

Account Team : Remove members - GBU Data Steward

Overview

Who: GBU Data Stewards

What: Remove directly the user from Account teams or for mass update fill an Excel template to remove members from *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 Remove himself from Account team using button "AddMyself " (Only for users with Non SAP roles)

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Step-by-step

I. Identify accounts and users

Open the report : <https://solway-crm.my.salesforce.com/00O24000004Y4us>

Account ID	Account Name	User ID	Full Name
0012400000K55vg	JSC VARVARINSKOYE	001240000013114	Daria Melnikova
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.	001240000013114	Daria Melnikova
0012400000K55vi	GOLDEN LEP PRODUCTION	001240000013114	Daria Melnikova

Filter the report on user to be removed :

- Click on *Customize*
- Click on *Add*
- Select *Account Team : Full Name* and enter the user you want to filter on.

You now see all accounts in which the user you selected is in the Account Team.

Account ID	Account Name	User ID	Full Name
0012400000K55vg	JSC VARVARINSKOYE	001240000013114	Daria Melnikova
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.	001240000013114	Daria Melnikova

Filters **Add**

Show **All accounts**

Date Field **Created Date** Range **All Time**

To add filters, click Add.

Filters **Add**

Show **All accounts**

Date Field **Created Date** Range **All Time**

name **equals**

Ultimate Parent Account: Account Name

Account Team

Username

Full Name

First Name

Full Name equals

Name of the user

Filter the report on Account (optional):

If you want to filter the list of accounts before exporting as Excel document, you can add filters with **Add** button.

Filters **Add**

Show

Date Field Range

To add filters, click Add.

AND equals

Accounts

- Account ID
- Account Name
- Partner Type
- Account Record Type
- Corporate Group: Account Name
- Address
- Street
- City
- State/Province (text only)
- Zip/Postal Code

Validate your report clicking on **Run report**.

Report Type: Account team access

Account Teams - Update Members

II. Export the report

Now you have a report with the list of accounts in which the user you selected must be removed from the Account Team.

In the example attached:

- User to be removed:** Rodolfo Romero
- Region of the account : EMEA
- Team role of the user : Business Development / Marketing

Account Teams - Update Members Help for this Page

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range From To

Filtered By: Edit **Full Name equals Rodolfo Romero** **AND Region equals EMEA** **AND Team Role equals Business Development / Marketing**

USER TO BE REMOVED (MANDATORY)

Filter on the region of the account (optional)

Filter on the role of the user to be removed (optional)

Account ID	Account Name	User ID	Full Name	Team Role	PRSID	RCSID	Region	Country	City
001240000K42Wq	ASTURIANA DE ZINC S.A.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	4395	-	EMEA	Spain	AVILES
001240000K42Ws	ESMAL GLASS S.A.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	4819	-	EMEA	Spain	VILLARREAL
001240000K42X4	NITROPARIS S.L.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	20414	-	EMEA	Spain	NULES - CASTELLON
001240000K42XK	MENADIONA S.L.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	23275	-	EMEA	Spain	PALAFOLLS
001240000K42XM	FERRO SPAIN S.A.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	23315	57146	EMEA	Spain	ALMAZORA
001240000K42XN	COLOR ESMALT S.A.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	23321	-	EMEA	Spain	LA FOYA (ALCORA)
001240000K42XU	ASTURIANA DE ZINC S.A.	00524000001CvRe	Rodolfo Romero	Business Development / Marketing	32401	-	EMEA	Spain	SAN JUAN DE NIEVA

Export your report by clicking on **Export Details**.

Account Teams - Update Members

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range From To

III. Create a new support ticket and attach the file

Once filled, send the Excel file via a ticket

- Your request is to remove the user you selected in step 1 from the account teams of the accounts listed in the Excel document.
- **Do not forget to precise who must replace the user removed from those Account teams.**

Related articles

Related docs

Can't find information?

- [Web support contact](#)