

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)..

Table of contents

- [Overview](#)
- [Table of contents](#)
- [Step-by-step](#)
 - [I. Identify accounts and users](#)
 - [II. Fill the Excel template](#)
 - [III. Create a new support ticket and attach the template](#)
- [Related articles](#)
- [Can't find information?](#)

Step-by-step

I. Identify accounts and users

Download the Excel template : <https://solvay-crm.my.salesforce.com/01524000001FbH9?srPos=0&srKp=015>



Document

Template account team update - GBU Data Steward

Document Detail

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

Document Name Template account team update - GBU Data Steward

Document Unique Name Template_account_team_update_GBU_Data_Steward

Internal Use Only ☐

Document Content Searchable ☒

Folder [SBS Support](#)

Author [Julien Gasqueton](#) [\[Change\]](#)

File Extension xlsx

MIME Type application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

Size 12KB

Description

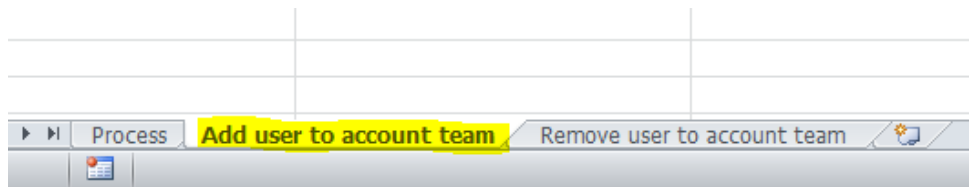
Keywords

[View file](#)

Created By [Julien Gasqueton](#), 28/06/2016 16:29

Moi

Open the excel template, and select "Add user to account team" sheet.



II. Fill the Excel template

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

Account ID

0018E00000G6IU

Account Name

ACCOUNT GROUP TEST FF

User ID

00SBE000000ktnh

User Name

Andrea Jara

Team Member Role

Sales Support

Account Access Level

Edit

Account ID

0018E00000GPHH

Account Name

LCY

User ID

00SBE000000ktnh

User Name

Andrea Jara

Team Member Role

Sales Support

Account Access Level

Edit

Account ID

0018E00000GPHK

Account Name

THE VERY GOOD COMPANY

User ID

00SBE000000ktnh

User Name

Jerome PERROT

Team Member Role

Key Account Manager

Account Access Level

Edit

Account Team Updates

Report Generation Status: Note 2 000 of 6 636 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by:

Columns

Show

All accounts

Time Frame

Date Field

Created Date

Range

Custom

From

To

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

List of Users

Report Generation Status: Complete

Report Options:

Summarize information by:

Columns

View

Active Users

Time Frame

Date Field

Last Login

Range

Custom

From

To

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Account ID	Account Name	Partner Type
0018E00000G6IU	ACCOUNT GROUP TEST FF	
0018E00000GPHH	LCY	Prospect
0018E00000GPHJ	YUN	Sold-to & Ship-to
0018E00000GPHK	SHANDHAM ABC	Sold-to & Ship-to
0018E00000GPHL	TEST ACCOUNT C	

User ID	Last Name	Full Name	GBU	Profile
00SBE000000ktnh	Jara	Andrea Jara	Costs	Sales Representative
00SBE000000ktnh	Clark	Bruce Clark	Sales	Sales Representative
00SBE000000ktnh	Broman	Zachary Broman	Sales	Sales Representative
00SBE000000ktnh	Leiser	Christian Leiser	Sales	Sales Representative
00SBE000000ktnh	Zamaguchi	Hidetoshi Yamaguchi	Sales	Sales Representative
00SBE000000ktnh	Cardelino	Paulo Cardelino	Sales	Sales Representative

E		
TEAMMEMBERROLE		ACCO
Sales Support		Edit
Sales Support		Edit
Key Account Manager		Edit
Business Development / Marketing Global Key Account Manager Key Account Manager Research & Innovation Sales Support Technical Marketing		

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▼	ACCOUNTACCESSLEVEL	▼
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III. Create a new support ticket and attach the template

Can't find information?

- Web support contact