Invoice Generation

Contents

About Conga Invoice Generation

Conga Invoice Generation for Salesforce Billing is a Conga product that works exclusively with Salesforce Billing. It allows Salesforce Billing customers to customize and export invoices, statements, and receipts that provide a free and powerful way to generate documents.

What's in the Package?

The Conga Invoice Generation for Salesforce Billing package includes:

- Conga Invoice Generation
- Conga Batch. For more information, refer to Conga Batch product documentation.
- Conga Trigger. For more information, refer to Conga Trigger product documentation.

What are the Limitations?

Conga Invoice Generation for Salesforce Billing includes all of the features and functionality of Conga Composer with the following exceptions:

- Customers can only generate documents from the objects within the Salesforce Billing installed package (those with the blng prefix).
- Word and HTML Email are the only supported template types.
- Email and PDF are the only output file types.
- Up to 1,000 free invoices per month.

What's New in CIG Documentation

This section covers all the changes in the documentation to support each release.

February '23

Document	Publication Date	Topic	Description
February '23		Support of Salesforce API Version	Updated the topic with information about the impact of Salesforce API Version Retirement on the Conga Invoice Generation custom button.

Using Conga Invoice Generation

Conga Invoice Generation for Salesforce Billing is a Conga product that works exclusively with Salesforce Billing. It allows Salesforce Billing customers to customize and export invoices, quotes, and receipts, providing a free and powerful way to generate documents.

Getting Started with Conga Invoice Generation

To get started with Conga Invoice Generation, we recommend you deploy one of the pre-configured Quick Starts.

Conga Invoice Generation Features and Functionality

Conga Invoice Generation for Salesforce Billing includes all of the features and functionality of Conga Composer with the following exceptions:

- Customers can only generate documents from the objects within the Salesforce Billing installed package (those with the blng prefix).
- Word and HTML Email are the only supported template types.
- Email and PDF are the only output file types.
- Up to 1,000 free invoices per month. Additional service events can be purchased.
- Product support is provided by Salesforce CPQ (not Conga directly),
- The output document will include "Powered by Conga" in red letters, in the document footer

Create a Custom Conga Invoice Generation for Salesforce Billing Solution

If you want to create a custom Conga Invoice Automation for Salesforce Quote to Cash solution (or tweak the Starter Pack solution), you can do so from the Conga Solutions tab using the Conga Solution Manager.

Create Your Own Document Generation Solution

If you want to create a custom document generation solution (or customize one of the Quick Starts), you can do so from the Conga Solutions tab using the Conga Solution Manager. For an overview of this process, see Creating and Managing Composer Solutions.

> **Tip:**
>
> Conga Invoice Generation for Salesforce Billing includes all of the features and functionality of Conga Composer, with the exceptions listed below.

Create Documents in Batches

After deploying or creating your document generation process for Conga Invoice Generation, you can run that process in batches using Conga Batch. Read more about creating a Batch solution.

Automate with Conga Trigger

You can also use Conga Trigger to automate your Conga Invoice Generation for Salesforce Billing solutions. Read more about automating with Conga Trigger.

Limitations

Conga Invoice Generation for Salesforce Billing has the following limitations:

- Customers can only generate documents from the objects within the Salesforce Billing installed package (those with the *blng* prefix).
- Word and HTML Email are the only supported template types.
- Email and PDF are the only output file types.
- Up to 1,000 invoices per month.

Deploy a Conga Invoice Generation for Salesforce Billing Quick Start

How to deploy the Conga Invoice Automation for Salesforce Quote to Cash Conga Composer Starter Pack.

What Quick Starts are Available?

Quick Starts include all of the components needed for a document generation solution. The purpose of a Quick Start is to help you get up-and-running quickly with a pre-configured template and pre-determined data sources.

The QuickStart solutions for Conga Invoice Generation for Salesforce Billing include:

- Account Statement
- Create Receipt
- Create Credit Memo
- Create Debit Memo
- Generate Invoice

How Do You Deploy a QuickStart?

To deploy a Quick Start, follow these steps:

1. When installing Conga Invoice Generation, select Install for All Users.
2. Select Conga Invoice Generation from the App dropdown.
3. Click the Conga Quick Start tab.
4. Select the Quick Start you want to use.
5. Click Go to Page Layouts.
6. Add the newly created Conga Invoice Generation button to the Page layout and click Save.

You will be prompted to enable Remote Sites when you select the QuickStart. You must do this in order for Conga Invoice Generation to be able to create the button. Also, you must configure Configure Composer as a Connected App before using the solution.

Known Issue: False Expiration Warning

Known Issue

> **Note:**
> This known issue only occurs in Conga's classic user interface. It does not appear when using the Lightning Component.

A false expiration warning appears when launching Conga Quote Generation and Conga Invoice Generation solutions in Salesforce. Despite the expiration warning displaying in the Composer user interface, it will not prevent users from generating documents.

Resolution

Use one of the options below to resolve the false expiration message:

- Use the DS7 parameter and run the solution in background mode. This prevents the false expiration message from displaying when the solution is launched.
- Use the Lightning Component instead of a button or link. The false expiration message does not occur when using the Lightning Component.
- Instruct your Salesforce users to ignore the false expiration message.

Migration Path for Conga Invoice Generation to the New Composer Package

The following is a list of steps for migrating a Salesforce org that is currently using CIG package and does not yet have the Conga Composer Package installed.

To begin the migration process and install the Composer Package, you must first uninstall the CIG package. Before uninstalling, it is important that you collect and store all current Conga Solutions, Conga Queries, and Conga Templates on your local desktop. These will have to be recreated and modified to be used in the newly installed

Composer Package. It is also necessary to collect and store all users that are assigned permission sets associated with the CIG packages, as these permissions sets will also have to be removed from the users for a successful uninstall. They will need to be reassigned to those users once the Composer Package is successfully installed.

Step 1: Export CIG Templates, Queries and Solutions

1. Go to Conga Templates and download your Template documents and files to your local desktop.Optionally, if you have many templates, you may use the Salesforce Data Export feature to copy your files to your local machine. However, this does not filter your templates

2. Go to Conga Queries, copy the SOQL statement of each query and save it to a text or word file to your local desktop.

3. Go to Conga Solutions, click into each solution and click Export Solution. In the new window, click the Download button and save the files to your local desktop.

Step 2: Remove Permission Sets

1. Go to Salesforce Setup > Users > Permission Sets.

2. Click the permission set CIQ Additional, click Manage Assignments, then select all users assigned to this permission set and click Remove Assignment.

Step 3: Uninstall Conga Invoice Generation

Go to Salesforce Setup > Apps > Packaging > Installed Packages. Find the CIG package and click the Uninstall link.

Example

Conga Invoice Solution to be stored:

```
/apex/csfb__Conga_Composer?SolMgr=1
&serverUrl={!API.Partner_Server_URL_370}
&userName={!$User.Username}
&Id={!blng__Invoice__c.Id}

&QueryId=[LineItems]a2WHn00000CK4Yf,
[Usages]a2WHn00000CK4Yg,
[CompanyDets]a2WHn00000CK4Yh

&TemplateId=a2eHn0000043Apy

&FP0=1
&AC1=Invoice+Generated
&SC0=1
&SC1=SalesforceFile
&OFN=Invoice+for+{!blng__Invoice__c.blng__Account__c}+-+{!TEXT(TODAY())}
&AC0=1
&TemplateGroup=Invoice
&XDO=CIA
&ContactId={!blng__Invoice__c.blng__BillToContactId__c}
&XDO2=GenerateInvoice
&GEO={!$User.Country}
```

Step 4: Install Composer

Refer to [Installing Conga Composer](#) for specifics on the installation process for Composer.

After uninstalling the CIG package and installing the Composer package successfully, recreate all solutions, queries, and templates in the new package.

Update the namespace for any solutions using the CIG namespace to the Composer namespace for all solutions leveraging a VisualForce page for launching Composer.

Example

Original Solution:

```
/apex/csfb__Conga_Composer?SolMgr=1
&serverUrl={!API.Partner_Server_URL_370}
&userName={!$User.Username}
&Id={!blng__Invoice__c.Id}
```

Modified Solution for new package:

```
/apex/APXTConga4__Conga_Composer?SolMgr=1
&serverUrl={!API.Partner_Server_URL_370}
&userName={!$User.Username}
&Id={!blng__Invoice__c.Id}
```

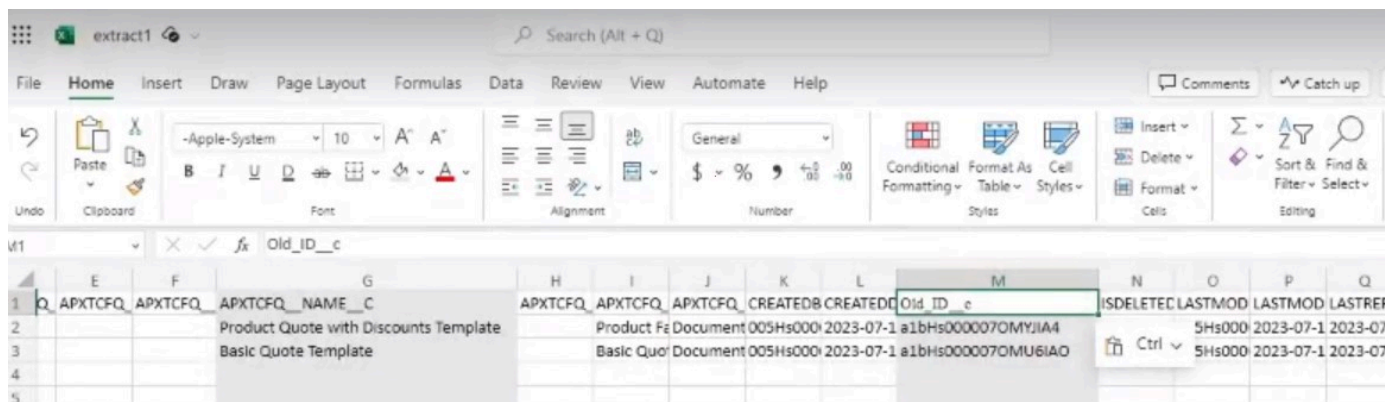## Using Salesforce Data Loader to Export and Import Templates:

Exporting your Templates

If you have access to Salesforce Data Loader, you may use it to export CIG Templates. For more details on using Data Loader, refer to [Insert Files with Data Loader](#).

1. Open Salesforce Data Loader, click **Export All**.
2. Select Conga Quote Template (APXTCFQ__Conga_Template__c).
3. Click **Browse** and create a File location to export your files to.
4. Click **Extract**.
5. Use the **Select All Fields** button to select all your Template Fields and press **Finish**.
6. On the prompt regarding exporting all records, click **Yes**.

Import your Templates into your Org.

1. In your org, go to Object Manager and search for Conga Template (APXTConga4__Conga_Template__c)
2. Go to Fields and Relationships, click **New** and select Text for the field type. Give it the label "Old ID" and a Length value of 255.
3. Determine the Visibility of the field, ensure that at minimum System Administrators have access to the new Old ID field. It does not have to be added to the Page Layout. Click **Save**.
4. Copy the API name of the Field (Old_ID__c) and go to your extracted file for your Templates.
5. Find the ID field in the document and paste the Old_ID__c value over the ID column header.

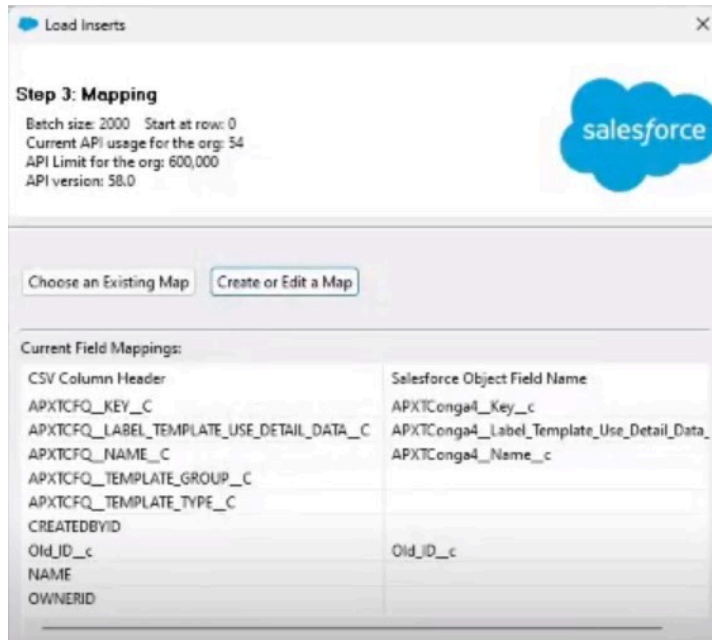6. Open Salesforce Data Loader, click **Insert**.

   📝 **Note:**

   If your template Name field contains a "-" in the label (example: CQT-0004), you may run into problems with Data Loader. To work around this, navigate to Salesforce Data Loader > Settings and confirm that

"Read all CSVs with UTF-8 encoding" is enabled, and remove the "-" from the "Other Delimiters for load operations".

It is also recommended to enable "Use Bulk API".

7. Select the Conga Template (APXTConga4__Conga_Template__c) object, then select your file to import it.

8. In the Mapping popup, click the **Create a Map** button, then drag and drop your fields to map them to the correct column header. Most importantly, map the Old_ID__c field to the Old_ID__c field.

9. Save your mapping to your local machine and click **Finish**.

10. On the Finish popup, click **Browse** to choose where your Results file will appear. Begin the Import.

11. Once completed, click the **View Successes** button, then click **Open in external program** to receive a new Success Export file.
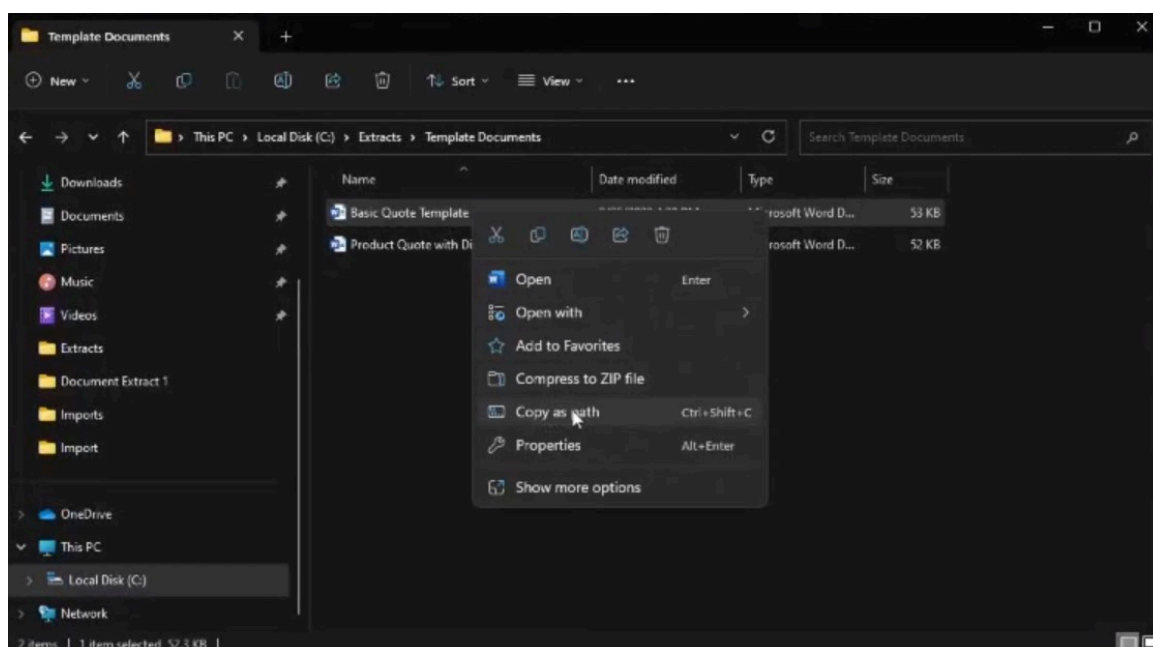
Uploading your Templates

1. Create a File Import CSV per the instructions found in Insert Files with Data Loader.

2. Ensure that the ID of the Conga Template you want to link your file to in your Success Export File exactly matches the FirstPublishLocationId column of your File Import CSV.

3. Ensure that your file path is correct in both the VersionData and PathOnClient fields. To do this, find your Template saved on your local machine, right-click on the document and select "Copy as Path". Paste this value into the correct VersionData/PathOnClient field.

4. In Salesforce Data Loader > Settings, set Batch Size to 1 and disable Use Bulk API.

5. Click **Insert**, enable "Show all Salesforce objects" and search for Content Version (ContentVersion).

6. Choose your File Import CSV, then complete mapping your fields.

7. On the Finish popup, click **Browse** to choose where your Results file will appear. Begin the Import.

8. Once the Import is complete, click **OK**.
   Your templates will be recreated in your Salesforce environment.

Conga Customer Community & Learning Center Resources

Transform your business and drive success with your one-stop shop, resource-rich Conga Customer Community.

After registering as a new member, you can explore a variety of resources, including exclusive access to our product user groups, where you can ask questions, collaborate with peers, and learn best practices.

From a personalized onboarding checklist to free expert-led webinars and our thought-leadership blog, the community is not only a gateway to your success, but a way to manage your Conga account, access the install center, and submit support tickets.

Don't forget to check out the Conga Learning Center to review your limited catalog of getting started courses. Want more? Consider upgrading to the Conga Learning Pass to unlock our premium training subscription.

Ready to get started?

Log into the Conga Customer Community with your credentials. Not yet registered? No problem. Set up an account to receive your credentials via our registration page.

After you log in, explore everything the community has to offer by clicking the "Get started" tab in the top navigation menu.

If you're ready to jump right into training, there are two ways to access the Conga Learning Center:

- On the home page, click the "Learning center" tile
- In the top navigation, click the "Learn" tab and then click "Learning center" on the dropdown menu

Using Conga Invoice Generation: Salesforce Revenue Cloud

Starting on October 4th, completing the installation of the latest Composer package (8.263) and setting your Composer edition to "Salesforce Revenue Cloud" you can benefit from Conga Invoice Generation: Salesforce Revenue Cloud, allowing you to customize and export invoices, quotes, and receipts, providing a free and powerful way to generate documents.

About Conga Invoice Generation: Salesforce Revenue Cloud

Conga Invoice Generation for Salesforce Billing is a Conga product that works exclusively with Salesforce Billing. It allows Salesforce Billing customers to customize and export invoices, statements, and receipts that provide a free and powerful way to generate documents.

Included Packages:

Conga Invoice Generation customers need to install the following packages:

- Conga Composer:

  - Click this link to access the Conga Composer AppExchange listing.
  - Click **Get It Now** and choose whether to install in Production or Sandbox.
  - Agree to the terms and conditions and click **Confirm** and Install.
  - Select **Install for All Users** and click **Install**.
  - Agree to grant access to third-party web sites and click **Continue**.
- Conga Batch. For more information, refer to Conga Batch product documentation.
- Conga Trigger. For more information, refer to Conga Trigger product documentation.

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Conga Invoice Generation: Salesforce Revenue Cloud Features and Functionality

Conga Invoice Generation for Salesforce Billing includes all of the features and functionality of Conga Composer with the following exceptions:

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Create a Custom Conga Invoice Generation: Salesforce Revenue Cloud for Salesforce Billing Solution

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