Salesforce Private Team Notes - Creating and Viewing

Salesforce (SF) as a CRM is designed to share information, however, we recognize that teams sometimes need to store private notes. SOM created this functionality for teams which have requested it.

Prerequisite

- You must have access to SF
- Your team must have already requested the ability to store private notes in SF
- You must be part of the team permission set that gives you access to the private notes

General Information

- Private notes are private within a team. Teams that share a security profile also share the private notes.
- The private note record section have the team name attached to them. This is important for anyone who may have access to more than one team private note section.
- They work a little differently than standard notes, because this is expanded functionality. Today we have private notes, but for example, we may have future functionality of having private files as well. They would all be part of this base functionality.
- Because you have access to these as a team, it means you can delete other notes in this space. Be mindful of this please!

Step-by-step guide

1. You will see private notes if you are part of the security group which allows you access to them. Typically this will be listed under the public Notes. The number of private notes will follow the name of the private note group. In the example below there is only one private RECORD.

   This is the base difference in how the functions work. We are going to create a private RECORD, then attach a note (and in the future a file) to it. Think of the record as a bucket that can contain multiple private items, such as 3 notes about the same topic. Or all items related to a specific event or travel.

2. From the dropdown arrow on the right select NEW to create the new record (or bucket of info)
3. When you do this, it will create the record or bucket and bring you back to the record you are editing. The new record will show up in the private list. Think about giving your private record good names that reflect the type of information that it includes, since you can add multiple types of content.

4. Click the new record you added, in this case 2022 travel notes. This opens the record, and from here you can add any number of private notes and in the future files.

5. Click on Private Notes tab and you can enter and view the private notes on this record. The notes section inside this tab works exactly the same way as the public notes section.

6. Viewing the Private record notes and files is simple, just click through them!
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