

Loom

Installation & Setup Guide for Lightning Experience

Table of Contents

Loom Overview	2
Understand How Loom Works	3
Nodes	3
Edges	4
Before You Install	5
System Requirements	5
How to Install Loom from the AppExchange	5
Requirements	6
Installation	7
Selecting Account Configuration Model	7
Custom Configuration Installation	7
Pre-Installed Nodes and Edges : Standard Configuration	8
Pre-Installed Nodes and Edges : NPSP Configuration	9
Adding Visualforce iFrame to Page Layouts	10
Loom Settings	12
Default Degrees	12
User Path Limit	12
Adding New Nodes and Edges	12
Standard Objects	12
Loom Node Creation	13
Loom Edge Creation	14
Custom objects	15
Adding visualforce component to new custom objects (direct relationship only)	17
Security Settings	18
Permission Sets	18
Profiles	21
Troubleshooting/Frequently Asked Questions	23

Loom Overview

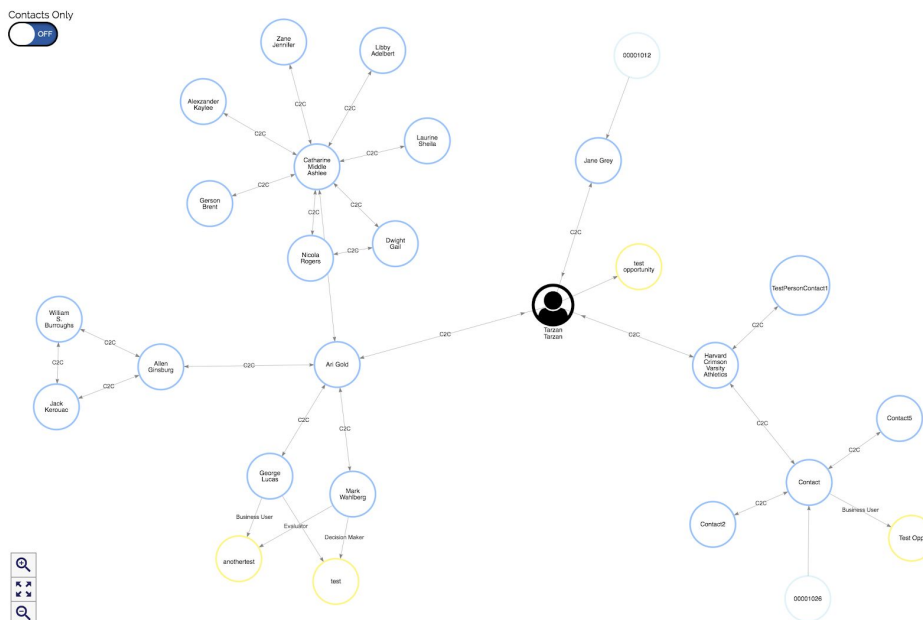
Find Your Path

Loom is a powerful tool that will help you to understand how you are connected, or could be connected, all within your Salesforce ecosystem. Instead of simply displaying information, Loom help you identify strategies to uncover new possibilities for engagement:

- Map up to 10 degrees of relationships between any object (e.g. households, donations, affiliations, etc.)
- Map any object or field (Standard or Custom)—anything can be a node or connection
- Highlight and filter data using any field
- Create paths to identify potential people or affiliations that could provide introductions to targets
- Customize interfaces for different users (e.g. sales, recruiting, fundraising, etc.)
- Works with any Salesforce configuration (e.g. NPSP, EDA, person accounts, etc.)
- Works with any size Salesforce instance—loads large amounts of data, quickly
- Easily generate lists to print or export to Excel

Loom was designed to be super customizable for large, complex companies with enormous amounts of data and easy enough to use for smaller organizations.

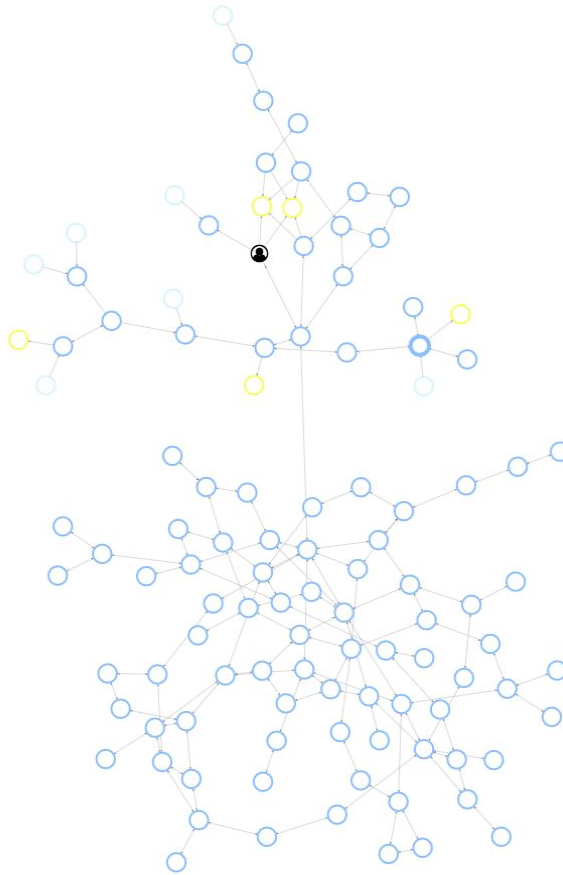
This document provides step-by-step instructions for installing and configuring Loom in your organization's sandbox or production Salesforce environment. For step-by-step instructions for using Loom features and examples of use cases, please see the **Features Guide**.



Understand How Loom Works

Nodes

Nodes connect objects together in Salesforce in order to visually show the various ways contacts or accounts are connected with other objects. For example, a contact might be involved in an opportunity through contact roles such as business user, decision maker, or technical buyer. A contact may also recommend another contact, work with a contact at another organization or be on another Board. All of these contact, account, and opportunity records are nodes, represented as circular “hubs” in the example Loom visualization below.



The goal of Loom is to help you see opportunities for connection and engagement that you may not otherwise see—because the person or organization you want to connect with is two, or three, or seven degrees of connection away from someone you know. These “hubs” are all possible connection points.

Edges

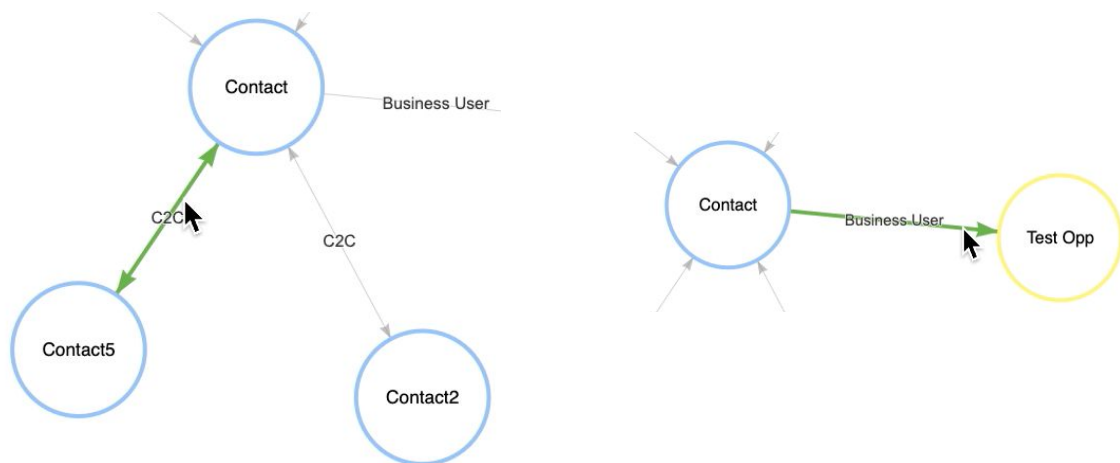
Edges show how two nodes are connected together, defining the relationship between two objects. Depending on the account model you select while installing Loom, different default edges are created to link the nodes together. In a contact-to-opportunity relationship, the Loom edge is likely a word that defines what type of relationship the contact has to the opportunity (opportunity contact role), such as decision-maker, business user, or evaluator. All of the connections between objects are represented as the lines or “spokes” below, which show both the directionality and type of relationship that exists between two nodes.

Edges help to show the strength of a relationship between two objects and evaluate the possibility of a successful path from someone or something you know to someone or something you want to meet.

Example: Let's say you are trying to connect with John Smith. Using Loom, you identify two people that are one degree of separation from him. But how do you determine which path is more promising? Loom edges tell you exactly how they are connected to John.

- Joan works at the same 10,000 person company as John.
- Mark serves on the same non-profit board with John.

Knowing this additional information, you can focus your efforts on connecting to John through Mark, the fellow board member, which is the stronger path to engagement.



Before You Install

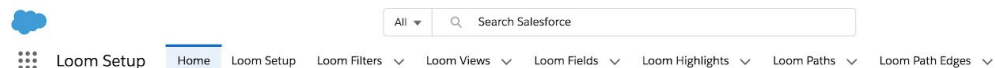
System Requirements

In order to use Loom, your Salesforce edition must be professional or higher (Professional, Enterprise, Unlimited, Force.com, Developer, or Performance edition).

How to Install Loom from the AppExchange

If you are installing Loom for the first time in your Salesforce instance, use the most recent version on the AppExchange.

1. Find Loom on the Salesforce AppExchange and click **Get It Now**.
2. Select your environment type: **production** or **sandbox** (test instance).
 - a. We recommend that you first install Loom in your **sandbox**.
3. Review the installation details, click the checkbox to indicate that you have read the terms and conditions of Loom, and then click **Confirm and Install**.
4. Login to your sandbox or production environment.
5. Depending on your Salesforce edition, choose a security option and click **Next**.
 - a. **Install for Admins Only** - will install for any users with *Customize Application* permission in their profile.
 - b. **Install for All Users** - will install Loom on all profiles.
 - c. **Install for Specific profiles** - Enables you to choose the usage access for all custom profiles in your organization. You can set each profile to either have full or no access to the package.
 - d. If you want to change the users who should have access to Loom after installation, you can do this in **Setup | Security Settings**.
6. Click **Install**. When the package installs successfully, you will receive an email from Salesforce.
7. Click on **Manage Licenses** to allocate your purchased licenses to users who will need access to Loom. Only users with a license will be able to see Loom visualizations and/or architecture.
 - a. If you do not allocate licenses at this step, it can be done by going to **Setup | Packages** on an account with proper permissions at any point.
8. You should see a handful of new tabs and a new app called **Loom Setup**.
 - a. If you do not see new tabs, go to the dropdown at the top right hand of your screen or the App Launcher and click **Loom Setup**.
9. Once you click **Loom Setup**, your screen should now look like this, with the following tabs.



If for some reason you cannot see the Loom tabs in step #9, or if your installation failed for any other reason, please see the [detailed instructions](#) for installing AppExchange packages provided by Salesforce.

Requirements

In order to correctly configure Loom for your organization's data model, it is very important that you determine the Account-Contact model that you use. Selecting the appropriate data model will allow Loom to determine what nodes and edges to set up automatically, instead of manually configuring each object-to-object relationship in Salesforce.

Loom can be installed with the following three configurations:

- Nonprofit Success Pack (NPSP) configuration
- Standard Salesforce configuration
- Custom configuration (not recommended for most users)

We recommend most users install either the Nonprofit Success Pack (NPSP) configuration or Standard Salesforce configuration. Use the Nonprofit Success Pack configuration if you have the Nonprofit Success Pack (NPSP) installed in your org.

If you do not know your org's account-contact model:

1. Go to the **App Launcher**.
2. Look at all of the tabs listed on the page - if you have either Contact Settings and/or Household Settings in the list, you have NPSP installed.
3. If you do not have either Contact Settings and/or Household Settings in the list, you do not have NPSP installed.

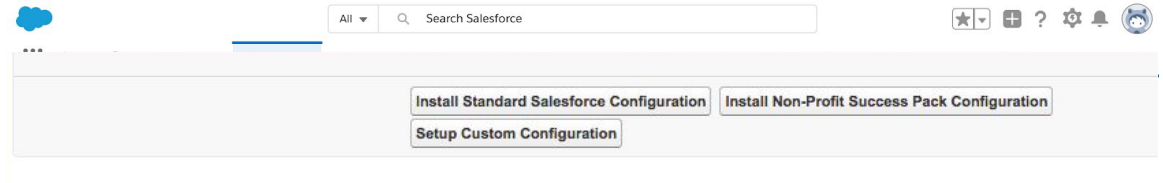
If you are an advanced user who wants to have control over which objects are linked together through Loom, select **Setup Custom Configuration**. You may need support from Yurgosky for this option, and should try it in your sandbox before installing Loom in production.

Installation

Selecting Account Configuration Model

Once you install Loom into your sandbox or production instance from the AppExchange, you will need to create the Nodes and Edges that will provide the visual and architectural basis for Loom.

1. Go to the **Loom Setup tab** in the Loom application.



2. Select the button that matches your instance's account-to-contact model, as determined in the Requirements section of this document:
 - a. Install Standard Salesforce Configuration
 - b. Install Non-Profit Success Pack Configuration
 - c. Setup Custom Configuration
3. Once you select a configuration option, Loom will automatically configure the Nodes and Edges detailed below, based on your selection.

Custom Configuration Installation

When you set-up Loom with **Custom Configuration**, objects or object-to-object relationships are not pre-configured.

In order to set up Nodes and Edges, you will need to follow the instructions under **Adding New Nodes and Edges**. Until this is done, you will not be able to view any network visualizations.

Pre-Installed Nodes and Edges : Standard Configuration

When you install Loom with the Standard Configuration (person account model), it pre-configures the following objects as pictured below:

- **Loom Nodes** - act as hubs on a wheel, or the focal point of connections between linked objects:
 - Account
 - Contact
 - Opportunity
 - Opportunity Contact Role (field on Opportunity)
 - Case
- **Loom Edges** - act as spokes on a wheel, labeling the type and directionality of relationships between linked objects:
 - Contact to Account: label is Account ID
 - Opportunity to Account: label is Account ID
 - Opportunity Contact Role to Contact: label is Contact ID
 - Opportunity Contact Role to Opportunity: label is Opportunity ID
 - Account to Account: label is Parent ID
 - Case to Contact: label is Contact ID

New Node

New Edge

Update Settings

▼ Settings

Default Degrees

5

Timeout Seconds

300

Default Incremental Loading

☒

User Path Limit

10

Default Initial Degrees

3

Nodes

	Name	Object	Query Filter (Optional)	Record Id Field	Record Label Field	Toggleable	Group
Edit Delete	YCN-007723	Case		Id	CaseNumber	☐	
Edit Delete	YCN-000057	Account		Id	Name	☒	account
Edit Delete	YCN-000058	Contact		Id	Name	☒	contact
Edit Delete	YCN-000059	Opportunity		Id	Name	☒	opportunity
Edit Delete	YCN-000060	OpportunityContactRole		contactId	ContactName	☒	contact
Edit Delete	YCN-007772	CaseContactRole		CasesId	Role	☒	
Edit Delete	YCN-007774	CaseComment		Id	CommentBody	☒	
Edit Delete	YCN-007773	ContractContactRole		ContactId	Role	☒	
Edit Delete	YCN-007779	AccountContactRole		Id	Role	☐	
Edit Delete	YCN-005635	loom__TestRecommendation__c		Id		☐	
Edit Delete	YCN-000190	loom__contacttocontact__c		Id	Id	☐	account

Edges

	Edge Name	Description	Child Node Object	Child Id Field	Relationship Field	Parent Node Object	Query Filter (optional)
Edit Delete	YVE-000070	Opportunity.AccountId (Account)	Opportunity	Id	AccountId	Account	Name != 'Test Opp'
Edit Delete	YVE-000071	OpportunityContactRole.contactId (Contact)	OpportunityContactRole	OpportunityId	contactId	Contact	

Pre-Installed Nodes and Edges : NPSP Configuration

When you install Loom with the Nonprofit Success Pack Configuration (household account model), it pre-configures the following objects:

- **Loom Nodes** - act as hubs on a wheel, or the focal point of connections between linked objects:
 - Account
 - Contact
 - Opportunity
 - Opportunity Contact Role
 - Case
 - Relationship (for Contact-to-Contact relationship)
 - Affiliation (for Account-to-Contact relationships)
- **Loom Edges** - act as spokes on a wheel, labeling the type and directionality of relationships between linked objects:
 - Contact to Account: label is Account ID
 - Opportunity to Account: label is Account ID
 - Opportunity Contact role to Contact: label is Contact ID
 - Opportunity Contact Role to Opportunity: label is Opportunity ID
 - Case to Contact: label is Contact ID
 - Case to Account: label is Account ID
 - Relationship to Contact: label is Contact
 - Relationship to Contact: label is Related Contact
 - Affiliation to Account: label is Organization
 - Affiliation to Contact: label is Contact

New Node

New Edge

Update Settings

▼ Settings

Default Degrees

5

Timeout Seconds

300

Default Incremental Loading

☒

User Path Limit

10

Default Initial Degrees

3

Nodes

	Name	Object	Query Filter (Optional)	Record Id Field	Record Label Field	Toggleable	Group
Edit Delete	YCN-007723	Case		Id	CaseNumber	☐	
Edit Delete	YCN-000057	Account		Id	Name	☒	account
Edit Delete	YCN-000058	Contact		Id	Name	☒	contact
Edit Delete	YCN-000059	Opportunity		Id	Name	☒	opportunity
Edit Delete	YCN-000080	OpportunityContactRole		contactId	ContactName	☒	contact
Edit Delete	YCN-007772	CaseContactRole		CasesId	Role	☒	
Edit Delete	YCN-007774	CaseComment		Id	CommentBody	☒	
Edit Delete	YCN-007773	ContractContactRole		ContractId	Role	☒	
Edit Delete	YCN-007779	AccountContactRole		Id	Role	☐	
Edit Delete	YCN-005635	loom__TestRecommendation__c		Id		☐	
Edit Delete	YCN-000190	loom__contacttocontact__c		Id	Id	☐	account

Edges

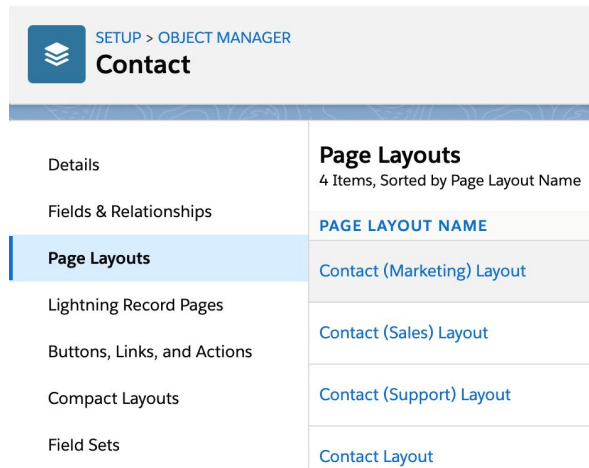
	Edge Name	Description	Child Node Object	Child Id Field	Relationship Field	Parent Node Object	Query Filter (optional)
Edit Delete	YVE-000070	Opportunity.AccountId (Account)	Opportunity	Id	AccountId	Account	Name != 'Test Opp'
Edit Delete	YVE-000071	OpportunityContactRole.contactId (Contact)	OpportunityContactRole	OpportunityId	contactId	Contact	
Edit Delete	YVE-000073	OpportunityContactRole.opportunityId (Opportunity)	OpportunityContactRole	contactId	opportunityId	Opportunity	
Edit Delete	YVE-008376	Contact.AccountId (Account)	Contact	Id	AccountId	Account	
Edit Delete	YVE-007931	Contact.AccountId (Account)	Contact	Id	AccountId	Account	
Edit Delete	YVE-007932	Contact.AccountId (Account)	Contact	Id	AccountId	Account	

Adding Visualforce iFrame to Page Layouts

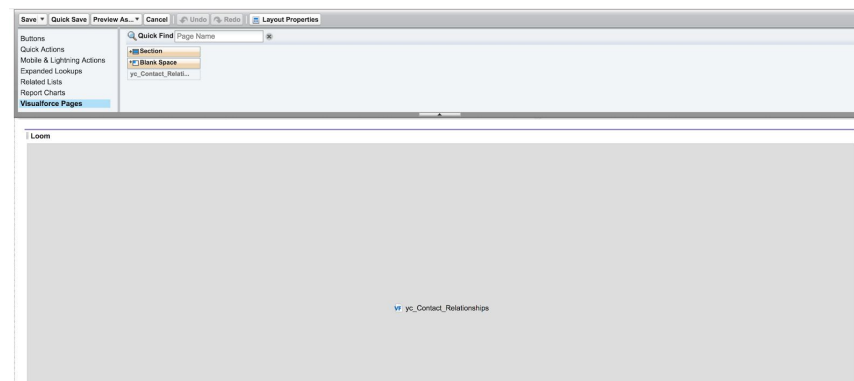
When you first install Loom, in order to see the visual mapping, you must add the Visualforce iFrame to the page layouts for contacts and accounts.

Contacts

1. Go to **Setup** (under the Gear symbol at the top right of the page).
2. Under **Platform Tools**, click on **Objects and Fields**, then **Object Manager**.
3. Click **Contact** and then click **Page Layouts**.



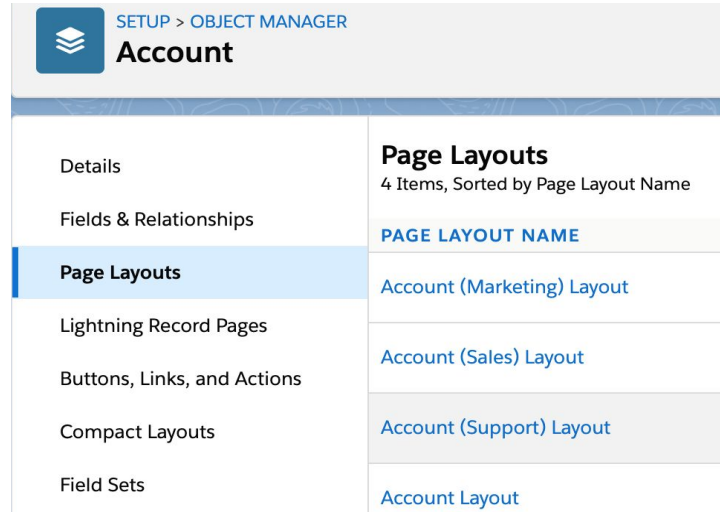
4. Click on the **Page Layout** you would like to add the Visualforce iFrame to.
5. Select **Section** from the top header and drag it to create a new section on the Contact Page layout screen.
6. On the Section Properties popup, label the section name "Loom" and select **1-Column** for layout.
7. On the left side of the Contact header, select **Visualforce Pages**.
8. Drag **yc_Contact_Relationships** into the new page section you just created (named "Loom").



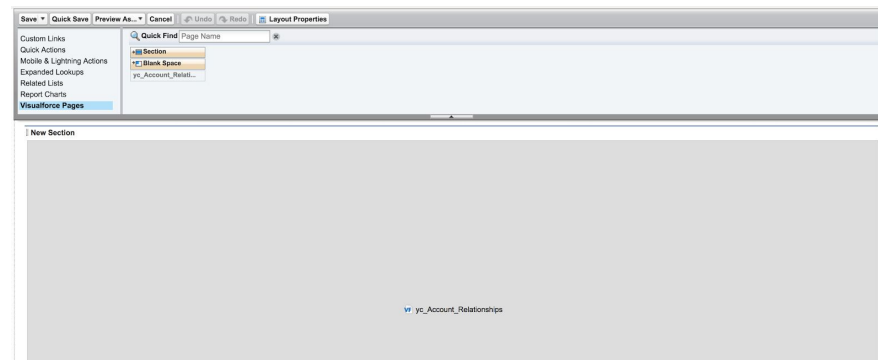
9. Hover over the Visualforce iFrame, then click the **wrench** in the top right corner.
10. Enter in "600" for the **Height (in pixels)** field and click **OK**. This will make the iFrame large enough to see the full Loom visualization.
11. Once you are satisfied with this Contact page layout, click **Save** on the top toolbar.
12. Repeat steps 1-10 for each contact page layout that should have Loom visualizations.

Accounts

1. Go to **Setup** (under the Gear symbol at the top right of the page).
2. Under **Platform Tools**, click on **Objects and Fields**, then **Object Manager**.
3. Click **Account** and then click **Page Layouts**.



4. Click on the **Page Layout** that you would like to add the Visualforce iFrame.
5. Select **Section** from the top header and drag it to create a new section on the Account Page layout screen.
6. On the Section Properties popup, label the section name "Loom" and select **1-Column** for layout.
7. On the left side of the Account header, select **Visualforce Pages**.
8. Drag **yc_Account_Relationships** into the new page section you just created (named "Loom").



9. Hover over the Visualforce iFrame, then click the **wrench** in the top right corner.
10. Enter in "600" for the **Height (in pixels)** field and click **OK**. This will make the iFrame large enough to see the full Loom visualization.
11. Once you are satisfied with this Account page layout, click **Save** on the top toolbar.

Now that you've configured Loom to view the Visualforce component - select a contact or account and take a look! You should see a web of connections between the selected contact to other contacts, accounts, opportunities, etc. If the area on the page layout where the Visualforce iFrame should be is blank, please see the FAQ section for troubleshooting help.

Loom Settings

In addition to Nodes and Edges, Loom also lets users customize the default number of degrees and the user path limit from the Loom Setup tab.

Default Degrees

Default degrees allows you to determine how many degrees of connection you want to see between two accounts and/or contacts. While you can input any number, we recommend a number between 3 to 5, since making successful connections 8 or 12 degrees away is relatively unlikely.

1. Go to **Loom Setup** tab.
2. Under **Settings**, change the input for **Default Degrees** to your desired number.
3. Click **Update Settings** button on the top right.
4. View a Loom visualization on a contact or account and watch how the number of Nodes has increased/decreased.

User Path Limit

In addition to viewing the map of connections between contacts, Loom also allows users to save "Paths" between accounts/contacts and other nodes. Through the Loom Setup tab, you can limit the number of "segments" in a user's path.

1. Go to **Loom Setup** tab.
2. Under Settings, change the input for **User Path Limit** to your desired number.
3. Click **Update Settings** button on the top right.
4. Create a Loom Path. If you do not know how to do this, consult the Features Guide.
5. Please note that you cannot create a path longer than the input you provided for User Path Limit.

Adding New Nodes and Edges

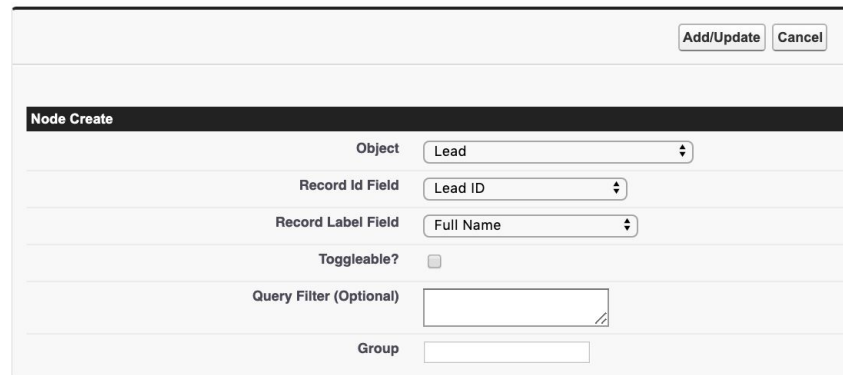
In addition to the pre-configured objects provided by Loom, you can customize Nodes and Edges to fit your organization's specific needs. This is relatively complex, and depending on what you are trying to do, you may need to reach out to Yurgosky for support.

Standard Objects

In most instances, based on your Loom configuration option, Loom will always create Nodes and Edges for standard objects that can be connected together, such as Account, Contact, Opportunity, and Case. If you chose the Custom Configuration option, you will need to follow these instructions. Otherwise, these instructions will only be necessary if you delete a Node and/or Edge and want to recreate it, or want to create a Node from a standard object not pre-created by the package.

Loom Node Creation

1. Go to the **Loom Setup** tab.
2. Select the **New Node** button on the top of the page.
3. Select the desired **Object** from the dropdown.
 - a. Nodes can be created for any object, but the steps here are only for standard objects. See below for instructions on creating Nodes and Edges for custom objects.
4. Select the **Record ID Field** from the list of available fields on the object.
5. Select the **Record Label Field**, which should be a descriptive field for records on this object.
 - a. In general, we recommend the field that you pick for **Record Label Field** be short enough to fit on the Loom visualization page (not a long text field), but also descriptive enough to show users what Node they are looking at.
6. Check the **Toggleable?** box to add a toggle button to the visualization that will allow you to turn the Node on/off on demand.
7. The **Query filter** allows you to write a formula or logic statement to only include certain records on the Loom visualization.

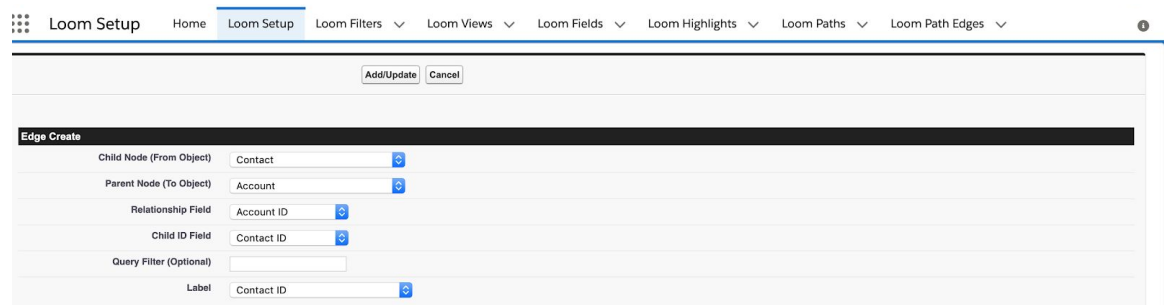


- a.
8. You may also enter characters in the **Group** field, which is used for categorization and to quickly identify what the Node is related to. We recommend grouping by "object name," such as "contact," "opportunity," etc.
9. When you have finished making your selections, click the **Add/Update** button at the top of the screen.
10. When you have successfully added a Node, the Loom Setup screen will list the newly created Node.
11. Repeat steps 1-10 to add any necessary objects. Keep in mind that objects cannot be added more than once, but they can be edited by selecting the **Edit** option to the left of the record.

Loom Edge Creation

In order for a Loom Node to show up on the visualization, it needs to be connected to other nodes (or other objects). This happens through Loom Edges, which are configured on the Loom Setup tab.

1. Go to the **Loom Setup** tab.
2. Select **New Edge** button at the top of the page.
3. Select the desired **Child Node** from the drop down menu.
4. Select the desired **Parent Node** from the drop down menu.
5. Next, select the **Relationship** field. This is the lookup or master-detail field on the child object that points to the parent object.
6. Next, select the **Child ID** field. This tells Loom what field on the Child Node to pull into the visualization.
7. Finally, select the **Label** field. This allows Loom to label the visualization.
 - a. For most use cases, you will use the same field API name that you provided in step 5 above. If you would like another label to be provided on the visualization, you can update or customize this via the label field.
8. Optionally, you can choose to use the **Query Filter** field, if desired. This field allows you to use standard logic to limit or restrict the records that are displayed. This uses standard Salesforce formula logic and characters.
9. The new Loom edge record should now look like this:



10. Click **Add/Update** to create the Loom Edge.
11. Once you create the **Loom Edge** record, you can navigate to the record's edit screen by scrolling to the "Edges" section of the "Loom Setup" tab to make two additional updates:
 - a. Determine if you want the Edge included in exports, via the **Include in Export** checkbox.
 - b. Determine if you would like to show an error on the visualization for this edge via the **Show Arrow** checkbox.

Edit YVE-007932

* Child Node ⓘ YCN-000058	Parent Node ⓘ YCN-000057
Child Object API Name Contact	Parent Object API Name Account
* Child Id Field ⓘ Id	Query Filter
* Relationship Field ⓘ AccountId	
Display Information	
Label Id	Include in Export ☒
Show Arrow ☒	
Cancel Save & New Save	

Custom objects

Loom will not automatically create Nodes or Edges for any custom objects in your Salesforce instance. In order to set up Loom Nodes and Edges correctly for any custom objects that you want to display on your visualization, you first need to determine if the two objects in question have a direct relationship or many-to-many (junction object) relationship. For further detail on these two types of relationships and to help distinguish these two types of relationships from one another, please see the Salesforce help article [here](#).

Direct relationships

In order for custom objects to display on the Loom visualization, you must first add the Node for each object. To add new nodes, please follow the steps found under Loom Node Creation. Once the two nodes are created for two custom objects with a direct relationship, follow the steps below to add a new Loom Edge that connects those two Nodes.

- Go to the **Loom Setup** tab and select **New Edge**.
- Select **parent object** in the **From Object** picklist.
- Select the **child object** in the **To Object** picklist.
- Select how the objects are related to one another in the **Objects Related By** picklist.
- Under the **Relationship Label** field, choose the field you would like to label the relationship.
 - Optionally, you can choose to hide this field on the visualization by checking off the **Hide Relationship Label** checkbox.
- You may filter records that generate a Loom Edge record in the **Filter** field. This will allow you to restrict the records that generate a Loom Edge on a Loom visualization.
- Next, confirm the icon style that will be used for this edge. You can either use a predefined icon style by selecting an option in the **Icon Style** picklist, or select **Custom** which will allow you to customize the graphic and the color of the icon.
 - In order to customize the icon, the values for the graphic and the color must be stored as fields on an object related to the custom object associated with one of the two Nodes associated with this Loom Edge. Those two fields will

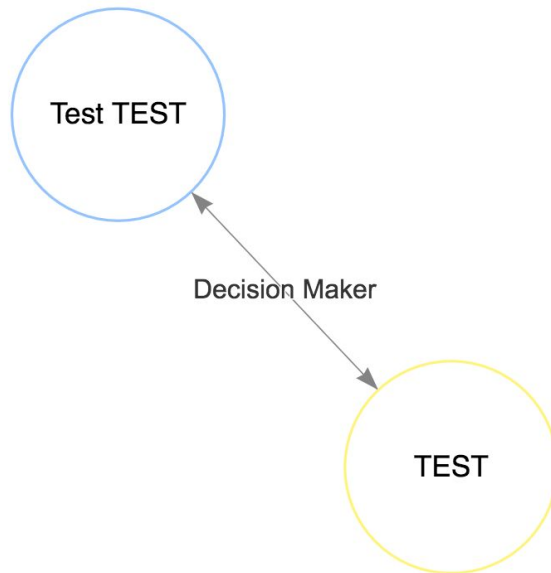
need to populate **Custom Icon Graphic Field API** and **Custom Icon Color Field API**.

8. Finally, provide the "ID Field API name" of the "object to" and "object from" for this Loom Edge in the **Object To Id API field** and **Object From Id API**.
9. Once complete, select **Save/Update** at the top of the screen. The new edge record should now be displayed on the Loom Setup screen as well as the Loom visualization.

Junction objects

In order to display the visualization for two objects connected via junction object, you need to set up Loom Nodes and Edges for all three of the related objects. Once setup, you can then hide the junction object, so the visualization only displays the many-to-many connection between the two objects you want to see data about. To setup this type of relationship, follow the instructions below.

1. Create three Nodes for each of the three objects in question: the two related objects and the junction object.
2. Create a Loom edge between the primary master object and the junction object by choosing **Loom Setup** and selecting **New Edge**.
3. Populate the primary "master/parent object" as the **Object From** field and the "junction object" as the **Object To** field.
4. Select the lookup field on the junction object as the **Objects Related By** field.
5. Populate the **Relationship Label** field with the master-detail/lookup field on the child object that points to the parent.
6. Check off the **Show Arrow** checkbox.
7. Optionally, you may filter the records that are visualized through this Edge with the **Filter** field.
8. Finally, you can customize the icon used for the Loom Edge by selecting "Custom" as the **Icon Style**. If you would like to use a predefined Icon Style, select the icon style from the picklist.
9. Next, we will create a new Loom Edge between the junction object and the secondary master. To do so, follow steps #3-7 above.
10. Completing the steps above for both Nodes related to the junction Node will create a visualization that looks like the example below -- one Loom Edge with a double-ended arrow that represents the relationship between two objects related via a junction object.



Adding visualforce component to new custom objects (direct relationship only)

Once you've created Loom Nodes and Edges for custom objects in your Salesforce environment, it may make sense to display the Loom visualization on additional objects, aside from contacts and accounts (which come out of the box). To do so, you must take an additional step for each object that you would like the visualization displayed on.

1. Go to **Setup | Platform Tools | Custom Code | Visualforce Pages** or search for **Visualforce Pages** under **Setup**.
2. Click **New** at the top of the screen.
3. Create a **Name** and **Label** for your Visualforce page. We recommend "Loom OBJECT NAME Relationship" and "Loom_OBJECTNAME_Relationship," respectively.
4. Copy and paste the following code into the Visualforce markup section. Remove any default text automatically inserted by Salesforce:
 - a. `<apex:page standardController="OBJECTNAMEHERE__c" extensions="NetworkStandardController" id="Network" standardStylesheets="false" sidebar="false" showHeader="false" applyBodyTag="false" applyHtmlTag="false" docType="html-5.0"> <c:Network standardController="true" sRecordId="{!sRecordId}" sRecordTypeId="{!sRecordTypeId}" clientMode="true" /> </apex:page>`
5. Replace `OBJECTNAMEHERE__c` with the API Name of the object that you want the Loom visualization displayed on.
6. Choose to **Save** the Visualforce page.
7. Add Visualforce component to page layout of your custom object.

Security Settings

If you originally installed Loom for Admins only or for selected users in your org and would like to expand your Loom user base to include new users, you must give those users rights to access Loom objects and Visualforce pages. This can either be done through permission sets or profiles, depending on who you are providing access to.

Permission Sets

To create new Permission Set for Loom, follow these steps:

1. Go to **Setup**.
2. Under **Administration** click **Users**, then **Permissions Sets**.
3. Click the **New** button to create a new permission set.
 - a. In the **Label** field, name the permission set something descriptive, such as "Loom User" and the **API Name** will auto-populate.
 - b. Enter a **Description**, such as "Enables Loom visualization tool."
 - c. Leave **Session Activation Required** "unchecked."
 - d. Select the appropriate permission set license.
 - e. Click **Save**.

Permission Set
Create [Help for this Page](#)

Save Cancel

Enter permission set information ! = Required Information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License --None--

Save Cancel

Object Settings

1. From the Permission Set Overview page, under **Apps**, click **Object Settings**.
2. Find all objects that start with "Loom..." - there should be 11, excluding "Loom Filters (deprecated)."

Loom Edges	Read, Edit, Delete	25	Visible
Loom Fields	Read, Edit, Delete	8	Visible
Loom Filters	Read, Edit, Delete	14	Visible
Loom Filters (deprecated)	Read, Edit, Delete	5	Visible
Loom Highlights	Read, Edit, Delete	9	Visible
Loom Nodes	Read, Edit, Delete	11	Visible
Loom Path Edges	Read, Edit, Delete	9	Visible
Loom Paths	Read, Edit, Delete	8	Visible
Loom Setup	--	--	Visible
Loom View Edges	Read, Edit, Delete	5	--
Loom View Filters	Read, Edit, Delete	5	--
Loom Views	Read, Edit, Delete	8	Visible

3. Click on a Loom object, then click **Edit** to change permissions for that object.
 - a. Under **Tab Settings**, check **Available** and **"Visible"** to allow access to each object's tab. Keep in mind that giving users access to the Loom Setup tab will let them create/delete/edit Loom Nodes and Edges.
 - b. Under **Object Permissions**, check **Enabled** to allow "Read", "Create", "Edit", "Delete", "View All" and "Modify All" permissions, as needed.
 - c. Under **Field Permissions**, manage Read or Edit access for each field, as needed.
 - d. Click **Save**.


SETUP

Permission Sets

Permission Set
Loom User



[Permission Set Overview](#) > [Object Settings](#) ▼ [Accounts](#) ▼

Accounts

Object Permissions

Permission Name	Enabled
Read	☐
Create	☐
Edit	☐
Delete	☐
View All	☐
Modify All	☐

Field Permissions

Field Name	Read Access	Edit Access
Account Name	☒	☒
Account Number	☐	☐
Account Owner	☒	☒
Account Site	☐	☐
Account Source	☐	☐
Active	☐	☐
Annual Revenue	☐	☐
Billing Address	☐	☐
CM Prospect Rating	☐	☐
Created By	☒	☐
Customer Priority	☐	☐
D&B Company	☐	☐
Data.com Key	☐	☐
Description	☐	☐

Visualforce Page Access

1. From the Permission Set Overview page, under **Apps**, click **Visualforce Page Access**, then **Edit**.
2. Click on all Visualforce pages starting with "loom" under **Available Visualforce Pages**. Then, click **Add** to move the page to **Enabled Visualforce Pages** (right column).
 - a. You do not need to move the following Visualforce pages:
 - i. loom.yc_Account_Relationships_Old
 - ii. loom.yc_Contact_Relationships_Old
3. Once all pages have been enabled, click **Save**.

Permission Set
Loom User

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Save Cancel

Available Visualforce Pages		Enabled Visualforce Pages
loom.yc_Account_Relationships_Old loom.yc_Contact_Relationships_Old	Add Remove	loom.Network loom.NetworkLoad loom.NetworkTest loom.Network_Setup loom.SoniaTest loom.yc_Account_Relationships loom.yc_Contact_Relationships

Apex Classes

1. From the Permission Set Overview page, under **Apps**, click **Apex Classes**, then **Edit**.
2. Click on all Apex Classes starting with "loom." under **Available Apex Classes**. Then, click **Add** to move the class to **Enabled Apex Classes** (right column).
3. Once all classes have been enabled, click **Save**.

Permission Set
Loom User

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Apex Class Access

Apex Class Access Save Cancel

Available Apex Classes		Enabled Apex Classes
--None--	Add Remove	loom.EdgeType loom.EdgeTypeTest loom.Filter loom.FilterTest loom.Highlight loom.HighlightTest loom.LoomField loom.LoomFieldTest loom.NetworkController loom.NetworkControllerHelper loom.NetworkOld loom.NetworkSetupController loom.NetworkStandardController loom.NetworkTests loom.PathEdge

Assigned Apps

1. From the Permission Set Overview page, under **Apps**, click **Assigned Apps**, then **Edit**.
2. Go to **Assigned Apps** and move "loom.Loom Setup" to **Enabled Apps** (right column) and click **Save**.

Permission Set
Loom User

Find Settings...  [Clone](#) [Delete](#) [Edit Properties](#) [Manage Assignments](#)

[Permission Set Overview](#) > **Assigned Apps** ▼

Assigned Apps [Save](#) [Cancel](#)

Available Apps		Enabled Apps
App Launcher (standard__AppLauncher) Community (standard__Community) Content (standard__Content) Lightning Usage App (standard__LightningInstrumentation) Marketing (standard__Marketing) Platform (standard__Platform) Sales (standard__LightningSales) Sales (standard__Sales) Salesforce Chatter (standard__Chatter) Sample Console (standard__ServiceConsole) Service (standard__Service) Site.com (standard__Sites) loom.Force.com (loom__Force_com)	Add ▶ Remove ◀	loom.Loom Setup (loom__Loom_Setup)

Profiles

Modify a custom profile to give users access to Loom.

1. Go to **Setup**.
2. Under **Administration**, click **Users**, then **Profiles**.
3. Click **Edit** next to the profile you wish to modify.
4. Under **Custom App Settings**, check the **Visible** box for "Loom Setup (loom__Loom_Setup)"
5. Under **Tab Settings | Custom Tab Settings**, select **Default On** in the dropdown for the following: "Loom Edges," "Loom Fields," "Loom Filters," "Loom Highlights," "Loom Nodes," "Loom Path Edges," "Loom Paths," "Loom Setup," "Loom Views," and "Node Styles."

Custom Tab Settings

Loom Edges	Default On	Loom Path Edges	Default On
Loom Fields	Default On	Loom Paths	Default On
Loom Filters	Default On	Loom Setup	Default On
Loom Filters (deprecated)	Tab Hidden	Loom Views	Default On
Loom Highlights	Default On	Node Styles	Default On
Loom Nodes	Default On		

6. Under **Custom Object Permissions**, select desired permissions for the following: "Loom Edges," "Loom Fields," "Loom Filters," "Loom Highlights," "Loom Nodes," "Loom Paths," "Loom Path Edges," "Loom Views," "Loom View Edges," "Loom View Filters," and "Node Styles."
7. Click **Save**.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
contacttocontacts	☒	☒	☒	☒	☒	☒
Loom Edges	☒	☒	☒	☒	☒	☒
Loom Fields	☒	☒	☒	☒	☒	☒
Loom Filters	☒	☒	☒	☒	☒	☒
Loom Filters (deprecated)	☐	☐	☐	☐	☐	☐
Loom Highlights	☒	☒	☒	☒	☒	☒
Loom Nodes	☒	☒	☒	☒	☒	☒
Loom Paths	☒	☒	☒	☒	☒	☒

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Loom Path Edges	☒	☒	☒	☒	☒	☒
Loom Views	☒	☒	☒	☒	☒	☒
Loom View Edges	☒	☒	☒	☒	☒	☒
Loom View Filters	☒	☒	☒	☒	☒	☒
Node Styles	☒	☒	☒	☒	☒	☒
TestExperiences	☒	☒	☒	☒	☒	☒
TestRecommendations	☒	☒	☒	☒	☒	☒

8. Scroll to the bottom to **Enabled Apex Class Access** and hit **Edit**.
9. Move each apex class that starts with "loom." to **Enabled Apex Classes** (right side) and click **Save**.

Enable Apex Class Access

Save

Cancel

Available Apex Classes

--None--

Add

Remove

Enabled Apex Classes

loom.EdgeType
loom.EdgeTypeTest
loom.Filter
loom.FilterTest
loom.Highlight
loom.HighlightTest
loom.LoomField
loom.LoomFieldTest
loom.NetworkController
loom.NetworkControllerHelper
loom.NetworkOld
loom.NetworkSetupController
loom.NetworkStandardController
loom.NetworkTests

10. Scroll down again to **Enabled Visualforce Page Access** and click **Edit**.
11. Move each Visualforce page that starts with "loom." to **Enabled Visualforce Pages** (right side) and hit **Save**.

Enable Visualforce Page Access

Save

Cancel

Available Visualforce Pages

--None--

Add

Remove

Enabled Visualforce Pages

loom.Network
loom.NetworkLoad
loom.NetworkLoad
loom.NetworkTest
loom.Network_Setup
loom.SoniaTest
loom.yc_Account_Relationships
loom.yc_Account_Relationships_Old
loom.yc_Contact_Relationships
loom.yc_Contact_Relationships_Old

Troubleshooting/Frequently Asked Questions

What do I do if the Visualforce iFrame won't display on the contact page layout or the account page layout (i.e. the section on the page is blank)?

1. In **Setup**, under **Settings**, click **Security** and then **Session Settings**.
2. Under **Clickjack Protections**, check the box for "Enable clickjack protections for customer Visualforce pages with standard headers."
3. Click **Save** on the bottom of the page.



The screenshot shows the 'Clickjack Protection' section of the Salesforce Setup interface. It contains four checkboxes with corresponding information icons (i).

Clickjack Protection	
☒	Enable clickjack protection for Setup pages i
☒	Enable clickjack protection for non-Setup Salesforce pages i
☒	Enable clickjack protection for customer Visualforce pages with standard headers
☐	Enable clickjack protection for customer Visualforce pages with headers disabled i

Cross-Site Request Forgery (CSRF) Protection	
☒	Enable CSRF protection on GET requests on non-setup pages i
☒	Enable CSRF protection on POST requests on non-setup pages i