

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://solvay-crm.my.salesforce.com/00O24000004Y4us>

Account ID	Account Name	User ID	Full Name
0012400000K55vg	JSC VARVARINSKOYE	001240000011114	Daria Malachuk
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.	001240000011114	Daria Malachuk
0012400000K55vi	GOLDEN STAR GOODCOFFENTEN	001240000011114	Daria Malachuk

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.

Account ID	Account Name
0012400000K55vg	JSC VARVARINSKOYE
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.

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

Account ID	Account Name
0012400000K55vg	JSC VARVARINSKOYE
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.

Account ID	Account Name
0012400000K55vg	JSC VARVARINSKOYE
0012400000K55vh	BECKITT BENCKISER PRODUCTION (POLAND) SP. Z O.O.

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 **USER TO BE REMOVED (MANDATORY)**
 Full Name equals Rodolfo Romero Clear
 AND Region equals EMEA Clear **Filter on the region of the account (optional)**
 AND Team Role equals Business Development / Marketing Clear

Account ID	Account Name	User ID	Full Name	Team Role	PR\$ ID	RC\$ ID	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

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

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](#)