**New York Dairy Account Sharing  
Last Updated: April 3, 2016**

1. There are two reports in the Fred Martsoff Team’s Account report folder
   1. New York Dairy || Account Owner
   2. New York Dairy || Account Team Members

Run both reports and combine the results into one Excel file

Remove Duplicates

Save File as CSV

1. Relabel Column A to “ID”
2. Add a column called New York Dairy Indicator and populate with “Yes”
3. Add a column called New York Dairy Date Updated with the date of the data load
4. Data load this file to the Account object and map all three fields
5. Open the report of New York Dairy || Reconciliation
   1. Change the New York Dairy Date Updated to the date of the current data load
   2. Export the Results
   3. Change the New York Dairy Indicator to “No”
   4. Change the label in Column A to “ID”
   5. Clear out the date of the New York Dairy Date Updated
   6. Save as CSV file
   7. Open Data Loader and make sure to include null values in the settings
   8. Using Data Loader, update accounts.

This data load should occur the first of each month.

Note: In January & February, the current account assignments will be loaded into JDE during the month of February, therefore, the current year assignments will not be reflected until the March 1 load.