

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

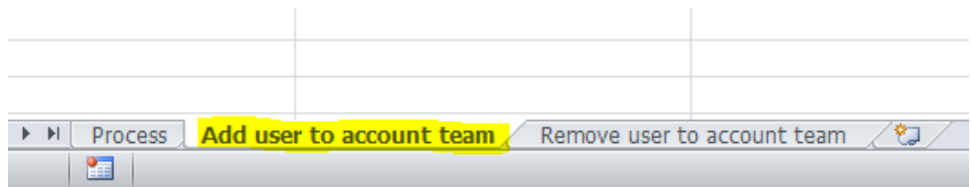
Keywords

[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

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://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>

A	B	C	D	E	F
ACCOUNTID	ACCOUNTNAME	USERID	USERNAME	TEAMMEMBERROLE	ACCOUNTACCESSLEVEL
0018E00000G061U	ACCOUNT GROUP TEST FF	0058E0000000ktmh	Andrea Jara	Sales Support	Edit
0018E00000GPH2H	LCY	0058E0000000ktmh	Andrea Jara	Sales Support	Edit
0018E00000GPHK	THE VERY GOOD COMPANY	0058E0000000ktWj	Jerome PERROT	Key Account Manager	Edit

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.

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	

Fill the *Account access level* using the picklist.

Note: Select read access, or write access.

F	
ACCOUNTACCESSLEVEL	
Edit	
Edit	
Edit	
Edit	
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](#)