

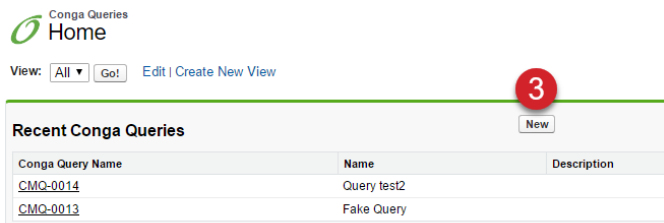
Create A Conga Query With Conga Query Builder

 Due to the complicated nature of SOQL statements, our support staff can only assist with the creation of SOQL statements generated through our tools, such as Conga Query Builder.

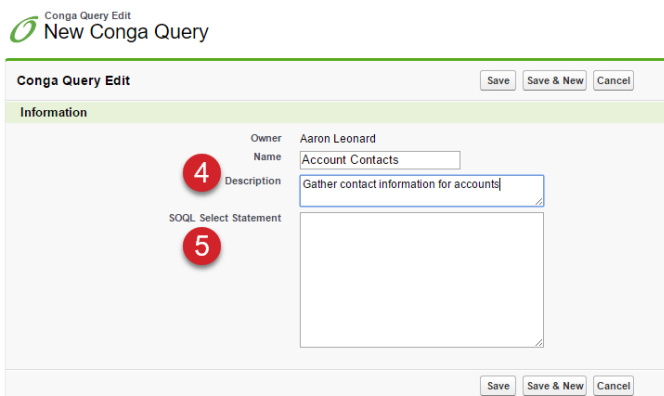
Queries can be used instead of reports in Salesforce. Conga Queries contain a SOQL SELECT statement that is specifically tuned to work in conjunction with Conga Composer and Conga Mail Merge. See [About Conga Query Manager](#) for more information.

To Create a Conga Query:


1. Navigate to Conga Queries.
2. Click New.



3. Type a Name and Description.



4. Leave the SOQL Select Statement field blank.

 If you already have a SOQL query, you can enter it into the **SOQL Select Statement** field.
If you already have a query, you can stop after step 6.

5. Click Save.
6. Click Conga Query Builder.

Conga Query Detail

CMQ-0016

Owner: Aaron Leonard (Change)

Name: Account Contacts

Description: Gather contact information for accounts

SOQL Select Statement

Created By: Aaron Leonard, 12/6/2016 12:51 PM

Buttons: Edit, Delete, Clone, Conga Query Builder

7. Click an object in the list to select it as the base object of your query.

 The object should be the lowest level object where you want to read data from.

Conga Query Builder

Step 1 of 4: Select the Base Object

Select the base (lowest-level) object.
Type to search

- Conga Solution
- Conga Solution Email Template
- Conga Solution Parameter
- Conga Solution Query
- Conga Solution Report
- Conga Solution Template
- Conga Solutions Settings
- Conga Template
- Connected App
- Contact**
- Contact Feed
- Contact History
- Contact Share
- Content Delivery
- Content Delivery View
- Content Document
- Content Document History
- Content Document Link
- Content Folder
- Content Folder Item

Contact

API Name:
Contact

Buttons: Next, Reset

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8. Click **Next**.

9. Click on the columns you want to display and click >> to move them to the Selected Fields area.

 Click the headers to access additional fields.

Conga Query Builder

Step 2 of 4: Select Columns

Select the columns to display in the data. Click a section header to expand that section.

Base: Contact

Search:

Available Fields:

- Other Street
- Other Zip/Postal Code
- Owner ID
- Photo URL
- Reports To ID
- Salutation
- System Modstamp

Selected Fields:

- Business Phone
- First Name
- Last Name
- Title

Lookup: Account

Lookup: Created By

Lookup: Last Modified By

Lookup: Owner

Lookup: Reports To

10 **11**

Back **Next**

- Click **Next**.
- Set the **Field** dropdown to the ID of the object where your button resides.
- Set the **Operator** dropdown to equals.

Conga Query Builder

Step 3 of 4: Choose the Selection Criteria

Enter the selection criteria:

Field	Operator	Value	
Account ID	equals		AND
--None--	equals		AND
--None--	equals		AND
--None--	equals		AND
--None--	equals		

Choose the sort order:

Field	Direction
--None--	ASC
--None--	ASC
--None--	ASC

Number of rows to display:

Back **Next**

- Leave the **Value** field blank.
- (Optional) Choose a sort order and number of rows to display.
- Click **Next**.
- On the resulting page, you see your SOQL statement.



You can specify additional selection criteria if needed.



You can also test your query from this page.

17. (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 set to allow pop-ups from Salesforce.

18. When you have completed testing, click **Save**.



If you manually edit the SOQL query generated by the Query Builder, do not use the Query Builder again for that record because your edits are overwritten.

EXAMPLE

Let's say you want to access contact information for accounts. To create that query you would:

1. Click All Tabs.
2. Click Conga Queries.
3. Click New.
4. Type a Account Contacts for the name and Gather contact information for accounts for the description.
5. Leave the SOQL Select Statement field blank.
6. Click Save.
7. Click Conga Query Builder.
8. Click **Contact**.
9. Click **Next**.
10. Click on the columns you want to display and click >> to move them to the Selected Fields area.

Let's move the following:

- Business Phone
- First Name
- Last Name
- Title

-
11. Click **Next**.
 12. Set the **Field** dropdown to Account ID.
 13. Set the **Operator** dropdown to equals.
 14. Leave the **Value** field blank.
 15. Click **Next**.
 16. Your SOQL statement is displayed.

SELECT Phone, FirstName, LastName, Title FROM Contact WHERE AccountId = '{pv0}'

17. To test your query, enter an Account ID in the pv0 field.

 If you do not wish to test your query, skip to step 21.

18. Click **Preview**.
 19. In the pop-up window you should see the first 20 rows of contacts associated with the Account ID.
 20. Close the pop-up window.
 21. Click **Save**.
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