search the presence of deactivated User

8.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	 The screenshot shows a web application interface. At the top, there is a search bar in the top right corner. A red box labeled '1' highlights this search bar. A speech bubble labeled '2' says 'Type the name to search' and points to the search bar. Below the search bar, there is a table with columns: 'Case Type', 'Functional Area', 'Case Manager', and 'Acco'. The table contains several rows of data. A red box labeled '3' highlights the first row, which contains the name 'Laurent Hazard'. A speech bubble labeled 'Found' points to this row.
8.2	Notify the Manager (As identified in point 2.1)	
9	Complaint Routing Matrix	Open the report named "Complaint Routing Matrix" and search the presence of deactivated User

9.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	 The screenshot shows a web application interface. At the top, there's a search bar with a magnifying glass icon. A red box highlights this search bar, and a callout bubble says "Type the name to search". Below the search bar, there's a table with columns: Case Manager, Case Investigator, and Business Unit. The table lists several entries where "Lucy Kong" is the Case Manager and "Brian Zhang" or "Frances Wang" are the Case Investigators. The Business Unit column lists various product types like "CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS". In the top right corner of the table, there's a red box highlighting the number "145", and a callout bubble says "Found!".
9.2	Record(s) found? 1. Notify Complaint Process Owner 2. Require the Process Owner to update the Routing Matrix	
10	SCR Routing Matrix	Open the report named "SCR Routing Matrix" and search the presence of deactivated User

10.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	
10.2	Record(s) found? 1. Notify Complaint Process Owner 2. Require the Process Owner to update the Routing Matrix	

Annex

Communication templates

#1 - User Replacement
Information Request

Dear [Name of GBU User Responsible],

We have been requested to deactivate [Name of User to be deactivated]'s access to the CORE CRM. However, his/her user is critical for some system customizations/functionalities.

In order for us to proceed and ensure the appropriate actions are taken to guarantee correct system function, could you please indicate his/her replacement?

Thank you in advance,

CORE CRM Support Team