



PIN **Tags**

Installation and Configuration Guide

(Salesforce Lightning Experience)



Powered By Cloud Analogy

Table of Content

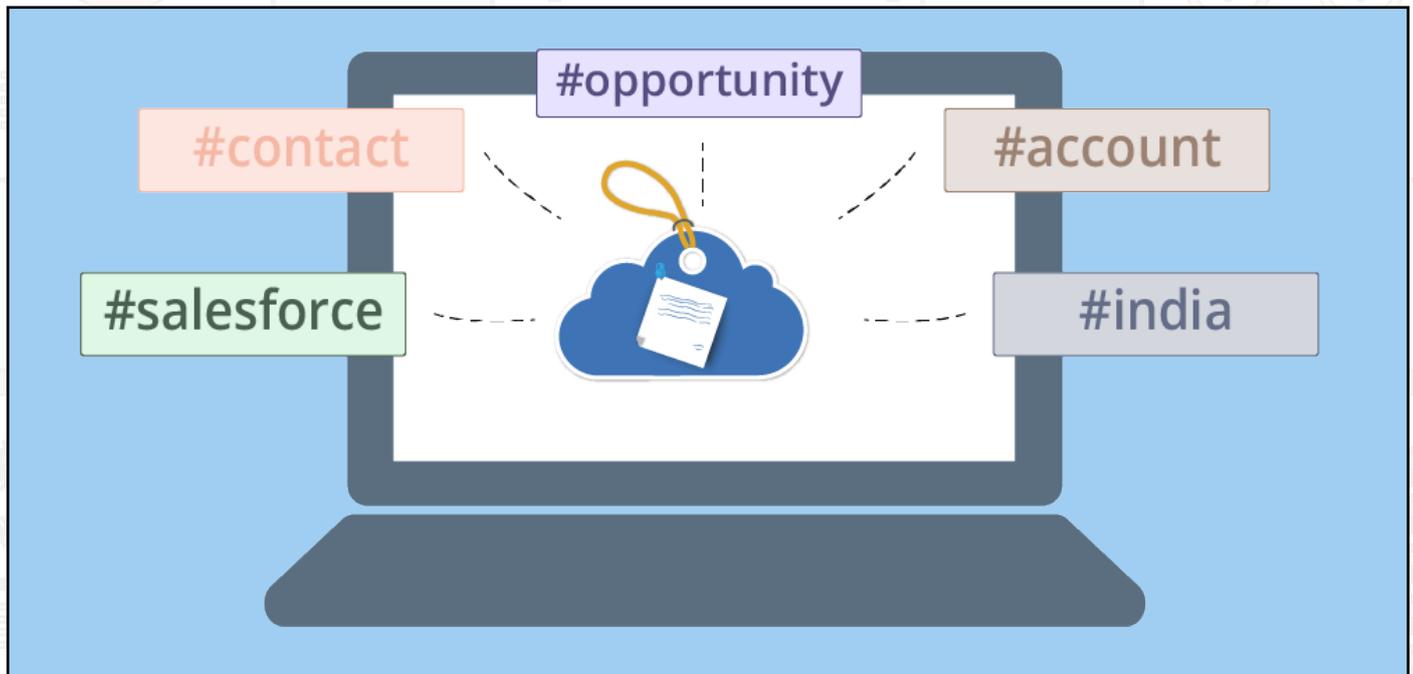
Introduction -----	03
Requirements -----	03
Installation -----	04
How to set up the App -----	06
Assign Licenses to users.....	06
Add Pin Tags Component to SObject Page.....	07
How to use the App -----	09
Add Tags to Record Details.....	09
Pin Tags Configurations.....	11
Mass Create Configuration.....	11
Tag Recommendation.....	14
Color Configuration.....	16
User Configuration.....	17
Object Configuration.....	20
Standard Tab.....	22
Dashboard Tab.....	23
Search Tab.....	24
Delete Tab.....	26

Introduction



Welcome to “Pin Tags” for Salesforce. This user guide will provide step by step instructions for administrators to install and configure the application. This app will help you to use Tags in Salesforce Classic.

You can add a tag to any object in Salesforce.



Requirements

1. Works for latest Browsers version of Chrome, Firefox, Internet Explorer and Safari.



2. Does not work in Safari 5 Windows.



Installation



1. To access our App, go to App Exchange and type in "Pin Tags". Select the App and click on "Get It Now".

ALL APPS > SALES > SALES INTELLIGENCE
Pin Tags by Cloud Analogy

By Cloud Analogy Softech pvt ltd

\$1.99 USD per user per month
Discounts available for nonprofits

Get It Now

RATING: ★★★★★ (20) LISTED ON: 12/5/2017 LATEST RELEASE: 6/27/2019

CATEGORIES: Sales Intelligence **Watch Demo** **Test Drive**

1 month 10 license free trial. Install and use the app once you are able to
Tag your important records, high cost Opportunities, critical Case or region wise Accounts in Salesforce lightning experience and in Salesforce Classic also. We know you missed it!

2. Accept the terms and conditions then click on "Confirm and Install".

Confirm Installation Details

Here are the details we'll share from your profile [Edit Profile](#)

*First Name Ibran *Company Cloud Analogy Softech pvt ltd
*Last Name Ali *Country India
*Job Title QA State/Province
*Email ibran.ali@cloudanalogy.com
Phone

I have read and agree to the terms and conditions.

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Confirm and Install

3. Select the type according to your business needs and hit the "Install" button.



Install Pin Tags by Cloud Analogy

By Cloud Analogy Softech pvt ltd

Install for Admins Only

Install for All Users

Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Pin Tags by Cloud Analogy	Cloud Analogy Softech pvt ltd	Spring 2019	1.38

Description

Tag your important records, high cost Opportunities, critical Case or region wise Accounts in Salesforce lightning experience and in Salesforce Classic also. We know you missed it!

[Additional Details](#) [View Components](#)

4. Click on Done.

You are directed to below-Installed Packages page.



Installed Packages

Installed Packages

Help for this Page ?

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.



Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppE
Uninstall Manage Licenses	Pin Tags	Cloud Analogy Pty. Ltd.	1.21	LightningTags	Trial	1	1	2/9/2019	1/10/2019 11:31 PM		1	3	6	Pass
Description		Now add tags in Lightning too!												

Uninstalled Packages

No uninstalled package data archives



How to Set Up the App



Assign Licenses to users

The app can be used by the users (other than System Admin) if they have been assigned the license of the app. Follow these steps to assign the app license to a user:

1. Click on the "Manage Licenses" under the Installed Packages.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

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Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects
Uninstall Manage Licenses	Pin Tags	Cloud Analogy Softech Pvt Ltd	1.38	LightningTags	Trial	10	1	8/1/2019	7/2/2019 5:04 AM	<input type="checkbox"/>	1	4	7

Description
Now add tags in Lightning tool!

Uninstalled Packages

No uninstalled package data archives

2. Click on "Add Users".

Package Details
Pin Tags

[Back to Previous Page](#)

Package Name	Pin Tags	Publisher	Cloud Analogy Softech Pvt Ltd
Status	Trial	Allowed Licenses	10
Expiration Date	7/31/2019	Used Licenses	1

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Licensed Users **Add Users** Remove Multiple Users

Action	Full Name ↑	Role	Active	Profile
Remove	Ibran, Ali		<input checked="" type="checkbox"/>	System Administrator

3. Now select the user from "Available Users" and then click on "Add" button.



Add Users
Pin Tags Help for this Page ?

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name ↑	Role	Active	Profile
<input checked="" type="checkbox"/>	Jaiswal, Rajat		✓	Standard Platform User
<input type="checkbox"/>	User, Integration		✓	Analytics Cloud Integration User
<input type="checkbox"/>	User, Security		✓	Analytics Cloud Security User

Selected Users

Action	Full Name
<input checked="" type="checkbox"/>	Jaiswal, Rajat

Add Pin Tags component to SObject Page

You can add this component to any object's record detail page. Following are the instructions to add the Pin Tags component to any object's record detail page:

1. If you want to add this component to Account Object, go to the Account Tab and open an Account record.

Account
Burlington Textiles Corp of America

Type: Customer - Direct | Phone: (336) 222-7000 | Website: www.burlington.com | Account Owner: Ali Ibran | Account Site: | Industry: Apparel

Related | Details | News

Contacts (1) [New](#)

Jack Rogers
Title: VP, Facilities
Email: jrogers@burlington.com
Phone: (336) 222-7000

[View All](#)

Opportunities (1) [New](#)

[Burlington Textiles Weaving Plant Generator](#)

Activity | Chatter

New Task | Log a Call | New Event | Email

Create a task... [Add](#)

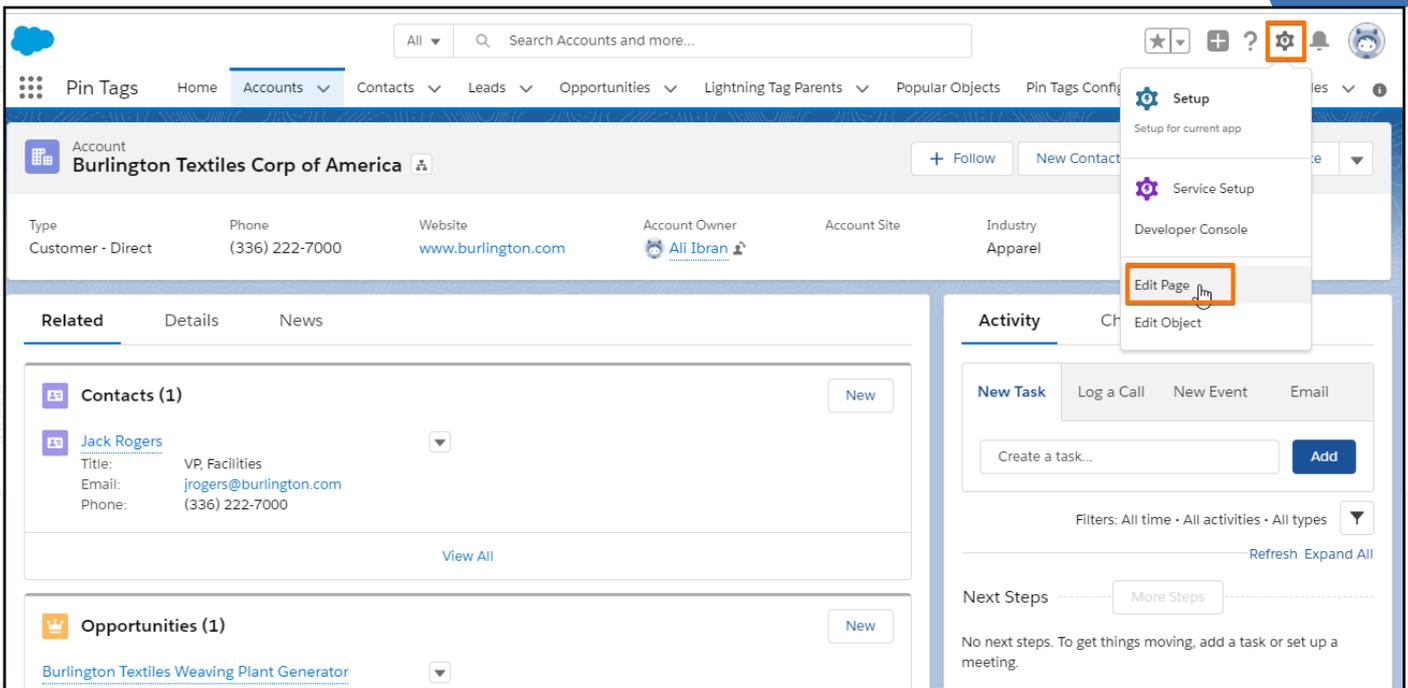
Filters: All time · All activities · All types

[Refresh](#) [Expand All](#)

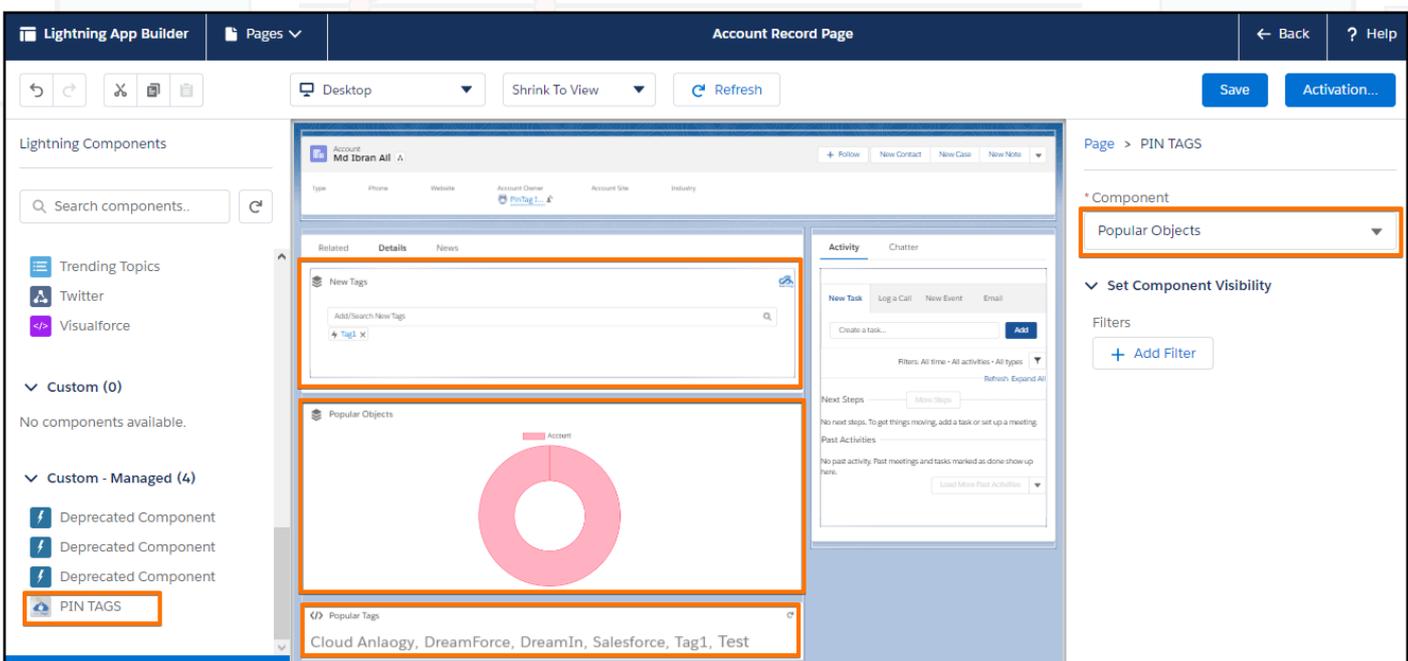
Next Steps [More Steps](#)

No next steps. To get things moving, add a task or set up a meeting.

2. For adding the Pin Tag Component, go to setup(gear icon) in the upper right corner and select Edit Page button from the drop-down list.



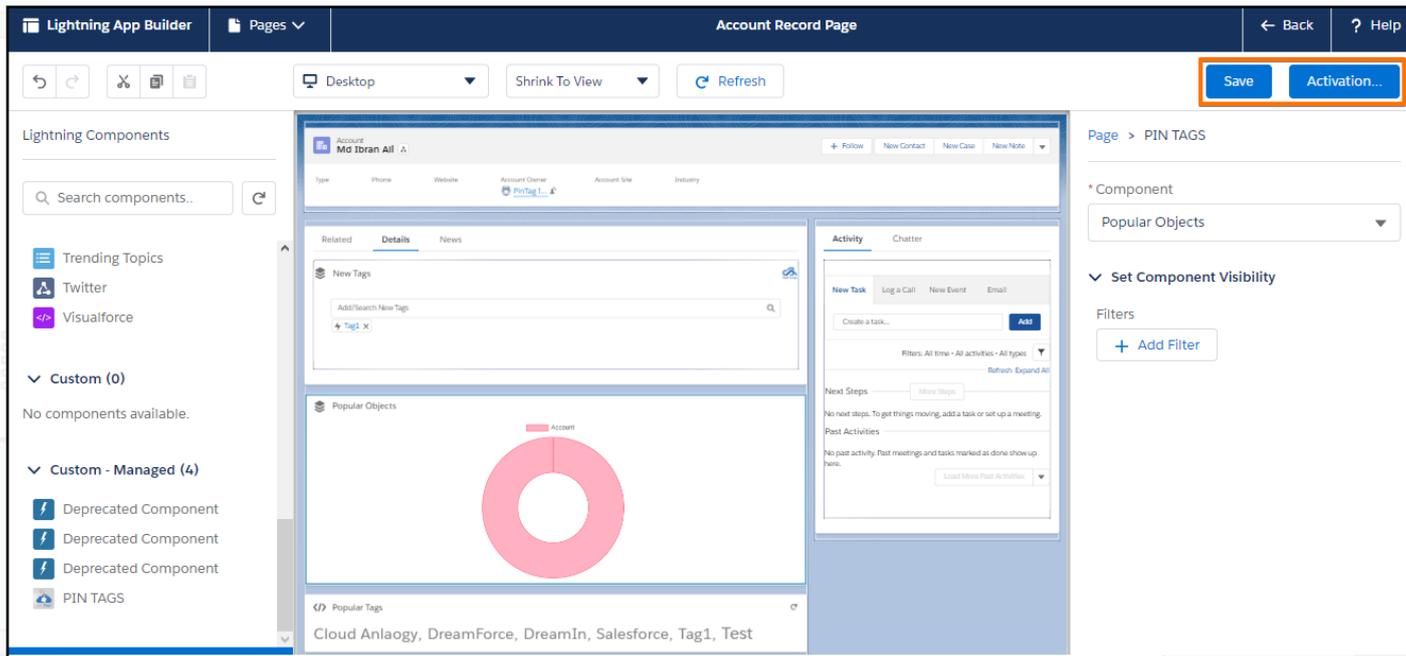
3. After selecting Edit Page, add the Pin Tags component by dragging it from the menu on the left side and dropping it over the place in the page where you want to add it and then from the right side drop down list select the component you want to add. Select the name of the Component from the right side.



If you are Installing it for the first time then you have to deploy domain to get custom components. Add "PIN TAGS" component again and choose other components from the drop down if you want to add other components also.



4. After adding your Tag component on the detail page, click the Save button and then click on the Activation button.

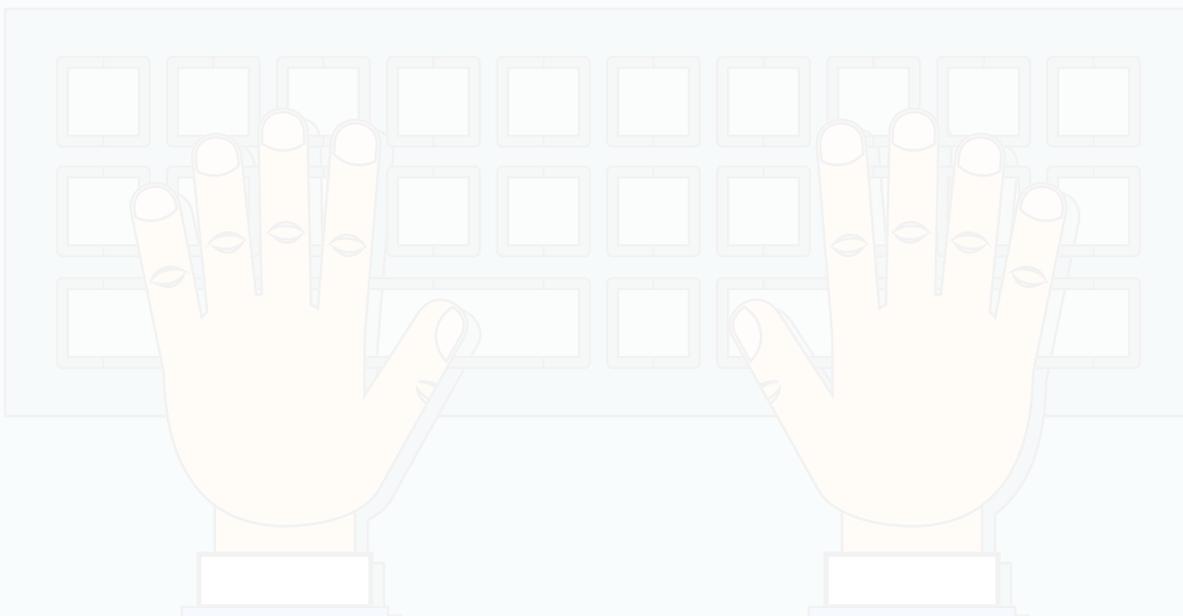


How to use the app

Add tags to Record Details

To Add a Tag on the record detail page follow these steps:

1. Type the Name of the tag you want to create.
2. Select "Create New Public Tag" on the record page.
3. Select "Create New Personal Tag" on the record page.





Account
Burlington Textiles Corp of America

Related **Details** News

New Tags

Salesforce1

Q "Salesforce1" in New Tags

- + Create New Public Tag: **Salesforce1**
- + Create New Personal Tag: **Salesforce1**

Popular Objects

Account Contact Opportunity

After adding a new tag, you can refresh the popular tags and can see the results.

Account
Burlington Textiles Corp of America

Related **Details** News

New Tags

Add/Search New Tags

Cloud Cloud Anlaogy

Popular Objects

Account Contact Opportunity

Popular Tags

Capital, **Cloud**, Cloud Analogy QA, Cloud Anlaogy, Delhi, DreamForce, DreamIn, Finance, Housing, India, Loan, MeetUp, Salesforce, Tourism



Now, If you want to add this component to other Standard or Custom Objects then follow the same steps as above. Also, you can use this component in task and events also.



Pin Tags Configurations

Pin Tags provide many features to use tags efficiently and effectively. To use these features click on the Pin Tags Configurations tab.

Quarterly Performance As of Jan 30, 2019 5:50:02 AM

CLOSED \$1,820,000 OPEN (>70%) \$270,000 GOAL --

Assistant

Nothing needs your attention right now. Check back later.

Here are ten different sub-tabs under the Pin Tags Configuration.

Cloud Analogy Pin Tags

Dashboard

Search

Page Creations

Mass Tag Creations

Tag Recommendation

Tag Colors

User Managements

Object Managements

Standard Tags

Delete Tags

Ali Ibran Rajat Jaiswal

	USER NAME	TOTAL TAGS
1	Ali Ibran	33
2	Rajat Jaiswal	4

Mass Create Configuration:

Mass Create Configuration provides you with the ability to add existing tags on many records simultaneously.

1. Select any object from the "Salesforce Object" drop-down list.



Cloud Analogy PHT Tags

Home

Dashboard

Search

Page Creations

Mass Tag Creations

Tag Recommendation

Tag Colors

User Managements

Object Managements

Standard Tags

Delete Tags

Mass Create Configuration

Mass Tag Existing Rule

Mass Tag Creation

Salesforce Object

Account

Filter Records Reset/Refresh

--- None ---

Campaign

Account

Contact

Lead

Opportunity

Product

Case

Task

Search

2. Now click on the “+ Add Tags” button.

Dashboard

Search

Page Creations

Mass Tag Creations

Tag Recommendation

Tag Colors

User Managements

Object Managements

Standard Tags

Delete Tags

Mass Create Configuration

Mass Tag Existing Rule

Mass Tag Creation

Salesforce Object

Account

Filter Records Reset/Refresh

Records based on Selected Object

Show 5 entries

Search

NAME
1 Burlington Textiles Corp of America
2 Dickenson plc
3 Edge Communications
4 Express Logistics and Transport
5 GenePoint

Showing 1 to 5 out of 12 entries Pages: 1/3

First Previous Next Last

+ Add Tags

3. After that “Create/Search Tags” and then click on the “Proceed” button.



Create/Search Tags

"Dream" in New Tags

DreamIn

DreamForce

Create New Public Tag: **Dream**

Create New Personal Tag: **Dream**

X Cancel Proceed

4. You can also use the "Filter Records" option to select particular records of an object. To use this option, click on the "Filter Records" button.

Mass Create Configuration

Mass TagExisting Rule

Mass Tag Creation

Salesforce Object

▼ Filter Records ↺ Reset/Refresh

Records based on Selected Object

Show entries

	NAME
1	Burlington Textiles Corp of America
2	Dickenson plc

5. Select the value of "Field", "Operator", and enter "Compare Value" and then click on the "Proceed" button.



Filter Criteria

Conditions

1.	* Fields choose one...	* Conditions choose one...	* Compare Value <input type="text"/>	+
----	---------------------------	-------------------------------	---	---

[Cancel](#) [Save Rule & Proceed](#) [Proceed](#)

Tag Recommendation:

1. Click on "Tag Recommendation" tab

The screenshot shows the Cloud Analogy PIR Tags interface. The sidebar on the left contains the following menu items: Dashboard, Search, Page Creations, Mass Tag Creations, **Tag Recommendation** (highlighted with an orange box), Tag Colors, User Managements, Object Managements, Standard Tags, and Delete Tags. The main content area is titled "Tag Recommendation" and features a "+ New Rule" button in the top right corner. Below this is a section titled "List of all Existing Rules" which includes a "Show 5 entries" dropdown, a search bar, and a table with columns: NAME, RULE OBJECT, RULE EXPRESSION, and FILTER LOGIC. The table currently displays "No data available in table". At the bottom, it shows "Showing 0 to 0 out of 0 entries" and "Pages: 0/0" with navigation buttons for First, Previous, Next, and Last.

2. Click on "+ New Rule" tab.

This screenshot is identical to the previous one, but with the "+ New Rule" button in the top right corner of the "Tag Recommendation" section highlighted with an orange box.

3. Fill the form and click on the "Save" button.



New Rule

Information

*Name: Rule-1 *Rule Object: Account

Conditions

1. *Fields: Account Name *Conditions: CONTAINS ANY *Compare Value: Ibran

Recommended Tags

*Add/Search Tags: salesforce

Q "salesforce" in New Tags

⚡ Salesforce

Bell icon  will pop up on records which come under the rule

4. Click on Bell icon to see the Recommended Tag

Account: Md Ibran Ali

Type: Phone: Website: Account Owner: Ali Ibran

Related: **Details**: News

New Tags  

Add/Search New Tags: Cloud MeetUp India Delhi

⚡ Salesforce

Cancel Add

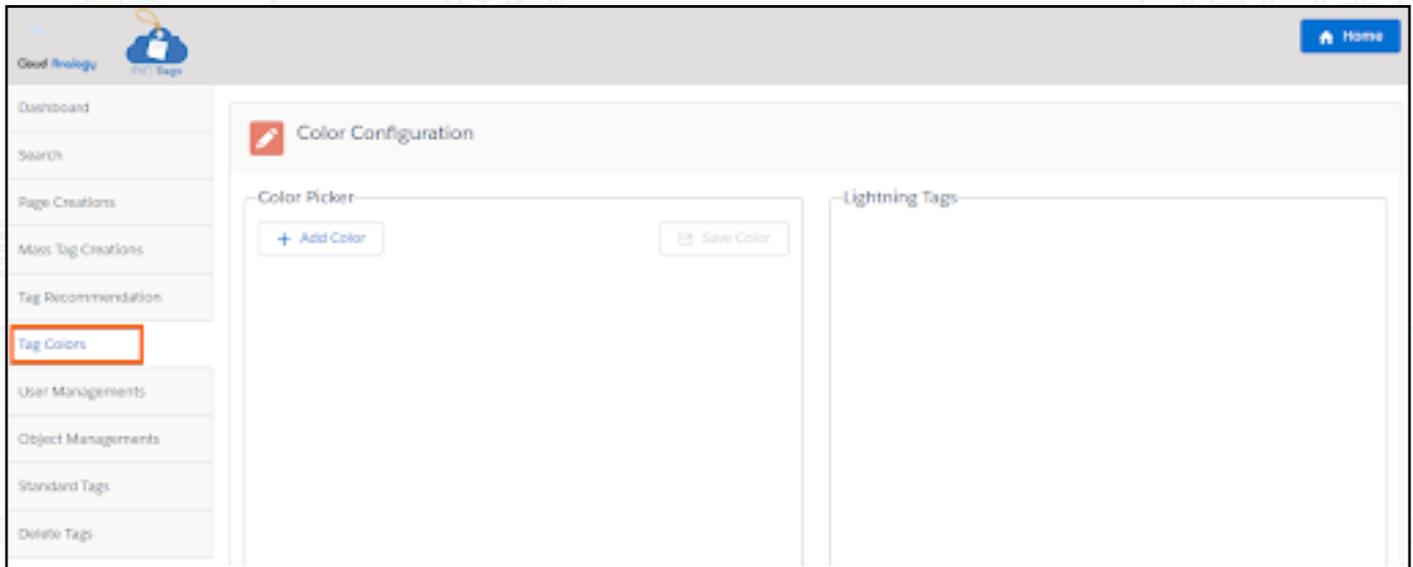
Popular Objects: Account Contact Opportunity

Color Configuration:

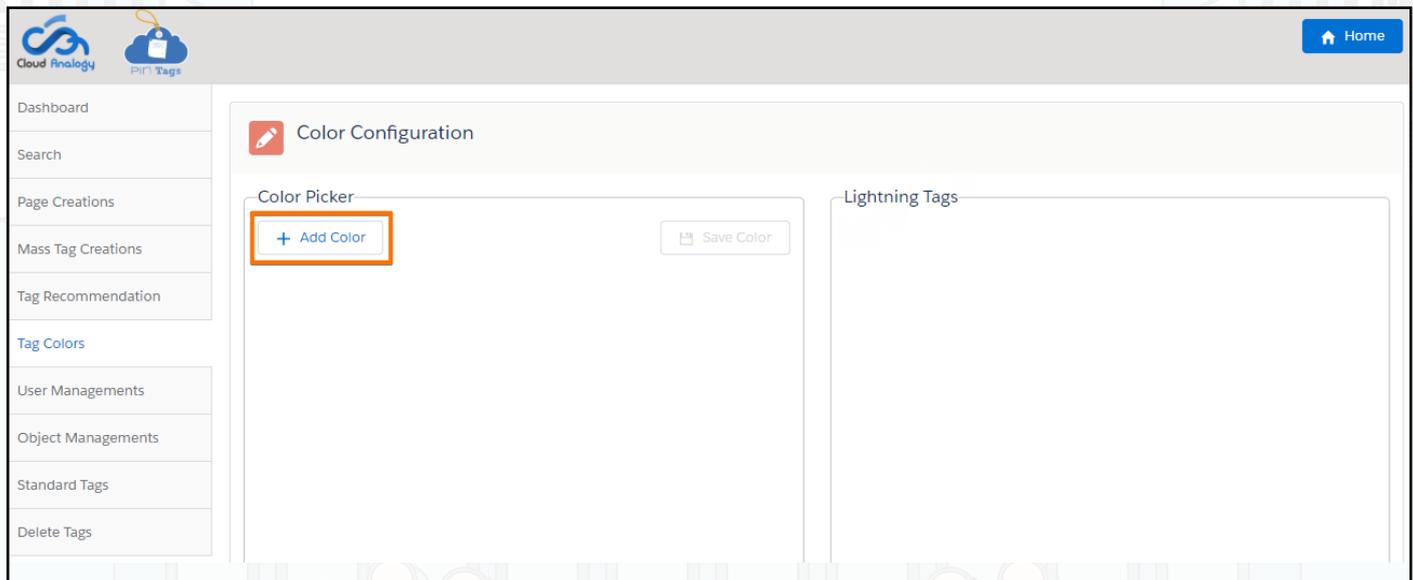


Color Configuration is used to give different colors to the tags.

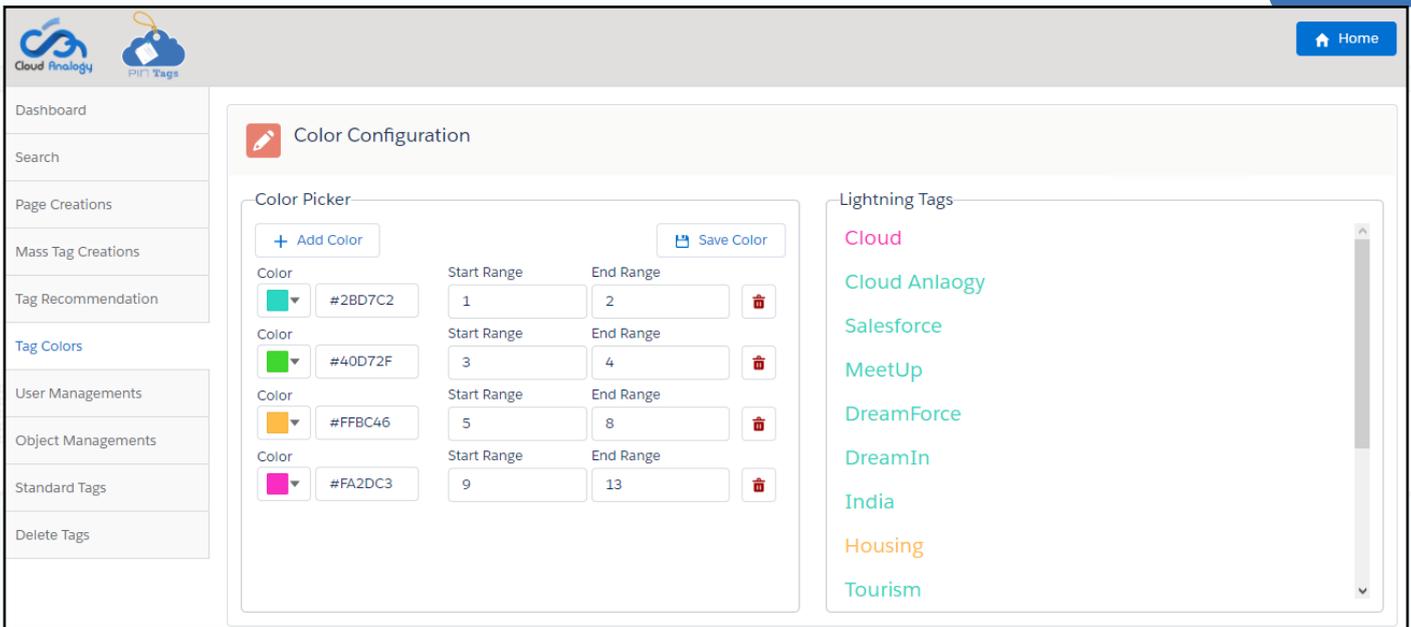
1. Click on "Tag Color" tab.



2. Click "+Add Color" button.



3. Select the color from the drop-down list and then enter the start and end range. Now click on "Save Color" button.



User Configuration

System Admin can provide different permissions to different users. There are 4 types of permissions:

- READ - User can only view the tags added by System Admin to a record.
- ADD - System Admin can provide access to adding the tag to other users
- CREATE - User can also create the tags.
- DELETE - User can only delete the tags he has created.
- PRIVATE - User can only view the tags he has created. Tags created by other users are not visible to him.

1. Click on "User Managements".



CloudAnalogy PINTags Home

Dashboard
Search
Page Creations
Mass Tag Creations
Tag Recommendation
Tag Colors
User Managements
Object Managements
Standard Tags
Delete Tags

User Configuration

Show 5 entries User Details (Approved, Private, Denied) Search

READ	ADD	CREATE	DELETE	PRIVATE	USERNAME	FULL NAME
					autoproc@00d0o0000017efkeam	Automated Process
					pintag1@cloudanalogy.com	Rajat Jaiswal
					integration@00d0o0000017efkeam.com	Integration User
					insightssecurity@00d0o0000017efkeam.com	Security User
					chatty.00d0o0000017efkeam.pn30e24bwbnb@c...	Chatter Expert

Showing 1 to 5 out of 5 entries Pages: 1/1

2. Click the “Red icon” of that user for which System Admin(you) want to set permissions.

CloudAnalogy PINTags Home

User Configuration

Show 5 entries User Details (Approved, Private, Denied) Search

READ	ADD	CREATE	DELETE	PRIVATE	USERNAME	FULL NAME
					autoproc@00d0o0000017efkeam	Automated Process
					pintag1@cloudanalogy.com	Rajat Jaiswal
					integration@00d0o0000017efkeam.com	Integration User
					insightssecurity@00d0o0000017efkeam.com	Security User
					chatty.00d0o0000017efkeam.pn30e24bwbnb@c...	Chatter Expert

Showing 1 to 5 out of 5 entries Pages: 1/1

3. Also, System Admin has to assign the permission set of Pintag to the user. Click on the “Edit Assignment” of that user whom you want to assign permission.



SETUP
Users

Used Data Space	4 KB [View]
Used File Space	0 B [View]
Last Login	7/1/2019 3:36 AM
Last Password Change or Reset	6/27/2019 5:41 AM
Failed Login Attempts	0 i

Created By [PinTag Ibran](#), 1/30/2019 7:20 AM
Modified By [PinTag Ibran](#), 7/2/2019 5:39 AM

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help ?](#)

No records to display

Permission Set Assignments: Activation Required [Edit Assignments](#) [Permission Set Assignments: Activation Required Help ?](#)

No records to display

4. Move Pin tags from "Available Permission Sets" to "Enabled Permission Sets". Then click on Save.

SETUP
Permission Sets

Permission Set Assignments
Ibran TestUser2

[Save](#) [Cancel](#)

Available Permission Sets		Enabled Permission Sets
<ul style="list-style-type: none">CRM UserPin TagsSales Cloud UserSalesforce Console UserService Cloud UserStandard Einstein Activity Capture	Add Remove	--None--

[Save](#) [Cancel](#)

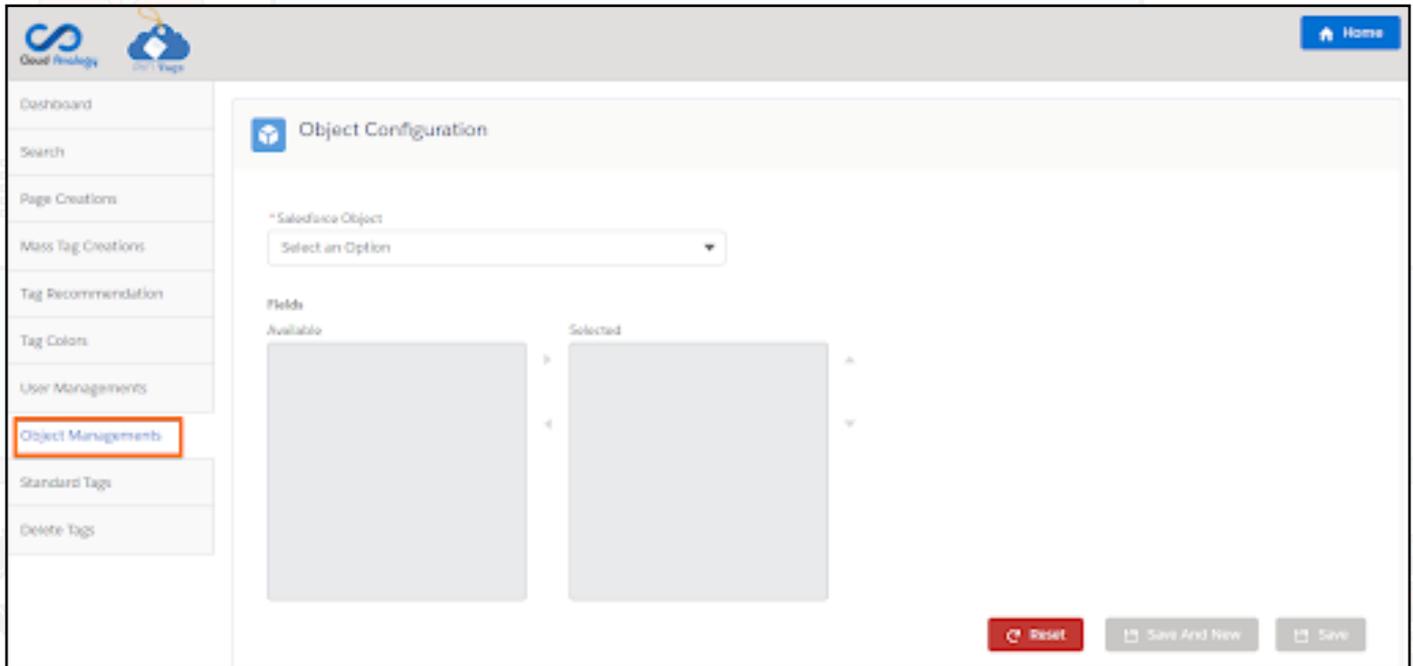
5. Now the user(whom System Admin has assigned the permission) can use the app feature according to the assignment given to him.

Object Configuration:

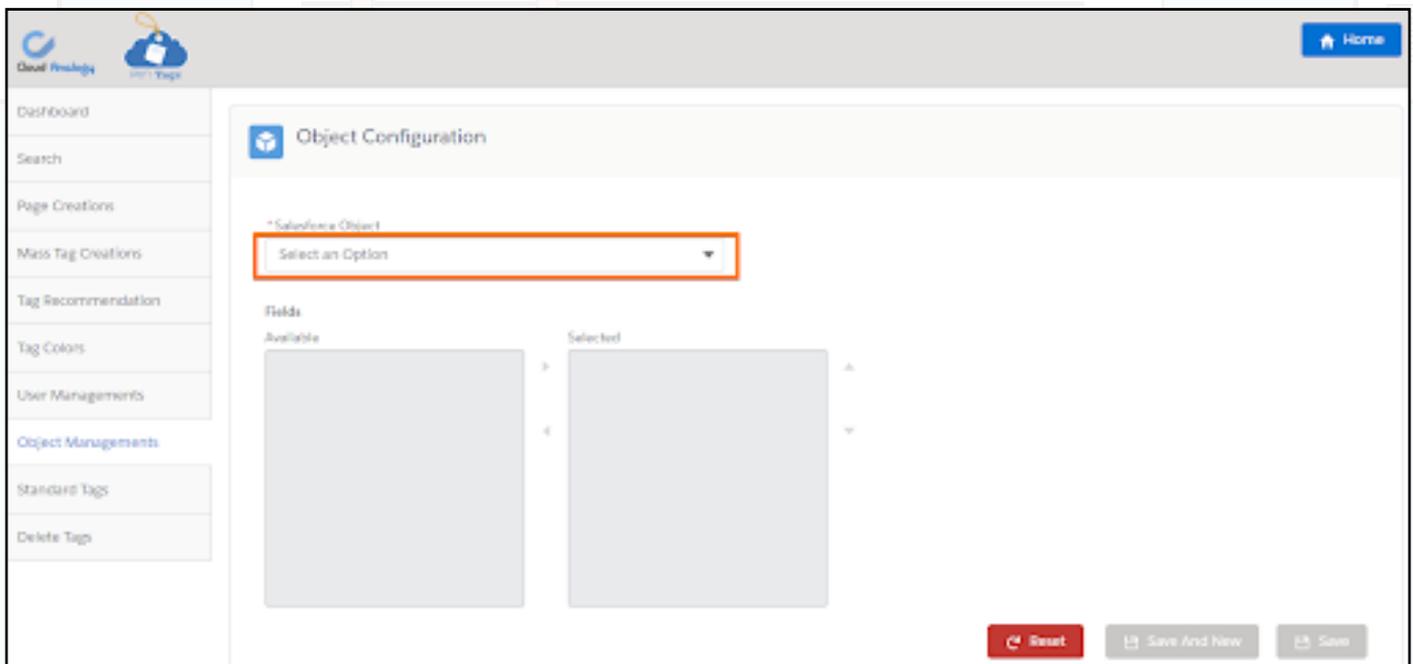


Object Configuration lets you decide what fields you want to see on the Tab Detail Page.

1. Click on "Object Managements".



2. Select an object from the drop-down list.



3. Insert the fields from Available to Selected and then click on the Save button.



Object Configuration

* Salesforce Object
Account

Account Fields

Available

- Deleted
- Master Record ID
- Parent Account ID
- Billing State/Province
- Billing Zip/Postal Code
- Billing Latitude
- Billing Longitude

Selected

- Account Name
- Account Type
- Billing Street
- Billing City
- Billing Country

Reset Save And New Save

If you want to “Save” more object fields then click on “Save and New” button. If you want to reset the changes just click on “Reset”.

4. Now click on any tag. You will see the selected fields of the objects.

Cloud Lightning Tags

Export to PDF Export to Excel Email Close

Account - (13 records)

ACCOUNT NAME	ACCOUNT TYPE	BILLING STREET	BILLING CITY
Edge Communications	Customer - Direct	312 Constitution Place Austin, TX 78767 USA	Austin
Burlington Textiles Corp of America	Customer - Direct	525 S. Lexington Ave	Burlington
Pyramid Construction Inc.	Customer - Channel	2 Place Jussieu	Paris
Dickenson plc	Customer - Channel	1301 Hoch Drive	Lawrence
Grand Hotels & Resorts Ltd	Customer - Direct	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	Chicago
United Oil & Gas Corp.	Customer - Direct	1301 Avenue of the Americas New York, NY 10019 USA	New York
Express Logistics and Transport	Customer - Channel	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	Portland
University of Arizona	Customer - Direct	888 N Euclid Hall's Center, Room 501 Tucson, AZ 85721 United States	Tucson
United Oil & Gas, UK	Customer - Direct	Kings Park, 17th Avenue, Team Valley Trading Estate, Gateshead, Tyne and Wear NE26 3HS United Kingdom	
United Oil & Gas, Singapore	Customer - Direct	9 Tagore Lane Singapore, Singapore 787472 Singapore	Singapore
GenePoint	Customer - Channel	345 Shoreline Park Mountain View, CA 94043 USA	Mountain View
sForce		The Landmark @ One Market	San Francisco
Md Ibran Ali			

Also, you can save the information(records) as a PDF or Excel by clicking on “Export to PDF” and “Export to Excel”. It also allows sending the same information to any person via email.

Standard Tab:



Note: "Standard Tags" tab will appear when Standard Tag is enabled

Steps to Enable Standard Tag:

- a. From Setup, enter **Tag Settings** in the Quick Find box, then select **Tag Settings**.
 - b. Select **Enable Personal Tags** and **Enable Public Tags** to **allow** users to add personal and public **tags** to records. ...
 - c. Specify which objects and page layouts display **tags** in a **tag** section at the top of record detail pages. ...
 - d. Click Save.
1. Click on "Standard Tags" tab

Object Name	Total Personal Tags	Action
Account Tag (AccountTag)	3	Copy Personal Tags
Asset Tag (AssetTag)	0	Copy Personal Tags
Campaign Tag (CampaignTag)	0	Copy Personal Tags
Case Tag (CaseTag)	0	Copy Personal Tags
Contact Tag (ContactTag)	0	Copy Personal Tags
Contract Tag (ContractTag)	0	Copy Personal Tags
Event Tag (EventTag)	0	Copy Personal Tags

2. Click on "Copy Personal Tags" button



Standard Tags

Object Name	Total Personal Tags	Action
Account Tag (AccountTag)	3	Copy Personal Tags
Asset Tag (AssetTag)	0	Copy Personal Tags
Campaign Tag (CampaignTag)	0	Copy Personal Tags
Case Tag (CaseTag)	0	Copy Personal Tags
Contact Tag (ContactTag)	0	Copy Personal Tags
Contract Tag (ContractTag)	0	Copy Personal Tags

Note: You will receive an email after successfully copying all the Standard tags in Pintag.

Dashboard Tab:

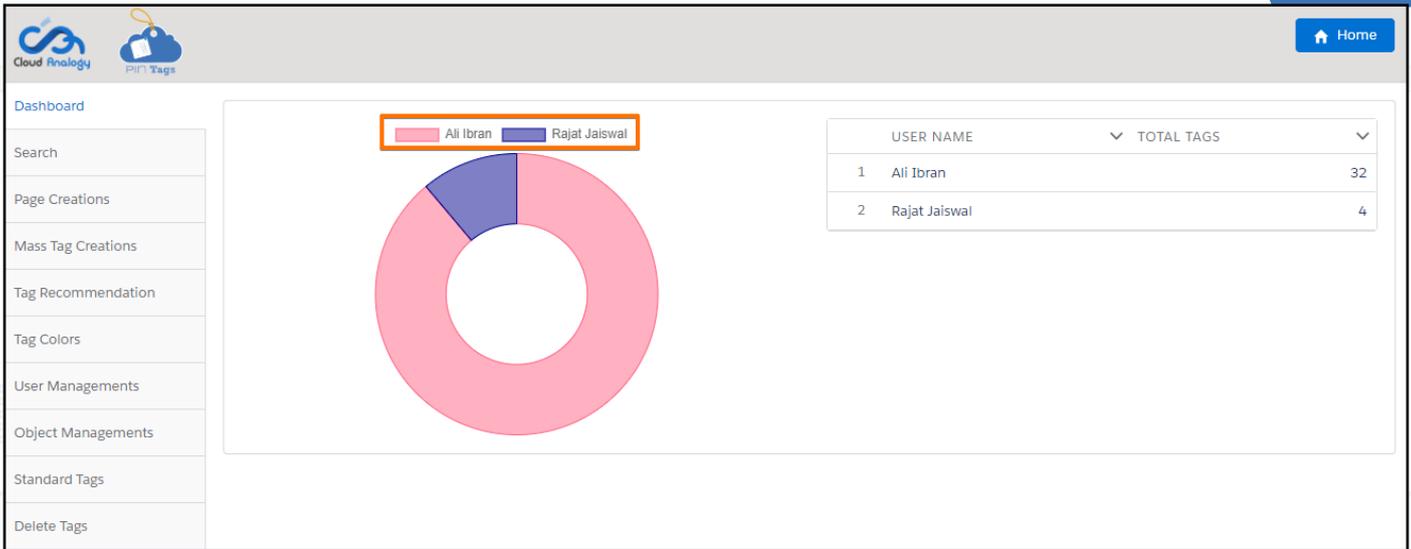
The dashboard is always open as the default tab

1. Click on "Dashboard" tab

Dashboard

USER NAME	TOTAL TAGS
1 Ali Ibran	32
2 Rajat Jaiswal	4

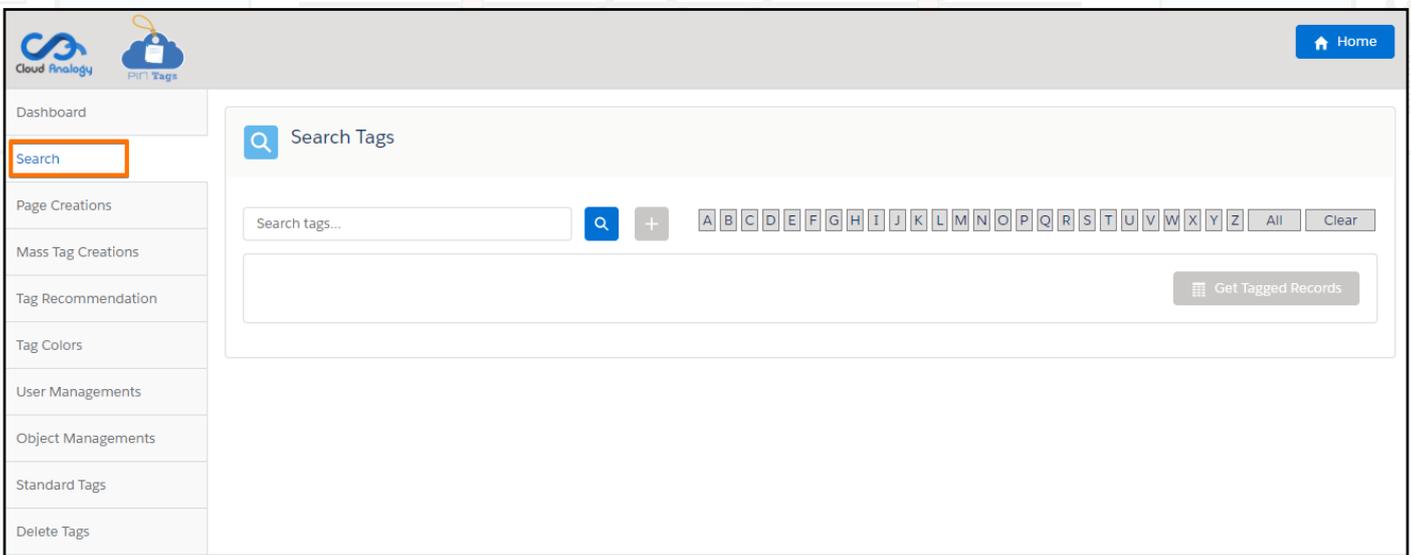
2. Click on the User Name to see the number of Tags used by any particular User



Also, you can see the number of Tags used by every user by hovering the cursor on the chart.

Search Tab:

1. Click on "Standard" tab



2. Enter the Tag name and click on the search icon.



3. Search another Tag by clicking on the “+” icon

4. Select Tag/s, select toggle button(AND/OR) and click on “Get tagged Records” button

Delete Tab:



1. Click on "Deleted" tab

Cloud Analogy PINTags Home

Dashboard
Search
Page Creations
Mass Tag Creations
Tag Recommendation
Tag Colors
User Managements
Object Managements
Standard Tags
Delete Tags

<> Delete Tags of Inactive Users

You don't have inactive users or Tags created by them.

2. Click on "Delete All Tags" button of an inactive user which you want to delete

Cloud Analogy PINTags Home

Dashboard
Search
Page Creations
Mass Tag Creations
Tag Recommendation
Tag Colors
User Managements
Object Managements
Standard Tags
Delete Tags

<> Delete Tags of Inactive Users

User Name	Total Tags	Action
Rajat Jaiswal (pintag1@cloudanalogy.com)	4	Delete All Tags

3. Click on the "Yes" button for confirmation

Confirmation

Are you sure to delete all Tags created by user: **Rajat Jaiswal** ?



RAJAT JAISWAL

Author



AJAY KUMAR DUBEDI

Product Owner

THANK YOU

Cloud Analogy Softech (P). LTD



www.cloudanalogy.com



pintags@cloudanalogy.com



[cloudanalogy](https://www.instagram.com/cloudanalogy)



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