

Junction Solutions presents



Enhanced **Notes** Report

User Guide

Package Version 5.10
April 2025

Product Overview

Shortly after enabling [Notes](#) in their Salesforce orgs, Admins often come to the unexpected realization of the reporting limitations of the “enhanced” note-taking capabilities.

Without even the basic features of filtering by note keywords or parent record criteria, the Notes and their valuable information that your reps are logging in Lightning Experience are deeply inaccessible and serve useless beyond a marginal productivity-boost.

The **Enhanced Notes Report** solution looks to solve that problem by providing Salesforce admins and business users the capabilities to; build, run, save, and export reports on Enhanced Notes in Lightning Experience with **rich-text content** and **parent-record filtering** for any object.

Report for Opportunity Notes (5)				
Search Notes		Notes per page		
		10		
Go		1		
Parent Name	Title	Content	Last Modifie...	
1	Untold Hotels Generator Installations	Complaints about Customer support	Issues with interactions with our customer support team: 1. Response Time: John expressed frustration with delayed response times from our support team. He mentioned waiting for extended periods to get a reply to his inquiries. 2. Communication: He highlighted instances where he felt that the support team's communication lacked clarity and left him confused about the resolution process. 3. Issue Resolution: John reported that a few of his past issues were not adequately resolved, leading to recurring problems.	Sep 11, 2023, 08:45:23 p.m.
		- Company Name: XYZ Enterprises - Contact Name: Jane Doe - Title: CEO - Contact Email: jane.doe@xyzenterprises.com - Contact Phone: (555) 123-4567 - Website: www.xyzenterprises.com Business Overview: XYZ Enterprises is a well-established company in the IT services industry, specializing in		

Enhanced reporting of Notes allows for deeper insights into the interactions your reps are having with customers and internal teams, unlocking the full potential of Lightning Notes.



Installation

Install the managed package from the [AppExchange listing](#) to your Production or Sandbox org.

Be sure to select **Install for Admins Only**.



Install Enhanced Notes Report

By Enhanced Notes Report



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

Install

Cancel

App Name	Publisher	Version Name	Version Number
Enhanced Notes Report	Enhanced Notes Report	March 2024	2.0

Requirements

- Lightning Experience enabled
- [Enhanced Notes](#) are enabled in the org
- Supported Editions
 - Developer
 - Unlimited
 - Professional
 - Enterprise



Security & Permissions

Permissions for App Features

Assign the **Enhanced Notes Report Admin** permission set group to grant full permissions to a user. Otherwise, assign the following permissions sets to enable the specific features:

Permission Set	Granted Permissions
View Enhanced Notes Reports	• Building real-time reports • Viewing and Saving Snapshots • Viewing and using saved Filters
Create & Edit Enhanced Notes Reports	• Saving Report Snapshots • Creating, updating, deleting Filters
Delete Enhanced Notes Reports	• Deleting Note Reports and Snapshots
Exporting Report Results	• Exporting real-time & Snapshot report results into .xls or .csv files or printable views for pdf export • Managing report email schedules

Users will be able to perform the actions listed above to the Notes, Snapshots, and Filters they have sharing access to via Org-wide-default and sharing configurations.

Licensing

This solution is a Paid AppExchange product. An annual subscription of \$300 or a one time \$500 fee per company is required to use this app. The subscription will auto-renew unless canceled.

The License grants all users in the org with the appropriate permissions assigned the ability to build, run, save, and export reports for Enhanced Notes.



Note Sharing & Visibility

Note records returned in the reports include all Notes that meet the filter criteria and are accessible to the running user.

Assuming no view-all or query all permission are assigned to the running user, the following Notes are/aren't returned in the report results:

Included in Results	Excluded in Results
✓ Notes linked to Records that the user has visibility to. ✓ Private Notes created by or shared with the running user.	✗ Notes linked to Records that users do not have visibility to. ✗ Notes linked to Records created by others with "Prevent note from being viewed by other users with access to this record." checked. ✗ Private Notes created by other users and not shared with the running user

App Security

The solution is a **100% native app** built with Apex, Lightning Web Components, and Visualforce Components which operate completely within your Salesforce instance under the running user's context, and without the use of 3rd party tools or any data leaving your org.

It has also completed all the required security requirements mandated by Salesforce in order to be published on the AppExchange. These reviews are designed to protect customers from security vulnerabilities by ensuring proper security-focused designs are implemented. You can learn more about the [AppExchange Security Review here](#).



Product Features

View
Rich-Text
Content of
Notes

Add Notes to
records in
Standard
Reports

Save & Share
Custom
Filters

Filter on
Parent Record
Criteria

Add
Additional
Parent
Record
Columns to
Report

Schedule
Emails of
Note Reports

Save
Report
Snapshots

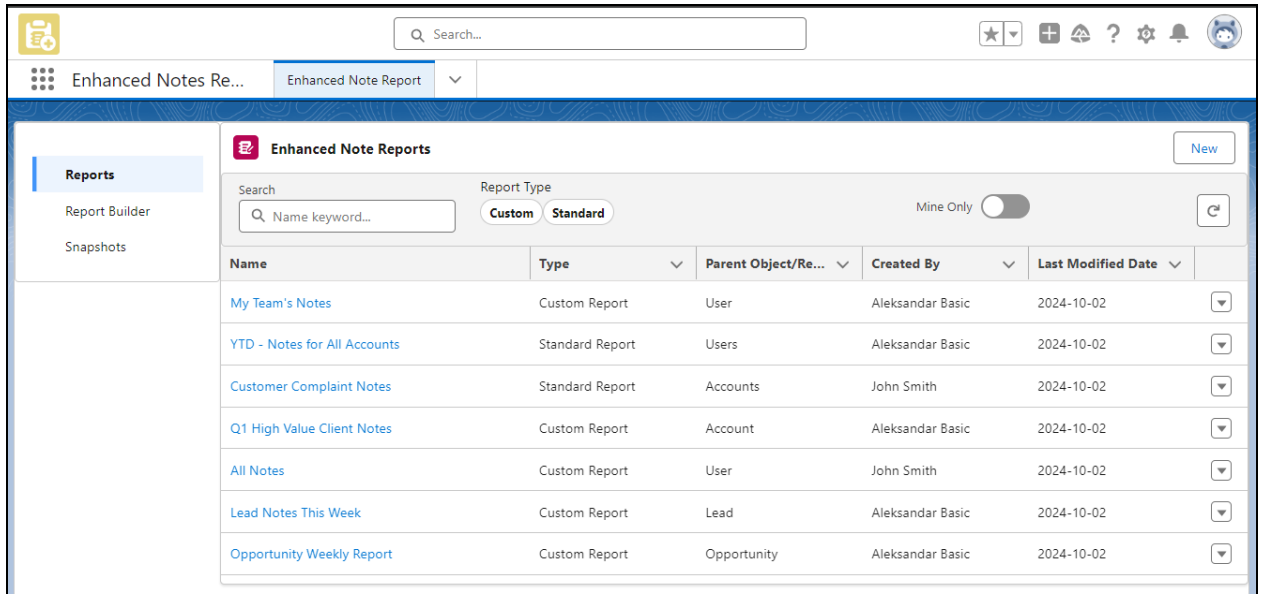
Export
Results

Filter on
Note
Content &
Title
Keywords



Getting Started

1. After assigning the appropriate [permissions](#), navigate to the “Enhanced Notes Report” tab or app from the app launcher.
2. The landing page is a report browser to find your and your team’s reports. They are by default sorted by last viewed date, but you can modify the filters and column sort directions to find what you’re looking for.



The screenshot displays the 'Enhanced Note Reports' interface. At the top, there is a search bar and a 'Search...' button. Below this, a navigation bar shows 'Enhanced Notes Re...' and 'Enhanced Note Report'. The main content area is titled 'Enhanced Note Reports' and includes a 'New' button. A sidebar on the left lists 'Reports', 'Report Builder', and 'Snapshots'. The main area features a search bar, a 'Report Type' filter (Custom/Standard), and a 'Mine Only' toggle. A table lists various reports with columns for Name, Type, Parent Object/Re..., Created By, and Last Modified Date.

Name	Type	Parent Object/Re...	Created By	Last Modified Date
My Team's Notes	Custom Report	User	Aleksandar Basic	2024-10-02
YTD - Notes for All Accounts	Standard Report	Users	Aleksandar Basic	2024-10-02
Customer Complaint Notes	Standard Report	Accounts	John Smith	2024-10-02
Q1 High Value Client Notes	Custom Report	Account	Aleksandar Basic	2024-10-02
All Notes	Custom Report	User	John Smith	2024-10-02
Lead Notes This Week	Custom Report	Lead	Aleksandar Basic	2024-10-02
Opportunity Weekly Report	Custom Report	Opportunity	Aleksandar Basic	2024-10-02

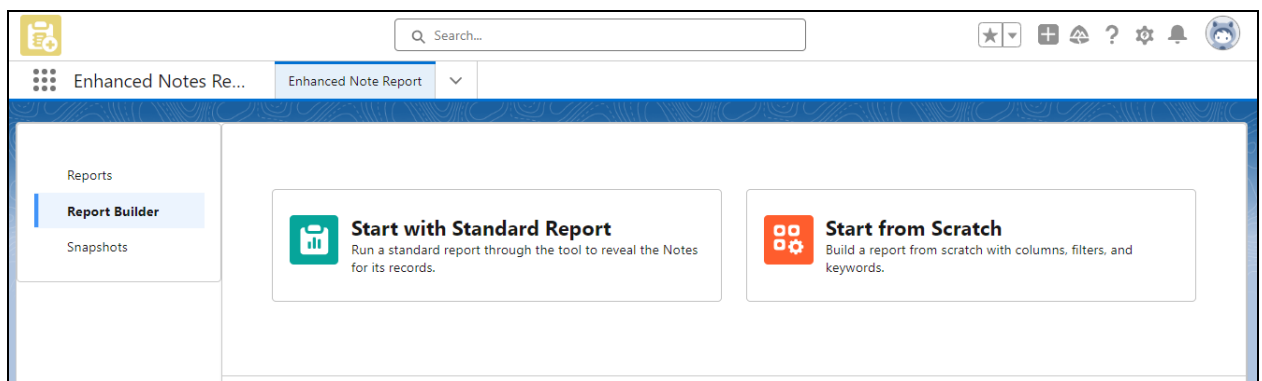


3. Clicking "New" navigates you to the Report Builder tab where you can begin to create a report for Notes.

Select the type of report type for your Note Report based on your use case.

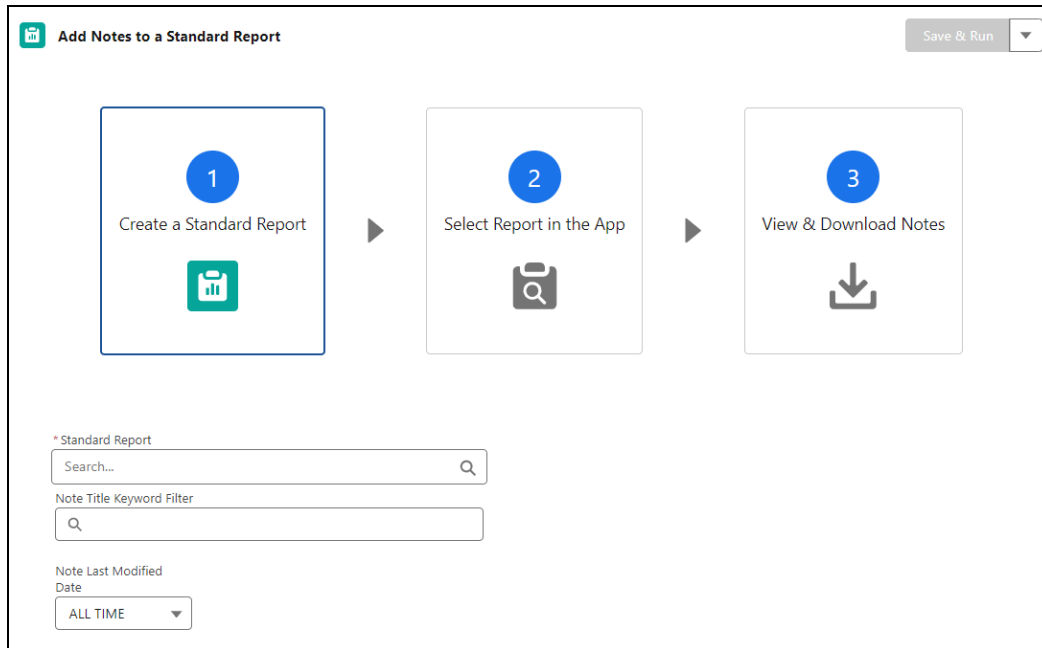
Standard Report – appends Notes to rows of an existing standard report on top of the existing records in the report. Configure parent criteria and columns within the standard report builder.

Custom Report – Returns only Notes and its parent details for a defined group of parent records. Does not return results for parent records without Notes. Filter and column configuration is limited compared to standard reports.



Creating a Standard Note Report

1. To create a Standard Note Report, you simply feed an existing standard report into the app to append Note content and details relating to the records in the report results.



Begin by creating a standard report for the records you want to append Notes to. It can be for any standard or custom object, and apply any filters you wish.

For the Notes report to run, it is **critical** the Record ID is the report's first column.

Report: Opportunities with Products Opportunities with Products Report						Enable Field Editing	Q	Add Chart	▼	Edit	▼
Total Records 31											
	Opportunity ID	Opportunity Name	Opportunity Owner	Stage	Close Date						
1	006Ho00000SnqSJ	University of AZ SLA	Aleksandar Basic	Closed Won	2023-06-14						
2	006Ho00000SnqS8	University of AZ Portable Generators	Aleksandar Basic	Closed Won	2023-06-10						
3	006Ho00000SnqSH	University of AZ Installations	Aleksandar Basic	Proposal/Price Quote	2023-06-07						
4	006Ho00000SnqSR	United Oil Standby Generators	Aleksandar Basic	Closed Won	2023-09-02						
5	006Ho00000SnqS0	United Oil SLA	Aleksandar Basic	Closed Won	2023-09-01						
6	006Ho00000SnqSG	United Oil Refinery Generators	Aleksandar Basic	Closed Won	2023-08-18						
7	006Ho00000SnqS3	United Oil Refinery Generators	John Smith	Proposal/Price Quote	2023-08-25						
8	006Ho00000SnqSP	United Oil Plant Standby Generators	John Smith	Needs Analysis	2023-08-04						
9	006Ho00000SnqS1	United Oil Office Portable Generators	John Smith	Negotiation/Review	2023-07-11						
10	006Ho00000SnqSE	United Oil Installations	Aleksandar Basic	Closed Won	2023-07-06						
11	006Ho00000SnqSL	United Oil Installations	Aleksandar Basic	Closed Won	2023-07-18						

Filters

Show Me
All opportunities

Close Date
Previous FY (Jan 1, 2023 - Dec 31, 2023)

Opportunity Status
Any

Probability
All

Amount
greater or equal "\$5,000.00"



- Next, navigate back to the app's tab, and search for + select the report you've built.

Add Notes to a Standard Report
Save & Run

1

Create a Standard Report

2

Select Report in the App

3

View & Download Notes

Standard Report
with Proj

Opportunities with Products Report
Public Reports

Note Last Modified Date

ALL TIME

- Once selected, the app will make sure that the report has been configured properly.

Add Notes to a Standard Report
Save & Run

1

Create a Standard Report

2

Select Report in the App

3

View & Download Notes

Standard Report
Opportunities with Products Report

Note Title Keyword Filter

Note Last Modified Date

ALL TIME

Ensure the report meets the requirements:

- First Column (required)**
The First column needs to be an Id column. This defines the parent Id of the Notes to return.
- Second Column (optional)**
This column will hyperlinked to the record. It is best to make it the record Name.
- < 8 Columns (optional)**
Only the first 7 columns are returned in the Notes Report.
- < 300 results (required)**
Add additional filters to reduce the results returned in your Report.



4. Lastly, apply any keyword or last modified date filters on the Notes to return, and click Save & Run.

Note Title Keyword Filter

Note Last Modified Date

* Date

* Time

LESS THAN

Oct 1, 2024

12:00 a.m.

5. On completion, the report will display the standard report results, appending Note columns and rows under the records that have Notes meeting the filter criteria.

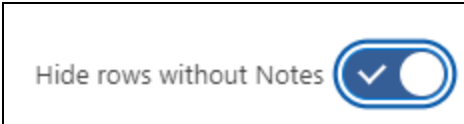
Notes for Opportunities with Products Report

Edit

Hide rows without Notes

Opportunity Name	Opportunity...	Stage	Close Date	Note Title	Note Content																		
University of AZ SLA	Aleksandar Basic	Closed Won	2023-06-14	-	-																		
University of AZ Portable Gen...	Aleksandar Basic	Closed Won	2023-06-10	-	-																		
University of AZ Installations	Aleksandar Basic	Proposal/Price Q...	2023-06-07	-	-																		
United Oil Standby Generators	Aleksandar Basic	Closed Won	2023-09-02	United - Field Sales Visit #2	Summary: Met with the procurement team at XYZ Corporation to discuss their upcoming project and our product range and tailored solutions. Secured a verbal agreement for a quote. Next Steps: 1. Formal Proposal: Draft a formal proposal incorporating discussed terms and pricing, ensuring clarity and agreement. 2. Follow-up Meeting: Schedule a follow-up meeting for March 5th to review the formal proposal, address questions, and finalize the agreement. 3. Contract Documentation: Prepare necessary contract documentation for review and signature. 4. Coordinate Internal Teams: Communicate internally with logistics and production teams to ensure project timelines.																		
United Oil SLA	Aleksandar Basic	Closed Won	2023-09-01	-	-																		
United Oil Refinery Generators	Aleksandar Basic	Closed Won	2023-08-18	-	-																		
United Oil Refinery Generators	John Smith	Proposal/Price Q...	2023-08-25	-	-																		
United Oil Plant Standby Gen...	John Smith	Needs Analysis	2023-08-04	Onboarding Tasks	<table><tr><th>Task</th><th>Date</th><th>Status</th></tr><tr><td>Kickoff Meeting</td><td>March 1, 2024</td><td>In Progress</td></tr><tr><td>Needs Assessment</td><td>March 5, 2024</td><td>Pending</td></tr><tr><td>User Training</td><td>March 10, 2024</td><td>Upcoming</td></tr><tr><td>Go-Live Preparation</td><td>March 15, 2024</td><td>Planned</td></tr><tr><td>Ongoing Support and Maintenance</td><td>March 20, 2024</td><td>Future</td></tr></table>	Task	Date	Status	Kickoff Meeting	March 1, 2024	In Progress	Needs Assessment	March 5, 2024	Pending	User Training	March 10, 2024	Upcoming	Go-Live Preparation	March 15, 2024	Planned	Ongoing Support and Maintenance	March 20, 2024	Future
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				A Fairytale Story	Far far away, behind the word mountains, far from the countries Vokalia and Consonantia, there live the happy families Bookmarksgrove right at the coast of the Semantics, a large language ocean. A small river named Dolors supplies it with the necessary regalia. It is a paradisematic country, in which roasted parts of sentences fly all-powerful. Pointing has no control about the blind texts it is an almost unorthographic life. One day when a text came to the Big Oxmoor and those who were thousands of bad Commas, wild Question Marks and devious Semikoli, but the Little Blind Text, put her initial into the belt and made herself on the way. When she reached the first hills of the great Mountains, great was the sight below. A valley of the Laneway, the headline of Alphabet Village and the Lane. Pityful a rethoric question ran over her cheek, then. More can be found on https://www.disney.com/																		
				Initial Call Notes	Company Name: XYZ Enterprises																		

- 6. The Hide rows without Notes toggle shows/hides the rows of the Notes report which do not have any Note records fitting the filter criteria.



Notes for Opportunities with Products Report

Edit

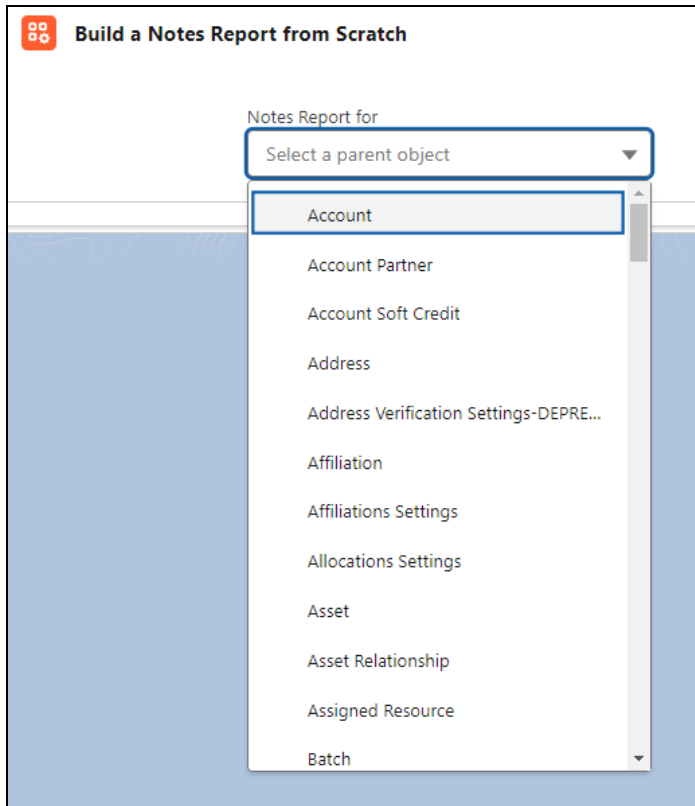
Hide rows without Notes

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				Initial Call Notes	Company Name: XYZ Enterprises Contact Name: Jane Doe Title: CEO																		

- 7. Export the reports as they appear in a printable format, worksheet, or pipe-separated file.

Creating a Custom Note Report

1. Begin by selecting which Parent Object (standard or Custom) you wish to report on Notes for.



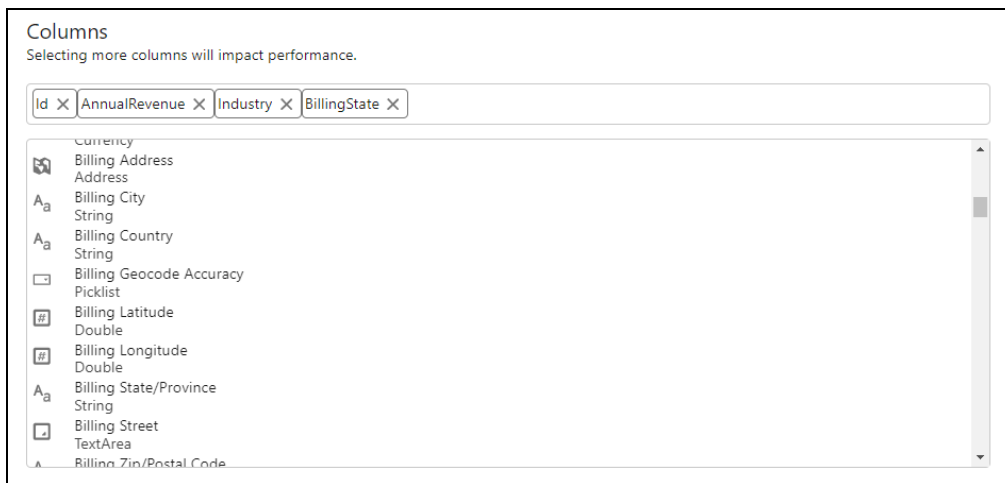
Build a Notes Report from Scratch

Notes Report for

Select a parent object

- Account
- Account Partner
- Account Soft Credit
- Address
- Address Verification Settings-DEPRE...
- Affiliation
- Affiliations Settings
- Allocations Settings
- Asset
- Asset Relationship
- Assigned Resource
- Batch

2. Next, select up to 7 columns (in addition to pre-set Name and Id) for the parent record to include in the results.



Columns

Selecting more columns will impact performance.

Id X AnnualRevenue X Industry X BillingState X

- Currency
- Billing Address
- Address
- Billing City
- String
- Billing Country
- String
- Billing Geocode Accuracy
- Picklist
- Billing Latitude
- Double
- Billing Longitude
- Double
- Billing State/Province
- String
- Billing Street
- TextArea
- Billing Zip/Postal Code



3. Narrow down the list of Parent Object records to consider by adding filters to the parent records.
You can toggle between "All" or "Any" conditions listed being met for logic type.

Filters

Narrow down the list of parent **Account** records to include Notes for

* Logic Type ⓘ

All Conditions Are Met ▼

	Field	Operation	Value	
1	AnnualRevenue X	greater than ▼	150,000	🗑️
2	BillingCountry X	equals ▼	USA	🗑️

+ Add condition

4. If you're looking to report on specific Notes that contain a keyword in the Title or Content of the note, you may add keywords for further filtering.

+ Add condition

Further filter the returned **Notes** by applying keyword filters

Title

Q Call X

Content ⓘ

Q

Keyword is searched against unformatted text in the note content. Including this filter will impact performance.

5. Limit the date range for the Notes to return using either relative or literal values.

Note Last Modified Date

LAST ▼

* Unit

WEEK

QUARTER

YEAR

N DAYS

6. Lastly, provide a limit to the number of results to return. Limit the volume to improve performance.

Limit ⓘ

50



7. After clicking Save & Run, give the report a name and Save.

New Report

*** Report Name**

Notes for Large Accounts in the USA - This Week

Save

8. After report is saved, the page will navigate to the report's results

Notes for Large Accounts in the USA - This Week (2 results) Edit						
Search Notes Q Apply						
Parent Name	Account.AnnualRevenue	Account.Industry	Account.BillingState	Note Title	Note Content	
1 Burlington Textiles Corp of America	350000000	Apparel	NC	Discovery Call Notes - Burlington Textiles	Current Challenges: - facing increasing cybersecurity threats. - Recent phishing attacks raised awareness of the need for a more robust solution. Current Solution: - Relies on basic antivirus software. - Acknowledges the need for a more robust solution. Budget and Timeline: - Budget range discussed: \$50,000 - \$75,000 - Urgency: Looking to implement a solution by Q3 2023. Competitor Landscape: - Explored current solutions but not fully satisfied. - Interested in understanding how our offering compares. Key Decision-Makers: - Mr. Smith is the primary decision-maker. - Will involve the IT team in the evaluation process. <u>Next Steps:</u> - Agreed to a follow-up call on Thursday, March 16th. - Will provide a detailed proposal outlining our recommendations. - Mr. Smith expects a demo during the next call.	
2 GenePoint	300000000	Biotechnology	CA	Initial Call Notes	- Company Name: XYZ Enterprises - Contact Name: Jane Doe - Title: CEO - Contact Email: jane.doe@xyzenterprises.com - Contact Phone: (555) 123-4567 - Website: www.xyzenterprises.com Business Overview: XYZ Enterprises is a well-established company in the biotechnology sector. They have been in operation for over 10 years and have a strong track record of innovation. Current Pain Points and Needs: - XYZ Enterprises is looking to streamline their product development process. - They have expressed interest in a custom software solution that can integrate with their existing systems. - Jane Doe mentioned their increasing need for data security and compliance. Previous Interactions: - Initial contact made on 09/05/2023 through a cold call. - Follow-up phone call on 09/08/2023, where Jane Doe provided more details about their needs. - Scheduled a product demonstration for 09/15/2023. Additional Notes: - Jane Doe appears to be the key decision-maker.	

9. Export the reports as they appear in a printable format, .xls worksheet or .csv file.



Sharing Filters

By default, the Object that the Filters are stored on have a **Private sharing model**, meaning that only the creator/owner (and their managers) will have access to the Filters.

To share a Report, click the Share button from within the button menu in the Reports browser tab or the Report's editor.

The screenshot shows the 'Enhanced Note Reports' interface. On the left is a sidebar with 'Reports', 'Report Builder', and 'Snapshots'. The main area has a search bar, 'Report Type' (Custom, Standard), and a 'Mine Only' toggle. Below is a table of reports:

Name	Type	Parent Object/Re...	Created By	Last Modified Date	
Notes for Large Accounts in the USA - This Week	Custom Report	Account	Aleksandar Basic	2024-10-02	Share, Delete
Opportunities with Products Report	Standard Report	Opportunities with Products	Aleksandar Basic	2024-10-02	
My Team's Notes	Custom Report	User	Aleksandar Basic	2024-10-02	
YTD - Notes for All Accounts	Standard Report	Users	Aleksandar Basic	2024-10-02	
Customer Complaint Notes	Standard Report	Accounts	John Smith	2024-10-02	

Below the table is the 'Notes for Large Accounts in the USA - This Week' editor. It includes a 'Notes Report for' dropdown (Account), a 'Columns' section with a warning 'Selecting more columns will impact performance.', and a column selection bar (Id, AnnualRevenue, Industry, BillingState). A 'Share' button menu is open, showing options: 'Share', 'Delete', 'Create Snapshot', and 'Save & Run'.

In the pop-up window, manage which users, groups, or roles have what level of access to your report. Once shared, the report will appear for them in the Report browser menu

The screenshot shows the 'Sharing Detail' window for the report 'Notes for Large Accounts in the USA - This Week'. It includes a 'View' dropdown (All), 'Edit', and 'Create New View' buttons. Below is a table of users and groups with sharing access:

Action	Type	Name	Access Level	Reason
	User	Aleksandar Basic	Full Access	Owner
Edit Del	User	John Smith	Read/Write	Manual Sharing

Below the table is an 'Explanation of Access Levels' section:

- Full Access - User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
- Read/Write - User can view and edit the record, and add associated records, notes, and attachments to it.
- Read Only - User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
- Private - User cannot access the record in any way.

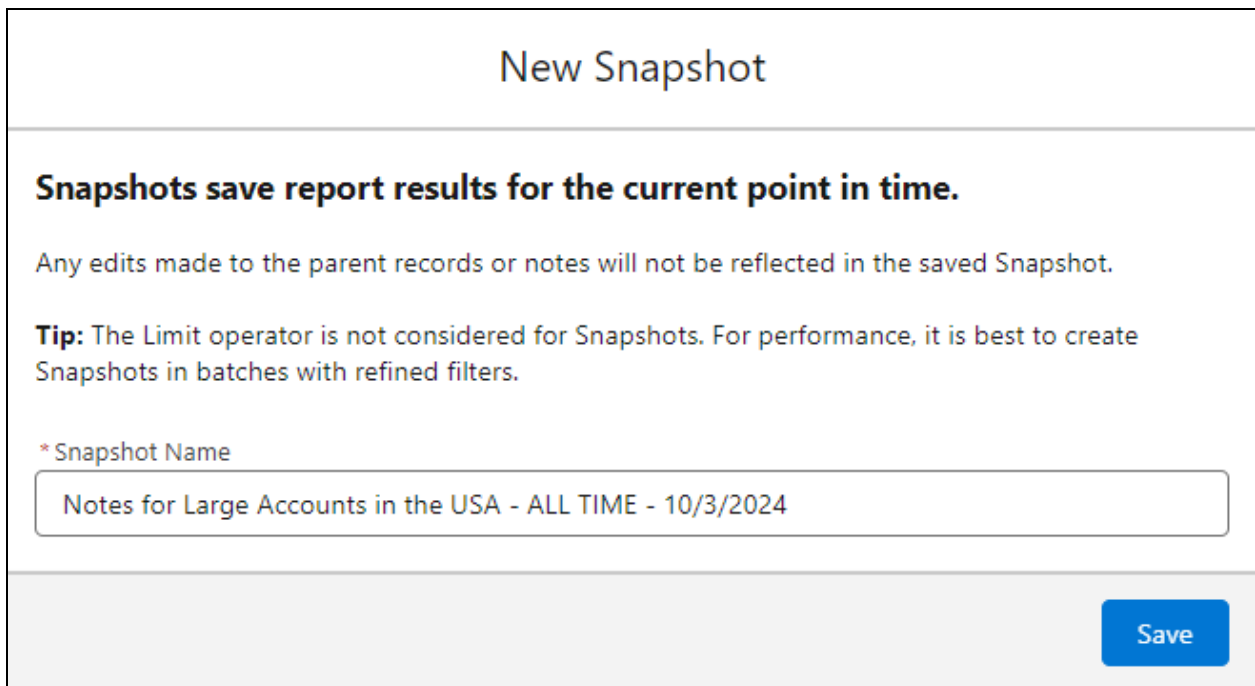
Snapshots

When you want to report on a large number of Notes (>500), or you wish to save a Note report in a point-in-time, create a Snapshot which runs asynchronously and saves the report results to the database.

To create a Snapshot for a given **Custom Report**, navigate to its editor and click the Create Snapshot button within the button menu.



Give the Snapshot a unique name and Save.



This will initiate batched asynchronous jobs in the background to query, process, and save the Note report results as configured in the report builder.

Snapshot In Progress



The Snapshot is being generated in the background. **You may leave this page.**
Once complete, the results will be available in the Snapshots menu from the App homepage.

This may take a few minutes depending on the size of the results.
You can monitor the job(s) in [Apex Jobs](#).

[App Home](#)



NOTE: Snapshots do not consider Limits set in the report builder, and will retrieve & save all the Notes that fit the filter criteria. Be careful when constructing the filters to ensure you do not run a report on a massive amount of Notes.

Once the jobs are complete (which may take a few minutes), the results can be found in the “Snapshots” menu of the app homepage.

Reports

Report Builder

Snapshots


Snapshots

Snapshots capture Note and Parent data at point-in-time. Save the filters and re-run the report for up to date results. Results may take some time to complete as they are created in batches. Monitor the statuses of running Apex Jobs and refresh the list below periodically.

Snapshot Name
↻

My First Report - 10/2/2024 ▼

Notes for Large Accounts in the USA - ALL TIME - 10/3/2024
▼



The results are saved to the database under the enotesreport__Note_Report_Result_c object, and will not update if parent or note records change.

Notes for Large Accounts in the USA - ALL TIME - 10/3/2024 (13)

Search Notes

Q

Apply

Parent Name	Parent.AnnualRevenue	Parent.Industry	Parent.BillingState	Note Title	Note Content	Last Modified																		
1United Oil & Gas Corp.	5600000000	Energy	NY	Onboarding Tasks	<table><thead><tr><th>Task</th><th>Date</th><th>Status</th></tr></thead><tbody><tr><td>Kickoff Meeting</td><td>March 1, 2024</td><td>In Progress</td></tr><tr><td>Needs Assessment</td><td>March 5, 2024</td><td>Pending</td></tr><tr><td>User Training</td><td>March 10, 2024</td><td>Upcoming</td></tr><tr><td>Go-Live Preparation</td><td>March 15, 2024</td><td>Planned</td></tr><tr><td>Ongoing Support and Maintenance</td><td>March 20, 2024</td><td>Future</td></tr></tbody></table>	Task	Date	Status	Kickoff Meeting	March 1, 2024	In Progress	Needs Assessment	March 5, 2024	Pending	User Training	March 10, 2024	Upcoming	Go-Live Preparation	March 15, 2024	Planned	Ongoing Support and Maintenance	March 20, 2024	Future	Oct 2, 2024
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8United Oil & Gas, Singapore		Energy	Singapore	Onboarding Tasks	<table><thead><tr><th>Task</th><th>Date</th><th>Status</th></tr></thead><tbody><tr><td>Kickoff Meeting</td><td>March 1, 2024</td><td>In Progress</td></tr><tr><td>Needs Assessment</td><td>March 5, 2024</td><td>Pending</td></tr><tr><td>User Training</td><td>March 10, 2024</td><td>Upcoming</td></tr><tr><td>Go-Live Preparation</td><td>March 15, 2024</td><td>Planned</td></tr><tr><td>Ongoing Support and Maintenance</td><td>March 20, 2024</td><td>Future</td></tr></tbody></table>	Task	Date	Status	Kickoff Meeting	March 1, 2024	In Progress	Needs Assessment	March 5, 2024	Pending	User Training	March 10, 2024	Upcoming	Go-Live Preparation	March 15, 2024	Planned	Ongoing Support and Maintenance	March 20, 2024	Future	Oct 2, 2024
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15United Oil & Gas Corp.	5600000000	Energy	NY	Note created by Aleksandar Basic user	Created by Aleksandar Basic user	Sep 15, 2024																		
16GenePoint	300000000	Biotechnology	CA	Conversation Notes Guide	Conversation Notes Conversations are at the heart of selling, so your notes should document both the essence and the details of each interaction. And since your notes are collaborative and centralized, managers and extended team members can offer helpful feedback and suggestions. Here's what you should aim to capture about each meeting or call. Time, Date, and Type of Meeting Was it a phone call, in-person meeting, or some other kind of interaction? Including time and date with each note entry helps keep track of the deal's pace and progress. Meeting Topics What key things did you learn about the client's needs and decision process? Did you gain any competitive intelligence? Focus on items that are important, insightful, or actionable. If it doesn't fit one of those three categories, it might not belong in your notes. Action Items What's next? Capture any follow-up initiatives you committed to as well as any follow-up on the customer side. Did the client ask for a proposal, presentation, or further information? When should you call again? Use this section to help remind you of tasks. Current Challenges: • <i>Facilitate interaction with customer's team</i>	Sep 15, 2024																		

Exporting Report Results

The Export feature is available for both real-time and Snapshot reports.

Export

Select a file type for export

PDF

XLS

CSV

An excel worksheet of the report.

Include Id Columns

☐

Strip HTML Tags

☒

Export

Clicking Export will prompt for a file type and preferences for the file of the data.

PDF

A printable view displayed in a new tab. Use Ctrl/Cmd + P to print the page or save locally as a PDF document with preferred page setup and margins.

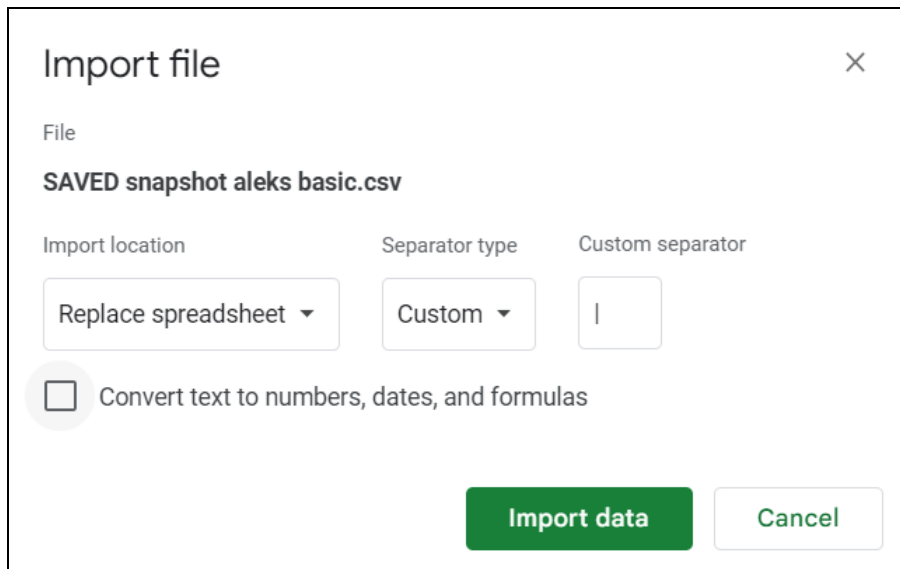
XLS

A worksheet with the columns and

CSV

The csv exports uses the **pipe** ("|") character as a delimiter since it is common for the content of notes and other fields to contain a comma.

You can use GSheets to import the csv file and define a custom separator to view the results properly.



The screenshot shows the 'Import file' dialog box in Google Sheets. At the top, it says 'Import file' with a close button (X). Below that, it says 'File' and 'SAVED snapshot aleks basic.csv'. There are three sections: 'Import location' with a dropdown menu set to 'Replace spreadsheet', 'Separator type' with a dropdown menu set to 'Custom', and 'Custom separator' with a text input field containing '|'. Below these, there is a checkbox labeled 'Convert text to numbers, dates, and formulas' which is currently unchecked. At the bottom, there are two buttons: 'Import data' (green) and 'Cancel' (light green).

The **XLS** and **CSV** file types include the option of additional columns like ContentVersionId (Note Id) and LinkedEntityId (Parent Id) from the Note.

By default, the html tags within the content of the Notes to denote any rich-text formatting or images contained in its value. If you choose to include them, you may use a free rich text converted tool like [HTMLEd.it](https://htmled.it/) to copy paste the html-formatted value and convert it back to rich-text.



Emailing Reports

(Requires Exporting Report Results permission set)

Both Custom and Standard runtime reports support an Email Schedule that emails the first 50 results of the report to a list of recipients on a Daily or Weekly frequency. Use the Email Scheduler to set the recipients, frequency, start time, and sender details.

Schedule Report Email

*** Recipient Emails**

Start Time

*** Date**

*** Time**

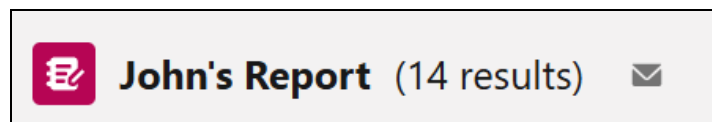
Frequency

Daily
Weekly

Sender

End Schedule
Schedule Job

Reports with email schedules will be denoted by the email icon on the title.



Modifying and saving an email schedule configuration for a report already containing one will overwrite the existing schedule with the new one. All scheduled email jobs can be found within **Setup > Scheduled Jobs** with a name starting with **"NotesEmailScheduler_"**

Setup
Home
Object Manager

Environments

Jobs

Scheduled Jobs

Didn't find what you're looking for? Try using Global Search.

SETUP

Scheduled Jobs

Enhanced Notes Report Emails

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

Percentage of Scheduled Jobs Used: 1%

You have currently used 1 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Lightning Platform Apex Limits](#) topic.

View: Enhanced Notes Report Emails [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
Manage Del Pause Job	NotesEmailScheduler_Weekly Report_1739887885131	Basic, Aleks	2025-02-18, 9:11 a.m.		2025-02-19, 9:11 a.m.	Scheduled Apex	08eHo000021wB7n



Record Notes Related List

An improvement to the standard related list of Notes on a record page, the custom LWC Action that can be added to any object allows users to access the full contents of all Notes relating to a given record in a full format for easy viewing, searching, and exporting.

To add the button, first create an Action on the object of your choice, selecting the **enotesreport:viewNotesBtn** LWC, and labeling it 'View Notes'.

Account Actions
New Action

Enter Action Information Save Cancel

Object Name i

Action Type i

Lightning Web Component i

Subtype i

Standard Label Type i

Label i

Name i

Description i

Icon [Change Icon](#)

Save Cancel

Add the button to the object's page layout/lightning page to access it from the record. The button opens a new page containing the source record's Notes in a report table.

For objects that do not support Quick Actions, you can add a Custom Detail Page Button with the link:

`/lightning/n/enotesreport__Dynamic_Note_Report?c__parentId={!Task.Id}`

United Oil & Gas, Singapore Notes

Notes

United Oil & Gas, Singapore Notes (3)

▼

Search Notes

Q

Apply

Note Title	Note Content	Last Modified Date	Created By																		
1United - Field Sales Visit #2	Summary: Met with the procurement team at XYZ Corporation to discuss their upcoming project. Successfully presented our product range and tailored solutions. Secured a verbal agreement for a quote proposal. Next Steps: 1. Formal Proposal: Draft a formal proposal incorporating discussed terms and pricing, ensuring clarity and alignment with the verbal agreement. 2. Follow-up Meeting: Schedule a follow-up meeting for March 5th to review the formal proposal, address any remaining questions, and finalize the agreement. 3. Contract Documentation: Prepare necessary contract documentation for review and signature. 4. Coordinate Internal Teams: Communicate internally with logistics and production teams to ensure alignment with the proposed project timelines.	Apr 12, 2024, 03:34:45 p.m.	Aleksandar Basic																		
2Onboarding Tasks	<table><tr><th>Task</th><th>Date</th><th>Status</th></tr><tr><td>Kickoff Meeting</td><td>March 1, 2024</td><td>In Progress</td></tr><tr><td>Needs Assessment</td><td>March 5, 2024</td><td>Pending</td></tr><tr><td>User Training</td><td>March 10, 2024</td><td>Upcoming</td></tr><tr><td>Go-Live Preparation</td><td>March 15, 2024</td><td>Planned</td></tr><tr><td>Ongoing Support and Maintenance</td><td>March 20, 2024</td><td>Future</td></tr></table>	Task	Date	Status	Kickoff Meeting	March 1, 2024	In Progress	Needs Assessment	March 5, 2024	Pending	User Training	March 10, 2024	Upcoming	Go-Live Preparation	March 15, 2024	Planned	Ongoing Support and Maintenance	March 20, 2024	Future	Oct 2, 2024, 11:39:54 p.m.	Aleksandar Basic
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Considerations

- Results of the reports return only the most recent version of the Note.
- 6 visible parent columns are supported for Standard Reports, and 5 for Custom Reports. The column results are formatted in text/string, and support 255 characters length with the exception of the third column in the Standard Report (first column for Custom Reports) which supports 131,072 characters.
- Performance is impacted with greater volume, columns, more complex filter criteria, and note content size. Apex CPU Timeouts may occur, in which case it is best to use the [Snapshot feature](#).
- Snapshots are a point-in-time view of a report's result. They do not change, and the Note or parent record data might be outdated shortly after creation. To refresh a Snapshot, re-create a snapshot for a saved Report.
- Snapshots are created asynchronously in batches of 250 at a time. Monitor Apex Jobs in your org to check the status of the Snapshot report. Some batches may fail with errors which result in a partial report.
- Snapshots create a new record with Note and parent record data in the `enotesreport__Note_Report_Result__c` object for each report result that meets the criteria. Be mindful of storage implications this may have, and purge old Snapshots regularly.
- By default, Filter and Snapshot object sharing models are set to Private. If you wish to share and make the records more accessible, modify the Org-wide-default sharing model, or create a sharing rule.
- Reporting on Notes for the User object will return Notes created by and accessible to the users that meet the criteria.
- Salesforce does not support custom reports or components to be placed on standard Dashboards. You may provide a hyperlink on a dashboard to a specific report by leveraging the rich text component.

Support

For questions, feedback, or feature requests, contact aleks@junctionsolutions.ca

Paid customers will be given priority.

