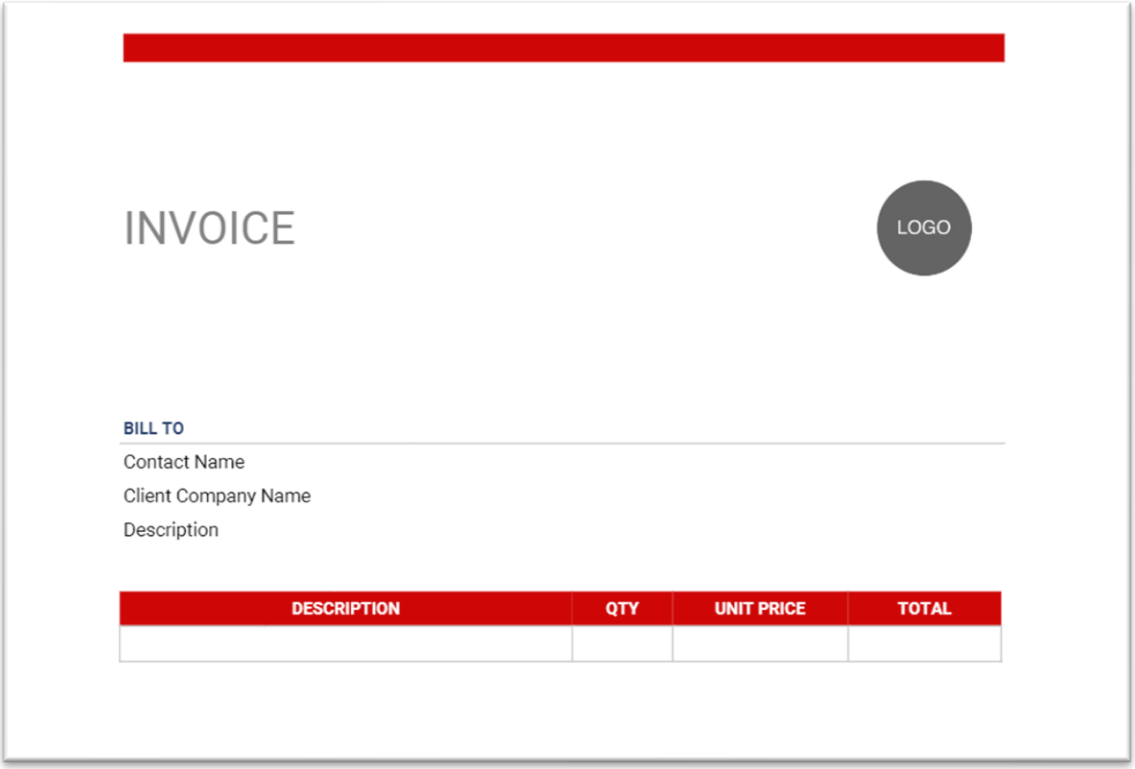
Steps to Create a Quote in Salesforce Using Conga Composer



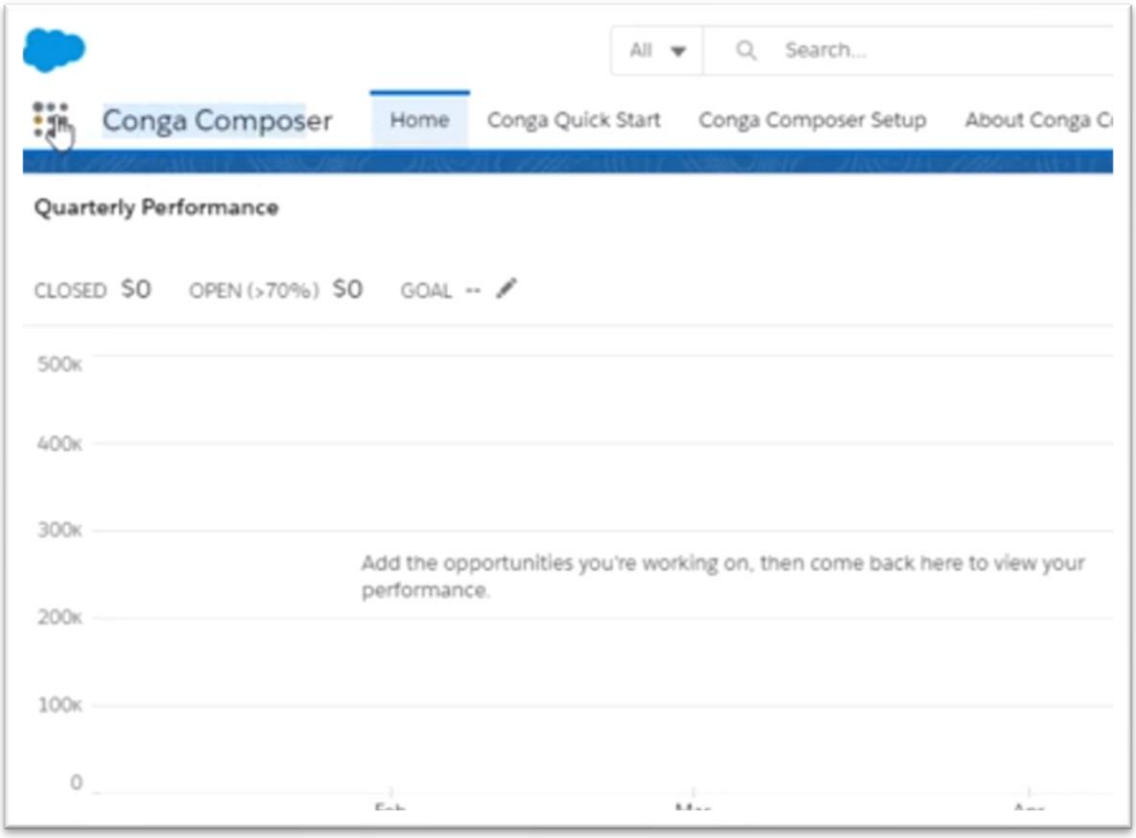
Here we present the complete sequence of steps it takes to create a simple quote in Salesforce using the Conga Composer (you can also check the video). As you'll see below the steps involved are often complex for a business user and involves toggling between tabs frequently.

But before we get into these steps, first we need to create a skeleton document that can be uploaded to the Salesforce account later.

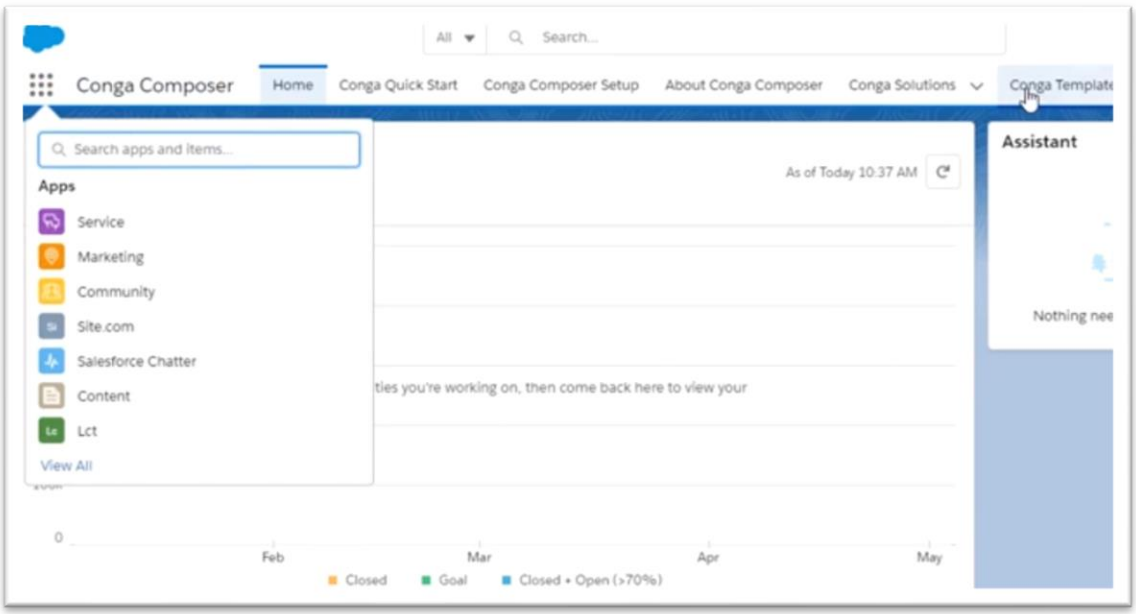
A skeleton quote document like the one below contains all the columns and format we need (indeed, without the data merged).

Remember, you need to first create this document in your Local system.

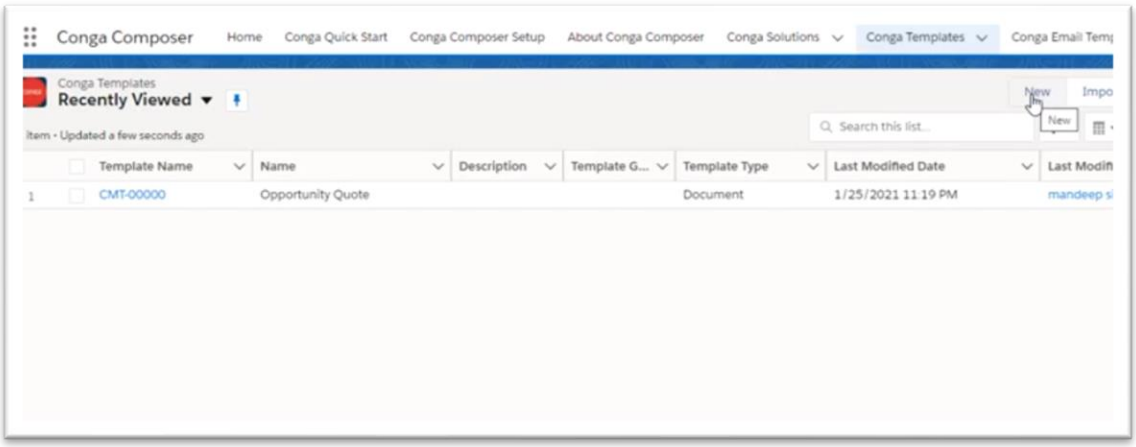
Step 1: Login to Salesforce and Navigate to Conga Composer app using app Launcher



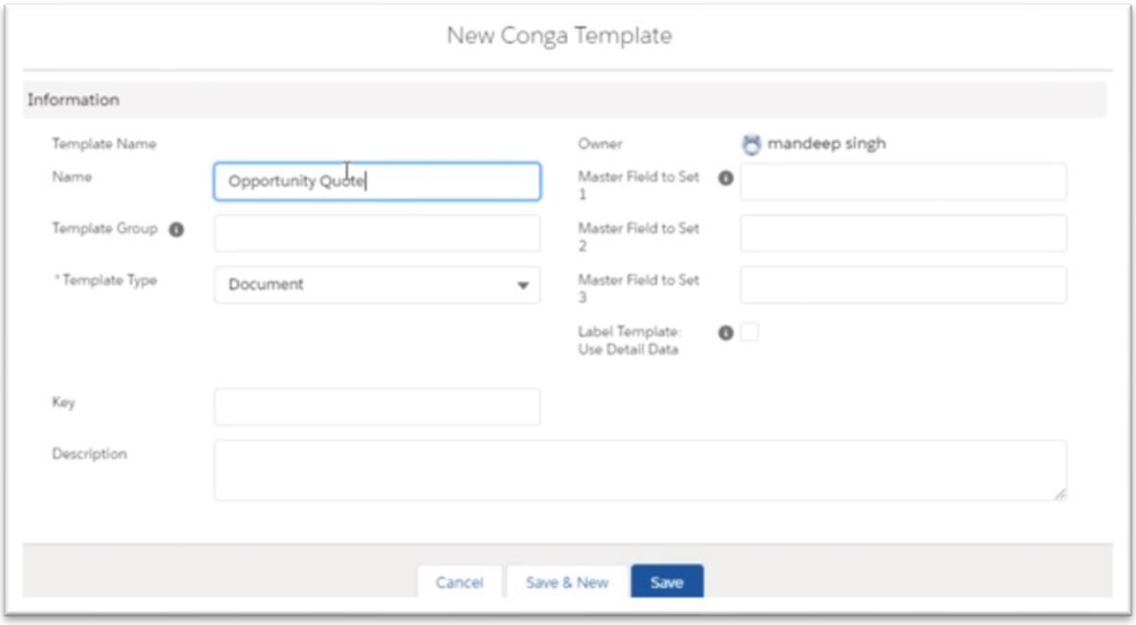
Step 2: Now Go to Conga Templates (towards the far right)



Step 3: And click on ‘New’ to create a new template

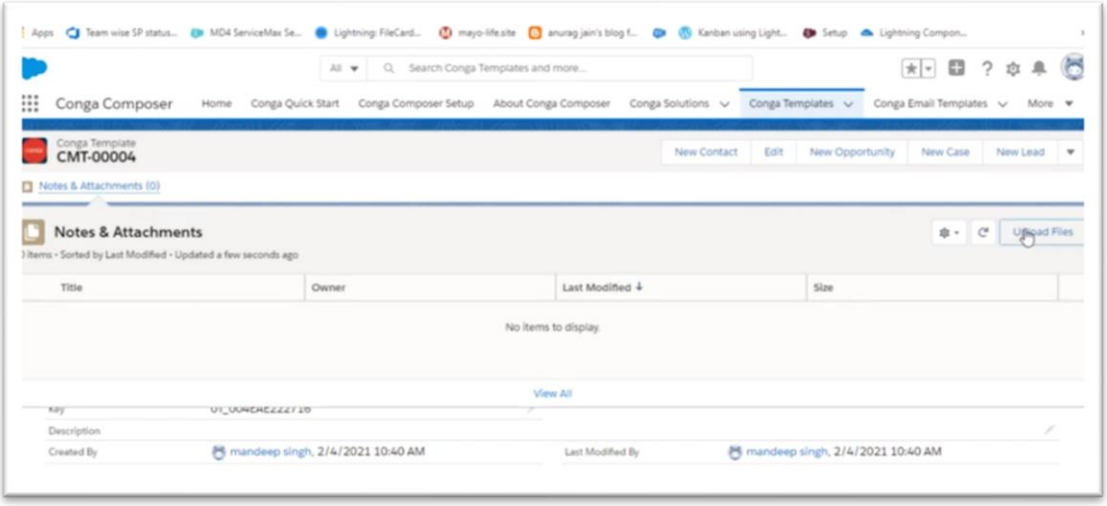


Step 4: Give a name to the Template and select Template Type as Document from the dropdown menu and click Save.

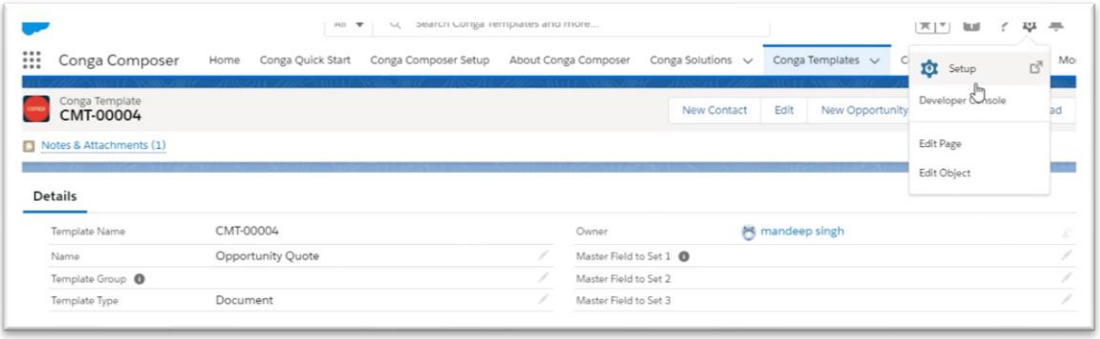


(Rest of the fields are optional)

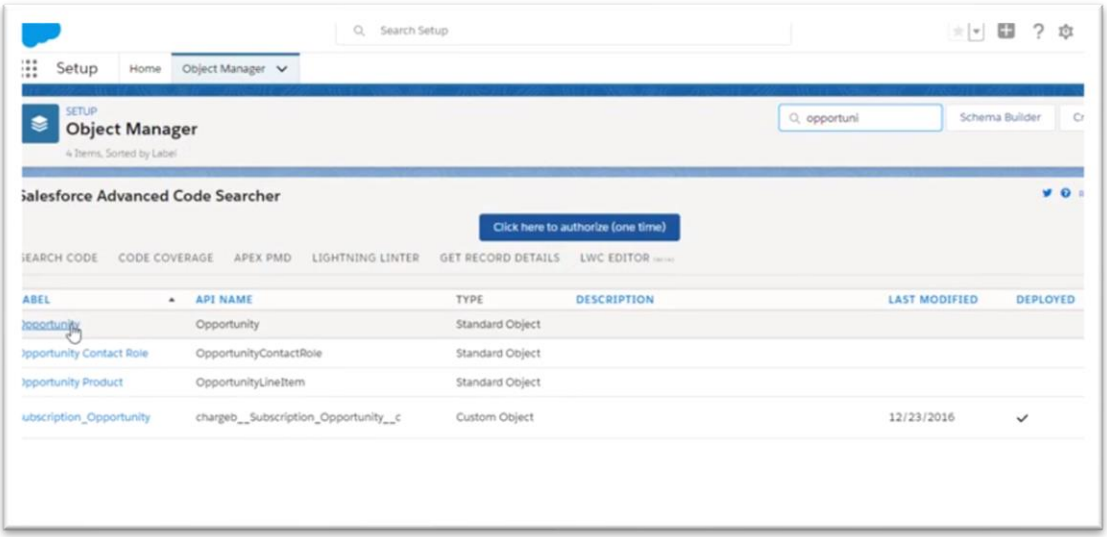
Step 5: Now add an attachment (the skeleton quote in this case as seen above) to this new record by clicking Upload files in Notes & Attachments



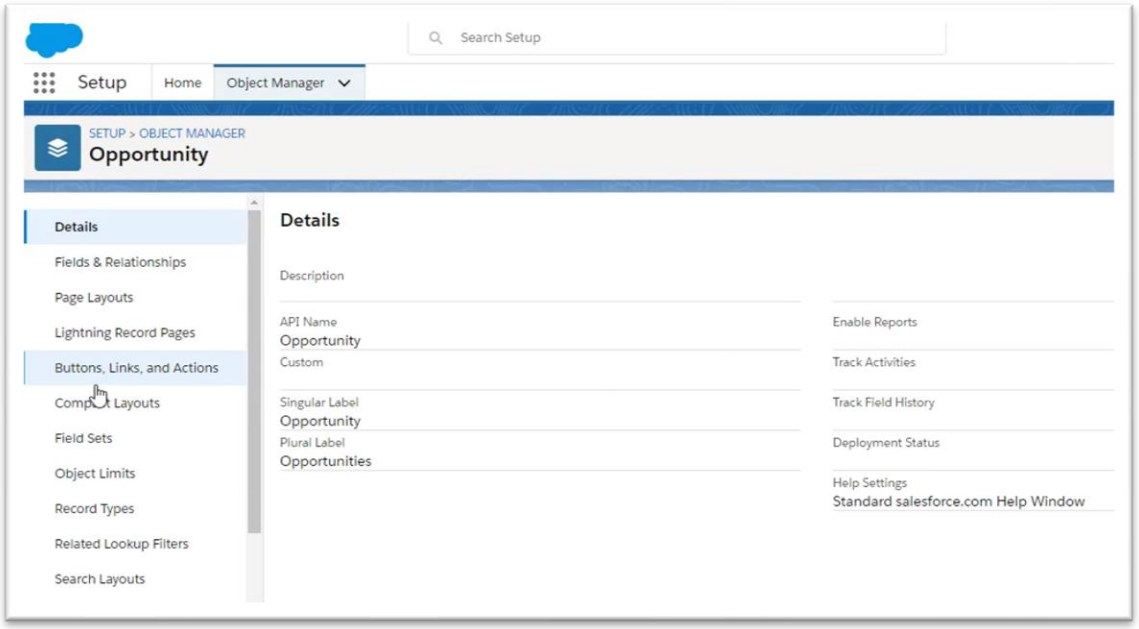
Step 6: The next step is to click on Setup to create a button through which we will call Conga to create the final document

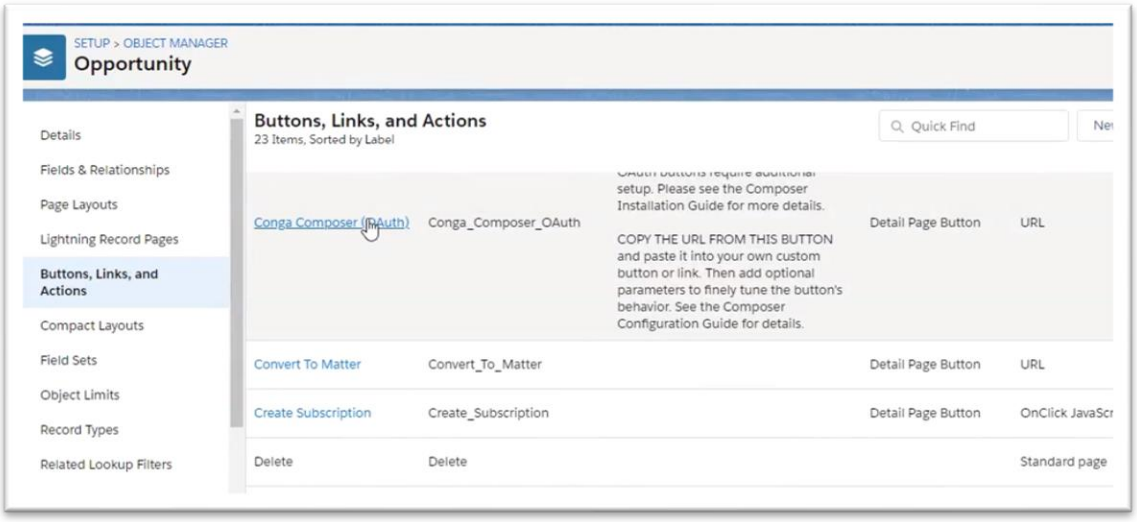


Step 7: Search for the object and click on it (in this case it will be the opportunity)

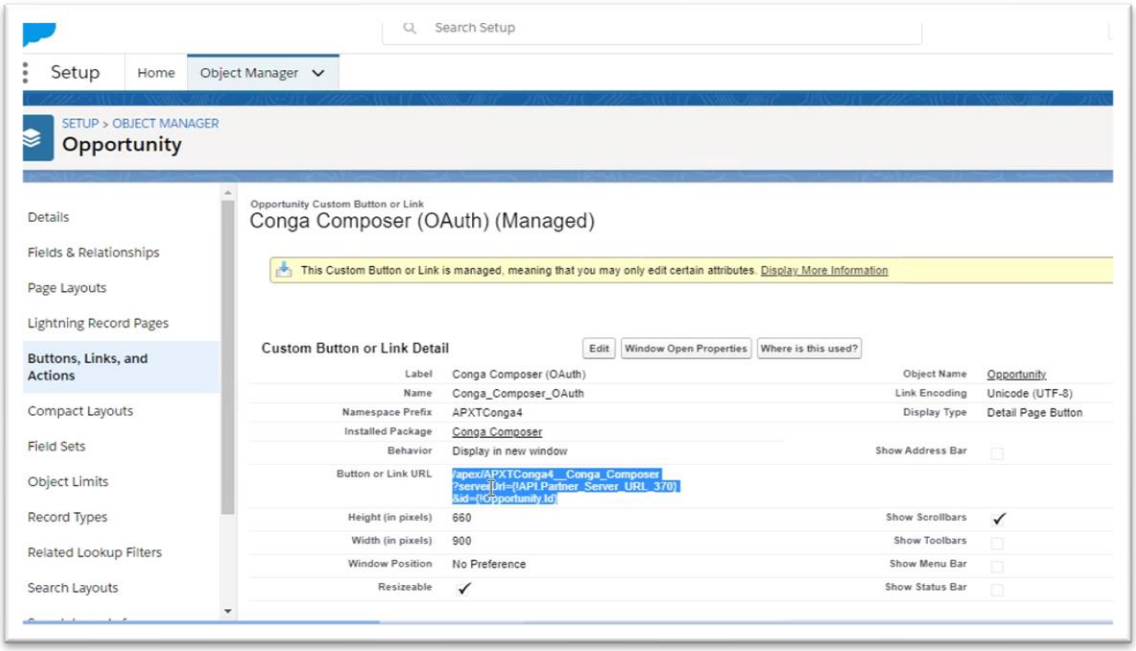


Steps 8 & 9: Now click on Buttons, Links, and Actions and search for Conga Composer (OAuth)

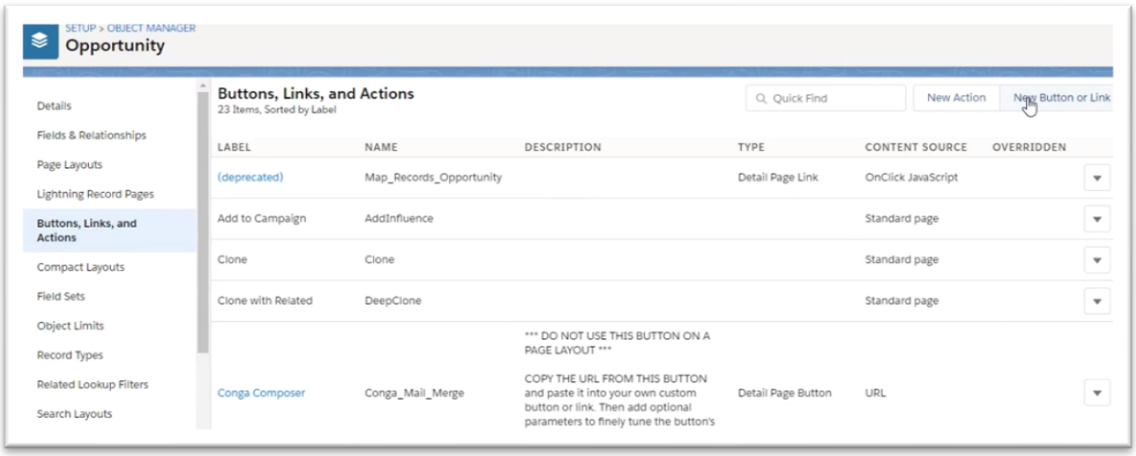




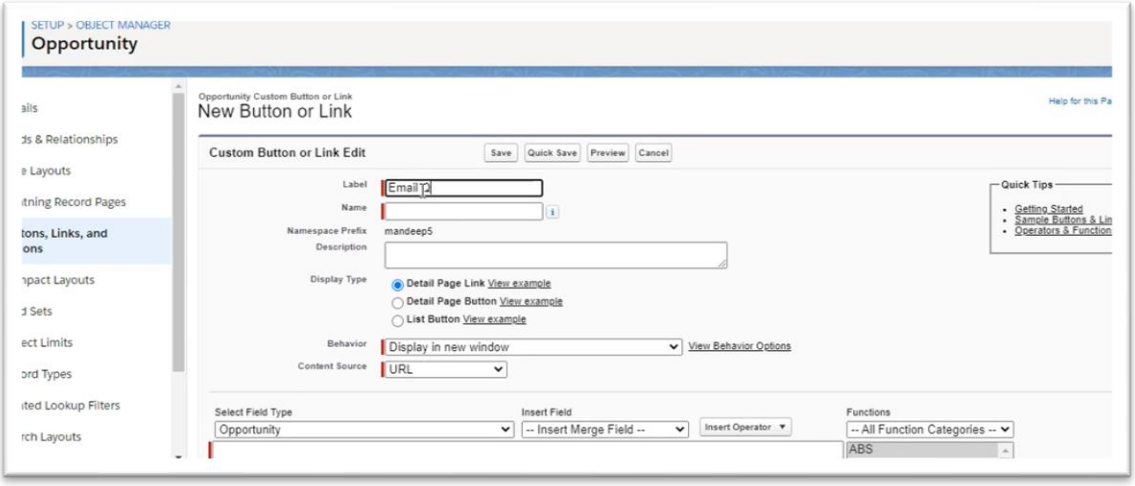
Step 10: You need to copy the URL and paste it into your custom button or link. You may add optional parameters to fine tune the button's behavior

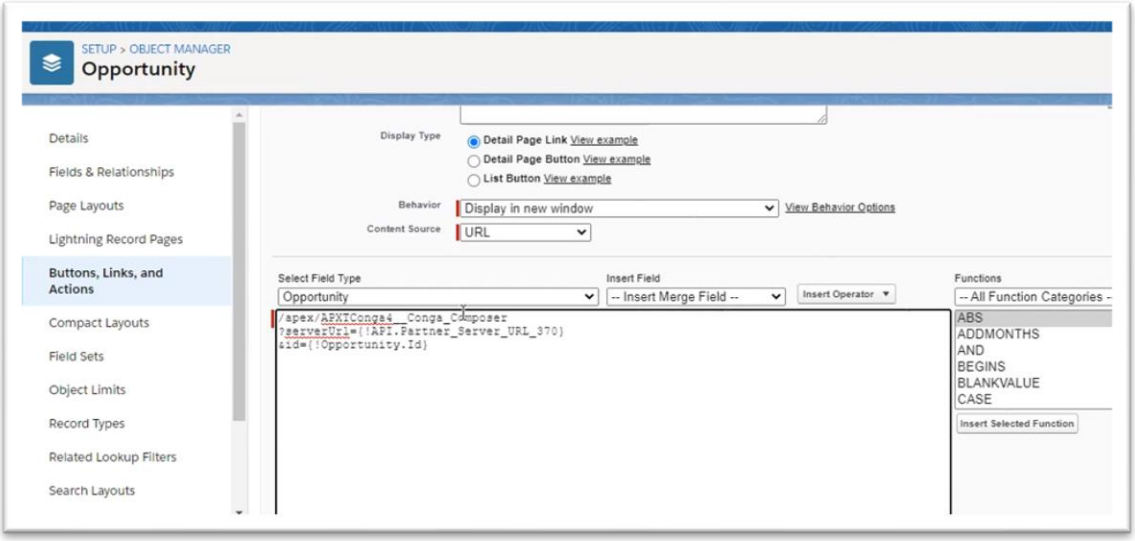


Step 11: Click on Buttons, Links, and Actions again and then click on New Button or Link option



Steps 12 & 13: Label and name the button and paste the URL you copied in Step 10 and you need to add the ID of template you created earlier (by copy-pasting the template ID) and click on Save





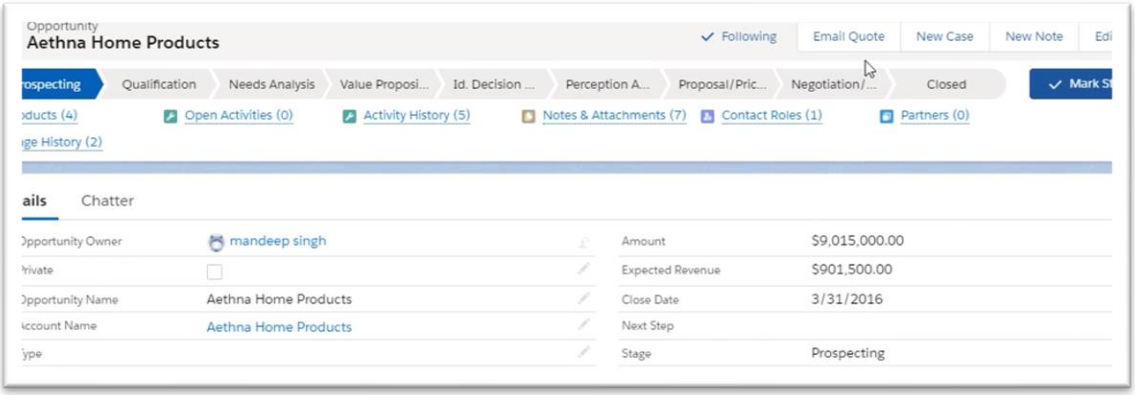
You may also add other parameters like parent record Id, Conga Email Template Id (if you are using conga to send out email) etc.

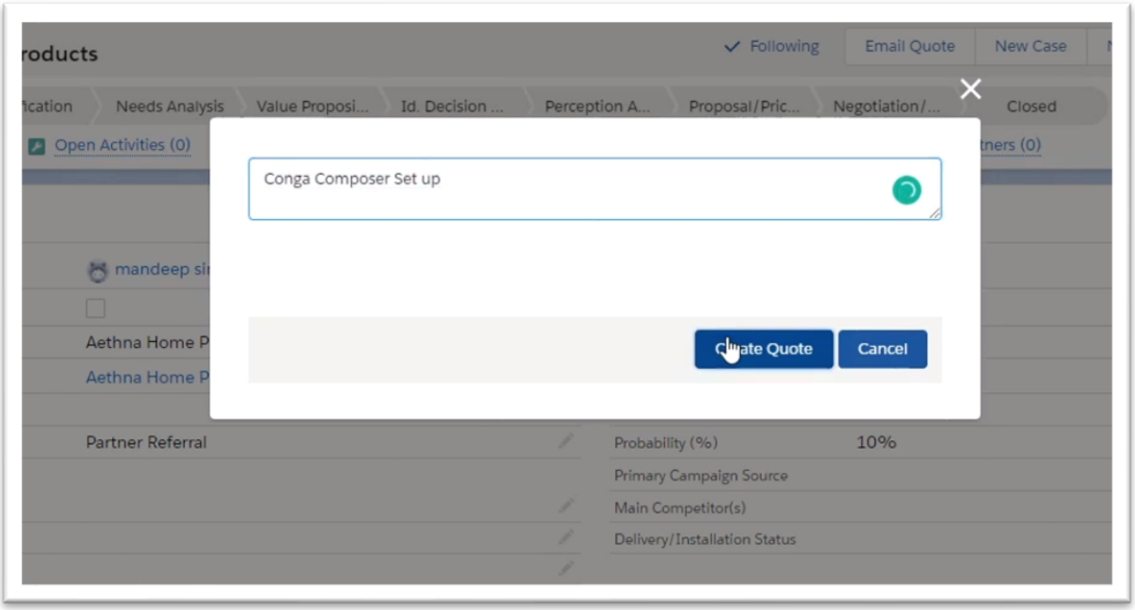
Note - Don't include DS7=1 parameter in the URL for now as we need to update the skeleton document in set up.

Button Properties:

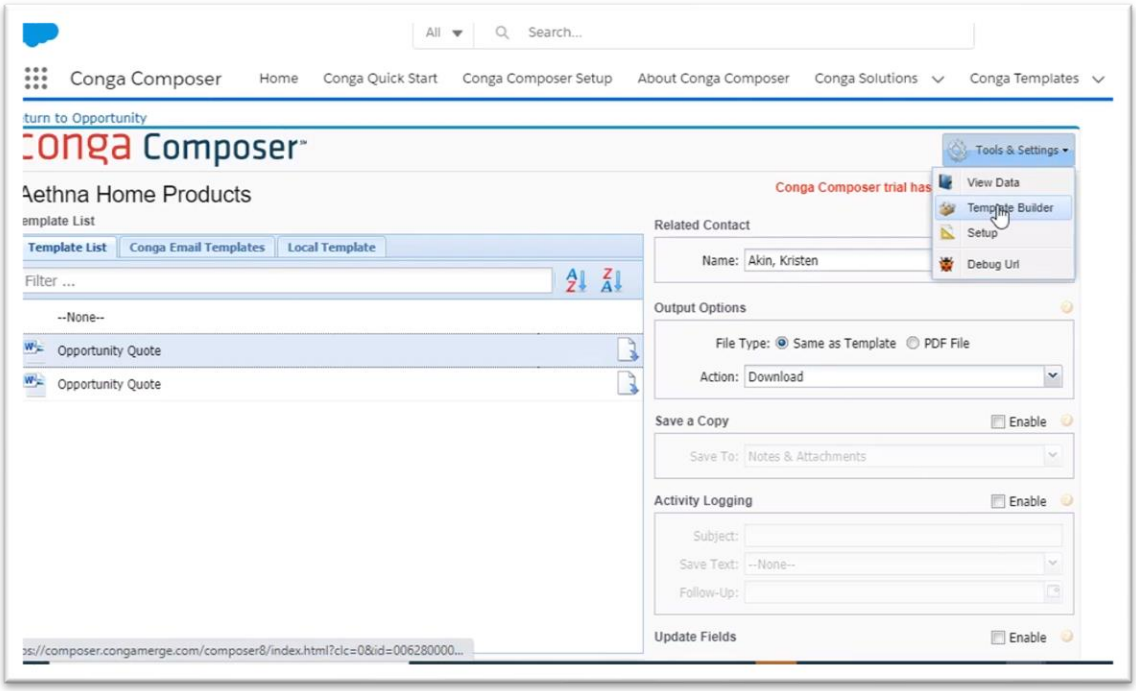
- Click Window Open Properties, set the Height to 660 and Width to 900, and then click Save.
- Add your button to the object's page layout. The button is available from the button drop-down list on the record.
- (Optional): To make the button visible on the record itself, add the button to the Salesforce1 and Lightning Experience Actions section on the page layout. Drag and drop the button to the Salesforce1 and Lightning Actions section].

Steps 14 & 15: Now that the button got added to the page layout (Email Quote in this case), click on it and pass the details that will serve as the description and click on Create Quote





Step 16: Once loaded, it opens up Conga set up screen, and you can now click on Template Builder under Tools & Settings option towards the top right. This will display the data merge fields syntax that you can copy paste in the skeleton document fields.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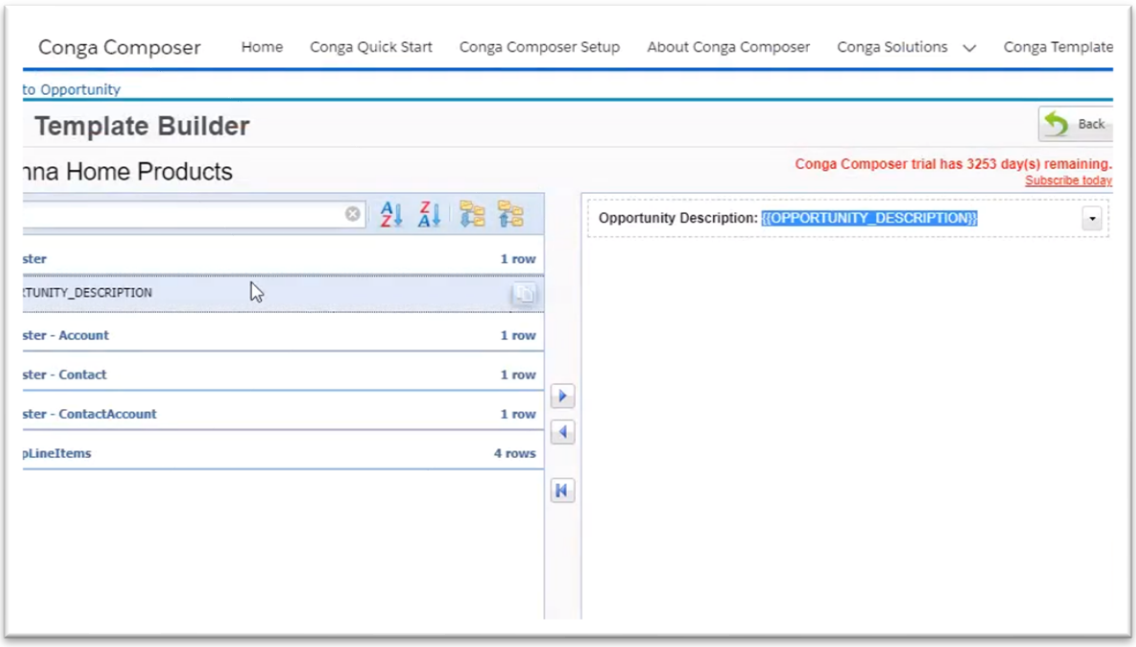
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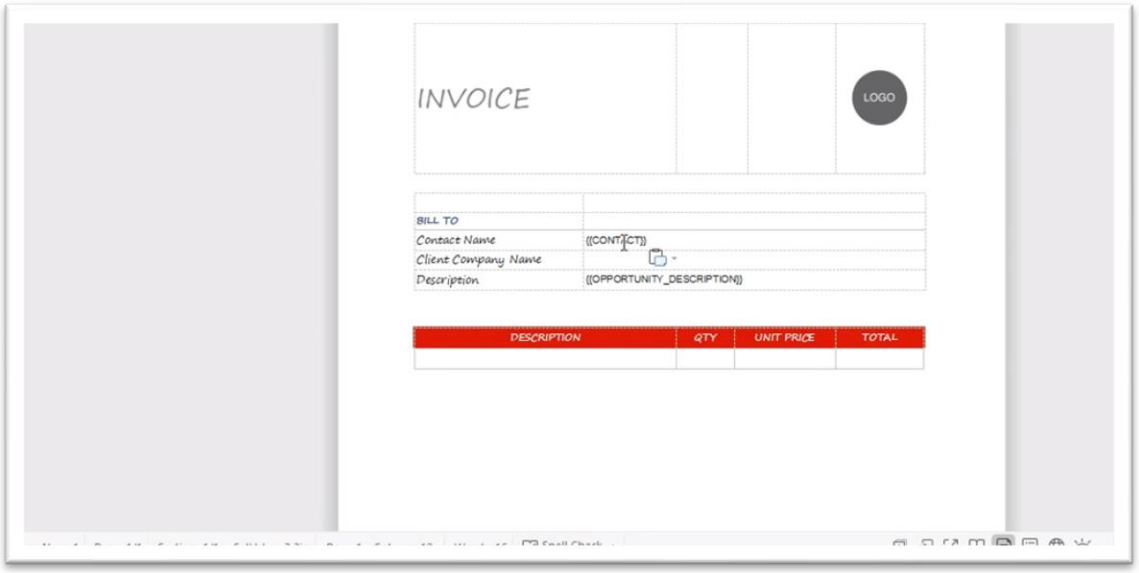
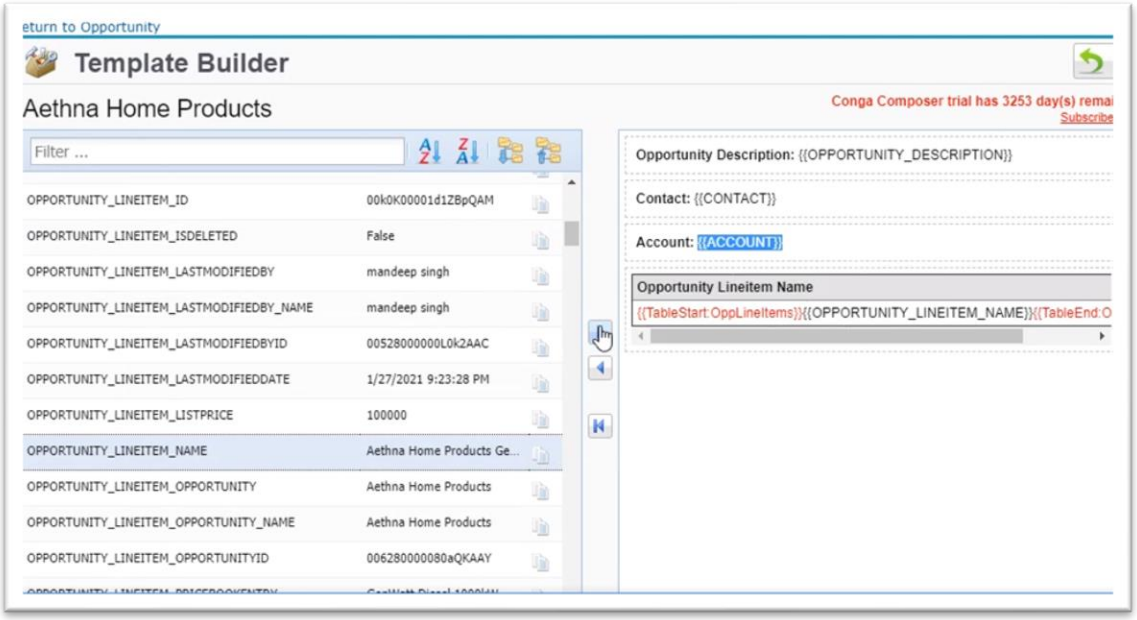
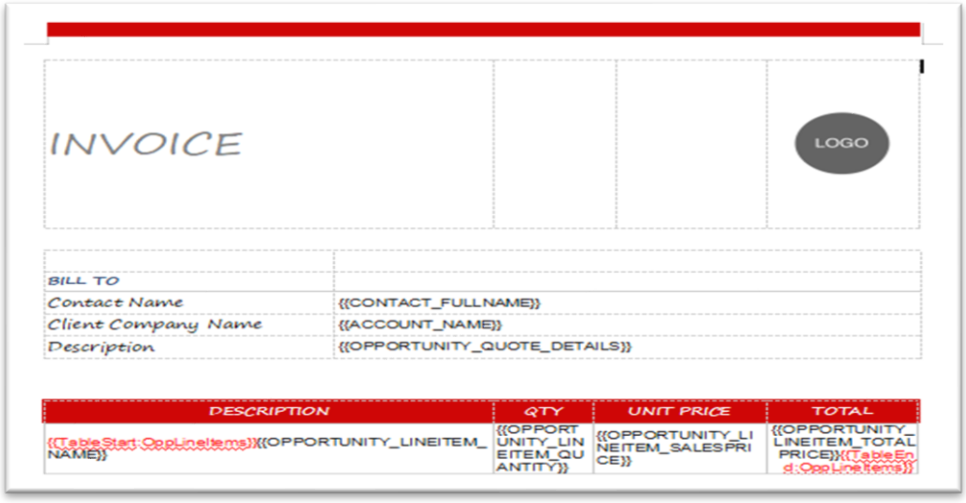


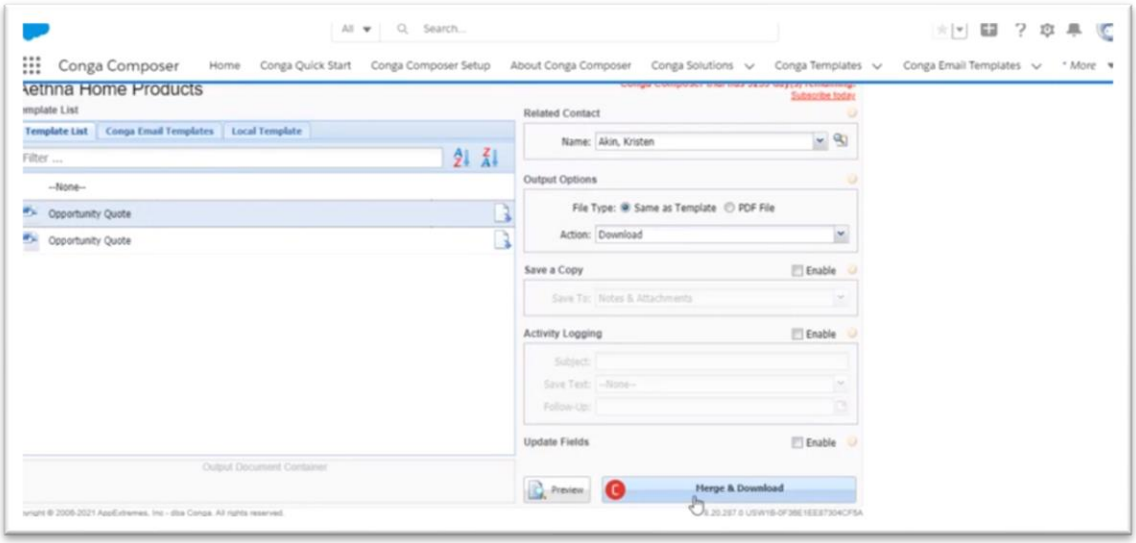
Start copying the field mapping syntax for fields to be shown in the final document and paste them in the skeleton document and finally click on save



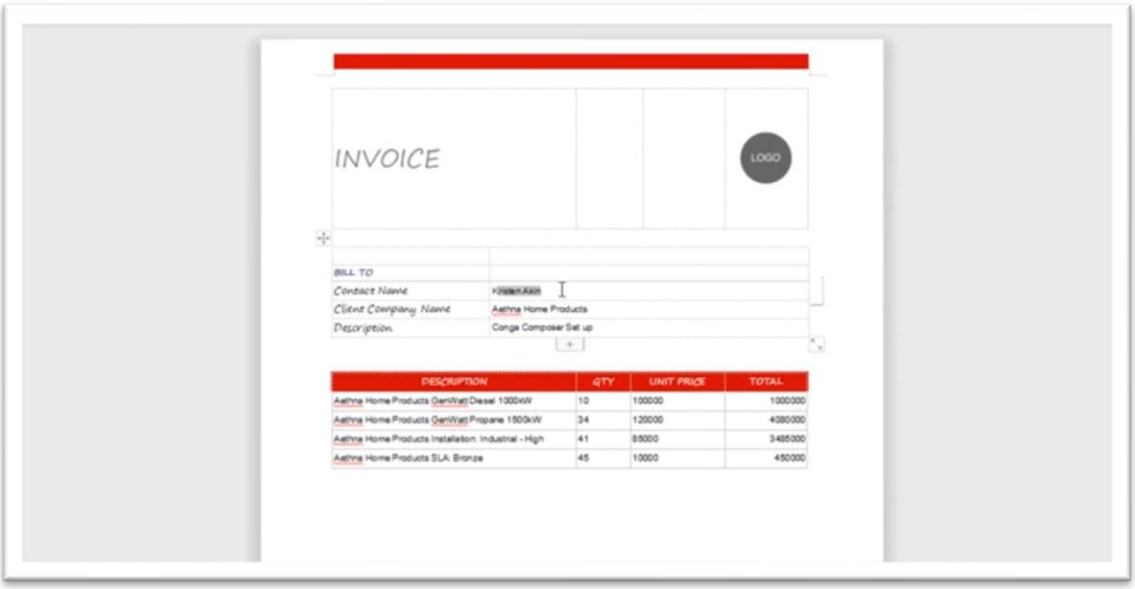
The final look of the skeleton document will be like this:



Step 17: Now you can add this final document to Conga Template record we created in step 3 above by clicking on Merge & Download and update button URL to include DS7=1 parameter.



Once it is processed, this is how the final document will look like with all the dynamic fields populated with data:



INVOICE

LOGO

BILL TO	
Contact Name	Kristen Akin
Client Company Name	Aethna Home Products
Description	Conga Composer Set up

DESCRIPTION	QTY	UNIT PRICE	TOTAL
Aethna Home Products GenWatt Diesel 1000kW	10	100000	1000000
Aethna Home Products GenWatt Propane 1500kW	34	120000	4080000
Aethna Home Products Installation: Industrial - High	41	85000	3485000
Aethna Home Products SLA: Bronze	45	10000	450000