Salesforce Public or Shared Notes - Creating and Viewing

If you are using Salesforce CRM, and have access to an appropriate object such as the Student objects or Contact object, learn how to add and view Notes

Overview

When viewing any record that is associated with a person type of object (examples include objects such as Contact, Student, Alumni, Faculty and Staff) you can add notes that can be seen and shared by other Salesforce (SF) users who also have access to that object.

For example, if both the Global Studies team and the EMBA team both have access to the Student object, they can put Notes in attached to the Student object and share the information.

Step-by-step guide

1. Open the record by clicking on the “name” field within your list.
2. You will be presented with full view of the Record (names redacted in the images for privacy reasons). Any fields that are publicly available or available based on your permission set will be visible.
3. On the right side of the screen are the available actions you can perform. Examples are log a call, create a task and underneath that will be the Notes section. Unless otherwise noted Notes are public. It is important to understand that anything you enter here is available to everyone who has access to this record. It is a great feature for sharing information!
4. You will see the entries for the last few public notes that were posted to the record for quick access. This includes the note title, date it was entered and the person who entered the note.
5. To add a new note, click on the down-arrow to the right of the the word Notes. In this example the number in parenthesis (1) is the number of Notes attached to this record.

This will present the Note entry screen.
6. Once you have entered a title and the content of your note click **Done**, which will save the note and return you back to the record.

7. Once the Note is saved, it will appear as the most current note.

8. Reading notes are simple, just click on the title!
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