Installation and Administration Guide

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Any questions? Contact support.
Evernote is the ultimate companion for Salesforce. Evernote for Salesforce links research, documents, proposals, and business cards with Salesforce records, giving your sales team a more complete view of customers and leads.

**Basic Setup**

**STEP 1. Get Evernote or Evernote Business**

Evernote for Salesforce can be used with Evernote Business or personal Evernote accounts. With Evernote Business, any note linked to a Salesforce record is visible to all users with access to that record. With personal Evernote accounts, notes linked to a record are only visible to the account owner.

To collaborate and share notes across the entire team, get Evernote Business and invite everyone on your team. More about deploying Evernote Business to your team >>

**STEP 2. Install the Evernote for Salesforce Managed Package**

Open the Salesforce AppExchange in your web browser: https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4JlpEAf

<table>
<thead>
<tr>
<th>Find Evernote and click Get It Now</th>
</tr>
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<tbody>
<tr>
<td><img src="image" alt="Evernote for Salesforce" /></td>
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<table>
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<tr>
<th>Click ‘Log in to the AppExchange’</th>
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<tr>
<td><img src="image" alt="Log in to the AppExchange" /></td>
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</table>
Click **Install in production**

**Evernote for Salesforce**

*Discover, share, and capture information related to every record*

**Free** - Details below

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**How would you like to continue?**

- ![Install in production](image)
- ![Install in sandbox](image)

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Select **‘Install for All Users’**

Click **Install**

*Note: If you receive an error at this step, check the box and click Install again*

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Click **Done** when you see ‘Installation Complete!’ appear

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**STEP 3. Add Evernote to your Salesforce page layouts**

Now that Evernote is connected to Salesforce, adjust your page layouts to show notes alongside your opportunities, leads, accounts, and contacts.
Log in to Salesforce then select 'Setup'.

Note: The ‘Setup’ link either appears on the main page or inside the pull-down menu when you click your account name.

Select **Page Layout:**

In *Salesforce Classic*, select **Build > Customize > Contacts > Page Layout** from the side navigation panel.

In *Lightning Experience*, select **Setup > Object Manager** from the side navigation panel, select **Contact**, then click **Page Layouts**.
Select 'Edit' in 'Contact Page Layout (s)' view

Lightning Experience

Select 'Visualforce Pages', then drag and drop 'Section' below the 'Custom Links' section

Name the section "Evernote"

Select 'Detail Page'

Deselect 'Edit Page'

Select '1-column layout' (required)

Click OK
At the top of the page, drag and drop ‘EvernoteContactPage’ into the ‘Evernote’ section.

Click the small wrench (properties) button at the top-right of the new ‘Evernote’ section you just added.

Adjust the height of the module so notes and the interface appear properly.

Note: Make sure to click on the Evernote field Properties button, not the Section Properties button.

Change the ‘Visualforce Page Properties’ to the recommended sizes:

- Width = 100%
- Height = 488 pixels (320 minimum)
Click **Save** to save your layout

Check your integration:

In **Salesforce Classic**,
- Go back into the Salesforce interface
- Select the tab you just modified (‘Contacts’)
- Scroll down to verify that the Evernote section has been added

In **Lightning Experience**, 
Go to the Details tab of a record to look for the ‘Evernote’ Section
To add ‘Evernote’ sections to each of your page layouts, “Opportunities”, “Leads”, “Accounts”, “Contacts”, repeat the above steps.

*Note: If you plan to install the Salesforce1 mobile app, you may want to add the Salesforce Action as you set up each of the page layouts. See Salesforce1 setup section in this installation guide for more details.*

### STEP 4. Connect Evernote and Salesforce

For individuals:
To use Evernote to view and link your personal Evernote notes:
1. Browse to the ‘Evernote’ section on any Salesforce record
2. Click **Connect** and log in with the email and password for your Evernote account
3. Skip to Step 5 to learn how to link notes

![Evernote for Salesforce](image)

For team:
If your company uses Evernote Business, you and colleagues can collaborate, view, and link notes as a team.

*Note: You must be an Evernote Business admin to connect Evernote Business and Salesforce. If you are not an Evernote Business account admin for your company’s Evernote account, request a “Business Access Code” from one of your company’s account admins, then do the following:*
Go the ‘Evernote Admin’ section:

In Salesforce Classic, click the plus (+) button from the top of the screen, then click ‘Evernote Admin’.

In Lightning Experience, go to App Launcher, select ‘Evernote for Salesforce’, then select ‘Evernote Admin’.

Sign in to your company’s Evernote Business account, then go to ‘Admin Console’ and select Salesforce from the side navigation bar.

Click Enable Salesforce Integration
Copy your “Business Access Code” and paste it into Salesforce.

Note: It is recommended that you enable auto-approval to allow all of your Salesforce users to create an account inside your Evernote Business.

Paste your “Business Access Code” into Salesforce and click Save and activate.

STEP 5. Create and link your first Evernote notes

From Salesforce, open one of your pages and find the ‘Evernote’ section. (In Lightning Experience, find the ‘Evernote’ section in the ‘Details’ tab.) You will see a list of ‘Related Notes’, which are notes from your account that Evernote automatically presents to you.

Once you link notes from your Evernote account to Salesforce record, you’ll see linked notes appear in each of your records. If your Evernote Business account is connected to Salesforce, you’ll also see any Evernote notes that colleagues have linked to Salesforce record.
Evernote for Salesforce buttons

- **View linked notes**
  ‘Linked Notes’ have been manually linked to this record by you and colleagues. ‘Related Notes’ are automatically suggested notes based upon the content of this record and the note.

  *Note: To link a note, you must have ‘Modify and Invite Others’ access to that notebook. Contact the owner of a notebook for permission.*

- **Browse your recent notes**
  See a list of your the most recently updated notes inside your Evernote account, including those from your personal, joined, and Evernote Business notebooks.

- **Search Evernote for any of your business notes**
  Search finds any notes inside your Evernote account that contain the keyword in any typed or handwritten text or inside an attached file.

- **Create and link a new note**
  Create a new note inside an Evernote Business notebook and link it to this record.
Tips and Resources

Tour and FAQ for Evernote for Salesforce Users
● See our Evernote for Salesforce Guide for a brief overview and commonly-asked questions.
● Watch Evernote Business for Salesforce introduction video

Learn how to use Evernote
● View the Evernote product guide to get started
● Read the Evernote Blog for inspiration through tips, stories, and others who use Evernote

Get Support

Self-help Support
Help & Learning site (help.evernote.com)
The Help & Learning site for all the Evernote products guides, tips and templates, and a searchable database of answers to common questions or issues.

Contact Support
Submit a support ticket or chat online with support (https://www.evernote.com/SupportLogin.action)
Any Evernote user can submit a support ticket to our customer support team. Evernote Premium and Business users receive high-priority support.

FAQs for Administrators

Does Evernote for Salesforce work on a per-user or site-wide basis?
Evernote for Salesforce is a site-wide Salesforce managed package.

What version of Salesforce do we need?

Can I add Evernote to record types such as Cases or Custom Objects?
Yes, you can add Evernote to other Salesforce record types, including Cases or Custom Objects. This requires technical expertise, so consult with your Salesforce administrator or contact Evernote Support for more details. More about adding custom Salesforce objects

If an employee leaves my business, do all the notes stay linked in Salesforce?
If an employee leaves my business, do all the notes stay linked in Salesforce?
If you’ve connected Evernote Business with Salesforce, any linked notes from business notebooks will stay with your business and all notes linked to Salesforce will remain linked.

If, however, an individual user has connected personal Evernote account with Salesforce and has linked notes, those personal notes will be unlinked in Salesforce and remain with that user.

What is the Evernote “Business Access Code”?
The Evernote “Business Access Code” is a unique code that your Evernote Business admin can find in the Evernote Business Admin Console, on the ‘Integrations’ page. An account admin pastes this code into Salesforce as part of the setup process to link Salesforce to Evernote Business. This code allows the business to collaboratively link and view notes from shared notebooks.

Will my company's linked notes ever be lost or deleted, such as if I remove the Evernote “Business Access Code” or reinstall the Managed Package?
If the Evernote “Business Access Code” is ever removed, just re-enter the “Business Access Code.” Your notes will stay linked.

Your administrator should not reinstall the Evernote Managed Package or linked notes will become unlinked (but not deleted).

More about Salesforce
Options

Option 1. Add Evernote to Salesforce1 mobile app

Evernote is integrated with the Salesforce1 mobile app so you can view, link notes, or create new notes on your mobile phone or tablet.

When you're viewing a record inside Salesforce1, you can use the ‘Publisher Action’ menu to open Evernote and see linked and related notes.

To set up Evernote for Salesforce1, start by downloading the app. Salesforce1 is available for iPhone, iPad, and iPod touch and Android. For more details, go to http://www.salesforce.com/salesforce1/
To enable the ‘Publisher Action’ menu:

Select **Setup > Build > Customize > Chatter > Settings**

Select **Enable Publisher Actions**

You'll also need to set up Evernote as a ‘Publisher Action’ inside your Salesforce records:

Edit your ‘Page Layout’ again, just as you did when you initially set up Evernote for Salesforce.

From the side navigation panel:
Select **Setup > Build > Customize > Contacts > Page Layout > Edit Layout**

In the ‘Publisher Actions’ section at the top of the page, select the ‘Override Global Publisher Layout’.

Now you can add actions to the publisher menu for this record type.
Select ‘Actions’ from the ‘Contact Layout’ section.

Drag and drop ‘**Evernote Business**’ into the ‘Publisher Actions’ section next to the ‘Post’ option.

**Click Save**
Repeat these steps to add the ‘Evernote’ action into each of your page layouts for ‘Opportunities’, ‘Leads’, ‘Accounts’, ‘Contacts’.

Option 2: Enable or disable Chatter updates (Evernote Business users)

Once you’ve connected Evernote Salesforce to your Evernote Business account, anytime you link a note in Salesforce with Evernote Business, it will show up in the ‘Chatter feed’. This guide will show you how to enable or disable those updates.

Click on your account name at the top of the Salesforce page
Select ‘Setup’
From the side navigation panel, select **Develop > Custom Settings**

Select the 'Manage' Post Notes to Chatter link on the 'Custom Settings' page

To change options for posting to Chatter:

Click **New** at the top to toggle chatter posts globally

Click the second new button to toggle by profile

Uncheck 'Post Notes To Chatter Flag' and click **Save**
To toggle this option for an individual user or profile:

Click the second **New button** as described above.

Select on **“Profile”** to turn off chatter updates for an entire profile, or click on profile and choose ‘user’ to turn off Chatter updates for a single user.

Uncheck the **“Post Notes To Chatter Flag Box”** then click **Save**

Repeat as necessary for desired profiles or users.

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**Option 3: Create a report based on note tags**

You can run a report on tags that are on notes linked to records in Salesforce. This report will only recognize tags initially on a note when it was first linked to a record.

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Select **Set Up > Create > Report Types**

On the next page, click **Continue**
Click **New Custom Report Type**

Under primary object, select **Evernote Note Tags**

Give the report a label and a description.

Choose a category of reports to store the report.

Choose ‘**deployed**’ if you would like your users to be able to use this report.

On the next screen, click **Save**.
Now navigate to reports and find the report with the name and place you chose earlier.

Select that option.

Drag ‘Note Tag’ in the preview section to get the name of the tag.

*Note: Don’t confuse the ‘Note Tag’ with the “Evernote Note Tag Name” as this won’t bring through the tag name.*

Configure the report to your needs to include things like the total number of tags, or the amount of times each tag is used.

*Note: If you don’t see Note Tag, there may be a field level security issue.*

To check the field level security issue:

1. Go to ‘App Setup’.
2. Select **Create > Objects**.
3. Select ‘Evernote Note Tag’.
4. Click on the "Note Tag" field in ‘Custom Fields and Relationships’ section.
5. Click on **Set Field-Level Security** button at the top.
6. Check ‘visible’ checkbox for the profile you want to give visibility to, then click **Save**.