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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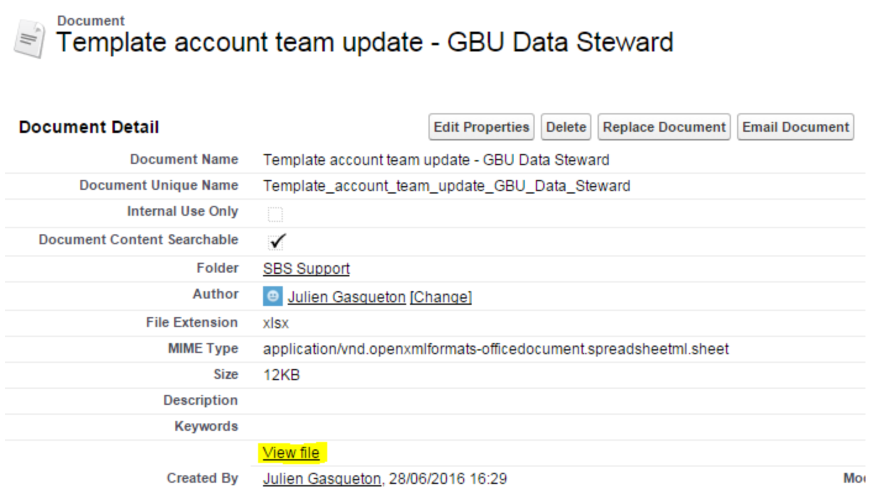
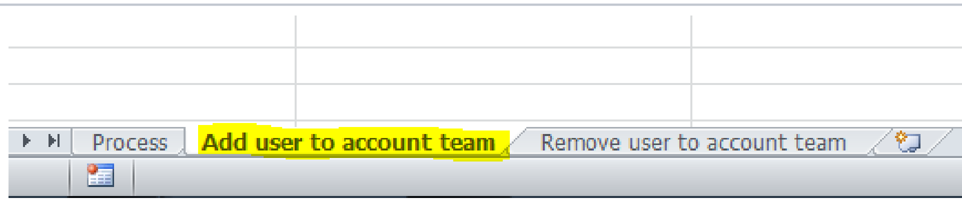
Step-by-step

I. Identify accounts and users

Download the Excel template : https://solvay-crm.my.salesforce.com/01524000001FbH9?srPos=0&srKp=015	
Open the excel template, and select "Add user to account team" sheet.	

II. Fill the Excel template

Fill the 4 first columns of the template. ***User ID* and *Account ID* are <u>MANDATORY</u>.**

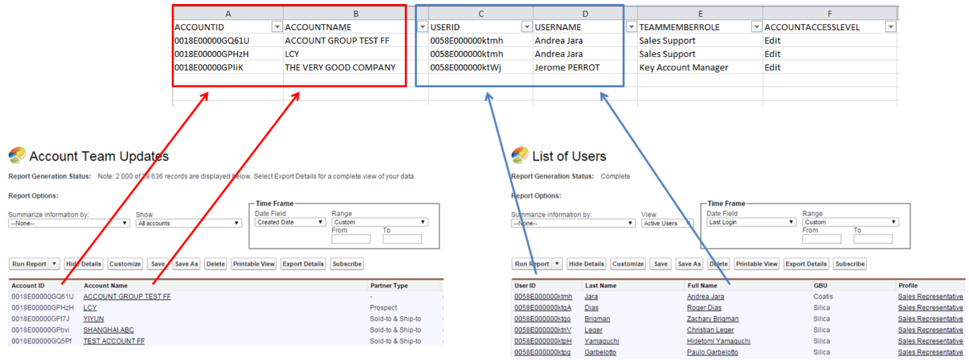
<u>Reports available to help you :</u>

Use report on Account Teams to find accounts to update :

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

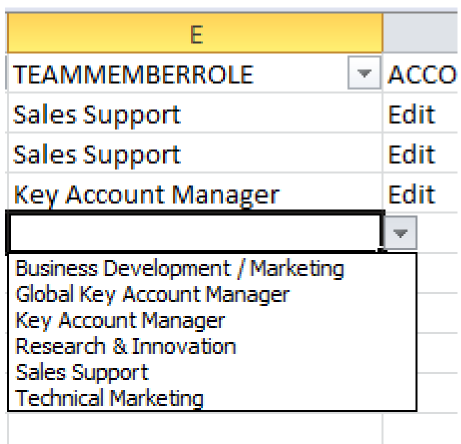
Use report on User:

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



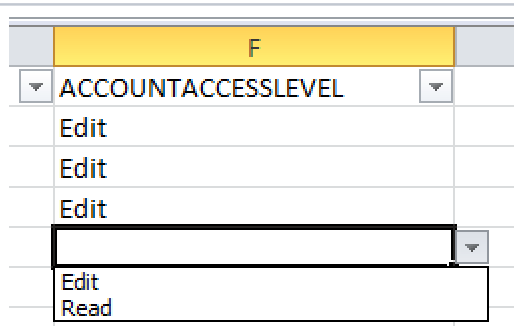
Fill the *Team member role* using the picklist.

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



Fill the *Account access level* using the picklist.

Note: Select read access, or write access.



III. Create a new support ticket and attach the template

Once file is completed send the file attached to the ticket

Related articles

Related docs

Can't find information?

- Web support contact