

Working with Salesforce Notes & Enhanced Notes

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Working with Salesforce Notes

If you are sending data from the Salesforce connector to Salesforce Notes or Enhanced Notes, you will need to follow additional steps in order to share the note you are creating with other Salesforce users.

To begin, in order to send data to Salesforce Notes, you need to create a "ContentNote" record in your connector:

1 - Create new ContentNote record

Create Tip: Missing an object? [Try refreshing the list.](#)

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Title <i>(required)</i>	Formula = Test Title
Content	Formula = %%RESPONSE_TEXT%%

If you would like your Salesforce notes to only be available for yourself, under your "Files owned," then you do not need to complete any additional steps.

However, if you would like your notes to be available for others, then you will need

to add a "Create ContentDocumentLink" step in your connector, that is dependent on your "ContentNote" step.

Once you have created the "Create ContentDocumentLink" step, you can map the "linked entity ID" field to the ID of any contact creation/update step that appears earlier in the connector. By doing so, this note will be available to the contact record that is being created or updated. You should also map the "Share Type" field to a formula with a value of "I" as shown below.

The screenshot shows a configuration window titled "2.1.1 - Create new ContentDocumentLink record". At the top right, there is an "Ok" button. Below the title bar, there is a "Create" dropdown menu and a "ContentDocumentLink" dropdown menu. A tip reads: "Tip: Missing an object? Try refreshing the list." To the right of the tip is a "Skip this step if..." checkbox. The main configuration area is divided into two sections: "RELATIONSHIP" and "FIELD MAPPING".

RELATIONSHIP
Select the ContentDocumentLink field that references the parent ContentNote:
ContentDocument ID

FIELD MAPPING
Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Linked Entity ID	Record ID of 2. Contact
Share Type	Formula = I