

Basic Settings and Configuring Composer

Once the installation is complete, go to the *Conga Composer Setup* tab. At the bottom of the Basic tab, click **Save Changes**.

If you are installing for a PAID Composer Subscription Only: Email onboarding@getconga.com with your Org ID and Account Name to notify Conga that you have completed the installation. To find your Org ID, see: [Where can I find my Salesforce Org ID?](#)



- Your initial installation is automatically provisioned as a 30-day trial with access to 10 licenses. Emailing onboarding@getconga.com ensures your licenses are enabled as quickly as possible.
- Conga Onboarding provisions your licenses within three business days. You will then [Assign User Licenses](#) (Production orgs only). You have access to have access to 10 licenses, and 1 will already be assigned to you as the Admin.

Conga Composer Setup

Navigate to the Conga Composer App in Salesforce, and then select the Conga Composer Setup Tab. You can change various user management, integration and basic settings in Conga[®] by visiting the Conga Setup Tab.

Under the Basic tab, you can change the default settings for local template usage, template manager repositories and solution behaviors. You must ensure that the following items are selected in the listed sections:

- Under the **Conga Template Manager**: Ensure Enable the new, built-in Conga Template Manager is checked (this should be enabled by default)
- **Offline Access**: Click **Update Salesforce Token** - If the Conga Scheduler Window opens, click **Allow**.
- **Behavior Modifications**: Ensure all items are selected. (This should be enabled by default.)



Conga Composer's user interface dynamically translates to German and French for Salesforce users that have their local language in Salesforce set to German or French. For more information, [Supported Composer User Interface Languages](#).

Allow Use of Local Templates

By default and as a recommended practice, only users with the Salesforce® System Administrator profile are permitted to upload a template from their local hard drives. This feature is always enabled for administrators because of its utility in creating and testing templates. You may enable this feature for all other user profiles by checking the box to permit users to upload a template from a local drive.

 Local templates can also be enabled on a solution-by-solution basis via the Conga Composer® parameter &DS8=1. Visit the Conga Composer Index of Parameters for more information.

Conga Template Manager

Instead of using the Salesforce Communication Templates repository, **we strongly recommend you store templates in the Conga Template ManagerSM** (see Storing Merge Templates for details). This custom object is included in the Conga Composer application so does not require separate installation.

About the Behavior Modification Section

The Behavior Modification settings govern how Conga® retrieves data and how templates behave. If your organization is new to Conga, we strongly recommend that you enable all of the Behavior Modification settings.



If your organization is upgrading to Release 8 from Conga Composer 1.6 or earlier (or any version where you previously did not have these settings enabled), you may now enable these settings, however, they might affect your templates. Proceed with caution.

Query Object Name Correction

This setting corrects a problem in which Conga Queries resulted in object names with double underscores. For example, a merge field name for the Amount field on an Opportunity sometimes appeared as:

EXAMPLE

OPPORTUNITY__AMOUNT

Rather than:

EXAMPLE

OPPORTUNITY_AMOUNT


This was an issue because modifying the Conga Query sometimes resulted in slightly different field names, thus preventing a merge field from working properly.

Prevent Auto-Incrementing Column Name

This setting corrects a merge field naming problem in Reports and Queries in which column names were appended with “_1” to delineate multiple instances of the merge field across the entire dataset.

Word Templates: Require TableStart/TableEnd for Detail Regions

You must use TableStart/TableEnd to access detail data, which is important because some customers have unintentionally discovered that Conga Composer would generate a separate document for each row of detail data in the absence of a TableStart/TableEnd.

 In Conga Composer Release 8, all templates require TableStart and TableEnd in order to merge detail data, regardless of whether this checkbox is checked.

Simple Report Column Names

This setting prevents Conga from altering field names used in Reports and Queries when a Salesforce ID column is also referenced in the Report or Query.

Enable Text-based Merge Fields (Word)

This setting enables text-based merge fields in Microsoft Word templates. If this setting is not enabled only Microsoft Word® traditional merge fields are available.

EXAMPLE

Text-based merge field: {{ACCOUNT_NAME}}

Traditional merge field: «ACCOUNT_NAME»
