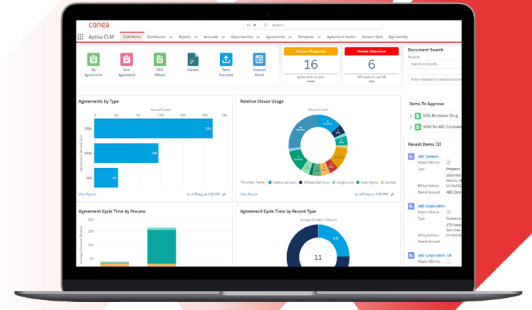




Conga Composer

Best practices for success



1 Test, test, and test again
Spot check your solution/template along the way. Local template testing and the preview button are great places to test.

2 Template groups
The name entered in the 'Template Group' field must match each template in the group.

3 Solution Manager
When you update a button, a record of the previous button is added to the button/formula archive. This retains a history of all button URLs changed in Solution Manager.

4 Query creation
Gather data and use the Conga Query Builder, or copy our sample queries and use them for your solutions.

[Conga Query Builder](#)

5 Parameter spaces
Spaces are not permitted in URLs, including parameter/value pairs. If the value requires spaces, replace each space with a plus sign (+).

6 Parameter names
Parameter names are not case-sensitive, but values may be; it's important to observe the case closely.

[Parameter guide](#)


7 Report naming
Adopt a naming convention that reflects:

- Master object for the Conga Composer solution the report is intended to support
- Name of the button or link to which the report belongs (Account Plan, Custom Invoice, etc.)
- Report alias—description of data being retrieved
- Salesforce report type—save space in the report name by listing it in the report's description field


8 Conga Keys
Migrate Composer solutions between Salesforce orgs by leveraging the Key field. This allows administrators to reference Conga Templates, Conga Email Templates, and Conga Queries by an external ID that remains the same throughout different Salesforce orgs.

[Conga Keys overview](#)

Enhancements through automation

 **Conga Batch**
Optional functionality that helps you choose what documents to send, how to send them, and when.

[Batch and Trigger overview](#)

 **Conga Trigger**
Optional functionality that automates the creation and distribution of documents without needing interaction.

Helpful tip

Salesforce knowledge
We recommend familiarizing yourself with basic terms, definitions, and overall principles of the database. And if desired, become a Salesforce Admin.