



Conga Orchestrate



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Conga Orchestrate lets you easily configure, automate, and manage large numbers of workflow steps without any coding or custom development from your Salesforce environment.

Orchestrate Release Notes


Review the latest features delivered in Conga Orchestrate.

- [Winter20.02.05 Release Notes](#)
- [Winter20.01.21 Release Notes](#)
- [Winter20.01.06 Release Notes](#)
- [Winter20.12.10 Release Notes](#)
- [Winter20.12.03 Release Notes](#)
- [Winter20.11.12 Release Notes](#)
- [Winter20.11.11 Release Notes](#)
- [Winter '20 Release Notes](#)

Winter20.02.05 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter20.02.05 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>(Version Name / Version Number)</i>
Conga Orchestrate (New)	14.127

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Orchestrate.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

New Features

There were no new features in this release. Keep checking the documentation portal for new updates.

Enhancements

There were no enhancements in this release.

Resolved Issues

The following table lists the issues resolved in this release.

Conga Internal ID	Description
PROC-1414	If a Step Custom Criteria Filter was modified outside of the Conga Orchestrate user interface, invalid processing occurred. For example, if there were only two Step Creation Conditions but the Custom Criteria Filter referenced three Step Creation Conditions, an infinite loop occurred during processing. This issue is now resolved.
PROC-1467	Conga Orchestrate displayed incorrectly on the Process Visual screen if you set Step Type as <i>Automation</i> .
PROC-1639	<i>Canceled</i> was available as a Rejected Status . It is now removed from the UI.
PROC-1744	View All and Modify All permissions were available for Step Reevaluation Criteria object in the standard user permission set. View All and Modify All permissions are now removed.
PROC-1745	Step creation criteria always defaulted to false if no child records were found for drill-down criteria. This issue was observed if you had <i>Does Not Contains</i> operator or a <i>Count of 0</i> operator in your criteria.
PROC-1746	Conga Orchestrate reported incorrect usage statistics for 90 and 365 day periods.
PROC-1747	The QuoteLineItem object chosen as a step object did not load the capture object info section on the step edit page. This issue was observed if it was the default step object in the object type to create picklist. Also, administrators no longer need to mark objects as searchable and more standard Salesforce objects are now selectable as step/process objects.

Known Issues


There were no known issues in this release.

DOC ID: ORCHWIN200205RN

Winter20.01.21 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter20.01.21 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>(Version Name / Version Number)</i>
Conga Orchestrate (New)	14.125

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Orchestrate.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

New Features

There were no new features in this release. Keep checking the documentation portal for new updates.

Enhancements

There were no enhancements in this release.

Resolved Issues

The following table lists the issues resolved in this release.

Conga Internal ID	Description
PROC-1410	Conga Orchestrate gave an <code>Attempt to de-reference a null object</code> error when working with clause bundles.
PROC-1737	For approval loopbacks, you could incorrectly loop from the top step.
PROC-1740	The Queued Steps batch job did not handle different types of process objects on the processed queued steps. This resulted in a query exception by querying the incorrect process object.
PROC-1741	When Event Placeholder steps were executed, their child steps with no drill-up or drill-down criteria did not create a step if there was another step with drill-up criteria on the definition.
PROC-1742	<p>The caching methods used to drill-down criteria processing time did not use a unique key for each criteria. This caused false positives or false negatives on step criteria.</p> <p>For example, a step may use the criteria of an executed step to say that the step was passed. This issue is now resolved.</p>

Known Issues

There were no known issues in this release.


DOC ID: ORCHWIN200122

Winter20.01.06 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter20.01.06 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product

- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>(Version Name / Version Number)</i>
Conga Orchestrate (New)	14.121

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Orchestrate.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

New Features

There were no new features in this release. Keep checking the documentation portal for new updates.

Enhancements

There were no enhancements in this release.

Resolved Issues

The following table lists the issues resolved in this release.

Conga Internal ID	Description
PROC-1669	The process instance of the deleted clause bundle did not get deleted. This issue was observed if the clause bundles did not match the criteria and were deleted, and the task was not configured.
PROC-1718	An admin user query in Conga Orchestrate returned up to 50000 rows. For an org with a large number of admins, it hit query limits and caused a crash. The query is now limited to 1000 rows.

Conga Internal ID	Description
PROC-1720	Conga Orchestrate did not truncate Process Instance names at the maximum allowed 80 characters on Case Process objects.
PROC-1722	If the final step was set as Skipped Stage Step, Process did not get completed.
PROC-1723	Conga Orchestrate assigned the child steps to incorrect Process Team Roles.
PROC-1726	Conga Orchestrate contained hard references to text fields in <i>where clauses</i> for account and contact queries. This prevented the queries from being encrypted.
PROC-1731	Custom contact field was not added to the account query in the initiator.

Known Issues

There were no known issues in this release.

DOC ID: ORCHWIN20200108

Winter20.12.10 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter20.12.10 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version (<i>Version Name / Version Number</i>)
Conga Orchestrate (New)	14.114

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Composer.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

New Features

There were no new features in this release.

Enhancements

There were no enhancements in this release.

Resolved Issues

Conga Internal ID	Description
PROC-1715	If you query child records that have drilled-down criteria, Conga Orchestrate added duplicate fields.
PROC-1717	Definition Initiators did not handle errors if a process objects' owner ID was not editable.

Known Issues

There were no known issues in this release.

Doc ID: ORCHWIN20201211RN

Winter20.12.03 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter20.12.03 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features

- **Resolved Issues:** Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- **Known Issues:** Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>(Version Name / Version Number)</i>
Conga Orchestrate	14.112

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Composer.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer

System Requirement	Minimum Supported Version
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

Upgrade Notes

Not all Salesforce orgs received Conga Orchestrate version 14 in the June 2020 release, as Conga Orchestrate continued testing to ensure a stable package for this major release.

For the Winter 2020 Release, Conga Orchestrate is pushing version 14 to all orgs on from November 2, 2020 - November 6, 2020.

New Features

There were no new features in this release.

Enhancements

There were no enhancements in this release.

Resolved Issues

Conga Internal ID	Description
PROC-1698	Implemented a fix for an issue where inserting and updating a contract in the same context resulted in one of the clauses not creating even if the criteria matched.

Conga Internal ID	Description
PROC-1697	The Visualforce page RTSelectCase now retains Record Type values and the Categories field populates as expected. RTSelectBP now retains Record Type on objects as expected.
PROC-1699	When a definition has Object_Record_Type__c filled in and no criteria, it now counts as one criteria.
PROC-1701	The process no longer crashes if a loop object doesn't have a process object lookup field.
PROC-1702	External Id fields on Managed Clause and Clause Bundle steps are now evaluated correctly in all situations.

Known Issues

There were no known issues in this release.

Winter20.11.12 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter '20 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version (<i>Version Name / Version Number</i>)
Conga Orchestrate	14.110

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Composer.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

Upgrade Notes

Not all Salesforce orgs received Conga Orchestrate version 14 in the June 2020 release, as Conga Orchestrate continued testing to ensure a stable package for this major release.

For the Winter 2020 Release, Conga Orchestrate is pushing version 14 to all orgs on from November 2, 2020 - November 6, 2020.

New Features

There were no new features in this release.

Enhancements

There were no enhancements in this release.

Resolved Issues

Conga Internal ID	Description
PROC-1667	Resolved an issue where Field Updates were not completing on loop back when a process object was set up with just process instance field.
PROC-1692	Resolved an issue with PostInstall that resulted in permissions errors.
PROC-1693	Order and Quotes objects no longer require the pce_definition_lookup__c field.
PROC-1694	Step Field Validations now re-render the validation message.
PROC-1695	Resolved an issue that caused Leads Order By errors.

Known Issues

There were no known issues in this release.

Winter20.11.11 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter '20 Release.

- **Packages:** Lists packages that are required to upgrade to this release of the product
- **System Requirements and Supported Platforms:** Lists requirements and recommendations for installing this release
- **New Features:** Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- **Enhancements:** Provides high-level descriptions of enhancements to existing features
- **Resolved Issues:** Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>(Version Name Version Number)</i>
Conga Orchestrate	14.109

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Composer.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

Upgrade Notes

Not all Salesforce orgs received Conga Orchestrate version 14 in the June 2020 release, as Conga Orchestrate continued testing to ensure a stable package for this major release.

For the Winter 2020 Release, Conga Orchestrate is pushing version 14 to all orgs on from November 2, 2020 - November 6, 2020.

New Features

There were no new features in this release.

Enhancements

There were no enhancements in this release.

Resolved Issues

Conga Internal ID	Description
PROC-1673	Resolved an issue where CLOCC objects were not allowed into the Generated Processes section of RBP page and queries were not accounting for objects with just a process instance field in the RBP controller.
PROC-1690	The Process Instance Name field now respects the limit of 80 characters.
PROC-1691	Resolved an issue where definitions from Version 13 had 'business_process_c' in the object name instead of 'fstr__business_process_c'.

Known Issues

There were no known issues in this release.

Winter '20 Release Notes

These Release Notes contain the following information about Conga Orchestrate Winter '20 Release.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version (<i>Version Name / Version Number</i>)
Conga Orchestrate	14.103

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga Composer.

System Requirement	Minimum Supported Version
Salesforce Edition	<ul style="list-style-type: none"> • Performance / Unlimited • Enterprise • Force.com • Developer
Browser	<ul style="list-style-type: none"> • Internet Browsers (latest stable version of): <ul style="list-style-type: none"> • Firefox® • Chrome® • Internet Explorer® (version 11 or the latest version supported by Salesforce) • Safari® (Mac only) • Microsoft Edge

Upgrade Notes

Not all Salesforce orgs received Conga Orchestrate version 14 in the June 2020 release, as Conga Orchestrate continued testing to ensure a stable package for this major release.

For the Winter 2020 Release, Conga Orchestrate is pushing version 14 to all orgs on from November 2, 2020 - November 6, 2020.

New Features

The following features are new to Conga Orchestrate in this release.

- Robotic Process Automation with UiPath
 - Customers of both Orchestrate and UiPath may now integrate UiPath bots and queues into an Orchestrate process definition.
 - The new Automation Step Type appears automatically when UiPath information is configured.
 - Sign up for a free UiPath trial [here](#).
 - For more information about UiPath integration and Automation Steps see, [Configuring UiPath for Conga Orchestrate](#) and [Creating a Step for Process Automation](#).
- Create Definitions from LucidChart Diagrams
 - The Definition list view user interface features a new Create from LucidChart button that provides users the ability to import and automatically translate LucidChart diagrams into a Process Definition.
 - After importing the LucidChart data, users can run the Process Definition with Conga Orchestrate.
 - For more information, see [LucidChart Integration with Conga Orchestrate](#).
- Support for Queues
 - Tasks are now available in Queues.
 - Approvals Steps are now assignable in Queues. This provides users the flexibility to pick up the Approvals from a Queue later on.
 - For more information, see [Assignee Types for Process Steps](#).
- Document Generation with Composer
 - Composer Advanced Features is enabled and available for existing Conga Orchestrate users that upgrade Previously, Composer Advanced Features was not initially enabled and available for customers that upgraded.
 - For more information, see [Creating a Step that Generates a Document](#) and [Using the New Composer Endpoint URL in Generate Document Steps](#).
- A new *Disable Trigger* field is added to Conga Orchestrate Setup that allows users to easily disable custom object triggers from the setup menu.
- Error alerting for Orchestrate platform events is now available. This informs the Conga Orchestrate Development team of issues as they occur in the application.

- Clause is now an available Step Type in Conga Orchestrate Definitions. This Step Type allows Conga Orchestrate users to dynamically add Managed Clauses to Process Object records in Salesforce.
 - The Clause Step Type supports one or multiple Clause Configuration records.
 - For more information, see [Creating a Step That Adds a Managed Clause](#) and [Automatically Create a Document after Adding Managed Clauses with Conga Orchestrate](#).
 - When exporting a Conga Orchestrate Definition from a Salesforce org, the exported file is subsequently given the same name as the corresponding Definition record. Previously, exported Definition files had a generic name that was not related to the specific Definition.

Enhancements

- Checklists: One of the most utilized features is now enhanced and available on more than just Step records.
 - The Checklist component is now available on Process objects. Previously checklists were only available on task or custom object Steps.
 - Columns in the Checklist Component are now sortable and a new column is added that displays the Status, Completed By, and Date fields. The new column is viewable in both a table view and non-table view.
 - The Create with Status field is now available for use on Checklist Steps. The Create with Status field was previously unavailable on that specific Step Type.
 - For example, once a user checks off items in the Checklist Component, Orchestrate automatically sets the status to *In Progress* instead of *Not Started*. This saves users time by not having to update the field manually to *In Progress*.
 - For more information, see [Managing the Status of a Step with a Checklist](#).
- Definition Conditions
 - Record Type is no longer required for Definition Conditions and is now available as optional Definition Criteria to allow for users to use the same Orchestrate Processes on different object record types, if desired.
- The Deletable checkbox field on Steps now features helpful text that describes the field's functionality.
 - A Step is deleted automatically when Deletable is selected, Step Creation Conditions are used, the Reevaluate When option is selected, and the Creation Conditions for the Step no longer match.
- A Back button and Refresh button are now available on the Definition Visualization user interface. This allows users to easily leave the Definition View user interface, return to the started record, and refresh the page.

- If the Task object is set up as an available Step Object, Tasks are automatically created when a Clause Bundle Step completes a Stage. This allows users to easily track the status of the process.
- The Conga Orchestrate Administrative User and Standard User Permission Sets now include necessary Apex Classes to run Conga Orchestrate. This creates an easier and more seamless process when assigning the appropriate permissions to Salesforce users.

Resolved Issues

- Users no longer incur an error message when inserting or updating certain objects in an org that has the Financial Services Cloud package installed.
- All permission sets are properly setup and configured after upgrading the Conga Orchestrate package from a previous package older than Conga Orchestrate 14.20. Previously, an issue occurred while assigning one of the Orchestrate permission sets.

Known Issues

- There are no known issues in this release.

About Conga Orchestrate

Conga Orchestrate™ allows you to define and execute real-world processes end-to-end in a Salesforce environment. You can define processes on a Campaign, Case, Contract, Lead, Opportunity, Business Process (a custom object added by Conga Orchestrate) as well as any custom object. When you create or edit records in Salesforce, Conga Orchestrate monitors these actions and executes processes when your Definitions match the record.

Conga Orchestrate allows an administrator to perform the following administrative tasks:

- Install Conga Orchestrate
- Set Security Permissions
- Configure and Setup Orchestrate
- Create and Edit Page Layouts
 - Edit Account Page Layouts For Roles
 - Edit Account Page Layouts for Business Processes
 - Edit Contact Page Layouts for Business Processes
 - Add Process Details and Process Visual Buttons to Page Layouts
- Configure Custom Objects
- Configure Non-Working Days
- Configure Out of Office Link in Classic
- Create Reports and Gantt Chart
- Integrate with Twilio
- Integrate with SendGrid

Conga Orchestrate allows a user to perform the following tasks:

- Create Process Definitions
- Create Steps
 - Creating a Step that Creates a Record
 - Creating a Step that Generates a Document
 - Create a Step that Posts to Chatter
 - Creating a Step that Sends an Email
 - Creating a Step to Update Records
 - Creating a Step with an Event Placeholder
 - Creating a Step with an API Callout
 - Creating a Step with Robotic Process Automation
 - Creating a Step that Adds Managed Clause Bundles
 - Creating a Step that Adds a Managed Clause
- Managing the Status of a Step
- Initiate a Process
 - Automatically Initiate a Process

- Manually Initiate a Process
- Export Definitions
 - Export Multiple Definitions
- Import Definitions
- View your Conga Orchestrate Usage

Key Terminology

It is important to understand how terms are used when working with Conga Orchestrate.

Term	Description
Definition	The definition is a container that holds process steps. It is a template for a process and it contains one or more steps.
Steps	Definitions contain multiple steps. At each step, a record is created, email sent, field updated, the document generated, or API callout sent.

What's New in Orchestrate

Documentation

The following section lists changes in the documentation to support each release.

Spring '21

Document	Topic	Description
Spring '21 Rev A	Advanced Functionality with Step Creation Conditions	Updated topic. Added information on Troubleshooting Step Creation Conditions.
	Managing the Status of a Step with a Checklist	Updated topic. Added information on added checklist component on the community page.
Spring '21	Advanced Functionality with Step Creation Conditions	Updated topic. Added note about Optimizing drill-down criteria.
	Creating a Step that Generates a Document	Updated the topic to add a missing parameter.
	Orchestrate REST APIs	New APIs introduced in this release.

Orchestrate for Administrators

This section describes how to install and set up Conga Orchestrate.

Topic	Description
What's Covered	This section is designed to provide administrators with information on installing and setting up processes within Conga Orchestrate. This section covers the most common use cases for administration and assumes a level of familiarity with basic Salesforce.
Primary Audience	Admin users responsible for setting up Conga Orchestrate.
IT Environment	For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix .
Updates	For a comprehensive list of updates for each release, see What's New in Orchestration Documentation .
Other Resources	See Orchestrate for Users for information on Orchestrate workflow and use cases.

This section describes the following tasks:

- Installing Orchestrate
- Setting up and Configuring Orchestrate
- Security Configurations

Before using Orchestrate, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Conga terms and definitions

Select one of the following topics for more information:

- [Conga Orchestrate Technical Requirements](#)
- [Installation and Setup](#)
 - [Basic Setup](#)
 - [Advanced Setup](#)
 - [FAQs Tips and Known Issues](#)

Conga Orchestrate Technical Requirements

To install and successfully use Conga Orchestrate®, you must have one of the following from each category:

Salesforce® Edition:

- Performance / Unlimited
- Enterprise
- [Force.com](#)
- Developer

Internet Browsers (latest stable version of):

- Firefox®
- Chrome®
- Internet Explorer® (version 11 or the latest version supported by Salesforce)
- Safari® (Mac only)
- Microsoft Edge

Installation and Setup

Select one of the following for more information.

- [Basic Setup](#)
 - [Installing Conga Orchestrate](#)
 - [Upgrading to Conga Orchestrate Version 14](#)
 - [Security Using Permission Sets](#)
 - [Security Profile Configuration](#)
 - [End User Profile Security Configuration](#)
 - [Administrator Profile Security Configuration](#)
 - [Conga Orchestrate Essential Configuration](#)
 - [Conga Orchestrate Setup and Configuration](#)
 - [Manual Setup](#)
 - [Page Layouts](#)
 - [Editing Account Page Layouts For Roles](#)
 - [Editing Account Page Layouts for Business Processes](#)
 - [Editing Contact Page Layouts for Business Processes](#)
 - [Adding Process Details and Process Visual Buttons to Page Layouts](#)
 - [Adding a Sub Type to the Event Page Layout](#)

- [Overriding the Task and Event View Page with the Conga Orchestrate Visualforce Page](#)
- [Creating Event Sub-Types](#)
- [Default Team Members](#)
- [Connected App Configuration](#)
- [Creating a Master Page Layout](#)
- [Activating the Conga Composer Remote Site for Generate Document Steps](#)
- [Deleting the PCE - Settings Tab After Upgrading Conga Orchestrate](#)
- [Financial Services Cloud Setup](#)
- [Renaming the Conga Orchestrate Salesforce App](#)
- [Updating Conga Orchestrate's App Logo](#)
- [Upgrading Conga Orchestrate from the AppExchange](#)
- [Using Process Definition Quick Starts](#)
- [Advanced Setup](#)
 - [Conga Orchestrate Scaling Enhancements](#)
 - [Using Custom Objects as Process Objects, Steps, and Monitored Objects](#)
 - [Using a Custom Object as a Process Object](#)
 - [Using a Custom Object as a Step](#)
 - [Using a Custom Object as a Process Object and Step](#)
 - [Disabling a Custom Object Trigger](#)
 - [Using a Custom Object as an Initiator's Monitored Object](#)
 - [Custom Process Details Button and Process Visual Button for Custom Objects as Process Objects](#)
 - [Configuring Non-Working Days \(Optional\)](#)
 - [Configuring Business Hours \(Optional\)](#)
 - [Configuring Out of Office Link in Classic](#)
 - [Configuring a Gantt Chart \(Optional\)](#)
 - [Creating Process Groups for Reporting and Gantt Charts \(Optional\)](#)
 - [Notifying on Assignment \(Optional\)](#)
 - [Configuring Virtual Steps \(Optional\)](#)
 - [Customizing the Process Object Lookup Field \(Tasks\)](#)
 - [Configuring the SendGrid Integration](#)
 - [Configuring the Twilio Integration](#)
 - [Configuring UiPath Integration for Conga Orchestrate](#)
 - [Implications of Enabling Shared Contacts](#)
 - [Creating an Apex Test Class for a Custom Object as a Process Object](#)
 - [Creating an Apex Test Class for a Custom Object as a Process Object and a Step](#)
 - [Creating an Apex Test Class for a Custom Object as a Step](#)

- [Creating an Apex Trigger for a Custom Object as a Process Object](#)
- [Creating an Apex Trigger for a Custom Object as a Process Object and a Step](#)
- [Creating an Apex Trigger for a Custom Object as a Step](#)
- [Modifying Custom Triggers to Use Objects as Process Objects, Step Objects, or Both](#)
- [Custom Object Wizard](#)
- [Fields for Custom Objects as Process Objects](#)
- [Fields for Custom Objects as Process Objects and Steps](#)
- [Fields for Custom Objects as Steps](#)
- [Lucidchart Integration with Conga Orchestrate](#)
- [Setting Up a Report for Conga Orchestrate](#)
- [Use a Lightning Component to Manage Approvals for a Process Object](#)
- [Conga Orchestrate Scaling Enhancement](#)

Basic Setup

In order to fully integrate Conga Orchestrate with your Salesforce organization, some initial setup is required. The instructions that follow take you through installing Conga Orchestrate, changing security profiles, editing layouts, adding a Picklist value, as well as overriding the Task and Event pages with the custom pages included with Conga Orchestrate. Once these steps are complete, you will be ready to automate your business processes.

1. [Install Conga Orchestrate](#)
2. [Guided Setup and Configuration](#)
3. [Security Configuration](#)
4. [Essential Configuration](#)

Installing Conga Orchestrate

You must first have an account with [Salesforce](#) before installing Conga Orchestrate.


To install Conga Orchestrate:

1. Install from AppExchange.
 - a. Navigate to the [AppExchange listing](#) and click Get It Now
2. Log in to your Salesforce account.
3. Select **Install for Admins**.
4. Select **Install**.

5. Select the Yes, access to these third-party web sites checkbox to use this web service to manage access to Conga Orchestrate features. Conga can enable features based on the license level you purchase. Conga can enable features based on the license level you purchase. Additionally, this web service reports user counts to Conga for license auditing.
6. Select **Continue**.
7. Select **Done** to return to Setup. You will receive an email after the installation is complete.

Connected App Configuration

1. In Setup, use the Quick Find and type Connected Apps.
2. Select Connected Apps.
3. Select OrchestrateSetup.
4. Select the Edit Policies button.
5. In the Permitted Users dropdown, select Admin approved users are pre-authorized.
6. Select OK to accept the security warning. You will satisfy the requirements in the following steps.
7. Select Save.
8. Scroll down the page and select Manage Profiles or Manage Permission Sets (which one you choose is determined by how you want to manage access to Conga Orchestrate).
9. Choose the Profile(s) or Permission Set(s) that should have access to Conga Orchestrate. If using Permission Set(s), you can only add custom (non-managed) Permission Set(s).
10. Click Save.

 Only add the IP addresses below if your organization is currently restricting IP ranges. Adding these IP addresses without having other ranges currently whitelisted may lock users out of Salesforce. If you have your own security software, you must whitelist these IP addresses in the security software itself.

If you are using trusted IP ranges, enter the static IP addresses below in Salesforce Setup.

Navigate to Setup → Security Controls → Network Access → and also enter the IP addresses in → Setup → Manage Users → Profiles → click the specific Profile Name → Login IP Ranges.

Start IP Address	End IP Address
104.214.119.36	104.214.119.36

Start IP Address	End IP Address
13.85.76.19	13.85.76.19
13.85.76.166	13.85.76.166
13.85.75.231	13.85.75.231
13.84.158.191	13.84.158.191

Upgrading to Conga Orchestrate Version 14

Introduction

Conga Orchestrate version 14 includes new features and enhancements to help improve your current processes. Take advantage of the new features described below.

Conga Orchestrate changes revolved around a new object: **Process Instance**

Important

- If you have Steps assigned to Queues, also add the Process Instance to the same Queues as the Step's Object Type to Create.
- Important: Upgrading from Conga Orchestrate version 13 to Conga Orchestrate version 14 requires you to first [install Conga Orchestrate version 14.18.2](#). This installation is only required if you are currently on version 13 and are manually upgrading your org to version 14.

- ✓ If your custom code references Orchestrate fields, we recommend setting the version of Orchestrate code referenced in the Apex class(es) to version 13, not version 14

All fields formerly included on objects like Opportunity, Contract, Task, Case, Lead, and Campaign are now removed to allow for a light-weight install of Conga Orchestrate and for you to set up only the objects you want to use it with.

New Features and Functionality

- Certain default fields shipped with previous Conga Orchestrate packages are now removed.

- Fields are removed from the Case, Campaign, Contract, Lead, Opportunity, and Activity objects.

Important

- Upgrading from version 13 to version 14 causes fields previously shipped on the Contract, Lead, Opportunity, Campaign, Case, and Activity objects to become deprecated. This can result in issues if the deprecated fields are referenced in custom code or within fieldsets in an org.
- Track automated process Steps (such as emails, record updates, and document generation) without being required to use tasks.
 - Use the Process Instance related list for Step track.
- Tasks are now available in Queues.
 - If it exists in your org, deactivate the existing "task_cant_be_queue" Validation Rule on the Step object: Setup → Object Manager → Step → Validation Rules → task_cant_be_queue
- Assign Queues to Approval and Checklist Steps
 - Easily assign Approval and Checklist Steps to Queues after adding the Step Object, Approval Object, or Checklist Object to the Queue's available objects.
 - This Queue will show up as Assignee Type on the Step and your Queue will be on the list.
- Create Definitions from Lucidchart.
 - Add the Create From Lucidchart button on the Definition List View.
 - Object Manager → Definition → Search Layouts (for Salesforce Classic) → List View → Edit.
 - Add Create From Lucidchart to the list of Selected Buttons.

New Installation


On a brand new installation, the only objects available to use "out of the box" are the **Business Process** and **Process Task objects**. Both objects are shipped by default with Conga Orchestrate. These objects both have all of the old fields that were previously required, as well as a lookup field to the new Process Instance object.

To set up a custom object or standard object (such as Opportunity, Contract, or Task) as a Step or Process Object, navigate to the **Conga Orchestrate Setup** page and then use the **Configure Object** link in the Advanced Setup section.

When adding a new object as a Step, Process Object, or both, only a Process Instance lookup field and a Status field are created on the object. If the object is a Step Object or both, you must also create a lookup field to the Process Object(s) that the Step is used for.

If you are using an existing field, you are given the option to map certain fields to fields that were formerly required and are subsequently filled out during execution. This looks similar to the image below.


These are the field mappings for selecting an existing object as a Process Object. If you map any of these fields, they are filled out during execution like objects previously were. The only fields that are actually created are the Process Instance lookup field and the Status field.

 The Status field does not get created if you map an existing picklist field in its place on this screen.

After this screen, the rest of the setup process is the same as it was in Conga Orchestrate Version 13.

Upgrading From Conga Orchestrate Version 13

When upgrading from Version 13 to Version 14, the objects previously mentioned (Contract, Opportunity, Lead, Case, Campaign, and Task) continue to have the fields that were added to each with the Version 13 installation. You do not need to modify any existing Process and Step Objects. After an upgrade, all processes run as normal and all old fields are still populated as they were in Version 13.

 You can also manually add a lookup field to the Process Instance object, with the API name `Process_Instance__c`, to the Process or Step object if you do not want to go through the setup process.

Important

You must add the Process Instance lookup field on an object before deleting the previously required fields from Conga Orchestrate Version 13.

To upgrade an object and use it in Version 14, simply run it through the setup process again. This adds a Process Instance lookup field. You are now free to delete every field Orchestrate added to the object with Version 13 (aside from many Status fields), or you can keep all fields and the Process Instance lookup field. During execution, a process instance is made with all process data that Orchestrate needs, but those old fields also get populated as they were in Version 13 if they exist or are properly mapped.

Assign administrators and users to the new Conga Orchestrate Admin and User permission sets. During post-install, this should be done automatically for users who were assigned to the prior permission sets.

Notes:

1. If you manually add the Process_Instance__c lookup field to an object that was configured with the old fields in Version 13, double-check that the trigger running it contains nothing but the following code snippet:
`FSTR.COTriggerHandler.handleProcessObjectTrigger();`
If the Conga Orchestrate trigger code was inserted into an existing trigger with other custom code created by a client, ensure that the Conga Orchestrate snippet changes to the code above (if it is not already).
2. A Process Instance record is only created and attached to a Process or Step Object if that object has a process instance lookup field with the API name Process_Instance__c. Conga Orchestrate does not allow that to be mapped to a field with another name. It is required to use that specific API name, but the field label does not matter.
3. The process instance houses all of the information that was previously stored on the Step or Process Object to give Conga Orchestrate the information it needs to execute definitions. This reduces the product's footprint on objects, reducing the previously required 14 (or more) fields to only 2 required fields and the Process Object lookup fields. To view data that was previously stored on the object, such as a Definition that was executed, navigate to the Process Instance and check the Definition field.
4. There are no changes to Approval and Checklist objects in regards to the new Process Instance. These objects are outside the realm of Step or Process Objects and therefore function the same.

Security Using Permission Sets

Use Permission Sets to easily assign security settings for Conga Orchestrate users.

Conga Orchestrate comes with two Permission Sets you can use: New Conga Orchestrate Standard User and New Conga Orchestrate Administrative User.

The New Conga Orchestrate Standard User Permission Set is for your end-users (people kicking off or participating in processes) and the New Conga Orchestrate Administrative User Permission Set is for users creating processes as well as participating in them. During upgrades, Conga Orchestrate assigns these Permission Sets to users based on their

Salesforce Profile. When you add new users between releases, you manually assign the appropriate Permission Set to each user.

To assign Conga Orchestrate security using Permission Sets:

1. In Setup, use the Quick Find and type Permission Sets.
2. Select Permission Sets.
3. Select the New Conga Orchestrate Standard User permission set.
4. Select the Manage Assignments button.
5. Select the Add Assignments button.
6. Select the checkbox next to all users you desire to add to this permission set and select the Assign button.
7. Select Done.
8. Repeat these steps for the New Conga Orchestrate Administrative User permission set.

Security Profile Configuration

After you install Conga Orchestrate, you can either configure security via [Permission Sets](#), Profiles, or a combination of both. If you already followed the Permission Sets directions, it is up to you whether you desire to configure your profiles.

To configure Profiles follow the steps for [End User Security](#) access and [Administrator Security](#). An End User executes or participates in a process. An Administrator creates process definitions. Whether you chose to Grant Access to All Users or Grant Access to Administrators when installing Conga Orchestrate, configure your security profiles to match. Apply these changes to the appropriate custom profiles in your organization.

When you upgrade Conga Orchestrate, your security settings will not be overridden. Therefore, it is safe to choose Grant Access to All Users when upgrading Conga Orchestrate.

End User Profile Security Configuration

Note

Conga Orchestrate is not compatible with the Guest User profile in Salesforce Communities.

Steps to configure the end-user security profile.

1. In Setup, use the Quick Find and type Profiles.

2. Select the profile that applies to "End Users". You can enable and disable the Enhanced Profile Editor from Setup > Customize > User Interface > Check/Un-Check Enable Enhanced Profile User Interface. If you are unsure how to match up these settings with the Enhanced Editor, temporarily disable it while configuring Conga Orchestrate.
3. Select Edit. Make sure that your settings match the ones below.
 - Select the Conga Orchestrate Visible checkbox in the Custom App Settings section
 - Select Default On from the Custom Reports drop-down list box.
 - Select Default Off from the Default Teams drop-down list box.
 - Select Default On from the Definition Initiators drop-down list box.
 - Select Default On from the Definitions drop-down list box.
 - Select Default Off from the Process Team Members drop-down list box.
 - Select Tab Hidden from the Conga Orchestrate Setup drop-down list box.
 - Select Default Off from the Virtual Steps drop-down list box.
 - Select Default On from the Conga Orchestrate Help drop-down list box.
 - Select Default Off from the Process Groups drop-down list box.
 - Select Default On from the Process Tasks drop-down list box. If you are not utilizing Process Tasks, set this to Default Off.
 - Select Default Off from the Recurring Business Processes drop-down list box.
 - Select the Read, Create, Edit and Delete checkboxes for:
 - Business Processes.
 - Default Team Members.
 - Step Reassignments.
 - Team Members.
 - Virtual Steps.
 - Process Archive.
 - Process Groups.
 - Process Tasks.
 - Delayed Steps.
 - Recurring Business Processes.
 - Select the Read check boxes for:
 - Callout Error Queues.
 - Custom Reports.
 - Definitions.
 - Definition Criteria.
 - Definition Initiators.
 - Definition Initiators Criteria.
 - Process Team Members.

- Stages.
 - Steps.
 - Step Assignments.
 - Step Creation Conditions.
 - Step Field Updates.
4. Select Save.
 5. Navigate to the Selected Record Type section.
 6. Select Edit next to Business Processes and remove the Sample Process Record Type from the Selected Record Types list.
 7. Select Save.
 8. Navigate to the Enabled Visualforce Page Access section and select Edit.
 9. Enable Visualforce Page Access to all the pages that begin with "FSTR".
 10. Select Save.

Administrator Profile Security Configuration

1. In Setup, use the Quick Find and type Profiles.
2. Select the profile that applies to "System Administrators".
You can enable and disable the Enhanced Profile Editor from Setup > Customize > User Interface > Check/Un-Check Enable Enhanced Profile User Interface. If you are unsure how to match up these settings with the Enhanced Editor, temporarily disable it while configuring Conga Orchestrate.
3. Select Edit. Make sure that your settings match the ones below.
 - Select the Conga Orchestrate Visible checkbox.
 - Select Default On from the Custom Reports drop-down list box.
 - Select Default On from the Default Team drop-down list box.
 - Select Default On from the Definition Initiators drop-down list box.
 - Select Default On from the Definitions drop-down list box.
 - Select Default On from the Process Team Members drop-down list box.
 - Select Default Off from the Conga Orchestrate Setup drop-down list box.
 - Select Default On from the Virtual Steps drop-down list box.
 - Select Default On from the Conga Orchestrate Help drop-down list box.
 - Select Default On from the Process Groups drop-down list box.
 - Select Default On from the Process Tasks drop-down list box.
 - Select Default Off from the Recurring Business Processes drop-down list box.
 - Select the Read, Create, Edit and Delete, View All, and Modify All checkboxes for:
 - Business Processes.
 - Default Team Members.
 - Step Reassignments.

- Team Members.
 - Virtual Steps.
 - Process Archive.
 - Process Groups.
 - Process Tasks.
 - Delayed Steps.
 - Recurring Business Processes.
 - Test PCEs.
 - Test PCE Steps
 - Callout Error Queues.
 - Custom Reports.
 - Definitions.
 - Definition Criteria.
 - Definition Initiators.
 - Definition Initiators Criteria.
 - Process Team Members.
 - Stages.
 - Steps.
 - Step Assignments.
 - Step Creation Conditions.
 - Step Field Updates.
4. Select Save.
 5. Navigate to the Selected Record Type section.
 6. Select Edit next to Business Processes and remove the Sample Process Record Type from the Selected Record Types list.
 7. Select Save.
 8. Navigate to the Enabled Visualforce Page Access section and select Edit.
 9. Enable Visualforce Page Access to all the pages that begin with "FSTR".
 10. Select Save.

Conga Orchestrate Essential Configuration

In order to fully integrate Conga Orchestrate with your Salesforce organization, some initial setup is required. The instructions that follow take you through configuring various Conga Orchestrate components like adding Conga Orchestrate object-related lists to your customized Account and Contact page layouts.

To quickly add these components, utilize our automatic setup functionality, otherwise, follow the instructions laid out in the [manual setup](#) section of this documentation. Once the

essential configuration steps are complete, you will be ready to automate your business processes. For more information, see [Automatic Setup & Configuration](#).

Conga Orchestrate Setup and Configuration

When you initially install Conga Orchestrate, you will be prompted to use the Guided Setup on the Conga Orchestrate Setup tab.

1. In the Getting Started screen, read the information and use the wizard-like process to perform the initial configuration of the Conga Orchestrate.
2. In the User Permissions step, read the information, perform any required tasks.
3. Follow the onscreen prompts for the remaining steps: Connect with OAuth, Add Related Lists, Add Buttons, Add Sub Type, and Advanced.
 - To select a field, click in its unselected check box to select it. To select all the fields in a group, select the top checkbox.
 - Scroll down in each step to view all the configurable data.

Exercise care in making your selections since you cannot edit the information you provide after completing the wizard. Use the back button to return to a previous step in the wizard.

The Guided Setup will automatically display if you have not finished all of the initial configuration steps. After completion, it is available as a link in the left-side Settings list.
4. To find settings once you have already finished the Guided Setup, click the icon to display the App Launcher window.
5. In the Search field, begin typing Conga Orchestrate Setup and then click the link when it appears in the All Items list.
6. When the Conga Orchestrate Setup tab displays in your Settings screen, click it to display a list of links to other configurable system settings.
7. Click any of the Settings links on the left-hand side and configure the items:
 - Guided Setup - Returns you to the Getting Started Wizard so you can review your selections. However, you cannot edit any of the information you provided.
 - General Settings - Includes Related Lists, Buttons, and Event Sub Type.
 - Setup Information - Customize the information for Conga Orchestrate by reading the onscreen instructions and making a selection in the Select Option lists. Use the Enable Functionality checkboxes to enable and disable program functions.
 - The new Show Advanced Step Settings checkbox field located in Setup Information makes the Advanced Settings display on the Step Page. This is a global option, so once checked the Advanced Settings will appear on every step page where applicable.

Once the Show Advanced Step Settings checkbox is checked, Orchestrate users can access Advanced Settings on a Step.

- Chatter Options - Select your Chatter Team, the fields to include in your Chatter Posts, and the Roles you want available for Mention in your Chatter Posts.
- Permissions and Sharing - Contact Orchestrate Support before populating the custom sharing method.
- Document Merge - Configures the Signix integration setup for use with Mix.
- Email Alerts - Identifies token to enable [SendGrid](#) transactional email templates.
- SMS Notifications - Configures the integration with [Twilio](#).
- [Virtual Steps](#) - Schedules steps to show the relationship between the amount of work completed and the amount of work remaining.
- Custom Activity Lookup Field - Uses a custom Task Lookup field instead of Related To (WhatId) for process objects.
- Process Summary - Configures classifications for a [Step](#), including internal and external step labels. This configuration also selects the fields used in [Gantt charts](#).
- Feature Controls - Used to enable/disable several Conga Orchestrate functions, including the editing/deletion of closed steps.
- Custom Objects (Advanced option) - Creates and executes a complex process against a Conga Orchestrate object.
- Initiators (Advanced option).

8. Click Save.

Manual Setup

In order to fully integrate Conga Orchestrate with your Salesforce organization, some initial setup is required. The instructions that follow take you through editing layouts and adding a Picklist value, as well as overriding the Task and Event pages with the custom pages included with Conga Orchestrate. Once these steps are complete, you will be ready to automate your business processes.

For a more automated way to configure these items, see Conga Orchestrate Setup and Configuration.

1. [Page Layouts](#)
2. [Add Canceled to Task's Status Picklist](#)
3. [Override the Task & Event View Page](#)
4. [Create Event SubTypes](#)

Page Layouts

This section details Page Layouts including:

- [Editing Account Page Layouts for Roles](#)
- [Editing Account Page Layouts for Business Processes](#)
- [Editing Contact Page Layouts for Business Processes](#)
- [Adding Process Details & Process Visual Buttons to Page Layouts](#)
- [Adding a Sub Type to the Event Page Layout](#)
- [Master Page Layouts](#)
- [Overriding Task and Event View Pages with Visual Force Page](#)

Editing Account Page Layouts For Roles

In a Conga Orchestrate process, you can assign responsibilities at each Step to different team roles.

To view the team member(s) involved in a process for an Account, add the Team Member related list to applicable Account page layouts:

1. In Setup, use the Quick Find and type Accounts.
2. Select Page Layouts.
3. Select Edit next to the Page Layout in which you're adding the Team Member related list.
4. Select Related Lists.
5. Drag and drop the Team Member section onto the page layout.
6. Select the Related List Properties (wrench icon) on the Team Members related list.
7. Add Team Member and Team Role to the Selected Fields frame.
8. Click Ok.
9. Select the Save button in the Page Layout editor.

Editing Account Page Layouts for Business Processes

To view the Business Processes related to an Account:

1. In Setup, use the Quick Find and type Accounts.
2. Select Page Layouts.
3. Select Edit next to the Page Layout in which you're adding the Business Processes related list.
4. Select Related Lists.
5. Drag and drop the Business Processes (Account) section onto the page layout.

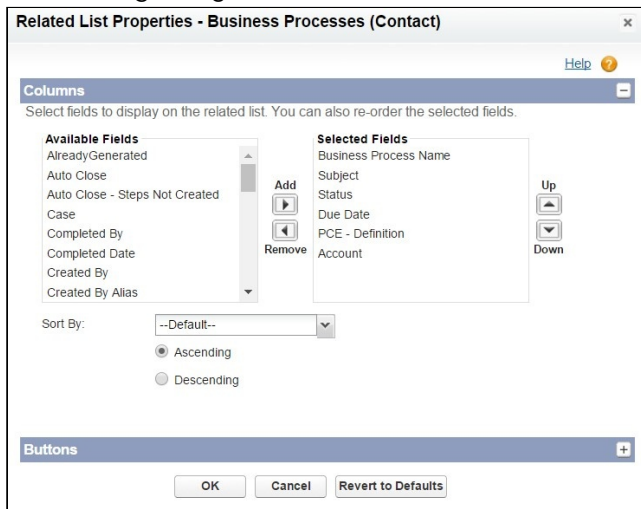
6. Select the Related List Properties (wrench icon) on the Business Processes related list.
7. Add the following fields to the Selected Fields frame.
 - Business Process Name.
 - Subject.
 - Definition.
 - Due Date.
 - Status.
 - Contact.
8. Select any other fields you desire to see in the related list and order the fields as needed.
9. Click Ok.
10. Repeat the steps above to add the Recurring Business Processes related list to any applicable Account page layouts. In the Related List Properties, add the following fields to the Selected Fields frame:
 - Recurring Business Process Name.
 - Recurrence Type.
 - Interval.
 - Interval Number.
 - Begin Date.
 - End Date.
 - Next Scheduled Occurrence.
11. Select the plus sign icon in the Buttons frame.
12. De-select the New checkbox and select the OK button.
13. Select the Save button in the Page Layout editor.

Editing Contact Page Layouts for Business Processes

To view the Business Processes related to a Contact:

1. In Setup, use the Quick Find and type Contacts.

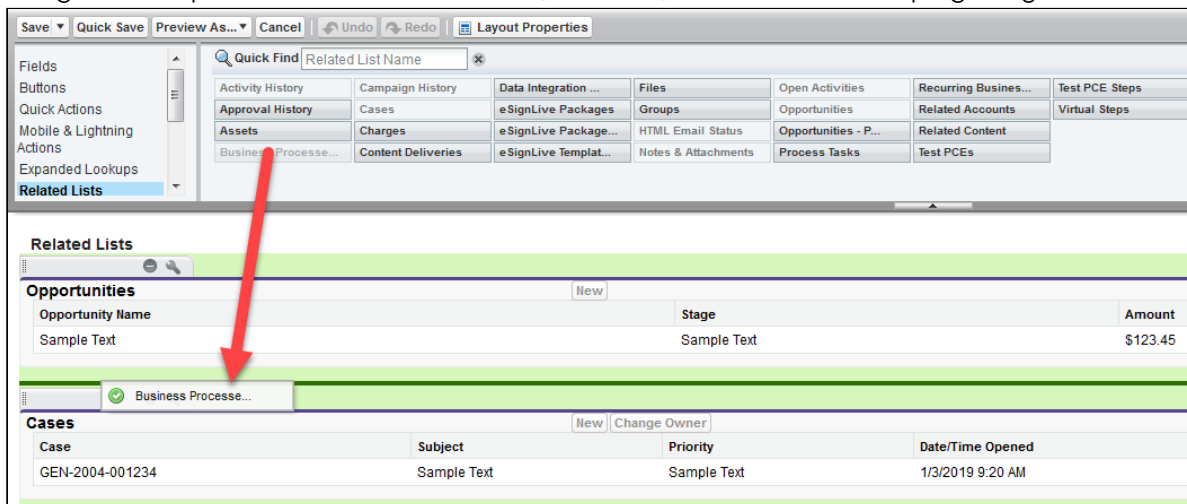
2. Select Page Layouts.



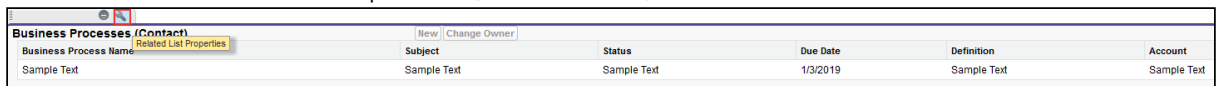
3. Select Edit next to the Page Layout in which you're adding the Business Processes related list.

4. Select Related Lists.

5. Drag and drop the Business Processes (Contact) section onto the page layout.



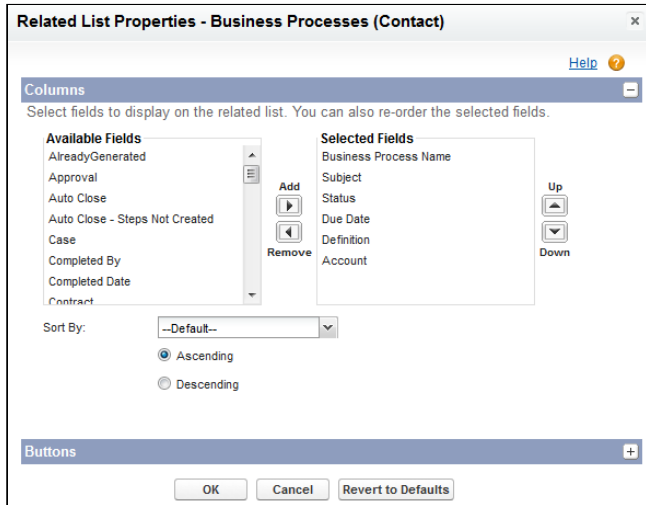
6. Select the Related List Properties (wrench icon) on the Business Processes related list.



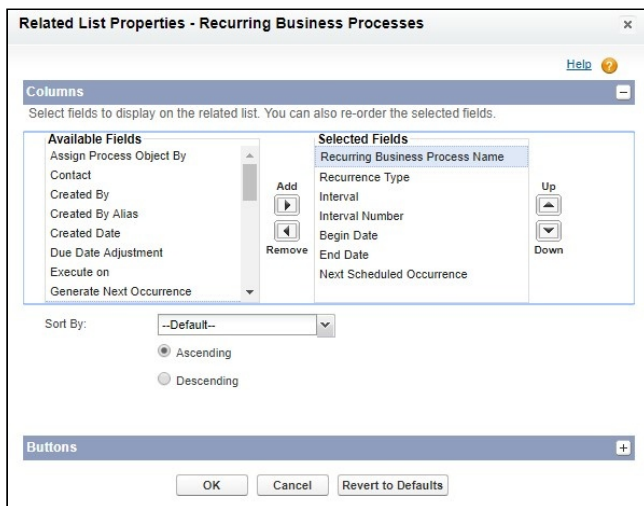
7. Add the following fields to the Selected Fields frame.

- Business Process Name.
- Subject.
- Definition.
- Due Date.
- Status.
- Account.

8. Select any other fields you desire to see in the related list and order the fields as needed.



9. Click Ok.
10. Repeat the steps above to add the Recurring Business Processes related list to any applicable Contact page layouts. In the Related List Properties, add the following fields to the Selected Fields frame:
 - Recurring Business Process Name.
 - Recurrence Type.
 - Interval.
 - Interval Number.
 - Begin Date.
 - End Date.
 - Next Scheduled Occurrence.



11. Click Ok.
12. Select the Save button in the Page Layout editor.

Adding Process Details and Process Visual Buttons to Page Layouts

You may optionally add a Process Details button and a Process Visual button to Page Layouts.

The Process Details button allows you to download Process Details into an Excel spreadsheet. The Process Visual displays the process in graphic form and is a visual representation of how the Steps execute. See [Visualization](#).

To add the Process Details custom button to Process Object Page Layout(s):

1. In Setup, navigate to the Page Layouts section of the Process Object (Cases, Campaigns, Opportunities, etc).
2. Select Edit next to the Page Layout in which you are adding the buttons.
3. Select the Buttons option in the left frame.
4. Drag and drop the Process Details and Process Visual buttons onto the page layout.
5. Select Save or Quick Save and repeat for any other page layouts that should contain the buttons.

Adding a Sub Type to the Event Page Layout

A process can involve Events as well as Tasks. Events can have sub-types that you can use in a filter, or dependency, to determine whether a Step is started or not.

To add a sub-type to the Event Page Layout:

To add the Process Details custom button to Process Object Page Layout(s):

1. In Setup, use Quick Find and type Event Page Layouts.
2. Select Page Layouts.
3. Select Edit next to the Page Layout you want to modify.
4. Drag and drop the Sub Type field onto the page layout to the desired location.
5. Select Save or Quick Save and repeat for any other page layouts that should contain the field.

Overriding the Task and Event View Page with the Conga Orchestrate Visualforce Page

Orchestrate adds an optional new functionality to Salesforce that does not display within standard page layouts.

To override the Task and Event View pages with 's Visualforce page to display additional process information:

In Classic

1. In Setup, use Quick Find and type Activities.
2. Select Task Buttons, Links, and Actions.
3. Select Edit next to the View label.
4. Select the Visualforce Page radio button and select the Task (FSTR_Tasks) from the drop-down list box.
5. Select Save and repeat for the Event view page.

In Lightning

1. In Setup, use Quick Find and type Lightning App Builder.
2. Select Lightning App Builder under User Interface.
3. Select View next to the Event Record Page Label.
4. Click the Activation button at the top right of the page.
5. Click the Assign as Org Default button.
6. Click Save.
7. Repeat steps 2-5 for the lightning page called Task.

Creating Event Sub-Types

Important

You must check the **Enable Event Placeholder Step** checkbox field in the **Setup Information** section of the **Conga Orchestrate Setup**. This setting creates the `sub_type__c` field.

When a process step is an Event Placeholder, Conga Orchestrate waits for an Event with a matching Sub-Type to be created before child step(s) can execute.

To configure Event Sub-Types:

1. In Setup, use the Quick Find and start typing Activity Custom Fields.
2. Select Activity Custom Fields.
3. Select the field label Sub Type.
4. Select Edit next to a Sub Type Value.
5. Enter the Sub Type Label and API Name and click Save.
6. Repeat for all needed Sub Types.
7. Click the Deactivate link next to any values not in use.

Default Team Members

This functionality allows you to specify Team Members for all Accounts owned by a given Account Owner (User).

1. Navigate to the Default Teams tab.
2. Choose the Account Owner using the lookup button to select the user who is an owner of Account records.
3. Add Team Members in the Default Team Members section as desired by using the lookup button.
4. Select the Team Role for each user. You can add, change, or remove the Team Role picklist values in the Team Members object. To set up Team Member Roles:

In Setup, use the Quick Find and type Objects. Select the Object Manager (or Objects in Salesforce Classic).

Select Team Member.

Select the Team Role field.

Add or Edit any roles needed.

See [Editing Account Page Layouts For Roles](#) to add the Team Member related list to your account page layouts.

1. Once you have added the Team Members, determine if you want to apply the team you've configured to all Accounts owned by the selected user by selecting the 'On Save, Automatically Assigned Default Team Members' checkbox.
2. Click Save.

Now when a new Account is created and is owned by this user, their Default Team will populate with these Team Members and Team Roles. Assign Steps within your Definitions to Team Members by choosing "Role" as the Assignee Type.

Connected App Configuration

Note

The [Stabilize the Hostname for My Domain URLs in Sandboxes](#) Salesforce Critical Update must be activated. This critical update is turned on automatically after 7/18/2020.

1. In Setup, use the Quick Find and type in Connected Apps.
2. Click Connected Apps.
3. Click OrchestrateSetup.
4. Select the Edit Policies button.
5. In the Permitted Users dropdown, select Admin approved users are pre-authorized.
6. Select OK to accept the security warning. You will satisfy the requirements in the following steps.
7. Select Save.
8. Scroll down the page and select Manage Profiles or Manage Permission Sets (which one you choose is determined by how you want to manage access to Conga Orchestrate).
9. Choose the Profile(s) or Permission Set(s) that should have access to Conga Orchestrate.
10. Click Save.

After configuring the Orchestrate Connected App, follow the steps below to ensure the Remote Site Settings are properly configured for Conga Orchestrate.

1. In Salesforce Setup, use the Quick Find and type Remote Sites.
2. Select Remote Site Settings.
3. Select the Orchestrate Setup Service Remote Site.
Note: You may have to click Next Page to find and select this Remote Site.
4. Click Edit.
5. Ensure that the Active checkbox is checked.
 - If it is not checked, check the Active checkbox and click Save.

Creating a Master Page Layout

Create a Master Page Layout (template) with the following fields (Contact, Account, Due Date, and Subject) and any other fields you desire. After creating a master Page Layout, you can copy (Save As or clone) it every time you need to create a new page layout and eliminate the need to start from scratch.

1. In Setup, navigate to the custom object for which the master page layout is needed.
2. Select the Page Layouts link or scroll down to that frame.
3. Select the New button.
4. Leave the Existing Page Layout as None.
5. Enter *Master Page Layout in the Page Layout Name field and select the Save button.

 **Note**

The asterisk (*) enables this Page Layout Name to always appear at the top of the list.

6. Drag and drop the Fields, Buttons, and Related Lists to the location you desire and select the Save button.
 - Add Contact, Account, Due Date, Subject as well as any other fields you want future page layouts to have as default
 - Add the Open Activities, Activity History, and Notes & Attachments related lists
 - Add the Process Visual and Process Details buttons

Activating the Conga Composer Remote Site for Generate Document Steps

The article walks through activating the Conga_Composer Remote Site required to use Composer to Generate Document steps.

Important: This task is only required for orgs that upgraded to a new version of the Conga Orchestrate. It is not required for orgs with new installations of Conga Orchestrate.

Activate the Conga_Composer Remote Site to utilize Conga Composer in a Generate Document Step.

To activate the Conga_Composer Remote Site:

1. Navigate to Salesforce Setup.
2. In the Quick Find search box, type in Remote Sites.
3. Click Remote Site Settings.
4. Locate the Conga_Composer Remote Site and click Edit.
5. Check the Active checkbox field to activate the Remote Site.
6. Click Save.

Deleting the PCE - Settings Tab After Upgrading Conga Orchestrate

This documentation only applies when upgrading Conga Orchestrate from Process Composer 12.13 and preceding versions.

After upgrading Conga Orchestrate, delete the PCE - Settings tab that is no longer actively used in Conga Orchestrate. All components of PCE - Settings are now in Conga Orchestrate Setup. Due to current Salesforce functionality, the Conga Orchestrate installed package cannot make this modification automatically.

Follow the steps below to remove the PCE - Settings tab.


Deleting the PCE - Settings Tab in Classic

1. Navigate to Setup.
2. Toggle open the Create section and click Tabs.
3. Under the Visualforce Tabs section, click Del next to the PCE - Settings.
4. Once prompted, select OK to delete the tab. Deleting the PCE - Settings Tab in Lightning
5. Navigate to Setup.
6. Under the Platform Tools section, click User Interface.
7. Click Tabs.
8. Under the Visualforce Tabs section, click Del next to the PCE - Settings.
9. Once prompted, select OK to delete the tab.

Financial Services Cloud Setup

Required if Conga Orchestrate is not installed:

1. Install Conga Orchestrate from the [AppExchange listing](#). (If you want to install in a sandbox choose that option after clicking Get It Now.)
2. Grant Access to All Users.
3. After package install, follow [Basic Setup](#) for Conga Orchestrate and [Assign security using Permission Sets](#).

 There are a few specific Financial Services Cloud setup items listed below. Note that if some of the setup screenshots in the documentation reference classic setup pages, it may make sense to switch to Classic when following the setup steps below.

1. Navigate to Setup in Lightning and select Object Manager under the Objects and Fields Section.
2. Click Business Process.
3. Select Buttons Links and Actions and click the down arrow next to New, then click Edit.
4. Select Standard Page under the Salesforce Classic Override section and click Save.
5. Repeat Step 2 and navigate back to the Object Manager in Lightning Setup.
6. Select Account.
7. Click Page Layouts and click Account (Individual) to access the Account (Individual) Page Layout.
 - Ensure that none of the related lists referenced on [this documentation](#) are added to the page layout.
 - As long as the Contact (Individual) Page Layout is configured as per [this documentation](#), the necessarily related lists will display on the Account (Individual) Page Layout in Lightning.
8. Navigate to the Conga Orchestrate Setup tab to Disable Setting Account Lookup. This will force users to select the appropriate Account (Household or Business) when executing Business Processes.

Navigate to the Conga Orchestrate Setup tab and check the Disable Setting Account Lookup field in the Features Control section of Conga Orchestrate Setup.

Click Save.

Important

Note that when creating page layouts on the Business Process object, include the New Task (FSC) and New Event (FSC) custom actions so that you can create manual Tasks and Events correctly from a Business Process record. In addition, set the Account field to required on all Business Process Page layouts. For information on setting up the New Event Action see, [Setting Up the New Event Action for the Financial Services Cloud](#). For more information about setting up the New Task action, see [Setting Up the New Task Action for the Financial Services Cloud](#).

Setting Up the New Event Action for the Financial Services Cloud

Follow the steps below to set up the New Event Action on the Business Process object.

To set up the New Event Action:

1. Navigate to Salesforce Setup in Lightning and select Object Manager under the Objects and Fields section.
2. Click Business Process.
3. Click Buttons, Links, and Actions.
4. Click New Action.
5. Select Create a Record for the Action Type field.
6. Select Event for the Target Object field.
7. Select Advisor Event for the Record Type field.
8. Enter New Event (FSC) for the Label field
9. Enter New_Event_FSC for the Name field.
10. Click Save.
11. Place any desired fields you would like on the Page Layout. Ensure to place the Sub Type field on the Page Layout that was created when you set up the Event object in the Conga Orchestrate Setup Wizard.
12. Click Save.
13. Navigate back to the Button, Links, and Actions and click New Event (FSC).
14. Click New in the Predefined Field Values section.
15. Select Name (under Standard Fields) for the Field Name field.
16. Insert FSTR__Business_Process__c.FSTR__Client__c in to the Formula Value field.
17. Click Save.
18. Place the new Custom Action on the Business Process Page Layouts that you want the action to appear on.

Setting Up the New Task Action for the Financial Services Cloud

Follow the steps below to set up the New Task Action on the Business Process object.

To set up the New Task Action:

1. Navigate to Salesforce Setup in Lightning and select Object Manager under the Objects and Fields section.
2. Click Business Process.
3. Click Buttons, Links, and Actions.
4. Click New Action.
5. Select Create a Record for the Action Type field.
6. Select Task for the Target Object field.
7. Select Advisor Task for the Record Type field.

8. Enter New Task (FSC) for the Label field
9. Enter New_Task_FSC for the Name field.
10. Click Save.
11. Place any desired fields you would like on the Page Layout.
12. Click Save.
13. Navigate back to the Button, Links, and Actions and click New Task (FSC).
14. Click New in the Predefined Field Values section.
15. Select Name (under Standard Fields) for the Field Name field.
16. Insert FSTR__Business_Process__c.FSTR__Client__c in to the Formula Value field.
17. Click Save.
18. Place the new Custom Action on the Business Process Page Layouts that you want the action to appear on.

Renaming the Conga Orchestrate Salesforce App

When upgrading Conga Orchestrate from a previous version, you must manually rename the Conga Orchestrate App from ProcessComposer to Conga Orchestrate. A Salesforce limitation prevents the Conga Orchestrate installed packages from automatically updating the application name.

Renaming the Conga Orchestrate Salesforce App only applies to Conga Orchestrate instances that are upgraded to the newest version of Conga Orchestrate.

When renaming the App in Lightning, the App Manager allows you to rename the App for both Lightning and Classic. If you are renaming the App in Classic, you can only rename the App for Classic.

To rename the Conga Orchestrate App in Lightning after upgrading to the most recent version of Conga Orchestrate:

1. Navigate to the Setup menu in Salesforce Lightning.
2. Under the Apps section in Setup, click App Manager.
3. Locate the ProcessComposer Apps in the Lightning Experience App Manager and click the drop-down arrow next to the App.
4. Change the App Label from ProcessComposer to Conga Orchestrate and save the changes.
5. Repeat this process for both the ProcessComposer_Lightning and Process_Composer App records.

To rename the Conga Orchestrate App in Classic after upgrading to the most recent version of Conga Orchestrate:

1. Navigate to the Setup menu in Classic.
2. Under the Build selection, click Apps.

3. Click Edit next to the ProcessComposer App.
4. Rename the App Label from ProcessComposer to Conga Orchestrate and save the changes.

Updating Conga Orchestrate's App Logo

This documentation only pertains to upgrading to Conga Orchestrate from ProcessComposer 12.13 and all earlier versions.

When upgrading to the latest version of the Conga Orchestrate, you must change the Conga Orchestrate App's logo to reflect current branding. Current Salesforce functionality does not allow the installed package to automatically update the logo. Follow the steps below to change the Conga Orchestrate application's logo in Lightning and in Classic after upgrading.

ⓘ Before updating the Conga Orchestrate logo, ensure that you [renamed the Conga Orchestrate App](#).

Updating the Conga Orchestrate Logo in Classic

1. Navigate to the Setup menu.
2. Under the Build section of the Setup menu, click the Create arrow to expand the list of options and then click Apps.
3. Click Edit next to Conga Orchestrate.
4. Click Insert an Image.
5. In the pop-out window's dropdown menu, select the Logo folder.
6. Select the Conga Orchestrate Logo.
7. Click Save on the Conga Orchestrate App record.

Updating the Conga Orchestrate Logo in Lightning

1. Search for "Conga Orchestrate Logo" in the master search bar and click the record that is found.
2. In the top menu, click Download to download the logo to your computer.
3. Navigate to the Setup menu.
4. Under the Platform Tools section of the Setup menu, click Apps to expand the list of options and then click App Manager.
5. Locate both records of Conga Orchestrate. One record is for the Lightning App and the other is for the Classic App. Repeat the steps below for both Apps.

6. Click the dropdown arrow for the Conga Orchestrate record and select Edit.
7. Under the Image, click the small blue Clear button.
8. Click Upload and select the recently download Conga Orchestrate Logo.
9. Click the Save button.

Upgrading Conga Orchestrate from the AppExchange

Conga Orchestrate periodically pushes upgrades to all customers automatically, unless you have opted out. You may also upgrade to the latest version of Conga Orchestrate yourself from the Salesforce AppExchange.

To upgrade to a newer version of the product:

1. Navigate to the [Orchestrate AppExchange listing](#) and click Get It Now.
2. Log into your Salesforce account.
3. Select Install in Production or Install in a Sandbox.
4. On the Confirm Installation Details screen, check I have read and agree to the terms and conditions and click Confirm and Install.
5. Select Install for All Users.
6. Click Upgrade.
7. Select Yes, access to these third-party web sites to use this web service to manage access to Conga Orchestrate features.
8. Click Continue. You receive an email notification after the installation is complete.
9. Select Done to return to Setup.

Configure the Connected App

Ensure the OrchestrateSetup Connected App is configured in Salesforce Setup. For more information, see [Installing Conga Orchestrate](#).

Rename the Orchestrate App

When upgrading Conga Orchestrate from a previous version, you must manually rename the Conga Orchestrate Application from ProcessComposer to Conga Orchestrate. A Salesforce limitation prevents the Conga Orchestrate installed packages from automatically updating the application name.

See [Renaming the Conga Orchestrate Salesforce App](#) for instructions on renaming the Conga Orchestrate App.

Update the Conga Orchestrate App's Logo

After you have renamed the Conga Orchestrate App, update the Conga Orchestrate App's logo to reflect current branding. Salesforce functionality does not allow Conga Orchestrate to update the App's logo upon an upgraded installed back.

See [Updating Conga Orchestrate's App Logo](#) for instructions on renaming the Conga Orchestrate App.

Remove the PCE - Settings Tab

The PCE - Settings tab is no longer used in the latest version of Conga Orchestrate. All components of PCE - Settings are now found in Conga Orchestrate Setup. Current Salesforce limitations prevent the Conga Orchestrate installed package from deleting the tab.

See [Deleting the PCE - Settings Tab After Upgrading Conga Orchestrate](#) for instructions on deleting the PCE - Settings tab.

Using Process Definition Quick Starts


Use these processes to get up and running with Conga Orchestrate for several use cases and for an example of how can use Orchestrate in your own business processes

These processes are ready to use as-is, so you can get the feel for how to Orchestrate powers your processes. Clone and modify the processes for your own use cases. Assign steps differently in ways that make sense for your organization and how you have structured your teams in Salesforce.

 Standard or custom user lookup fields, Salesforce Account Teams, Queues. Each will work with Orchestrate.

See the videos and steps below to use these processes. Setup and configuration take approximately 5 minutes.

1. [Install Conga Orchestrate](#) from the AppExchange. If you are not familiar with AppExchange, [watch this video](#) for a walkthrough on installing Conga Orchestrate.
2. [Configure Conga Orchestrate](#).

 We recommend configuring Conga Orchestrate to work with the Salesforce Task object and running processes with the Business Process object that comes ready to use with Conga Orchestrate.

3. Import Conga Orchestrate Processes and try them out.
 - a. Download [this text file](#).
 - b. Use the downloaded text file to import the Conga Orchestrate Processes.

Follow along as we [run one of the example processes](#) in this video overview.

Advanced Setup

This section details advanced setup options for Conga Orchestrate.

All of these items are optional.


- [Use Custom Objects with Conga Orchestrate](#)
- [Configure Non-Working Days](#)
- [Configure Out of Office Link in Classic](#)
- [Gantt Chart Configuration](#)
- [Creating Process Groups for Reporting and Gantt Charts](#)
- [Notify on Assignment](#)
- [Virtual Steps](#)
- [Custom Process Object Lookup Field \(Tasks\)](#)
- [SendGrid Integration](#)
- [Twilio Integration](#)
- [Implications of Enabling Shared Contacts](#)

Conga Orchestrate Scaling Enhancements

The Conga Orchestrate 14.27 package, and all packages following version 14.27, feature scaling enhancements that reduce the overall product footprint in Salesforce orgs.

Note: These scaling enhancements do not impact the current execution of processes.

Although if users configure new object for use, Conga Orchestrate uses the new Process Instance object to track required fields, instead of putting required fields on the new objects themselves.

 You must have Conga Orchestrate version 14.27 or higher to leverage these scaling enhancements.

Scaling Enhancements

- The Business Process and Process Task objects are pre-configured and available immediately upon installation or upgrade.
- Only two fields are now required to configure an object as a Process Object or Step. Previously Conga Orchestrate previously required up to nine fields on Process and Step Objects.
 - Status field.
 - Process Instance field (lookup field to the Process Instance object)
- The Conga Orchestrate installed package includes the managed Process Instance object.

- All fields previously required for Process and Step Objects are now stored on the Process Instance object.
- A tab is not created for the Process Object as it primarily works in the background and requires no user interaction or edits.
- Scaling Enhancements
 - Orchestrate features scaling enhancements that reduce the overall product footprint in Salesforce orgs.

Using Custom Objects as Process Objects, Steps, and Monitored Objects

Conga Orchestrate executes processes based on a given object, its record type, and optionally other field values. Administrators use standard Salesforce functionality to create/modify standard or custom objects, define fields, build page layouts, and define record types. You can use Conga Orchestrate to execute processes against the objects you create in addition to those Conga Orchestrate supports out of the box.

Using Conga Orchestrate with custom objects requires additional setup. An Administrator must add appropriate fields, then creates an Apex Trigger and Test Class to properly associate Conga Orchestrate with the custom object. The code and steps needed to complete the setup are provided in this help documentation. Then, using Conga Orchestrate functionality, Administrators create process definitions using this custom object. Refer to this [Salesforce help and training article](#) for information on adding new custom objects.

Alternatively, use the [Custom Object Wizard](#) in Conga Orchestrate Setup to streamline setting up a custom object for Conga Orchestrate.

For an example of a custom object working with Conga Orchestrate, see the Business Process object that comes installed with Conga Orchestrate. It includes all of the necessary information, as well as record types and page layouts.

You can use your own custom object as an individual Process Object or a Step in Conga Orchestrate, or you can set up your custom object to work as both.

Set up your custom object as:

- [Process Object](#)
- [Step](#)
- [Both a Process Object and a Step](#)
- [Initiator's Monitored Object](#)

Using a Custom Object as a Process Object

Follow these steps to create and use a custom object as a Process Object.

Alternatively, you can use the [Custom Object Wizard](#) in Conga Orchestrate Setup to streamline setting up a Custom Object and Process Object

Note: If the custom process object is from a managed package, and therefore, has a namespace, add the namespace to the Allowed Namespaces field on the [Conga Orchestrate Setup](#) page.

Create a Custom Object using the [Salesforce help article](#), or skip this step if your organization already created a custom object.

1. Ensure these properties are set on the custom object:
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Add Notes & Attachments
 - Allow Search
2. Create the [required fields](#) necessary for Conga Orchestrate to use the custom object as a Process Object.
3. (Optional) Create a Master Page Layout to make creating new page layouts easier in the future.
4. Create a clone of the Master Page Layout for specific processes.
5. Create record types using the [Salesforce help article](#), and associate with Page Layouts for the specific processes.
6. Create an [Apex Trigger](#) for the custom object.
7. Create an [Apex Test Class](#) for the custom object.
8. Create [Process Definitions](#) using your custom object.

Using a Custom Object as a Step

Follow these instructions to create and use a custom object as a [Step](#). Alternatively, use the [Custom Object Wizard](#) in Conga Orchestrate Setup to streamline setting up a Custom Object as a Process Object and Step.

If the custom process object is from a managed package, and therefore, has a namespace, add the namespace to the Allowed Namespaces field on the Conga Process Setup page.

1. Create a Custom Object using the [Salesforce help article](#), or skip this step if your organization already created a custom object.
2. Ensure these properties are set on the custom object:

- Allow Reports.
 - Allow Activities.
 - Track Field History.
 - Add Notes & Attachments.
 - Allow Search
3. Create the [required fields](#) necessary for Conga Orchestrate to use the custom object as a Step.
 4. (Optional) Create a Master Page Layout to make creating new page layouts easier in the future.
 5. Create a clone of the Master Page Layout for specific processes.
 6. (Optional) Create record types using the [Salesforce help article](#), and associate with Page Layouts for the specific processes. A Custom Object Step can be created without a record type.
 7. Navigate to [Conga Orchestrate Setup](#) to set the values that should count as [Closed Status Values](#) in the Status field defined in Step 2 above.
 8. Create an [Apex Trigger](#) for the custom object.
 9. Create an [Apex Test Class](#) for the custom object.
 10. Navigate to [Conga Orchestrate Setup](#) to set the values that should count as Closed Status Values in the Status field defined in Step 3 above.
 11. If you need the ability to assign the steps to a Queue:
 - Add your custom step object to the list of supported objects in the Queue Setup Edit screen.
 - Create a Workflow Rule to notify queue members when a step is created and assigned to the queue.
 12. Optional and for Classic only: If you need the ability to view [Checklist Items](#) on a page layout for a custom object that you've configured to use as a step, create a Visualforce page and add it to all applicable page layouts.

In the Developer Console, create a new Visualforce page. Name it something similar to CustomObjectNameChecklist.

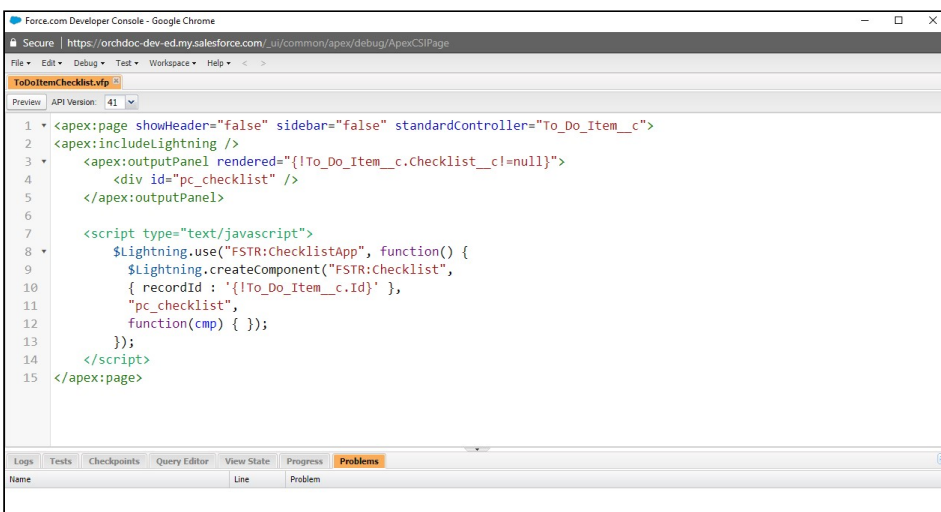
Copy/Paste the following code into the new Visualforce Page window:

```
<apex:page showHeader= "false" sidebar= "false" standardController= "YOUR_
CUSTOM_OBJECT__c" >
<apex:includeLightning />
<apex:outputPanel rendered= "{!YOUR_CUSTOM_OBJECT__c.Checklist__c!=null}" >
<div id= "pc_checklist" />
</apex:outputPanel>
<script type= "text/javascript" >
$Lightning.use( "FSTR:ChecklistApp" , function()
```

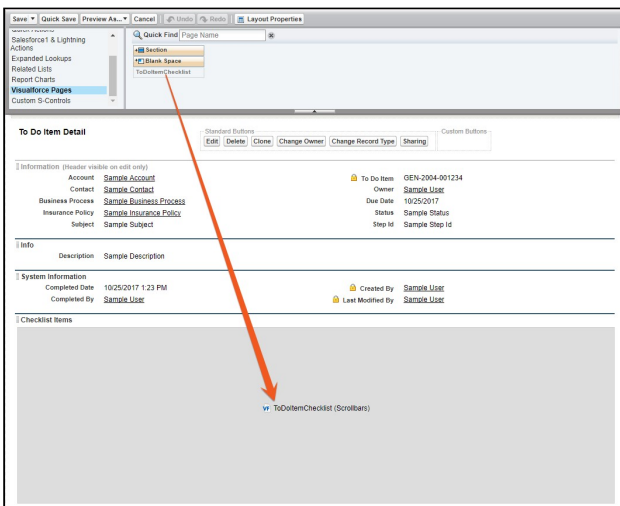
```

{
$Lightning.createComponent( "FSTR:Checklist" ,
{
recordId : '{!YOUR_CUSTOM_OBJECT__c.Id}'
},
"pc_checklist" ,
function(cmp) { });
});
</script>
</apex:page>

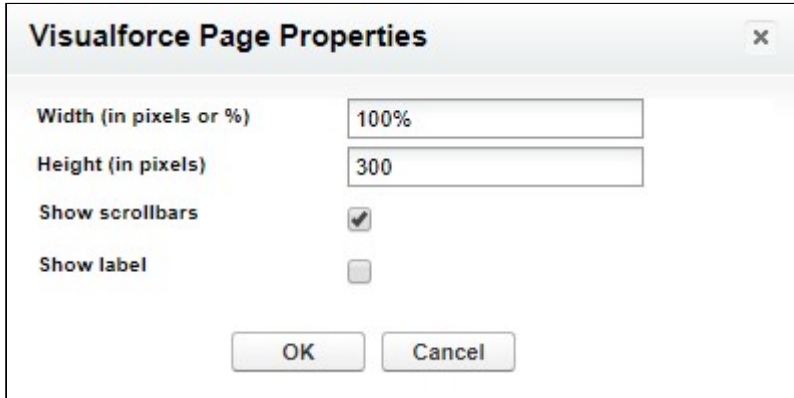
```



Add a new section to the applicable custom object page layouts and add the Visualforce page there.



Edit the properties of the Visualforce Page in the page layout to set the height (probably 300px or above) and Show Scrollbars.



You may now create Process Steps using your custom object. You will see the object in the Object Type to Create a list on [Create Record](#) steps.

Using a Custom Object as a Process Object and Step

Follow these steps to create and use custom objects as both Process Objects & Steps. Alternatively, use the [Custom Object Wizard](#) in Conga Orchestrate Setup to streamline setting up a Custom Object as a Process Object and Step.

If the custom process object is from a managed package and therefore has a namespace, add the namespace to the Allowed Namespaces field on the Conga Orchestrate Setup page.


1. Create a Custom Object using the [Salesforce help article](#), or skip this step if your organization already created a custom object.
2. Ensure these properties are set on the custom object:
 - Allow Reports.
 - Allow Activities.
 - Track Field History.
 - Add Notes & Attachments
 - Allow Search
3. Create the [required fields](#) necessary for Conga Orchestrate to use the custom object as a Process Object and a Step.
4. (Optional) Create a Master Page Layout to make creating new page layouts easier in the future.
5. Create a clone of the Master Page Layout for specific processes.
6. Create record types using the [Salesforce help article](#), and associate with Page Layouts for the specific processes.
7. Create an [Apex Trigger](#) for the custom object.
8. Create an [Apex Test Class](#) for the custom object.

9. Navigate to [Conga Orchestrate Setup](#) to set the values that should count as [Closed Status Values](#) in the Status field defined in Step 2 above.
10. Create Process Definitions using your custom object.
11. If you need the ability to assign the steps to a Queue:
 - Add your custom step object to the list of supported objects in the Queue Setup Edit screen.
 - Create a Workflow Rule to notify queue members when a step is created and assigned to the queue.

Disabling a Custom Object Trigger

Conga Orchestrate gives you the ability to disable custom object triggers created through the setup wizard with the following steps.

- Adding a checkbox field to the Conga Orchestrate Settings custom setting called 'Disable_{Namespace}_{Object_Name}_Trigger' allows custom object triggers to be disabled like standard object triggers.

 **A single underscore between the namespace and the object name is important if there is a namespace. The case does not matter.**

- When the checkbox is selected, the trigger is disabled and will not run.

Using a Custom Object as an Initiator's Monitored Object

Definition Initiators allow you to take process execution to the next level. When setting up an Initiator, tell Conga Orchestrate what Object, which Operations on that Object you desire to monitor, as well as the conditions that should be met in order for a process record to be created. Initiators create the process object record and run the process you've defined. Read more [About Definition Initiators](#).

To allow Initiators to monitor your custom object, follow one of the two methods below to deploy the necessary trigger.

Use Conga Orchestrate Configuration Assistant:

If your custom object is complex and utilizes universally required fields or has more than one master-detail relationship, then the Configuration Assistant will not work properly. Please use the instructions in the [Manually Deploy Necessary Trigger](#) section below.

1. Create a Lookup relationship field from the Process Object (i.e. Business Process, Case, etc.) to your custom object.

2. Ensure your custom object has a Lookup field to the Contact object, and note the API name of the field. If not, create the Lookup field and make note of its API name.
3. Optional: Create a formula field with the label OwnerId so that the API name is ownerid__c. This field is optional and only needs to be created if your custom object is the detail record in a master-detail relationship. The formula field should retrieve the OwnerId from the master object. The structure of the field will depend on how the relationship is named. For example, if your object is related to the account object through a master-detail the formula is "Business_Account__r.OwnerId".
4. Navigate to the [Conga Orchestrate Setup](#) tab.
5. Under the Advanced Setup section of the Conga Orchestrate Setup page click Initiators.
6. Confirm the fields in steps 1-3 above have been created.
7. Select your custom object from the Custom Object dropdown.
8. Choose the Contact Lookup Field that the initiator should relate to the process object when a process initiates.
9. Click the Save button.
10. You will be redirected to the Deployment Status page in Setup to confirm the deployment was successful. These setup steps will automatically create the trigger needed for [Initiators](#) to function properly as well as update the necessary Conga Orchestrate Setup settings.

Manually Deploy Necessary Trigger:

1. Create a Lookup Relationship field from the Process Object (i.e. Business Process, Case, etc.) to your custom object.
2. Ensure that your custom object has a Lookup field to the Contact object. If so, note the API name of the field. If not, create it and make note of the API name.
3. Optional: Create a formula field with the label OwnerId so that the API name is ownerid__c. This field is optional and only needs to be created if your custom object is the detail record in a master-detail relationship. The formula field should retrieve the OwnerId from the master object. The structure of the field will be dependent on how the relationship is named. For example, if your object is related to the account object through a master-detail the formula is Business_Account__r.OwnerId.
4. Edit the Conga Orchestrate Setup setting labeled Initiator Custom Object - Contact Field with the API name of your custom object followed by a colon (:) and the API name of the field in step 3. If there are multiple objects, separate each object: field name pair with semicolons. For example, Custom_Object__c:Contact_Field__c
5. Edit the Conga Orchestrate Setup setting labeled "Initiator Custom Objects" with the API name of your custom object. If there are multiple objects, separate each with

semicolons.

SETTINGS
Initiators^{BETA}

Custom Objects

Configure a custom object as an initiator's monitored object [Learn more](#)

Initiator Custom Object

Talent

Initiator Custom Object-Contact Field

Select Option

6. In a sandbox environment, create a trigger and test class and then migrate them to your production org.

```
trigger CustomObjectTrigger on CustomObjectName(after insert, after
update) {
  string operation = Trigger.isUpdate ? 'Update' : 'Insert' ;
  FSTR.ProcessComposerInitiatorUtils.EvaluateInitiators(Trigger.oldMap,
Trigger.newMap, operation);
}
```

Create a trigger for the custom object. Change the highlighted items in yellow to the custom object name:

Create a [Test Class](#) to test the trigger. It can be similar to the linked example, but you need to create a record that matches the custom object.

Once you have configured your custom object utilizing one of the methods listed above, you can navigate to the [Definition Initiators](#) tab and create a new initiator. Your custom object displays as an option in the Monitored Object list.

Custom Process Details Button and Process Visual Button for Custom Objects as Process Objects

If you configured your own custom object as a Process Object, you will need to create a custom Process Details and Process Visual button and add them to any applicable page layouts. These buttons have already been created for you on the Campaign, Case, Contract, Lead, Opportunity, and Business Process objects when you installed Conga Orchestrate.

Custom Process Details Button:

If you desire to export the information from a process object to Excel or display it on screen, you can create a custom Process Details button on any object used as a Process Object. The Excel output displays any Steps that have been completed, are in process, or maybe created in the future.

1. In Setup, navigate to the Process Object you desire to create the button.
2. Select the Buttons, Links, and Actions link.
3. Select New Button or Link.
4. Enter a Label, Name, and Description for the button.
5. Select these parameters:
 - Display Type: Detail Page Button
 - Behavior: Display in the new window
 - Content Source: URL
6. Configure the URL beginning with /apex/FSTR__ProcessDetails and add parameters (some required, others optional).
 - Required Parameters
 - id - Id of the process object.
 - objType - API object name of the process object (Business_Process__c).
7. Select Save.
8. Add the button to all applicable Page Layouts on the Process Object.

Note: By default, the report displays the Account, Process Name, Step Name, Due Date, Status, Step Object Type, Actual/Estimated (whether the Step has been created or its data is estimated), Assignee, Role, Parent Step, and Stage.

 - Optional Parameters (from columns on the Process Object; use API Names)

Note: You may add up to two additional fields of data to display from the Process Object (p1 and p2).

 - p1 - API name, parameter 1
 - p2 - API name, parameter 2.
 - You may add an additional Column Label (ecl) with an identical value (ecv) on all report rows returned.
 - ecl - Extra column label
 - ecv - Extra column value.
 - Configure the Report Data Export to Excel / CSV
 - xl - True or False (defaults to true if omitted).

Example

```
/apex/FSTR__ProcessDetails?id={!Insurance_Policy__c.Id}
&objType=Insurance_Policy__c&p1=Premium__c&p2=Type__c&xl= false
```


The example URL will look at the selected insurance policy record and display the default columns (described above) as well as the 'Premium__c' and 'Type__c' fields; it will show the report on screen, rather than exporting to Excel.

Custom Process Visual Button:

1. In Setup, navigate to the Process Object you desire to create the button.
2. Select the Buttons, Links, and Actions link.
3. Select New Button or Link.
4. Enter a Label, Name, and Description for the button.
5. Select these parameters:
 - Display Type: Detail Page Button
 - Behavior: Display in new window
 - Content Source: URL
6. Configure the URL beginning with /apex/FSTR__definitionvisual? and add these parameters:
 - defid – Id of the related Definition.
 - recid – Id of the process object record.

Example

```
/apex/FSTR__definitionvisual?defid={!
Insurance_Policy__c.process_instance__c}&recid={!
Insurance_Policy__c.Id}
```

7. Select Save.
8. Add the button to all applicable Page Layouts on the Process Object.

Configuring Non-Working Days (Optional)

All of the Due Date and Delayed Step calculations within Conga Orchestrate can take into account your pre-configured Business Hours in Salesforce to avoid setting due dates on non-working days. This includes company holidays that are specific to your business or country. With Conga Orchestrate, you can prevent Step Due Dates from falling on a weekend or on other specified holidays. You can configure the days that your office is open and only have Task Due Dates fall on those days.

All of the Due Date and [Delayed Step](#) calculations within Conga Orchestrate can take into account your pre-configured Business Hours in Salesforce to avoid setting due dates on non-working days. This includes company holidays that are specific to your business or country. With Conga Orchestrate, you can prevent Step Due Dates from falling on a weekend or on other specified holidays. You can configure the days that your office is open and only have Task Due Dates fall on those days. For example, if you have an important meeting on

Monday and you have your meeting preparation Tasks due the day before the meeting, the preparation Tasks would be due on Friday, not Sunday.

To enable the ability to skip non-working days:

1. In Lightning Experience, select Conga Orchestrate Setup from the App Launcher. In Classic, select the Conga Orchestrate Setup tab.
2. Select the Due Date - Skip Non-Working Days checkbox.
3. Select Save.
4. [Configure your org's Business Hours](#) in Salesforce.

Configuring Business Hours (Optional)

To create your business hours record:

1. At this time, Business Hours settings are only available in Salesforce Classic, so if you are working in Lightning, you will need to switch over to Classic to create a Business Hours record.
2. In Setup, use the Quick Find box and type Business Hours.
3. Select Business Hours.
4. Select New Business Hours.
5. Configure the Conga Orchestrate hours identical to the Conga Orchestrate screenshot below. Specifically, the name needs to be Conga Orchestrate, and the business hours for each day that you are open need to be 9 to 5 PM and the Active box must be checked. The Time Zone should be set to your local Time Zone. You can also go into the business hours record and associate holidays with it. Refer to [Setting Business Hours](#) and [Setting Holiday Hours](#).
6. Select Save.

Important

The holidays override the business hours and set normal business days as non-working days.

Configuring Out of Office Link in Classic

To specify a replacement user while a person is out of the office, follow the steps below. During the time period you specify, Conga Orchestrate assigns all tasks to the replacement user.

1. In Setup, use the Quick Find and type Home Page Layouts.
2. Select Home Page Layouts.

3. Select Edit next to the Home Page layout that needs the Out of Office component.
4. Select the Out of Office checkbox and click Next.
5. Position the Out of Office component in the location you desire and select Save.
6. View your Home Page to see the new Out of Office link.

Using the Out of Office Link in Classic (Optional)

Train your users to use the Out of Office Link to set a replacement user for when they are out of the office.

1. Select the Out of Office link to identify the user who will manage your data while you are out of the office.
2. Select lookup icon to locate the user.
3. Enter the beginning date of your absence in the Out of Office Start field.
4. Enter the ending date of your absence in the Out of Office End field.
5. Select Save.

Configuring a Gantt Chart (Optional)

Gantt visualizations allow you to view your running processes in a Gantt Chart. For processes associated with a valid, active Definition, the Gantt visualization displays process steps in a linear fashion with a list of process steps.

To enable viewing a process in a Gantt chart:

1. Navigate to the Conga Orchestrate Setup tab.
2. Scroll down to or click Process Summary and configure the fields. The defaults are set up automatically though you can optionally customize internal and external colors and labels yourself. During the installation process, Conga Orchestrate sets the colors with default values.
 - Select the Process Summary Enabled checkbox.
 - To optionally display tables of open internal and external steps for the process(es) select the Process Summary: Step Classifications checkbox. Also enables Classifications for internal and external on the Step page.
 - Configure the remaining fields as necessary.
3. Add the Process Visual: Gantt button to all applicable process object (Business Process, Case, etc.) page layouts.

Creating Process Groups for Reporting and Gantt Charts (Optional)

Process Groups enable you to group business processes for reporting and for display in a Gantt chart. Add the Process Group Lookup field to your Process Object page layout (Campaign, Case, Contract, Lead, Opportunity, or Business Process). Then create a Process Group from the Process Group tab.

Add the Process Group Field to Applicable Page Layouts

1. Navigate to the list of page layouts on the applicable object in Setup.
2. Select Edit next to the Page Layout that needs the Process Group field.
3. Find the Process Group field and drag it onto the Page Layout where you want it to display.
4. Repeat for all necessary Page Layouts.

If you are using a custom process object, create a custom Lookup field for the Process Group on your custom object:

To create a Process Group field on your custom object:

1. Navigate to your custom object details in Setup.
2. Navigate to the Fields & Relationships and select the New button.
3. Select Lookup Relationship and select Next.
4. Select Process Group in the Related To drop-down list box and select Next.
5. Enter Process Group in the Field Label box and enter "Displays the Process Group to which this process belongs" in the Description.
6. Select Next.
7. Enable the necessary security and select Next.
8. Select the desired Page Layout(s) where the new field should be displayed and select Next.
9. Specify the title that the related list will have in all of the layouts associated with the parent. Select the desired Page Layout(s) where the new related list should be displayed and select Save.

Creating a New Process Group

1. Navigate to the Process Groups tab.
2. Select the New button.
3. Enter the Process Group Name.
4. Select Start Date and the Expected Completion Date if necessary.
5. Select Save or Save & New to create another Process Group.

Notifying on Assignment (Optional)

When using Salesforce Tasks as Steps within Conga Orchestrate Definitions, you can notify users of Task assignments via the Reminder window. You can control the pop-up reminder window on a per user basis.

Any user that you create after installing Conga Orchestrate has this featured enabled by default.

1. Navigate to the User object in Setup.
2. Select User Page Layouts.
3. Select the Page Layout you desire to add the notification.
4. Drag the Notify on Assignment field to the desired location on your Page Layout.
5. Select the Save button.
6. Repeat to add the field to any other applicable User Page Layout(s).
7. Navigate to specific user records that you would like this enabled or disabled and select or deselect the Notify on Assignment field as desired.

Configuring Virtual Steps (Optional)

Use the Virtual Steps tab to display current and future steps for all active processes. Virtual Steps are designed for analytics (reports, dashboard, Einstein Analytics) and to provide visibility into current and future workload across your teams and overtime based on process Definitions that are currently executing. Conga Orchestrate enables you to configure Virtual Steps for all Process Objects in your organization. All process objects calculate through a daily batch job. Optionally, as actual Conga Orchestrate-generated steps are updated, the associated processes and their virtual step records are recalculated, keeping virtual steps up to date for any processes that are changed.

1. If you are using a [Custom Process Object](#), create a custom Lookup relationship field for each object on the Virtual Step object.
 - Navigate to the Virtual Step object in Setup and add a new Lookup field. Ensure the API name of the object matches the Lookup field on the Virtual Step. For example, the Lookup field for My_Custom_Object__c object API name would have a Lookup field API name of My_Custom_Object__c on the Virtual Step object. This ensures the field is correctly linked.
2. Navigate to the [Conga Orchestrate Setup](#) tab.
3. Navigate to the Virtual Steps section and select the objects you are using with virtual steps.
4. To have virtual steps update as Step object (Task, Process Task, etc.) records are updated, check the box for Virtual Steps: Recalculate

5. Click the Save button to enable the virtual steps.

Customizing the Process Object Lookup Field (Tasks)

By default, Conga Orchestrate uses the Related To (WhatId) field on a Task by default. The field relates the Task to a Business Process or other process object. Alternatively, Conga Orchestrate can use a custom lookup field instead. Use this function if you want to relate Conga Orchestrate-generated Tasks to another standard or custom object using the 'Related To' field.

Salesforce allows custom lookup fields on activities so you can relate Conga Orchestrate-generated Tasks to Accounts or any other standard or custom object via the Related To field, Contacts (via the 'Name' field), and the process object through a new lookup field you create using the setup instructions below).

Important: If you use multiple process objects, you must repeat steps 1-9 for every process object you use.

To custom lookup fields on activities so you can relate Conga Orchestrate-generated Tasks to Accounts or any other standard or custom object via the Related To field:

1. In Setup, use the Quick Find and type Activity Custom Fields.
2. Select the New button.
3. Select Lookup Relationship.
4. Select the Process Object (Business Process, Case, Lead, etc).
5. Enter the Label and Name for the lookup field.

The Field Name and Object API Name for use in the next step. If using a Business Process object lookup, set this field's API Name differently from the Business Process object's API name. For example, use 'BP' for the API name (something other than 'business_process'). The label can be anything you'd like.

1. Navigate to the Conga Orchestrate Setup tab.
2. Click Custom Activity Lookup on the left.
3. Click the Task Steps: Custom Process Object Lookup field and select the new lookup fields.
4. OPTIONAL: Once a custom lookup field is specified, Conga Orchestrate will populate the Task's 'Related To' field with the Process Object's Related Account. To specify a different field to pass through from the process object, specify that field's API Name in the Task Steps: Related To Passthrough Field.
5. Click Save at the top of the Custom Activity Lookup page.
6. Navigate to Salesforce Setup and remove the Open Activities and Activity History related lists from the Process Object's page layouts.

7. Add the new Activities related list to the Process Object's page layouts.

Configuring the SendGrid Integration

Steps to configure the SendGrid integration

Use [SendGrid](#) for your transactional email templates inside of Send Email steps.

This integration works only with SendGrid Legacy Transactional email templates at this time.

Follow the steps below to configure SendGrid integration.

1. [Create a SendGrid account](#).
2. [Add a Remote Site](#).
 - Remote Site URL: <https://api.sendgrid.com>
3. Obtain an API Key. You can read more about API Keys in SendGrid's online documentation [here](#). Log into your SendGrid account and on the left side menu, select Settings. Select API Keys from the sub-menu. Select the Create API Key button. Name the Key and choose Full Access. Select Create & View. Copy the API Key.
4. Navigate to the [Conga Orchestrate Setup](#) tab.
5. Click Email Alerts under the Integration Partners section on the left-hand side.
6. Paste the copied API Key in the SendGrid API Token field.
7. Click Save.

Your transactional email templates will be displayed on the Send Email step along with Salesforce email templates.

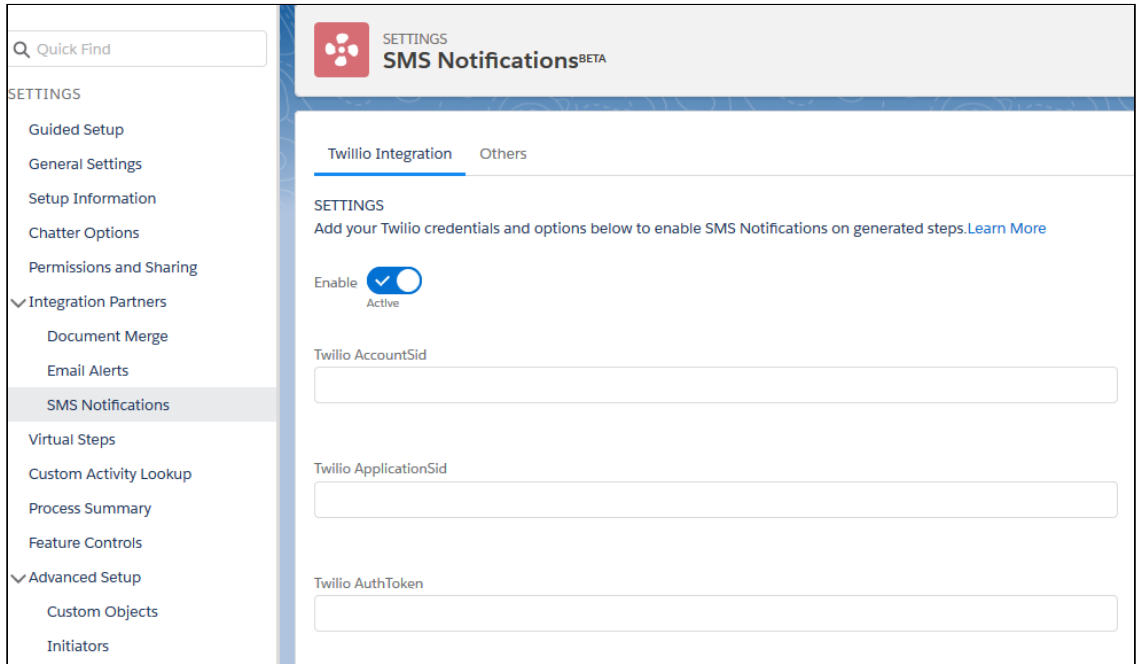
Configuring the Twilio Integration

Use [Twilio](#) for SMS notifications for steps, similar to generating email notifications when a step is created. We're developing additional SMS functionality with future releases.

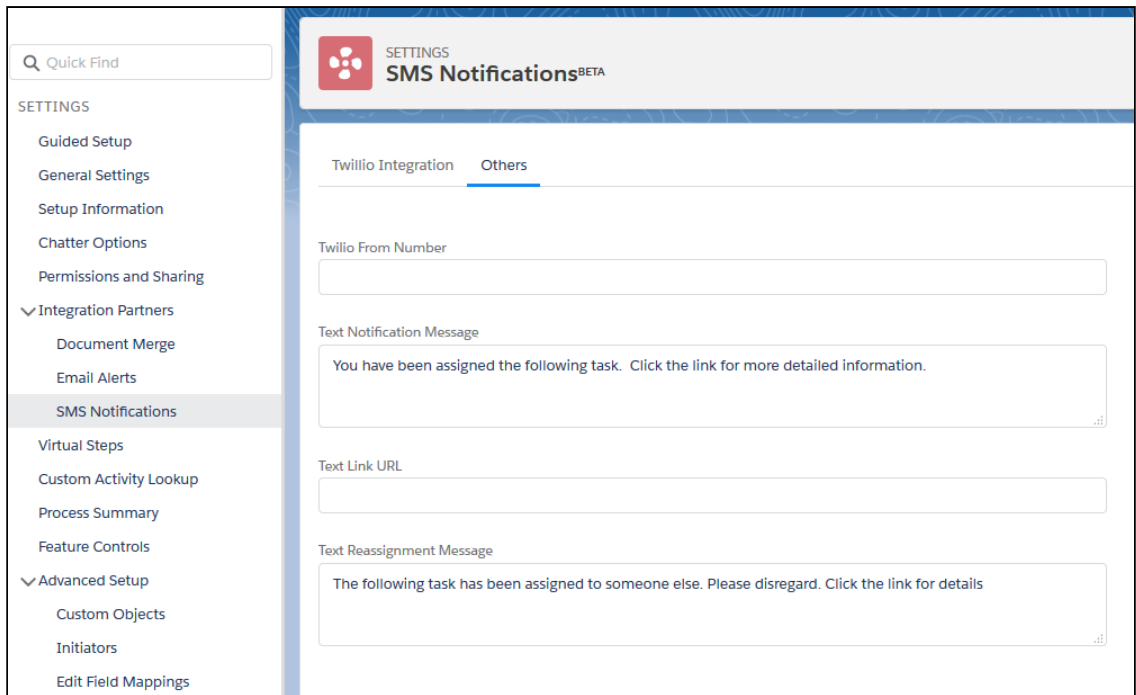
To configure the integration:

1. [Create a Twilio account](#).
2. [Add a Remote Site](#). URL: <https://api.twilio.com>
3. Obtain an AccountSid, ApplicationSid, and Auth Token from your Twilio Console. You can read more about these in Twilio's online documentation [here](#).
4. Navigate to [Conga Orchestrate Setup](#).
5. In the Integration Partners: SMS Notifications section:
 - a. Toggle the Enabled button to Active.

- b. Paste the Twilio AccountSid, ApplicationSid, and AuthToken into their respective fields.




- c. Click the Others tab.



- d. Fill in the Twilio From Number, Text Notification Message, Text Link URL and Text Reassignment Message.

- 6. Save the settings.

Configuring UiPath Integration for Conga Orchestrate

 You must be on the Conga Orchestrate version 14 or higher to use UiPath integration.

Integrate your UiPath bots and queues into an Orchestrate process definition. Once the UiPath integration is successfully configured in Conga Orchestrate Setup, the Automation Step Type becomes available to use in Process Definitions.

To setup UiPath integration with Conga Orchestrate:

1. Navigate to Conga Orchestrate Setup.
2. Select the Robotic Process Automation under the Integration Partners dropdown on the left side.
3. Complete the following fields, specific to the UiPath user that you want to use for the integration.

Note: This information input in these fields is found in UiPath.

- a. Orchestrator URL
 - b. Orchestrator Tenant
 - c. Orchestrator Username
 - d. Orchestrator Password
4. Click Save.
 5. Add the Orchestrator URL as a new Remote Site in Remote Site Settings.
 - a. Navigate to Salesforce Setup.
 - b. Type in Remote Site Settings in the Quick Find search box and click Remote Site Settings.
 - c. Click New Remote Site.
 - d. Enter a name in the Remote Site Name field.
 - e. Paste in the Orchestrator URL in the Remote Site URL field.
 - f. Click Save.

 Ensure that the Active checkbox field is checked.

Once the UiPath is configured in Conga Orchestrate Setup and the Remote Site with the Orchestrator URL is created, Orchestrate users can leverage the UiPath integration by creating an Automation Step in a Process Definition.

For more information on creating and executing Automation Steps, see [Creating a Step with Process Automation](#) and [Executing an Automation Step](#).

Implications of Enabling Shared Contacts

The Shared Contacts feature allows users to relate a single Contact to multiple Accounts (households, businesses, etc.). Formerly, users would have to create duplicate Contacts to accomplish this same goal. With this new feature, each contact still has a primary account, but its other accounts become indirect relationships.

So what are the implications here?

How Shared Contacts Affect Activities

There are several ramifications of the Shared Contacts feature, but the one we'll address in this post primarily relates to Activities. If you use Salesforce Tasks for workflows, you are likely used to relating a Task to a Contact (via the Name field) and then viewing those activities on that Contact's Account. (Conga Orchestrate uses the Task's Related To field to link it to a specific process object.) This is Salesforce's default behavior – rolling those activities up to the Contact's Account automatically for easy viewing.

Per [Salesforce documentation](#):

“By default, the Related To field on an activity determines which account the activity appears on. Often that account ends up being the contact's primary account, but this behavior doesn't always make the most sense. For example, if users can relate a contact to multiple accounts, the contact's primary account isn't always relevant to the activity. It might make more sense for the activity to appear on one of the contact's secondary, or indirect, accounts. You can turn off this default roll up behavior from the Activities Settings page, but be aware of the implications.”

So associating a Contact to many Accounts causes all of those activities to show on that Contact's primary Account even if the activity doesn't seem to logically belong there. In this case, users may think there are too many activities displayed.

For users who disable this roll-up behavior, the Contact's activities will no longer show at the Account level. Here, users may miss seeing those activities.

Correctly Associating Tasks

We have a couple of potential solutions. If the default roll-up behavior is enabled, we can use a formula field to help distinguish tasks that are associated with the primary Account from those that are not.

If the roll-up behavior is disabled, we recommend a solution using a custom Account lookup field that will allow only that Account's activities to display in a separate related list.

Creating an Apex Test Class for a Custom Object as a Process Object

Create the following Class in order to deploy the trigger to your production environment.

If your custom object is the detail record in a master-detail relationship, create a formula field that retrieves the OwnerId from the master object. The structure of the field will be dependent on how the relationship is named. For example, if your object is related to the account object through a master-detail relationship the formula is:

Business_Account__r.OwnerId.

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Class.
5. Give your class a descriptive name. Something like CustomObjectNameTriggerTest.
6. Select OK.
7. Copy/Paste the following code into the new class window:

```
@isTest private class CustomObjectNameTriggerTest { private
static testMethod void Test_CustomObjectNameTrigger ()
{ YOUR_CUSTOM_OBJECT_API_NAME__c fw = new
YOUR_CUSTOM_OBJECT_API_NAME__c(); insert fw;
System.assertNotEquals( null , fw.id); update fw; delete fw; } }
```

8. Replace CustomObjectNameTriggerTest with the name of the class you chose in step 5 above.
9. Replace the CustomObjectName within Test_CustomObjectNameTrigger with the name of your custom object (no spaces).
10. Replace YOUR_CUSTOM_OBJECT_API_NAME__c with the API name of your custom object.

You may need to add additional code to your test method depending on what fields your object requires and validation rules that may be in place. When running tests in step 12, take note of any errors that may occur as these point out required fields that may not have been populated by your test code.
11. Save the class by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Select the Run Test button within the Developer Console.
13. Verify the minimum 75% code coverage was achieved. If applicable, fix any errors and run the test again.

14. Close the Developer Console window.

Refer to the [Deploy from Sandbox with Change Sets](#) module in Trailhead for instructions on the deployment process.

Creating an Apex Test Class for a Custom Object as a Process Object and a Step

Create the following Class in order to deploy the trigger to your production environment.

If your custom object is the detail record in a master-detail relationship, create a formula field that retrieves the OwnerId from the master object. The structure of the field will be dependent on how the relationship is named. For example, if your object is related to the account object through a master-detail relationship the formula is:

Business_Account__r.OwnerId.

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Class.
5. Give your class a descriptive name. Something like CustomObjectNameTriggerTest.
6. Select OK.
7. Copy/Paste the following code into the new class window:

```
@isTest private class CustomObjectNameTriggerTest { private
static testMethod void Test_CustomObjectNameTrigger ()
{ YOUR_CUSTOM_OBJECT_API_NAME__c fw = new
YOUR_CUSTOM_OBJECT_API_NAME__c(); insert fw;
System.assertNotEquals( null , fw.id); update fw; delete fw; } }
```

8. Replace CustomObjectNameTriggerTest with the name of the class you chose in step 5 above.
9. Replace the CustomObjectName within Test_CustomObjectNameTrigger with the name of your custom object (no spaces).
10. Replace YOUR_CUSTOM_OBJECT_API_NAME__c with the API name of your custom object.

You may need to add additional code to your test method depending on what fields your object requires and validation rules that may be in place. When running tests in

step 12, take note of any errors that may occur as these point out required fields that may not have been populated by your test code.

11. Save the class by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Select the Run Test button within the Developer Console.
13. Verify the minimum 75% code coverage was achieved. If applicable, fix any errors and run the test again.
14. Close the Developer Console window.

Refer to the [Deploy from Sandbox with Change Sets](#) module in Trailhead for instructions on the deployment process.

Creating an Apex Test Class for a Custom Object as a Step

Create the following Class in order to deploy the trigger to your production environment.

If your custom object is the detail record in a master-detail relationship, create a formula field that retrieves the OwnerId from the master object. The structure of the field will be dependent on how the relationship is named. For example, if your object is related to the account object through a master-detail relationship the formula is:

Business_Account__r.OwnerId.

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Class.
5. Give your class a descriptive name. Something like CustomObjectNameAsStepTriggerTest.
6. Select OK.

```
@isTest private class CustomObjectNameAsStepTriggerTest { private
    static testMethod void Test_CustomObjectNameAsStepTrigger ()
    { YOUR_PROCESS_OBJECT_API_NAME__c fw = new
        YOUR_PROCESS_OBJECT_API_NAME__c(); insert fw; CustomStepObject__c cso
    = new CustomStepObject__c(); insert cso; update cso; delete cso; } }
```

7. Replace CustomObjectNameAsStepTriggerTest with the name of the class you chose in step 5 above.
8. Replace the CustomObjectName within Test_CustomObjectNameAsStepTrigger with the name of your custom object (no spaces).

9. Replace YOUR_PROCESS_OBJECT_API_NAME__c with the API name of a process object (you can use FSTR__Business_Process__c or the API name of a custom process object you have already set up).
10. Replace CustomStepObject__c with the API name of your custom step object. You may need to add additional code to your test method depending on what fields your object requires and validation rules that may be in place. When running tests in step 13, take note of any errors that may occur as these point out required fields that may not have been populated by your test code.
11. Save the class by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Select the Run Test button within the Developer Console.
13. Verify the minimum 75% code coverage was achieved. If applicable, fix any errors and run the test again.
14. Close the Developer Console window.

Refer to the [Deploy from Sandbox with Change Sets](#) module in Trailhead for instructions on the deployment process.

Creating an Apex Trigger for a Custom Object as a Process Object

In order for Conga Orchestrate to use a custom object you've created, you need to create a trigger and test class in a sandbox environment and deploy them to your production environment.

A trigger is Apex code that executes before or after specific data manipulation language (DML) events occur, such as before object records are inserted into the database, or after records have been deleted. A list of all triggers in your organization is located in Setup under Apex Triggers. You can invoke Apex through the use of triggers. Apex triggers are stored as metadata in the application under the object with which they are associated.

A trigger is Apex code that executes before or after the following types of operations:

- Insert.
- Update.
- Delete.
- Merge.
- Upsert.
- Undelete.

In order for Conga Orchestrate to use a custom object you've created, you need to create a trigger and test class in a sandbox environment and deploy them to your production environment. Salesforce does not allow you to create an apex trigger or apex class directly in a production org. Refer to [Deploy from Sandbox with Change Sets](#) for instructions on the deployment process.

Follow these steps to create the trigger in a sandbox environment:

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Trigger.
5. Give your trigger a descriptive name. Something like CustomObjectNameAsProcessObjectTrigger.
6. Choose the custom object from the sObject dropdown.
7. Select Submit.
8. Copy/Paste the following code into the new trigger window:

```
trigger TRIGGERNAME on YOUR_CUSTOM_OBJECT_API_NAME (after insert,
before insert, before update, after update, before delete, after
delete, after undelete)
{ FSTR.COTriggerHandler.handleProcessObjectTrigger();}
```

9. Replace the TRIGGERNAME inline 1 with the name of your new trigger. This will be the name you chose in step 5 above.
10. Replace YOUR_CUSTOM_OBJECT_API_NAME with the API name of your custom object.
11. Save the trigger by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Close the Developer Console window.

Creating an Apex Trigger for a Custom Object as a Process Object and a Step

A trigger is Apex code that executes before or after specific data manipulation language (DML) events occur, such as before object records are inserted into the database, or after records have been deleted. A list of all triggers in your organization is located in Setup under Apex Triggers. You can invoke Apex through the use of triggers. Apex triggers are stored as metadata in the application under the object with which they are associated.

A trigger is Apex code that executes before or after the following types of operations:

- Insert.

- Update.
- Delete.
- Merge.
- Upsert.
- Undelete.

In order for Conga Orchestrate to use a custom object you've created, you need to create a trigger and test class in a sandbox environment and deploy them to your production environment. Salesforce does not allow you to create an apex trigger or apex class directly in a production org. Refer to the [Deploy from Sandbox with Change Sets](#) for instructions on the deployment process.

Follow these steps to create the trigger in a sandbox environment:

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Trigger.
5. Give your trigger a descriptive name. Something like CustomObjectAsStepProcessTrigger.
6. Choose the custom object from the sObject dropdown.
7. Select Submit.
8. Copy/Paste the following code into the new trigger window. Replace the code that was automatically entered when you created the trigger.

```
trigger TRIGGERNAME on YOUR_CUSTOM_OBJECT_API_NAME (after insert,  
before insert, before update, after update, before delete, after  
delete, after undelete) { FSTR.COTriggerHandler.handleBothTrigger(); }
```

9. Replace the TRIGGERNAME inline 1 with the name of your new trigger. This will be the name you chose in step 5 above.
10. Replace YOUR_CUSTOM_OBJECT_API_NAME with the API name of your custom object.
11. Save the trigger by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Close the Developer Console window.

Creating an Apex Trigger for a Custom Object as a Step

A trigger is Apex code that executes before or after specific data manipulation language (DML) events occur, such as before object records are inserted into the database, or after records have been deleted. A list of all triggers in your organization is located in Setup under Apex Triggers. You can invoke Apex through the use of triggers. Apex triggers are stored as metadata in the application under the object with which they are associated.

A trigger is Apex code that executes before or after the following types of operations:

- Insert.
- Update.
- Delete.
- Merge.
- Upsert.
- Undelete.

In order for Conga Orchestrate to use a custom object you've created, you need to create a trigger and test class in a sandbox environment and deploy them to your production environment. Salesforce does not allow you to create an apex trigger or apex class directly in a production org. Refer to the [Deploy from Sandbox with Change Sets](#) for instructions on the deployment process.

Follow these steps to create the trigger in a sandbox environment:

1. In your sandbox environment, select the Settings Cog icon (in Lightning) or your name (in Classic) in the upper right corner of Salesforce.
2. Select Developer Console.
3. Select File.
4. Hover over New and choose Apex Trigger.
5. Give your trigger a descriptive name. Something like CustomObjectNameAsStepTrigger.
6. Choose the custom object from the sObject dropdown.
7. Select Submit.
8. Copy/Paste the following code into the new trigger window:

```
trigger TRIGGERNAME on YOUR_CUSTOM_OBJECT_API_NAME (after insert,
before insert, before update, after update, before delete, after
delete, after undelete)
{ FSTR.COTriggerHandler.handleStepObjectTrigger();}
```

9. Replace the TRIGGERNAME in line 1 with the name of your new trigger. This will be the name you chose in step 5 above.
10. Replace YOUR_CUSTOM_OBJECT_API_NAME with the API name of your custom object.
11. Save the trigger by pressing Ctrl+S on your keyboard or by selecting File > Save in the top menu of the Developer Console.
12. Close the Developer Console window.

Modifying Custom Triggers to Use Objects as Process Objects, Step Objects, or Both

Add additional code to existing custom triggers to use objects as a process objects, step object, or both for Conga Orchestrate.

Use existing Conga Orchestrate triggers to set up and use an object as a Process object, Step object, or both.

Previously, Conga Orchestrate required administrators to deploy new custom triggers in Conga Orchestrate Setup, or manually create each one, to use an object as a Process object, Step object, or both. For example, a custom object set up as a Process object would require an additional custom trigger to use it as both a Step and Process object moving forward.

Now, administrators can simply add an additional line of code to existing triggers to use an object as a Process object, Step object, or both.

Note: Adding this code to the custom triggers only pertains to users with existing triggers.

To modify an existing trigger:

1. Navigate to Salesforce Setup.
2. Navigate to the desired object using Quick Find Search Box or the Object Manager.
3. Click Triggers.
4. Click the custom trigger created for Conga Orchestrate. Example:
Custom_ObjectStepTrigger
5. Click Edit.
6. Copy one of the code options below and paste it as a new line of code after all the current logic in the trigger.
 - To setup as a Process object,
add: FSTR.COTriggerHandler.handleProcessObjectTrigger();
 - To setup as a Step object,
add: FSTR.COTriggerHandler.handleStepObjectTrigger();
 - To setup as both, add: FSTR.COTriggerHandler.handleBothTrigger();
7. Click Save.

See the example below for correct trigger syntax. Important: Orchestrate requires that the following trigger hooks are present in the modified Apex Trigger:

before insert, after insert, before update, after update, before delete, after delete, after undelete

Custom Object Wizard

Conga Orchestrate allows you to create complex processes with custom objects, in addition to standard Salesforce objects. More specifically, Conga Orchestrate provides functionality to reference custom objects as a [Process Object](#) and [Step Object](#).

To reference custom objects with Conga Orchestrate, use the Custom Object wizard to easily configure custom objects as a Process Object or Step Object:

You must complete the Custom Object wizard to make a custom object eligible as a Process Object or Step Object.

1. Click the Conga Orchestrate Setup tab.
2. Under the Advanced Setup section, click Custom Objects.
3. Choose Process, Step, or Both to proceed with setting the custom object up as a Process Object or Step Object.
4. Click Verify to verify that OAuth is connected.
5. Choose Create New Custom Object or Select Existing Custom Object depending on whether you are using an existing custom object or creating a new one.
 - When creating a new custom object in the Custom Object wizard, enter in values for the name and data type (Text or Auto Number), then click Create a New Custom Object.

- Creating a new custom object automatically generates the mandatory Conga Orchestrate fields and field mapping (Step 6) is skipped.
 - When referencing an existing custom object, choose the specific custom object and click Use Selected Object.
6. Once an existing custom object is selected, map the required Conga Orchestrate fields to existing fields on the custom object, or create new fields using the Custom Object wizard.
 - Select Default in the Custom Object Field to create new custom fields that map to the required Conga Orchestrate fields.
 - Select Choose Existing to choose existing fields that map to the mandatory Conga Orchestrate fields.
 - Click Map Fields to Custom Object once all fields are mapped or created.
 7. Choose which fields are added to the custom object's Page Layout and click Assign Fields.
 8. Choose the field level security for each user profile. Click Save Field Security to apply the selected field-level security to the referenced profiles.
 9. Click Deploy Trigger to deploy the required Trigger and Text Class.

Fields for Custom Objects as Process Objects

Conga Orchestrate requires the following fields and rules when using a custom object as a process object.

⚠ You can customize the Field Labels, but the Field Names must match the object in this table (the "__c" is added automatically by Salesforce). Also, the specified object must have the ability to relate activities to the object.

Object: Field Name	Data Type	Related To	Rules
Auto_Close__c	Date / Time	N/A	Read Only on page layouts.
Business_Account__c	Lookup Relationship	Account	N/A
Client__c	Lookup Relationship	Contact	This field must be required from the master (and all other) page layouts.

Object: Field Name	Data Type	Related To	Rules
Completed_By__c	Lookup Relationship	User	Read Only on page layouts.
Completed_Date__c	Date / Time	N/A	Read Only.
Due_Date__c	Date	N/A	This field must be required from the master (and all other) page layouts.
ownerid__c	Formula - Text	N/A	This field is optional and only needs to be created if your custom object is the detail record in a master-detail relationship. The formula field should retrieve the OwnerId from the master object. The structure of the field will be dependent on how the relationship is named. For example, if your object is related to the account object through a master-detail the formula is "Business_Account__r.OwnerId".
PCE_Definition__c	Text	N/A	Up to 18 characters. Must define length - this field is populated by Conga Orchestrate.
pce_definition_lookup__c	Lookup Relationship	PCE - Definition	N/A
Process_Initiated__c	Date / Time	N/A	Read Only on page layouts.
Recurring_Business_Process__c	Lookup Relationship	Recurring Business Process	N/A

Object: Field Name	Data Type	Related To	Rules
Skipped_Steps__c	Long Text Area (32768)	N/A	Read Only. The maximum number of characters (32,728). Should not be visible on page layouts.
Status__c	Picklist	N/A	Requires Open, Completed, and Canceled values.
Subject__c	Text	N/A	Up to 80 characters in length. This field must be required from the master (and all other) page layouts.
Loop Object Lookup Field		You also need to create a Lookup field on the Loop object (FSTR_Loop_c) that looks up to any custom object used as a Process Object. For example, if you are setting up a custom Legal Agreement object as a Process Object, you must create a Lookup field on the Loop object that looks up to the Legal Agreement object.	

Fields for Custom Objects as Process Objects and Steps

Conga Orchestrate requires the following fields and rules.

Note

You can customize the Field Labels, but the Field Names must match the object in this table (the "__c" is added automatically by Salesforce). Also, the specified object must have the ability to relate activities to the object.

For any other custom fields that you create on this object, do not include text that may match the API name on your Lookup fields. In addition, do not include text in your fields that match any of the other fields that you are creating below. For example, if you have a Case Lookup field, do not create a custom field on this object called My_Case_Status__c. This would match the Lookup field to Case and the Status field defined below. You must abbreviate the field name (label can be any text you desire). Abbreviate your custom field, such as My_Cse_Sts__c.


Object: Field Name	Data Type	Related To	Rules
AlreadyGenerated__c	Checkbox	N/A	N/A
Auto_Close__c	Date / Time	N/A	Read Only on page layouts.
Business_Account__c	Lookup Relationship	Account	N/A
Clause__c	Lookup Relationship	Clause	Required only when using Managed Clauses ({{CCFS}}).
Sub_Clause__c	Lookup Relationship	Sub Clause	Required only when using Managed Sub Clauses ({{CCFS}}).
Client__c	Lookup Relationship	Contact	This field must be required from the master (and all other) page layouts.
Completed_By__c	Lookup Relationship	User	Read Only on page layouts.
Completed_Date__c	Date / Time	N/A	Read Only.
Description__c	Rich Text Area	N/A	N/A
Due_Date__c	Date	N/A	This field must be required from the master (and all other) page layouts.
Email_Queue_Members__c	Checkbox	N/A	N/A
Parent_Event_Id__c	Text	N/A	Up to 18 characters. Mark as an External ID field.
Parent_Object_Name__c	Text	N/A	Up to 255 characters.

Object: Field Name	Data Type	Related To	Rules
PCE_Definition__c	Text	N/A	Up to 18 characters. Must define, but populated by the application.
pce_definition_looku p__c	Lookup Relationship	PCE - Definition	N/A
Process_Initiated__c	Date / Time	N/A	Read-only on page layouts.
Recurring_Business_ Process__c	Lookup Relationship	Recurring Business Process	N/A
Skipped_Steps__c	Long Text Area(32768)	N/A	Read-only. The maximum number of characters (32,728). Should not be visible on page layouts.
Status__c	Picklist	N/A	Requires Completed and Canceled Values. Requires at least one additional value indicating an "Open" status and can include additional Status values.
Step_Id__c	Text	N/A	Up to 18 characters. Mark as an External ID field.
step_lookup__c	Lookup Relationship	PCE - Step	N/A
Step_Stage_Id__c	Text	N/A	Up to 18 characters. Mark as an External ID field.
Subject__c	Text	N/A	Up to 80 characters in length. This field must be required from the master (and all other) page layouts.

Object: Field Name	Data Type	Related To	Rules
Parent Object Lookup Field(s)			You also need to create Lookup fields to all of the Parent Objects that you want to use this object as a step with. For example, if you want to use this object as a step in a process running on the Business Process object; then a Lookup field needs to be created between this object and the Business Process object. The field name must match the object API name, such as Business_Process__c, Case__c, Campaign__c, or Opportunity__c. The field label can be whatever you desire. To use the custom step object as a step in PCE - Definitions, a Lookup field to the object the PCE - Definition is defined against must exist on this object.
Loop Object Lookup Field			You also need to create a Lookup field on the Loop object (FSTR_Loop_c) that looks up to any custom object used as a Process Object and Process step. For example, if you are setting up a custom Legal Agreement object as a Process Object and Step, you must create a Lookup field on the Loop object that looks up to the Legal Agreement object.

Fields for Custom Objects as Steps

Conga Orchestrate requires the following fields and rules.

 You can customize the Field Labels, but the Field Names must match the object in this table (the "__c" is added automatically by Salesforce).

Object: Field Name	Data Type	Related To	Rules
Status__c	Picklist	N/A	Requires Completed and Canceled Values. Requires at least one additional value indicating an "Open" status and can include additional Status values.
Process_Instance__c	Lookup Relationship	Process Instance	N/A

Object: Field Name	Data Type	Related To	Rules
Parent Object Lookup Field(s)	You also need to create Lookup fields to all of the Parent Objects that you want to use this object as a step with. For example, if you want to use this object as a step in a process running on the Business Process object; then a Lookup field needs to be created between this object and the Business Process object. The field name must match the object API name, such as Business_Process__c, Case__c, Campaign__c, or Opportunity__c. The field label can be whatever you desire. To use the custom step object as a step in PCE - Definitions, a Lookup field to the object the PCE - Definition is defined against must exist on this object.		

Lucidchart Integration with Conga Orchestrate

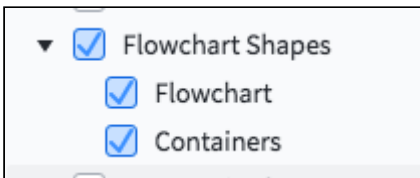
Turn your [Lucidchart flowcharts](#) into powerful business processes in Salesforce with Conga Orchestrate. Conga Orchestrate allows you to easily create new Process Definitions with each imported flowchart.

Note: This is currently a beta feature. You must have Conga Orchestrate version 14 or greater to use this feature.

To create a Process Definition from a Lucidchart diagram, see [Creating Process Definitions from Lucidchart Diagrams](#).

Lucidchart Details

Most Flowchart Shapes, including Flowchart and Containers are supported.



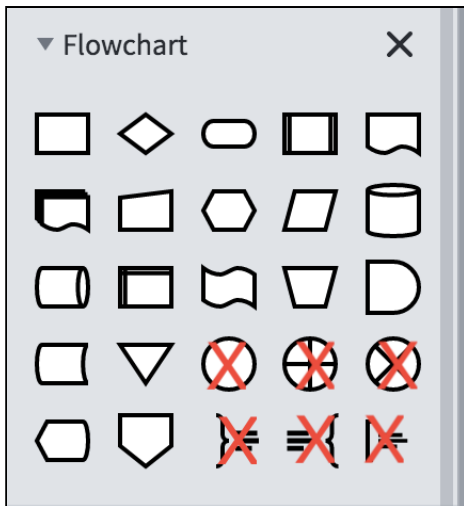
Orchestrate uses Shapes to create Steps for a Process Definition. Additionally, Orchestrate uses Swimlanes for Step Assignees and Containers for Orchestrate Stages for a Process Definition. Arrows between the Shapes indicate the flow of the Orchestrate process.

The images below indicate supported symbols. All symbols other than those with red Xs are supported.

Flowchart Shapes

All Flowchart shapes other than Connector, Or, Summing Junction, Curly Brace Notes, and Notes are supported.

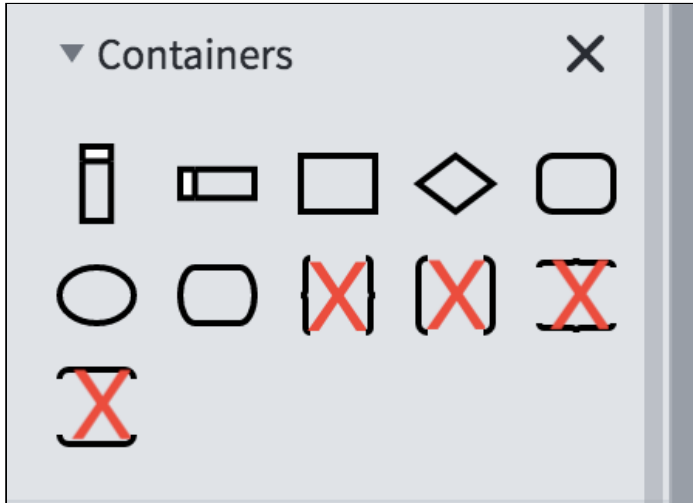
Each of these unsupported shapes is created as an Orchestrate Create Record Step Type. The Shape type is imported into the Comments or Description section of each imported Step for reference.



Containers

Swim Lane containers designate an Orchestrate Step's Assignee Type. Other Containers are used to group Steps, which are imported as an Orchestrate Stage. Steps in Swim Lanes receive that Swim Lane's labeled Assignee Type. Steps in Containers are considered members of that newly-created Stage.

Arrows leading from a Container to a Step are considered to be that Step's Parent Stage. Arrows leading into Containers are ignored. Arrows to or from Swim Lanes are also ignored.



Swim Lanes

Swim Lane labels set Assignees for the Orchestrate Steps that are created. Executing User, User Id, Queue Id, User Fields, and Salesforce Account Team Roles are supported. Simply add them inside the Swim Lanes and Orchestrate imports them accordingly

Learn more about [Assignee Types](#).

- Executing User is set to the Executing User assignee type. Type Executing User in the swimlane. This is the default assignee type if no label is specified or the options below are invalid.
- User Field is the User lookup field on the process object. Type the Label the field API name into the swimlane. It is then imported as the User Field assignee type on the process object. For example, "OwnerId" is read as ProcessObjectName__c - OwnerId.
- Queue Id: Assign to a specific queue. Type in the specific Queue Id into the swimlane. For example, 00G70000001BbgPEAS.
- User Id allows you to assign to a specific user. Type the specific User Id into the swimlane. For example, 0052F000005ODDFQA4.
- Salesforce Account Team Role: If the above does not match, what you type in the swimlane is used to set the Role for the Salesforce Account Team Role assignee type.

Containers - Rectangle, Diamond, Rounded Rectangle, Circle and Pill

Each is supported to group Steps imported as Orchestrate Stages Steps. Arrows connecting the Container (Stage) to another Step are imported as a Stage Child Step.

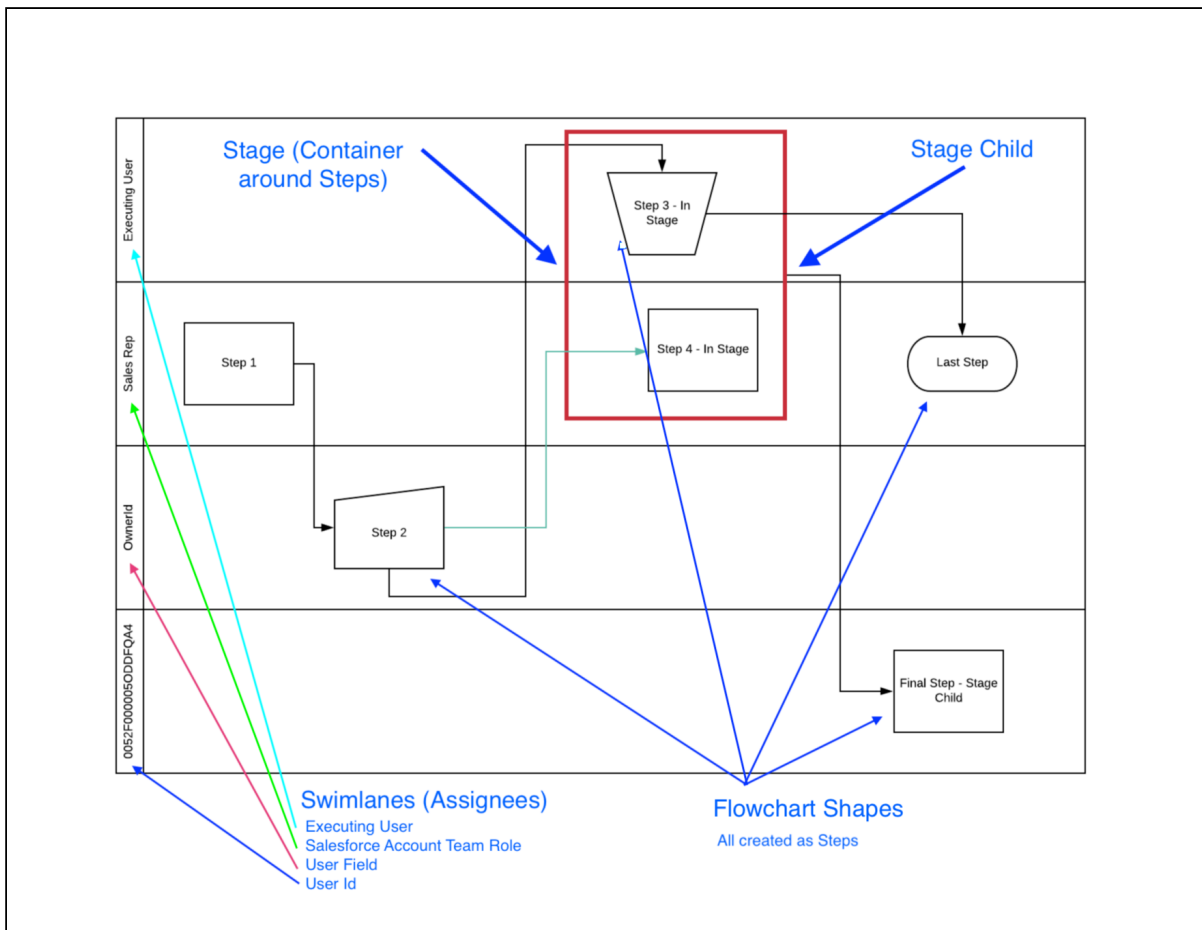
⚠ Double Brace and Double Brackets are not supported. Arrows leading into a Container and from one Container to another are ignored.

Arrows

Ensure that each step only has one Arrow coming into it. If a step has multiple arrows coming in, the behavior during import will be unpredictable. You may have as many arrows leading out of a Step or a Container (Stage) to subsequent Steps as you would like. Additionally, an arrow coming into a Stage is not imported into Orchestrate, as Stages cannot have Parents.

Example Diagram

Below is a Lucidchart diagram that includes Parent/Child Steps (Flowchart Shapes), Stages (Containers around steps), a Stage Child Step, and Swim Lanes with examples of several supported Assignee Types.




Limitations and Known Issues

- Loop back is not supported. (You may add after importing).
- More than one arrow leading into a step will be unpredictable. See note above about more than one arrow leading into a step.
- Arrows leading into Containers (Stages) and Swimlanes are not imported and may cause import issues.
- Add Step creation conditions, validation rules, approvals, checklists, and adjust due dates, etc, after the import.

Creating Process Definitions from Lucidchart Diagrams

Create new Process Definitions from LucidChart diagrams. For more information and details on the integration, see [Lucidchart Integration with Conga Orchestrate](#).

 This is currently a beta feature. You must have Conga Orchestrate version 14 or greater to use this feature.

To create a new Process Definition from a Lucidchart diagram:

1. In Lucidchart, click File → Export → CSV of Shape Data. This exports a CSV file to your machine.
2. From any Definition list view (other than Recently Viewed, which does not display custom buttons) click Create From Lucidchart.
3. Choose File and select the exported file from Lucidchart
4. Type in a name for your new Definition.
5. Choose the Process Object on which processes using this Definition will run.
6. Choose the Step Object and Record Type.
Note: All created steps will use this object and record type combination.
7. Click Create New Definition. If the import and creation is successful, Orchestrate redirects to the newly created Definition. Any errors will display on the page.
8. Edit the Definition and any Steps. Change step types, assignees, due dates, task comments, and add conditions and validations as desired.

Setting Up a Report for Conga Orchestrate

Conga Orchestrate provides key insights into processes on an individual level and on an org-wide basis. Use Conga Orchestrate to facilitate analysis and insights from native Salesforce Reports and Dashboards.

The Conga Orchestrate installed package ships a single dashboard and a handful of useful reports upon installation. Users can customize Conga Orchestrate's Dashboard and Reports as desired.

Conga Orchestrate Dashboard

Navigate to the Dashboards tab and click Conga Orchestrate Dashboard. The Conga Orchestrate Dashboard functions as an insightful hub that details metrics related to past, current, and future processes. The Conga Orchestrate Dashboard includes the following reports by default:

- Open Business Processes
- Business Completion Times
- Average Task Completion Time (Days)
- Current Workload by Assignee
- Future Workload by Assignee
- Current and Future Workload by Assignee
- Process Completion Times Vs Target
- Task Completion Vs Target
- Future Workload By Week

Click Edit to customize the dashboard and include additional reports from the Conga Orchestrate Reports folder.

Individual Conga Orchestrate Reports are located in the Conga Orchestrate Reports folder. These reports display key metrics and insight on the present, past, and future processes.

Presents report detail and report on current processes so that users have key insight on the day to day activity.

- Open Business Processes
- All Business Processes not yet completed, organized by each Definition
- Current Workload by Assignee
- The amount of open (not yet completed) steps assigned to users
- Business Process Activities
- A count of unique Business Processes initiated over a week
- Queued Steps
- All process steps that are currently in a queued status
- PCE - Steps with Checklist Items
- All process steps with checklist items in active processes
- PCE - Definitions with PCE - Steps
- All process steps and active processes
- PCE - Default Teams
- A list of all Team Members currently in Default Teams
- Overdue Business Process Activities

- Processes with due dates prior to the current date that is still in "Open" status
- Opportunities by Definition and Stage
- All Opportunity records with related open and completed processes
- Open Activities by Assignee
- All open process activities assigned to each user
- Field Update Steps
- All steps with a step type of Field Update
- Failed Queued Steps
- All steps with a status of "Error"
- Email Alert Steps
- All steps that send an Email Alert
- Contracts by Definition and Status
- Contract records with related open and completed processes
- Business Process by Status & Definitions
- Business Process records with related open and completed processes
- All PCE - Definitions
- A list of all process definitions in an org
- Activities By Assignee
- All open steps assigned to each user
- Accounts with PCE - Team Members
- Accounts with assigned Team Members Past Reports

Past reports allow users to analyze past processes to determine what processes worked and where improvements should be made.

- Average Task Completion Time (Days)
- The average amount of time it takes users to complete a Business Process
- Business Process Completion Time (Days)
- The average amount of time each Process Definition takes to complete
- Process Completion Times Vs Target
- A comparison of each Process Definition's projected completion time and the actual completion time
- Task Completion Vs Target
- A comparison of the average amount of time taken for a user to complete a task and the average target task completion time
- Process Archive Report
- All past completed processes
- Average Completion Time By Assignee
- Calculates the average completion time for each user based on their completed tasks in the current and previous month
- Activity Task Completion Vs Target

- A comparison of each task's projected completion time and the actual completion time
- Web Service Callout Errors Queue
- All Web Service Callout Errors that have occurred

Future Reports

Future reports provide insight on future workload and allows users to determine and mitigate potential roadblocks in the near future.

- Future Workload by Assignee
- The amount of steps assigned to users that are not yet created
- Current and Future Workload by Assignee
- The total amount of both open steps and steps not yet created that are assigned to each user

Use a Lightning Component to Manage Approvals for a Process Object

Use a Lightning Component to Manage Approvals for a Process Object

Manage Approvals with a Lightning Component

Use Conga Orchestrate's ApprovalList Lightning component to easily manage a Process Object's related Approvals. Using this custom Lightning Component, you can manage all related Approvals by rejecting or approving them directly on the Process Object.

Note

MyDomain must be enabled to utilize custom Lightning Components.

Follow the steps below to add the ApprovalList Lightning Component.

1. Navigate to a record of the Process Object you would like to add the ApprovalList Lightning Component to.
2. Click the Setup icon and then choose Edit Page.
3. Navigate to the Lightning Components on the left hand side and scroll down to the Custom - Managed section.
4. Select and drag the ApprovalList custom Lightning Component onto your Lightning Page layout.
5. Click Save.

Conga Orchestrate Scaling Enhancement

The Conga Orchestrate 14.27 package, and all packages following version 14.27, feature scaling enhancements that reduce the overall product footprint in Salesforce orgs.

Notes

- These scaling enhancements do not impact the current execution of processes. Although if users configure new object for use, Conga Orchestrate uses the new Process Instance object to track required fields, instead of putting required fields on the new objects themselves.
- You must have Conga Orchestrate version 14.27 or higher to leverage these scaling enhancements.

Scaling Enhancements

- The Business Process and Process Task objects are pre-configured and available immediately upon installation or upgrade.
- Only two fields are now required to configure an object as a Process Object or Step. Previously Conga Orchestrate previously required up to nine fields on Process and Step Objects.
 - Status field.
 - Process Instance field (lookup field to the Process Instance object)
- The Conga Orchestrate installed package includes the managed Process Instance object.
 - All fields previously required for Process and Step Objects are now stored on the Process Instance object.
 - A tab is not created for the Process Object as it primarily works in the background and requires no user interaction or edits.
- Scaling Enhancements
 - Orchestrate features scaling enhancements that reduce the overall product footprint in Salesforce orgs.

FAQs Tips and Known Issues

Frequently Asked Questions

What do you recommend to get up and running with Orchestrate?

See [Using Process Definition Quick Starts](#) which includes recorded videos for going through the initial configuration and a process library you can use or clone as you please.

Does Lucidchart work with Orchestrate?

Absolutely! See [Lucidchart Integration with Conga Orchestrate](#) to learn about creating new process definitions from Orchestrate.

Why does my email fail to send when using a Salesforce Email Template in a Send Email Step?

In Send Email Steps using Salesforce Email Templates, the Contact field must be filled in on the process object in order for the email to properly send. This is required even if the email is only sent to a User. Failing to populate the Contact field yields this error message: Email alert failed to send due to either no Contact or Lead specified or a Contact or Lead specified with a blank Email field.


Why is my new Definition not executing?

Ensure that the Active checkbox field on the Definition is checked. A Definition does not execute until the Active checkbox field is checked.

Ensure that all Definition Conditions are met. A Definition with defined Definition Criteria does not execute until all Definition Conditions are met.

I have "Generate Email Notification" checked on my Create Record (Task) step. Why am I not receiving an email?

When using Orchestrate to create Salesforce Tasks, Orchestrate leverages Salesforce's native email reminder functionality. Salesforce designed the email notification to occur when one user assigns a Task to another user. As a result of this functionality, Task assignment email notifications fire when there is a different user completing the parent task than the user being assigned the child task. Task assignment email notifications do not fire if the assigned user is the same for each Task.

 The email notification template is not customizable.

How does Orchestrate handle multiple users in the same Team Role (i.e. Salesforce Account Team)?

The best practice is to assign a single user per role for each Account or Opportunity Team.

How is Conga Orchestrate's behavior different in Salesforce Lightning and Classic?

The majority of Conga Orchestrate's functionality is the same in both Lightning and Classic, although there are some behavioral differences.

For example, the [ApprovalList component](#), which displays all Approvals at the process object level, is only available in Lightning. For Approvals on individual Step records, such as Tasks, the ApprovalItem and ChecklistItem, they communicate with the Lightning page view in real-time. In Classic, the Task page requires a page refresh to see a change in Status when the Approval or Checklist is completed.

How does the Conga Orchestrate work with other Conga products?

In most cases, having the Salesforce packages of Conga Composer, Conga Sign, Conga Contracts for Salesforce, and Conga Collaborate installed and set up is enough for these Conga products to work with Conga Orchestrate.

Minor setup items or limitations are noted within the application:

- Conga Composer and Conga Sign:
 - [Generate Composer Documents](#) from Templates, Solutions, Buttons.
 - [Send Emails](#) from Conga Email Templates.
 - Use Conga Sign Parameters in Composer Solutions and Buttons to generate the document and send for signature.
- Conga Collaborate
 - [Create a New Document](#).
- Conga Contracts for Salesforce
 - Add "Review" Steps that [create and assign a Task](#) related to the Conga Contracts for Salesforce solution.
 - Add [Approvals](#) to the Definition.
 - Add [Looping](#) logic to the Definition.

 **Note**

See Step 6 for details on Looping.

- Add Clause Logic to the Definition.
- Respond to Negotiation Events (Contracts for Salesforce primary file version changes). For detailed information, see [Advanced Functions with Step Creation Conditions](#).
- Add Document Generation and E-Signature functionality (Conga Composer + Conga Sign). For detailed information, see [Creating a Step that Generates a Document](#).

Can Guest Users use Conga Orchestrate?

No - Conga Orchestrate is not compatible with the Guest User profile in Salesforce Communities.

Licensing and Installation

How do I install the latest version of Conga Orchestrate?

Install Conga Orchestrate directly from the Salesforce AppExchange. The link to the Orchestrate AppExchange listing is [here](#).

How do I know I'm on the latest version of Conga Orchestrate?

Conga Orchestrate pushes upgrades to all customers when a new version of the application is made available. The latest version is also available on the Salesforce AppExchange [here](#).

Do all users in my Salesforce Organization need a Conga Orchestrate license?

Not necessarily - Conga Orchestrate allows process steps to be assigned dynamically (such as by Team Roles and User lookup fields), and is not tied to specific users. It may not be possible to know in advance which user records a process may touch and usage may change as the organization changes. Conga Orchestrate is installed with a Site-Wide License, providing all users in the Salesforce organization with access to the application by default.

To determine Conga Orchestrate "users", we look at users who are builders and users of the application. Users are those that define processes and steps, as well as those who are assigned to steps in a running process. In addition, those who access pages or objects included in the Conga Orchestrate managed package. This is identical to what would be required if Orchestrate explicitly assigned user licenses vs. the Site-Wide License structure.

Tips

Stages - [Stages](#) in Conga Orchestrate allow you to group related steps to complete before a child step or steps is kicked off. We've heard situations where Conga Orchestrate users are grouping steps in stages purely for the way they appear in the Visual view. Using staging in this way may have unintended consequences, and is not recommended.

Custom Code - When using your own custom code with Conga Orchestrate fields, make sure all of the classes involved in querying for Orchestrate fields reference the same Orchestrate version. The managed package version is set on Apex Class (in the browser) on the Version Settings tab. These are pulled in automatically when your code references one or more managed packages. For more information, see [Managing Version Settings for Apex](#).

Best Practices for Using Orchestrate with Flow and Process Builder - When using these tools, use Salesforce [best practices for code](#), as these tools are a nice user interface to code that executes behind the scenes. For example, insert all records of the same object type in one insert, just as you would in code. Even if you are using sub-flows, try to do one insert. Additionally, avoid another update to the same object in the same transaction.

There are several more best practices as you utilize these powerful tools. Review the resources below as you design Flows and/or Process Builders that are designed to work alongside or interact with Orchestrate-managed processes.

- [Best Practices for Designing Processes](#)
- [Flow Best Practices](#)
- [Top 10 Flow/Process Builder Best Practices \(Video\)](#)

Known Issues

Process Builder and Orchestrate update limitations

Conga Orchestrate Steps may not fire when the update comes from Process Builder. This applies in cases where Step Creation Conditions are used and the Re-evaluate When the option is set to Process Object Update. In these scenarios, Steps may not fire.

Definition Import

When importing a Definition using Orchestrate's export tool, there is a known error where there are two identically named Steps, and one of those Steps uses looping (i.e. has a Go Back to Step or Go Back to Stage specified). To avoid the error, give each Step a unique name prior to exporting the Definition, then attempt the import again.

Issue with Top-Level Record Update Steps

When generating Composer documents as a child step to a stage that contains Clauses / Clause Bundles, there is a known issue with top-level Record Update steps. When using the Record Update steps, the behavior may be unpredictable. For example, a Composer document may not attach to a record properly. This is because three applications may be making updates to the same record at once. The workaround is to avoid using top-level record update steps when using these clauses-in-stage with docgen setup.

Orchestrate for Users

This section describes how to define and execute processes in Salesforce.

Topic	Description
What's Covered	This section is designed to provide users with information on configuring and running processes. This section covers the most common use cases and assumes a level of familiarity with basic Salesforce.
Primary Audience	End Users
IT Environment	For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix .
Updates	For a comprehensive list of updates for each release, see What's New in Orchestrate Documentation .
Other Resources	See Orchestrate for Administrators for information on installing and setting up Conga Orchestrate.

This section describes the following tasks:

- Create Process Definitions
- Export or Import Process Definitions
- Create Process Steps
- Initiate a Process

Before using Orchestrate, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Conga terms and definitions

Select one of the following topics for more information:

- [Overview of Conga Orchestrate](#)
 - [Introduction to Conga Orchestrate](#)
 - [Introduction to Conga Orchestrate Screens in Salesforce](#)
- [Process Configuration](#)
 - [Process Definitions](#)
 - [Process Steps](#)
- [Running Processes](#)

- [Manually Initiate a Process](#)
- [Automatically Initiate a Process](#)
- [About Definition Initiators](#)
- [Creating a Definition Initiator](#)
- [Record Match Initiators - Button Click](#)
- [Record Match Initiators - Daily Check](#)
- [Event Initiators](#)
- [Recurring Business Processes Overview](#)
- [Starting a Recurring Business Process](#)

Overview of Conga Orchestrate

Select one of the following topics for more information.

- [Introduction to Conga Orchestrate](#)
- [Introduction to Conga Orchestrate Screens in Salesforce](#)

Introduction to Conga Orchestrate

With Conga Orchestrate™, you can define and execute real-world processes end-to-end in a Salesforce environment.

The container holding process Steps is called a Definition. A Definition is a template for a process, and the Definition includes one or more Steps. At each step, a record is created, email sent, field updated, the document generated, or API callout sent. With an Event Placeholder, Conga Orchestrate waits for an event to be scheduled on the Salesforce calendar that will be used to drive other Steps.

First, you name a new process Definition and set conditions under which a created or updated Salesforce record will run the defined process. Then, you add Steps to the Definition, specifying for each Step what happens, who is responsible, when it is due, and more. Steps can progress one at a time, in parallel or as a group (Stages), and conditionally based on criteria you set. Once you have added Steps to the Definition, you have a process template. Defined processes are associated with your Contacts and Accounts. [See how it looks.](#)

Processes can be defined on a Campaign, Case, Contract, Lead, Opportunity, Business Process (a custom object added by Conga Orchestrate) as well as any custom object. When you create or edit records in Salesforce, Conga Orchestrate monitors these actions and executes processes when your Definitions match the record.

Here is how to get started:

1. Follow the [installation](#) and [setup](#) instructions.
2. Watch our [Conga Orchestrate Videos](#).
3. Learn how to [create](#) and [use](#) your own process definitions.

Ready to get started? First, some initial setup is required, which you will find in [Basic Setup](#). Once the setup is complete, we recommend you watch our [Videos](#), which illustrate setting up processes that utilize various pieces of the Conga Orchestrate functionality.

Introduction to Conga Orchestrate Screens in Salesforce

When Conga Orchestrate is up and running, you must create Definitions and add Steps to them. At each Step, a Task is created. For example, when initiated on a Contact, a Definition automatically creates Tasks as previous Tasks are completed, reflecting the flow of a real-world process.

The following Conga Orchestrate screens display in Salesforce.

- Process Definition Detail Screen

ACTION	STEP NAME	DELAY CREATE	PARENT	CREATE IF PARENT	DUE DATE ADJUSTMENT	ASSIGNEE	STEP OBJECT	CREATION CONDITIONS	STAGE	EMAIL NOTIFY	STEP TYPE
Edit Delete New Child	Review Email	<input type="checkbox"/>			Current Date + 0 day(s)	User - Walker Llewellyn	Task - Master	0	Review	<input type="checkbox"/>	Create Record

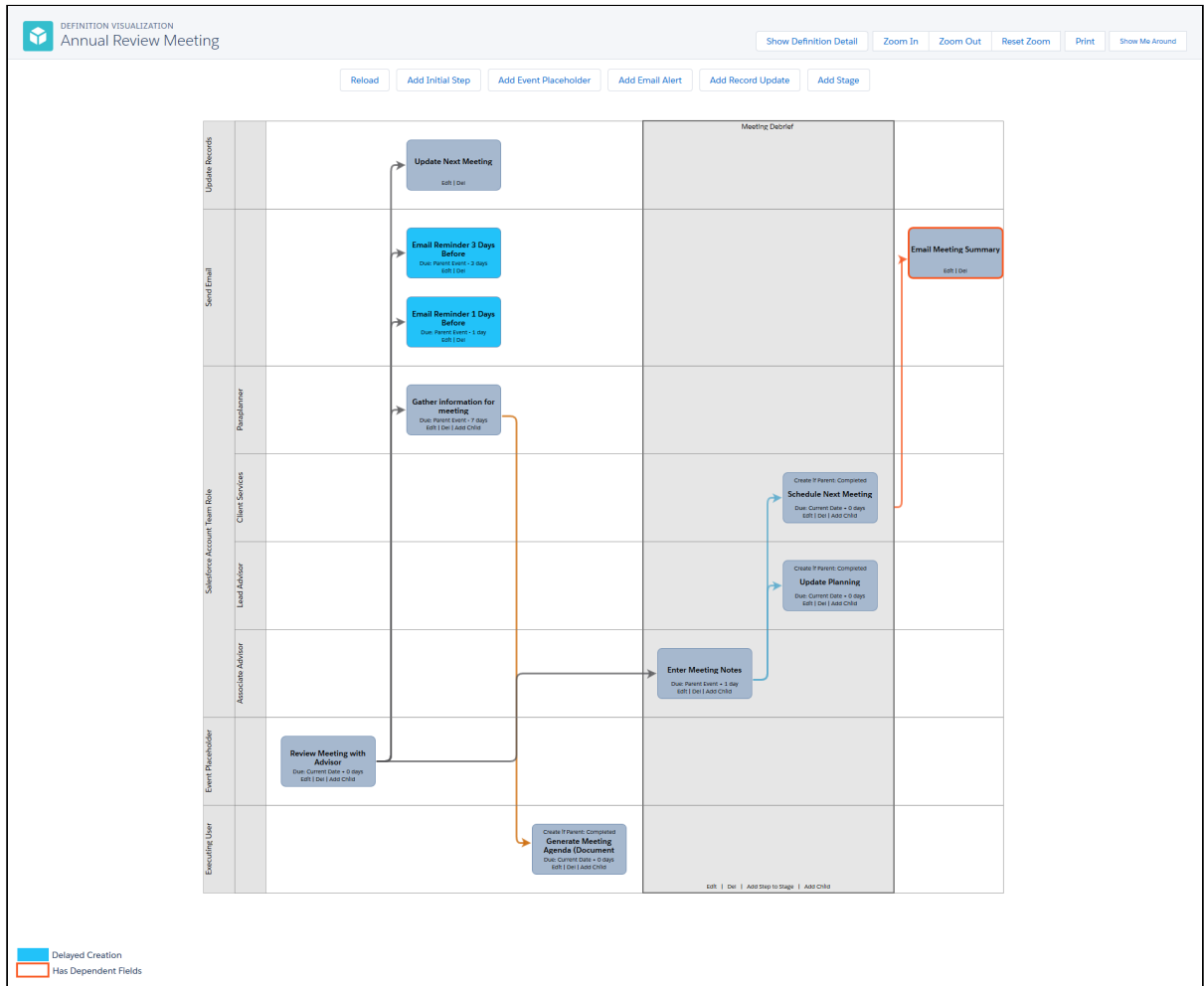
- Business Process Related List on a Contact

Action	Business Process Name	Account	Subject	Due Date	Status	Definition
Edit Del	BP-000007	Finance Inc.	Review Previous Meeting	1/10/2019	Open	
Edit Del	BP-000008	Finance Inc.	Create Finance Report	1/5/2019	Open	*Non-Defined Request

- List of Steps in a Definition

ACTION	STEP NAME	DELAY CREATE	PARENT	CREATE IF PARENT	DUE DATE ADJUSTMENT	ASSIGNEE	STEP OBJECT	CREATION CONDITIONS	STAGE	EMAIL NOTIFY	STEP TYPE
Edit Delete New Child	Review Meeting with Advisor	<input type="checkbox"/>						0		<input type="checkbox"/>	Event Placeholder
Edit Delete	Update Next Meeting Date	<input type="checkbox"/>	Review Meeting with Advisor (Step)				Task - Master	0		<input type="checkbox"/>	Update Records
Edit Delete New Child	Gather information for meeting	<input type="checkbox"/>	Review Meeting with Advisor (Step)		Parent Event - 7 day(s)	Salesforce Account Team Role - Paraplanner	Task - Master	0		<input type="checkbox"/>	Checklist

• Visualization



• Activities

Open Activities							
Action		Subject		Name	Task	Due Date	Status
Edit Cls		Confirm Signed Paperwork		Tom Ripley	✓	5/24/2017	Not Started
Priority		Assigned To					
Normal		Carla Llewellyn					

Activity History							
Action		Subject		Name	Task	Due Date	Status
Edit Del		Open Client Accounts		Tom Ripley	✓	5/19/2017	Completed
Assigned To		Last Modified Date/Time					
Carla Llewellyn		5/19/2017 10:37 AM					

Process Configuration

The container holding process Steps is called a Definition. A Definition is a template for a process, and the Definition includes one or more Steps. At each Step, a Record is created, email sent, field updated, The document generated, or API callout sent.

The container holding process Steps is called a Definition. A Definition is a template for a process, and the Definition includes one or more Steps. At each Step, a Record is created, email sent, field updated, The document generated, or webservice callout sent. An Event Placeholder Step waits for an Event associated with the process (and with a matching Sub-Type value) to create before any of the Steps following it (Child Steps) can begin. Thus, it holds the place of an Event that will occur as part of the process.

A Definition is a template for an individual process, the conditions under which it is created (Object, Record Type, Criteria) and which Steps kick-off as a result.

A Definition tells the system:

- When a process should execute (object type, record type, or any additional criteria).
- The order in which the steps occur
- Conditions under which to create steps
- What steps are grouped together (staging)

A process executes when a record is created or updated in Salesforce. The record must match the Object Name field on the Definition and the Record Type must match the Object Record Type field on the definition. In addition, if you wish to further qualify the process, add additional process criteria that the record must match. (See the decision tree to help determine when Record Types and criteria apply.) You base the criteria on the following list of field types. The criteria can look at fields on the object you specify in the Object Name field for the Definition. You can also base criteria on fields from the related account and contact.

- Text fields
- Picklist fields
- Checkbox fields
- Currency fields
- Number fields
- Percent fields

This chapter contains the following topics:

- [Process Definitions](#)
 - [Adding Criteria to a Process Definition](#)
 - [Automatically Create a Document after Adding Clause Bundles with Conga Orchestrate](#)
 - [Automatically Create a Document after Adding Managed Clauses with Conga Orchestrate](#)
 - [Creating a Process Definition](#)
 - [Exporting a Single Definition](#)
 - [Exporting Multiple Definitions](#)

- [Importing and Exporting Definitions](#)
- [Importing Definitions](#)
- [Process Objects](#)
- [Process Stages](#)
- [View Your Conga Orchestrate Usage](#)
- [Process Steps](#)
 - [Advanced Functionality with Step Creation Conditions](#)
 - [Assignee Types for Process Steps](#)
 - [Configuring Closed Status Values](#)
 - [Creating a Step that Adds Managed Clause Bundles](#)
 - [Creating a Step that Adds a Managed Clause](#)
 - [Creating a Step that Creates a Record](#)
 - [Creating a Step that Generates a Document](#)
 - [Using the New Composer Endpoint URL in Generate Document Steps](#)
 - [Create a Step that Posts to Chatter](#)
 - [Creating a Step that Sends an Email](#)
 - [Creating a Step to Update Records](#)
 - [Creating a Step with an Event Placeholder](#)
 - [Creating a Step with an API Callout](#)
 - [Creating a Step with Robotic Process Automation](#)
 - [Executing an Automation Step](#)
 - [Delayed Steps](#)
 - [Managing the Status of a Step with an Approval](#)
 - [Managing the Status of a Step with a Checklist](#)
 - [Step Creation Conditions](#)
 - [Step Field Validations](#)
 - [About Process Steps](#)
 - [Process Tasks vs. Tasks \(Salesforce Activity\)](#)

Process Definitions

Create a Process Definition with Conga Orchestrate.

Adding Criteria to a Process Definition


When creating a process definition, select `Add DefinitionCriteria` to add one or more additional criteria to act as condition(s) for when the process should run. (For example, run only if an Account's Industry is 'Manufacturing'.) When all rules are met, the process executes. Criteria is used to further refine when a Definition should be used. Along with the

Object Name and its Record Type, each condition must be met for a process to kick off using this Definition.

1. See [Creating a Process Definition](#).
2. Select the + Add Definition Criteria link.
3. Select the Object Name the process will run on.
 - Campaign
 - Case
 - Contract
 - Lead
 - Opportunity
 - Business Process

 **Note**

Select +Add Row to include additional criteria.

4. Select the Field Name that you desire to qualify. This field changes depending on the type of Object Name you select.
5. Select the type of Operator to compare the value against.
6. Enter the Field Value or select the Field Value from the drop-down list box depending on the Field Name you select.
7. The Data Type displays the type of Field Name you select.  Note: The Data Type field auto-populates.
8. If there are multiple criteria for the definition, the Joining Operator field indicates how this value is combined with the other values. Conga Orchestrate combines the OR operators first and then the AND operators for a final AND operation. Logically, this would look like DF1 AND DF2 AND DF3 AND (DF4 OR DF5 OR DF6) if there were 6 definition criteria and 1 through 3 had a joining operator of AND and 4 through 6 had a joining operator of OR.

Automatically Create a Document after Adding Clause Bundles with Conga Orchestrate

Create a Definition that automatically generates a document after completing Clause Bundle steps. This allows users to automate Clause Bundle selection and the creation of a contract document that includes the selected Clauses.

To create a Definition that generates a document after completing Clause Bundle steps:

1. Navigate to the existing Definition or [create a new Definition](#).
2. [Create a new Stage](#) for the Clause Bundle steps.
3. Click New Stage Step on the stage.

4. Change the Step Type field value to Clause Bundle.
5. Begin typing the desired Clause Bundle name in the Clause Bundle Name field and select the Clause Bundle.
6. Enter a numeric value in the Clause Bundle Sort Order field.
7. Click Save.
8. Repeat Steps 3 - 7 for each Clause Bundle needed.

 **Note**

Each Clause Bundle for the contract document requires its own Clause Bundle step.

9. Navigate back to the stage and Click New Stage Child Step.
10. Change the Step Type field's value to the Generate Document.
11. Fill out the required Step Name field and customize the Generate Document step by selecting field values for the Application, Source, and Merge Template fields.
Note: For more information on the Generate Document step, see [Creating a Step that Generates a Document](#)
12. Click Save.

Automatically Create a Document after Adding Managed Clauses with Conga Orchestrate

Create a Definition that automatically generates a document after completing Clause steps. This allows users to automate Clause selection and the creation of a contract document that includes the selected Clauses.

To create a Definition that generates a document after completing Clause steps:

1. Navigate to the existing Definition or [create a new Definition](#).
2. [Create a new Stage](#) for the Clause Bundle steps.
3. Click New Stage Step on the stage.
4. Change the Step Type field value to Clause.
5. Begin typing the desired Clause name in the Clause field and select the Clause.
6. Select a value in the Configuration picklist field to select a Clause Configuration for the Clause.
7. Click Save.
8. Repeat Steps 3 - 7 for each Clause needed.
Note: Each Clause for the contract document requires its own Clause step.
9. Navigate back to the stage and Click New Stage Child Step.
10. Change the Step Type field's value to the Generate Document.

11. Fill out the required Step Name field and customize the Generate Document step by selecting field values for the Application, Source, and Merge Template fields.



Note: For more information on the Generate Document step, see [Creating a Step that Generates a Document](#)


12. Click Save.

Creating a Process Definition

After adding criteria to the process definition, you can create your process definition.

To create a Definition

1. Click the **Definitions** tab.
2. Select the **New** button.
3. Complete the following fields:
4. Definition Information:
 - Definition Name - Enter the name for this definition template.
 - Is Active - Select the check box to make the process active after creating the definition.
 - Categories - Select the field(s) used to categorize the definition.
 - Use the  icon to remove chosen fields.
 - Click one or more fields in the Available list box and then click the  icon to add your selections to the Chosen list box.
5. **Disable Object Management** - Select the checkbox to disable Object Management. The Status field of the process object will not be managed by Conga Orchestrate when Object Management is disabled. If this checkbox remains unchecked, Orchestrate sets the Status field to Completed when all steps in a process are complete.
6. **Definition Conditions**
 - Object Name - select Campaign, Case, Contract, Lead, Opportunity, or Business Process in the list. See [Process Objects](#) for additional information.

 See [Using a Custom Object as a Process Object](#) to use your own object.

 - Object Record Type - select an available record type based on the selection made in the Object Name list, or click the Create Record Type link to create a new record type.
 - (Optional) Select the Add Definition Criteria link to enter [additional criteria](#) that must be met for the process to run after the rules are met.

- (Optional) Status Options: When Process Status Set To - Select the Process Status value that will determine the Set Open Step To field.
 - Set Open Steps To - Select the Step Status value determined by the value of the When Process Status Set To Example: When Process Status Set To Completed, Set Open Steps To Completed.
 - Description - Enter a description for the process definition.
 - Use the Toolbar to add formatting to the description. You can also insert an image or add a link.
 - (Optional) Owner - Change the default selection if you want another user to be the owner of the definition template.
7. Select the **Save** button.

Exporting a Single Definition

To export a single Definition:

1. Navigate to the Definitions tab.
2. Select the Definition Name of the definition you desire to export.
3. Select Export.
4. The file will download or you will be prompted to save the file to your computer. This will depend on the browser you are working in and your particular browser "file download" settings.
5. Name and Save the file and note the file location.

Exporting Multiple Definitions

You can also export multiple definitions.

To export multiple Definitions:

1. Navigate to the Definitions tab.
2. Select the List View that shows the definitions you desire to export. Select the "All" List View to see all Definitions.
3. Select the checkboxes next to the Definitions you desire to export.
4. Select Export Selected.
5. The file will download or you will be prompted to save the file to your computer. This will depend on the browser you are working in and your particular browser "file download" settings.
6. Name and Save the file and note the file location.

Importing and Exporting Definitions

Before exporting and importing Definitions between Salesforce organizations, ensure that you first migrate all Salesforce customizations. This includes Record Types, Page Layouts, Custom Fields, Validation Rules, and so on. The easiest way to migrate customizations is through [Change Sets](#).

Refer to:

- [Exporting a Single Definition](#)
- [Exporting Multiple Definitions](#)
- [Importing Definitions](#)

Importing Definitions

To import Definitions:

1. Navigate to the Definitions tab.
2. Select a List View.
3. Select the Import Definitions button.
4. Select the Choose File button.
5. In the File Explorer popup, navigate to the exported file and open it.
6. Select Process File.
7. Note any errors and resolve them as appropriate. Errors typically occur if you have not properly migrated your Salesforce customizations.
8. Verify Record Types and configure any User Assignments.
9. Select the Import button.

All Definitions are imported with the Is Active box unchecked. Each process will not execute until their Is Active box is checked.

Process Objects

A Process Object is an object used to run processes. Standard objects such as Campaigns, Cases, Contracts, Leads, and Opportunities can be used as Process Objects. Conga Orchestrate ships with a custom Process Object called Business Process. You can also [configure your own custom object as a Process Object](#).

If Require Validation for Converted Leads is not checked in the Lead settings, a process won't fire when an opportunity is created, even if there is an initiator looking at the opportunity. If that setting is not visible, a case will need to be opened with SF Support.

Download this Conga Orchestrate Object Diagram to get a better understanding of the objects and relationships used in the Conga Orchestrate app.

Use this decision tree to determine when a new Page Layout and Record Type are necessary, and when adding criteria to your process definition will be sufficient to translate your process with Conga Orchestrate.

Illustrates how to decide between creating a process using a unique page layout and record type, versus using a 'global' record type with multiple processes that execute based on set criteria.

Process Stages

A Stage is a group of Steps. All Steps in a Stage must be completed (or have conditions that will prevent their creation while also being set to 'Ignore in Stage Completion') before steps that follow it (called Child Steps) can execute. Unless all Stage Steps are 'canceled', Child Steps execute after the Stage completes successfully. Staging enables users to have Steps with multiple Parent Steps (e.g., all Steps in a Stage must be complete before the Child is created). Stages can be used to facilitate parallel approvals when used in conjunction with [Approvals](#).

To create a Stage, a Definition is needed. Refer to [Creating a Process Definition](#).

To create a Stage:

1. Navigate to the Definition where you desire to add the Stage.

2. Select the New Stage button.

Definition Detail										
Definition Name Contract Approval Process							Is Active <input type="checkbox"/>			
Categories [Ⓜ]										
▼ Definition Conditions										
Object Name Contract							Object Record Type New			
OBJECT NAME	FIELD NAME	OPERATOR	FIELD VALUE	DATATYPE	JOINING OPERATOR					
contract	conga_contracts_type__c	Equals	NDA	PICKLIST	AND					
contract	billingcountry	Equals	USA	STRING	AND					
▼ Description										
Description [Ⓜ]										
Created By Walker Llewellyn							Last Modified By Walker Llewellyn			
Created Date 11/16/2018 12:20 PM							Last Modified Date 11/16/2018 1:48 PM			
Owner Walker Llewellyn										
Steps New Step ▼										
ACTION	STEP NAME	DELAY CREATE	PARENT	CREATE IF PARENT	DUE DATE ADJUSTMENT	ASSIGNEE	STEP OBJECT	CREATION CONDITIONS	STAGE	EMAIL NOTIFY
Edit Delete New Child	Upload Contract Document	<input type="checkbox"/>			Current Date + 2 day(s)	User - Walker Llewellyn	Task - Master	0		<input type="checkbox"/>
Stages New Stage										
ACTION	STAGE NAME	NUMBER OF STEPS	NUMBER OF CHILD STEPS							

3. Enter the new Stage Name and select the Save button.
4. To add steps to the stage, select the New Stage Step button and fill out the fields appropriately. Refer to [Process Steps](#).

You can also edit already existing steps to add them to a stage. Edit the step and populate the Stage field with the stage you created in the steps above.

When editing a Step and the Stage field is populated, the Ignore In Stage Completion checkbox appears. Select this checkbox if the Step is part of a Stage and you desire to ignore the Step when determining whether Child Steps of the Parent Stage create. For example, if 2 of 3 Stage Steps complete and the 3rd is set to "Ignore In Stage Completion", the Stage will be considered complete and Child Steps create. The default is unchecked and the Stage will not ignore the Step when the Stage completes. This only applies to steps that are skipped (for example: due to Step Creation Conditions). Any steps that are not skipped will still need to be completed for the stage to be considered complete.

View Your Conga Orchestrate Usage

Use the Display Usage button to display all statistics for Conga Orchestrate usage.

1. Navigate to the Definitions tab.
2. Change the view from Recently Viewed to any other view. This reveals the custom list view button.
3. Click Display Usage.

Process Steps

Create individual Steps within a Process Definition.

Advanced Functionality with Step Creation Conditions

Step Creation Conditions in a Definition's step allow you to conditionally determine whether or not a step is created. A step is only created if the designated Step Creation Conditions are fulfilled.

Conga Orchestrate now features cross object functionality within Step Creation Conditions. This allows you to reference objects that are related to the Definition's master object and their corresponding fields. In the Creation Condition user interface, you can reference both child and parent objects and leverage master-detail relationships, as well as look-up relationships.

Referencing a Related Object In a Step Creation Condition

For example, if the Definition's master object is Opportunity, Step Creation Conditions allow you to reference the Opportunity's Primary Contact (a custom Contact lookup field) as a related object.

Once the related object is selected in the Creation Condition user interface, you can choose any of the corresponding fields of that related object as criteria for the Step Creation Condition.

When the field from the related object is selected, it is referenced within the Creation Condition's statement. Using the Operator and Field Values fields, the cross object field reference is now available to conditionally determine whether or not the step is created.

An example of drilling down to child data in Step Creation Conditions is referencing an Opportunity's related Opportunity Products. When drilling down, the Creation Condition user interface provides Drill Down Operators to allow for advanced filtering of child records.

Drill Down Operators help define or narrow down the amount child records related to a parent record that is included within a Step Creation Condition.

Create a Trigger to Drill Down to Child Data and Use the Reevaluate When Field

Using the Reevaluate When field to reevaluate upon a process object change, in conjunction with drilling down to child data in a Step Creation Condition, requires the use of a custom trigger. The trigger below only pertains to Step Creation Conditions that use both the Reevaluate When field with a process object change and drill down to child data.

Without a custom trigger, users need to manually edit the process object to kick off the Reevaluate When field and allow Conga Orchestrate to evaluate the drilled down child object criteria. The custom trigger allows Conga Orchestrate to reevaluate drilled down child object criteria without the user making manual edits on the parent process object. More specifically, the custom trigger forces an update on the parent process object to prompt the Step Creation Condition.

Follow the steps below to implement the custom trigger.

1. Navigate to Salesforce Setup.
2. Under the Objects and Fields section, click Object Manager.
3. Choose the child object of the parent process object. For example, if the process object is Opportunity and the drilled down criteria is on the Opportunity Product, select Opportunity Product in the Object Manager.
4. Click Triggers.
5. Create New to create a new trigger.
6. Delete the pre-existing code.
7. Copy and paste the code below into the new trigger and replace the text in the squared brackets with the child and parent objects, then click Save. [NameOfTrigger (can be named anything)] > [ChildObject_API_Name](after insert, after update, before delete){ Set<Id parentObjectIds = new Set<Id (); [ChildObject_API_Name] childObjects = Trigger.isDelete ? Trigger.old : Trigger.new; [ChildObject_API_Name] childObject : childObjects){ [ParentObject_Lookup_Field]); }
FSTR.ForceReevaluateSvc.forceReevaluatePreFuture(parentObjectIds); }

Below is an example trigger for a Step Creation Condition that drills down to the Opportunity Product and uses the Reevaluate When field with the process object (Opportunity).

```
trigger OpportunityLineItemTrigger on OpportunityLineItem (after insert,
after update, before delete) { Set<Id> parentObjectIds = new Set<Id>();
List<OpportunityLineItem> childObjects = Trigger.isDelete ? Trigger.old :
Trigger.new ; for (OpportunityLineItem childObject : childObjects)
{ parentObjectIds.add(childObject.OpportunityId); }
FSTR.ForceReevaluateSrvc.forceReevaluatePreFuture(parentObjectIds);}
```


Below is an example trigger for a Step Creation Condition that drills down to the CPQ Quote Product and uses the Reevaluate When field with the process object (CPQ Quote)

```
trigger QutoeLineTrigger on SBQQ__QuoteLine__c (after insert, after update,
before delete) {Set<Id> parentObjectIds = new
Set<Id>();List<SBQQ__QuoteLine__c> childObjects = Trigger.isDelete ?
Trigger.old : Trigger.new ; for (SBQQ__QuoteLine__c childObject :
childObjects) {parentObjectIds.add(childObject.SBQQ__Quote__c); }
FSTR.ForceReevaluateSrvc.forceReevaluatePreFuture(parentObjectIds);}
```

Using the Custom Criteria Filter for Multiple Step Creation Conditions

If you have more than one step creation condition, use the Custom Criteria Filter to determine how the Step Creation Conditions are evaluated together. Use the And/Or links to automatically insert the corresponding logic in the Custom Criteria Filter, or manually type your filters in the Custom Criteria Filter text box.

Use the Reevaluate When to define scenarios that require Step Creation Conditions to be reevaluated. Check the Deletable checkbox option in the Step's Advanced Settings section to delete a created Step automatically when Creation Conditions no longer match.

 The Advanced Settings section is only present on the Create Record Step Type.

For example, you can automatically reevaluate defined Step Creation Conditions when a Contract's primary document File has a new content version uploaded by choosing Event and File Version Change as the field values for the Reevaluate When field.

Assignee Types for Process Steps

An Assignee is the user or queue to which a step can be assigned. Here is an overview of the Assignee Type options you have when creating your Steps.

- **User** - Select a specific active User in your organization.
- **User Field** - Select any User Lookup field from the Related Account, Contact, or Process Object. Formula fields that include the word "user" in their API name display in the User Field list. The formula field must resolve to a User ID for this to work correctly.
- **Parent Object Owner** - Selects the Owner of the object specified in the Object Name field of the related Definition.
- **Related Account Owner** - Selects the Owner of the related Account.
- **Queue** - Select a Queue. This option is only available when the Object Type to Create is an object in which queues ownership can be assigned.

To use Approvals with Step Objects in Queues:

- a. Create an Approvals Queue (give it any name you like) and add the Step Object Approval and Process Instance objects to it.
- b. The Queue will show up as Assignee Type on the Step and your Queue will be on the list.

To use Checklists with Step Objects assigned to a Queue, add the Step Object, Checklist object, and Process Instance objects to the Queue.

- **Executing User** - Selects the User that caused the step to execute. This is usually the user initiating a process if the step doesn't have a parent, or the user completing the parent step.
- **Salesforce Account Team Role** - Select a specific role based on the Salesforce Account Team member on the related Account. This utilizes native Salesforce Account Team functionality. See this [Salesforce Knowledge Article](#), to configure Salesforce Account Teams and Roles. To set up default Salesforce Account Teams: Enable Account Teams in Setup if you have not done so already. See this [Salesforce Knowledge Article](#) for more information. When enabling Salesforce Account Teams, you will have the ability to automatically add the Account Team related list to account page layouts you specify.
 - In Setup, use the Quick Find and type in Users. Select a User in which to assign a default team. Navigate to the Default Account Team section. Click the Add button. Use the lookups to find Users to add as Team Members. Set their Account, Opportunity, and Case access as well as their Team Role. Select the Automatically add my default account team to accounts that I create or accounts that are transferred to me checkbox to have the team

automatically populate when an account is created or transferred to the user in which you are adding the team members.

Select the Update account teams with these members checkbox to have the team automatically populate on the accounts owned by the user in which you're adding the team members. Click Save.

- **Role** - Select a specific role based on the Team Member record on the related Account. Because native Salesforce Account Teams don't support having the same user assigned to multiple roles, we created Team Members. To set up Team Member Roles:
 - In Setup, use the Quick Find and type in Objects. Select the Object Manager (or Objects in Salesforce Classic). Select Team Member. Select the Team Role field. Add or Edit any roles needed.
 - See [Editing Account Page Layouts For Roles](#) to add the Team Member related list to your account page layouts.
 - Add Team Members to all applicable accounts. See [Default Team Members](#) to automatically add Team Members based on Account Owner. Select the magnifying glass icon to Lookup the user. Select a Team Role. Click Save.

- **Process Team Role** - The Process Team Role option defines global (org-wide) roles for your company. For example, if you have one user in your company that always performs the same task(s) for the entire company (not specific accounts), such as data processing or scheduling meetings, create a Process Team Member with the role of Office Assistant or Scheduler and assign it to that user. Then you can assign a step in a Definition to that Process Team Member's Role. To set up and assign Process Team Roles:
 - In Setup, use the Quick Find and type in Objects. Select the Object Manager (or Objects in Salesforce Classic). Select Process Team Member. Select the Team Role field. Add or Edit any roles needed. Navigate to the Process Team Members tab. Click the New button. Select the magnifying glass icon to Lookup the user. Select a Team Role. Click Save.

- **Salesforce Opportunity Team Role** - If Opportunity Teams are enabled in your Salesforce org and the Definition's object name is set to Opportunity, then the Salesforce Opportunity Team Role assignee type will show as an option. See this [Salesforce Help & Training article](#) for more information on enabling and using Opportunity Teams.

Configuring Closed Status Values

Use the following process to enter the closed status values applicable to your organization.

1. Navigate to the Conga Orchestrate Setup tab.
2. In the Closed Status Values field, enter the closed status values applicable to your organization. The default fields are Completed and Canceled. Add any additional values and separate them by semi-colons. The values must match status values you define in the Status field on your custom step object. Refer to Fields for Custom Objects as Steps.
3. Select Save.

Creating a Step that Adds Managed Clause Bundles

Add Managed Clause Bundles and the related Managed Clauses to a record using Conga Orchestrate.

Use Conga Orchestrate to dynamically select and add Clause Bundles for Contracts for Salesforce solution. The Clause Bundle step in a [Process Definition](#) allows users to add Clause Bundles and each related Clause record as Managed Clauses to a Salesforce object record. Step Creation Conditions provide the functionality to conditionally determine when a Clause Bundle should be added and subsequently adds the related Clauses as Managed Clauses to a process object record.

Note: Conga Orchestrate 13.72 or greater must be installed to use the Clause Bundles Step Type. Conga Contracts for Salesforce version 1.97 or greater must be installed.

Follow the steps below to add a Clause Bundle step to a Process Definition.

1. Navigate to an existing Definition or create a new Definition.
2. Click the dropdown arrow next to the New Step button and select Clause Bundle.
3. Name the step by filling out the Step field.
4. Begin typing the name of the desired Clause Bundle in the Clause Bundle field and select a Clause Bundle.
5. Enter a number value for the Sort Order value to determine the Clause Bundle's sort order. If there are multiple bundles defined, ensure unique values are used for the sort order.
6. (Optional) Click + Add Creation Condition to add Creation Conditions to the Clause Bundle step.
 - Creation Conditions conditionally determine if a step is created and executed. It is recommended to use Step Creation Conditions if a Definition has multiple Clause Bundle steps.

- For more information on adding Step Creation Conditions, see [Step Creation Conditions](#).

Note: If a Definition contains several Clause Bundle steps, and those bundles contain some of the same clauses (overlapping clauses), the overlapping clauses are only added once regardless of how many bundles contain those clauses. Additionally, if a step has Creation Conditions with the Reevaluate option selected and Deletable is checked, Orchestrate may not remove all clauses in another bundle containing those overlapping clauses and will continue to match its own Step Conditions.

Creating a Step that Adds a Managed Clause

Use Conga Orchestrate to dynamically select and add Clauses for Contracts for Salesforce solution. The Clause step in a [Process Definition](#) allows users to add a Clause and each related Sub Clause record as Managed Clauses to a Salesforce object record.

Step Creation Conditions provide the functionality to conditionally determine when a Clause should be added and subsequently adds the related Sub Clauses as Managed Clauses to a process object record.

Note: Conga Orchestrate 14.62 or greater must be installed to use the Clause Step Type. Conga Contracts for Salesforce version 2.30 or greater must be installed.

Follow the steps below to add a Managed Clause step to a Process Definition.

1. Navigate to an existing Definition or create a new Definition.
2. Click the dropdown arrow next to the New Step button and select Clause.
3. Name the step by filling out the Step field.
4. Begin typing the name of the desired Clause in the Clause field and select a Clause.
5. If the selected Clause has more than one related Clause Configuration record, select the desired Clause Configuration record in the Clause Configuration field.
6. (Optional) Click + Add Creation Condition to add Creation Conditions to the Clause Bundle step.
 - Creation Conditions conditionally determine if a step is created and executed. It is recommended to use Step Creation Conditions if a Definition has multiple Clause steps.
 - For more information on adding Step Creation Conditions, see [Step Creation Conditions](#).

Note

If a Definition contains several Clause and Clause Bundle steps, and those bundles contain some of the same clauses (overlapping clauses), the overlapping clauses are only added once regardless of how many bundles contain those clauses. Additionally, if your Step has Creation Conditions with both the Reevaluate option and Deletable option checked, Orchestrate may not remove all Clauses if another Clause Bundle contains those overlapping Clauses and continues to match its own Step Conditions.

Creating a Step that Creates a Record

When a step of this type executes, a standard or custom object record is created. In the Step Edit screen, you need to define the record type to create in addition to the other step parameters.

Action	PCE - Step Name	Email Alert	Delay Create	Parent	Create if Parent	Due Date Adjustment	Assignee	Step Object	Field Deps	Stage	Email Notify
Edit Del	Send Welcome Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>					0			<input type="checkbox"/>

Note

If you already have steps in the Definition, you can either use the **New Child** link next to the Step name while viewing the Definition or you can use the **New Child Step** button while viewing the existing Step (towards the bottom of the page).

1. Navigate to the Definition where you desire to place this step.
2. In the Steps section of the screen, click the **New Step** button.
3. Complete the following fields:
 - **Step Name** - Enter the name for this Step. This field copies into the Subject when the process executes.
 - **Step Type** - Select **Create Record**.
 - **Status Managed By** - select one of the following picklist values:
 - **Approvals** - Select **Approvals** to manage the status of the step based on whether the step was approved or rejected. For more information, see [Managing the Status of a Step with an Approval](#).
 - **Checklist** - Select **Checklist** to manage the status of the step using a checklist. When the **Step Checklist Items** section displays, review the information provided. During process execution, the completion of all configured checklist items determines when a step's status is updated to **Completed**.
 - **Status Field** - Select **Status Field** to manage the status of a step with the **Status** field located in the step **Information** section of the Step.

- Create Record Only - Select Create Record Only if you do not want to have the status of the step determined by additional criteria.
- Parent Step - Use Lookup to define the parent step, which is the step that must be completed before the Create Record step is initiated.
 - Leave the field blank if the Create Record step needs to be initiated as soon as the process starts.
- Parent Stage - If a parent step is part of a Parent Stage, all of the steps in the stage must complete before the Create Record step is created.
- Definition - The field is automatically populated based on the Definition.
- Stage - Use Lookup to select the Stage to associate with the Create Record step, if applicable.
- Object Type to Create - Select the type of object that should create when this step executes.
- Object Record Type to Create - Select the record type that should be assigned to the record that is created when this step executes. This field dynamically displays the record types from the object you specify in the Object Type to Create field.
- Assignee Type - Select the type of Assignee to whom the step should be assigned. See [Assignee Types](#) for more information.
- Assignee - Use Lookup to select the person who should be assigned to the step.
- Generate Email Notification - Select the checkbox to send an email message to the Assignee, notifying them that the step was created.
- Due Date Adjustment Base Date - Select the option that should be used to calculate the due date of this step.
 - Current Date - Calculation is based on the current date, which is the date the step is created.
 - Parent Object - Calculation uses the Due Date field on the object specified in the Object Name field in the Definition screen. If the Object Name field is set to Lead, Campaign, or Opportunity, the current date is used in the calculation.
 - Parent Event - Calculation uses the Event date as the base date for the calculation. This only applies if the step is a child of an Event Placeholder step.
 - Date Field - Calculation uses any Date or DateTime field from the Related Account, Contact, or Process Object.
- Due Date Adjustment - Enter a negative (before date) or positive (after date) number to add or subtract from the date in the Due Date Adjustment Base Date field.

- For example, if you enter 5, the due date of this step will be calculated by adding five days to the date in the Due Date Adjustment Base Date field. A common example is the steps that need to be due prior to a parent event, such as meeting preparation steps. Enter -3 if this step should be due three days before the meeting. This step would need to be a child of an Event Placeholder step and the Due Date Adjustment Base Date would need to be set to Parent Event.
- Delay Creation - Select the checkbox to define the conditions that must be met before the email is sent, or specify a certain date the email is sent. Populate the adjusted due date fields:
 - Send Date Adjustment Base Date - The date selected in this field will be used to calculate when the delayed email alert will be sent.
 - Parent Object - Calculation uses the Due Date Field on the object specified in the Object Name field for the Definition.
 - Current Date - Calculation is based on the current date. The current date is the date that the Send Step is created.
 - Parent Event - Calculation uses the Event date as the base date. This only applies if the current step is a child of an Event Placeholder Step.
 - Date Field - Calculation uses any Date or DateTime field from the Related Account, Contact, or Process Object selected.
 - Send Date Adjustment - This number will be added to the date specified in the Send Date Adjustment Base Date field.
- Skip if Past Due - Select the checkbox to skip the step if the calculated due date is in the past (earlier than today).
- Copy Subject From Parent Process Object - Select the checkbox to copy the Subject from the Parent Process Object instead of the Step Name field.

 **Note**

Does not apply to Standard Object process objects, only to custom objects used as process objects.

- Deletable - Select the checkbox to allow users to delete this step in an executing process. The default is unchecked and will prevent a user from deleting a step in a process.
 - A Step is deleted automatically when Deletable is selected, Step Creation Conditions are used, the Reevaluate When the option is selected, and the Creation Conditions for the Step no longer match.
 - Stop Process if Status Set To - Select a value to stop the process when that Status occurs.
4. Configure any needed [Step Creation Conditions](#).

5. Configure any needed [Step Field Validations](#).
6. Step Loop Back Criteria - Use Conditional Logic to determine if the process loops back to a previous step or stage.

Note: The Step Loop Back Criteria section is only available for steps where the Step Type field is set to Create Record, the Status Managed By field is set to Approval or Status Field, and the Parent Step or Parent Stage fields are populated.

 - Go Back to Step - Select a preceding step to loop the process back to.
 - Go Back to Stage - Select a preceding step to loop the process back to.
 - Add Loop Back Criteria - Create a conditional statement, referencing specific objects and fields, to determine if the step will loop back.
7. Enter applicable process information in the Capture Object Information section.
 - For example, if Task is chosen as the Object Type to Create, you can add specific instructions to the Description field telling the user what they need to do in order to complete the step. When this step executes in a process, the task is created and these instructions show in the Comments field on the task.
8. Select the Save button.

Creating a Step that Generates a Document

As part of a process, a Generate Document step automatically generates a document using a Mix template or a Conga Composer template, solution, or button and saves the resulting document to the process object in Salesforce. A Generate Document Step can also reference a Conga Sign-integrated Composer solution or button to generate and send a document for e-signature.

Note

- In order to create a Generate Document step, a valid license to Conga Composer and/or Collaborate is required. If creating a document and sending it for e-signature, a Conga Sign license is also required.
- A single Composer document can be generated within a single Orchestrate definition at a time. If you want to send documents in bulk, you must purchase Conga Trigger or Conga Batch events.

To create a Generate Document step:

1. Navigate to the Definition where you desire to place this step.
2. In the Steps section of the screen, click the New Step button.
3. Complete the fields below:

- Step Name - Enter a name for the step.
- Step Type - Select Generate Document.
- Parent Step - Use Lookup to define the parent step, which is the step that must be completed before the Generate Document step is initiated.
 - Leave the field blank if the Generate Document step needs to be initiated as soon as the process starts.
- Parent Stage - If a parent step is part of a Parent Stage, all of the steps in the stage must complete before the Generate Document step is created.
- Stage - Use Lookup to select the Stage to associate with the Generate Document step, if applicable.
- Application - Select Composer or Collaborate to identify the source application for the document template:
 - Composer - Select Template, Solution, or Custom Button and then make a selection from the available options. See details on this option below.
 - Collaborate - In the field, Create New Document is automatically selected as the action.
 - Define the options for the generated document:
 - Output to PDF (only applicable to Composer) - Select this option to generate the document as a PDF file.

4. Click Save.

Using Conga Composer to Generate Documents

When you choose Conga Composer as the selected Application, the options available must be from the same Object Type as the Definition to which you want to add a Generate Document Step. Document Generation will occur in background mode.


The Source picklist allows you to choose one of the following options:

- Template - Uses the process object's Id as the Master Object record.
- Solution - Uses the Custom Button URL field on the selected Solution record.
- Custom Button - Uses the configured Button URL. Only button URLs that begin with "/apex/APXTConga4__Conga_Composer" will display as options.

For Solution and Custom Button options:

- You must pre-define a template in the Composer solution or button with the TemplateID parameter.
- Allowed merge fields are process object and user merge fields in parameters.

- When creating a Composer solution or button URL to use for a Generate Document step, the button URL can only contain merge fields that start with "{!User.", "{!ProcessObject." (object definition is triggered by), "{!Today()}", and "{!Now()}". Any other merge fields or formulas in the button URL are not supported at this time.
- Template fields are also supported.
- Embedded URL formulas are not supported.
- A workaround is to build a formula field on the process object and include it in the URL.

 When using a lookup field as the value of the OFN parameter, only the record id displays as the file name. A workaround is to use a QVar to pull in the record name.

Using Conga Composer and Conga Sign to Generate and Send Document for E-Signature

A Generate Document step that references a Conga Sign-integrated Composer solution or button generates and sends a document for e-signature with Conga Sign. Follow the same steps in the Using Conga Composer to Generate Documents section above to leverage a Conga-Sign integrated Composer solution or button.

The Composer solution or button must also contain required Conga Sign Integration parameters to successfully create and send a Conga Sign Transaction with Conga Orchestrate. A Conga Sign-integrated Composer solution or button referenced in a Create Document step functions in full background mode. Add the required parameters below to your Composer solution or button.

- TemplateID
- APIMode=3. If you are using V2 Composer Endpoint, set DS7=1142
- CSRecipient
- CSVisible = 1

Using the New Composer Endpoint URL in Generate Document Steps

Important

Ensure that the Conga_Composer Remote Site is activated in your org. Orgs that upgrade to a new version of Conga Orchestrate must activate the Conga_Composer Remote Site. Activating the Remote Site is not required for new installations of Conga Orchestrate. For more information on activating the Conga

Composer Remote Site, see [Activating the Conga Composer Remote Site for Generate Document Steps](#).


It is highly suggested to use the new Composer Endpoint URL to maximize document generation performance and Composer's suite of parameters within a Generate Document step leveraging Composer.

The new Composer Endpoint URL generates documents more quickly when firing a Generate Document Step. It also provides administrators with access to more [Composer parameters](#), to further customize the document generation process.

To use the new Composer Endpoint URL in a Generate Document Step:

1. Navigate to Conga Orchestrate Setup.
2. Click Document Merge under the Partner Integrations section.
3. Click the Conga Composer tab.
4. Select Composer Integration 2.0 (Recommended).

Caveats and Known Issues

 The Conga Orchestrate Product Team is aware of these issues and is actively working on a resolution to resolve them.

- You cannot send emails with Conga Email Templates when using the new Composer Endpoint (Composer Integration 2.0) in an Orchestrate Process.
- You cannot use QVar parameters when using the new Composer Endpoint (Composer Integration 2.0) in an Orchestrate Process.
- The QueryStringField parameter is not supported when using the new Composer Endpoint (Composer Integration 2.0) in an Orchestrate Process.
- If Composer documents are not being generated using the new Composer Endpoint 2.0, we recommend that you use Composer Endpoint 1.0 instead.

Create a Step that Posts to Chatter

You can leverage a Step within a Definition to automatically post content to Chatter. This Step Type allows you to post both static and dynamic text via Chatter on a specific record.

The Post to Chatter Step provides functionality to reference Salesforce merge fields to dynamically merge data specific to the record in use, such as Billing Address and Contact Name. This Step Type also allows you to mention specific users within the Chatter post.

Prior to creating a Post to Chat Step, ensure that the Chatter Feed feature is enabled for the referenced object in the Step. Enable Chatter Feed Tracking:

1. Navigate to Salesforce Setup.

2. In Setup, enter Feed Tracking in the Quick Find search box, then select Feed Tracking.
3. Select Enable Feed Tracking.
4. Click Save.

To create a Post to Chatter Step:

1. Navigate to the specific Definition record where the Step will be placed.
2. In the Steps section, click New Step. If you already have steps in a Definition, you can either use the New Child link next to the Step name in the Definition screen or you can use the New Child Step button while viewing the existing Step, located near the bottom of the screen. Click the button and change the Step Type to Send Email in the Step Edit screen.
3. Complete the fields:
 - Step Name - Enter the name for this step.
 - Step Type - Select Post to Chatter.
 - Parent Step - The Parent Step is the step that once completed, will initiate this new step. Leave it blank if this step needs to initiate immediately when the process starts.
 - Parent Stage - If a step has a Parent Stage, all of the Steps in the Parent Stage must complete before this Step creates.
 - Definition - This is automatically populated based on the Definition that the Step is created for.
 - Stage - Select the Stage with which this Step should be associated with, if applicable.
 - Chatter Notification Message - This field determines the information that is posted to Chatter
 - Merge Fields - Merge fields allow you to dynamically reference information from Salesforce fields that is specific to a record. Choose the Object and Field, then click Insert Field to Chatter Notification Message to insert merge fields into the Chatter post.
 - Use Salesforce merge fields that reference user IDs, such as `{!contract.OwnerId}`, in the Chatter Notification Message, to send a notification to a user dynamically. You can also hard-code a specific user ID in the Chatter Notification Message, such as `{0051H000008G23sKAC}`, to reference and notify the same user every time. This also works to notify Chatter Groups. For example, `{0F91H00000052hOSAQ}`.
 - Use Salesforce merge fields that reference Object IDs, such as `{!contract.id}`, to reference and create a hyperlink to a record. Hard-coding a record ID, similar to the example above, will hyperlink to the same record each time.

- Delay Creation - This will delay creating the Step until the day specified by the Delay Creation Base Date and Delay Creation Date Adjustment fields. See [Delayed Steps](#) for more information.
- Step Creation Conditions - Configure any [Step Creation Conditions](#) required.
- Click Save.

Creating a Step that Sends an Email

Conga Orchestrate has the ability to embed email alerts inside of your Conga Orchestrate Definitions. This allows you to easily send an email to internal and/or external people as an automated step within your processes. For example, you can notify people within your organization when a process has reached a certain point. You can notify your clients via email as well, such as a Welcome Aboard email at the end of an onboarding process or a Transfer Complete email when a transfer is complete.

Email steps cannot have child steps. If you need to create a step to follow up on the email, create the child step at the same level as the Send Email step.

1. Navigate to the Definition where you desire to place this step.
2. In the Steps section of the screen, click the New Email Alert button. If you already have steps in a Definition, you can either use the New Child link next to the Step name in the Definition screen or you can use the New Child Step button while viewing the existing Step, located near the bottom of the screen. Click the button and change the Step Type to Send Email in the Step Edit screen.
3. Complete the fields:
 - Step Name - Enter a name for the step. This field copies into the Subject when the process executes.
 - Step Type - Select Send Email.
 - Parent Step - Use Lookup to define the parent step, which is the step that must be completed before the Send Email step is initiated.
 - Leave the field blank if the Send Email step needs to be initiated as soon as the process starts.
 - Parent Stage - If a parent step is part of a Parent Stage, all of the steps in the stage must complete before the Send Email step is created.
 - Definition - The field is automatically populated based on the Definition.
 - Stage - Use Lookup to select the Stage to associate with the Send Email step, if applicable.
 - Email From (Sender) - Select the email address of the user sending the email alert, the person who initiated the process or completed the parent task, or an organization-wide email address defined in Salesforce.

- Email Recipients - Select the recipients for the email message, which can be individual users and the persons identified in a user or email field on the Account, Contact, or Process Object. In addition, Account team member and Team Member records can be recipients.
- Email Additional To - Enter the email address for each additional person you want to receive the message, making sure to separate email addresses using a semi-colon (;).
- Template Source - Select Salesforce, SendGrid, or Composer [Conga] to identify the source application for the template.
 - Salesforce - Select a HTML or text-based template in the Email Template list, and select the Email Template Contains ONLY User Fields checkbox if the selected template contains only merge fields from the user record. Email Templates can contain merge fields from the Account, Contact, Business Process, and User records. If you do not select the checkbox, you can still send the email to a user since this option controls how Salesforce merges data into the email template.
 - SendGrid - Select a SendGrid template in the SendGrid Email Template list. Click the Edit Template link to log in to Send Grid if you want to edit the template.
 - Composer - Select a Conga Composer template in the Composer Email Template list. These are Email Templates defined on the same object type as your Definition's Object Type. When this option is selected, the Email From (Sender) must be set to an org-wide email address.
- Delay Creation - Select the checkbox to define the conditions that must be met before the email is sent, or specify a certain date the email is sent. For example, use the Delay option to send an email reminder two days after a prior step is created, or use it as Marketing Automation lite to send emails on a schedule.
 - Populate the adjusted due date fields:
 - Send Date Adjustment Base Date - The date selected in this field will be used to calculate when the delayed email alert will be sent.
 - Parent Object - Calculation uses the Due Date Field on the object specified in the Object Name field for the Definition.
 - Current Date - Calculation is based on the current date. The current date is the date that the Send Step is created.
 - Parent Event - Calculation uses the Event date as the base date. This only applies if the current step is a child of an Event Placeholder Step.
 - Date Field - Calculation uses any Date or DateTime field from the Related Account, Contact, or Process Object selected.
 - Send Date Adjustment - This number will be added to the date specified in the Send Date Adjustment Base Date field.

4. Configure any needed [Step Creation Conditions](#).
5. Click Save.

Creating a Step to Update Records

The initial release of this functionality is in beta as we continue to build on its capabilities in future releases.

Update record(s) on associated records right from Conga Orchestrate.

Update Records steps cannot have child steps. If you need to create a step to follow up on the record update, create the child step at the same level as the Update Records step.

During process execution, you may need to refresh the page in order to see the updated field value.

To create an Update Records step:

1. Navigate to the [Definition](#) where you desire to place this step.
2. In the Steps section of the screen, click the New Step button or select the dropdown to the right and click Update Records. If you already have steps in the Definition, you can either use the New Child link next to the Step name while viewing the Definition or you can use the New Child Step button while viewing the existing Step (towards the bottom of the page). Then just change the Step Type to Update Records in the Step Edit page.
3. Complete the fields:
 - Step Name - Enter the name for this Step. This field copies into the Subject of a completed task when the step executes. Conga Orchestrate stores a completed task that shows which field(s) was updated as well as any errors if the field(s) wasn't updated for any reason.
 - Step Type - Select Update Records if it is not already selected.
 - Parent Step - The Parent Step is the step that once completed, will initiate this new step. Leave it blank if this step needs to initiate immediately when the process starts.
 - Parent Stage - If a step has a [Parent Stage](#), all of the Steps in the Parent Stage must complete before this Step creates.
 - Definition - This should be automatically populated based on the Definition you started from.
 - Stage - Select the Stage with which this Step should be associated, if applicable.
 - Create if Parent - This field indicates the status(es) that will permit the creation of this step. The Parent Step status must be set to one of these values for this step to create.

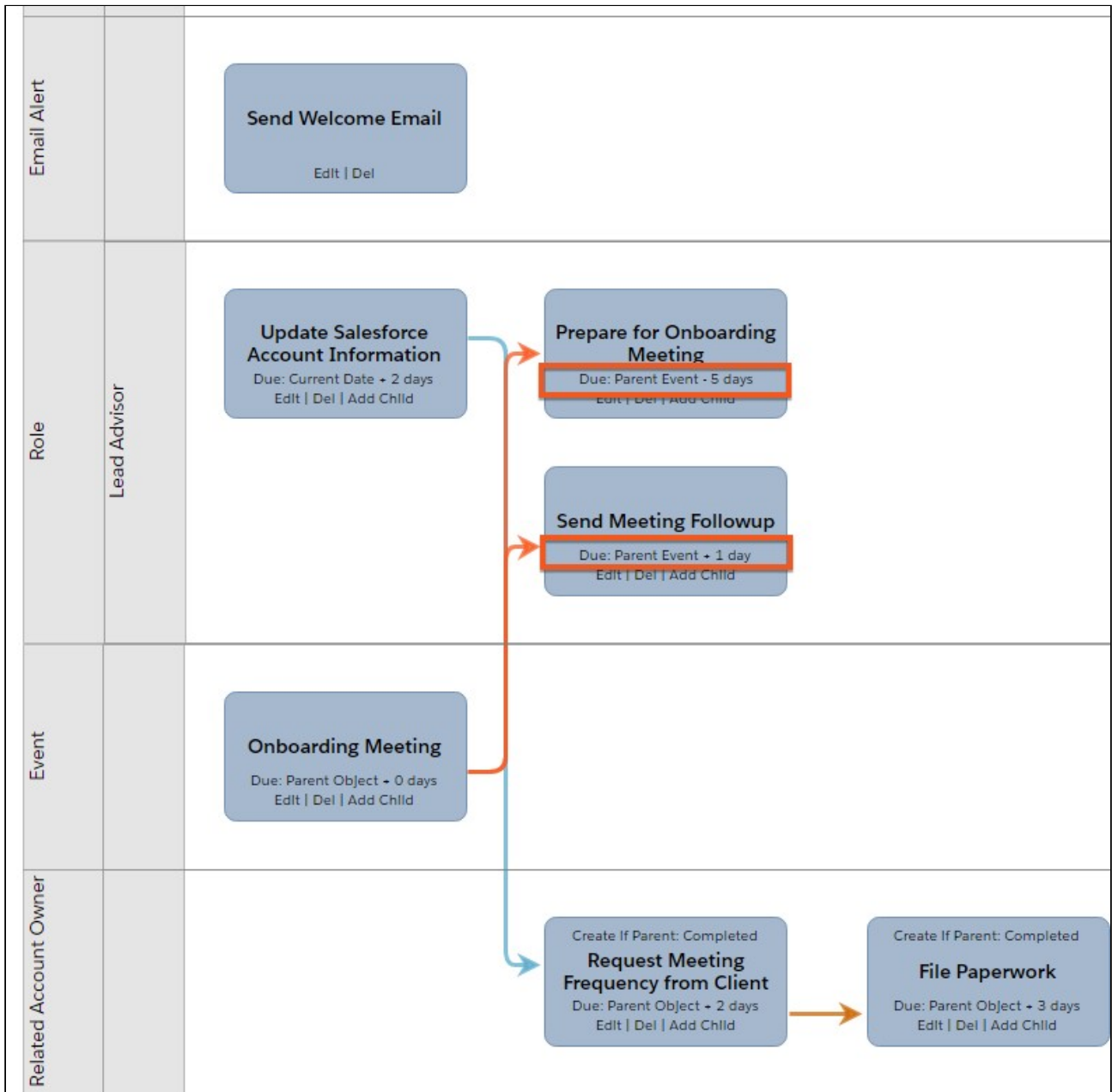
- Delay Creation - If checked, Conga Orchestrate will delay creating this step until the day specified by the Delay Creation Date Adjustment. See [Delayed Steps](#) for more information.
4. Configure any needed Step Creation Conditions. See [Step Creation Conditions](#) for more information.
 5. Configure the fields that should be updated when this step executes.
 - Select the + Add Record Update link (or the Create Step And Add Record Updates button, if it is a new Step).
 - Field to Update - Select the field to update. You can access fields of related objects by selecting a field with a > next to it.
 - Update Type - The Value option allows you to set a value explicitly. The Reference option allows you to dynamically set the new value-based on another related field.
 - Updated Value - This is the new value that will be stored in the field chosen in the Field to Update section. If the selected Update Type is Reference, you can access fields of related objects by selecting a field with a > next to it.
 - If applicable, populate the Date Adjustment field. This will only be available if the data type of the Field to Update is Date.
 - Select the Save button and then close the record update configuration pop-out.
 - Select the + Add Row link if additional record updates are needed.
 - Select the Save button in the Step Edit screen.

During process execution, you may need to refresh the page in order to see the updated field value.

Creating a Step with an Event Placeholder

As part of a process, an Event Placeholder waits for an Event with a matching Sub-Type to be created before child step(s) can begin. This step holds the place for the Event to occur in a process. Any child step from an Event Placeholder step can reference the Event date in its due date and due date adjustment.

For example, the screenshot below shows two steps that use Event Placeholder functionality. The Prepare for Onboarding Meeting task will be due five days prior to the meeting and the Send Meeting Followup task will be due the day after the meeting. These two tasks will be initiated when an event related to the process object record is created with the Onboarding Meeting subtype.



You can also have an entire process initiate when events are created. See Event Initiators for more information.

⚠ Important

You must check the Enable Event Placeholder Step checkbox field in the Setup Information section of the Conga Orchestrate Setup. This setting creates the sub_type__c field.

To create an Event Placeholder step:

1. Navigate to the Definition where you desire to place this step.
2. In the Steps section of the screen, click the New Event Placeholder button.

3. Complete the fields:
 - Step Name - Enter the name for this step.
 - Step Type - Select Event Placeholder.
 - Event SubType(s) - Select the Event Sub Type to associate with this Step. See [Creating Event Sub Types](#) to configure the subtypes needed for your Event Placeholders.
4. Click Save.

Creating a Step with an API Callout

Use the following instructions to create a Step that makes a callout to a RESTful API.

When an API Callout is made as part of a step and the callout does not succeed, the callout is placed in a queue and retried for 24 hours before failing.

1. Navigate to the Definition where you desire to place this step.
2. In the Steps section of the screen, click the API Callout button.

If you already have steps in the Definition, you can either use the New Child link next to the Step name while viewing the Definition or you can use the New Child Step button while viewing the existing Step (towards the bottom of the page). Then just change the Step Type to API Callout in the Step Edit page.

1. Complete the following fields:
 - Step Name - Enter the name for this Step. This field copies into the Subject when the process executes.
 - Step Type - Select API Callout.
 - Parent Step - The Parent Step is the step that once completed, will initiate this new step. Leave it blank if this step needs to initiate immediately when the process starts.
 - Parent Stage - If a step has a Parent Stage, all of the Steps in the Parent Stage must complete before this Step creates.
 - Definition - This should be automatically populated based on the Definition you started from.
 - Stage - Select the Stage with which this Step should be associated, if applicable.
 - Generate Step - Select to set up a task or custom object to generate when this callout occurs. The Step options display.
 - Perform Callout On - Select when the callout should be made such as when a Step object is Created, Updated, and / or Closed.
 - Merge Fields - Use to populate the static and dynamic query parameters in the API Callout URL field. Select Insert Field to URL or Insert Field to Request Body buttons to add your selections.

- API Callout URL - Select the static and dynamic query parameters (Merge Fields and Insert Field options) to populate the Uniform Resource Locator frame.

Ensure that your API Callout URL is setup as a Remote Site (Setup -> Security -> Remote Site Settings).

- API Callout Method - Select the HTTP verb to use for this callout. All standard callout verbs are available for use. The web service that you are calling specifies the verb to use for each method available in the service.
 - API Callout Headers - Enter any HTTP headers to include in the callout. Headers should follow the standard Header format with the Header Name and Value separated by a colon. If you include multiple Headers, separate them with semi-colons.
 - API Callout Body - Enter the Body to pass as part of the callout. When using the Body field, add a Content-Type header to the API Callout Headers field. For example, if you format the Body as a JSON string, add the Content-Type: text/json header to the Headers field. In addition, include merge fields in the Body field. Select the desired object and field then select the Insert Field to Request Body button to insert into the API Callout Body field.
 - Delay Creation - If checked, Conga Orchestrate will delay creating this step until the day specified by the Delay Creation Date Adjustment. See Delayed Steps for more information.
1. Configure any needed Step Creation Conditions. See Step Creation Conditions for more information.
 2. Select the Save button.

Creating a Step with Robotic Process Automation

Before you begin, you must [configure UiPath integration for Conga Orchestrate](#).

Note

You must be on Conga Orchestrate version 14 or greater to use this step type.

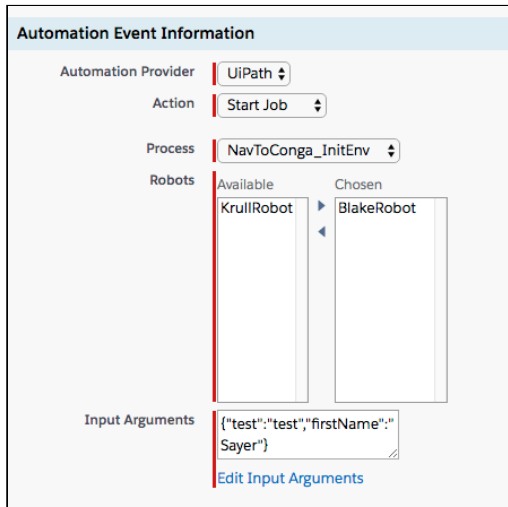
Create an Automation Step to leverage UiPath integration in a Process Definition.

In Salesforce orgs that upgrade to Conga Orchestrate version 14 or greater, you must run through the Object Setup in Conga Orchestrate Setup and configure the Task object, even if it is already configured.

To create an Automation Step in a Process Definition:

1. Navigate to a Definition record.
2. Click the New Step button.

3. Change the Step Type picklist field value to Automation.

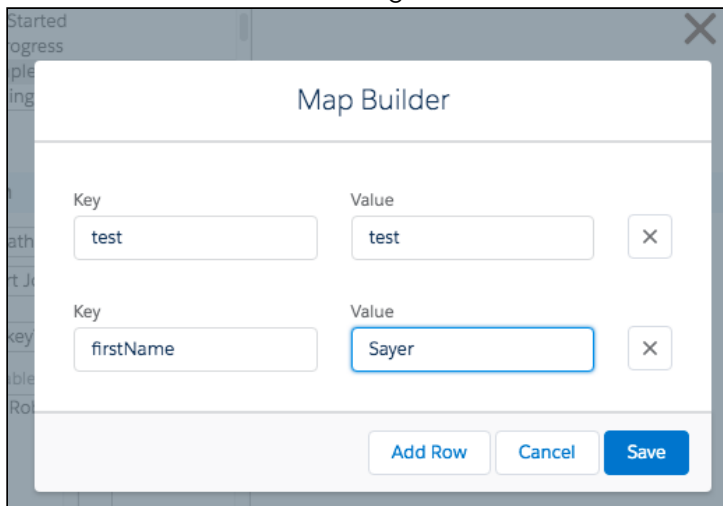


4. Select your Action.

- To start a job:
 - i. Change the Action picklist field value to Start Job.
 - ii. Change the Process picklist field value to the process you want to run.
 - iii. Highlight the robots to use for the job and move them from the Available column to the Chosen Column.
 - iv. Click the Edit Input Arguments link to add Input Parameters (name/value pairs to send to UiPath).

Note: Use static values, or include merge fields, for the Input Parameters. Example merge field syntax (assuming the process object is an Opportunity) {!Opportunity.Name}. Drilling up also works: {!Opportunity.Account.Name}

- v. Enter field values for the Key and Value fields.



- To Queue Data (add data to a Queue in UiPath):
 - i. Change the Action picklist field value to Queue Data.


- ii. Change the Queue picklist field value to the queue you want to add an item to.
 - iii. Change the Queue Priority picklist field value to reflect the processing priority of your item.
 - iv. Click the Edit Queue Datalink to add Input Parameters (name/value pairs to send to UiPath).
5. Enter a value in the Step Name field.
 6. Click Save.

For information on Executing an Automation Step, see [Executing an Automation Step](#).

Executing an Automation Step

Automation Steps are executed in the same way that other process steps are. Automation Steps can have parent steps, be child steps, or be top-level steps.


For information on setting up an Automation Step, see [Creating a Step with Process Automation](#).

 In Salesforce orgs that upgrade to Conga Orchestrate version 14 or greater, you must run through the Object Setup in Conga Orchestrate Setup and configure the Task object, even if it is already configured.

Troubleshooting Automation Steps

To log Automation Steps for debugging:

1. Navigate to Setup in Salesforce and use the Quick Find search box to located Custom Settings.
2. Click Manage hyperlink.
3. Click Edit and check the Enable RPA Logging checkbox field.

 When finished diagnosing an issue, make sure to uncheck the checkbox. Leaving the box checked will create unnecessary logging records in the org for any Automation Steps that are fired.

4. Recreate the issue where the Automation Step is not firing.
5. Navigate to the Reports tab.
6. Locate the Web Service Callout Errors Queue report.
7. Locate the record created when you fired the Automation Step.
8. Click into the record and locate the Web Service Callout URL.
9. Review the contents of the Web Service Callout Body field for information about the request.

⚠ When retrieving this information, follow the previous steps to uncheck the Enable RPA Logging on the Conga Orchestrate Settings custom setting.

Delayed Steps

Instead of creating a step as soon as a parent step is completed, a delay can be applied to postpone the creation of the step. For example, use a delayed email step to send an email reminder two days after a prior step is created, or as Marketing Automation lite to send emails on a schedule you specify.

When you select the Delay Creation checkbox on the Step edit screen, Conga Orchestrate will delay creating the step until the day specified by the Delay Creation Date Adjustment fields.

To create a step with a delay, select the Delay Creation checkbox and populate the adjusted due date fields:

- Delay Creation Base Date - The date selected in this field will be used to calculate when the delayed step will be created.
 - Parent Object - Creation date calculation uses the Due Date Field on the object specified in the Object Name field for the Definition.
 - Current Date - Creation date calculation will be based on the current date. Current date is the date that this Step is being created.
 - Parent Event - Creation date calculation uses the Event date as the base date for the calculation. This only applies if the current Step is a child of an Event Placeholder Step.
 - Date Field - Creation date calculation uses any Date / DateTime field from the Related Account, Contact, or Process Object you select.
 - Delay Creation Date Adjustment - This number will be added to the date specified in the Delay Creation Base Date field.
 - Delay Creation Time - The time selected in this field will determine the specific time the step is created on the designated Delay Creation Base Date. The Delay Creation fields do not control the due date of the step; they only control when the step will be created. Use the Due Date Adjustment Base Date and Due Date Adjustment fields to calculate the due date of the step.
- Delayed Steps in a Process

It is recommended that you add the Delayed Steps related list to any Process Object page layouts for processes that use Delayed Steps. When a process gets to the delayed step, a Delayed Step is created as a placeholder. Conga Orchestrate will monitor the Delayed Steps and create the step when the date matches the criteria you specified in the step. You

will be able to see the Delayed Steps on the Process Object record if you add the Delayed Steps related list to the page layout. We recommend adding these fields to the related list: Name, Step, Status, Type, and Date to Create.

If a Delayed Step is set to create on an event date, and the event is created with an event date of today, the Delayed Step will fire the task today because the batch job runs every hour. So, it will pick it up at most 60 minutes after the event queues it up.

Failed Delayed Steps

We also recommend that you schedule the Failed Delayed Steps report to run every day that will email a user in your org who can monitor any failed Delayed Steps. This report will only send out if there are any failed Delayed Steps.

Managing the Status of a Step with an Approval

When approval is used, the completion status of the step is controlled by the approval or rejection of an assigned user. If a user approves the step, the step status is set to the status selected in the Approval Status field. If a user rejects the step, the step status is set to the status selected in the Rejection Status field. Approvals are only available for the Create Record step type.

During process execution, the approval appears on the generated step's (i.e. Task) view screen. You do not edit the record to access the approval item. The record's Status will automatically change to the appropriate value when the approval item is completed.


The record locking behavior described below is present when managing the status of a step with approval.

- Process objects: editing of the record is limited to approvers and administrators. If there are multiple approval steps outstanding, any of the approvers will be able to edit.
- Steps: Editing the status field is blocked since it is managed by the Orchestrate approval.

To create Approval:

1. Create or edit a step with a step type of Create Record.
2. Select Approval in the Status Managed By field.
3. In the Step Approval Items section, set the Approval Status field to the status you wish the step to be set to upon step approval. This list is populated with [Closed Status Values](#).
4. Set the Rejection Status to the status you wish the step to be set to upon step approval. This list is populated with [Closed Status Values](#).

5. Set the Rejection Action to Continue if you wish for the step to follow a different path in the event of a rejection; set it to *Stop Process* if you wish for the process to stop upon rejection of the step. Choose Go Back to loop the process back to a prior Step or Stage; the lookups (Step and Stage) will appear when this option is selected and one or the other is required to be populated when choosing this option.

 You may wish to reassign the generated step to another approver. The current (assigned) approver, their manager, or a system administrator can reassign the step.

6. Click Save.

 **Note**

If you have configured a custom object as a step, a new custom lookup relationship field will need to be added to your custom object that looks up to the Approval object. The API name of the field needs to be approval__c. Also, in order to view the approval items on a custom object's page layout in Classic, a Visualforce page will need to be created and added to the page layout.

Add Approvals Lightning Component

If you customized your Task page layouts or Process Task page layouts in the Lightning App Builder, you will need to manually add the Approval Item Lightning component to your Lightning Pages.

You can also add a Lightning Component to your Process Object to manage all related Approvals. For more information, see [Use a Lightning Component to Manage Approvals for a Process Object](#).

Managing the Status of a Step with a Checklist

Checklists are only available for the Create Record step type. When a checklist is used, the completion status of the step is defined by the checklist. Once all the checklist items are complete, the step is considered complete.

Once created and configured in a Step, the checklist items appear in a list on the Step Detail screen.

During process execution, the checklist appears on the Task Detail screen. You do not have to edit the task to access the checklist items. The status of the task automatically changes to *Completed* when all of the checklist items are completed.

To create a Checklist:

1. Create or edit a step with a step type of [Create Record](#).
2. Select Checklist in the Status Managed By field.
3. In the Step Checklist Items section, select the + Add Checklist Item link to add a checklist item.
 - Label the checklist item by typing in the Item field.
 - Use the Order field to number the checklist items.
4. Use the trash can icon to delete any checklist items you wish to remove from the list.
5. Click the Save button.

If you have configured a [custom object as a step](#), a new custom lookup relationship field will need to be added to your custom object that looks up to the Checklist object. The API name of the field needs to be `checklist__c`. Also, in order to view the checklist items on a custom object's page layout in Classic, a Visualforce page will need to be created and added to the page layout.

Add Checklists Lightning Component

If you customized your Task page layouts or Process Task page layouts in the Lightning App Builder, you will need to manually add the Checklist Lightning component to your Lightning Pages.

Step Creation Conditions

In general, a new Step starts when the Step before it completes. It often makes sense to create additional conditions to determine when a Step should create. For this, use Step Creation Conditions. These are criteria that must equal 'True' in order for the Step to create.

In general, a new Step starts when the Step before it completes. It often makes sense to create additional conditions to determine when a Step should create. For this, use Step Creation Conditions. These are criteria that must equal True in order for the Step to create.

Note: The following fields are supported in Step Creation Conditions: Boolean, Combobox, Currency, Double, Email, Integer, Percent, Phone, Picklist, String, Textarea, URL, MultiPicklist, and User lookup fields.

Refer to [Creating a Definition](#) and [Steps](#) before creating Step Creation Conditions.

1. Navigate to the Step in which you want to add the condition.
2. Select the Edit button.

3. Scroll down to the Step Creation Conditions section.
4. Select the + Add Creation Condition link.
5. Configure the fields.
 - Object Select- Select the specified process object defined on the definition or the immediate parent to this step. This list is dynamically populated based on the process object and parent step.
 - Field Select - Select the field to which this step should be dependent. This list is dynamically populated based on the Object Name chosen.
 - Operator - Select how the Field Name compares to the Field Value field.
 - Field Value - Enter the Field Value or select the Field Value from the drop-down list box depending on the Field Name you select.
 - Data Type - Displays the data type of the selected Field Name. This field auto-populates. Note: Auto number, date, datetime, geolocation, and time fields are not supported.
6. Select the + Add Row link to add more criteria, if needed.
7. Scroll up and select the Save button.

[Watch this video for more information.](#)

 **Note**

For more information on advanced functionality with Step Creation Conditions, see [Advanced Functionality with Step Creation Conditions](#).

Step Field Validations

Use Step Field Validations on your steps to prevent the step's completion when the configured validation rules return true. Rather than setting up object-specific validation rules in an attempt to control needed data for Conga Orchestrate steps, define validations directly on the Step level inside of Conga Orchestrate and make sure all of the data you expect is there and conditions are met before moving on to the next step in the process.

Refer to Creating a [Definition](#) and [Steps](#) before creating Step Field Validations.

1. Navigate to the Step in which you want to add the validation.
2. Select the Edit button.
3. Scroll down to the Step Field Validations section.
4. Select the + Add Field Validation link.
5. Configure the fields.
 - Field Validation Message - Input the message a user should receive when completing a task that doesn't meet the configured validation criteria.

- Object Name - Select the specified process object defined on the definition or select Task. This list is dynamically populated based on the process object.
 - Field Name - Select the field to which this step should be validated. This list is dynamically populated based on the Object Name chosen.
 - Operator - Select how the Field Name compares to the Field Value field.
 - Field Value - Enter the Field Value or select the Field Value from the drop-down list box depending on the Field Name you select. If the field value in your rule is to be blank, leave this field blank, or type in NULL as shown in the screen shot above.
 - Data Type - Displays the data type of the selected Field Name. This field auto-populates. Note: Auto number, date, datetime, geolocation, and time fields are not supported.
6. Select the + Add Row link to add more criteria, if needed.
 7. Scroll up and select the Save button.

About Process Steps

A Step is an individual step in a process. Collectively, these steps drive the process to completion. At each step, you define what happens (create a record, send an email, or generate a document), who is responsible, and when it is due. Each step is related to one [Process Definition](#).

A Step can be one of several types:

- [Create Record](#)
- [Send Email](#)
- [Generate Document](#)
- [Event Placeholder](#)
- [Record Update](#)
- [API Callout](#)
- [Post to Chatter](#)

As you choose the various Step Types in the picklist, the Step Edit page will update to show the applicable, editable fields for the chosen type.

The following additional options can be added to a Create Record step to manage status:

- [Manage Status of a Step with a Checklist](#)
- [Manage Status of a Step with an Approval](#)

The following information relates to steps:

- [Delayed Steps](#) - Delay the creation of the step
- [Assignee Types](#) - Multiple options to dynamically assign steps.
- [Creation Conditions](#) - Conditionally create steps based on conditions you set.

- [Field Validations](#) - Prevent a process from continuing until the conditions you specify are met.

Process Tasks vs. Tasks (Salesforce Activity)

This table lists the differences between native Salesforce Tasks and Process Tasks (custom task objects created by Conga Orchestrate).

	Process Task or Custom Object Step	Standard Task (Activity)
Track metrics for completion	Yes	Yes
Available for complex Business processes	Yes	Yes
Trigger the launch of the next task in a business process	Yes	Yes
Custom field limit	500	100
Formula fields	Yes	Limited
Additional long text area fields	Yes	No
Additional Rich Text Fields	Yes	No
Roll up summary fields	Yes	No
Available in Queues	Yes	Yes
Show as Open Activities	No	Yes
Show in Activity History	No	Yes
Archived after 1 year	No	Yes

Running Processes

There is a process that you can run in Salesforce with Conga Orchestrate. For more information, see the topics in this section.

- [Manually Initiate a Process](#)
- [Automatically Initiate a Process](#)
- [About Definition Initiators](#)
- [Creating a Definition Initiator](#)
- [Record Match Initiators - Button Click](#)
- [Record Match Initiators - Daily Check](#)
- [Event Initiators](#)
- [Recurring Business Processes Overview](#)
- [Starting a Recurring Business Process](#)

Manually Initiate a Process

Once you have defined your process with a Definition and marked it Active, you can use it with records in Salesforce. Because you can utilize other objects as Process Objects, initiating a process will depend on the Definition configuration. Conga Orchestrate comes with a custom Process Object called Business Process. The sections below describe manually initiating your Definition which includes Business Process in the configured Object Name field.

Once you have defined your process with a Definition and marked it Active, you can use it with records in Salesforce. Because you can utilize other objects as Process Objects, initiating a process will depend on the Definition configuration. Conga Orchestrate comes with a custom Process Object called Business Process. The sections below describe manually initiating your Definition which includes Business Process in the configured Object Name field.

To run a single Business Process:

1. Navigate to the Contact record to which you want to start a process.
2. Navigate to the Business Process related list.
3. Select the New button.
4. Select the Record Type to which your process applies and select the Continue button.
5. Enter the required fields. The subject uniquely identifies this process among others like it that may be running. Due Date indicates when the Business Process should be completed. Other fields automatically populate upon save if not configured.

6. Select Save.

After saving, the Business Process Detail page displays. If the Business Process you started was configured to create a Task immediately, it will be visible under Activities or Next Steps.

Once all the steps in a process are either completed or canceled, the Business Process Status field will automatically update. If the steps are completed, the Business Process status will be updated to Completed. If the steps are canceled, the Business Process Status will be updated to Canceled. The Completed By and Completed Date fields will also be automatically populated.

To run a single process defined for another process object (Campaign, Case, Contract, Lead, Opportunity, or your own custom object):

1. Navigate to the Contact record to which you want to start a process.
2. Navigate to the related list of the process object.
3. Select the New button.
4. Select the Record Type to which your process applies and select the Continue button.
5. Enter the required fields.
6. Select Save.

After saving, the Process Object detail page displays. If the process you started was configured to create a Task immediately, it will be visible under Activities or Next Steps.

A process will be considered finished when all the tasks are either completed or canceled.

Automatically Initiate a Process

Once you have defined your process in a Definition, you can use that process with your Salesforce records. The sections below describe automatically initiating your defined processes.

Automatically initiate processes:

- [Using Definition Initiators](#)
- [Using Recurring Business Processes](#)

About Definition Initiators

Definition Initiators allow you to take process execution to the next level. When setting up an Initiator, you simply tell Conga Orchestrate what Object (Account, Contact, or Event) and what Operations (Insert and/or Update) on that Object you desire to monitor. Additionally, you provide rules (Criteria) about when the Initiator should run based on the

Definition you select. Finally, you provide the information (Assignment, Due Date, custom / standard field settings) that you want the initiated process to contain. Conga Orchestrate waits and initiates your process when all Definition Initiators criteria is met.

For example, you can initiate a Client Onboarding process when an Account's Type field changes from Prospect to Client, or you can create a Definition Initiator that starts an Address Change process when the address is updated on the Contact or Account.

Definition Initiators perform in a specific manner:

- If your Initiator is monitoring updates (i.e. Account Updates), Conga Orchestrate only initiates a process the first time the fields specified in your criteria are modified and match the Initiator. Subsequent updates to the record that match the Initiator, will not run additional processes unless the fields are modified again.
- Definition Initiators have an Operator in the Criteria called "Is Changed". If you select this Operator for your Criteria item, Conga Orchestrate verifies if the field value changes and evaluates the criteria to see if it is true. This enables you to initiate a process if a field, or series of fields, changes regardless of what they were changed.
- If you are creating a Definition Initiator to monitor the Contact Object, you can create criteria that evaluate fields from the Contact and Account Objects. This allows you to be very specific when initiating processes from Contact record changes by joining information from its related Account. To gain maximum visibility within Salesforce, relate all processes to an Account or Contact.
- If you are creating a Definition Initiator to monitor the Events, create the events using a Contact specified in the Name field on the Event. This ensures that the process that is initiated is associated with the correct Contact and Account.
- Definition Initiators automatically attempt to select an associated Contact record when they initiate a process. To do so, Conga Orchestrate initially looks for the following (in this order):
 - A specified Contact Lookup field on the monitored Account. Create a custom Contact Lookup field on the Account object, edit the [Conga Orchestrate Setup](#) setting labeled "Initiator Custom Object - Contact Field" and "Initiator Custom Objects" as shown in the screenshot, and populate the new Contact Lookup field on all Account records.
 - [Contact Roles](#) related to the monitored Account. If a Contact is specified in a Contact role and is set as Primary, it is used first.
 - If neither Contact Roles nor a specific Contact Lookup has been configured on the monitored Account, Conga Orchestrate queries all related Contacts alphabetically, based on the full name, and selects the first one returned.
 - If there are no Contacts related to the monitored Account, the Contact field is left blank on the initiated process.
 - If using a [Custom Object as the monitored object](#) on the initiator, Create a custom Contact Lookup field on the Custom Object, edit the [Conga Orchestrate](#)

[Setup](#) labeled "Initiator Custom Object - Contact Field" and "Initiator Custom Objects", and populate the new Contact Lookup field on all records.

Creating a Definition Initiator

This section details how to create Definition Initiators. To create a Definition Initiator:

1. Navigate to the Definition Initiators tab.
2. Select the New button.
3. Enter the Definition Initiator Name.
4. Select the Active checkbox to make this initiator active.
5. Select Search to choose the type of Definition to Initiate.
6. Select the Object you desire to monitor from the Monitored Object list.

Configure a custom trigger to add a Custom Object to the Initiator's Monitored Object list.

1. Select the Monitored Operation(s) that cause(s) the Definition to initiate. Hold the Ctrl key on your keyboard to select multiple Monitored Operations, if applicable.
 - Update - When the Monitored Object's record is updated to meet the criteria, the process will initiate.
 - Insert - When the Monitored Object's record is created and meets criteria, the process will initiate.
 - Record Matches Criteria - Button Click - After you have configured and saved the Definition Initiator with a Monitored Operation of Record Matches Criteria - Button Click, you will see a button labeled Initiate Process on Matching Records. Once clicked, a process will initiate for each record that matches criteria based on the parameters and fields defined in the Definition Initiator. See Record Match Initiators - Button Click to see it in action.
 - Record Matches Criteria - Daily Check - After you have configured and saved the Definition Initiator with a Monitored Operation of Record Matches Criteria - Daily Check, a batch job will check daily to find records that match the criteria defined in the Definition Initiator. See Record Match Initiators - Daily Check to see it in action. Navigate to the Conga Orchestrate Setup Tab to auto-schedule the batch job.
2. Select the + Add Criteria to link to provide rules about when the Initiator should run.
 - The Object Name defaults to the Monitored Object.
 - Select the Field Name that you desire to qualify. This field changes depending on the chosen Object Name.
 - Select the type of Operator to compare the value against.
 - Select the Field Value to compare the value against.

- The Data Type automatically displays the data type of the chosen Field Name.
 - Select a Joining Operator. Only applicable if there are multiple criteria for the definition. Note: The Joining Operator field indicates how this value is combined with the other values. Conga Orchestrate combines the OR operators first and then the AND operators for a final AND operation. Logically, this would look like: Criteria1 AND Criteria2 AND Criteria3 AND (Criteria4 OR Criteria5 OR Criteria6) if there were 6 criteria and 1 through 3 had a joining operator of AND and 4 through 6 had a joining operator of OR.
3. Select + Add Row to include additional criteria.
 4. Select an Assignee Type in the Assign Process Object By drop down field.
 5. Select the Process Object Owner based on your selection in the Assign Process Object By field.
 6. Enter a positive number in the Due Date Adjustment field to add a certain number of days to the date the process initiates. This will dynamically calculate the date in which the process is due.
 7. Enter a Description detailing what this Definition Initiator does.
 8. Select the Owner of this Definition Initiator.
 9. Populate any necessary information in the Capture Process Information section.
 10. Select the Save button.

See [this video](#) for more in-depth information on creating Definition Initiators.

Record Match Initiators - Button Click

After you have configured and saved the [Definition Initiator](#), you will see a button labeled Initiate Process on Matching Records. Once clicked, a process will initiate for each record that matches criteria based on the parameters and fields defined in the Definition Initiator and related Definition. Watch [the video](#) to see it in action.

Record Match Initiators - Daily Check

After you have configured and saved the [Definition Initiator](#) with a Monitored Operation of Record Matches Criteria - Daily Check, a batch job will check daily to find records that match the criteria outlined in the Definition Initiator and will subsequently initiate the process defined in the matching [Definition](#). Watch the video below to see it in action.

If you haven't already done so, navigate to the [Conga Orchestrate Setup](#) Tab to auto-schedule the batch job.

[Watch a video here.](#)

Event Initiators

After you have configured and saved the [Definition Initiator](#) with a Monitored Object of Event, a process will initiate for each event created that matches the criteria of a Definition Initiator. Watch [the video](#) to see it in action.

Note

When creating the event, be sure to populate the Name field with the related Contact.

Recurring Business Processes Overview

This section configures your Salesforce installation to support Recurring Business Processes. Recurring Business Processes allow you to execute any process you define in Conga Orchestrate (Definition) on a recurring basis. They hold information on how often the process scheduled to start or begin, who it should be assigned to, and how its Due Date should be set. In addition, the Recurring Business Process record captures and stores information that will be inserted into the process when it is time for it to run. You configure an Apex Batch Job to execute each night and start any processes that are due to generate.

Recurring Business Processes have two different mechanisms for calculating when the process should execute next. These mechanisms are referred to as the Recurrence Type.

You can configure the Recurrence Type to either:

- Created Date.
- Completed Date.

When a process starts and the Recurrence Type is set to Created Date, Conga Orchestrate simply adds the specified Interval and Interval Number to the current date to determine the next occurrence. If the Recurrence Type is set to Completed Date, Conga Orchestrate leaves the next occurrence blank. When the process that was started completes, Conga Orchestrate updates the next occurrence of the related Recurring Business Process by adding the specified Interval and Interval Number to the completed date.

A Recurrence Type of Completed Date is useful when you have a process that needs to have a consistent interval between occurrences but have a large amount of time to complete the process. For example, common usage of this is a Scheduling process. You may want to schedule meetings with a specific amount of time between meetings, but it may take some time to get the meeting scheduled.

A Recurrence Type of Created Date is a more common type of Recurring Business Process. This is very useful for a process that needs to execute on a set schedule regardless of how long it takes to complete the previous occurrence.

To create Recurring Business Processes, you must have at least one Definition defined. After you define a definition, navigate to a Contact in the system and select the New button from the Recurring Business Process Related List. Fill out the required and desired information and select Save.

If the Begin Date is set to the current date, the first occurrence begins immediately. Otherwise, the process starts on the Next Scheduled Occurrence date.

You can configure Recurring Business Processes to have a specific End Date or No End Date. If No End Date is selected, the process executes according to its Interval forever. If an End Date is specified, the process executes according to its Interval until the End Date has passed. There is no limit to how many Recurring Business Processes you can define in the system.

[Watch this video for more information.](#)

Starting a Recurring Business Process

Recurring Business Processes allow you to execute any defined process ([Definition](#)) on a recurring basis. They hold information on how often the process is supposed to start, who it should be assigned to, and how its Due Date should be set. Like a single Business Process, you can use Recurring Business Processes with Accounts and Contacts. Refer to [Recurring Business Processes Overview](#) for more information.

To set up a Recurring Business Process:

The fields in the Capture Object Information section populate dynamically depending on the field values you select in the Object Type to Create and Record Type to Create fields from the Recurring Process Settings section. Required fields are marked and other fields are optional. If the selected Record Type references a Conga Orchestrate-managed object, the values in these fields are used by the Recurring Business Process to initiate a Single Business Process at the Interval over the time period you have specified.

1. Navigate to the Contact for which you would like to associate a new Recurring Business Process.
2. Select the New Recurring Business Process button from the Recurring Business Process Related List. See [Editing Contact Page Layouts for Business Processes](#) if the Recurring Business Process Related List is not shown on the page layout.
3. Type your desired Recurring Business Process Name.
4. Choose the applicable object in the Object Type To Create picklist.

5. Select the associated Record Type in the Record Type to Create field.
6. The Contact and Account fields will auto-populate.
7. Configure the Recurrence Type as Completed Date or Created Date. This is most commonly set to Created Date. Refer to Recurring Business Processes Overview for an explanation of the Created Date and Completed Date picklist values.
8. Set the Begin Date for the recurrence. If the Begin Date is set to the current date, the first occurrence begins immediately. Otherwise, the process starts on the Next Scheduled Occurrence date.
9. Set an End Date for the recurrence. (If you do not select the No End Date checkbox, the process executes according to its Interval forever. If you select an End Date, the process executes according to its Interval until the End Date passes.
10. Select the Interval for which you would like this process to recur - Year, Quarter, Month, Week, or Day.
11. Set the Interval Number which allows you to further customize the Interval. For example, if 'Week' is selected in the Interval picklist and Interval Number is set to '2', this process would recur every two weeks.
12. Select how to assign the process with the Assign Process Object by field.
13. Select the associated owner in the Process Object Owner field.
14. Set the Due Date Adjustment (default is 0 days). This field tells the system how to adjust the Due Date of the Business Process that will create. This can be longer (greater than 0), shorter (less than 0), or the same (0) as the Business Process created date. For example, if your Business Process is set to create on the 1st of each month and the Due Date Adjustment is '2', the Due Date of the process will be set to the 3rd day of the month.
15. Enter the Subject field to uniquely identify this process when it runs.
16. Select Save.
17. On the Recurring Process Information screen, verify your settings. If the time period you have specified includes the current date, a newly-created Business Process displays under the 'Business Process' list. Over the time period you have specified, a new Business Process will be created at each Interval you set.

Orchestrate Features by Release

Review the latest Conga Orchestrate Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of Conga Composer. For more information, see [Conga Orchestrate Features by Release](#).

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