

Astrea Notes Converter

User Manual



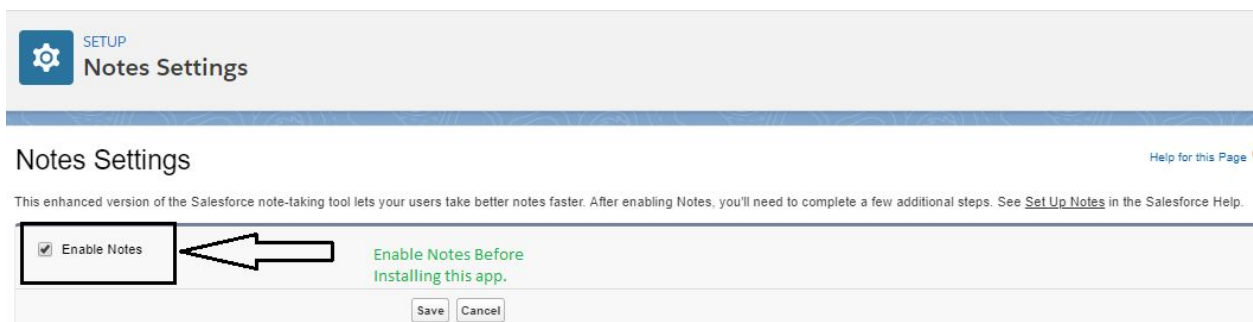
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OVERVIEW:

Astrea Notes Converter is an app which converts the salesforce old Notes into new Enhanced Notes. This app is useful because in winter '18 users would not be able to upload an notes in the 'Notes and Attachment' related list. This app provides the functionality for converting notes into Enhanced Notes for both standard objects (where notes and attachments are supported) as well as for custom objects. It also provides user to delete their old notes after conversion. This app supports the standard objects such as Account, Contact, Opportunity, Case, Solution, Product2, Lead, Campaign, Asset, Contract, Event and Task and custom objects if any.

Prerequisite Setting:

Enable Notes Setting for this **Go to Setup > Type Note Setting >Click on Note Setting** and then **enable notes** save it and you are ready to go.



Steps to be followed and Sample Screenshot

Notes Converter Home : This tab will give you complete overview of this app and also let you find that how to use this app.

Astrea Note Converter

HOW TO CONVERT CLASSIC NOTES INTO ENHANCED NOTES

Astrea Notes Converter provides functionality to convert old notes to enhanced notes and then to delete old notes. Before deleting old notes please ensure that enhanced notes have been migrated successfully.

Steps

- Convert Old Notes page will show count of classic notes for all the standard and custom object (where notes and attachment) are supported.
- You can check the boxes for the objects for which you want to convert the notes records. Please take care while checking the checkboxes of maximum number of notes limit. Limits for converting total number of notes every 24 hours is provided below.
- After conversion, you will need to refresh the page to check number of notes that are converted. It may take upto few minutes to perform the conversions. Once conversion is completed, the page will be updated accordingly and you will need to check the newly created records.

Note* - The limit of how many enhanced notes that will be created in 24 hour period varies from 2,500 - 36000 based on your license type.

HOW TO CHECK IF ENHANCED NOTES ARE CONVERTED

Check [Check Converted Notes Log](#) tab to check for which sObject records the notes had been converted.

Convert Old Notes :

The functionality of this tab includes the conversion of selected objects into the Enhanced Notes. This tab displays the checkboxes besides the object name to select the object for which the user wants the conversion and it also displays the total number of Notes owned by the login user for the selected objects which have not been converted into Enhanced Notes.

Note: System Administrator user can convert all the notes so in page it will display notes count owned by all users.

Steps 1:

Select the checkbox for the object and click on the convert button. Recommended if you choose one object at a time for tracing.

Enable Conversion of Notes for Specific Objects.

Enable the checkbox besides the object name to convert all the notes into enhanced notes. Admins can convert all the notes but other profile users can convert only the notes owned by them. Please take care of limit while selecting checkboxes. The limit of how many enhance note will be created in 24 hour period varies from 2,500 - 36000 based on your license type.

SELECT	SELECT OBJECT	TOTAL NOTE TO CONVERT
☐	Contract	0
☐	Account	0
☐	Contact	0
☐	Lead	200
☐	Opportunity	200
☐	Asset	0
☐	Solution	0
☐	Task	0
☐	Event	0
☐	Convert Note Error Log	0
☐	New Note Logger	0

Convert To Enhanced Notes

Steps 2:

After clicking on the convert button notes will be converted into the enhanced note. Stats on 'Total Notes To Convert' column will get updated accordingly. It will only show the count of notes for which note conversion is not done.

Enable Conversion of Notes for Specific Objects.

Enable the checkbox besides the object name to convert all the notes into enhanced notes. Admins can convert all the notes but other profile users can convert only the notes owned by them. Please take care of limit while selecting checkboxes. The limit of how many enhance note will be created in 24 hour period varies from 2,500 - 36000 based on your license type.

SELECT	SELECT OBJECT	TOTAL NOTE TO CONVERT
☐	Contract	0
☐	Account	0
☐	Contact	0
☐	Lead	200
☒	Opportunity	200
☐	Asset	0
☐	Solution	0
☐	Task	0
☐	Event	0
☐	Convert Note Error Log	0
☐	New Note Logger	0

Convert To Enhanced Notes

Note: For more than 2500 notes, only 2500 notes will be converted. This is because there is a limit of how many notes can be created in 24 hour period which is only 2500 in developer edition. User can check the **Convert Notes Error Log** tab to ensure successful conversion and **Delete Old Notes** tab to check if notes are converted.

Delete Old Note:

The functionality of this tab includes the enabling the checkboxes besides the object name to delete the notes which have been converted into the enhanced notes. This tab displays the checkboxes besides the object name to select the object for which the user wants the deletion and it also displays the total no of notes for the particular objects which have been converted into the enhanced notes.

Steps 1:

Select the checkbox for the object and click on the Submit button.

Delete Converted Old Notes.

Always check the older notes if converted into enhanced note and then perform deletion operation. Enable the checkbox besides the object name to delete all the converted old notes. Admins can delete all the notes but other profile users can delete only the notes owned by them.

SELECT	SELECT OBJECT	TOTAL NOTE TO DELETE
☐	Contract	0
☐	Campaign	0
☐	Account	0
☐	Contact	204
☐	Lead	0
☐	Opportunity	0
☐	Asset	0
☐	Case	0
☐	Solution	0
☐	Task	0
☐	Event	0
☐	Convert Note Error Log	0
☐	New Note Logger	0

Delete Converted Notes

Step 2: After clicking on button the converted notes will be get Deleted So the 'Total Note to Delete' column will be updated.

Convert Note Error Logs:

This tab generates the error logs while conversion or deletion of notes. Any standard error while processing will show in this tab.

LIMITATIONS:

- The limit of how many versions can be published in 24 hours is 2500 in developer edition. This can go maximum upto 36000 in other editions. Exceeding the limit will cause the error 'ContentPublication Limit exceeded' which can be checked in Apex jobs.

- Only System Admin users can convert all the notes else other user can only convert notes which they own.