

Steps to Create a Quote in Salesforce Using Conga Composer

INVOICE

LOGO

BILL TO

Contact Name
Client Company Name
Description

DESCRIPTION	QTY	UNIT PRICE	TOTAL

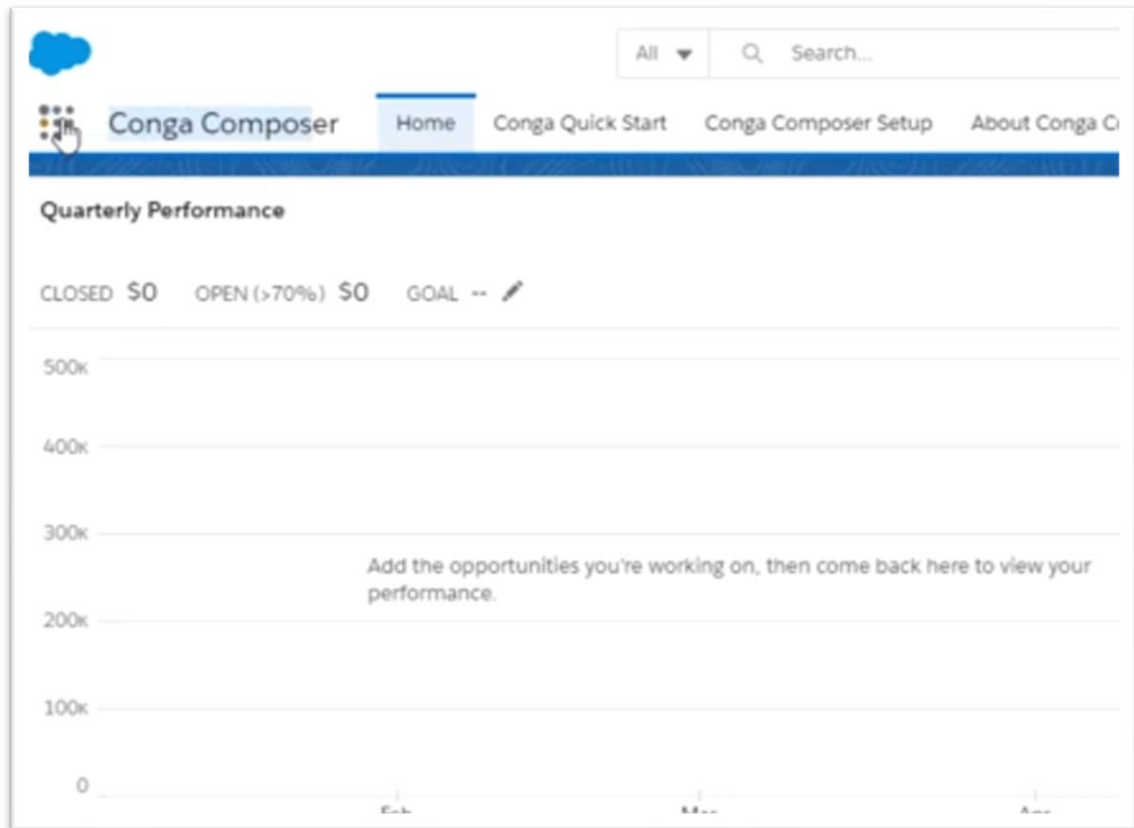
Here we present the complete sequence of steps it takes to create a simple quote in Salesforce using the Conga Composer (you can also check the [video](#)). As you'll see below the steps involved are often complex for a business user and involves toggling between tabs frequently.

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

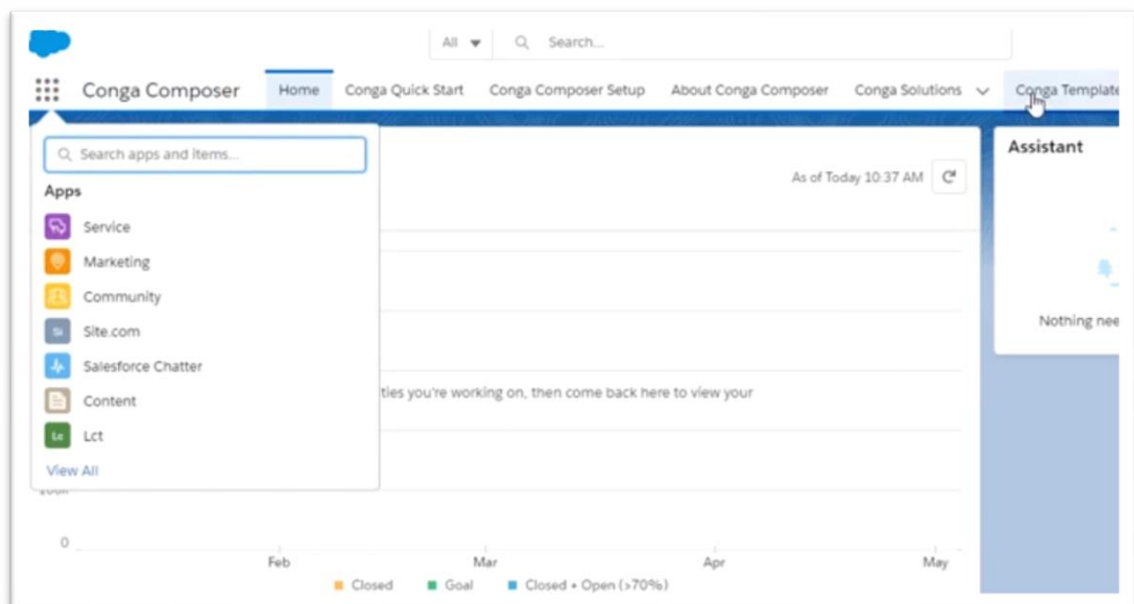
A skeleton quote document like the one below contains all the columns and format we need (indeed, without the data merged).

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

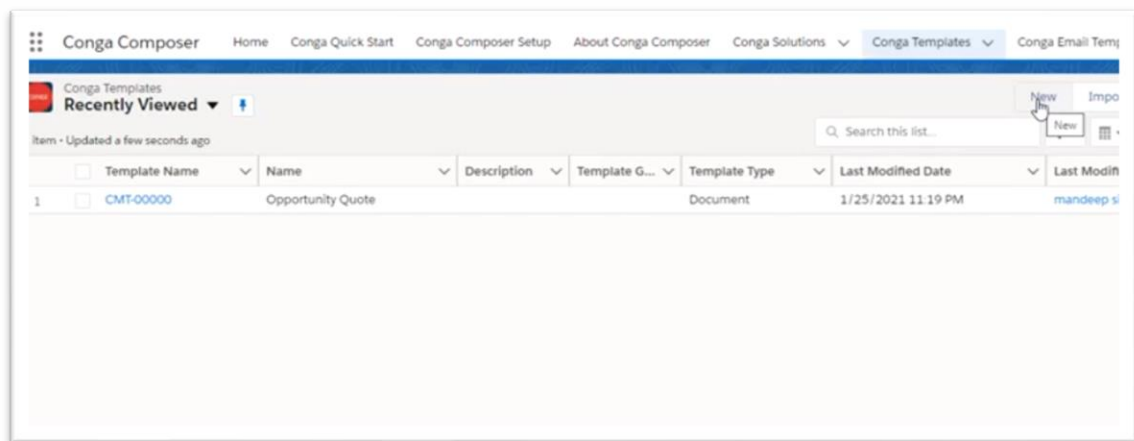
Step 1: Login to Salesforce and Navigate to Conga Composer app using app Launcher



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.

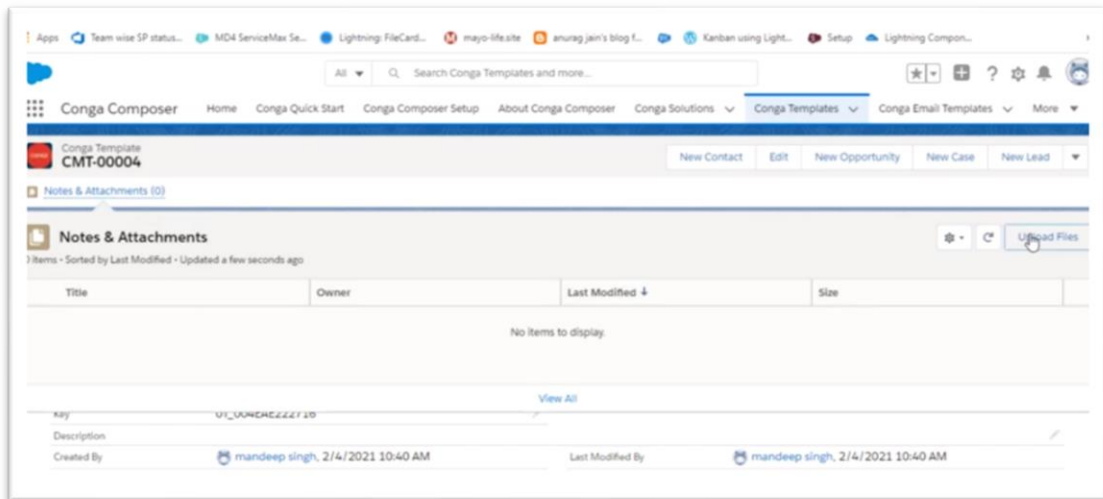
The screenshot shows the 'New Conga Template' form. The 'Information' section contains the following fields:

- Template Name: (empty)
- Name: Opportunity Quote
- Template Group: (empty)
- * Template Type: Document (selected in dropdown)
- Owner: mandeep singh
- Master Field to Set 1: (empty)
- Master Field to Set 2: (empty)
- Master Field to Set 3: (empty)
- Label Template: Use Detail Data: (checkbox unchecked)
- Key: (empty)
- Description: (empty)

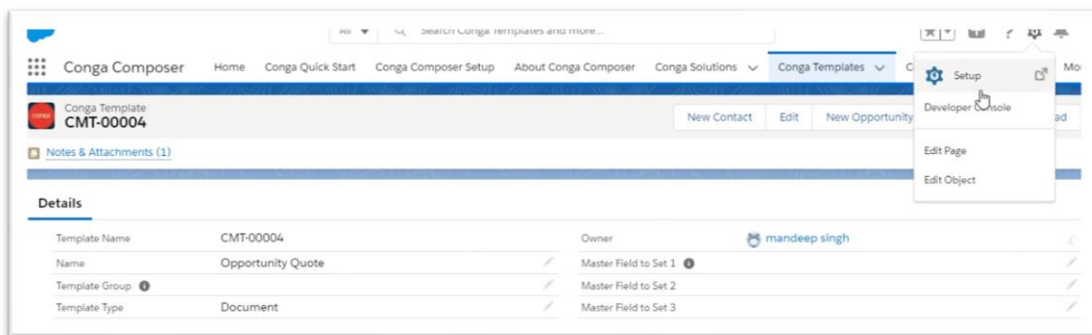
At the bottom, there are three buttons: Cancel, Save & New, and Save.

(Rest of the fields are optional)

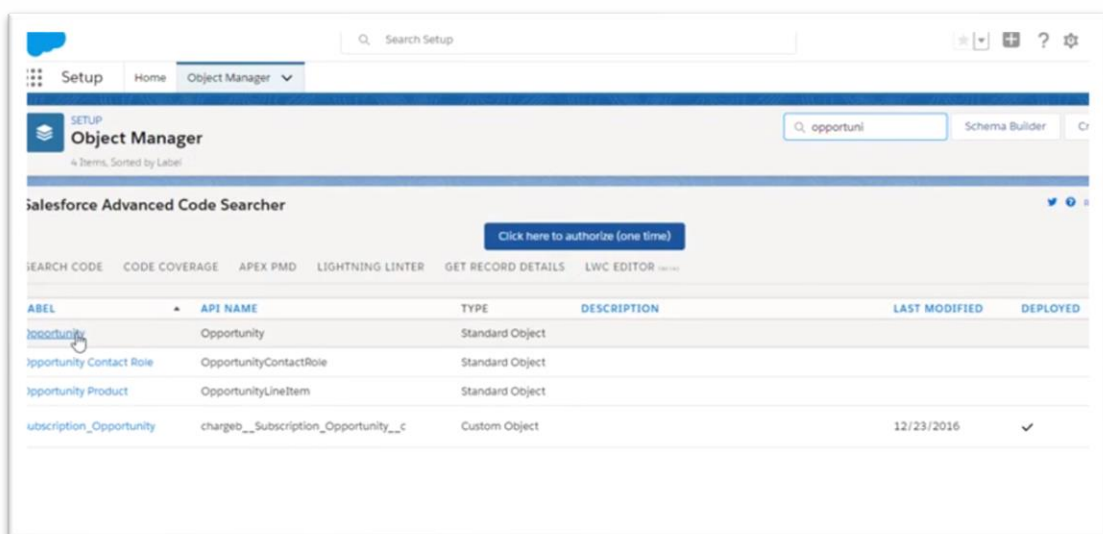
Step 5: Now add an attachment (the skeleton quote in this case as seen above) to this new record by clicking Upload files in Notes & Attachments



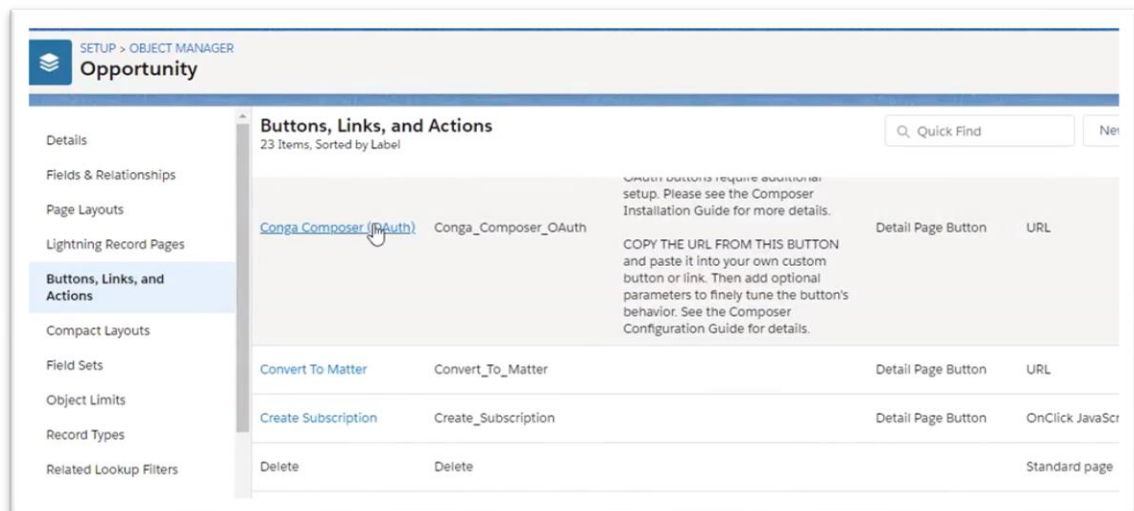
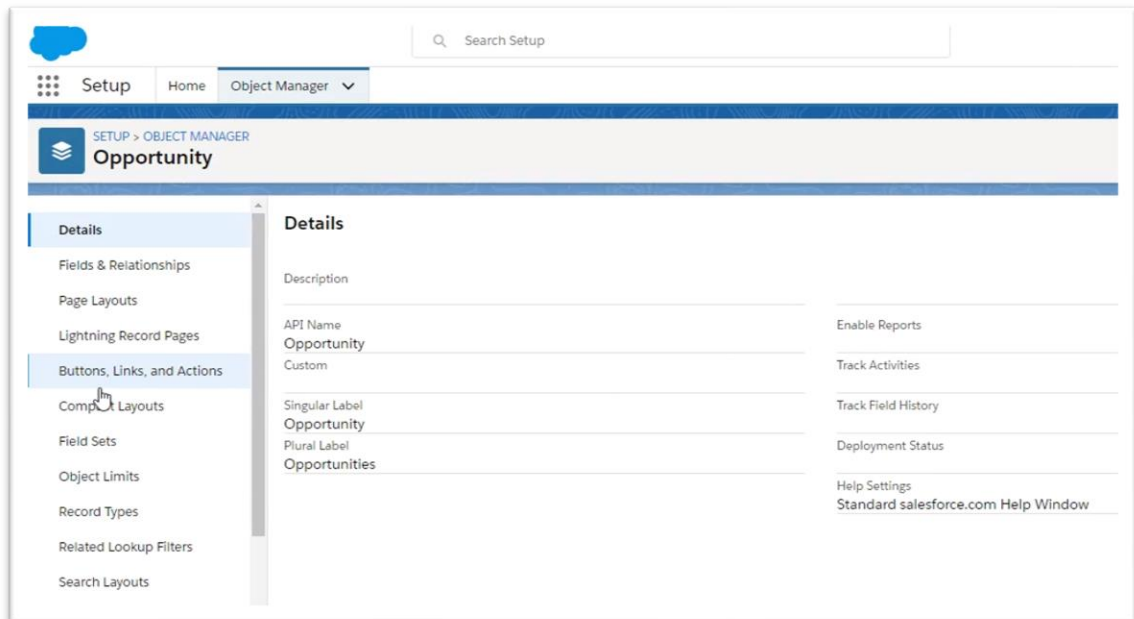
Step 6: The next step is to click on Setup to create a button through which we will call Conga to create the final document



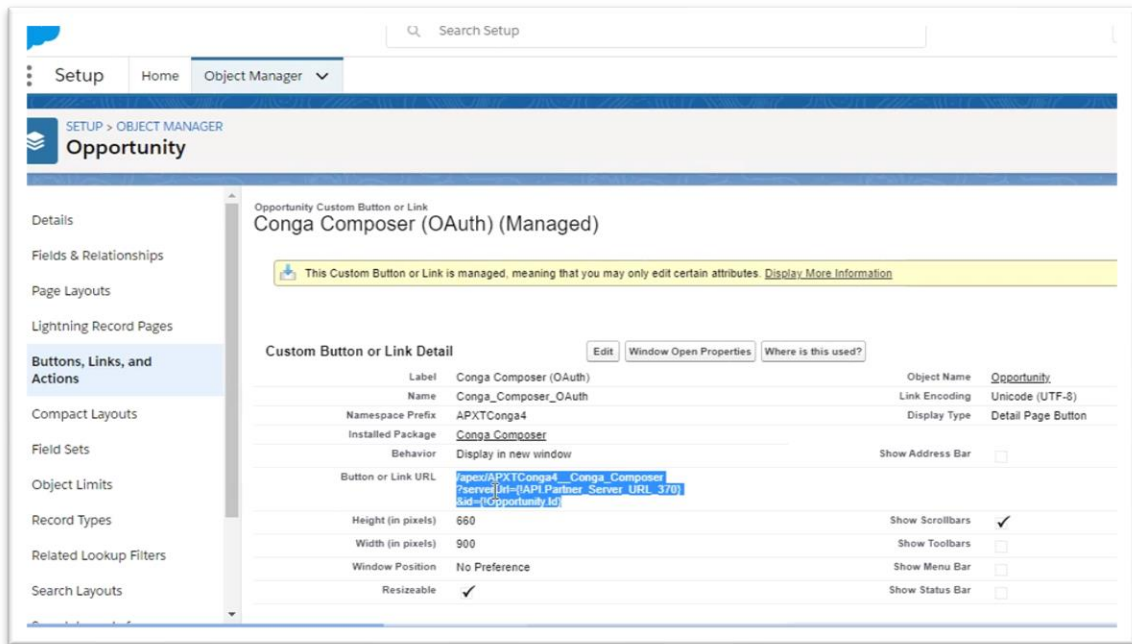
Step 7: Search for the object and click on it (in this case it will be the opportunity)



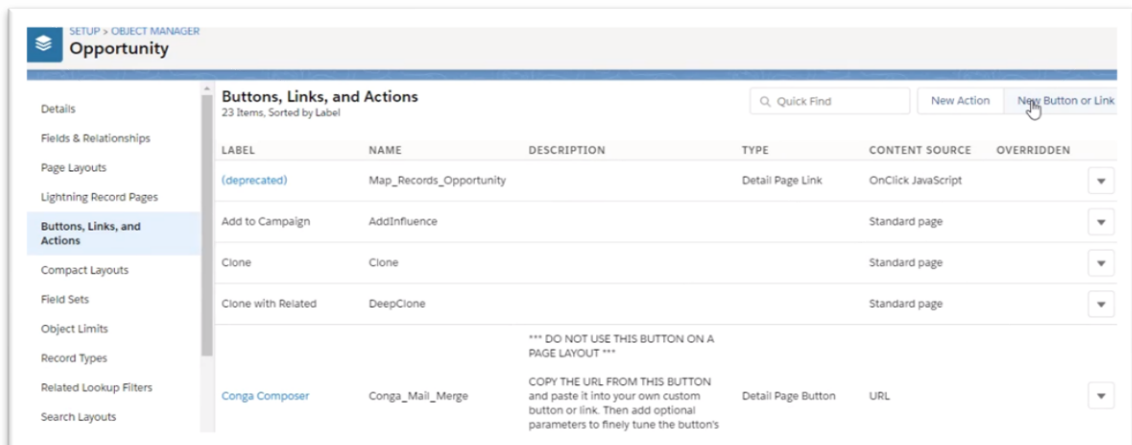
Steps 8 & 9: Now click on Buttons, Links, and Actions and search for Conga Composer (OAuth)



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

SETUP > OBJECT MANAGER
Opportunity

Opportunity Custom Button or Link
New Button or Link

Custom Button or Link Edit

Label: Email 1

Name:

Namespace Prefix: mandeep5

Description:

Display Type: ☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior: Display in new window [View Behavior Options](#)

Content Source: URL

Select Field Type: Opportunity Insert Field: -- Insert Merge Field -- Insert Operator: Functions: -- All Function Categories --

ABS

SETUP > OBJECT MANAGER
Opportunity

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Display Type: ☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior: Display in new window [View Behavior Options](#)

Content Source: URL

Select Field Type: Opportunity Insert Field: -- Insert Merge Field -- Insert Operator: Functions: -- All Function Categories --

/apex/APXTConga4_Conga_Composer
?serverUrl={!API.Partner_Server_URL_370}
&id={!Opportunity.Id}

ABS
ADDMONTHS
AND
BEGINS
BLANKVALUE
CASE
Insert Selected Function

Select Field Type: Opportunity Insert Field: -- Insert Merge Field -- Insert Operator: Functions: -- All Function Categories --

/apex/APXTConga4_Conga_Composer
?serverUrl={!API.Partner_Server_URL_370}
&id={!Opportunity.Id}&templateID='a2V0K000002GZgrUAG'

ABS
ADDMONTHS
AND
BEGINS
BLANKVALUE
CASE
Insert Selected Function

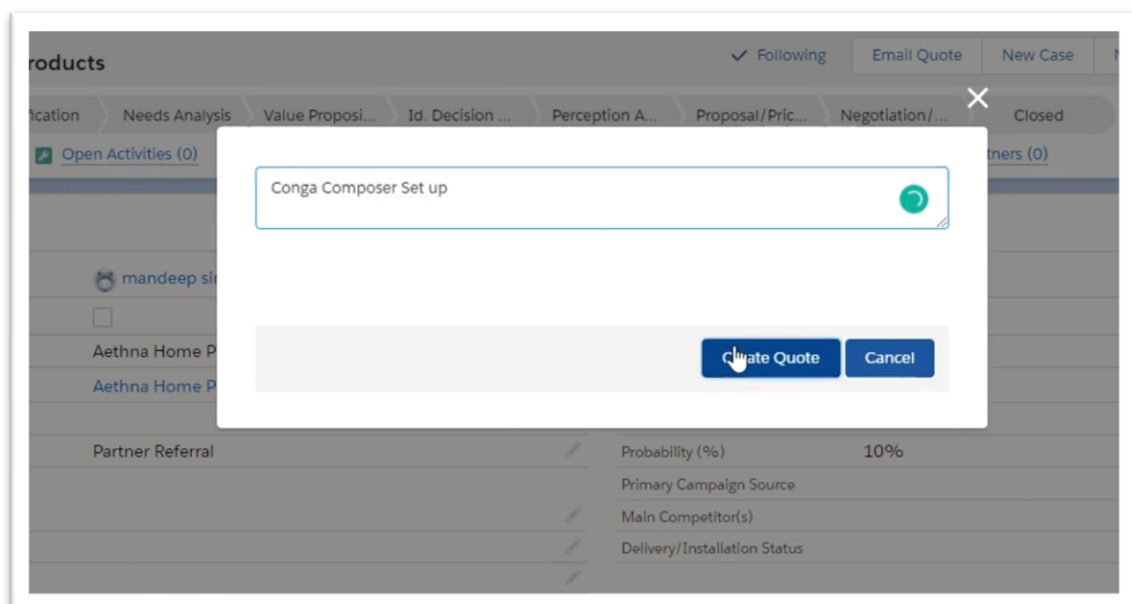
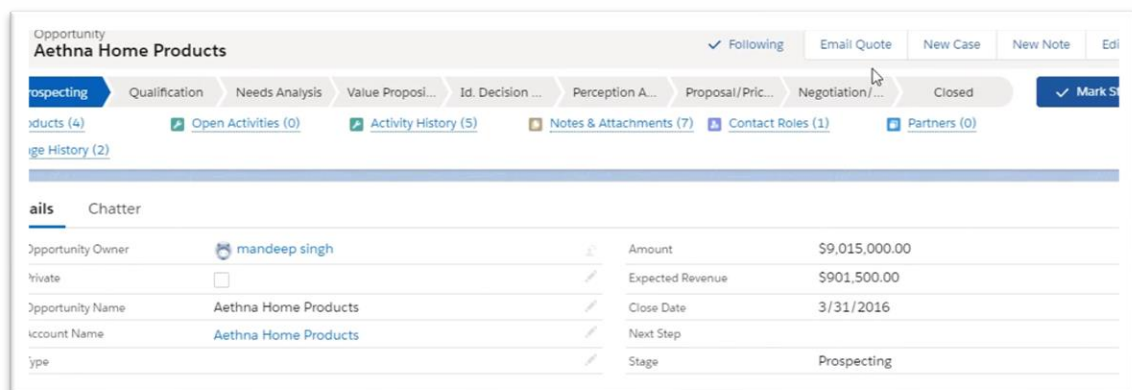
You may also add other parameters like parent record Id, Conga Email Template Id (if you are using conga to send out email) etc.

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.

Congas Conga Composer

Home Conga Quick Start Conga Composer Setup About Conga Composer Conga Solutions Conga Templates

turn to Opportunity

Congas Conga Composer™

Aethna Home Products

Template List

Template List Conga Email Templates Local Template

Filter ...

--None--

Opportunity Quote

Opportunity Quote

Related Contact

Name: Akin, Kristen

Output Options

File Type: Same as Template PDF File

Action: Download

Save a Copy

Enable

Save To: Notes & Attachments

Activity Logging

Enable

Subject:

Save Text: --None--

Follow-Up:

Update Fields

Enable

Tools & Settings

View Data

Template Builder

Setup

Debug Url

Congas Conga Composer trial has 3253 day(s) remaining. Subscribe today

ss://composer.congamerge.com/composer8/index.html?clc=0&id=006280000...

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to Opportunity

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Aethna Home Products

Template Builder

Opportunity Description: [[OPPORTUNITY_DESCRIPTION]]

ster

1 row

ITYUNITY_DESCRIPTION

ster - Account

1 row

ster - Contact

1 row

ster - ContactAccount

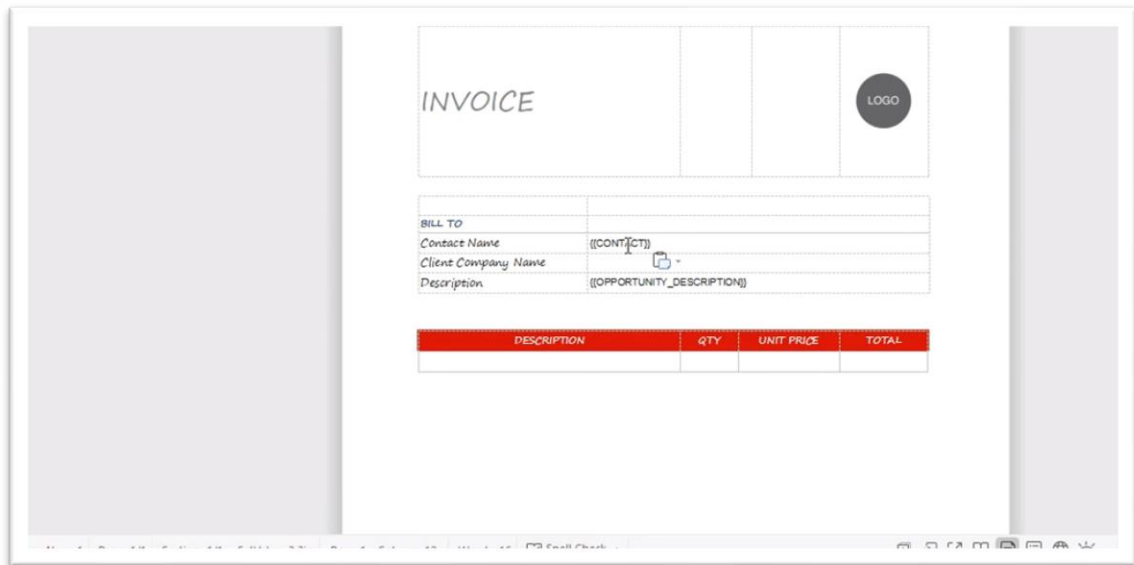
1 row

pLineItems

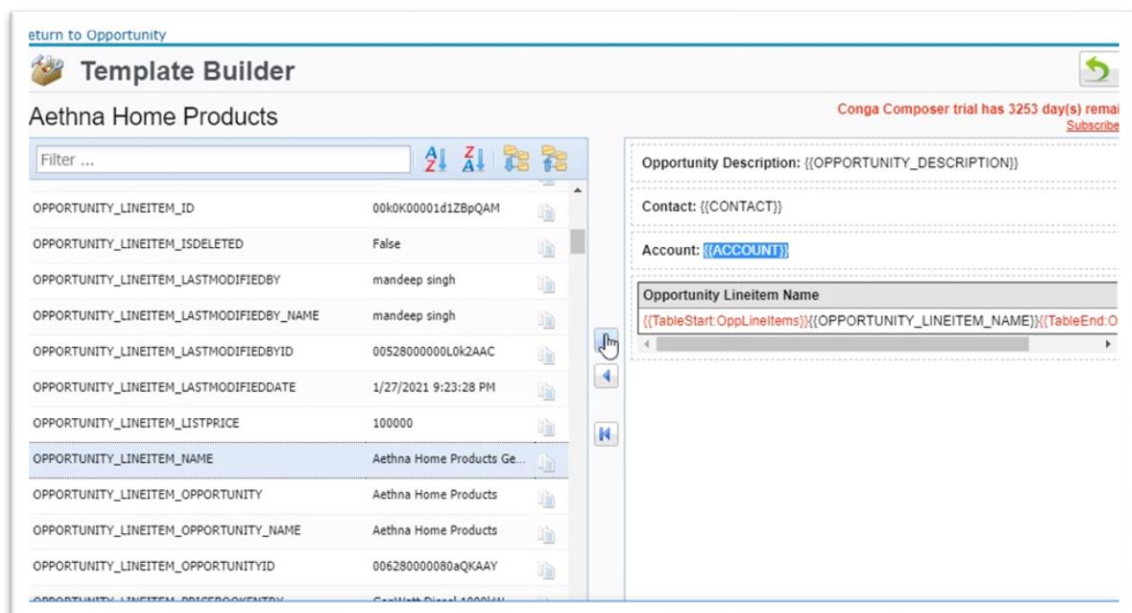
4 rows

Back

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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:

INVOICE

LOGO

BILL TO

Contact Name: {{CONTACT_FULLNAME}}

Client Company Name: {{ACCOUNT_NAME}}

Description: {{OPPORTUNITY_QUOTE_DETAILS}}

DESCRIPTION	QTY	UNIT PRICE	TOTAL
{{TableStart:OpportunityLineItemName}}	{{OPPORTUNITY_LINEITEM_QUANTITY}}	{{OPPORTUNITY_LINEITEM_SALES PRICE}}	{{OPPORTUNITY_TOTAL PRICE}}

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.

Conga Composer

Home Conga Quick Start Conga Composer Setup About Conga Composer Conga Solutions Conga Templates Conga Email Templates More

Related Contact

Name: Akin, Kristen

Output Options

File Type: Same as Template PDF File

Action: Download

Save a Copy [Enable]

Save To: Notes & Attachments

Activity Logging [Enable]

Subject:

Save Text: --None--

Follow-Up:

Update Fields [Enable]

Merge & Download

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: HENRIKAS
Client Company Name: Aethra Home Products
Description: Congo Composer Set up

DESCRIPTION	QTY	UNIT PRICE	TOTAL
Aethra Home Products Gen/Yatt Diesel 1000kWh	10	100000	1000000
Aethra Home Products Gen/Yatt Propane 1500kWh	34	120000	4080000
Aethra Home Products Installation Industrial - High	41	85000	3485000
Aethra Home Products SLA - Bronze	45	10000	450000