YURGOSKY

Loom

Features Guide for Lightning Experience

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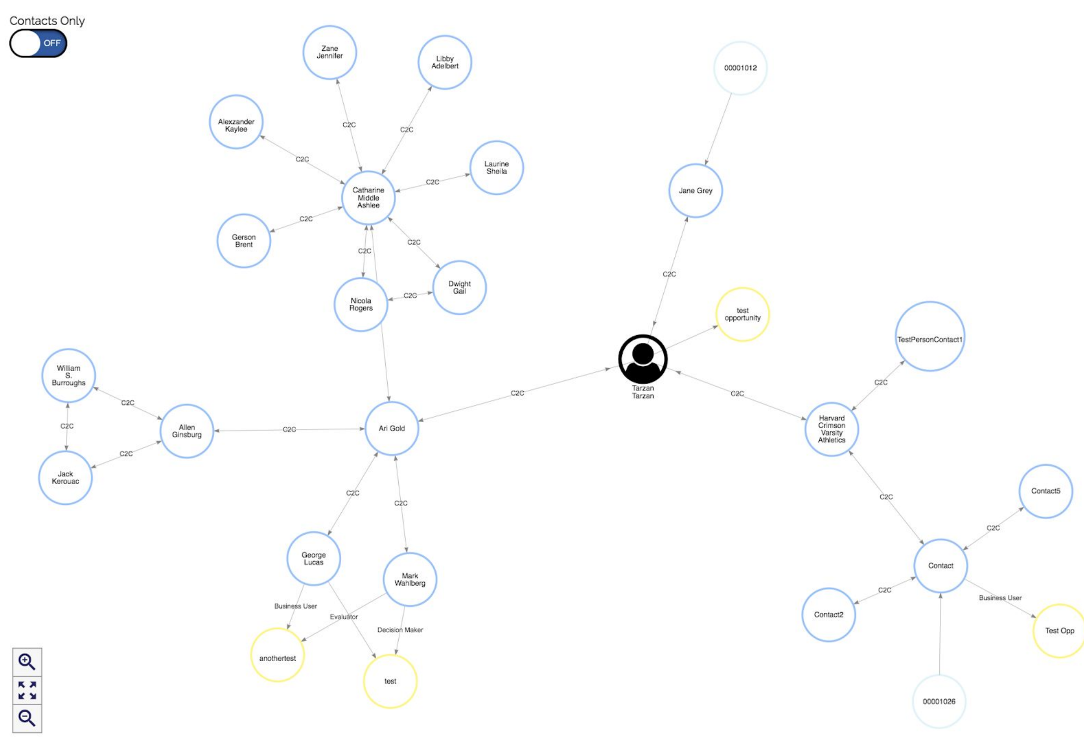
Loom Overview

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 using all of the Loom features and functionalities, with example use cases. This guide does not provide installation instructions or configuration help. For step-by-step instructions on how to install Loom and configure it for your organization's Salesforce instance, see the **Setup Guide**.



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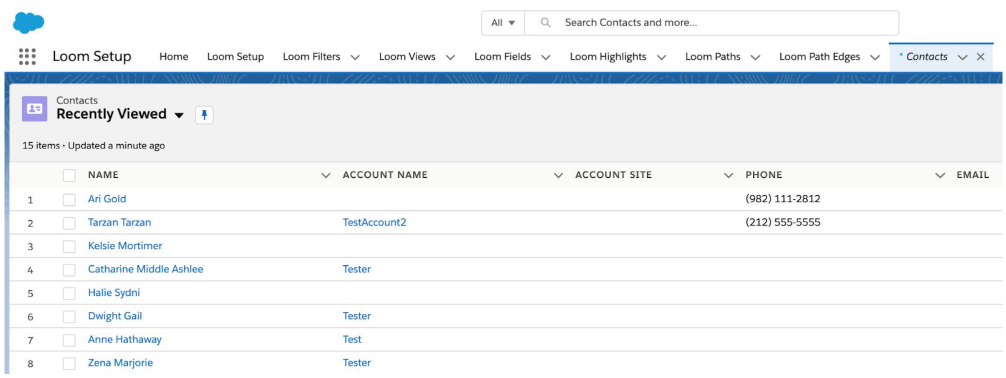
Loom Basic Functionality

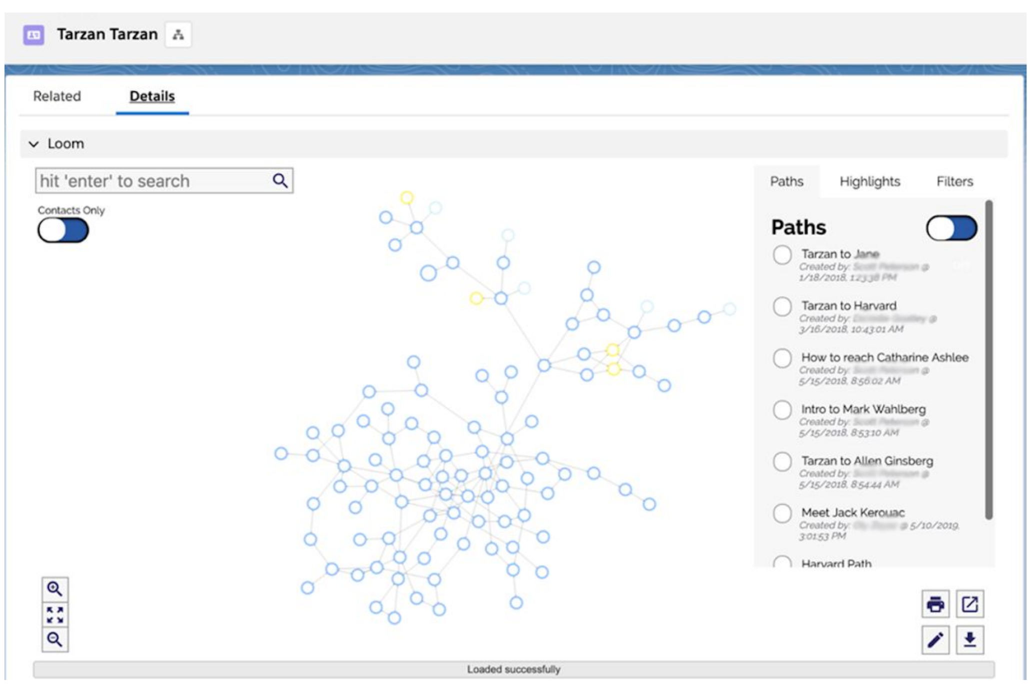
This guide will provide an in-depth review of how to use Loom-specific features, such as Loom Paths, Loom Highlights, and Loom Filters. However, it is helpful if you familiarize yourself with the basic functionality of the Loom visualization first. This is not a guide on how to add the Visualforce component to a page—please see the **Loom Installation and Setup Guide for Lightning Experience** for those instructions.

Where to Find Loom?

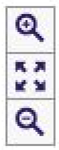
1. Go to the **App Launcher**.
2. Click on **Contacts** under "All Items."
3. Select a **contact record** that you want to make your main (home) node.



4. Once you're on a contact's record, you will find the Loom visualization under **Details.**



Zoom
To zoom in and out of the Loom visualization, use the tools clustered together in the bottom left of the Loom visualization that look like this:



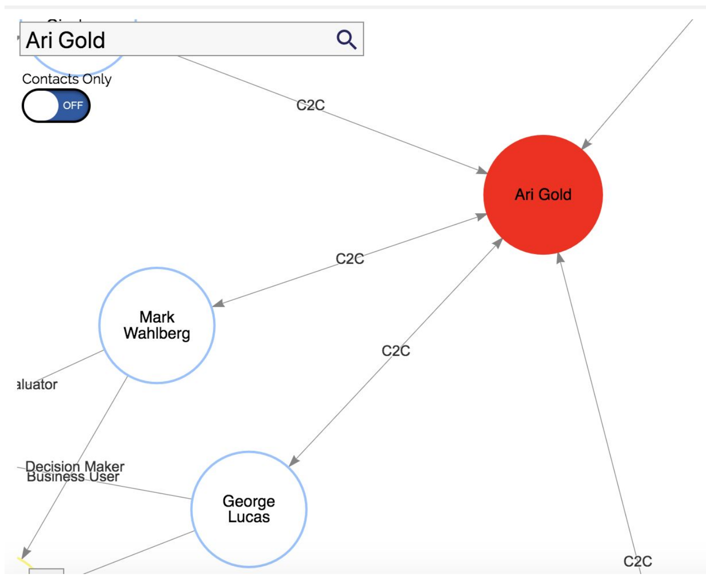
- To zoom in, click of the **magnifying glass** with the **+** sign on it (top). You can continue clicking until you have reached your desired amount of zoom.
- To zoom out, click of the **magnifying glass** with the **-** sign on it (bottom). You can continue clicking until you have reached your desired amount of zoom.
- To return to 100% zoom (original), click the **box with four outward arrow**s (middle).
- If you would like to focus on one portion of a large visualization, you can use your cursor to move the visualization around the page. To do so, click and hold on a **portion of the visualization that is not a Node**. You can then drag this around the screen.

Print and Export, Full Screen View
In order to export Loom, either as the visualization or the Node and Edge data driving the visualization, use the tools clustered in the bottom right of the Loom Visualization that look like this:

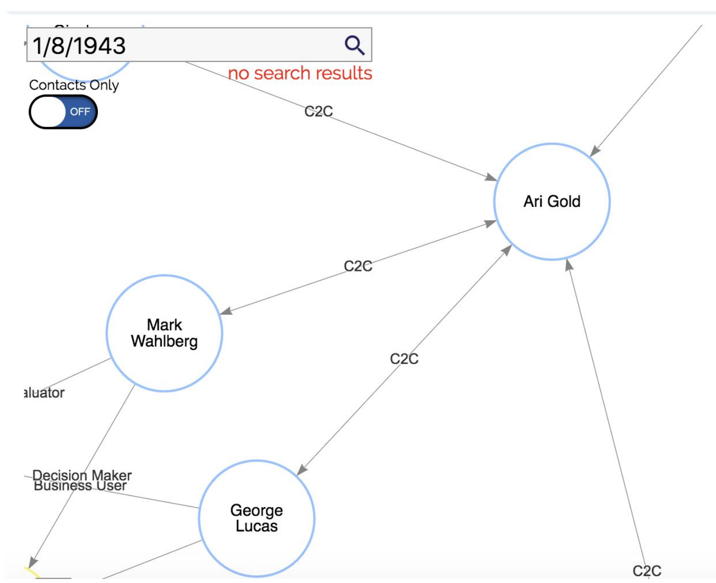
- To print the Loom visualization (the visual), click the **button that looks like a printer** (top left). This will open a print dialogue screen on your browser. From here, you may print to PDF or print to a physical printer.
- To export the Loom visualization into Excel, which will include Nodes, selected Edges, and selected Loom Fields, click the **download button** (bottom right). This will automatically download a file to your computer, which can be opened in Excel. This is useful for pivot tables or saving your Loom data for other uses.
- To make Loom full screen (no longer in the contact or account page layout), click the **button that looks like an arrow pointing up**. This will open a new tab with only the Loom visualization in your browser.

Search
Loom has a search box located at the top left of the Loom visualization. This search is useful to find records in larger visualizations with many Nodes.

1. To search, enter a search term in the search box and click the **magnifying glass** (or press **enter**). If your search term is found in the Loom visualization, the node will highlight in red.



2. If there are no results, red text indicating as such will appear under the search box.



3. It is important to note that the search ONLY works on the record label field (most likely the name) of Nodes. It does not work on Edges, Loom Fields, or other items located at the record level of a Node.

Loom Filters

Why use Loom Filters?
As you look at Loom visualizations, there may be many relationships displayed on the screen, overwhelming a user's ability to see and select the most promising path from one contact to another (or account to account, etc). Loom filters can help, by toggling certain objects from showing on the visualization page based on user determined values. For example, if you only want to see contacts with record type "donor," Loom filters would be an excellent way to narrow the number of nodes on your visualization, making it easier to find the ideal path to meet a high level program officer, by connecting through other donors.

How to set up Loom Filters

1. Go to **Loom Setup** in the AppLauncher in Salesforce.
2. Select the **Loom Filters** tab from the top tab list.
3. Click the **New** button.
4. From the filter-type drop-down, select which of four filter types you would like to use:
    a. **Degrees:** This filter allows you to select the number of degrees of connection between another node and the object selected.
    b. **Object Name:** This filters allows you to filter Nodes by object, eliminating objects that you do not want to appear on the Loom Visualization.
    c. **Field Value (static):** This filter allows you to filter by a static field on an object, only showing objects that do not match the criteria selected on the filter.
    d. **Field Value (selected):** This filter allows you to filter by a selected field on an object (for example, picklists), only showing objects that do not match the criteria selected on the filter.
5. Enter a name for your filter in the **Loom Filter Name** field.
6. Enter the **Object API Name** that you would like to filter on.
    a. If you do not know the Object's API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
7. If you are using a Field Value filter (static or selected) or a Degrees filter, in **Field API Name** enter the API name of the field you wish to filter on.
    a. If you do not know how to find the Field API name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed. Choose the **object you want to find the Field API name for** and go to **Fields and Relationships** to see the Field API.
8. **Target Text** input is variable based on the type of filter you are using:
    a. If you selected Degrees, leave this field "blank."
    b. If you selected Object name, type the "API name of the object."
    c. If you selected Field Value (static), type "Text to filter to."
    d. If you selected Field Value (selected), leave this field "blank."
9. Only use the **Target Number** field if you selected the **Field Value (static) filter** type and your static values are numbers. Enter the "number" to filter on in this text input.
10. When finished select **Save**.

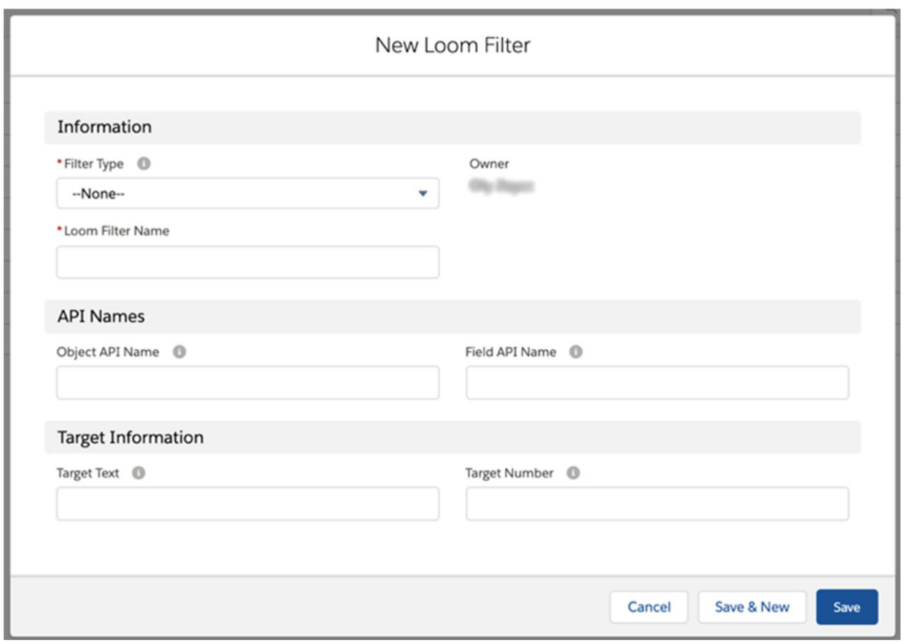
How to see filters on Visualforce page

1. Once you create a new filter, you can use your Loom Filter by going to a record's **Loom visualization**, under the contact record's **Details**, and selecting the **Filter** tab on the right-side navigation.
2. Click on the **hyperlink** of the filter name to enter your filter values (select field values in picklists, enter dates for date/range fields, etc.). Be sure to select **Apply Filters** to have your selections reflected on the Visualforce page.

Degree Filters

This filter allows you to control the number of degrees of separation between a Node and the filtered object. To set up a Degree Filter, please follow the instructions below:

1. Go to the **Loom Filters** tab.
2. Click the **New** button.
3. From the filter type dropdown, select **Degrees**.
4. Enter a name for your filter in the **Loom Filter Name** field.
5. Enter the **Object API Name** you would like to filter on.
    a. If you do not know the Object's API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
6. Leave the rest of the fields on the screen blank.



7. Select **Save**. You have now set up the degree filter.

To see and use the filter on a Loom visualization, go to an account or contact record with Loom added to the record's page layout.

1. At the top right of the *Details* section, select the **Filters** tab.

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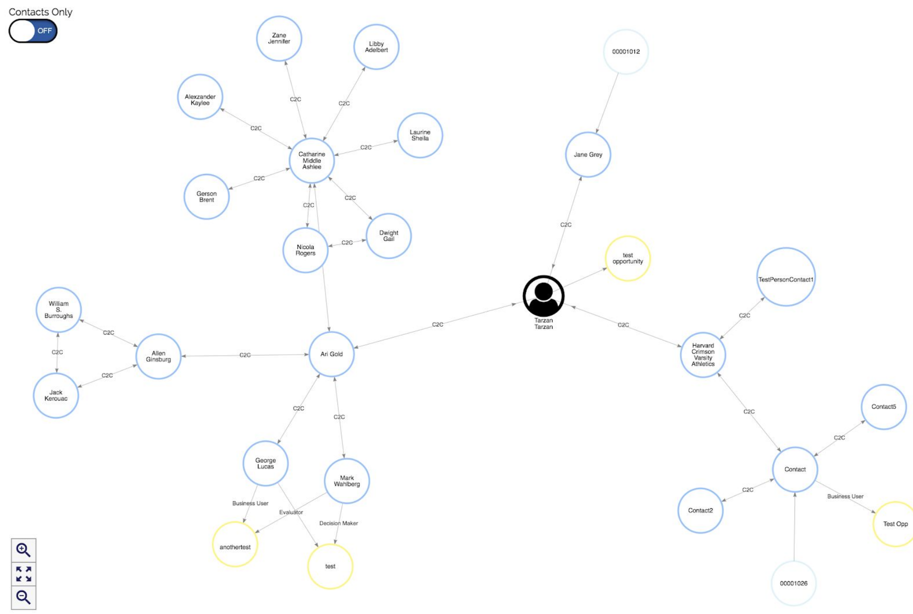
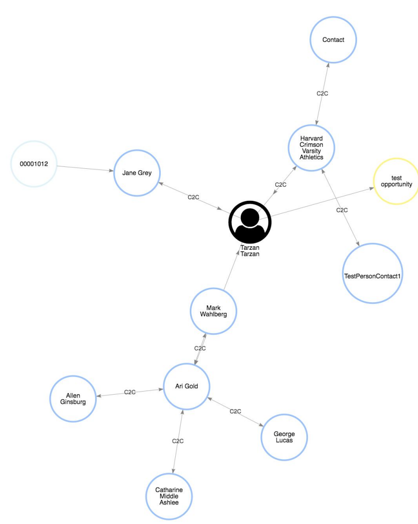
2. Click on the **name of your filter.** This will open a text box to input the number of degrees you would like to filter on.
3. Enter your “degrees of separation” number in the box, and then select the blue **Apply Filters** button.

Your Loom visualization will now be updated to reflect the number of degrees of separation you input.

Degree filter set at 3



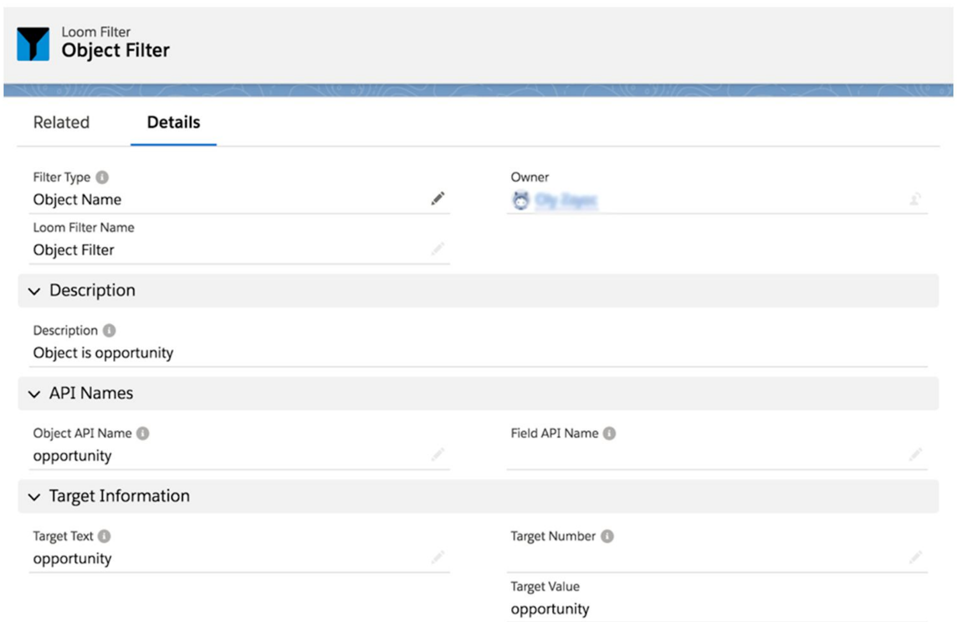
Degree filter set to 2



As shown in the above visualizations, changing the degree filter is a powerful way to increase or decrease the number of relationships seen between a contact/account and the selected object. This filter will also override the Default Degrees field on the Loom Setup tab.

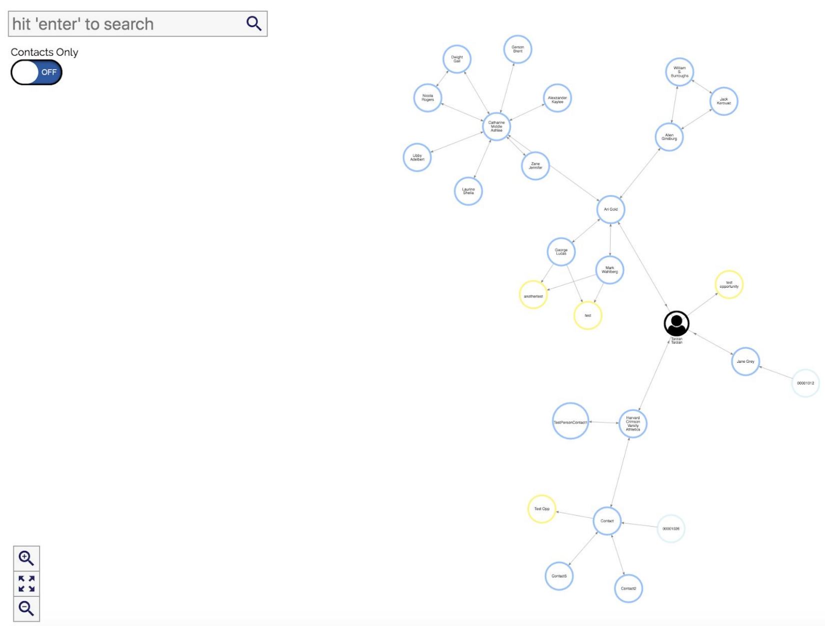
Object Name Filters
This filter allows you to filter objects so they will no longer be used as Nodes or Edges in your Loom visualization. To set up an Object Name filter, please follow the instructions below:

1. Go to the **Loom Filters** tab**.**
2. Click the **New** button.
3. From the filter type dropdown, select **Object Name.**
4. Enter a name for your filter in the **Loom Filter Name** field.
5. Enter the **Object API Name** you would like to filter on.
    a. If you do not know the Object's API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
6. In **Target Text**, enter the API name of the object you want to filter on.
7. Leave the rest of the fields on the screen blank.
8. Select **Save.** You have now setup the object name filter.

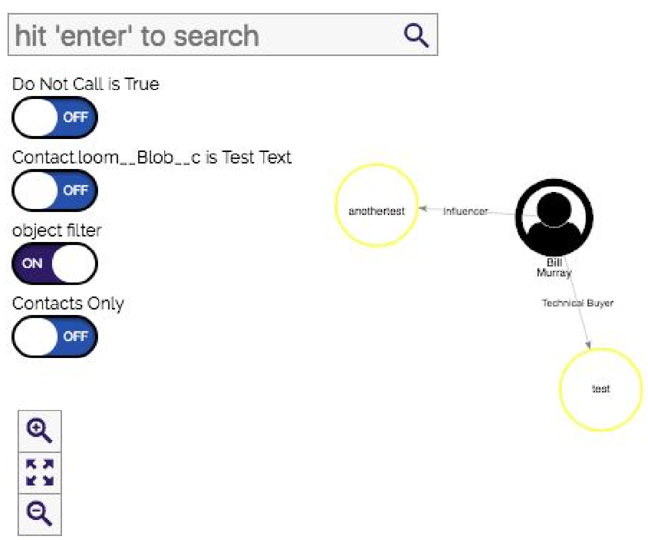


To see and use the filter on a Loom visualization, go to an **account** or **contact** record with Loom added to the record's page layout. On the top left of the page, under the Search bar, find the toggle for your recently created filter.

Because this filter is boolean, users can change the filter by toggling the filter on and off. This filter will not appear in the Filter tab.



Below is a picture of a Loom visualization with the Object Filter "ON."



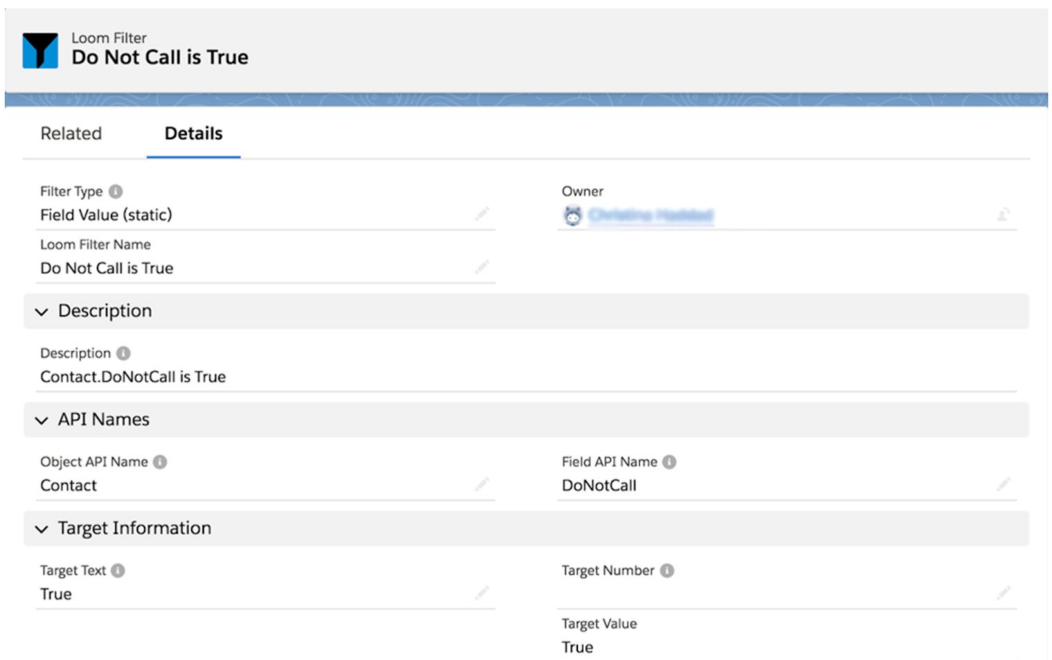
Changing which objects are displayed dramatically changes the Loom visualization. This can be helpful if a user wants to view an account's or contact's relationship with certain objects—such as excluding cases—in order to look at only contacts or accounts who have purchased products or given money.

Field Value (Static) Filters

This filter allows you to filter Loom Nodes and Edges by a field value on an object. To set up a Field Value (static) Filter, please follow the instructions below:

1. Go to the **Loom Filters tab.**
2. Select the **New** button on the top right.
3. In the filter type dropdown, select **Field Value (static).**

4. Enter a name for your filter in the **Loom Filter Name** field.
5. Enter the **Object API Name** you would like to filter on.
    a. If you do not know the Object's API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
6. Enter the **Field API Name** for the field you would like to filter on.
    a. For a Field Value (static) filter, the field must be filtered by a static field value (i.e. you are filtering based off of one field value, such as "sex," "ethnicity," or "industry").
    b. If you do not know how to find the Field API name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed. Choose the **object you want to find the Field API name for** and go to **Fields and Relationships** to see the Field API.
7. If the value your are filtering is text, enter the text you want to filter on in the **Target Text** field and leave the **Target Number** field blank.
8. If the value you are filtering on is numeric, enter your "value" in the **Target Number** field and leave the **Target Text** field blank.

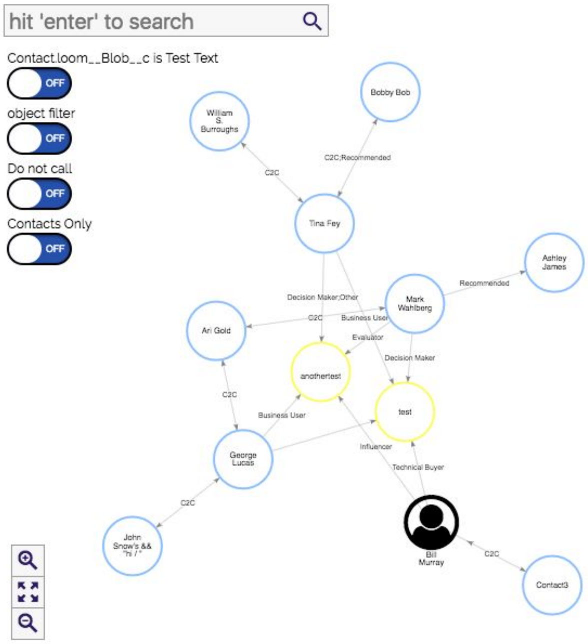


9. Select **Save**. You have now setup the field value (static) filter.

To see and use the filter on a Loom visualization, go to an **account** or **contact** record with Loom added to the record's page layout. On the top left of the page, under the Search bar, find the toggle for your recently created filter.

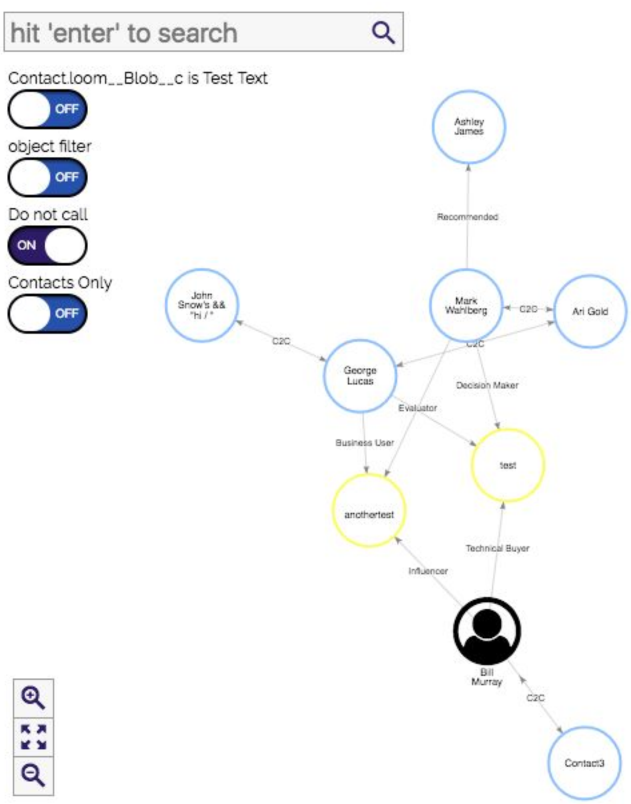
Because this is a boolean filter, with the filter either being ON (filtering out contacts with Do Not Contact equals true) or OFF (showing all contacts, regardless of the field on Do Not Contact), this filter shows up in the toggles on the left.

“Do not call” filter turned off



“Do not call” filter is turned “on”

Notice that Tina Fey, and her connected Nodes, who have “Do Not Call” checked on their contact records, do not appear.

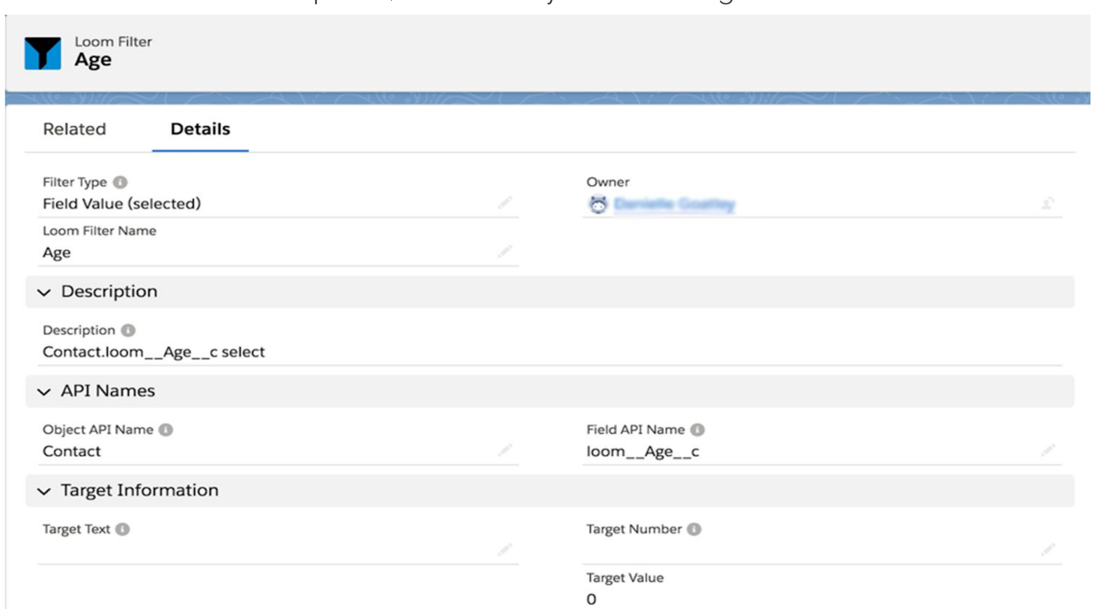


As shown in the above visualizations, using a Field Value (static) filter is a quick and easy way to ensure that what is being displayed on Loom visualizations is useful and conforms to your organization's business needs. If, for example, you are looking for lawyers in your organization's network, it might be helpful to filter by an Occupation field, and only show individuals who fit the profession you are looking for in that use case.

Field Value (Selected) Filters

This filter allows you to filter Loom Nodes and Edges by field values on an object. To set up a Field Value (selected) Filter, please follow the instructions below:

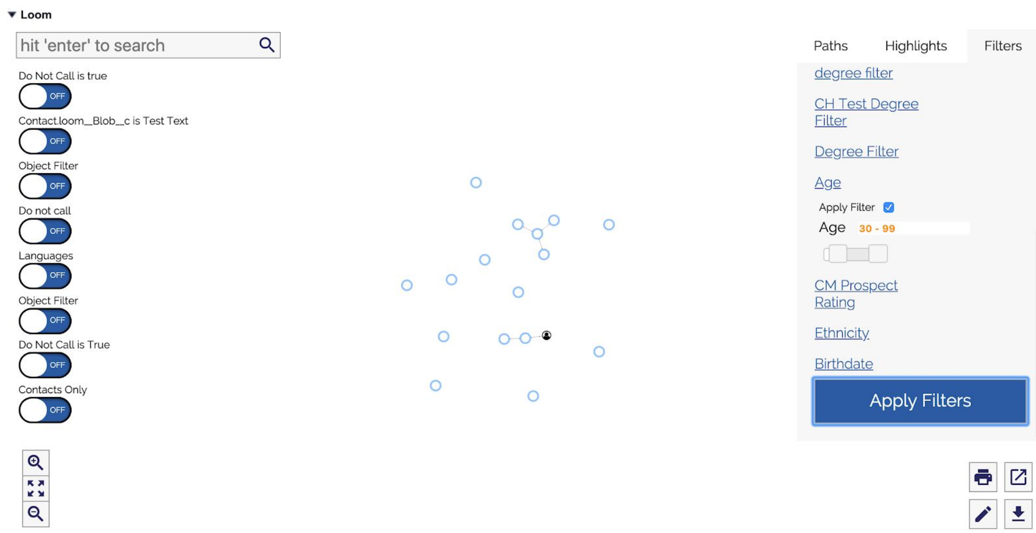
1. Go to the **Loom Filters** tab**.**
2. Click the **New** button at the top-right.
3. In the filter type dropdown, select **Field Value (selected)**.
4. Enter a name for your filter in the **Loom Filter Name** field.
5. **Input the Object API name** you would like to filter on. In this example, I will use contacts, as I am filtering by a field on a contact (API name Contact). Please see the general filter instructions if you do not know how to find an object's API name.
    a. If you do not know the Object's API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
6. Enter the **Field API Name** for the field you would like to filter on. For a Field Value (selected) filter, the field can be any type of field ("date," "numeric," "picklist," etc.). In general, text fields are not ideal for filtering on, but can be used in certain cases.
    a. If you do not know how to find the Field API name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed. Choose the **object you want to find the Field API name for** and go to **Fields and Relationships** to see the Field API.
7. Leave the remaining two fields, **Target Text** and **Target Number**, "blank." This filter will show all of the field options, and allow dynamic filtering in the Loom visualization.



8. Select **Save**. You have now setup the field value (selected) filter.

To see and use the filter on a Loom visualization, go to an **account** or **contact** record with Loom added to the record's page layout through **Salesforce App Launcher.**

9. Go to the **Filters** tab at the top right of the Loom visualization.
10. Find your filter, which in this example, is called "Age." Click on the **field name**, which will open a numeric range input box and slider.
11. Change the age range to your desired selection, in this case, ages "38 to 68." Once you move the slider or input a new range, the **Apply Filter** checkbox will check off.
12. Click the big blue **Apply Filters** at the bottom of the section. This will apply your filter to the Loom visualization.



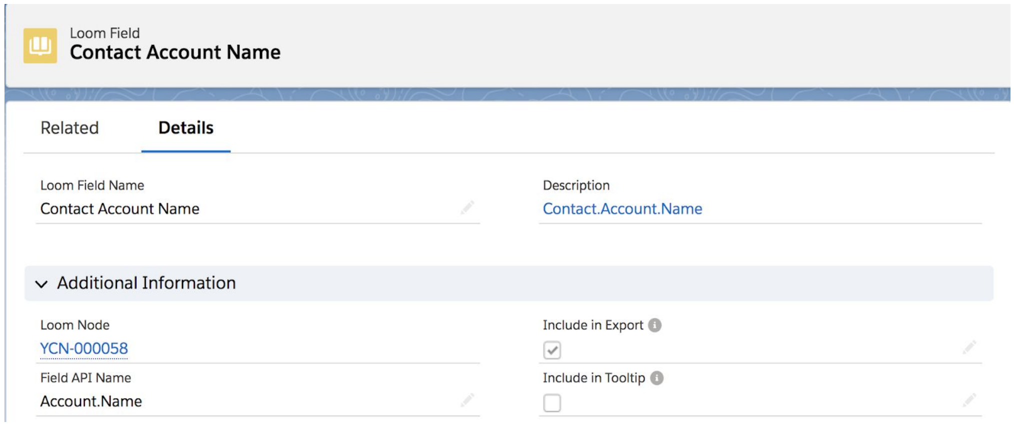
Loom Fields

Why use Loom Fields?
In addition to Nodes and Edges, it may be useful to see additional information stored in Salesforce about a record in a Loom visualization or Excel export without having to navigate back to the Salesforce record. In these cases, you can use Loom Fields to add commonly used Salesforce fields on objects in the Loom visualization or Excel export.

How to set up Loom Fields
Loom does not come pre-configured with any Loom Fields setup, as the fields organizations find useful vary greatly based on specific use cases for Loom. In order to configure a Loom field, please follow the instructions below.

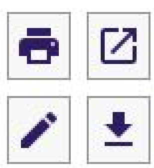
1. Navigate to the **Loom Fields tab** in the Loom Setup app.
2. Click the **"New"** button in the top right of the page.
3. Enter a name for your field in the **Loom Field Name** field.
    a. In this example, we are going to show a Contact's phone number, with the **Loom Field Name** of "Contact Phone," which would be useful if using Loom to display a network of potential sales targets, for example.
4. Enter the **Loom Node** that the field should be on.
    a. You will need to use the Node name, which starts with "YCN-######."
    b. If you do not know which Loom Node corresponds with the correct object, navigate to the **Loom Setup** tab. In this example, we will put the Contact Phone Number on the Contact Node, which is Loom Node "YCN-000058" in our demo Salesforce instance (see screenshot below in step #9).
5. Enter the **Field API name**. Since we are using Phone Number, the Field API Name is "Phone."
6. Check the box **Include in Export** if you want this field to be included in Excel exports of Loom.
    a. If you are not sure, there is no harm in checking off the box, aside from making your Excel export larger.
7. Check the box **Include on Tooltip** if you want to display the field on the Loom Visualization page when a user hovers over a Node of the selected type.
    a. If this is a field that users will need to access frequently, it is best to check this box.
    b. Keep in mind that you do not want the hover to contain too many fields, so limit the number of fields displayed on the hover for each Node type to "3-4."
8. Once you have made your selections, click **Save.**

Your Loom field record should look something like this:

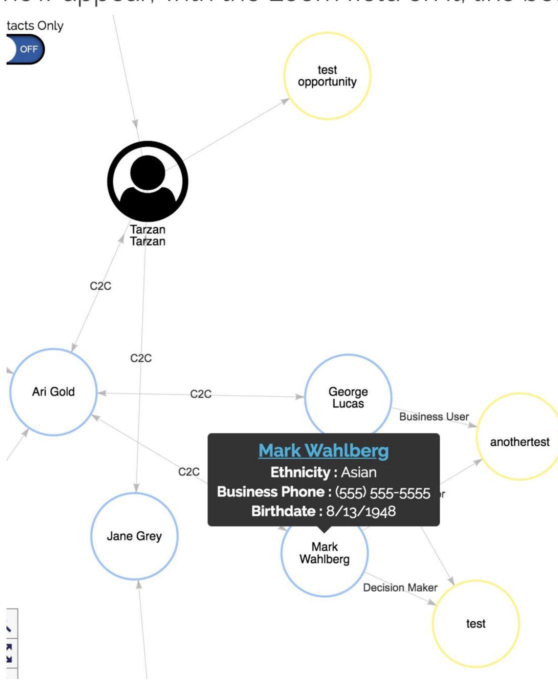


How to Use Fields

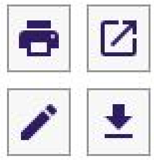
1. To see the Loom Field on your Loom visualization, navigate to an **account** or **contact** record with Loom included in the page layout.
2. Click the **pencil icon** on the bottom right of the Loom page section.



3. Hover over a Node type that you added a Loom field for. In this example, hover over a contact, to view the Contact Phone field on the contact node. A popup box should now appear, with the Loom field on it, like below:



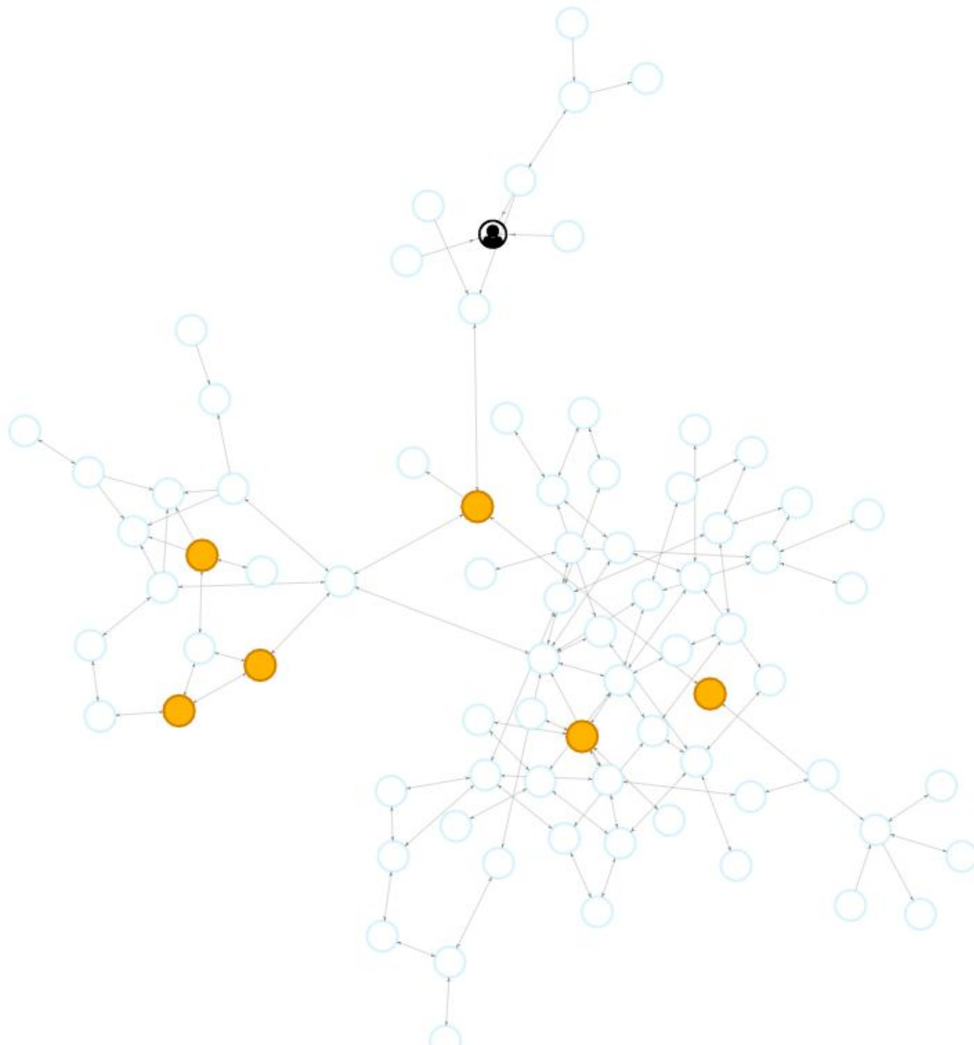
4. To see the Loom field in Loom visualizations exported to Excel, click the **downward facing arrow** on the bottom right tool section.



5. The report will now download in your browser. Open the Excel report, which will have the Loom field in one of the columns.
6. Feel free to repeat this process to add any desired fields on the Loom visualization and/or Excel exports.

Loom Highlights

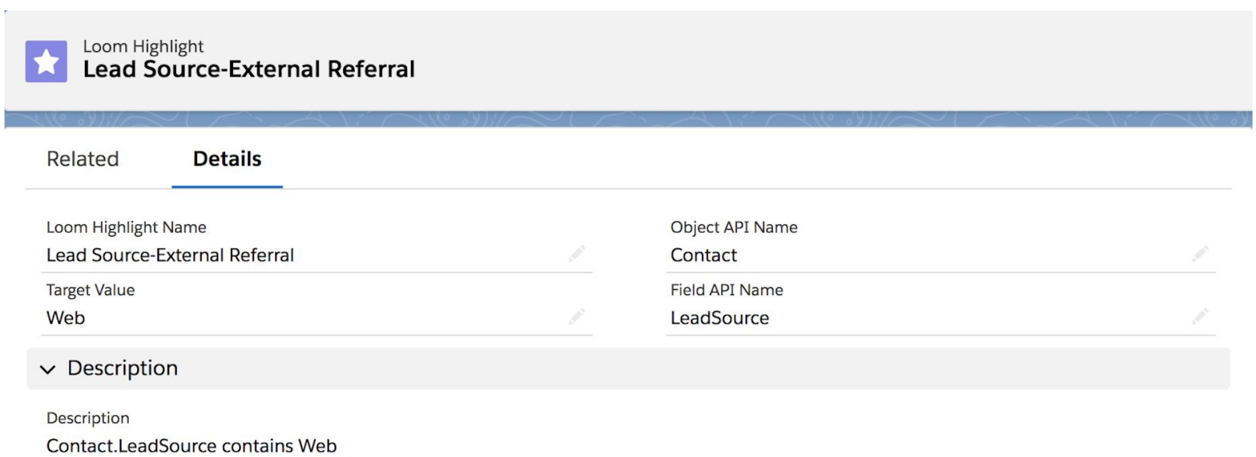
Why use Loom Highlights?
Loom Highlights allows a user to visually identify records that meet specific criteria in relation to other records (either Nodes or Edges). For example, if a user wanted to see every contact that had a specific record type, such as Major Donor, in relationship to other connected people and organizations, they could use Loom Highlights to change the color of all Nodes that met that contact record type criteria.



How to set up Loom Highlights
In order to create a new Loom Highlight on any Loom visualization, follow the instructions below:

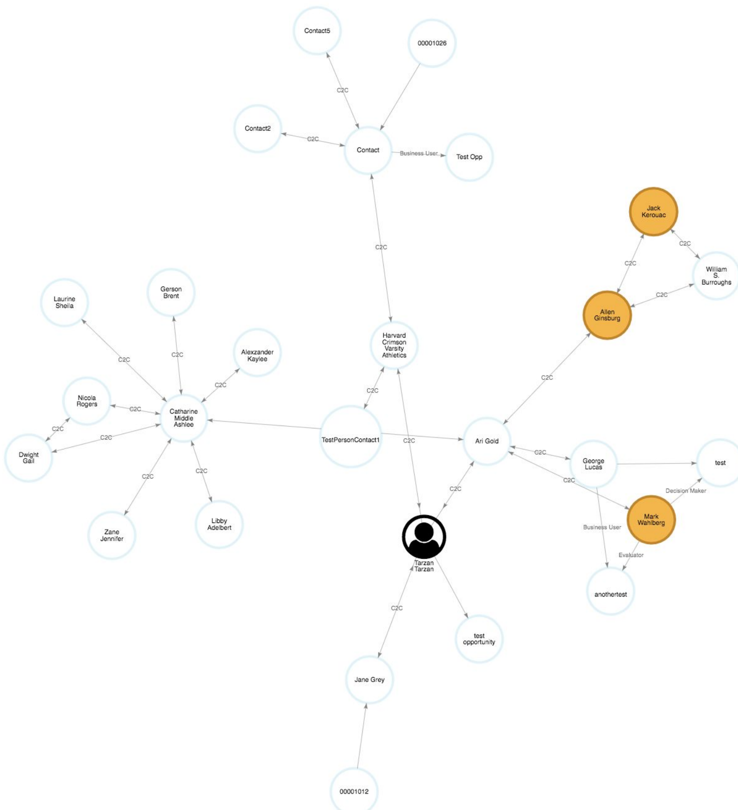
1. Go to the **Loom Highlights** tab in the Loom Setup application.
2. Click the **New** button.
3. Enter a name for your highlight in the **Loom Highlight Name** field.

    a. In this example, we will highlight contacts that were captured as leads through external referrals. We will call the highlight “Lead Source-External Referral.”
4. Enter the **Object API Name** you would like to filter on.
    a. If you do not know the Object’s API Name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed, along with their Object API Name.
5. Enter in the **Field API Name.**
    a. If you do not know how to find the Field API name, go to **Setup | Platform Tools | Objects and Fields | Object Manager.** You will see all standard and custom objects listed. Choose the **object you want to find the Field API name for** and go to **Fields and Relationships** to see the Field API.
    b. While you can only create a Loom highlight on one field at a time, you can use filters additively. For example, if you wanted to highlight two lead sources, you could create another filter for “Phone Call” and apply both filters to one Loom visualization.
6. Enter the **Target Value** field**.** This is the text that you want the field to match in order to be highlighted.
7. Your Loom highlight record should now look something like this:



How to use Loom Highlights

1. Now that you have created a Loom Highlight, you can use it on your Loom visualization. Go to a **contact** or **account** that would have related objects that match your Highlight.
2. On the top right of the Loom visualization, click on the **Highlights** tab.
3. The newly created highlight should be at the bottom of the list of Loom highlights created in this instance. Click the **circle on the left side of the Highlight’s name** to turn on the filter.
4. Here is a Loom visualization with the Loom Highlight on:



5. To turn the Highlight off, toggle the **on/off toggle** next to *Highlights*.

Loom Views

Why use Loom Views?
Organizations use Loom for a variety of reasons, including fundraising, recruitment, advocacy and sales. Often there are a variety of Loom filters and Loom Edges set up for each use case in order to view certain relationships and relevant information. Loom Views allows you to save specific configurations for filters, edges, and degrees.

How to set up Loom Views
To setup a new Loom View, follow these instructions:

1. Go to the **Loom Views** tab at the top tab list in the Loom Setup app.
2. Enter a name for your View in the **Loom View Name** field.
3. Enter the default number of degrees in the **Degrees** field. If unsure, we suggest "3" to "4" degrees as a default.
4. Click **Save**.
5. To add Loom Filters to a Loom View, click **New Loom View Filter**.
    a. Add the Loom Filters (via Lookup) you want to add to the Loom View.
    b. Click **Save** once finished.
    c. You can repeat this step multiple times to add multiple filters to one view.
    d. You should not change the lookup for Loom View, unless you want to change the view that you are adding a Loom Filter to.
6. Click **Save**.
7. To add Loom Edges to a Loom View, click **New Loom View Edge**.
    a. Add the Loom Edges (via Lookup) you want to add to the Loom View.
    b. Click **Save** once finished.
    c. You can repeat this step multiple times to add multiple edges to one view.
    d. You should not change the lookup for Loom View, unless you want to change the view that you are adding a Loom Edge to.
8. Click **Save**.

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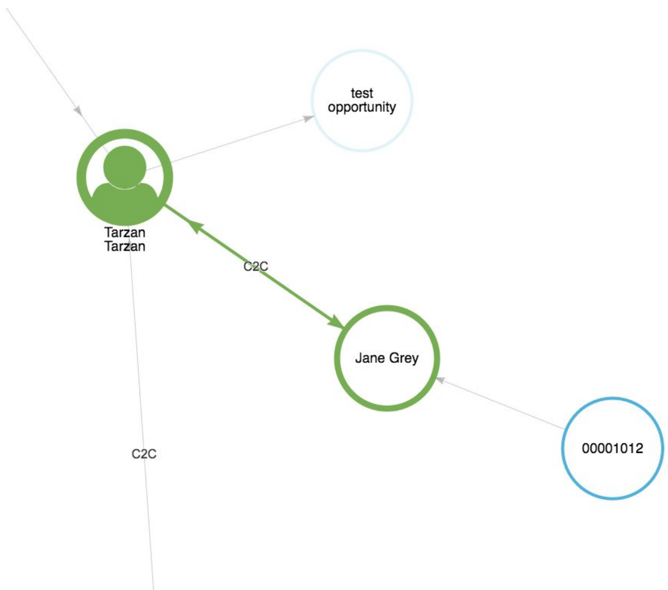
Loom Paths

Why use Loom Paths?
In addition to simply viewing relationships and connections between people and organizations, Loom Paths allow a user to identify an optimal path (or paths) to connection for a particular target. Users can save paths on different Loom visualizations to help develop strategies for engagement and share with others.

How to create a Path

1. Double click on the **Center Node**, which is the record in which you are creating the Loom visualization. This is your starting point. You will now be entered into Path Mode.
2. The Nodes that you can connect Node 1 to are now highlighted in turquoise.
3. Select **one of the turquoise node options** by clicking on that **Node**. This is Node 2.
4. Node 2 is now outlined in green, along with the Edge that connects Node 1 and Node 2. A new set of Nodes is now turquoise, indicating that they can be connected to Node 2.



5. Select **one of the turquoise node options** by clicking on that **Node**. This is Node 3.
6. Continue this process until your desired path is complete. *Your Path MUST include the center Node as the start or end point.*
7. Click the **Save Path** button at the bottom right of the screen.
8. Give your Path a short, descriptive name (30 character limit) and click **Save Path**.
9. If the Path saved successfully, it will appear as a hyperlink as the bottom of the Path tab on the top right of the Loom visualization. Clicking on the **hyperlink** will take you to the Path record.
10. When are you finished using Path Mode, click **Clear & Exit** on the bottom right. This will exit Path Mode and you will lose any unsaved Paths.

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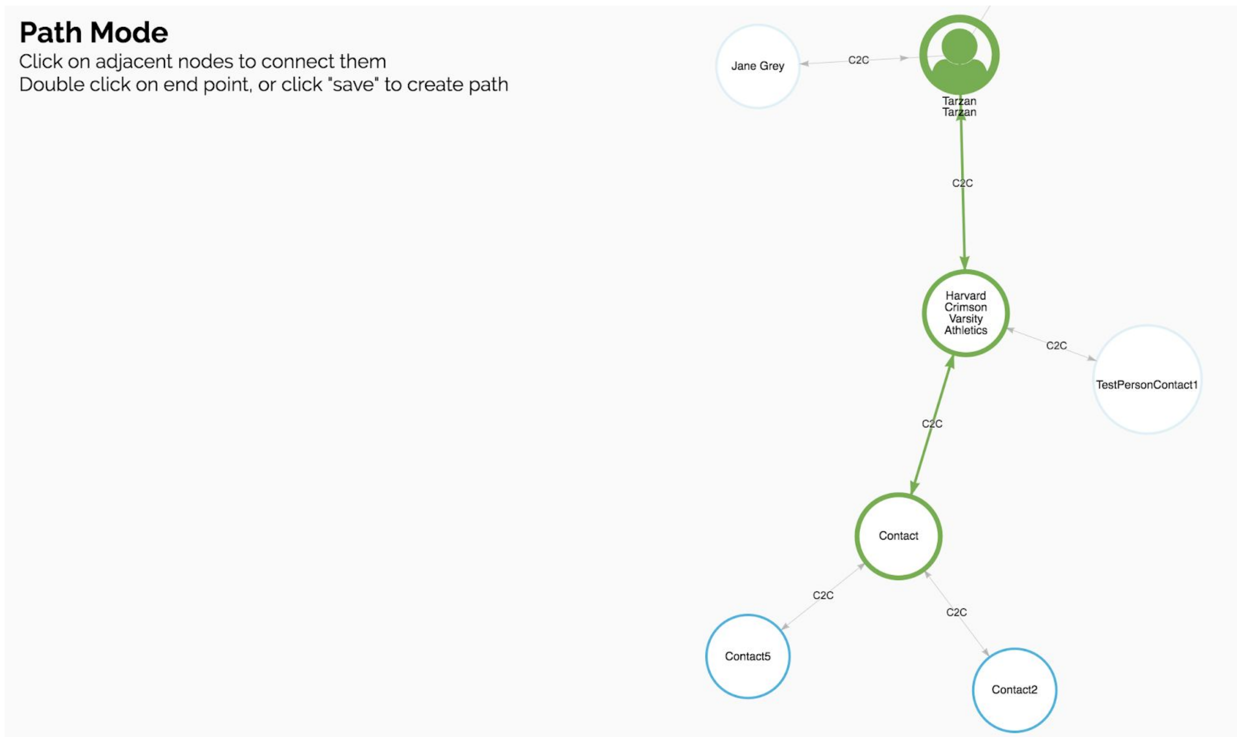
How to display saved Loom Paths

1. Go to the record where your Loom visualization is saved. *Loom Paths will only show up on the Loom visualizations of the starting or ending Node, not intermediary Nodes.*
2. On the **Paths** tab on the top right of the Loom visualization, click the **circle next to the path that you would like to turn on.**
3. Your path is now highlighted in green on the visualization.



4. To turn the Path off, **click the purple section of the toggle button on the Paths tab.**

Loom Path Edges

Why use Loom Path Edges?
Loom Path Edges are the individual segments that connect Node 1 to Node 2, Node 2 to Node 3, and so on, in a Loom Path. These individual segments allow you to modify Loom Paths after they have been created.

You can view Loom Path Edges one of two ways. The instructions for both are below.

Via Loom Paths
To find a Loom Edge via the associated Loom Path, use the following instructions:

1. Go to the **Loom Paths** tab at the top tab list in the Loom Setup app.
2. Click on the **Loom Path Name** of a Path that was previously created.
3. This will open the record for the Loom Path. On the Loom Path, there will be a related list called Loom Path Edges.
4. Click on the **Loom Path Edge Name** for the specific Edge that you would like to look at. This will open the Loom Path Edge record.

Via Loom Path Edges
Loom Path Edges can also be found on the Loom Path Edges tab. To do so, use the following instructions:

1. Go to the **Loom Path Edges** tab in the Loom Setup app.
2. Find the **Path** that your **Loom Path Edge** is associated with.
3. Then, find the specific Path Edge in your Path using identifiers such as "From Name" and "To Name," which represent the endpoints of a specific Path.
4. Once you have found the correct Path Edge, click on its **Loom Path Edge Name**. This will open the Loom Path Edge record.

How to Modify Loom Path Edges
From the Loom Path Edge record, you may modify or delete the record.

<u>Delete</u>
1. From the Loom Path Edge record, click the **Delete** button at the top right of the page.
2. This will permanently delete your Path Edge. You should not delete Path Edges in the middle of a Path (not Target to Node or Center Node to Node).

<u>Modify</u>
1. From the Loom Path Edge record, click the **Edit** button at the top right of the page.
2. From this page, you can reorder steps (steps must always be sequential) through the Step field.
3. From this page, you can also change the "To Record" or the "From Record." This changes the endpoint of a specific Path Edge. To change either of these fields, enter the new "ID number" for the record you would like to go to (this record must also be a Node).
    a. You must use a record's "18 digit unique record ID," not the 15 digit record ID.

   b. If you do not know how to find this ID, please see this help article provided by Salesforce.
4. Once you enter the "Record ID number," the To/From Name field will auto-populate.
5. Select **Save**.
6. Your Loom Path now has a new Edge.