Cloud Analogy

Understanding **PinTags Inside Out**

Welcome To

PinTags User Manual & Configuration Guide

"Simplifying CRM Organization in Salesforce Lightning Experience"

Powered By Cloud Analogy

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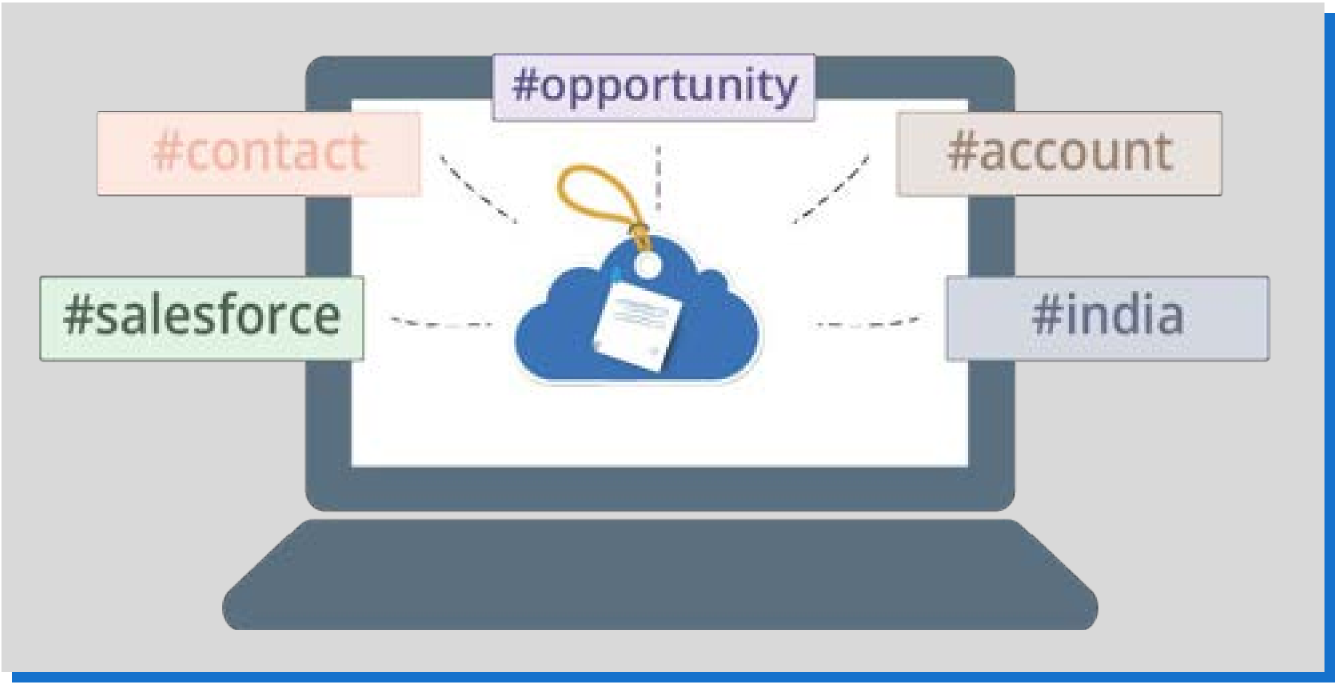
Introduction

Welcome to the PinTags User Manual Guide, an ultimate guide to help you understand how to make the most out of PinTags, a futuristic AppExchange app designed to help Salesforce users classify, describe, and organize their data through personalized tags.

Compatible with Salesforce Classic and Lightning Experience, PinTags allows users to assign custom keywords or labels to any object, including custom or standard ones. This enables users to categorize records, leads, opportunities, cases, contacts, and accounts easily, making data management intuitive and efficient.



Key Features

- **Versatility:** Tag any Salesforce object, custom or standard, with just a few clicks.
- **Personalization:** Customize your tags to reflect your business needs and preferences.
- **Compatibility:** Seamlessly integrates with both Salesforce Classic and Lightning Experiences.

- **Efficiency:** Improve data management, making categorizing and exploring records easier.
- **Advanced Configuration:** Offers mass tagging, tag recommendations, color coding, and more.

Requirements

1. **Salesforce Edition:** Enterprise, Unlimited, or Developer.
2. **Salesforce Experience:** Supports both Classic and Lightning Experience.
3. **User Permissions:** Salesforce System Administrator or AppExchange Download permissions.
4. **Browser Compatibility:**

- Latest versions of Chrome, Firefox, Internet Explorer, and Safari.

- PinTags does not support Safari 5 on Windows.

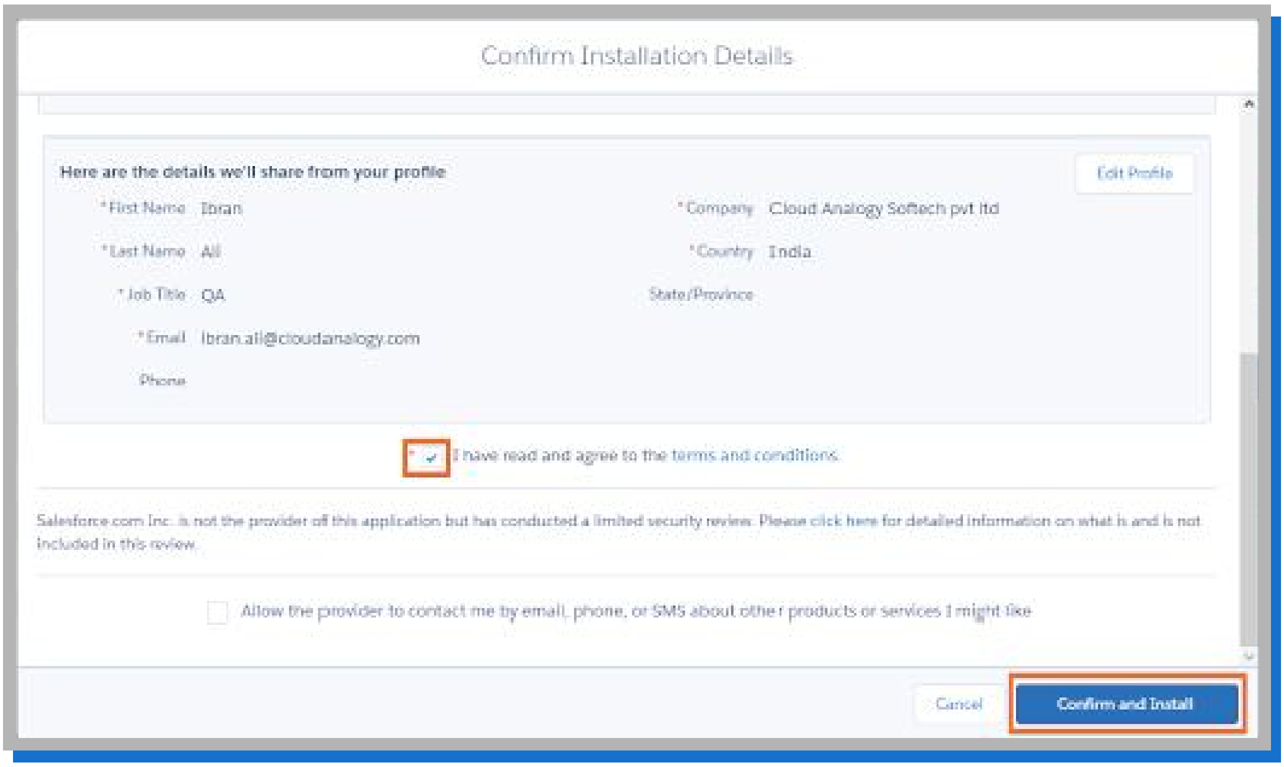
Installation

To install PinTags in your Salesforce org, follow these steps:

1. Initiate Installation:

- Click the "Get It Now" button on the PinTags app page.

- Accept the terms and conditions, then click "Confirm and Install."



Choose Installation Type:

- **Install for Admins Only:** Restrict app access to administrators.
- **Install for All Users:** Make the app available to all Salesforce users.
- **Install for Specific Profiles:** Select specific user profiles that can access the app.

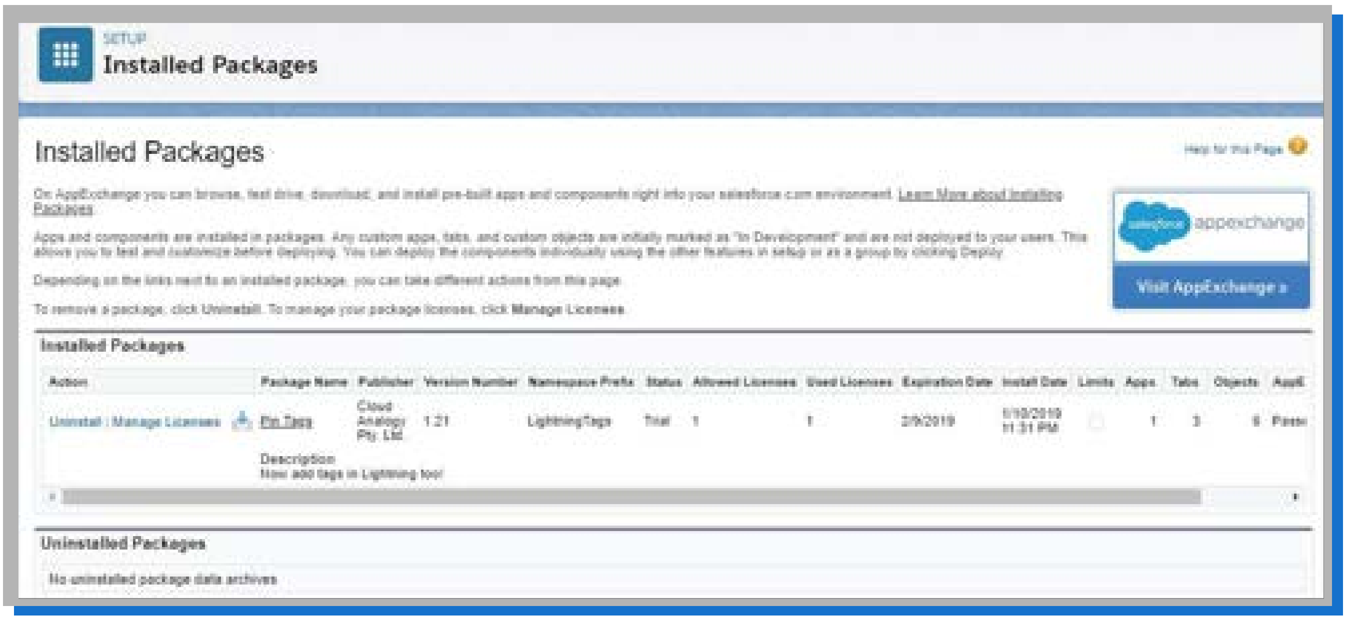
2. User Access:

- Once the app is installed, select the user profiles that should have access to PinTags and click on the Install button.

NOTE: Grant permissions based on the user roles in your organization.

3. Final Steps:

- After installation, you will receive a confirmation message.
- Click "Done" to complete the installation process. You are directed to the Installed Packages page below.



How to Set Up the App

Assign Licenses to Users

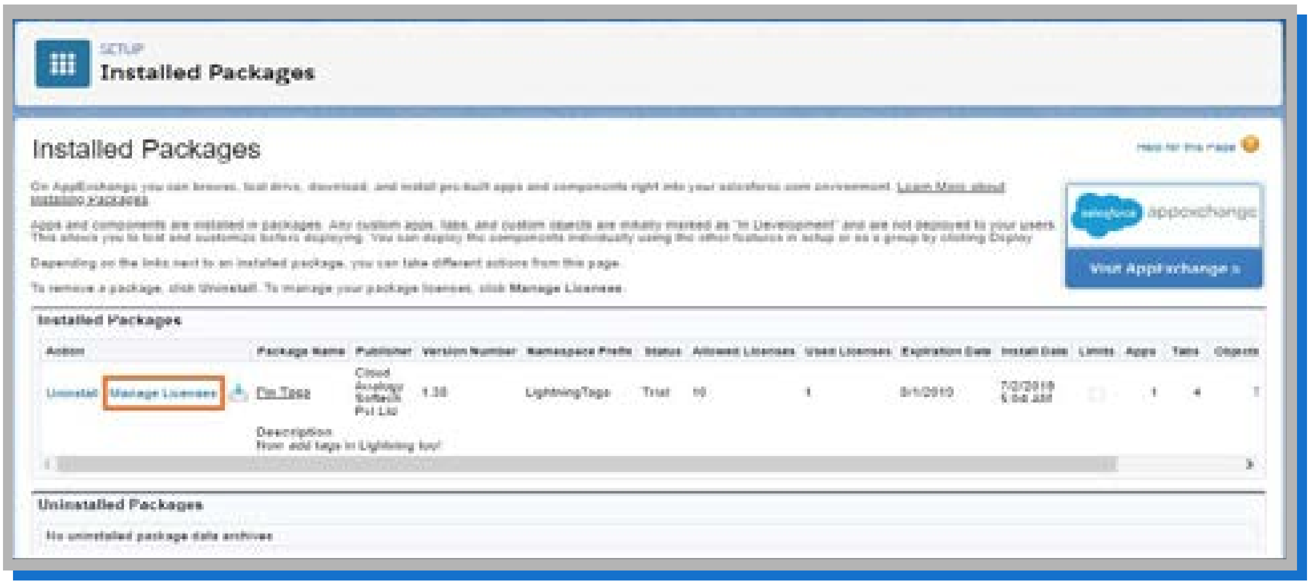
The app can be used by users (other than System Admin) if they have been assigned the app's license. Follow these steps to assign the app license to a user:

1. **Navigate to Setup:**

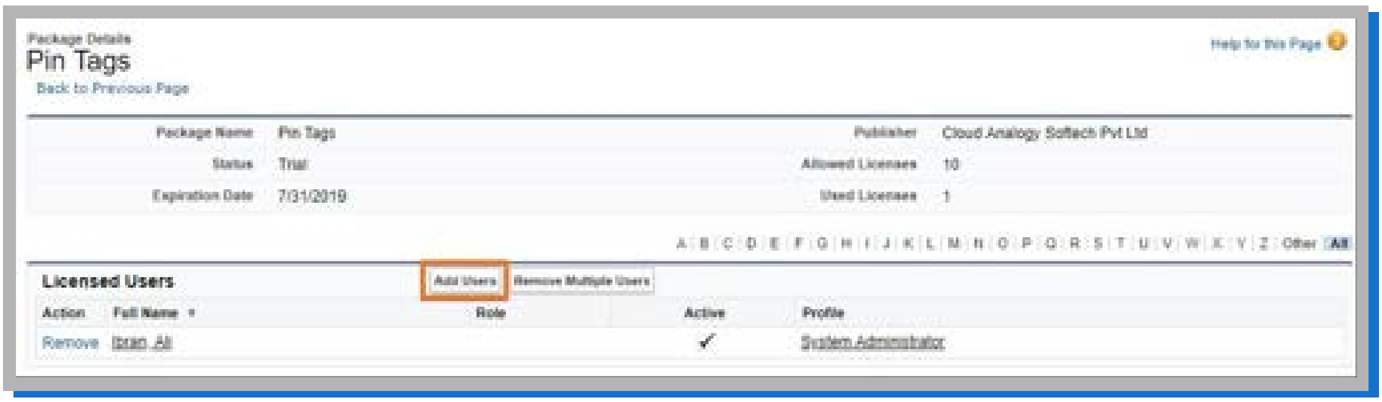
- Go to Salesforce Setup.
- Enter "Installed Packages" in the Quick Find box and select it.

2. **Manage Licenses:**

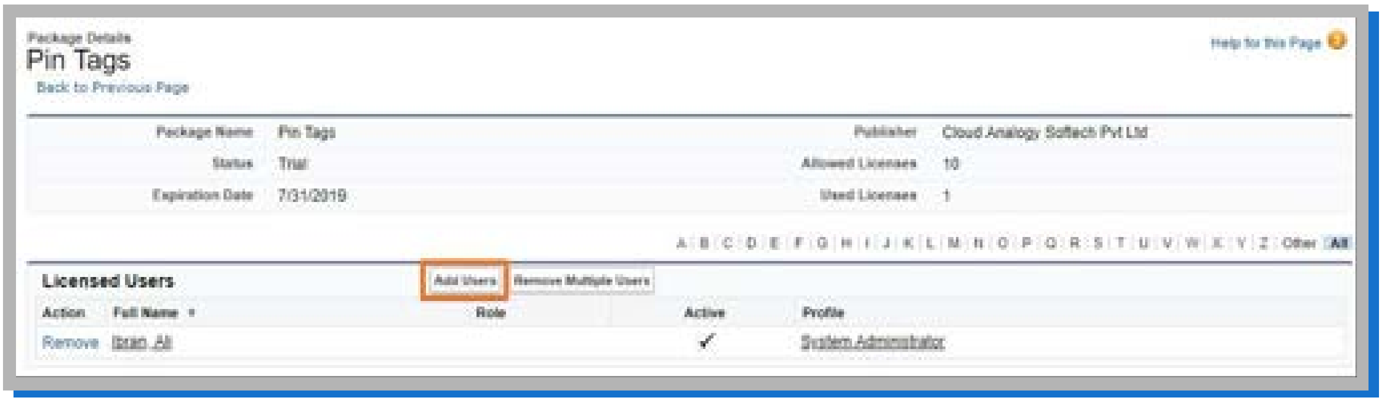
- Find the PinTags package.
- Click on "Manage Licenses" and assign licenses to the users who need access to the app.



- Click on “Add Users”.



- Select the user from “Available Users” and then click the “Add” button.

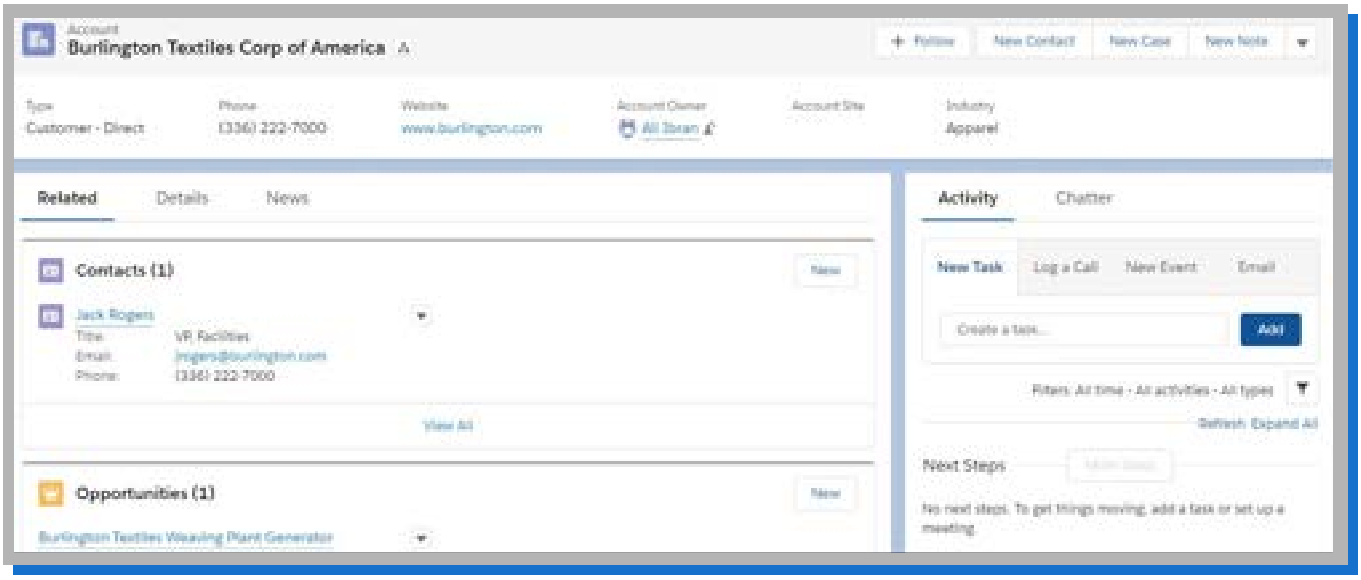


How to Add the PinTags Component to an Object Page

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

1. Open the Object Record:

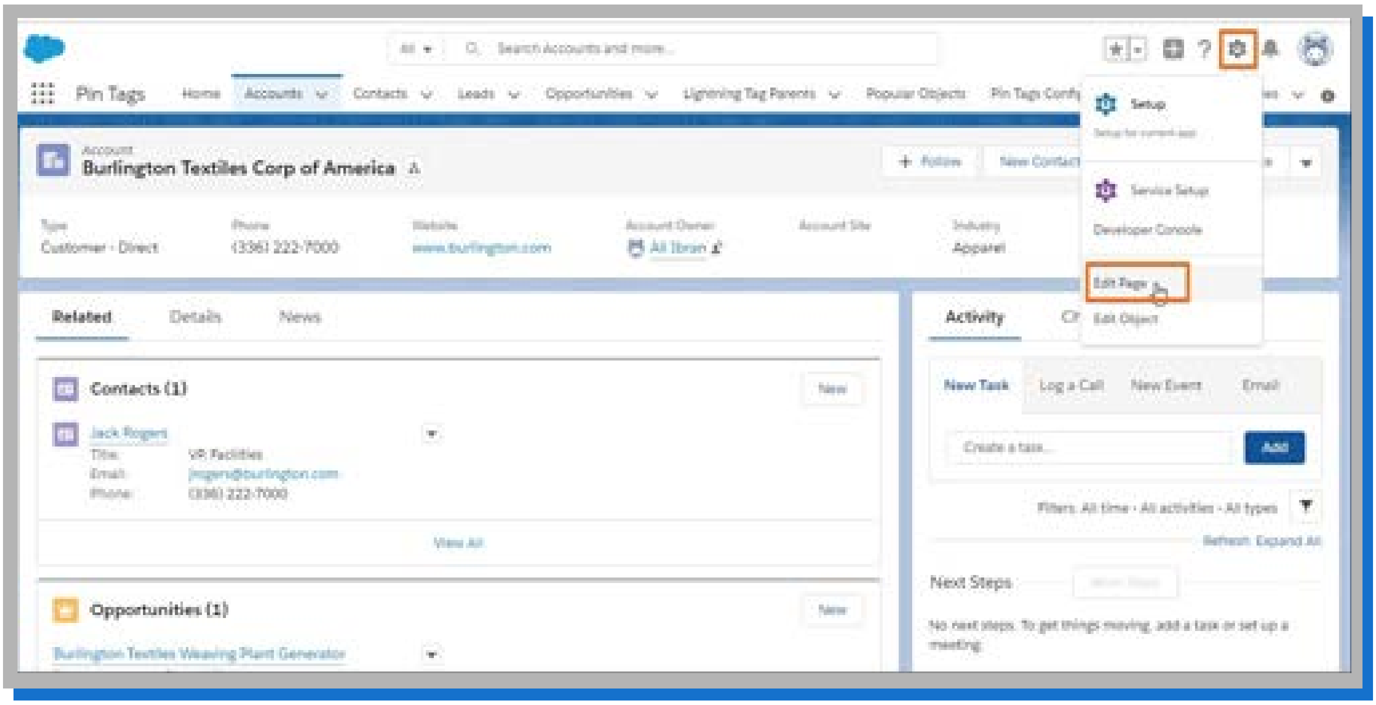
Navigate to the object's tab where you want to add the PinTags component. For example, if you want to add it to the Account object, go to the Account tab and open any Account record.



2. Edit the Page Layout:

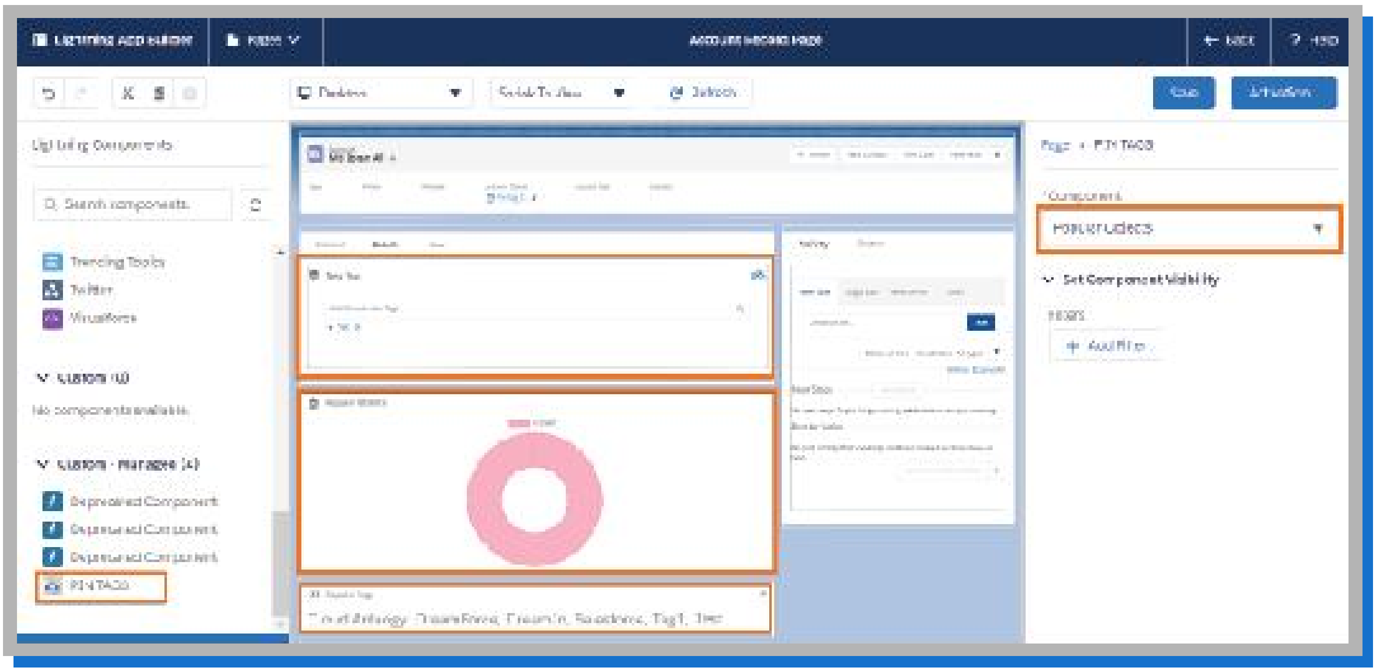
- Click the Setup icon (gear icon) in the upper right corner of your Salesforce screen.

- From the drop-down menu, select Edit Page.

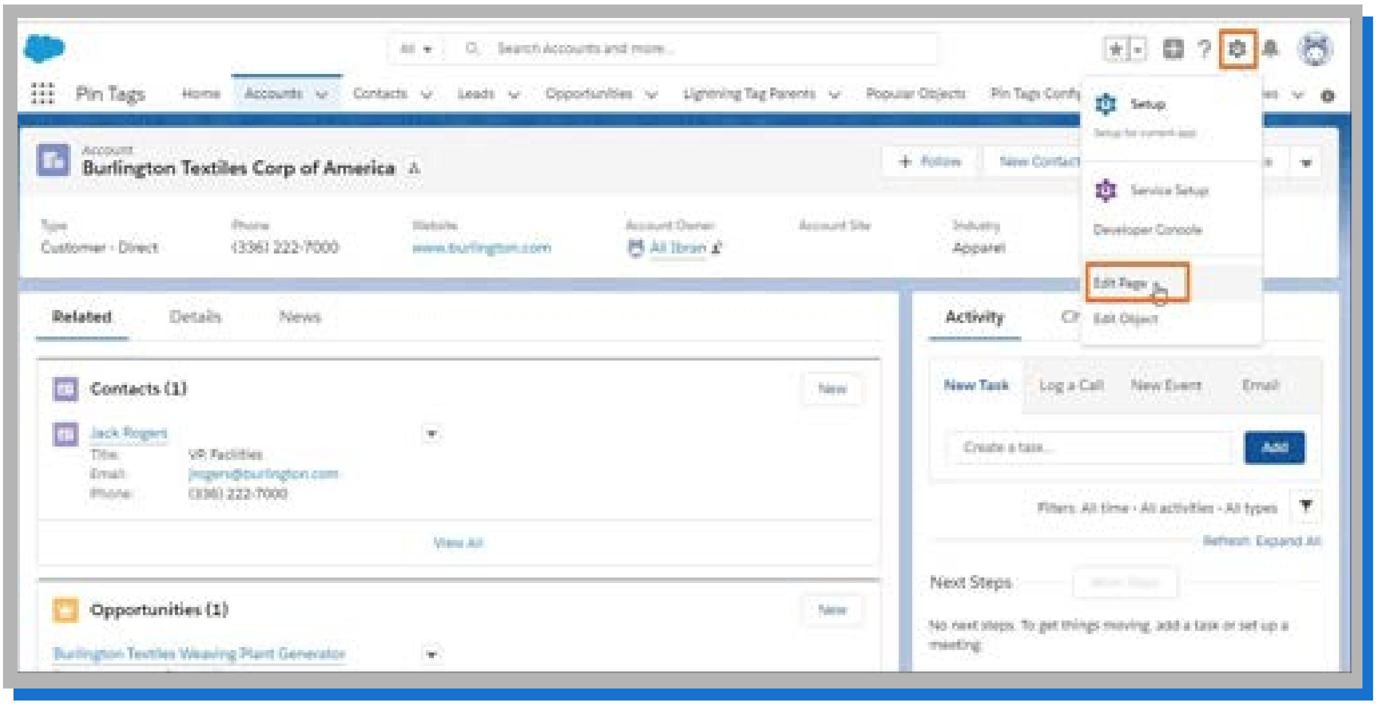


3. Add the PinTags Component:

- In the Page Layout editor, look for the PinTags component on the left menu.
- Drag the PinTags component and drop it onto the page where you want it to appear.
- From the right-side drop-down list, select PinTags to add it to the page.

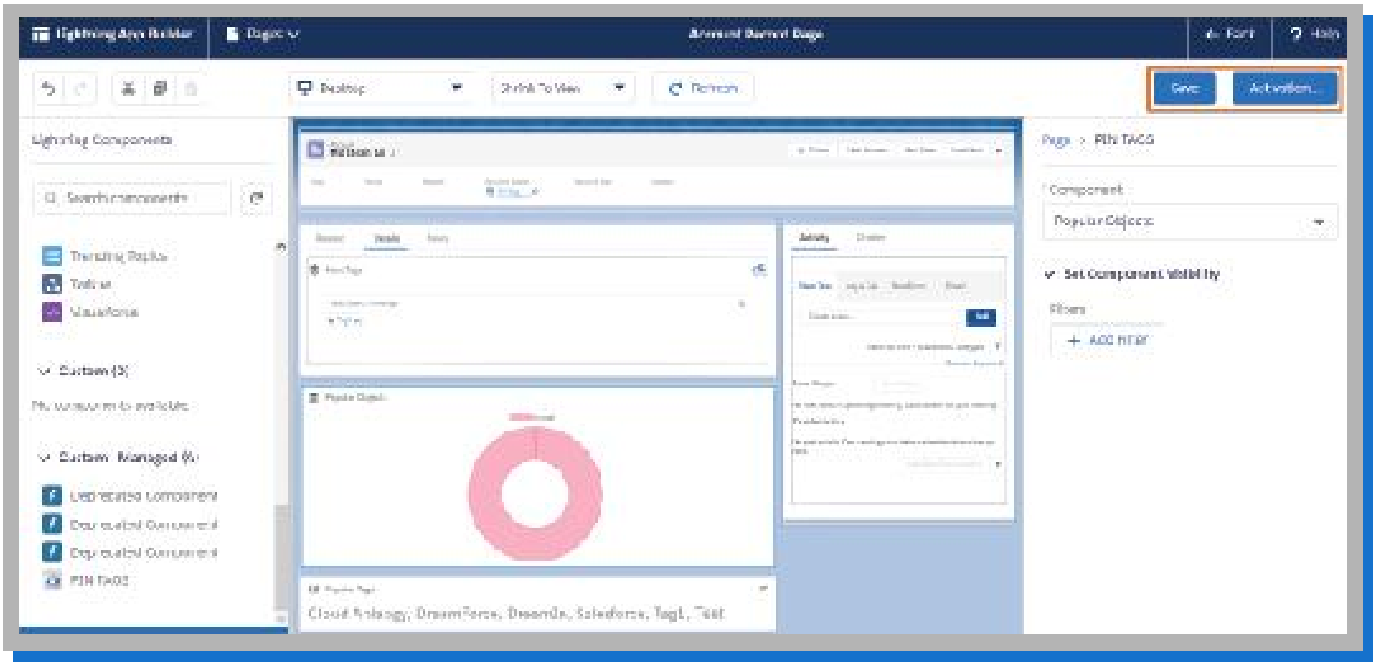


NOTE: If this is your first time installing PinTags, you may need to deploy your domain to access custom components. After deployment, add the PinTags component again and choose any additional components if needed.



3. Save & Activate:

- Click the Save button once you have added the PinTags component to the detail page.
- Then click the Activation button to make your changes live.



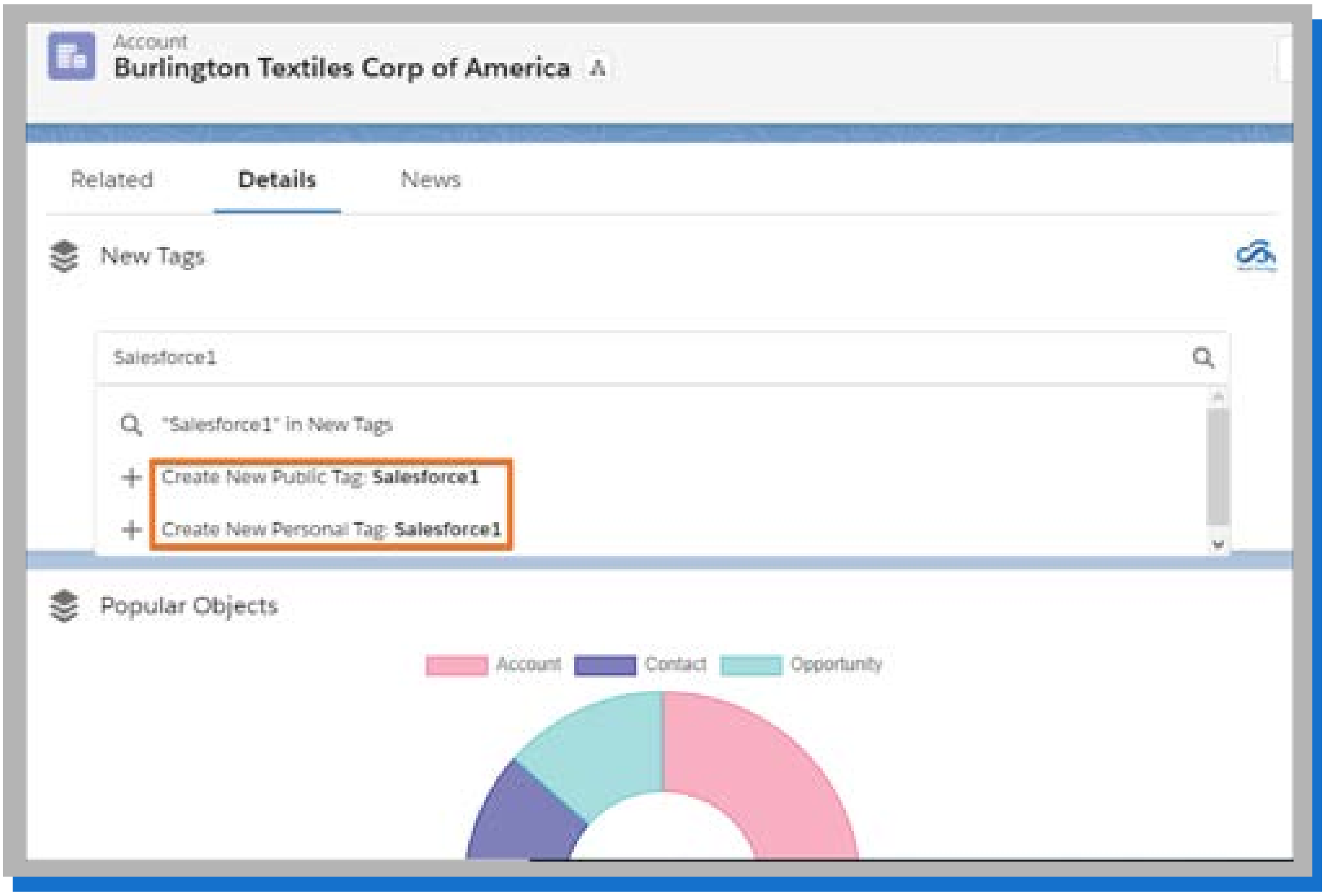
How to Use the App

Adding Tags to Record Details

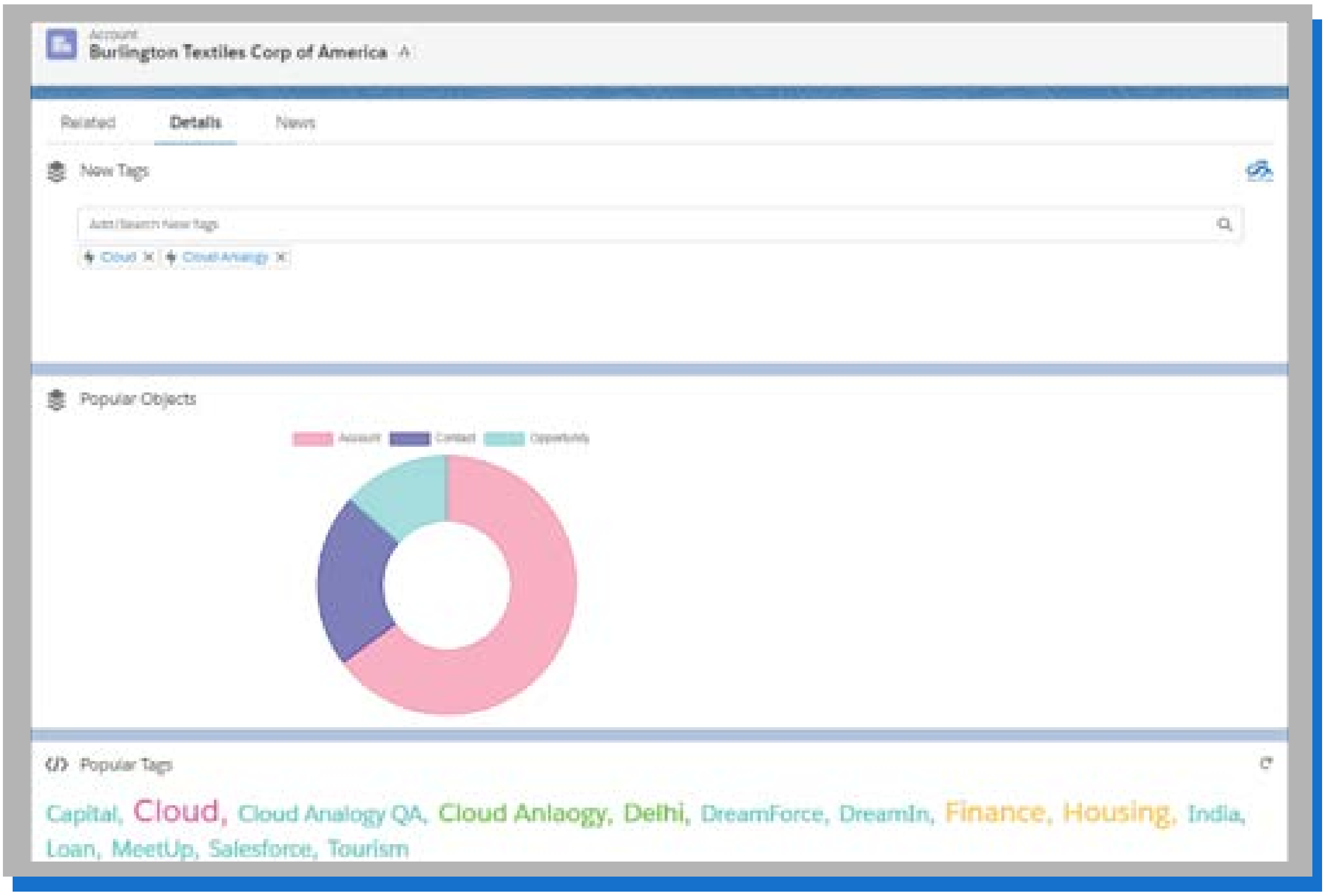
1. Type the Tag Name:
- Enter the tag name you want to create on the record detail page.

2. Create a Public Tag:
- Select "Create New Public Tag" to make the tag visible to all users.

3. Create a Personal Tag:
- Choose "Create New Personal Tag" to keep the tag private.



3. Refresh Popular Tags:
- Refresh the popular tags list to see your new tag in the results.



Repeat the above steps to add the component to other Standard or Custom Objects. You can also use this component in tasks and events.

Pin Tags Configurations

PinTags offers a range of features to help you manage and utilize tags efficiently and effectively. To access these features, navigate to the PinTags Configurations tab.

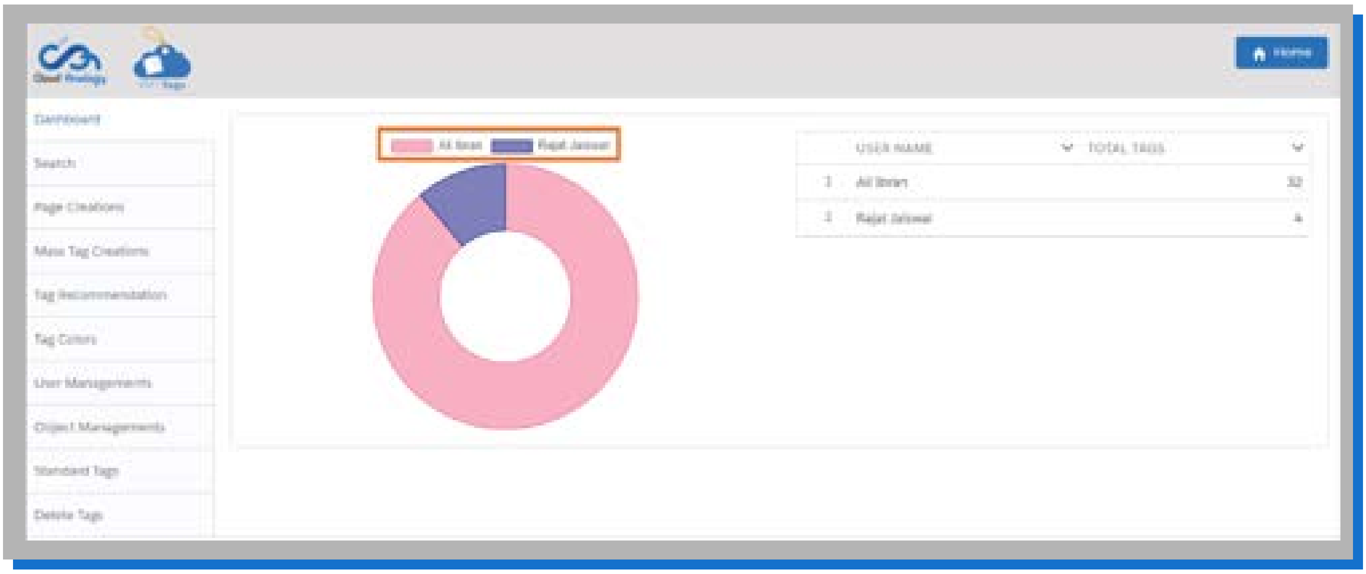
Here's an overview of the 13 different sub-tabs available under PinTags Configuration:

1. **Dashboard Overview: The dashboard is always open as the default tab**

Purpose: Provides a visual representation of tags created, active users, popular objects, and other relevant statistics.

Steps To Access the 'Dashboard Tab' within PinTags:

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



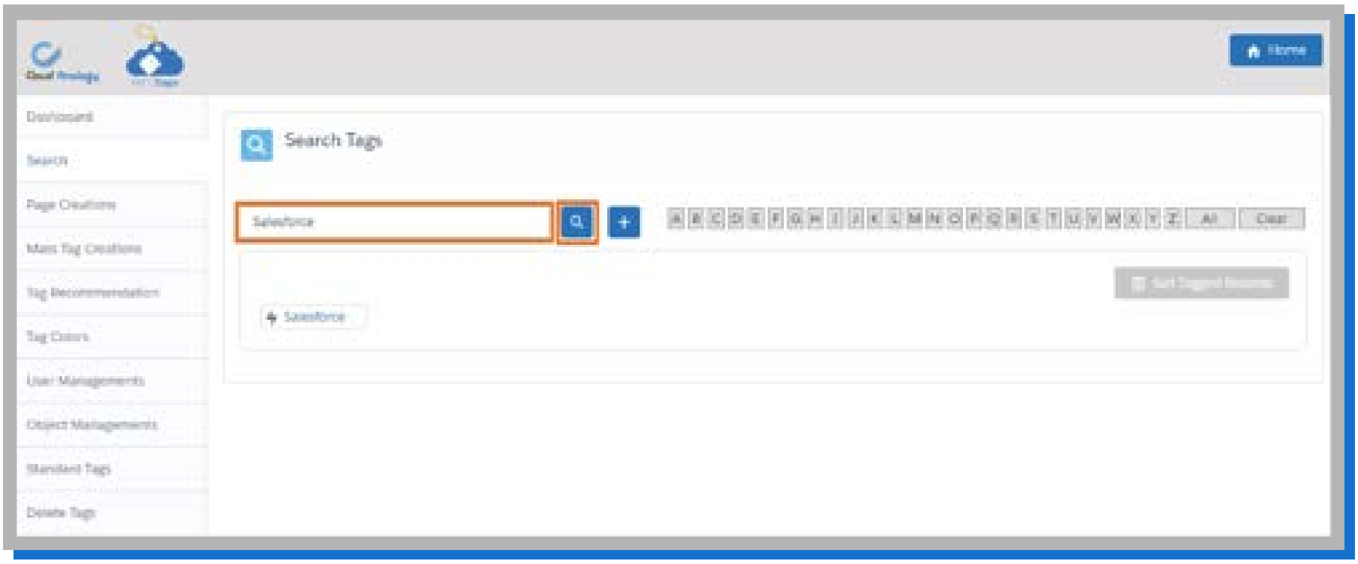
You can also see the number of Tags used by each user by hovering the cursor on the chart.

2. Tag Search

Purpose: Allows users to search for specific tags across all objects.

Steps To Follow:

- Utilize the search tags tab by entering a tag's name or starting letter to find it.

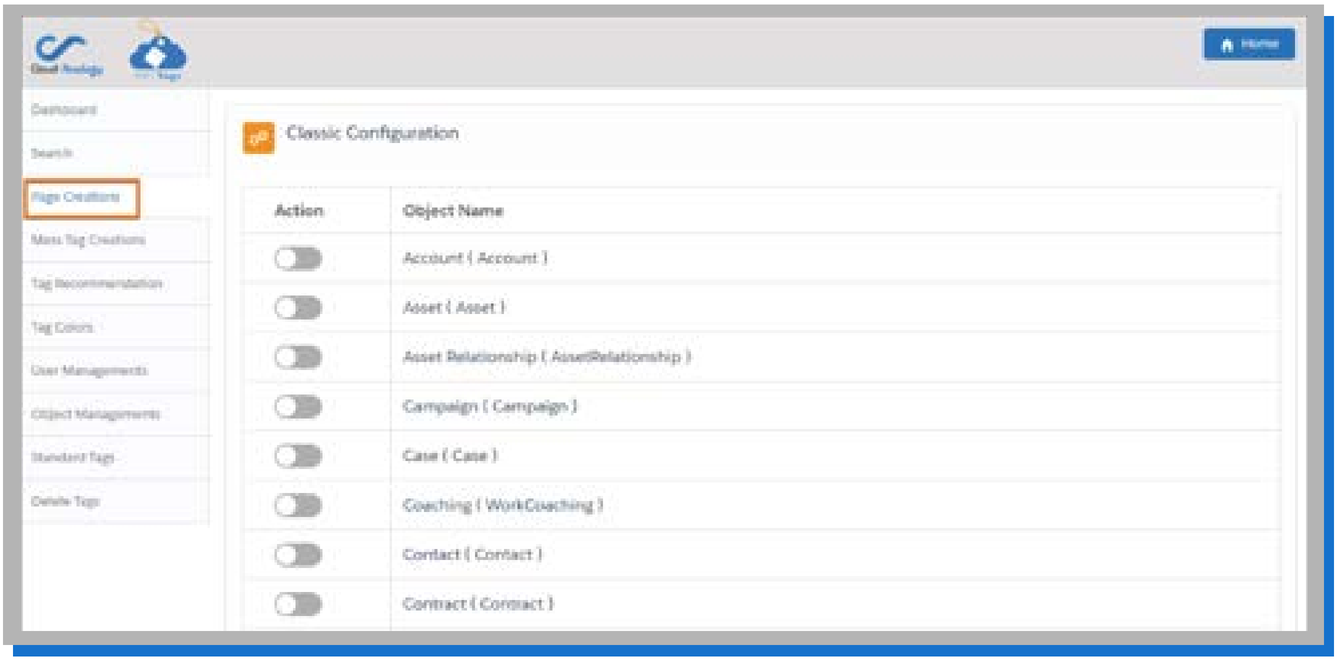


- Click On Tag and then the "Get Tagged Records" Button to get the list of the records to which the tag is added. (e.g., Contacts, Accounts, Leads)

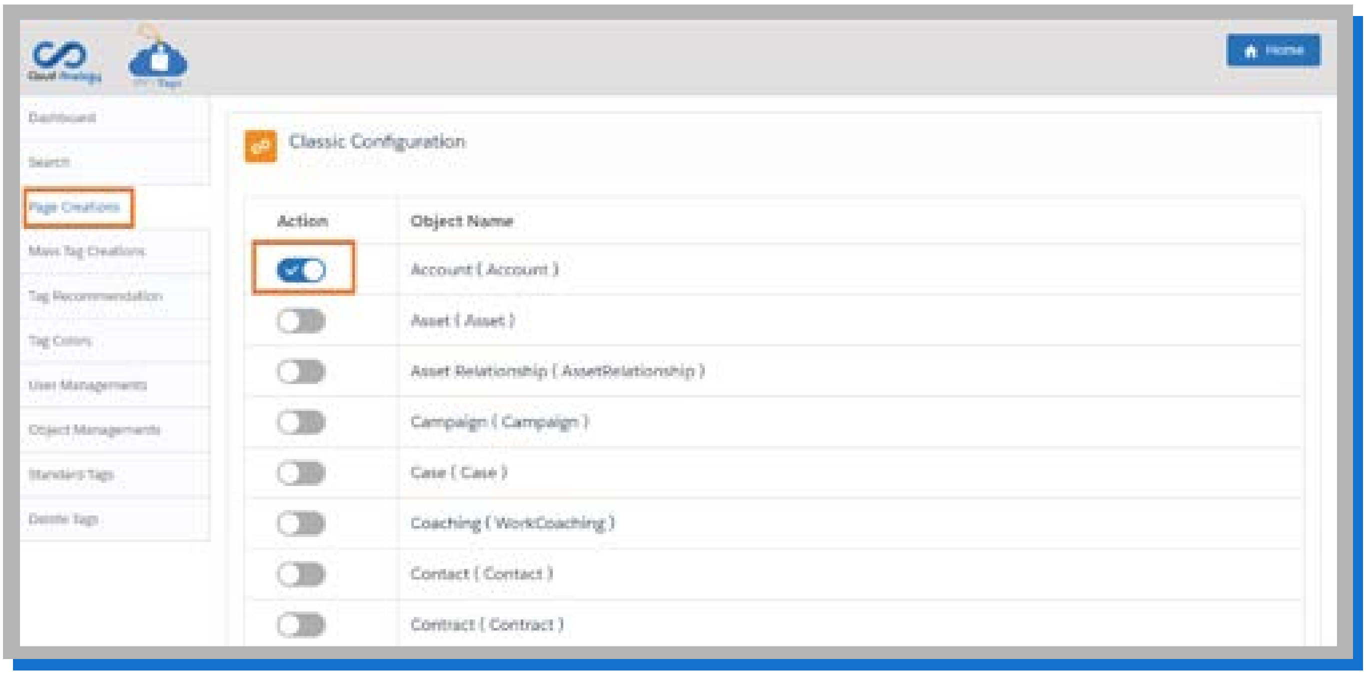
- Search for another Tag by clicking on the “+” icon.

3. Page Creation (Applicable For Salesforce Classic)

- Click on the “Page Creations” tab.

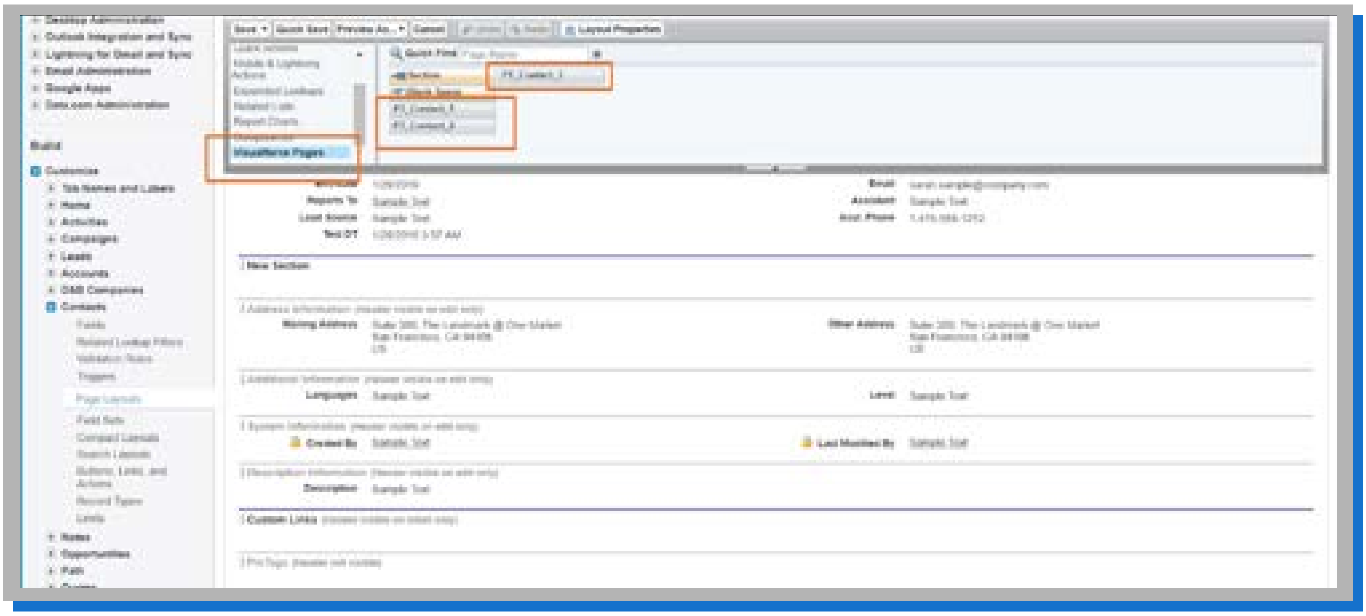


- Enable the action toggle button for the objects for which you want to add tags.



- Now open any record of that object in which you want to add tags and which was configured in the classic configuration step. Now click on "Edit Layout".

- Click on the visualforce pages section, and if you want, create a new section for pin tag and add the pages to it.



- Then click on Save.

Add tags to Record Details.

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

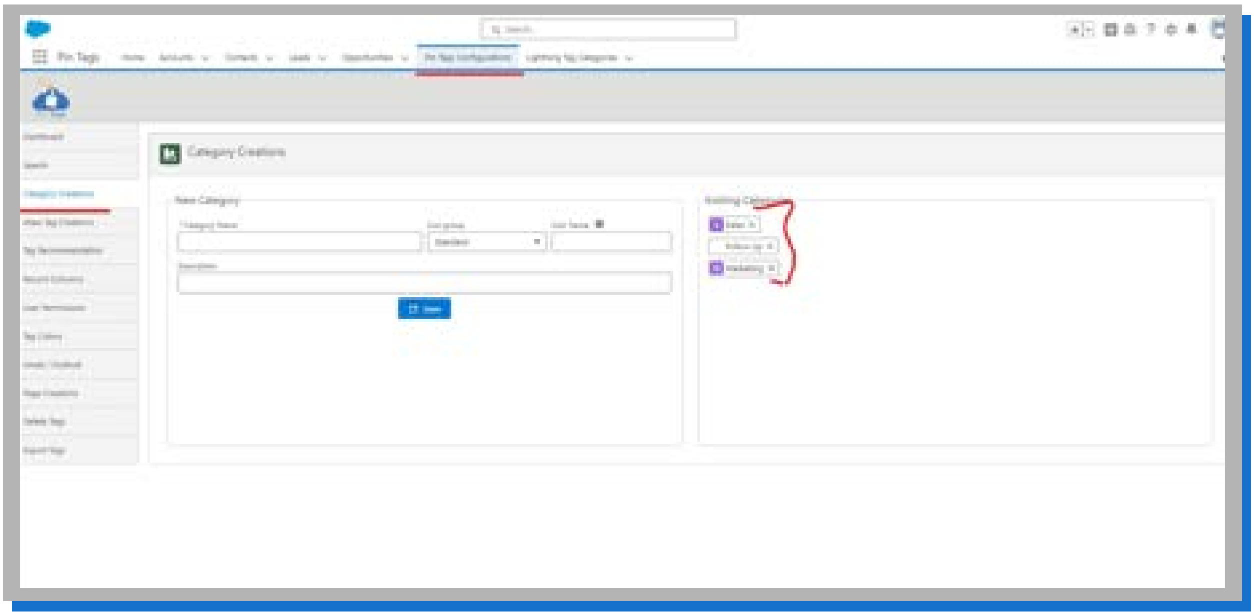
- Type the Name of the tag you want to create.
- Select “Create New Public Tag” on the record page.
- Select “Create New Personal Tag” on the record page.

4. Category Creation

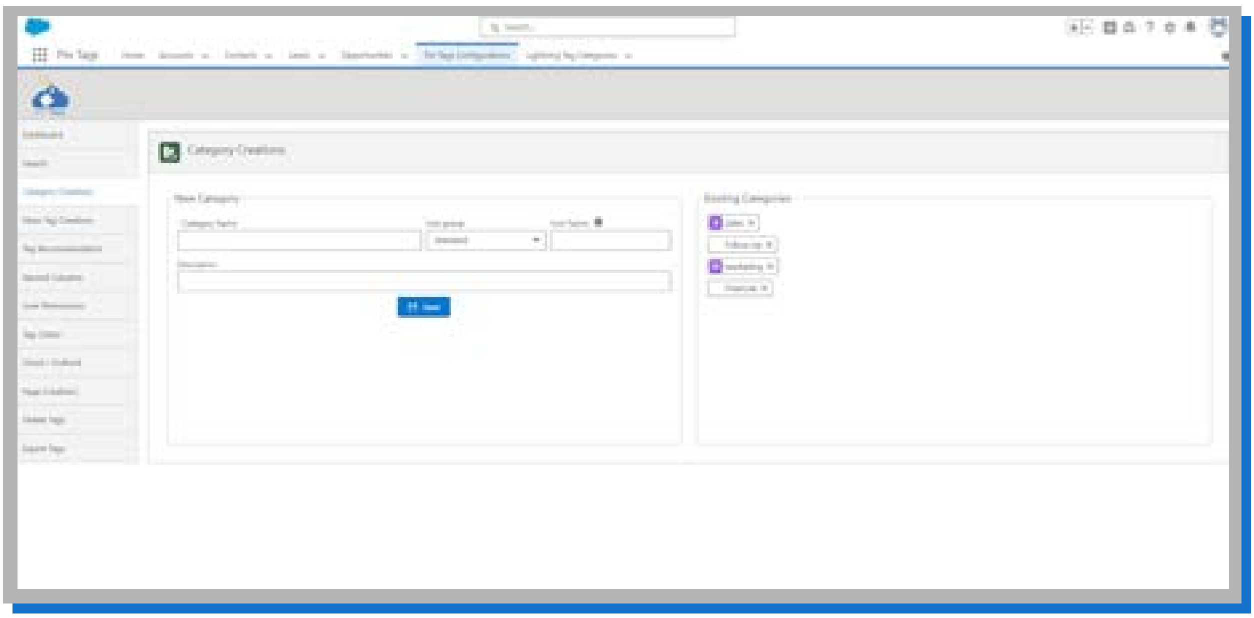
Purpose: Organize tags into categories for better management and easily filter and view related tags in bulk.

- Go to PinTags Configurations & select the Category Creation option.

NOTE: Predefined categories are displayed here. Currently, we have three predefined categories: Sales, Follow Up, & Marketing



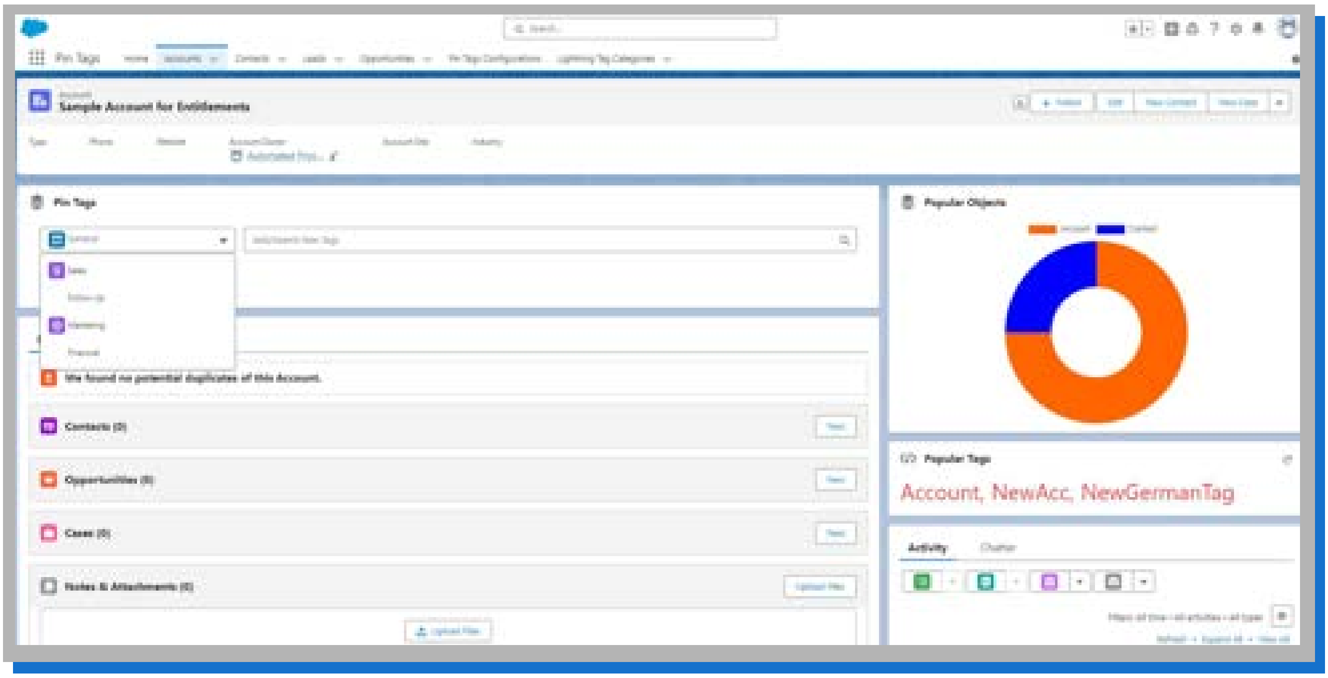
- Create New Categories: To create a new category, fill in the required details: **Category Name, Icon Group, Icon Name,** and **Description and click on the save button.**



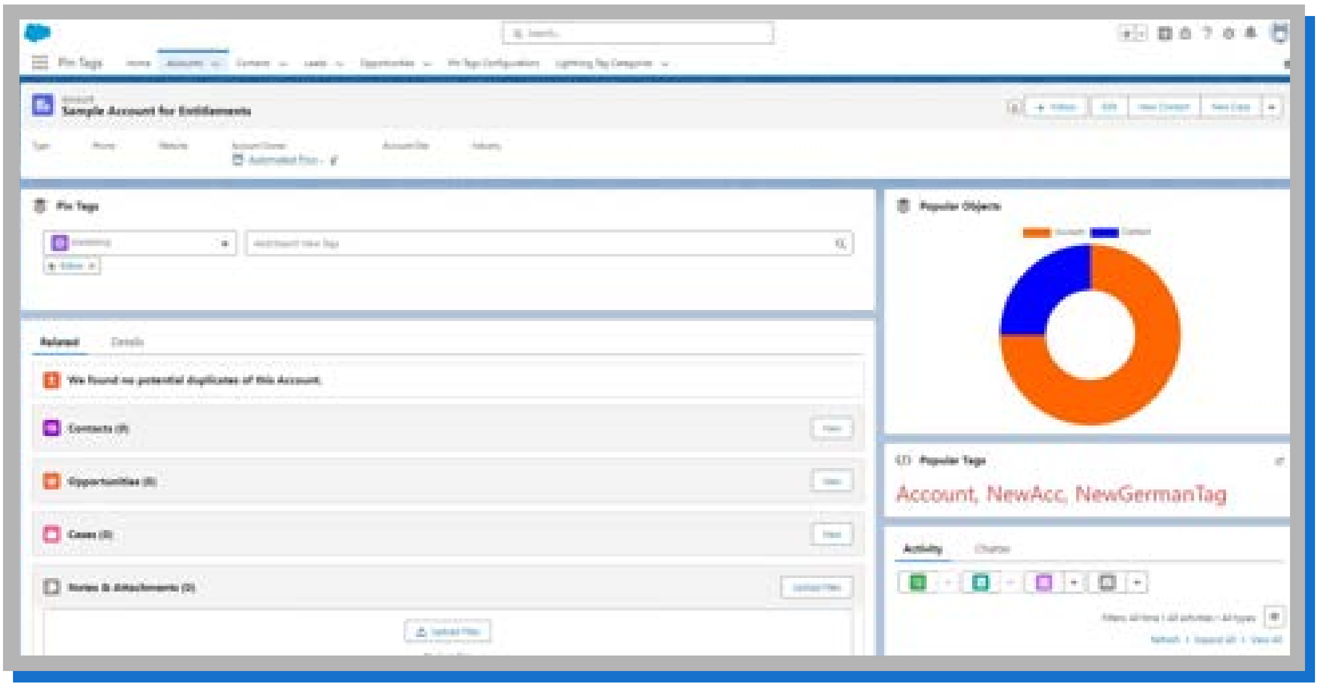
- Ensure each category name is unique to avoid duplication.

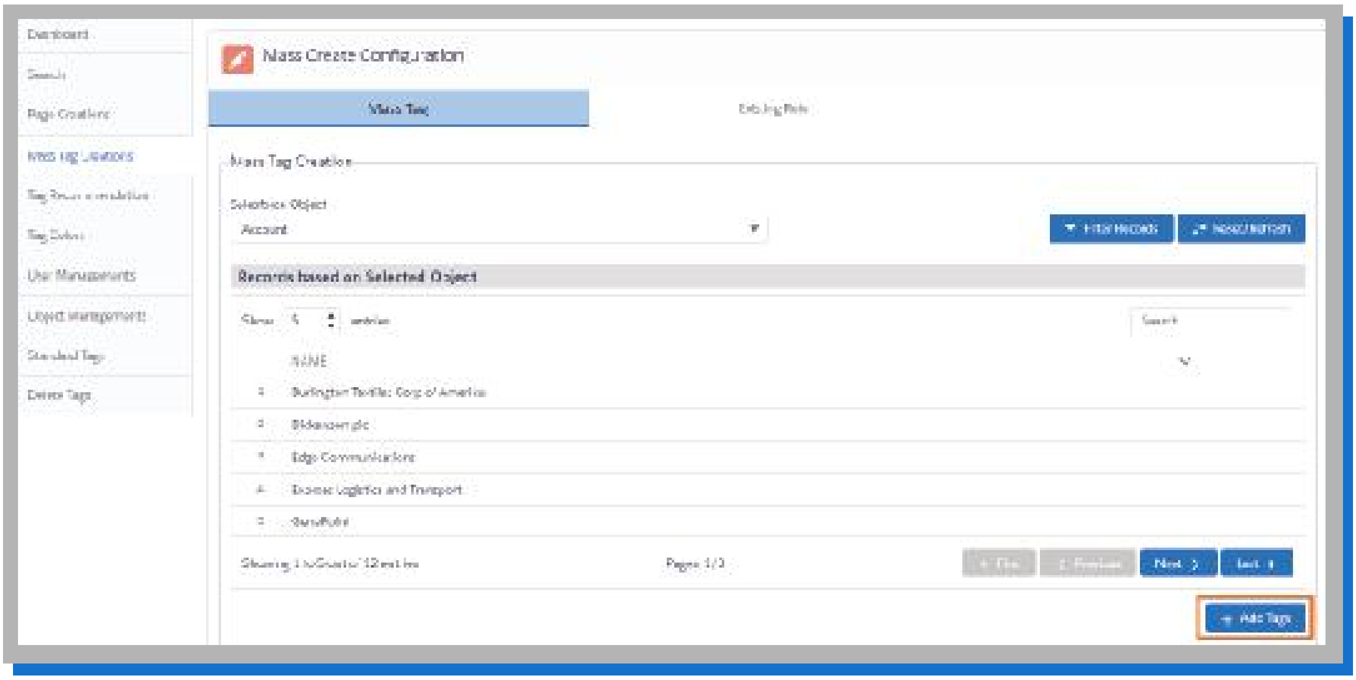
How to Use Categories:

- By default, the category is set to "General" for existing customers.
- To categorize tags, create categories by following the steps above.
- Go to Accounts to view all newly added categories.

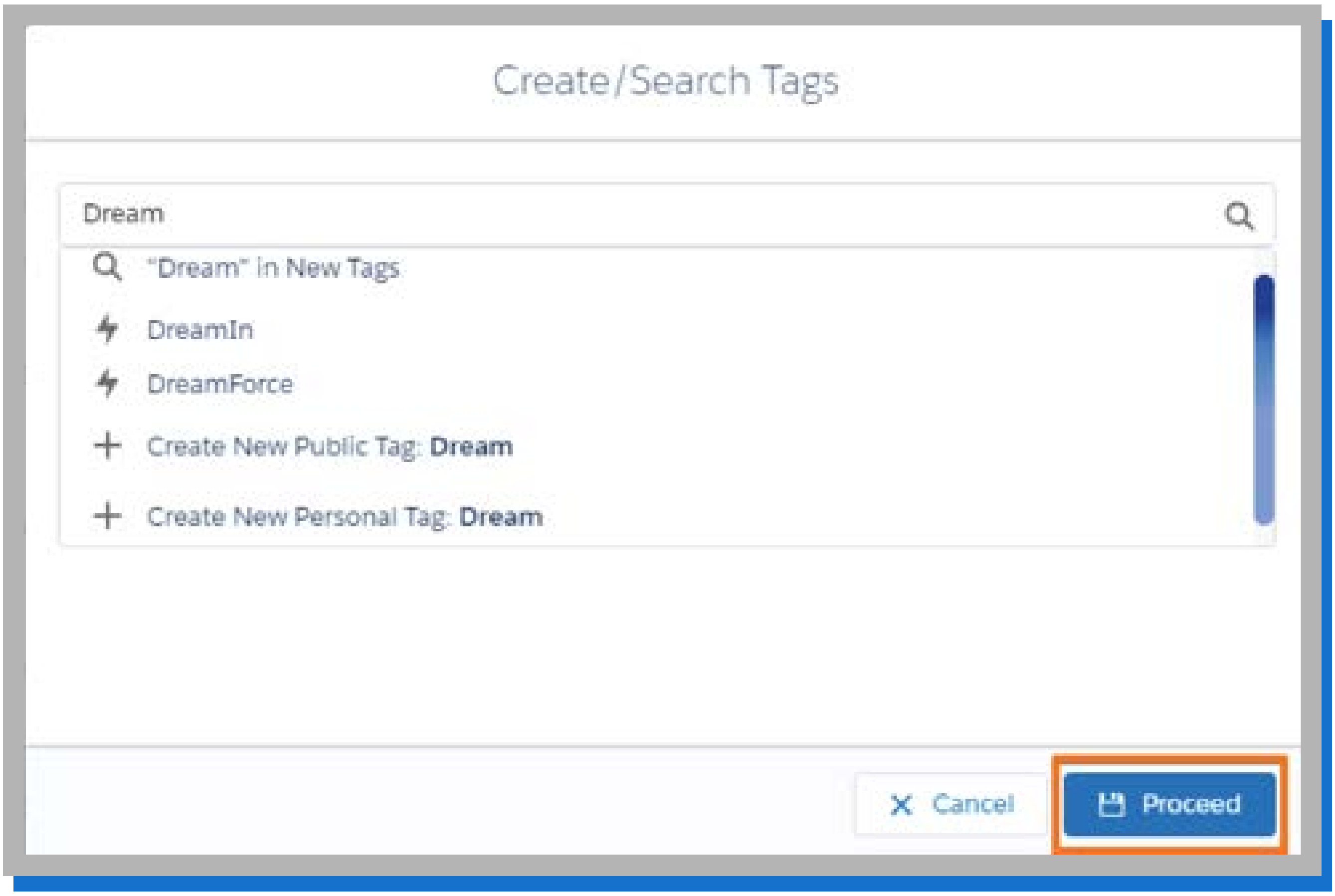


- Click on a category (e.g., Marketing) to see the tags associated with that category.





- After that, click “Create/Search Tags” and the “Proceed” button.



- You can also use the “Filter Records” option to apply filters based on particular criteria to narrow down the records.

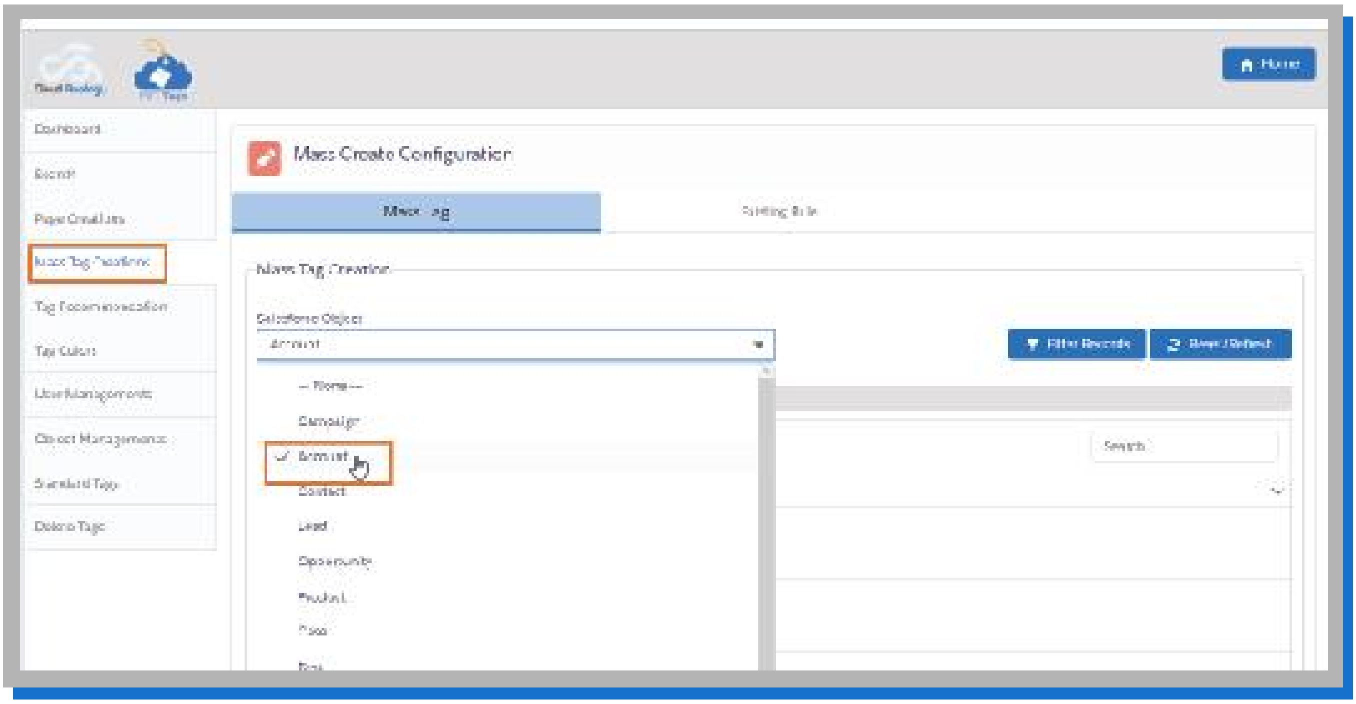
This feature allows you to manage and organize tags effectively, making it easier to sort and filter records based on specific categories.

5. Mass Tag Creation

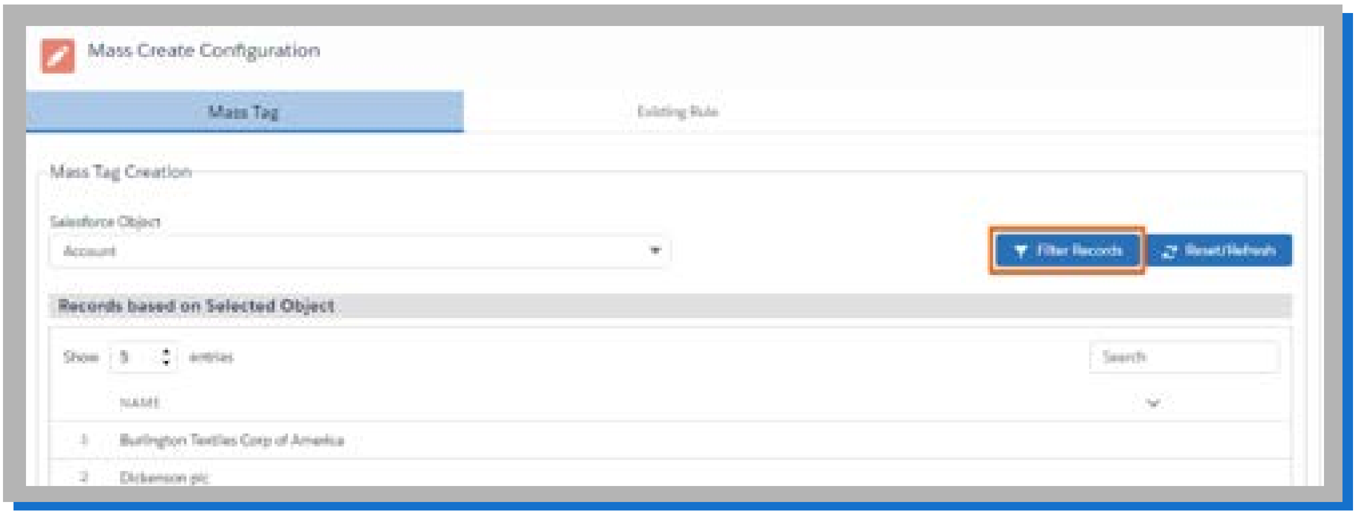
Purpose: Allows you to mass create tags across multiple records simultaneously based on specific criteria.

Steps To Follow:

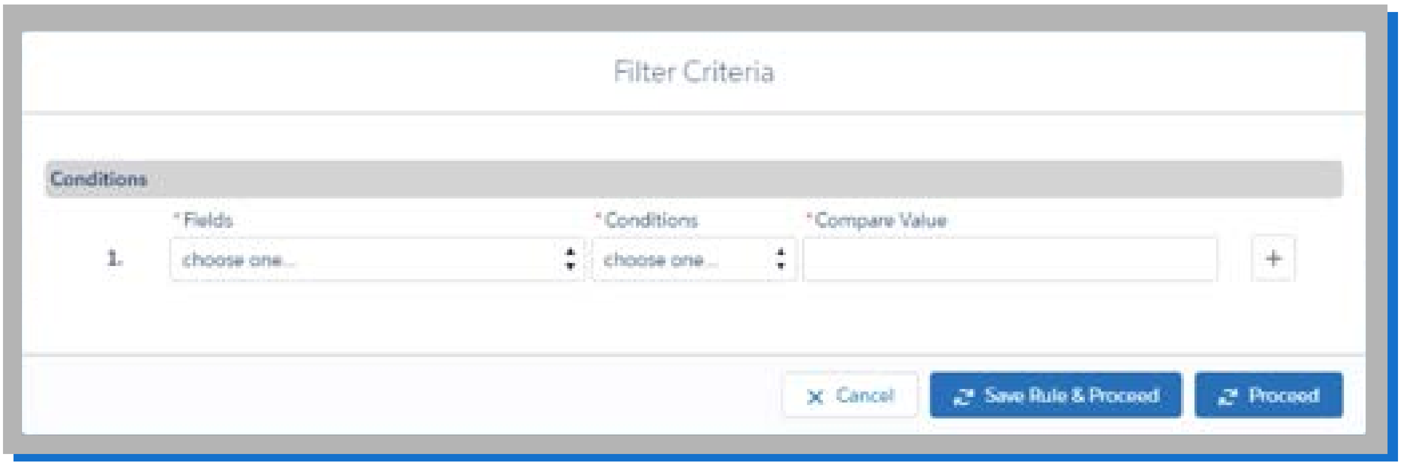
- Access the PinTags configuration panel.
- Select any object from the “Salesforce Object” drop-down list you wish to mass tag.



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



- Select the value of “Field,” “Operator,” and enter “Compare Value” (e.g., Annual Revenue > 15k) and then click on the “Proceed” button.

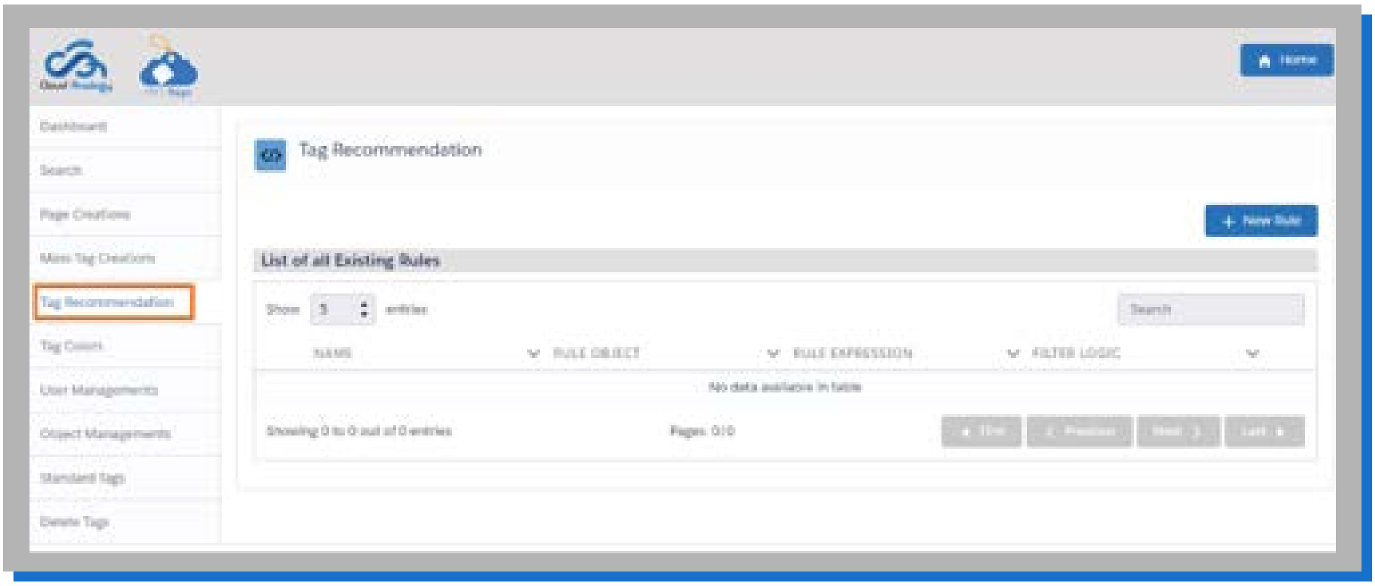


6. Tag Recommendation

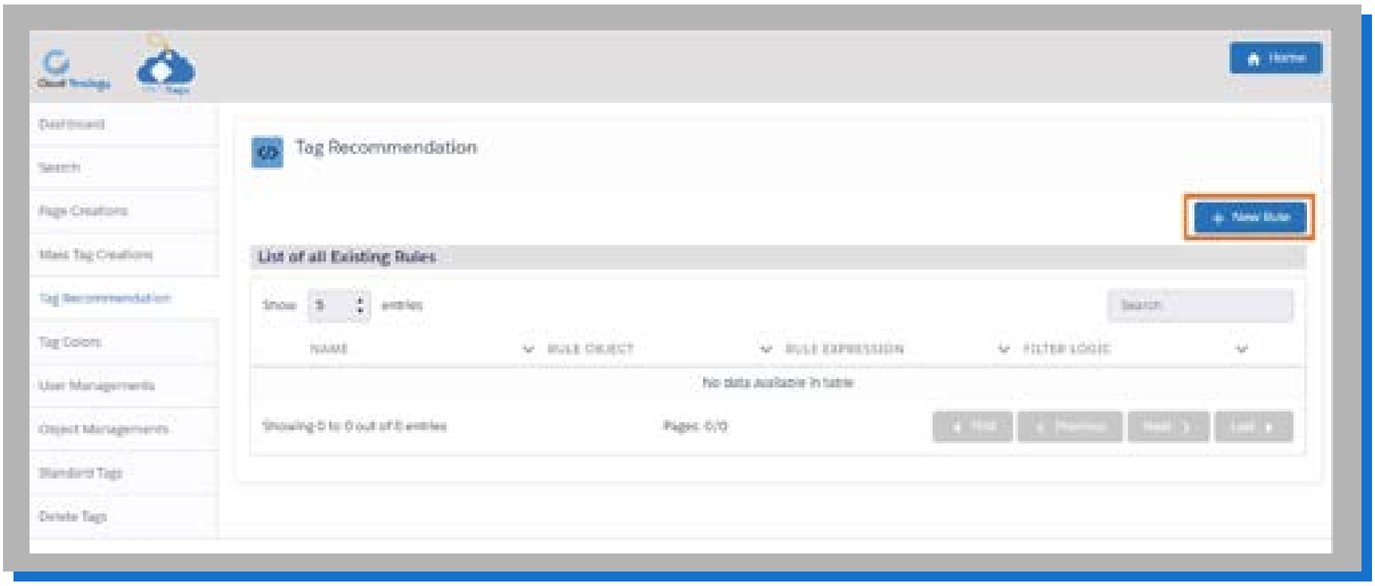
Purpose: Allows you to create automated rules, and based on these rules, you can recommend tags at the record level.

Create a Rule: Define rules for automatic tag recommendations.

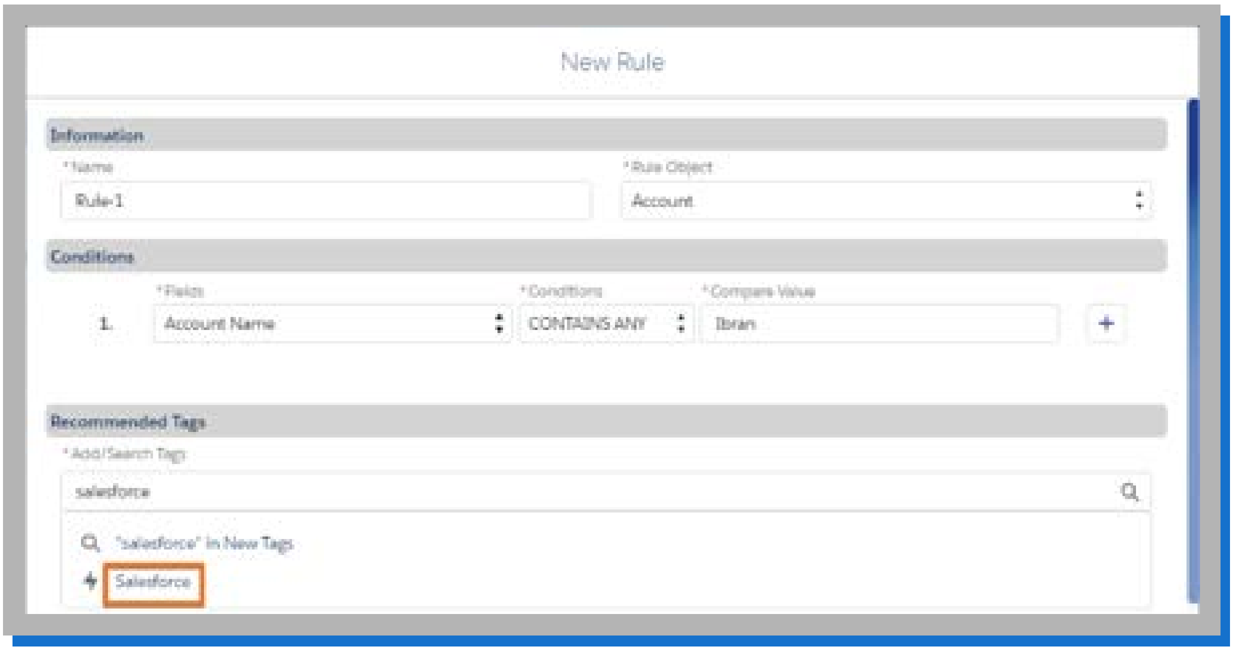
- Go to "Tag Recommendations" under PinTags Configuration.



- Click "New Rule."



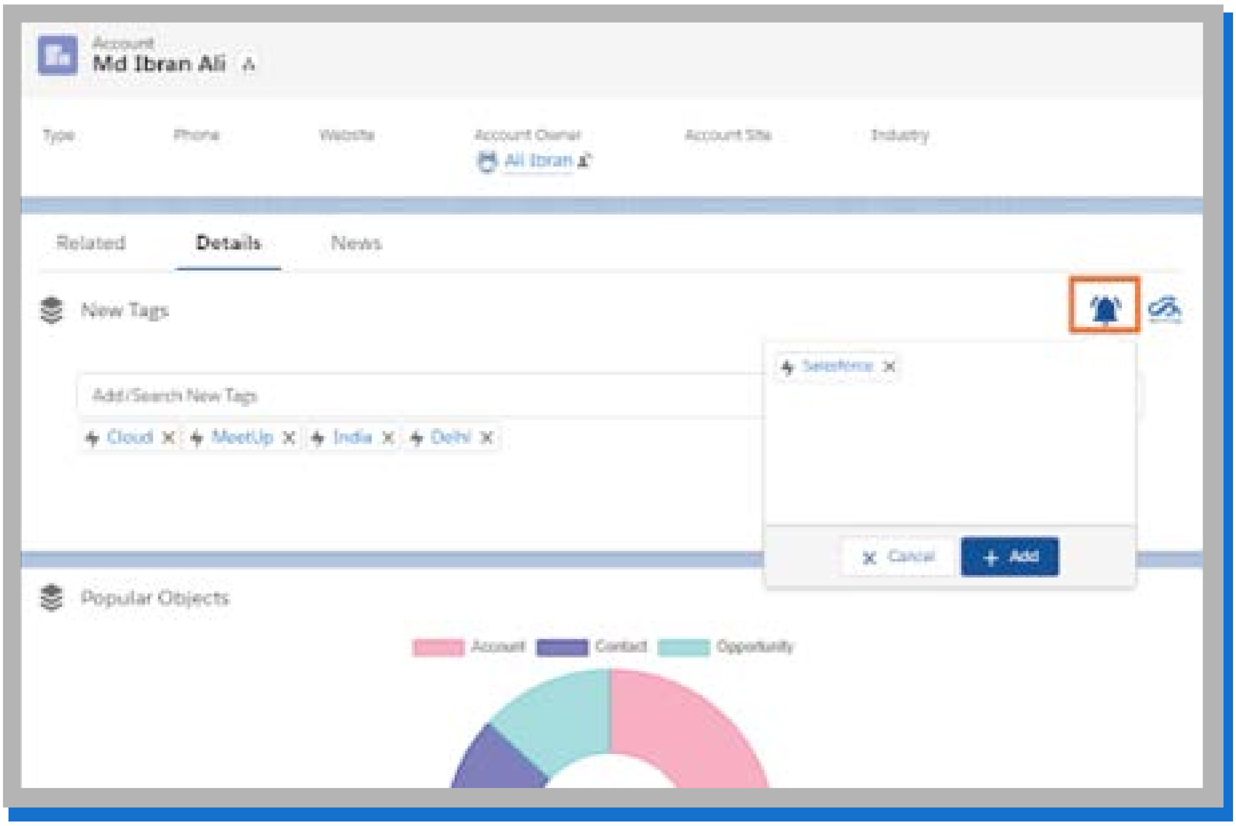
- Fill in the details and set conditions (e.g., Account Rating = Hot).



- Define the tag that should be recommended based on the condition.
- Save and activate the rule. The system will now recommend tags based on the rule whenever the conditions are met.

Steps To View Recommendations:

- A bell icon will appear on records that meet the rule's criteria.
- Click the bell icon to access the recommended tags.

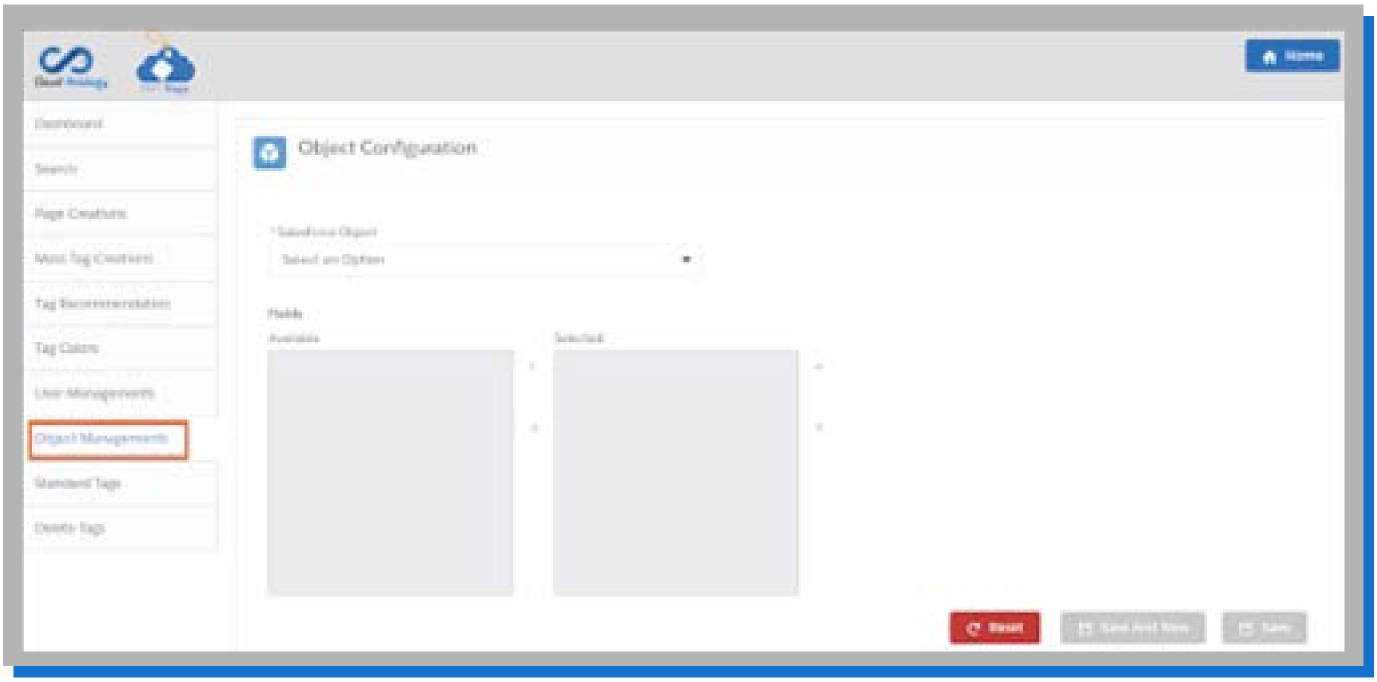


- Add the recommended tags to records directly from the recommendation pane.

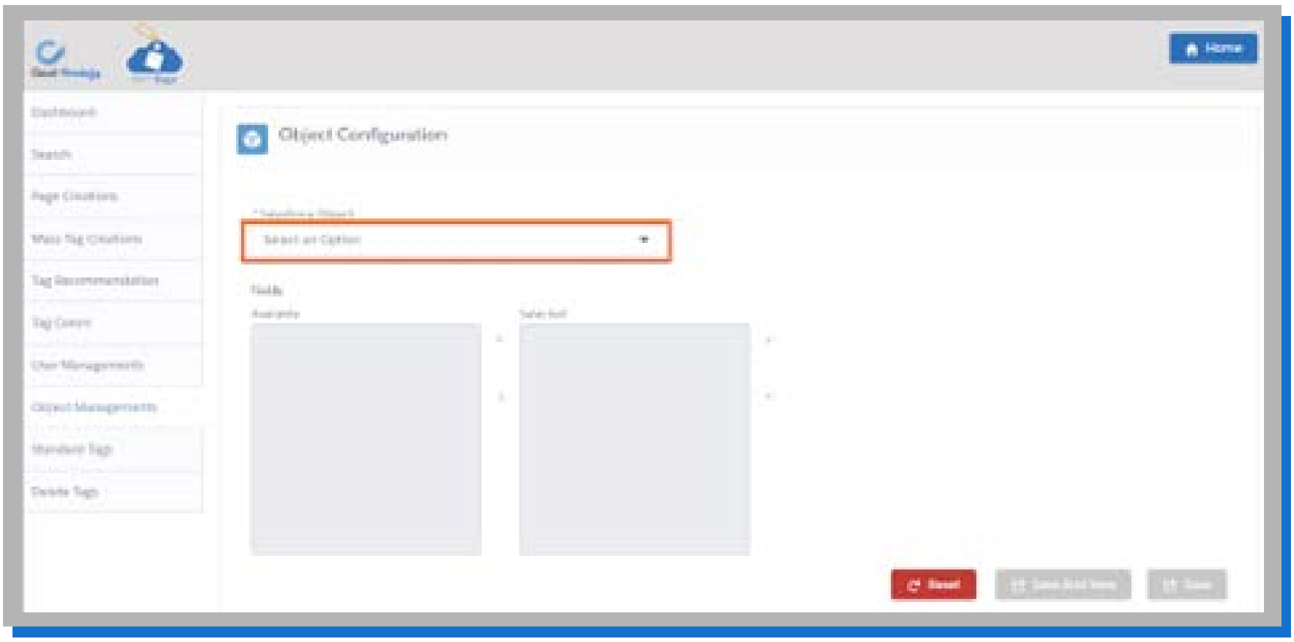
7. Object Management

Purpose: Control the visibility and display fields for each object on the Tab Detail Page.

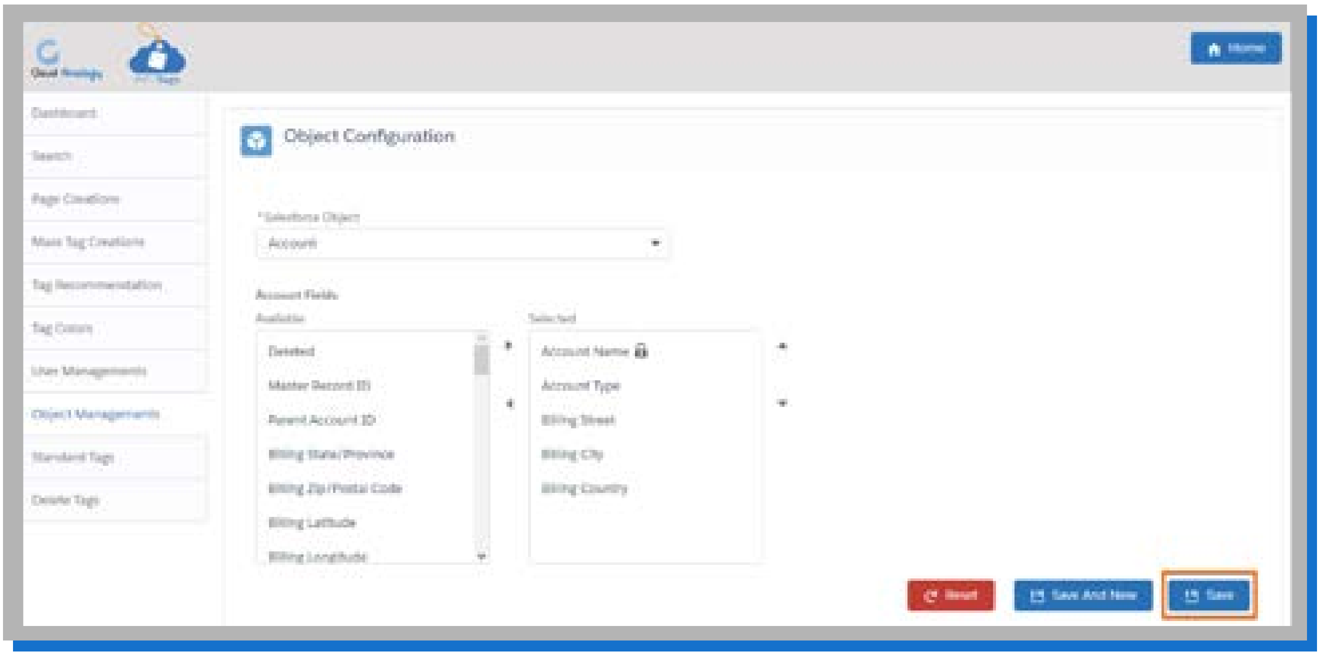
- Click on “Object Management”.



- Select the object from the drop-down list to configure tag details (e.g., Accounts, Contacts).

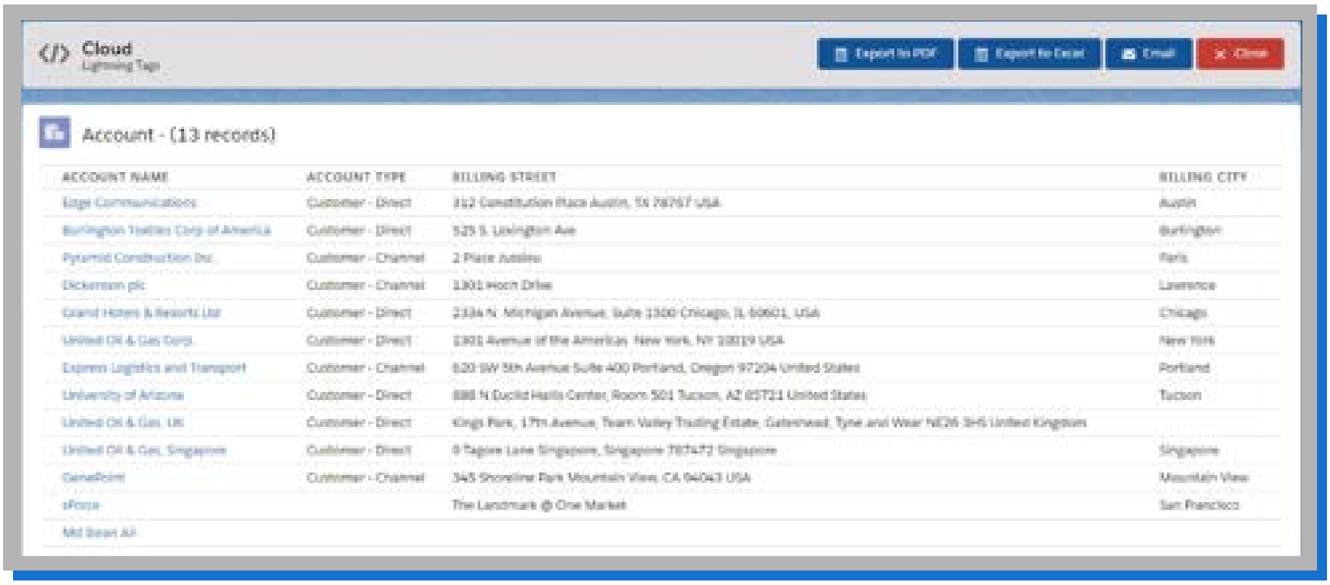


- Insert the fields from Available to Selected, then click the Save button.



If you want to "Save" more object fields, click "Save and New."button. If you want to reset the changes, click "Reset."

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



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.

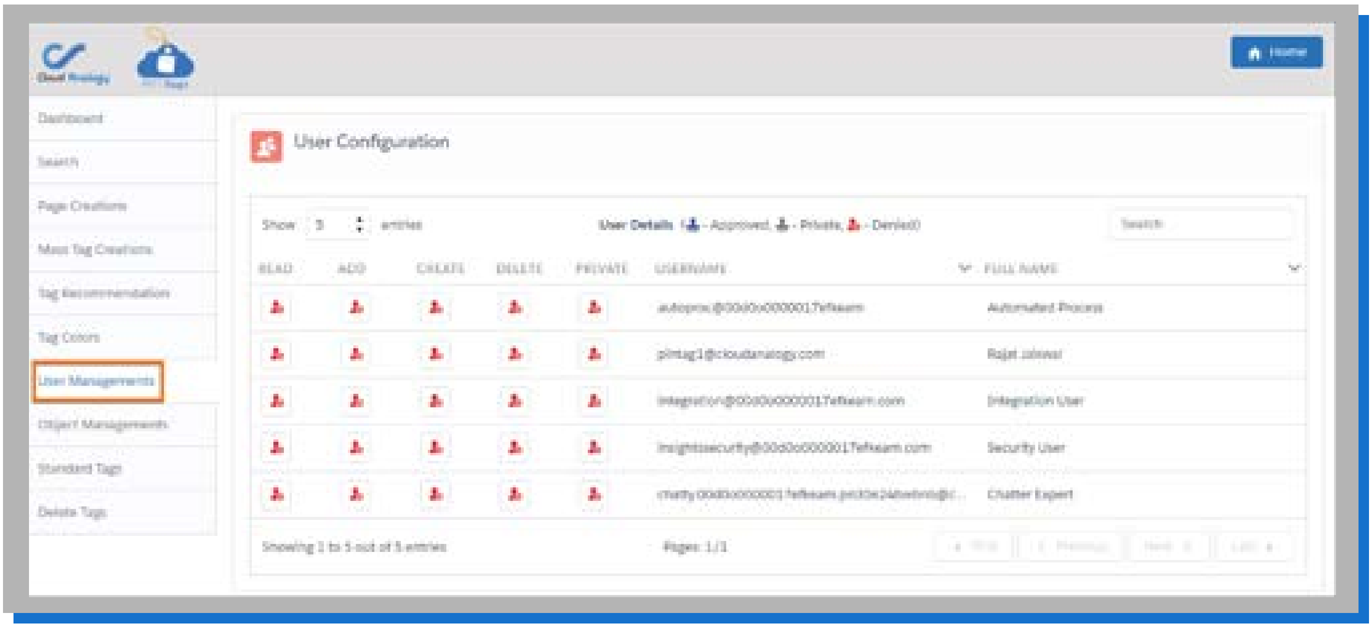
8. User Configuration

Purpose: Control what actions users can perform with PinTags. There are five types of permissions:

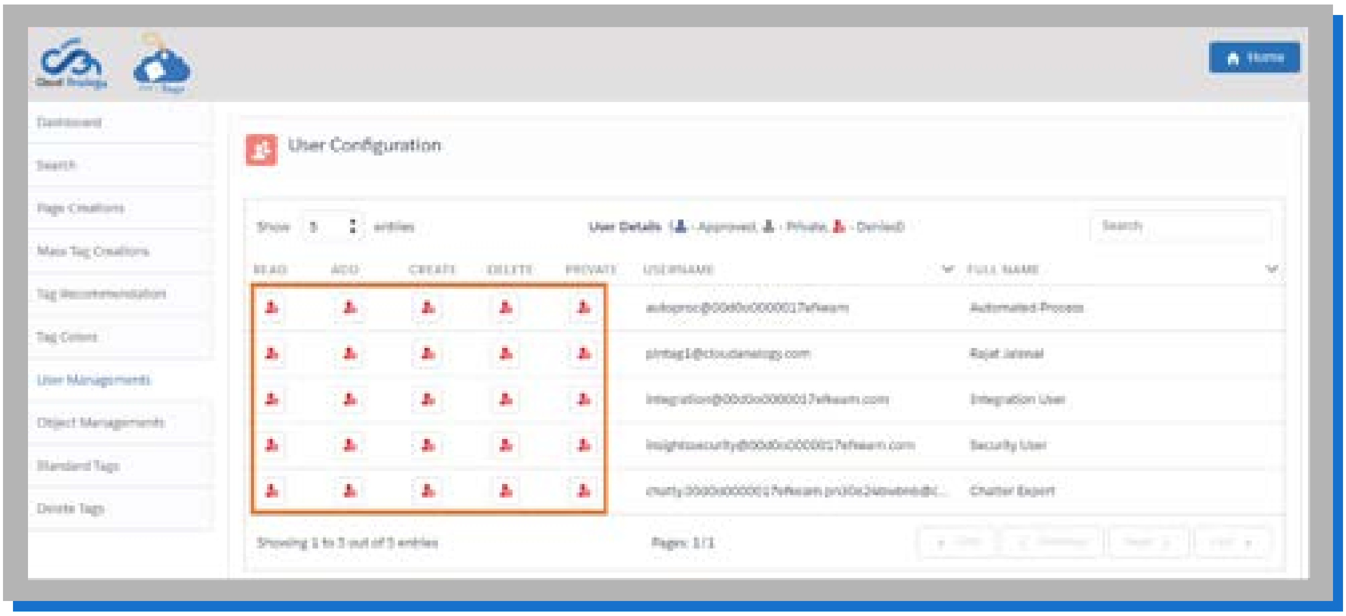
- **READ** - User can only view the tags added by the System Admin to a record.
- **ADD** - The system admin can provide access to add the tag for other users.
- **CREATE** - The user can also create the tags.
- **DELETE** - The user can only delete the tags he has created.
- **PRIVATE** - The user can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

Steps To Follow:

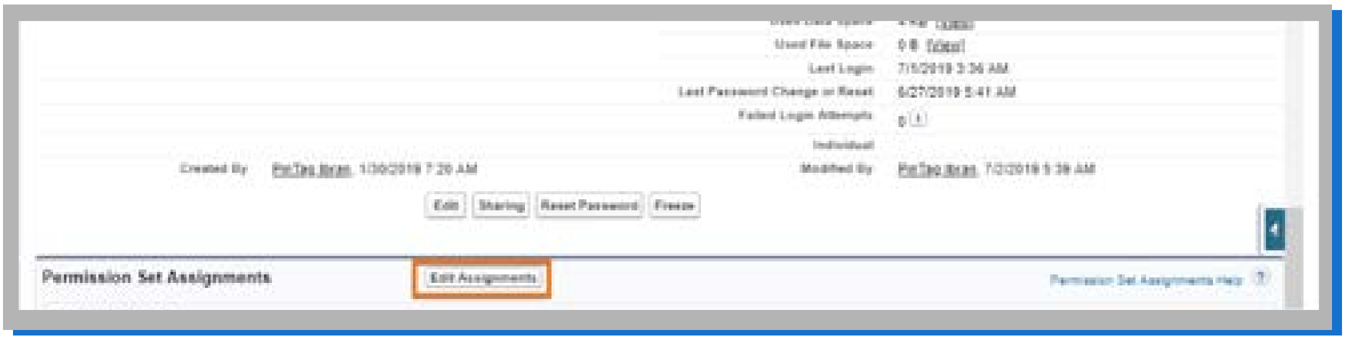
- Go to User Management.



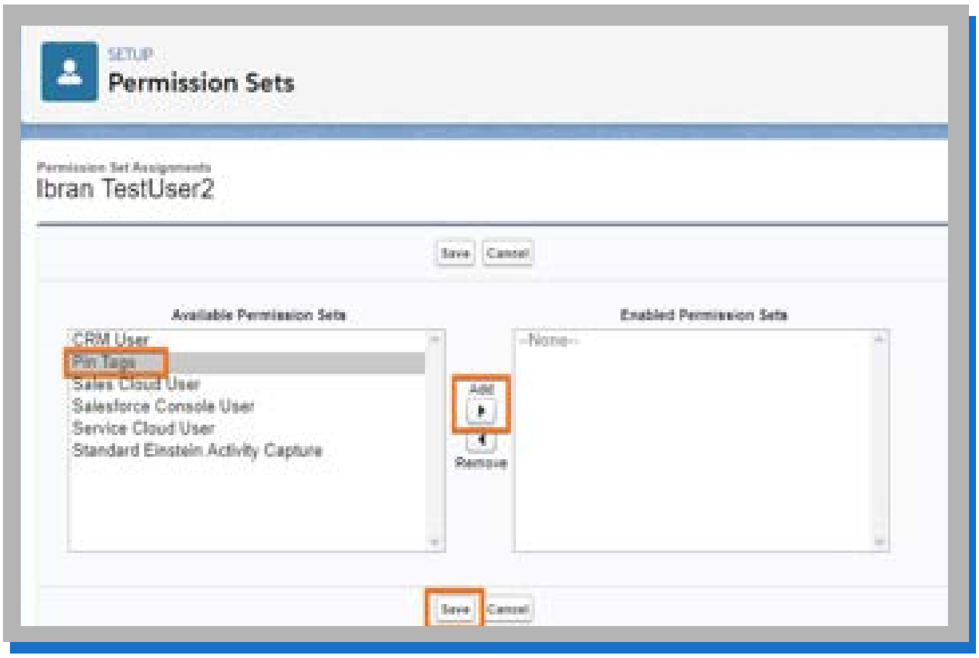
- Click the "Red icon" of the user for which you want to define permissions for adding, editing, or deleting tags.



- For permission set assignment, click on the “Edit Assignment” of the user to whom you want to assign permission.



- Move Pin tags from “Available Permission Sets” to “Enabled Permission. Sets”. Then click on Save.

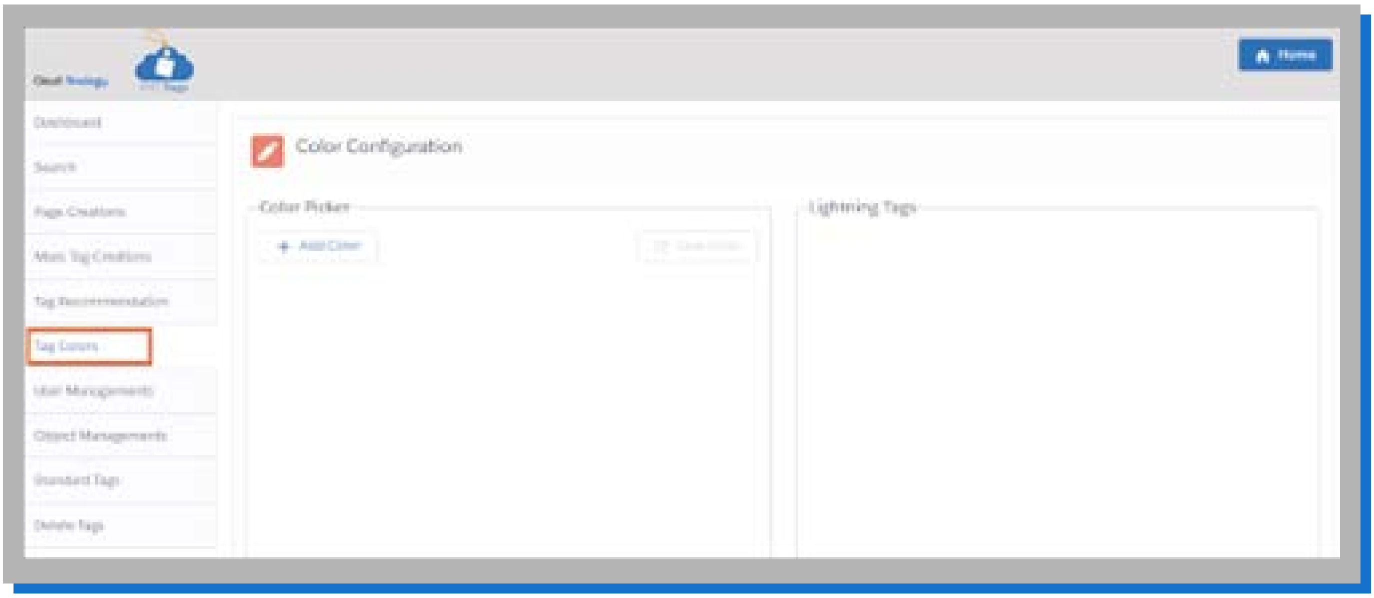


- Once done, the user can use the app feature according to the permission assignment.

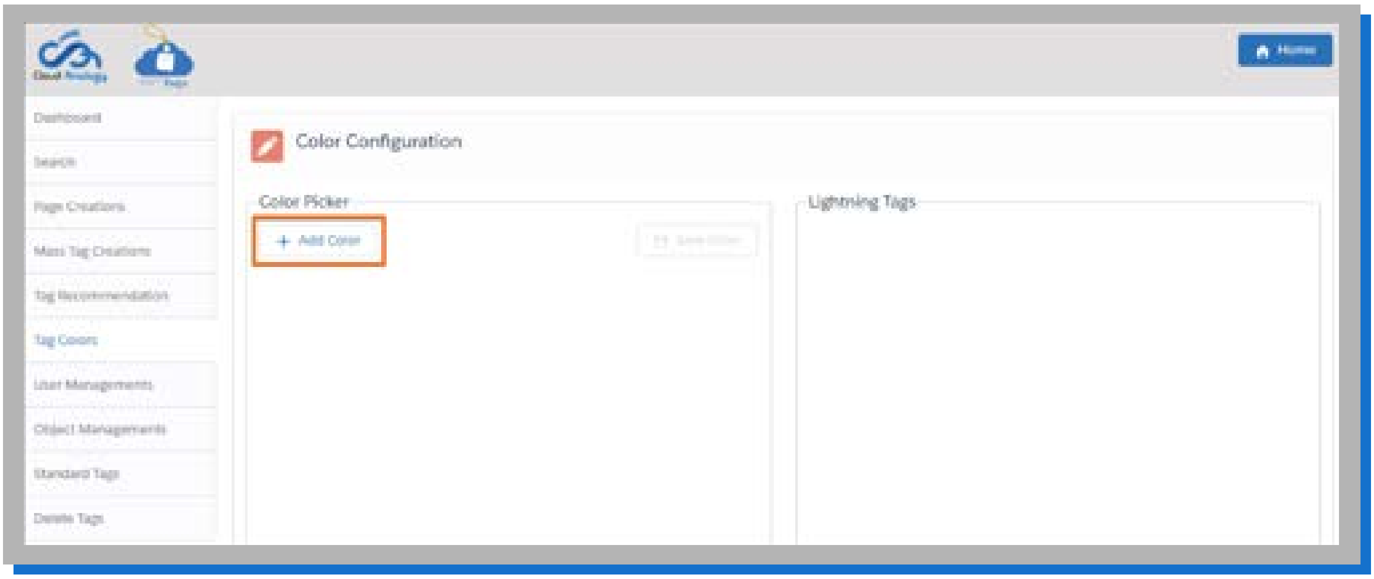
9. Tag Colors

Purpose: Helps identify and categorize tags visually.

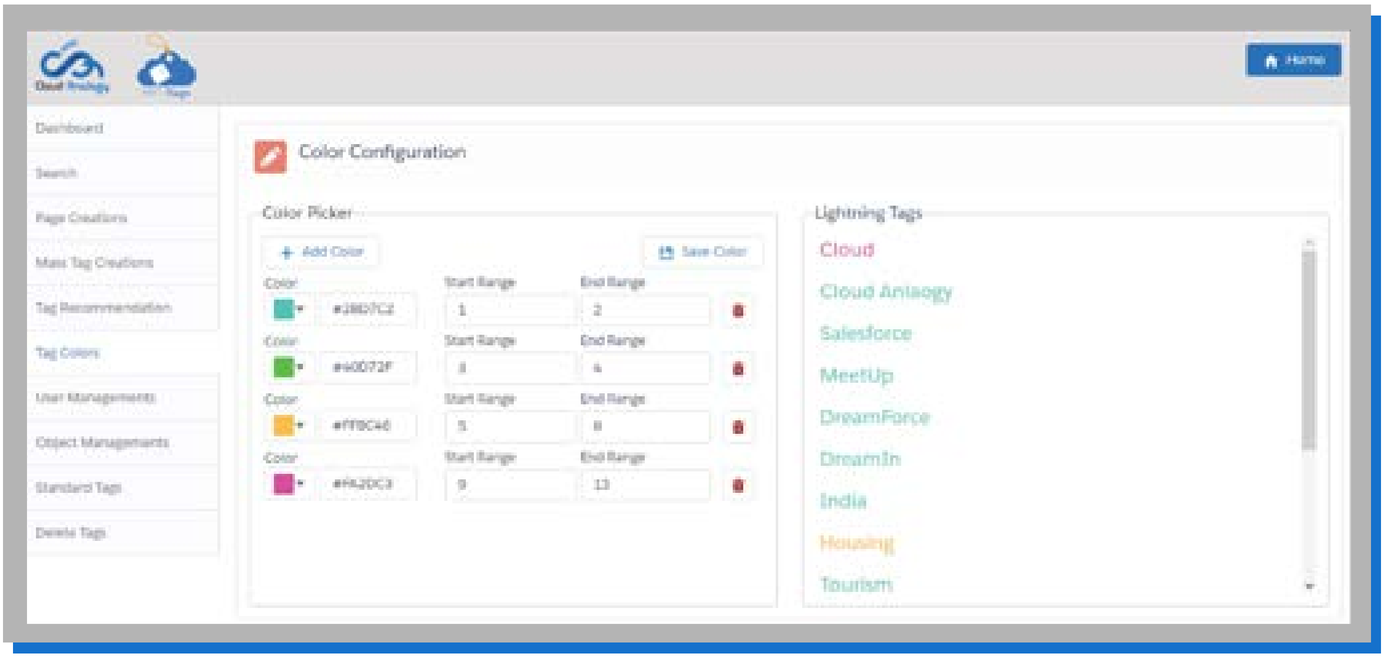
- Click on the "Tag Color" tab.



- Click the "+Add Color" button.



- Select the color from the drop-down list and then enter the start and end range to define the colors for tags based on their usage frequency.
- Now click on the “Save Color” button.



Steps To View Tags By Color

- Click on Home to see the tags appear in the specified colors within the PinTags component, helping you quickly identify frequently used tags.

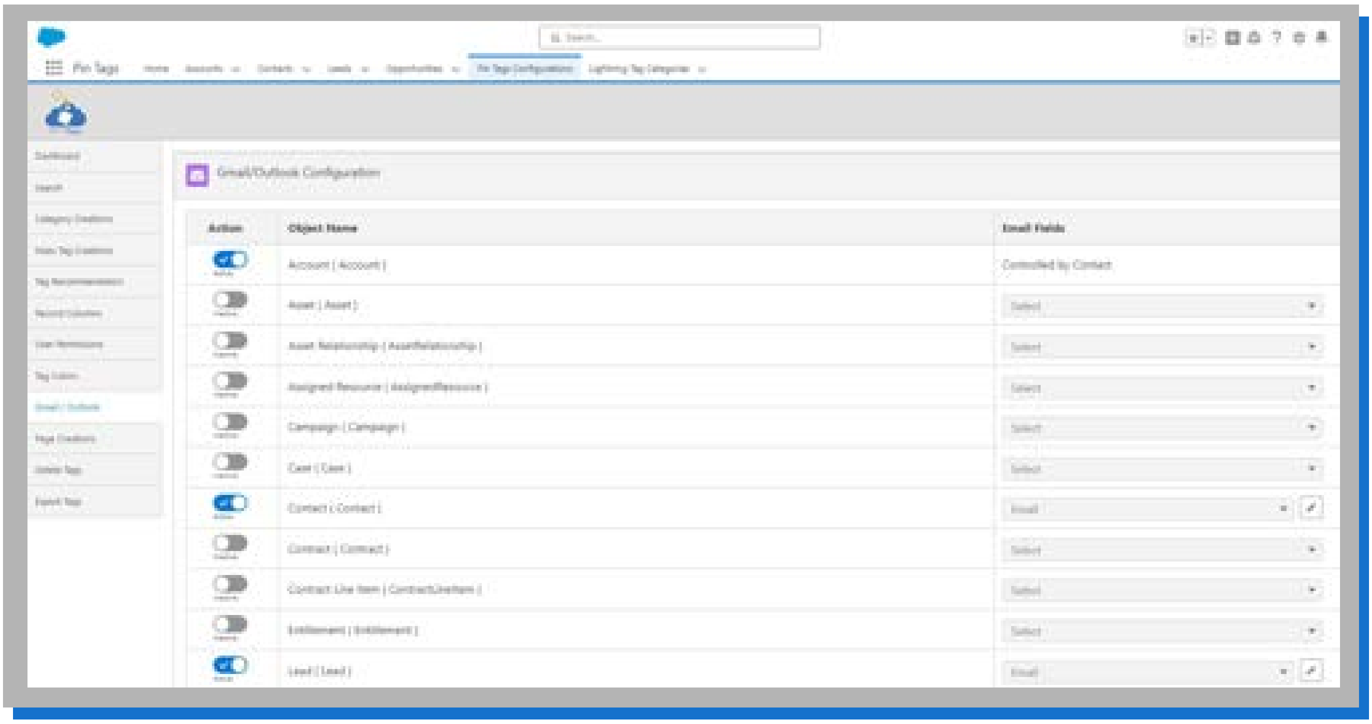
10. Gmail/Outlook Configuration

Purpose: Load related records, allowing efficient tagging without leaving your email inbox.

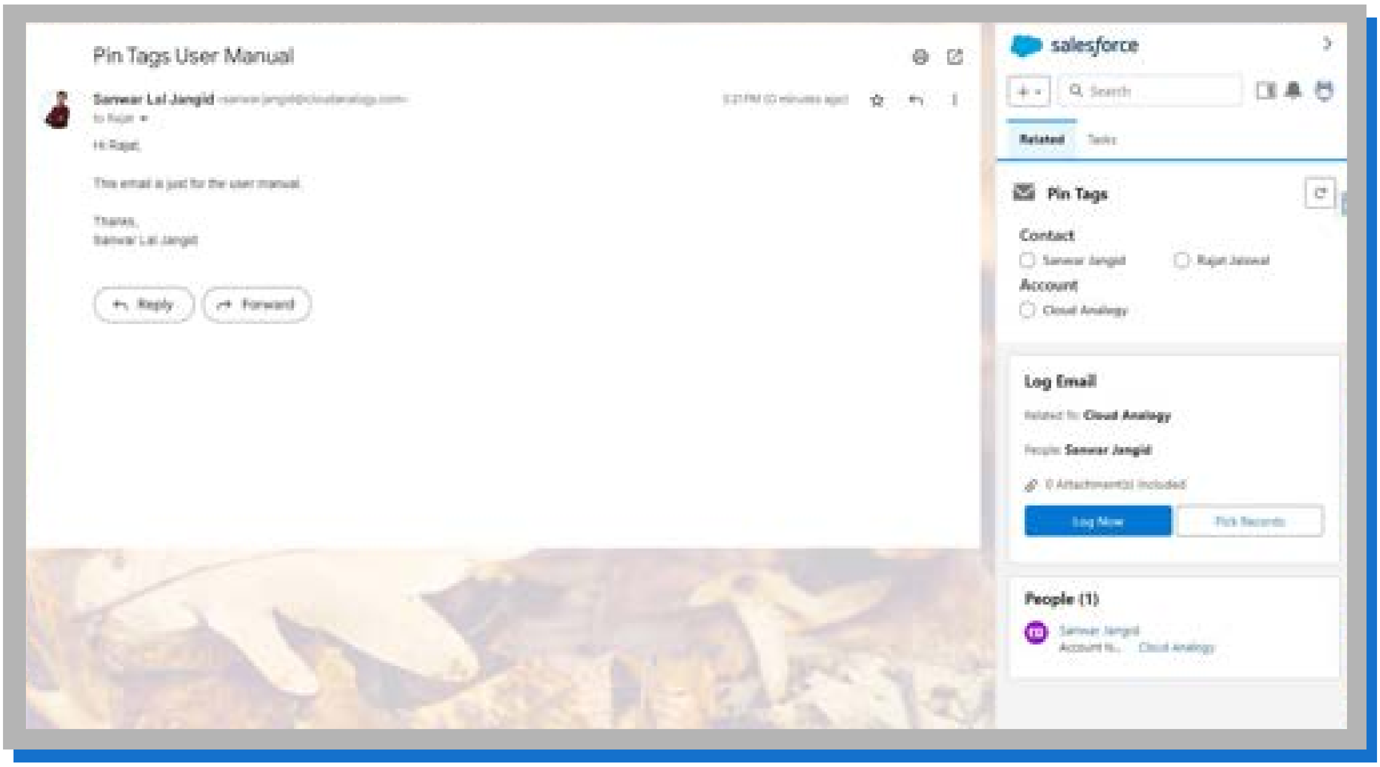
Salesforce Integration With Email/Outlook: Using Gmail or Outlook sync features, you can connect your Salesforce to Gmail & Outlook to add tags directly from your email.

Add Tags from Email:

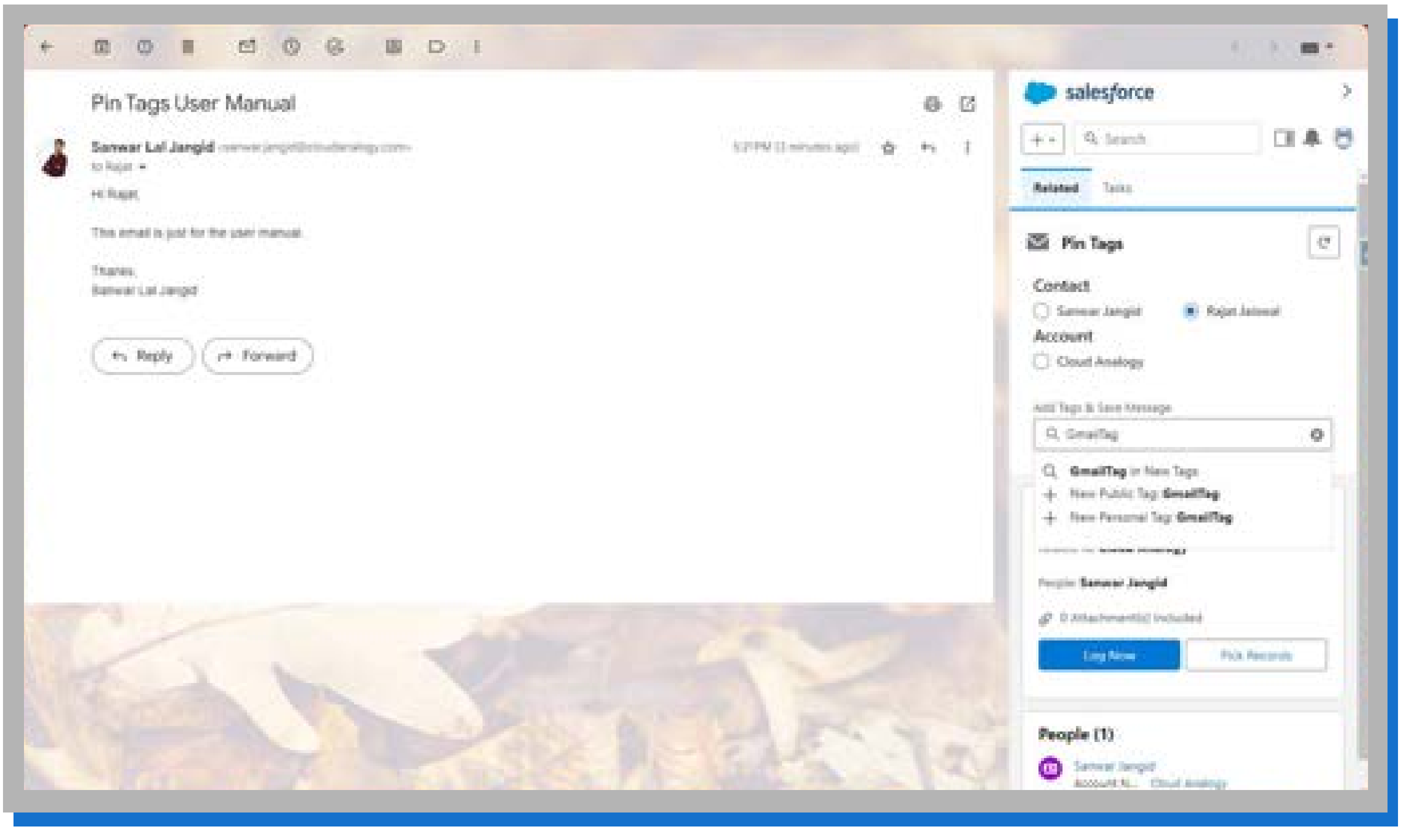
- Create a tag and apply it directly to related records (contacts, account, & opportunity) from an email.



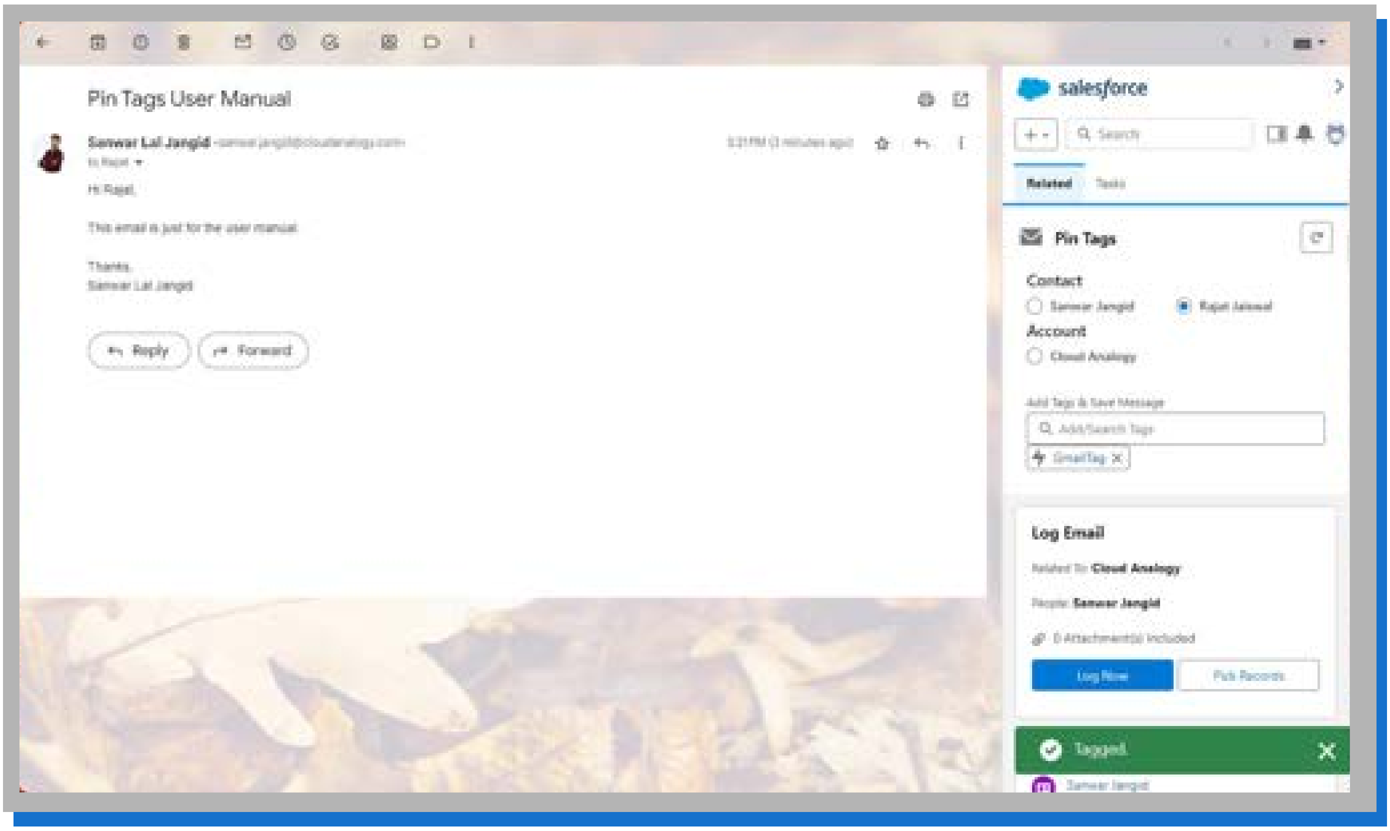
- Open any email and refresh the Pintags component on the right side to view related records.



- Create or add a tag for the selected email.



- Tag successfully created.



11.Standard Tags

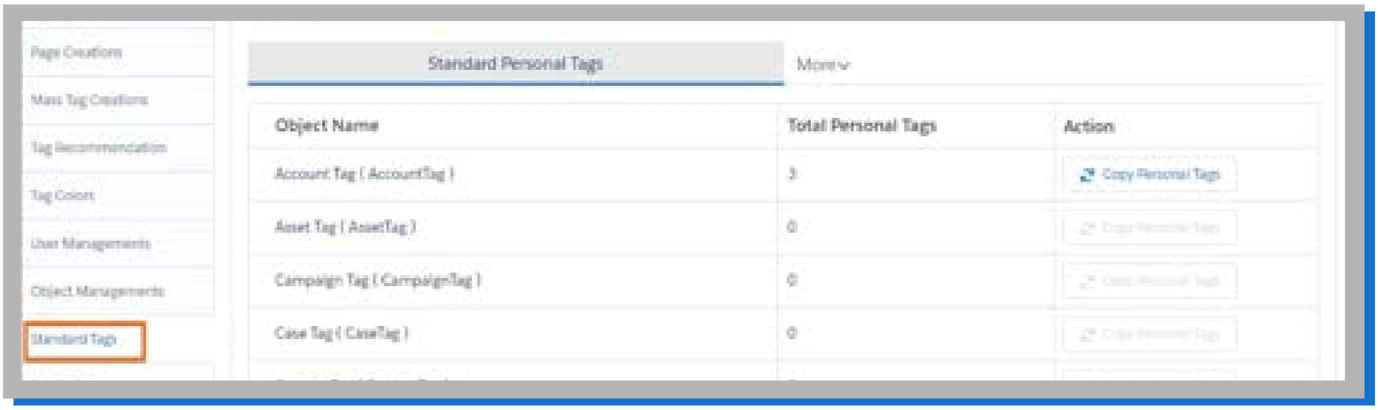
Purpose: Allows users to view and manage tags associated with standard Salesforce objects.

NOTE: The "Standard Tags" tab will appear when Standard Tag is enabled

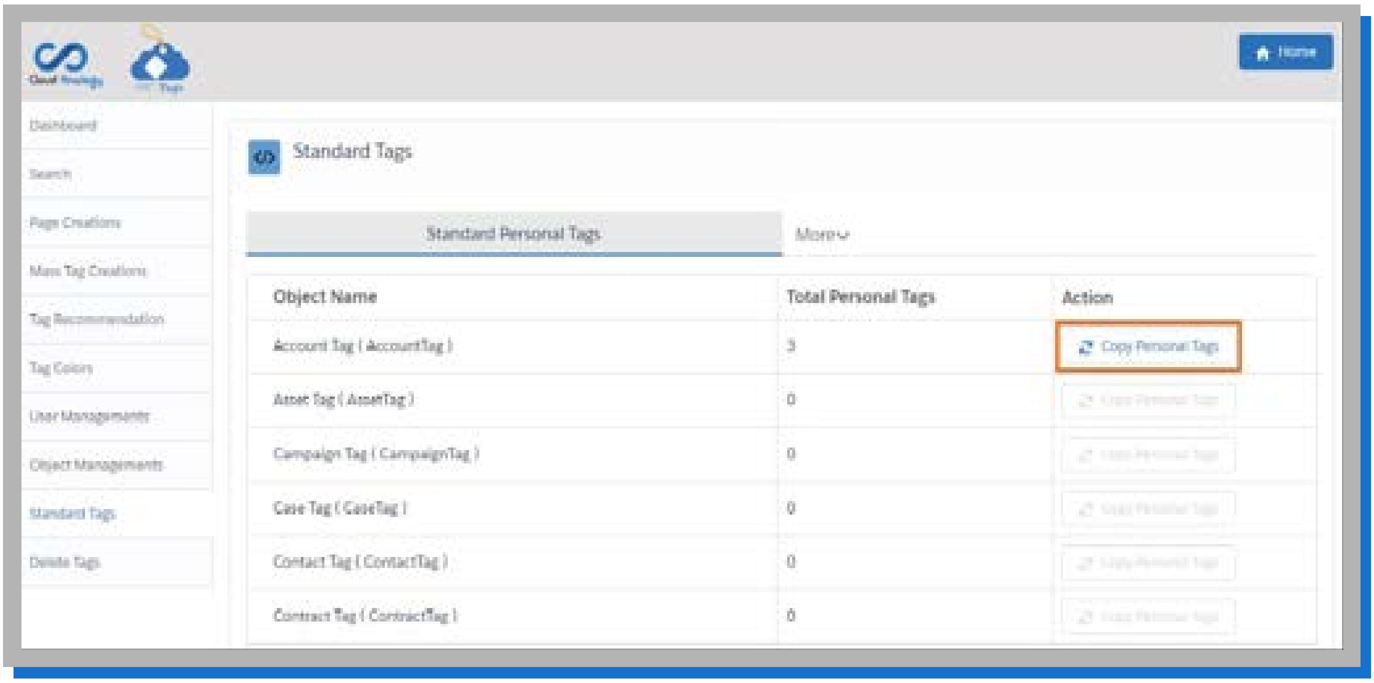
Steps to Enable Standard Tag:

1. From Setup, enter Tag Settings in the Quick Find box, then select Tag Settings.
2. Select Enable Personal Tags and Enable Public Tags to allow users to add personal and public tags to records.
3. Specify which objects and page layouts display tags in a tag section at the top of record detail pages.
4. Click Save.

- Click on the "Standard Tags" tab



- Click on the "Copy Personal Tags" button

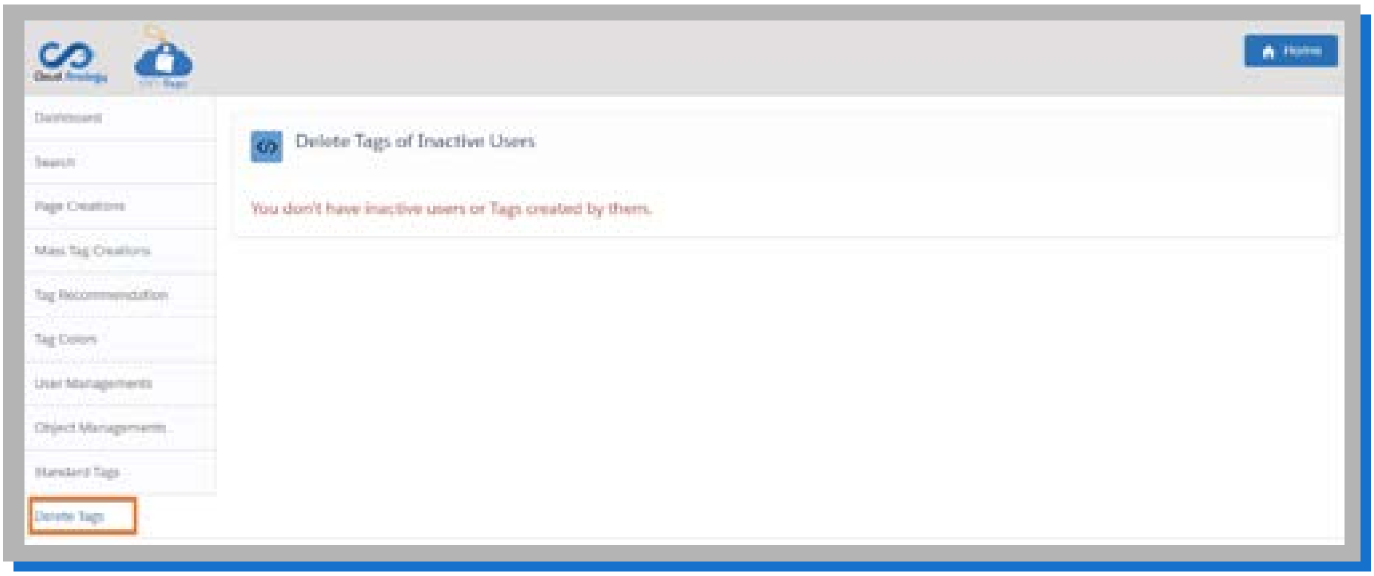


NOTE: You will receive an email after copying all the Standard tags in PinTags.

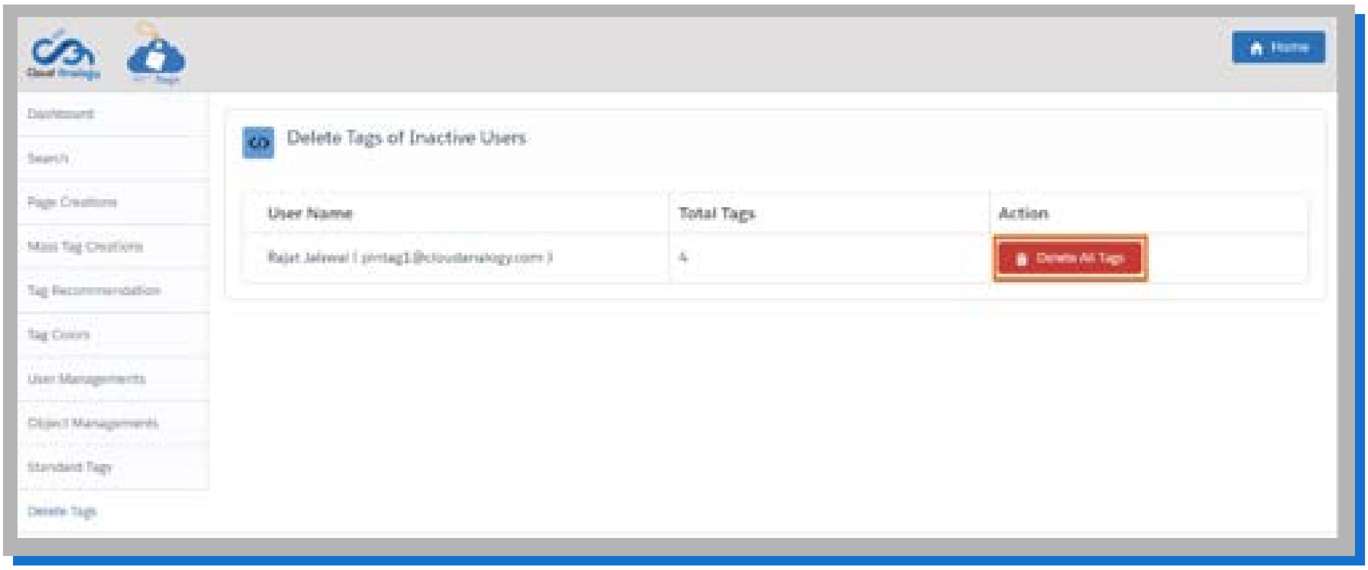
12. Delete Tags

Purpose: Allows admins to delete outdated or unnecessary tags.

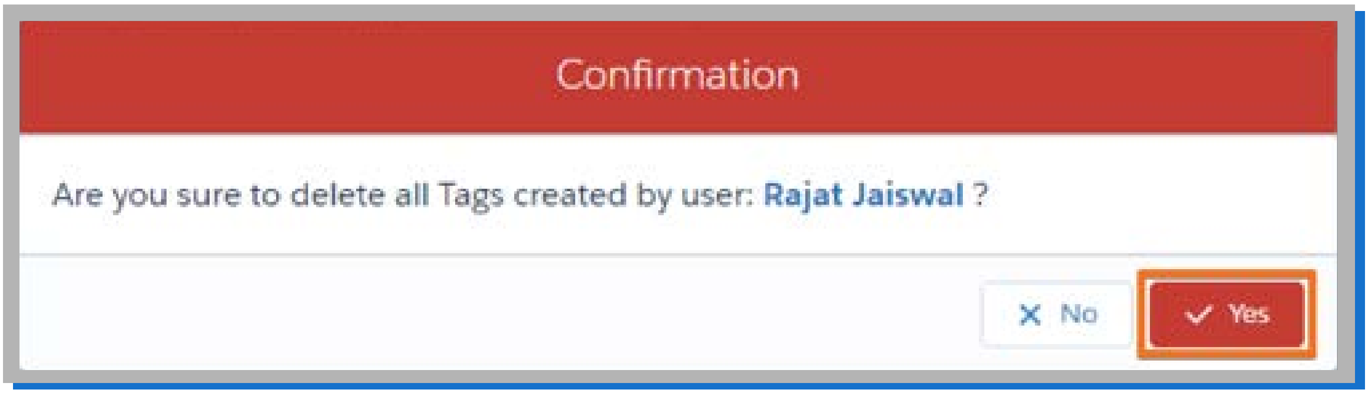
- Go to the Delete Tab in PinTags.



- Choose the tags you wish to delete from the system.
- Click on the "Delete All Tags" button of an inactive user that you want to delete.



- Click on the “Yes” button for confirmation.



13. Export Tags

Purpose: Facilitates the transfer of tags from a sandbox to a production environment.

- Go to the Delete Tab in PinTags.
- Select the tags you want to export from your Salesforce sandbox or production environment.
- Click “Export” to download the tag data.
- Follow the instructions to import the exported tags into your production environment or seek assistance from your system administrator.

THANK YOU

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Have A Great Time Using

PinTags

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