

5 Best ways to use



PIN Tags

in your CRM



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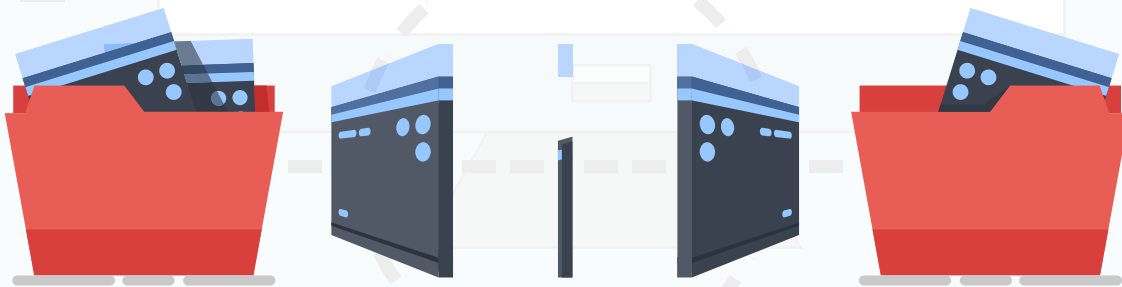


Right from the primitive times, the human race had felt the need to classify information. There are too many instances to cite but we can always refer to the way biological classification was started by Aristotle - dividing all organisms into plants and animals.

We all know about Salesforce as one of the leading CRM software and that it has emerged as one of the favourite of sales and marketing professionals, all over the world. Pintags is a one-of-a-kind app that enables the users to Pin and tag the Salesforce records, in your organization. Let us delve into the reasons as to why we need to use Pintags for classification of Salesforce records.

Why Classify Salesforce Records ?

When you have a huge number of Salesforce records, you will always feel the need to categorize them by using some sort of tags. This increases the searchability of the records, based on some parameters that you set. On top of all this, imagine that you have the option to segregate the records on the basis of private tags. It allows you to access records, as and when permitted and not every users will have the permissions to do so.



In this post, we provide you with some insights on 5 outstanding features of the Pintags app, that the user is bound to find, extremely beneficial.

What are the 5 Outstanding Features of Pintags?

The key features of Pintags that enables you to classify all your Salesforce records are:



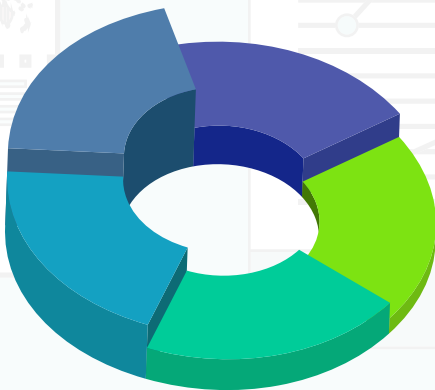
1. Pintags in Lightning Experience

Lightning experience is one of the greatest Innovations by Salesforce. You don't need to be a hardcore developer to start using Lightning for development. Simply drag and drop Lightning components to build mobile and desktop applications. You can always customize pages, just by using Lightning experience. Pintags is now available in the Lightning experience too. This enables you to act smarter. Now start using Lightning tags in Pintags- not just Classic.



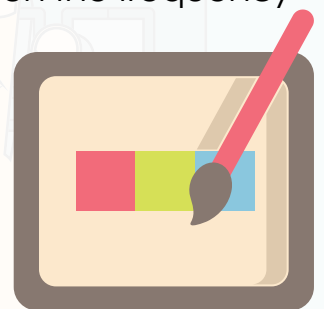
2. Popular Tags and Mass Tags

There are different types of tags that can be used in the Pintags app. There are popular and mass tags. The tags which are used for the maximum number of times are termed as popular tags in the parlance of Pintags. These tags are displayed in the popular tag component of your app. The popular objects are displayed as convenient Donut charts. On the contrary the mass tags are used for multiple records.



3. Use Color Tags for Meaningful Segregation of Records

The admin can use different colors for different tags, based on the frequency of usage by the users. This allows you to segregate records - all based on colors used.



4. Configure and Customize Permissions



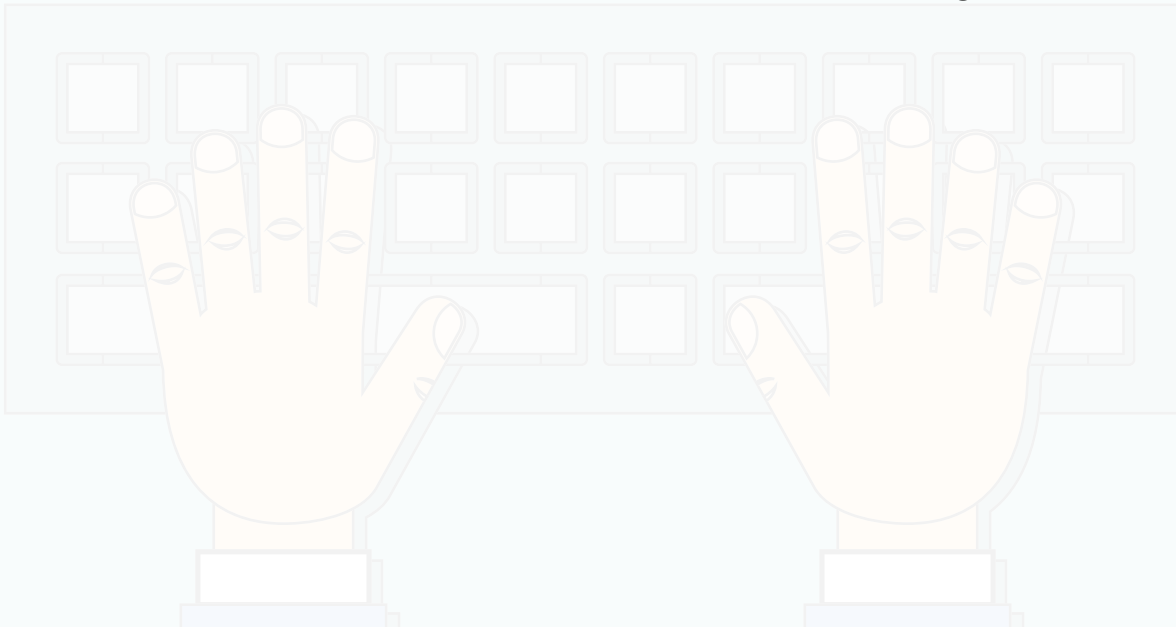
Pintags allows you to first configure and customize permissions for various users with User Management. There are different types of permissions - read, create, private and delete. The private tags are not accessible to all. The users have rights to create or delete tags. They can also have the permission to read the tags - with no rights for changing them.



2. Delete the Tags for Inactive Users

The tags for the inactive users can be deleted and restored at a later stage, if the user wishes to do so.

We conclude to say that Pintags is an awesome app that will enable you to form your own tagging strategy, for classifying the Salesforce CRM records of your organization. Pintags has an easy-to-use interface and has analytics based on the tags used in the app. It is these analytics that enable the user to make solid decisions - all based on the actionable insights from this app.





RAJAT JAISWAL

Author



AJAY KUMAR DUBEDI

Product Owner

THANK YOU

Cloud Analogy Softech (P). LTD



www.cloudanalogy.com



pintags@cloudanalogy.com



cloud.analogy



+1 (415) 830 3899