

Create a Conga Composer OAuth Button

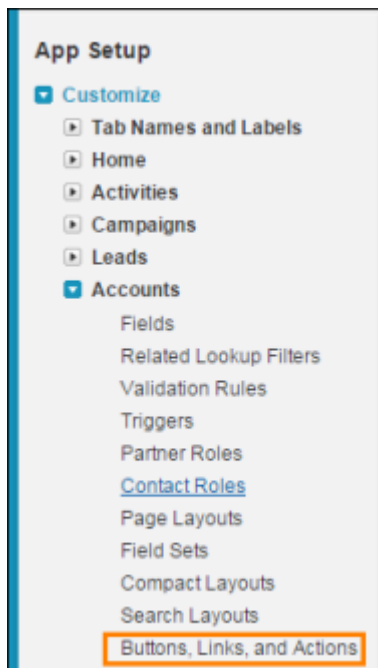
If you want to use OAuth with Conga Composer®, you must create special Conga Composer OAuth buttons. These buttons are included in the managed package. You can use the managed buttons or follow the procedure below to update the URL of an existing button.

 You must use Composer OAuth buttons in Salesforce Lightning®.

To create a Conga Composer OAuth button:

Media, iframe, embed and object tags are not supported inside of a PDF.

1. Navigate to Leads, Accounts, Contacts, Opportunities, Cases, Contracts, or Solutions > Buttons, Links and Actions > Conga Composer (OAuth) to locate a managed Conga Composer OAuth button.



2. Copy the contents of the Button or Link URL field to your clipboard.
3. Navigate to your desired standard or custom object.
4. Click New Button or Link.

Buttons, Links, and Actions
Account

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions				New Action	New Button or Link	Default Custom Links
Action	Label	Name	Description			
Edit Del	Account Plan 1	Account_Plan_1				
Edit	Accounts Tab	Tab				
Edit Del	Conga Account Brief	Conga_Account_Brief				
Edit Del	Conga Account Briefs	Conga_Account_Briefs				
Edit Del	Conga Account Plan	Conga_Account_Plan				
Edit Del	Conga Account Plan 1	Conga_Account_Plan_1				
Edit	Conga Composer	Conga_Mail_Merge	*** DO NOT USE THIS BUTTON ON A PAGE LAYOUT *** COPY THE URL FROM THIS BUTTON and paste it into your own custom button or link. Then add optional parameters to final Configuration Guide for details.			
Edit	Conga Composer (OAuth)	Conga_Composer_OAuth	*** DO NOT USE THIS BUTTON ON A PAGE LAYOUT *** OAuth buttons require additional setup. Please see the Composer Installation Guide for more details. COPY THE URL FROM THIS BUTTON and paste it into your own custom button or link. Then add optional parameters to final Configuration Guide for details.			

5. Complete the Label field to give the button a name.

Account Custom Button or Link
New Button or Link

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label

Name

Description

Display Type

☒ Detail Page Link [View example](#)

☐ Detail Page Button [View example](#)

☐ List Button [View example](#)

Behavior [View Behavior Options](#)

Content Source

Select Field Type Insert Field Insert Operator

Functions

-- All Function Categories --

ABS

AND

BEGINS

BLANKVALUE

CASE

CASESAFEID

[Insert Selected Function](#)

6. Press Tab or click in the Behavior field to automatically populate the Name field.

7. In the Behavior field, select Display in new window.

Account Custom Button or Link
New Button or Link

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label

Name

Description

Display Type

☒ Detail Page Link [View example](#)

☐ Detail Page Button [View example](#)

☐ List Button [View example](#)

Behavior [View Behavior Options](#)

Content Source

Select Field Type Insert Field Insert Operator

Functions

-- All Function Categories --

ABS

AND

BEGINS

BLANKVALUE

CASE

CASESAFEID

[Insert Selected Function](#)

8. In the URL field, paste the Button or Link URL you copied in step 2.

9. Click Save.

10. Click Window Open Properties, set the Height to 660 and Width to 900, and then click Save.

11. Add your button to the object's page layout. The button is available from the button drop-down list on the record.

12. (Optional): To make the button visible on the record itself, add the button to the Salesforce1 and Lightning Experience Actions section on the page layout. Drag and drop the button to the Salesforce1 and Lightning Actions section.



After creating the Conga Composer OAuth button, administrators must configure Conga Composer as a Connected App and grant access to specific users via Profiles or Permission sets. These steps are covered in [Configure the Conga Composer Connected App](#).