

Preparing Conga Composer Settings for use in a Sandbox

You can configure your instance of Salesforce so that if you later generate a Sandbox from the production instance, Conga automatically transfers your license information to the Sandbox. This is recommended for any organization using Sandboxes. Conga views each Sandbox as a new 30-day free trial of Conga Composer.

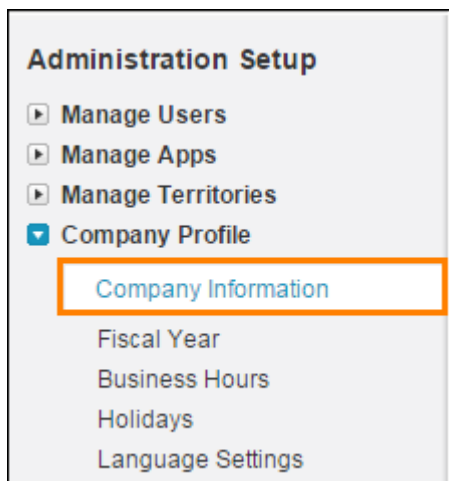
 : Configuring Conga Composer Settings in a production instance will only affect new sandboxes and does not have any influence on existing, refreshed sandboxes.

To configure Conga Composer for use in a sandbox:

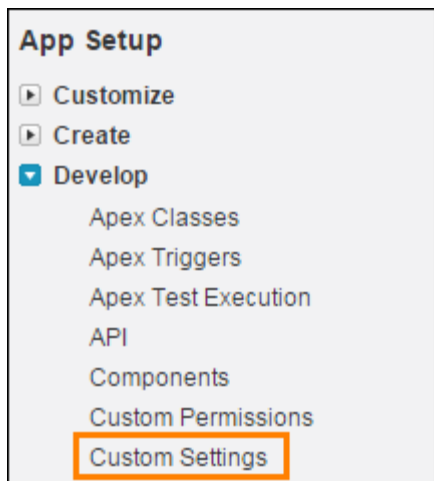
Media, iframe, embed and object tags are not supported inside of a PDF.

1. In your Production instance, copy your Salesforce Organization ID to the clipboard.

To view your ID, visit **Setup > Company Profile > Company Information**.



2. In Setup, click **Develop > Custom Settings**.



3. Click Manage for Conga Composer.

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 10 MB.

View: [All](#) [Create New View](#)

Action	Label	Visibility	Settings Type	Namespace Prefix	Description
Manage	Conga Composer Settings	Public	List	APXTConga4	Settings used by Conga Composer. These extend the organization object.
Manage	Conga Solutions Settings	Public	List	APXTConga4	

4. If necessary, click New to create a new record, otherwise click Edit.

Custom Setting: Conga Composer Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether

View: [All](#) [Create New View](#)

Name

No records to display.

5. In the Name field, type Conga Settings.

Conga Composer Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Conga Composer Settings [Save](#) [Save & New](#) [Cancel](#)

Conga Composer Settings Information

Name

Comments

Production Org Id


Server Endpoint URL

Disable C7 Triggers ☐

6. In the Production Org ID field, paste your Organization ID.

7. Click Save.

With this Custom Setting established, Conga carries the ID of your Production instance to any Sandboxes generated. The first time you click a Conga button from within the Sandbox, Conga recognizes that the Sandbox is linked to an existing production instance and automatically transfer account subscription dates and template manager settings. User permissions are not transferred. Conga user license restrictions are not enforced in Sandbox instances.

 : Remember to e-mail onboarding@getconga.com after installation (if you have not done so already) to ensure the fastest provisioning of any additional licenses or Composer automation products.