

Account Team : Add members - GBU Data Steward

Overview

Who: GBU Data Stewards

What: Add directly the user in Account teams or for mass update fill an Excel template to add members in *Account Teams*, and send it via a freshdesk ticket (Members with role SAP must be maintained in PF1 or RCS systems respectively by Customer service).

note : Since **Sept 18** each user can Add himself in Account team using dedicated button (Only Non SAP roles)..

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Step-by-step

I. Identify accounts and users

Download the Excel template : <https://solvay-crm.my.salesforce.com/0152400001FbH9?srPos=0&srKp=015>

Document

Template account team update - GBU Data Steward

[Edit Properties](#) [Delete](#) [Replace Document](#) [Email Document](#)

Document Detail

Document Name	Template account team update - GBU Data Steward
Document Unique Name	Template_account_team_update_GBU_Data_Steward
Internal Use Only	<input type="checkbox"/>
Document Content Searchable	<input checked="" type="checkbox"/>
Folder	SBS Support
Author	Julien Gasqueton [Change]
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MIME Type	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
Size	12KB
Description	
Keywords	View file
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Open the excel template, and select "Add user to account team" sheet.

Process **Add user to account team** Remove user to account team

II. Fill the Excel template

Fill the 4 first columns of the template. **User ID and Account ID are MANDATORY.**

Reports available to help you :

Use report on Account Teams to find accounts to update :

- **Folder :** GBU Data Steward Reports
- **Report :** Account Teams - Update Members
- **Link :** <https://solway-crm.my.salesforce.com/00O24000004Y4us>

Use report on User:

- **Folder :** GBU Data Steward Reports
- **Report :** List of Users
- **Link :** <https://solway-crm.my.salesforce.com/00O24000000g999>

The screenshots show two Salesforce reports. The first, 'Account Team Updates', displays a table with columns A (ACCOUNTID), B (ACCOUNTNAME), C (USERID), and D (USERNAME). The second, 'List of Users', displays a table with columns E (TEAMMEMBERROLE) and F (ACCOUNTACCESSLEVEL). Red arrows point from the text instructions to the corresponding columns in the reports.

Fill the *Team member role* using the picklist.

Note: *Team member role* does not have any impact on rights on the account, it is just a label.

The screenshot shows a Salesforce picklist for the field 'TEAMMEMBERROLE'. The picklist is open, displaying a list of roles: Sales Support, Key Account Manager, Business Development / Marketing, Global Key Account Manager, Key Account Manager, Research & Innovation, Sales Support, and Technical Marketing.

Fill the *Account access level* using the picklist.

Note: Select read access, or write access.

The screenshot shows a Salesforce picklist for the field 'ACCOUNTACCESSLEVEL'. The picklist is open, displaying a list of access levels: Edit, Edit, Edit, Edit, and Read.

III. Create a new support ticket and attach the template

Once file is completed send the file attached to the ticket

Related articles

Can't find information?

Related docs

- [Web support contact](#)