

Salesforce – Conga Composer Integration

The Context

- Conga Composer enables Salesforce customers to customize, streamline and scale document generation and reporting for Salesforce. Composer can automatically populate richly formatted templates with data from any standard or custom object in Salesforce and send it via a variety of delivery options.
- The administrator configures Composer Solutions for end-users to run Composer from a button or link on an object in Salesforce. The administrator decides what Salesforce object data to leverage, create the document templates, dictates formatting, and determines the customization options available to end-users. End-users can then click the button to run the solution.
- The administrator can allow end-users to make selections, such as which template to use for the final merged files, or pre-select templates and other options and run the solution entirely in the background, and also automate solutions using Salesforce workflows or on a schedule using Conga Batch and Conga Trigger.
- Once documents are created, Composer can also allow you to email documents, send documents for eSignature, or store the documents in services like Box, Google Drive, or OneDrive for safekeeping.



- With the ability to predefine everything from templates and email recipients to activity logging and output file storage, Composer transforms complex routines into single button clicks.

What Does Conga Composer do?

- Conga Composer makes it easy to create and deliver sophisticated documents, presentations, and reports from Salesforce by automatically populating richly formatted templates with data from any standard or custom object.
- **Create** - Conga Composer offers document generation capabilities to create virtually any important document, report, or presentation using Salesforce data. Placing a custom button or link on any object's page layout gives you immediate access to all its fields. Salesforce reports or SOQL queries can retrieve any additional required data from as many as 50 other objects or lists.
- **Distribute** - Conga Composer offers a variety of options for downloading, storing, and delivering your output files:
 - Immediately downloaded
 - Saved directly in Salesforce, Google Drive®, or SpringCM®
 - Automatically emailed
 - Sent for eSignature
- **Automate** - Composer doesn't just produce and deliver documents – it automates entire business processes. Use parameters to control the behavior of your Composer button and streamline the user experience. You have a wide variety of options – preselect up to 10 templates to generate one or more output files, use parameters to restrict options in the user interface, or enable background mode to bypass it entirely.

Approach

Anatomy of a Conga Composer Button

There are two types of Composer buttons: **non-OAuth** and **OAuth** (Open Authorization).

- **Non-OAuth Buttons** - All non-OAuth Conga Composer® URLs start the same way. The first three lines are identical in every Composer URL, and the fourth line is customized to identify the Master Object from which you'll be gathering data and running the solution. These first lines are referred to as the Base URL, which looks like this:

- `https://composer.congamerge.com`
`?Session ID={!API.Session_ID}`
`&ServerUrl={!API.Partner_Server_URL_210}`
`&Id=`

- **OAuth Buttons** - OAuth (Open Authorization) is a different security protocol that is required for all Conga Composer buttons created in the Salesforce Lightning user interface. The Base URL of an OAuth button looks like this:

- `/apex/APXTConga4__Conga_Composer`
`?serverUrl={!API.Partner_Server_URL_370}`
`&id=`

- In both button types, the `&Id=` parameter (or `&id=` in the OAuth button) defines your master object – the Salesforce® object from which you will launch your Composer solution. The value of this parameter will always be the ID of your master object. For example:

To launch the solution from this type of object:	The fourth line would contain:
Account	&id={!Account.Id}
Opportunity	&id={!Opportunity.Id}
Case	&id={!Case.Id}
A custom object	&id={!CustomObjectName_c.Id}

Composer Parameters

- After the Base URL, you will see the Composer parameters that have been added to the Composer solution (assuming they have been added by the Conga Admin). Parameters are settings that control the behavior of your solution. They always use the following convention:

&ParameterName=Value

- In the example below, you can see seven parameters have been added to this Composer button URL:

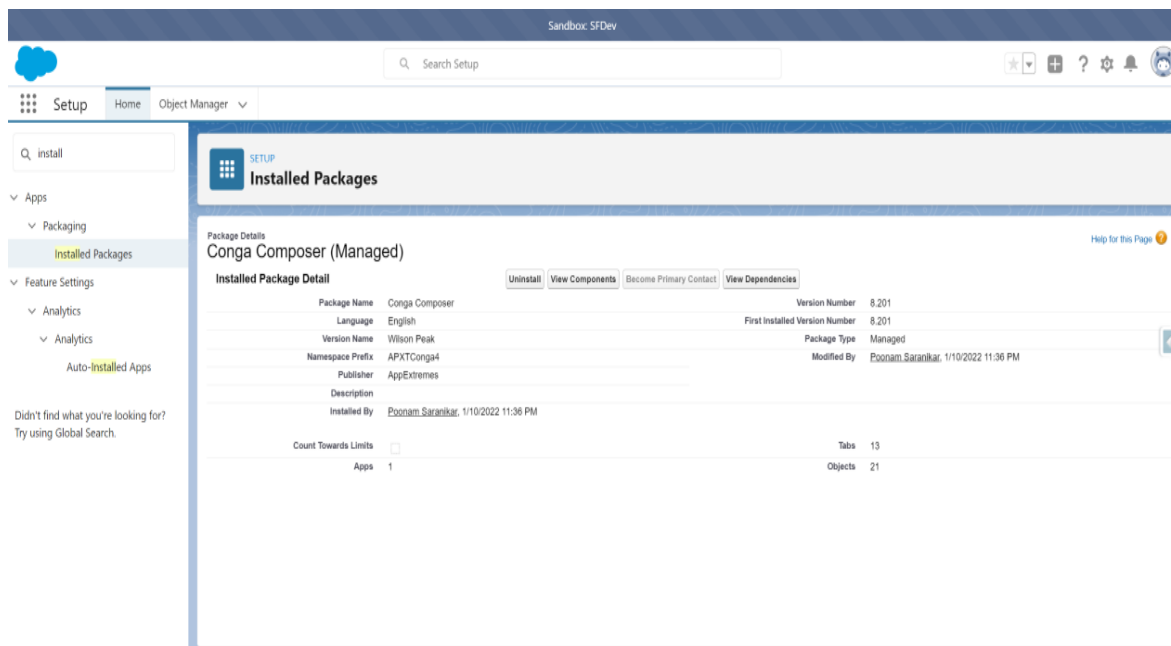
```
https://composer.congamerger.com?SolMgr=1
&session ID= {! API.Session_ID}
&serverUrl= {! API.Partner_Server_URL_290}
&Id={!Opportunity.Id}
&Template ID=a0436000001AbCp
&CongaEmailTemplateId=a0236000001gl7C
&Template Group=Invoice
&DefaultPDF=1
&OFN=Conga+Invoice+-+{!Opportunity.Name}+-+{!Today}
&SC0=1
&SC1=Attachments
```

- The parameters in this example control template selection, output file type, output file name, and where to save a copy of the output document. For more information about parameters, see [Customizing Composer with Parameters and the Parameter Guide](#).

- **How to Populate Parameter values?** - There are three ways to populate parameter values:
 - Type the value into the parameter (using Solution Manager or manually).
 - Using a Salesforce merge field (such as `{!Opportunity.Id}`, which will dynamically update with a value when the solution is run.
 - Using a Qvar, which allows you to retrieve data with a Conga Query and then pass that data to another parameter to use as the value.

Installing Composer from the Salesforce AppExchange

- **Conga Composer Technical Requirements** – [Go through Conga Composer Technical Requirements](#) for supported browser and internet details.
- **To install Conga Composer** – Follow below steps:
 - Install Conga Composer into your Salesforce instance by [visiting our listing on the AppExchange](#).
 - Click **Get It Now** and follow the on-screen prompts to install Conga Composer.
 - Log in to the AppExchange.
 - Specify where you want to install Conga Composer.
 - Click Install in production to install in your production instance.
 - Click Install in sandbox to install in a sandbox.
 - Read and accept the terms and conditions.
 - Select the I have read and agree to the terms and conditions box.
 - Click Confirm and Install.
 - As a best practice, and to avoid access issues for end-users Conga recommends selecting Install for All Users. Then click Install.
 - Once the package is installed, to check the package in Salesforce follow the below steps: Click on setup-> In quick find search for 'Install package' -> Click on 'Install package'.



- **What's in the Composer Package?** – To view component and object of Conga composer please go through [Composer Package](#) details.

Assign User Licenses

- When installing Conga Composer from the AppExchange, the default license count upon installation is 10, one of which is assigned to the administrator who installed Composer.
- To assign the remaining licenses for Conga Composer
 - Navigate to the Installed Packages in Salesforce Setup.
 - Click Manage Licenses next to Conga Composer.
 - Click Add Users.
 - Select the box to the left of names of the users who need access to Conga Composer.
 - Click Add to add the selected users.
 - Click Add Users to save changes.

Permissions Needed to Use Composer

User permissions and access settings are specified in profiles and permission sets. Every user is assigned only one profile, but can also have multiple permission sets. When determining access for your users, use profiles to assign the minimum permissions and access settings for specific groups of users. Then use permission sets to grant more permissions as needed.

- **Configuring Profile Permissions** –
 - When installing Conga Composer from the AppExchange, select Install for **All Users**. If you did not initially install Composer for all users, you will need to modify the field level security for each field on the custom Conga Objects.
 - To edit Profile permissions, navigate to **Setup** → **Manage Users** → **Profiles**.
 - For every Profile that runs Composer:
 - Minimum of **Read Access to all custom Conga Objects** (Conga Email Templates, Conga Global Merges, Conga Queries, Conga Solutions, Conga Solution Email Templates).
 - Minimum of **Read Access to ALL Objects and Fields included in the merge templates** (keep in mind the most restrictive settings apply, so if a user has visibility to a field but not the Object, they will not be able to merge data from that field). Minimum of Create permission to the Documents Object is needed if the user is going to utilize email functionality in Composer.
 - Check **API Enabled** under Administrative Permissions.
 - Check **Run Reports and Export Reports** (if you are using reports with your Composer solutions) and also ensure the report folders that contain your Composer reports are shared with end-users.
 - Configure **Composer as a Connected App** for any Profiles that will use the OAuth button (this is required to use Conga Composer in the Salesforce Lightning interface).
 - If you save output data to chatter, update System Settings to check **Moderate Chatter**.
 - Enable Custom Setting Definitions Access
 - Composer
 - **Conga Composer.APXTConga4.Conga Composer Settings**
 - **Conga Composer.APXTConga4.Conga Solutions Settings**
 - Enable Custom Metadata Type Access
 - Composer

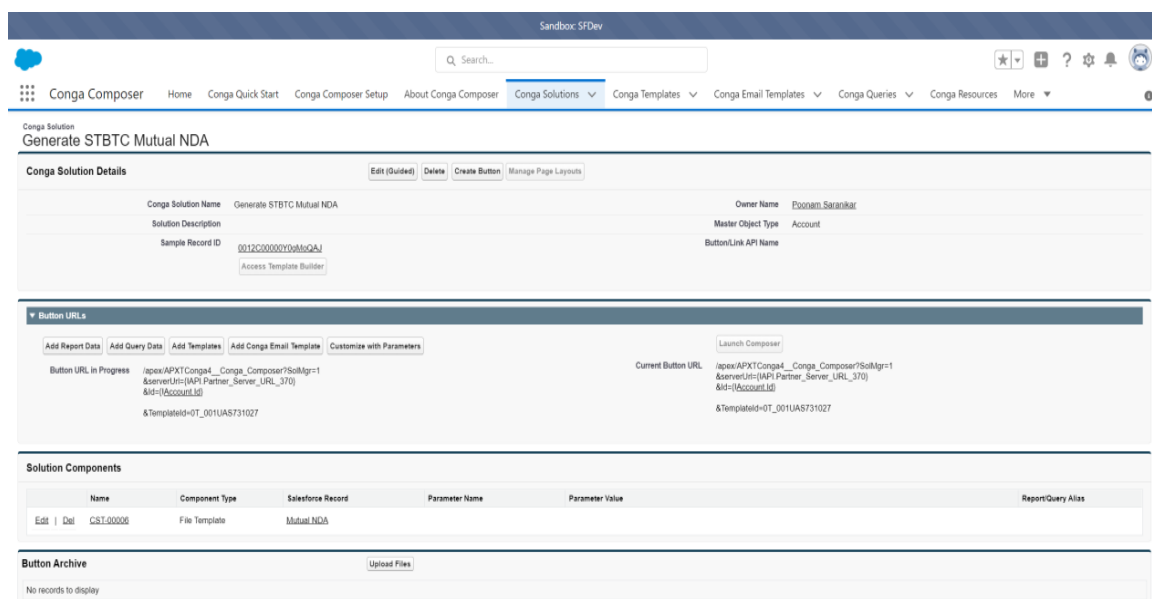
- **APXTConga4.Composer Setting**
- **APXTConga4.Conga Solution Export Environment**
- **APXTConga4.Conga Solution Export Setting**
- **APXTConga4.Connected App Setting**
- Batch (if Conga Batch is installed)
 - **APXT_BPM.Conductor Region**
 - **APXT_BPM.Conductor Setting**
- Trigger (if Conga Trigger is installed)
 - **CongaWorkflow.Workflow Region**
 - **CongaWorkflow.Workflow Setting**
- Navigate to **Setup** → **Security Controls** → **Session Settings** and ensure that Lock sessions to the IP address from which they originated is not enabled.
- **Configuring Permissions Sets –**
 - Conga Composer is installed with the following Permission Sets that you can use for user access and permissions.
 - **Composer_Administrator**: Setup permissions for Conga Composer Administrator.
 - **Composer_User**: Setup permissions for Conga Composer User.
 - **Composer_Salesforce_Community_User**: Setup permissions for Conga Composer Communities User.

Create 'Conga Solution' record and create an action/button to generate the document

- Click on the app launcher icon and select the '**Conga Composer**' application.
- Click on the '**Conga Solutions**' tab -> Enter '**Conga Solution Name**' and select '**Master Object**' (Account) -> Click on the '**Create Record**' button.
- Open the conga solution record which you created in step 2. There will be the option '**Create button**' which will automatically create a button/action

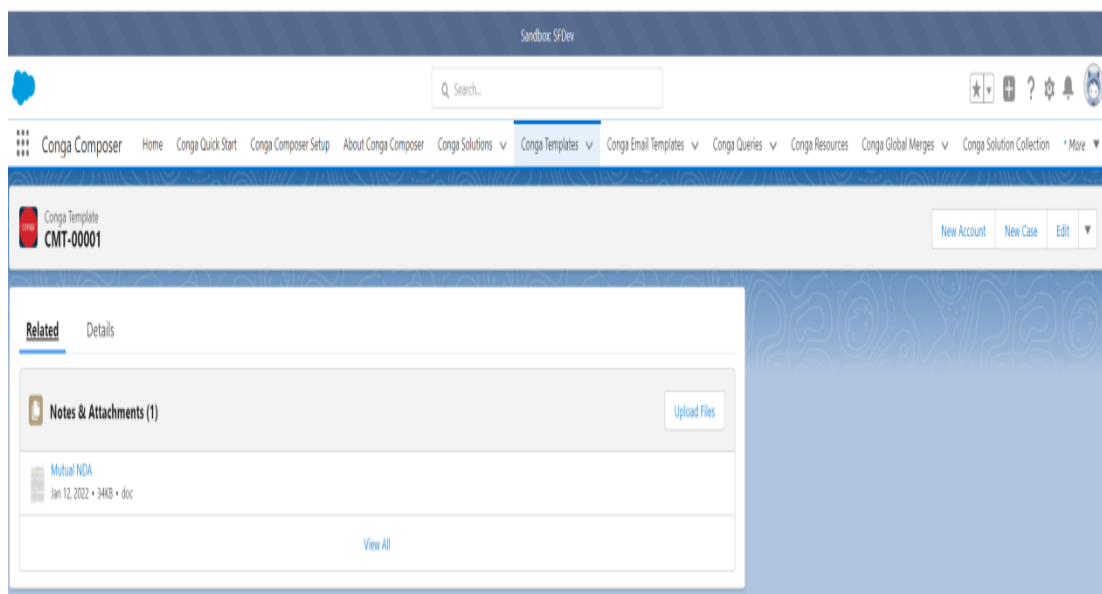
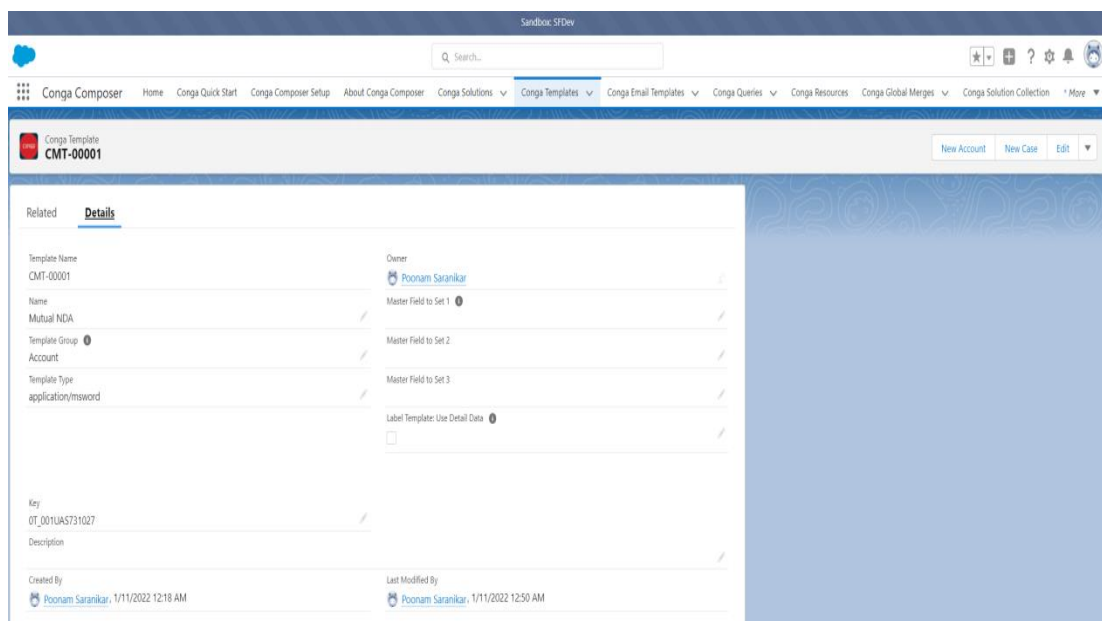
on the master object (Account) which you selected in step 2 to generate the document.

- Newly created button/action will automatically add to the master object (Account) page layout. If not added, then follow the below steps to add a button/action to the master object page layout.
- Click on Setup->Object Manager ->Click on master object name (Account) -> Page Layout ->From '**lighting and mobile action**' drag action/button which is generated and add button/action under 'Mobile and lighting action section'.



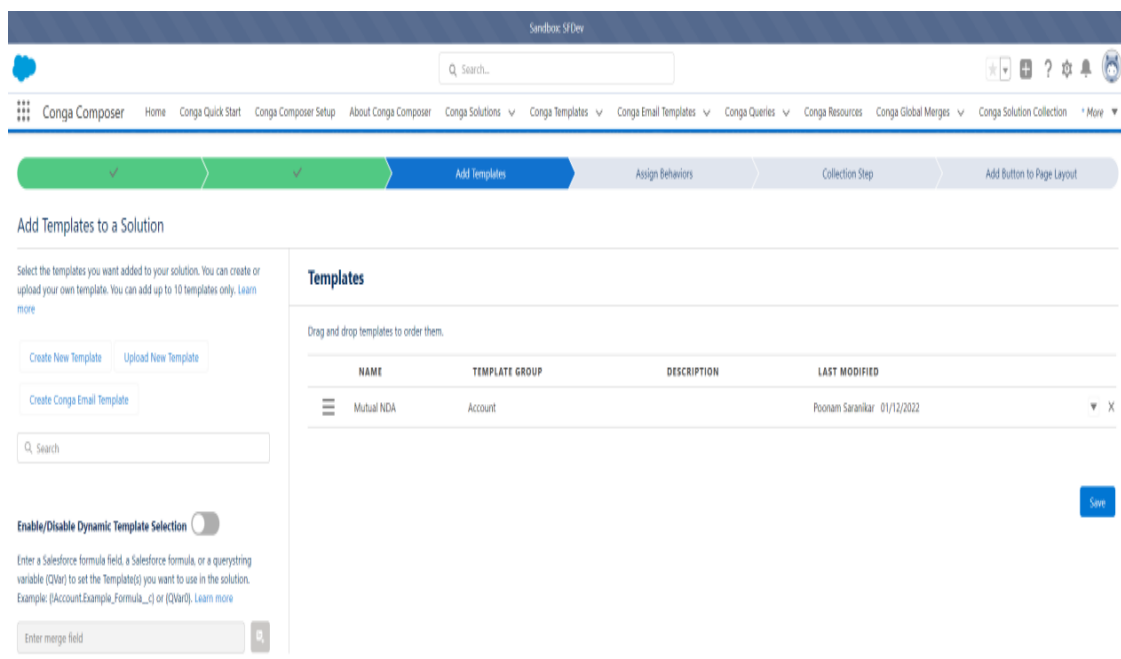
Create 'Conga Template' record to upload your template which you will use to generate documents from records

- Click on the '**Conga Template**' tab. -> Click on the '**New**' button.
- Enter the required field. Select '**Template Type**' whether its document/label /envelope. '**Template Group**' here you can enter object name (Account) (means for which object you are creating this template)
- Open the created record. If you already created the template with the correct Salesforce merge field, then you can upload your template file under the '**Related tab**'.
- Click on the 'Related' tab on the same record -> Under the '**Notes and Attachment**' related list clicks on the '**Upload File**' button to upload your template file.

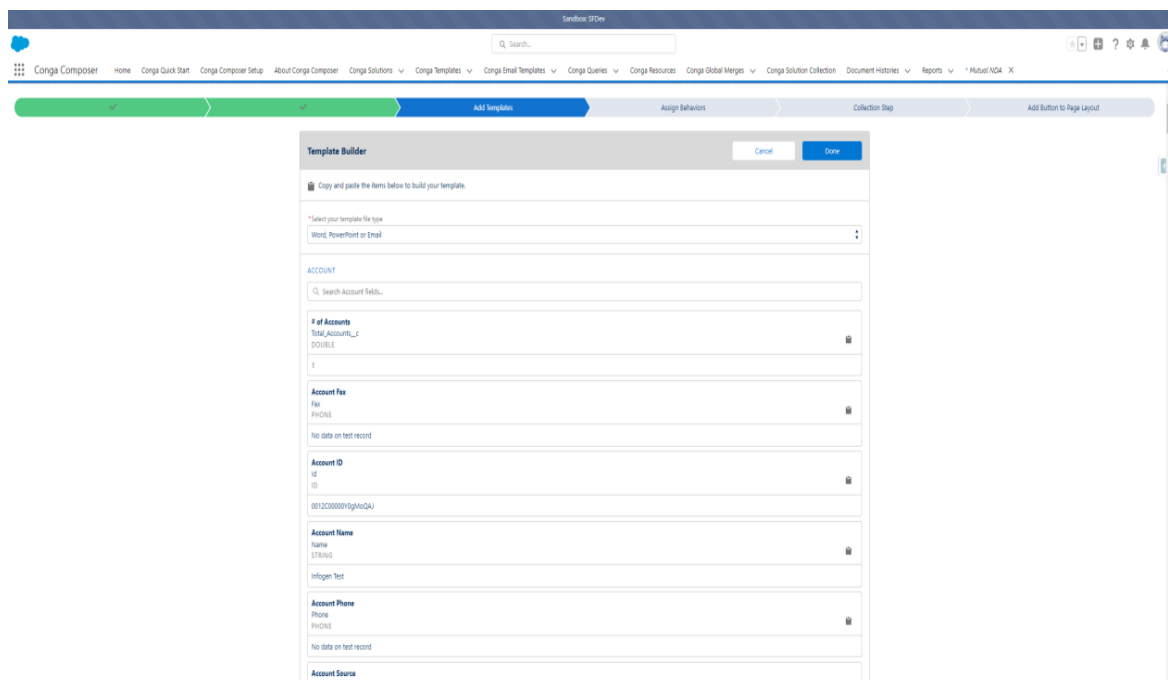


Salesforce merge field for the template

- **Way 1:** From `Conga Solution` record.
 - Open the `**Conga Solution**` record that you created above.
 - Click on the `**Edit (Guided)**` button.
 - Below screenshot page open.

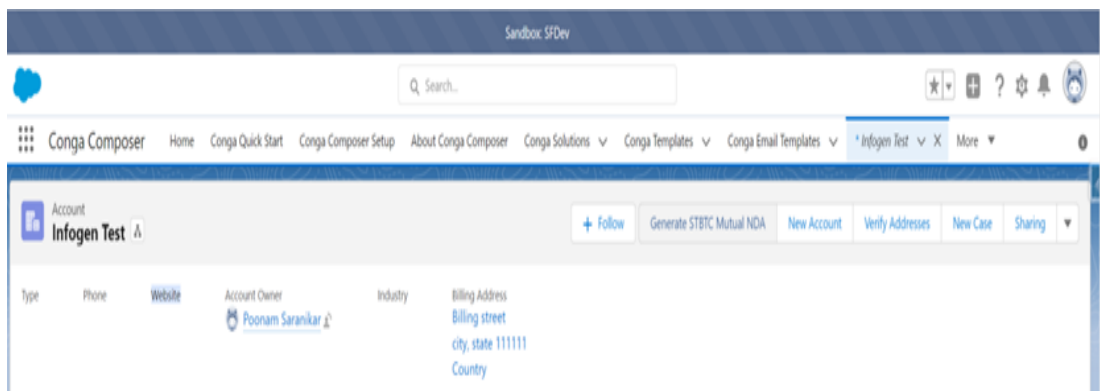


- Click on the **'Add Template'** option.
- On the left side you will find the option to create a template, upload a template, or create an email template.
- Click on the **'Create New Template'** option and here you will find all fields related to the master object. Copy the field which you want to add to your template and paste it into your template.

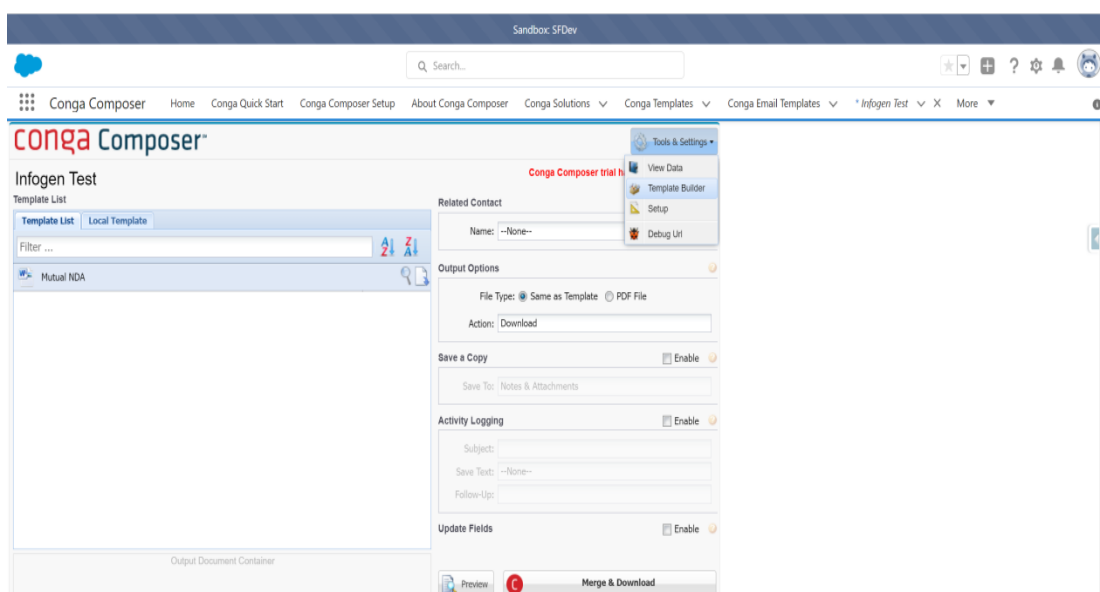


- **Way 2:** From any master object record by clicking the document generation action/button.

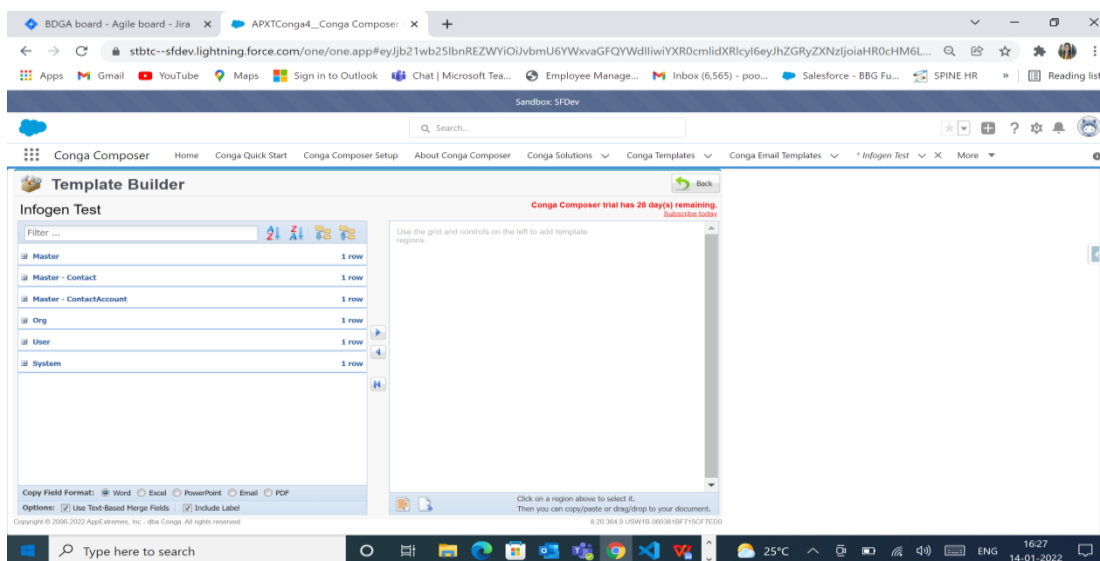
- Let's say the master object is 'Account'. Open any Account record.
- Click on the 'Generate STBTC Mutual NDA' button/action.



- Below screenshot page will open.



- Click on the 'Tool & Setting' drop down and select 'Template Builder'.



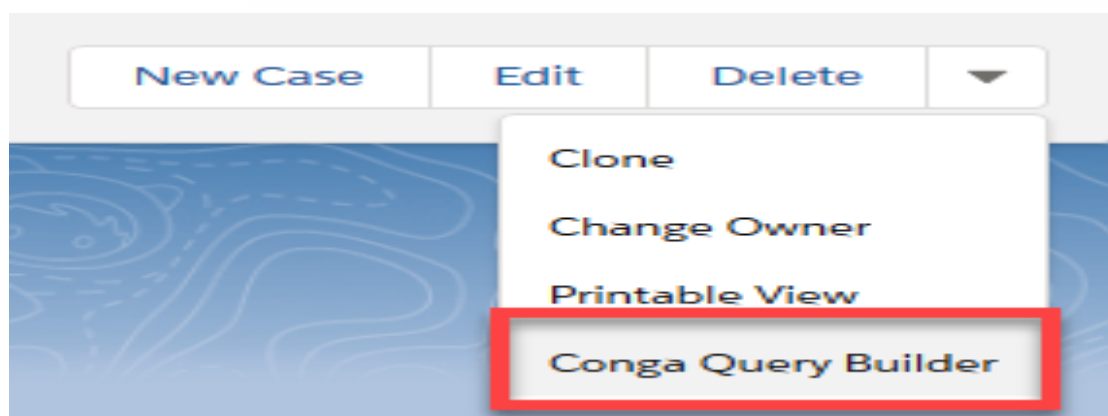
- Click on **Master** -> You will find all fields. Add the field by using the arrow and copy the field name and add to your template.

Create A Conga Query with Conga Query Builder

- Use Conga Queries and SOQL statements to merge Salesforce data into your documents. Conga Queries are used any time you need to access child object data or need to access data that is not on your master object.
- **To create a Conga Query**
 - Navigate to the **Conga Queries** tab.

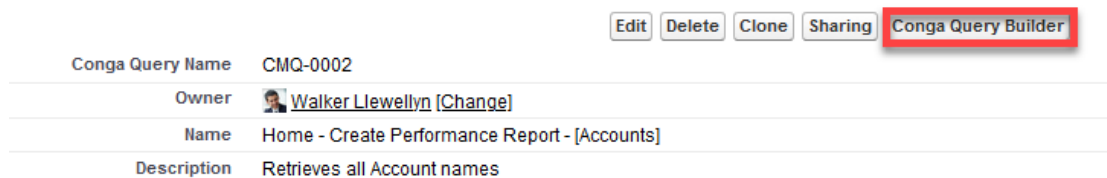
	Conga ...	Name	Description	
1	<input type="checkbox"/>	CMQ-0000	Home - Create Performance Report - [Revenue]	Sums the total price of all products on 'Closed Won' Opportunities, grouped by product
2	<input type="checkbox"/>	CMQ-0001	Home - Create Performance Report - [PipelineLastYear]	Retrieves data from products with an Opportunity Close Date in last year
3	<input type="checkbox"/>	CMQ-0002	Home - Create Performance Report - [Accounts]	Retrieves all Account names
4	<input type="checkbox"/>	CMQ-0003	Home - Create Performance Report - [PipelineYTD]	Retrieves data from products with an Opportunity Close Date in this year
5	<input type="checkbox"/>	CMQ-0004	Home - Create Performance Report - [AcctCases]	Counts the total number of Cases, grouped by Account

- Click **New** to create a new Conga Query record.
- Type a **Name and Description**.
- Leave the SOQL Select Statement field blank.
- Click **Save**.
- Click **Conga Query Builder**.
 - In Lightning, click the Conga Query Builder button. You may have to select the dropdown in the right-hand corner to see

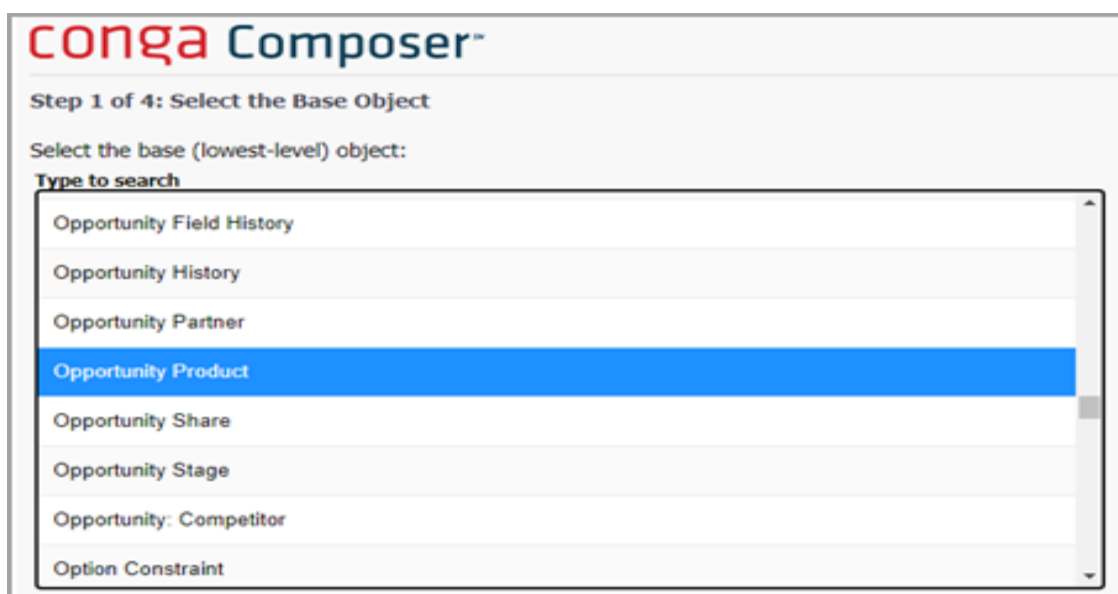


the button:

- o In Classic, click the **Conga Query Builder** button to launch the Query Builder.



- o Click an **object** in the list to select it as the base object of your query. The object should be the lowest level object in your data structure.
- o For example: If you are querying for Opportunity Line Items but your button is on the Account, the lowest level object would be Opportunity Line Items (Opportunity Product). You would select that object on this screen.



- o Click **Next**.
- o Click on the **fields** you want to display and click >> to move them to the Selected Fields area. Click the headers to access additional fields.
- o Click **Next**.
- o Set the Field dropdown to the ID of the object where your button resides.
- o Set the **Operator** dropdown to equals and leave the Value field blank.
- o (Optional) Choose a sort order and number of rows to display.

- Click **Next**.
- On the resulting page, you see your **SOQL** statement.
- (Optional) To test your query, enter the Salesforce ID of an appropriate record into the pv0, pv1, pv2, pv3, or pv4 fields and click Preview.
- The information is displayed in a pop-up window so make sure you have any pop-up blockers disabled or have set your browser to allow pop-ups from Salesforce.
- When you have completed testing, click Save.

References

- <https://documentation.conga.com/composer/latest/composer-product-guide-158340372.html>