

Junction Solutions presents



Enhanced **Notes** Report

User Guide

Package Version 2.0
March 2024

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) Refresh Back				
Search Notes		Notes per page		
<input type="text" value=""/>		<input type="text" value="10"/> 1		
	Parent Name	Title	Content	Last Modifie...
1	Untold Hotels Generator Installations	Complaints about Customer support	<p>Issues with interactions with our customer support team:</p> <ol style="list-style-type: none"> 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. Communication: He highlighted instances where he felt that the support team's communication lacked clarity and left him confused about the resolution process. 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.
			<ul style="list-style-type: none"> 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 <p>Business Overview: XYZ Enterprises is a well-established company in the IT services industry, specializing in</p>	

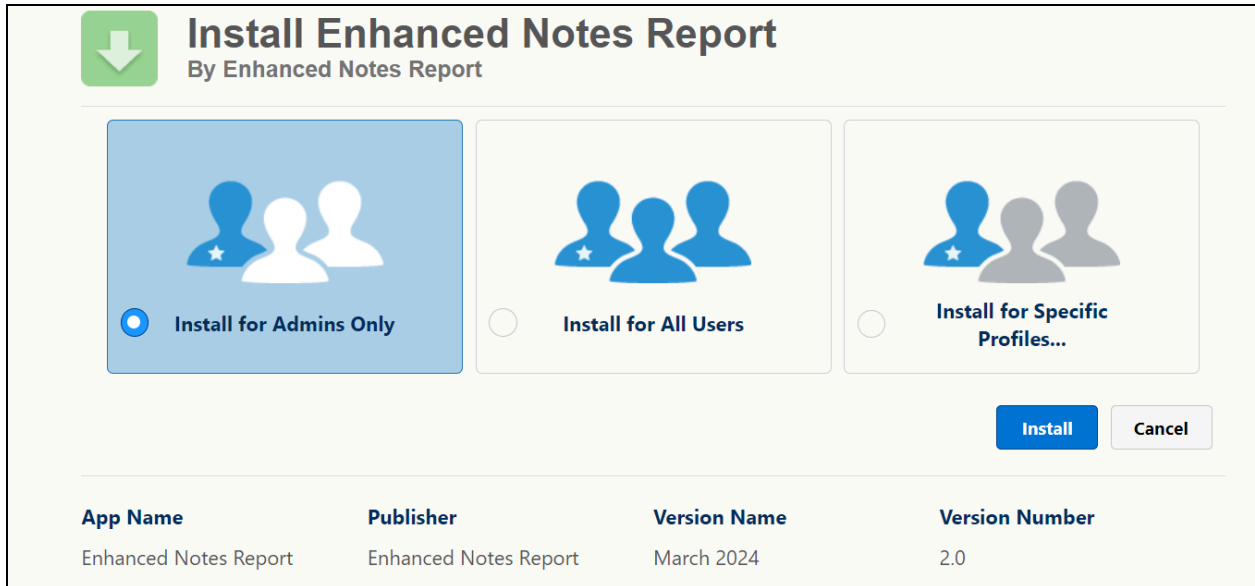
Enhanced reporting of Notes allows for deeper insights into the interactions your reps are having with customers and internal teams, unlocking the full potential of Lightning Notes.



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



User Permissions & Setup

Required 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	<ul style="list-style-type: none"> • Building real-time reports • Viewing report Snapshots • Viewing and using saved Filters
Create Enhanced Notes Reports	<ul style="list-style-type: none"> • Saving Report Snapshots • Creating, updating, deleting Filters
Delete Enhanced Notes Reports	<ul style="list-style-type: none"> • Deleting Snapshots
Exporting Report Results	<ul style="list-style-type: none"> • Exporting real-time & Snapshot report results into .csv files

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 \$200 per company is required to use this app, and 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.



Product Features

View
Rich-Text
Content of
Notes

Report on
Notes for
**Standard &
Custom
Objects**

Save & Share
Custom
Filters

Filter on
**Parent Record
Criteria**

Add
Additional
**Parent
Record
Columns** to
Report

Greater
Visibility
into your Org's
Notes

Save
Report
Result
Snapshots

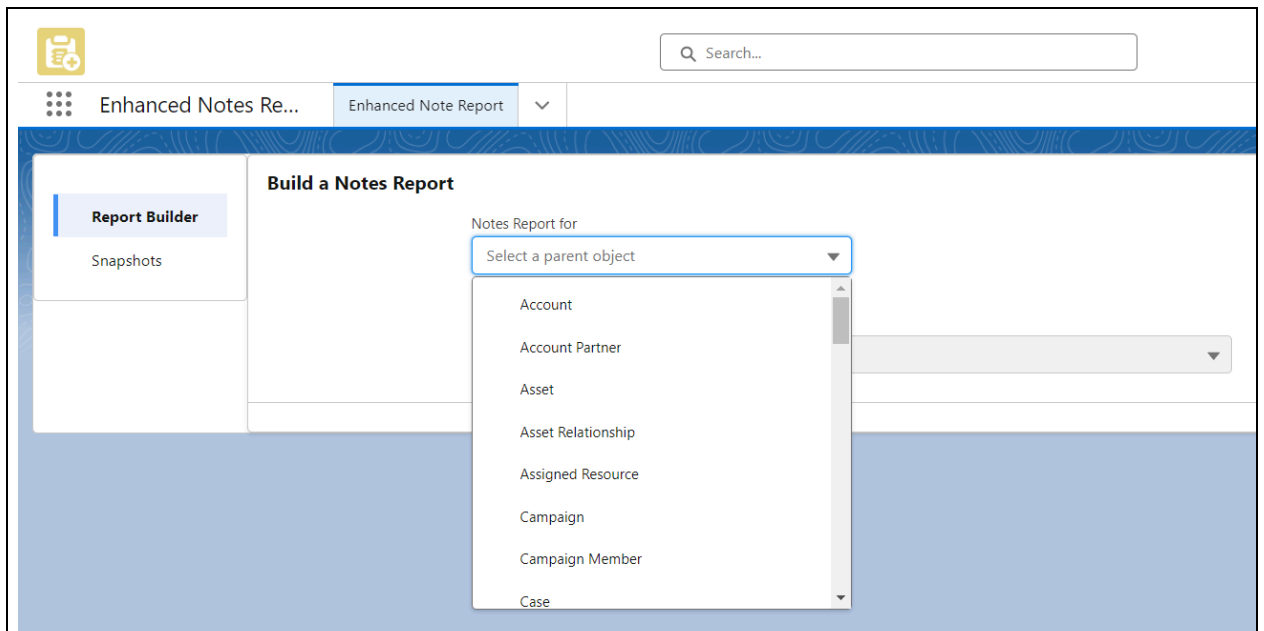
Export
Results into
csv Format

Filter on
Note
Content &
Title
Keywords

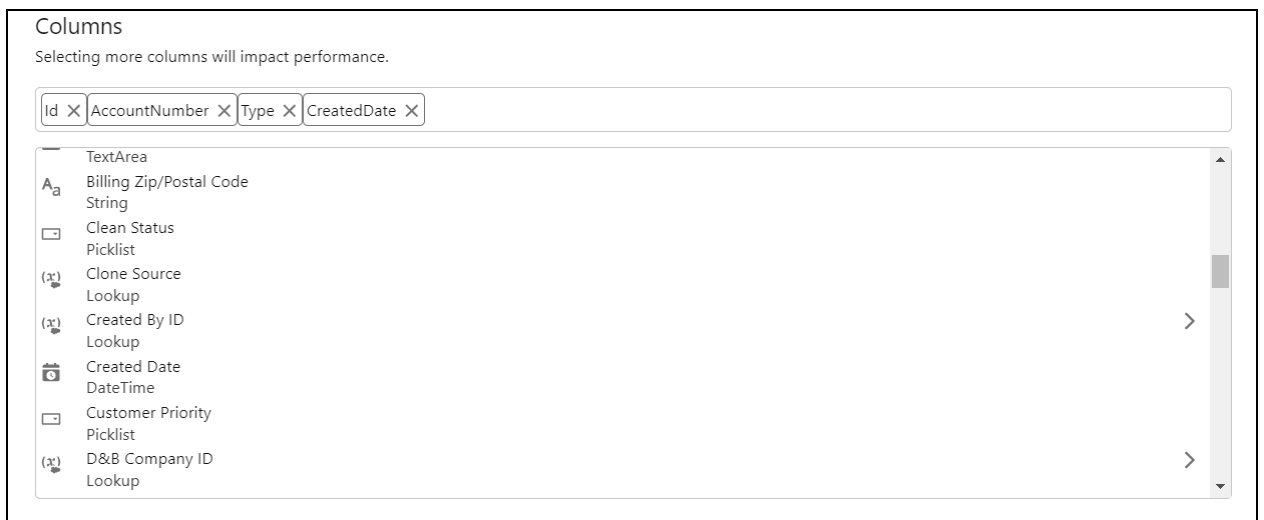


Building a Notes Report

1. Navigate to the “Enhanced Notes Report” lightning app.
2. Within the **Report Builder** menu item, select the Parent Object for which you wish to build a Notes Report for. All Standard and Custom objects will appear in the list – including those that do not support Notes.



3. Within the Columns section, select **up to 5 additional columns** for the selected Parent Object to expose on the report for parent record relating to the Notes.



4. 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

5. 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.

6. Lastly, provide a limit to the number of results to return.

Limit ⓘ

50

Larger results may result in Apex CPU Timeout errors.

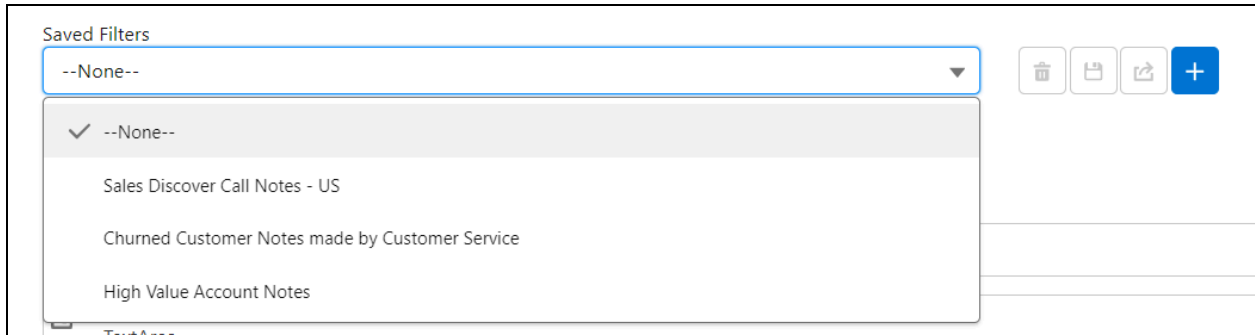
There is a limit of 500 results for synchronous reports.

Set a limit to increase performance, and run multiple smaller-sized reports or save a Snapshot to run the report asynchronously instead.

Saved Filters

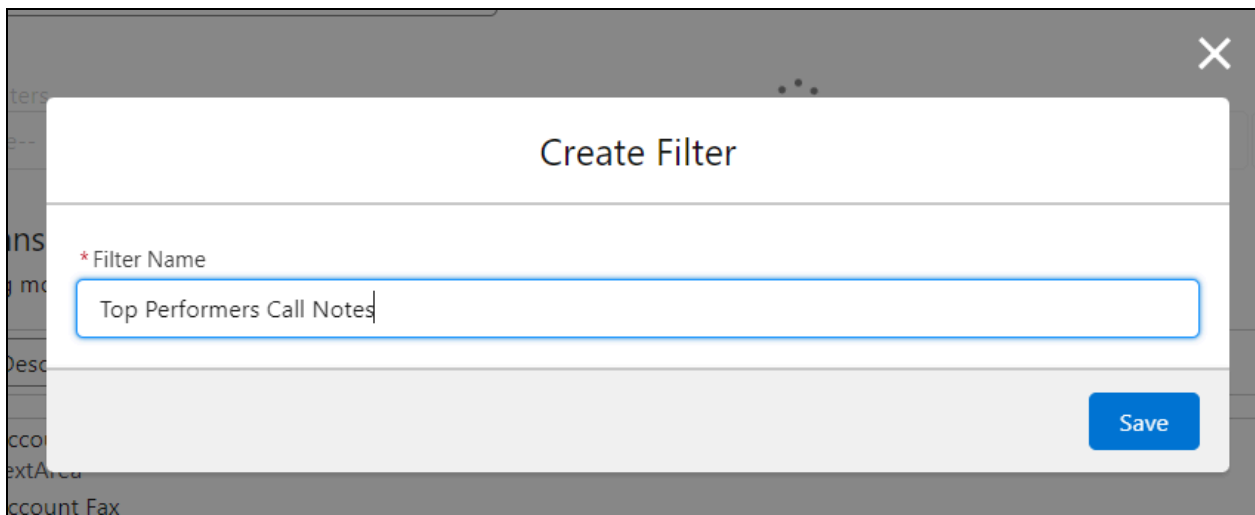
Use Saved Filters in the Report Builder to run the same report at a later time with more up-to-date results.

Once a Parent Object is selected, the available Saved Filters for that object will appear for selection below. Selecting one will populate the Columns, Filters, Keywords, and Limit that was configured and saved for the selected filter name.



Saving Filters

To save a Filter, build out the Columns, Filters, Keywords, and Limit in the Report Builder, and then click the blue plus button.



After providing a Name for the Filter and saving, the Filter will be available in the dropdown in the Report Builder.

Updating Filters

When a Filter is selected, any changes made to the configuration below are not saved to the filter until the save button is clicked. Clicking the save button will override the Filter configuration to the current Report Builder configuration.

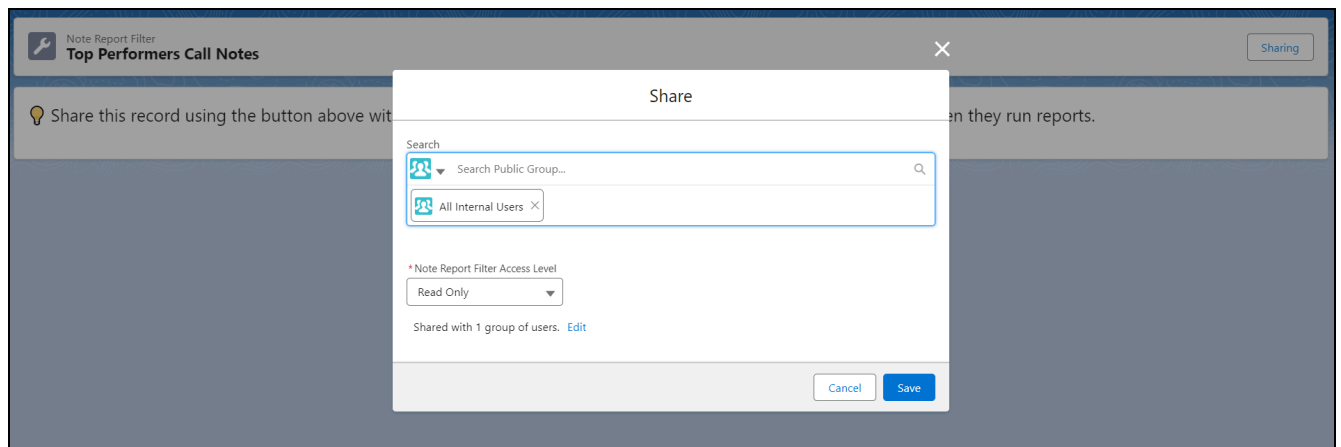


Deleting Filters

Clicking the trash icon will delete the selected Filter. It is possible to undo the deletion by going to your Recycling Bin and restoring the deleted record.

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 in the role hierarchy) will have access to the Filters.



To share a Filter with others, click the share icon and use the standard Sharing action on the record page to select which user(s), group(s), or role(s) to share the filter with and how.



View Results

Once you've set up the report builder with the desired conditions, running the report will return the most recent Note version records for the parent records that fit the Parent Object and keyword filters with the selected columns in addition to the standard ones (Parent Name, Note Title, Note Content, Note Last Modified Date).

Parent Name	Account.AccountNumber	Account.Type	Account.CreatedDate	Note Title	Note Content
Burlington Textiles INC.	YN805-1	Customer - Channel	2023-08-09 13:29:51	Discovery Call Notes - Burlington Textiles	<ul style="list-style-type: none">Current Challenges:<ul style="list-style-type: none">facing increasing cybersecurity threats.Recent phishing attacks raised awareness of vulnerability.Current Solution:<ul style="list-style-type: none">Relies on basic antivirus software.Acknowledges the need for a more robust cybersecurity infrastructure.Budget and Timeline:<ul style="list-style-type: none">Budget range discussed: \$50,000 - \$75,000.Urgency: Looking to implement a solution within the next 3-6 months.Competitor Landscape:<ul style="list-style-type: none">Explored current solutions but not fully satisfied.Interested in understanding how our offering differs.Key Decision-Makers:<ul style="list-style-type: none">Mr. Smith is the primary decision-maker.Will involve the IT team in the evaluation process. <p><u>Next Steps:</u></p> <ul style="list-style-type: none">Agreed to a follow-up call on Thursday, March 1, 2024, at 2:00 PM.Will provide a detailed proposal outlining our cybersecurity solution.Mr. Smith expects a demo during the next call to better understand the product. <p>Digital Solutions Tailored to Your Needs</p> <p>Multicultural web development agency and one-stop digital solution for businesses of all sizes.</p> <p>Website Data Analytics</p> <p>Building customized data visualization for making informed decisions and measuring the ROI of your custom</p> <p>Explore More</p> <p>Search Engine Optimization</p>

From the report screen, you are able to further filter the results by keyword within any of the columns in the report.

Search Notes ⓘ

You can also adjust the Notes that render per page, and select the page of the report.


Notes per page

10 ▾ 1 2 3 4 5


- ✓ 10
- 20
- 50
- 100

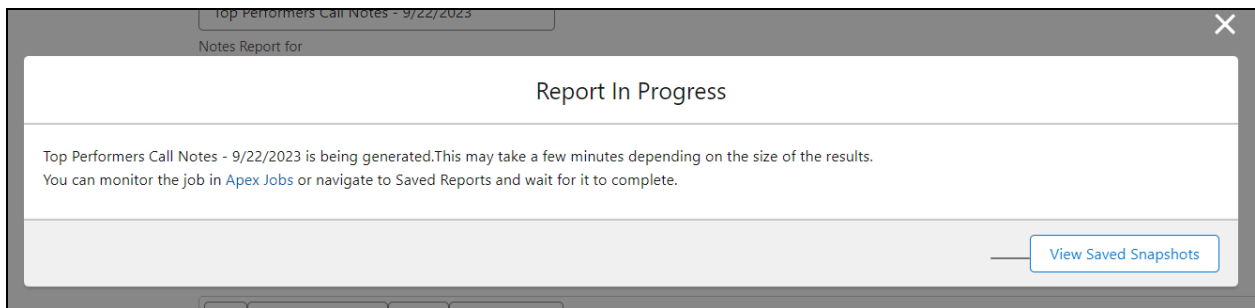
Snapshots

When you want to report on a large number of Notes (>500), or you wish to save the point-in-time data of Notes and related parent records, enable the Save Snapshot toggle and provide a name prior to running the report.



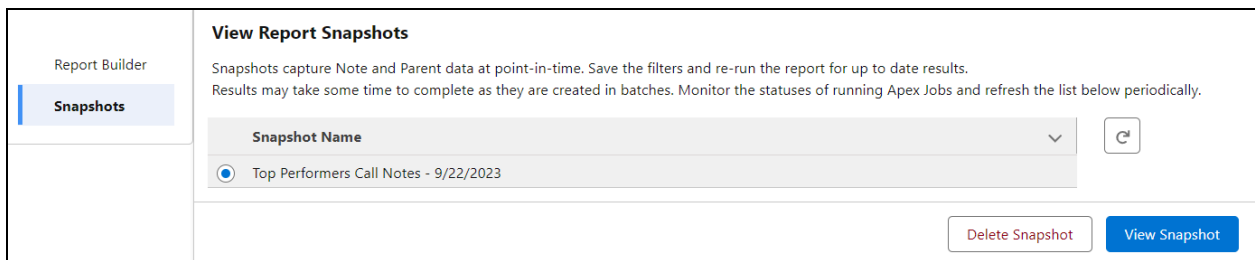
This feature will initiate batched asynchronous jobs in the background to query, process, and save the Note report results as configured in the report builder.

 **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.



After up to a few minutes later, the results of the Snapshot can be found within the Snapshots menu item.

Select a Snapshot to view or delete it.

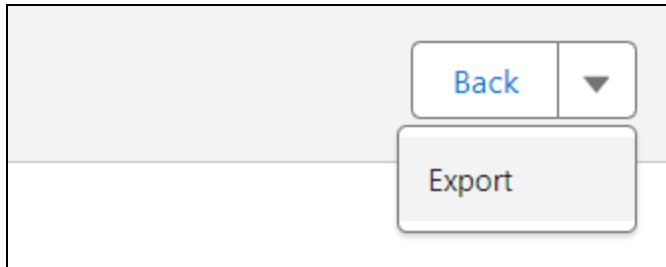


The results are saved to the database under the enotesreport__Note_Report_Result__c object, so consider deleting Snapshots regularly for storage.



Exporting Report Results

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

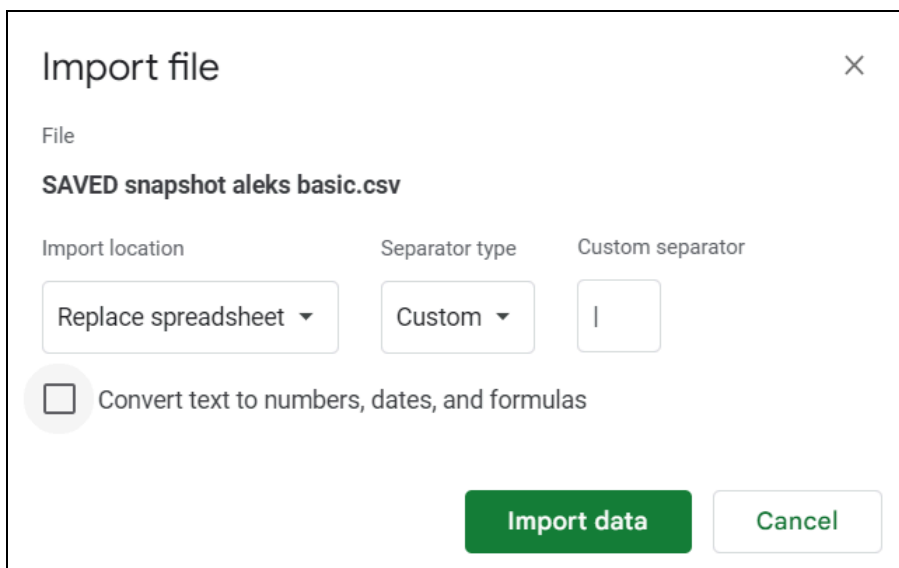


Clicking the Export button will download a .csv file containing all the columns and rows that are returned in the results table, including some additional ones like ContentVersionId, CreatedbyId, LinkedEntityId from the Note.

The content of the Notes will be tagged with html tags to denote any rich-text formatting or images contained in its value. 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.

The csv file 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.



Considerations

- Results of the reports return only the most recent version of the Note.
- A limit of 5 additional columns to the report are supported at this time. The column results are formatted in text/string, and support 255 characters length with the exception of the first selected column which supports 131,072 characters.
- Runtime reports support up to 500 results at a time. Performance is impacted with more 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, [create and save a Filter](#) to reuse.
- 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 results 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.
- Related record fields via Lookup relationships are not supported in the column or filter selectors. A workaround is to create a formula field and use that instead.
- Formulas, field references, and relative date values are not supported in the filter criteria. Literal values only.
- 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.

Support

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

Paid customers will be given priority.

