

Composer Profile Permissions Standard View

Go to Salesforce Setup > Administer > Manage Users > Profiles > Select the Profile Name you want to change (e.g. Business Analyst) > Edit.

Starting from the top of the page, change the following:

Custom App Settings

Select the following check boxes to make them visible. This is not required but enabling it will allow the profile to see the Conga® apps in the *Salesforce Custom App* menu.

Conga Courier® is a separate Conga application that allows for scheduled email delivery of Salesforce reports; it is not discussed in this article.

- Conga Composer
- Conga Batch® (if Conga Batch is installed)
- Conga Mail Merge® (if Conga Mail Merge is installed)
- Conga Trigger® (if Conga Trigger is installed)

	Visible	Default
App Launcher	<input checked="" type="checkbox"/>	<input type="radio"/>
Call Center	<input checked="" type="checkbox"/>	<input type="radio"/>
Community	<input checked="" type="checkbox"/>	<input type="radio"/>
Conga Composer	<input checked="" type="checkbox"/>	<input type="radio"/>
Conga Conductor	<input checked="" type="checkbox"/>	<input type="radio"/>
Conga Courier	<input checked="" type="checkbox"/>	<input type="radio"/>
Conga Mail Merge	<input checked="" type="checkbox"/>	<input type="radio"/>
Conga Workflow	<input checked="" type="checkbox"/>	<input type="radio"/>

Connected App Access

If the profile is using the Conga Composer OAuth buttons, enable Conga Composer as a Connected App by selecting the check box.

Tab Settings

Custom Tab Settings - "Default On" is the recommended setting, however is not a required permission for end users; enabling it will simply allow a user to see the Conga tabs. We do require this permission for System Administrators, as it is needed for maintenance and troubleshooting of solutions.

- About Conga Composer
- Conga Composer Setup
- Conga Templates
- Conga Email Templates
- Conga Queries
- Conga Resources
- Conga Mail Merge (if Conga Mail Merge is installed)
- QuickMergeSM Links (if Conga QuickMerge is installed)

If Conga Batch is installed, we recommend enabling its tabs as "Default On." These tabs are required as "Default On" for System Administrators.

- About Conga Batch
- Conga Batches
- Conga Batch Setup
- Conga Batch Dashboard

If Conga Trigger is installed, we recommend enabling its tabs as "Default On." These tabs are required as "Default On" for System Administrators.

- About Conga Trigger
- Conga Trigger Setup
- Conga Trigger Formula Builder
- Conga Trigger Dashboard



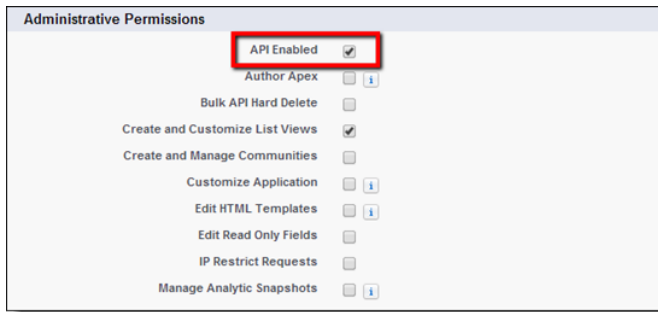
The screenshot displays the 'Custom Tab Settings' window, which is organized into two columns. Each row represents a different Conga feature, with a dropdown menu to its right indicating the current setting. The settings are as follows:

Feature	Setting
About Conga Composer	Default On
About Conga Conductor	Default On
About Conga Mail Merge	Default On
About Conga Workflow	Default On
Conductor Dashboard	Default On
Conductor Setup	Default On
Conga Composer Setup	Default On
Conga Conductors	Default On
Conga Email Templates	Default On
Conga Mail Merge	Default On
Conga Queries	Default On
Conga Resources	Default On
Conga Templates	Default On
Courier Schedules	Tab Hidden
Courier Setup	Tab Hidden
Escalations	Default On
QuickMerge Links	Default On
Workflow Dashboard	Default On
Workflow Formula Builder	Default On
Workflow Setup	Default On

Administrative Permissions

Select the **API Enabled** check box. This is a required permission for anyone using Conga Composer.

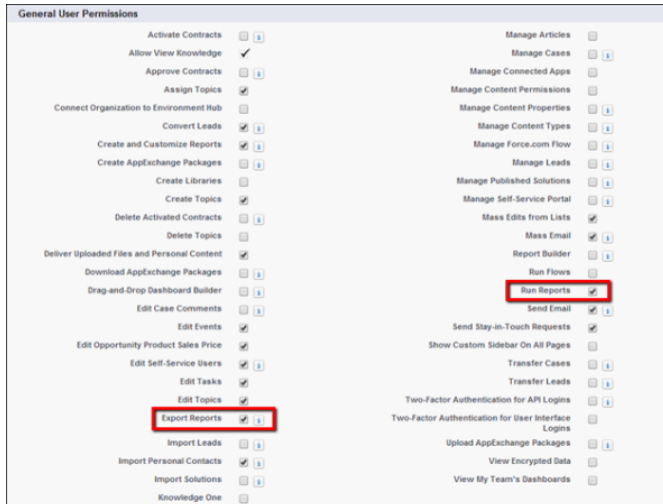
- API Enabled.



General User Permissions

Select the following check boxes; both are required for any users who are using reports as part of their Conga Composer solution.

- Export Reports
- Run Reports



Standard Object Permissions

Documents

- *Create* permission is required on the Documents object in order for a user to utilize email functionality with Conga Composer. Delete permission is also highly recommended for the Documents object.
- The Documents object is used in Conga Composer as a temporary holding area for the merged output file while the email is assembled. The *Create* permission allows a user to utilize this functionality while the *Delete* permission ensures that each document that is created by a user is subsequently replaced the next time that user initiates a Conga Composer email process.

Standard Object Permissions						
The permissions defined here control access at the object level. Access to individual records within that object type is controlled by record-level permissions. You can create different groups of permissions for individual contributors, managers, and administrators. How do I choose?						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coaching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedback	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedback Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Provide at least Read access (Create, Edit, Delete, View All, and Modify All are not required for end-users and can be enabled at your discretion) for the following objects. Read, Create, Edit, and Delete permissions are required for Conga Email Staging.

- Conga TemplatesSM

Conga Templates is a custom object that allows you to store your document (Word[®], Excel[®], PowerPoint[®], or PDF) templates.

- Conga Email TemplatesSM

Conga Email Templates is a custom object that allows you to build and store HTML email templates for use in your merge operation, whether as the primary destination for merged data or used in conjunction with a document template.

- Conga Email StagingSM - requires Read, Create, Edit, and Delete permissions

Conga Email Staging is a component of Conga Email; Read, Create, Edit, and Delete permissions are required for any profile using Conga Email.

- Conga QueriesSM

Conga Queries is a custom object that allows you to build and store SOQL queries to retrieve data for use in your merge operation.

- Conga Batch (if Conga Batch is installed)

Conga Batch is an optional, paid add-on to Conga Composer that launches on-demand or scheduled Conga Composer solutions in batches.

- Conga Trigger (if Conga Trigger is installed)

Conga Trigger is an optional, paid add-on to Conga Composer that launches Conga Composer operations as the result of a Salesforce Conga Trigger rule.

- QuickMerge LinksSM (if Conga QuickMerge is installed)

Conga Quick Merge Links is an optional, free add-on to Conga Composer that helps automate Composer and Conga Mail Merge solutions by expanding the scope of how they can be launched.

- Scheduled Conga Batch HistorySM (if Conga Batch is installed)

Scheduled Conga Batch History is a child object of Conga Batch and displays details of past scheduled Conga Batch routines.

Custom Object Permissions							Custom Object Permissions						
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Conga Conductors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Counter Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Email Staging	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Escalations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Email Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	QuickMerge Links	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Queries	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled Conductor History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



In addition to providing access to Objects, ensure Profiles have access to all necessary fields on the custom Conga Objects as well as fields on other Objects from which you are merging data.