conga

Courier

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On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

Conga Courier® extends standard Salesforce® report delivery, giving customers the ability to automatically email an unlimited number of individual reports to people inside and outside of their organization. Schedule a Salesforce report once and Conga Courier will automatically send your recipients the information when they need it.

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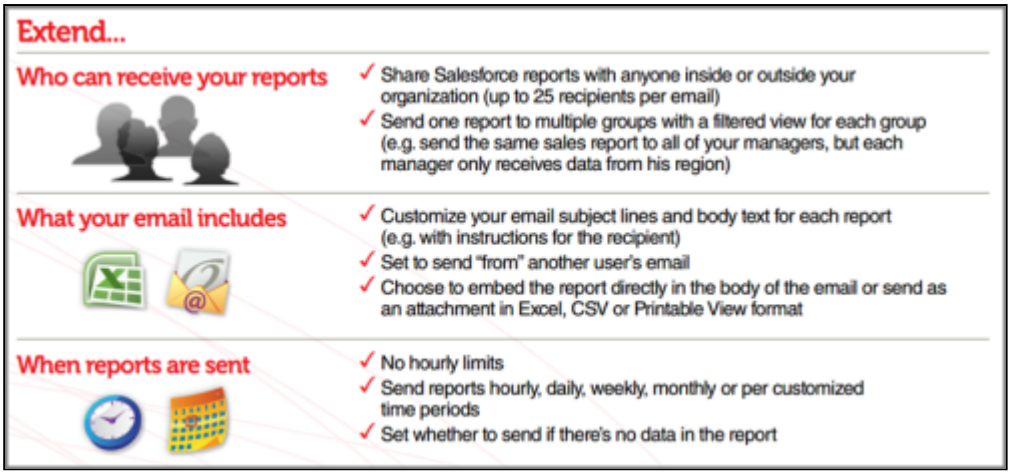
About Conga Courier

> On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

Conga Courier® lets you go beyond simple Salesforce® report delivery to automatically send an unlimited number of individual, custom-defined report emails to people inside and outside of your organization.



Reports are queued 15 minutes before the top of the hour.

Reports are delivered at the top of the hour.

Conga Courier is a service comprised of multiple processes, including scheduling, report generation, emailing, and activity logging. Performing these processes separately allows for the maximum allocation of resources to the actual generation and emailing of reports.

The 15 minutes prior to the top of the hour (for example, the time between 7:45 am and 8:00 am) is reserved for the queuing process, during which Conga Courier will inspect your Salesforce instance to identify any scheduled reports and the desired recipients. Changes made to schedules during this period may not take effect until the next scheduled execution of the report.

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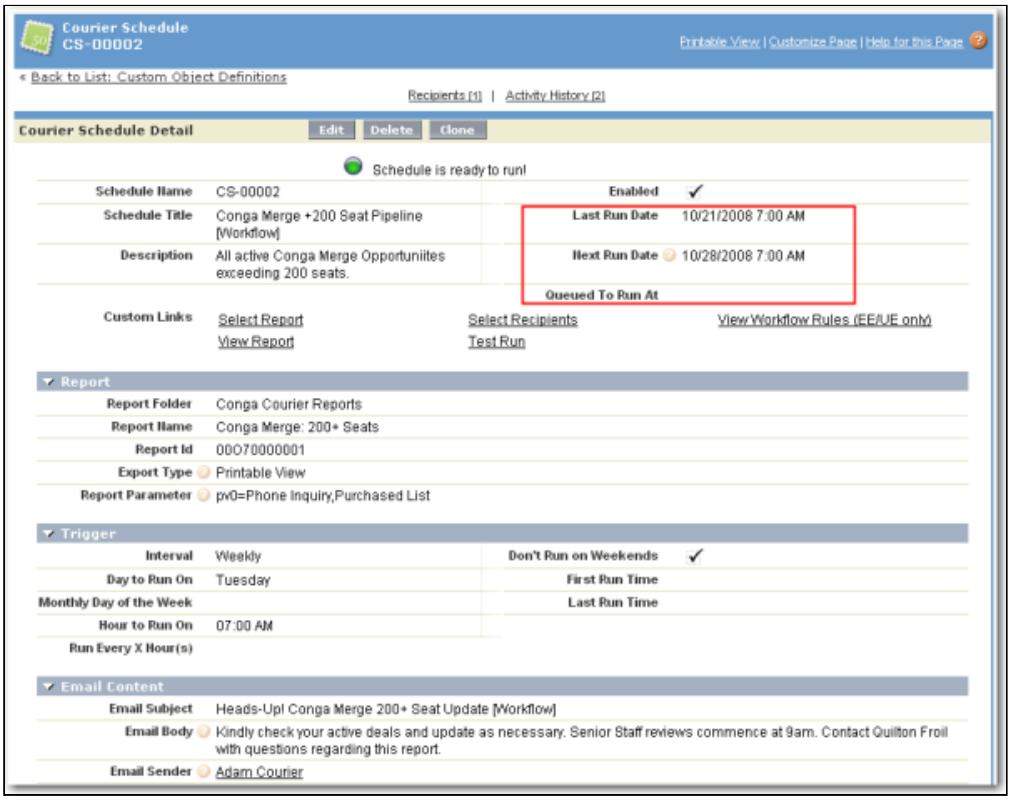

During this period, all Conga Courier Schedule records will be updated to reflect the next scheduled Run Date.

All reports are scheduled to be generated and emailed starting at the top of the hour. Depending on the number of customers with reports scheduled at a given time, the size of reports, and the number of recipients, the delivery of reports may be delayed by some minutes. Conga strives for the timely generation and sending of reports through constant monitoring of its systems and the deployment of additional system resources as it deems necessary to ensure reasonably timely delivery.

Single sign-on is not supported in Courier.

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Courier Product Guide

On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

Learn Conga Courier Basics

- About Conga Courier
- Courier Product Data Limits

Install Conga Courier

- Install and Deploy Conga Courier

Configure Conga Courier

- Configure Conga Courier for Your Organization

Use Conga Courier

- Courier Schedules: Basic Settings
- Select a Report for the Conga Courier Schedule
- Test Run a Conga Courier Schedule
- Select Recipients for a Conga Courier Schedule
- Advanced Configuration for Enterprise and Performance (Unlimited) Editions
- Activity Logging
- Monitoring Conga Courier Utilization
- Upgrading from a Previous Version of Conga Courier

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Install and Deploy Conga Courier

> On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

You can find the Conga Courier® app from the Salesforce® AppExchange. Follow the instructions below to download and install Conga Courier into your production Salesforce instance or sandbox.

To install Conga Courier:

1. Click the appropriate link to install Conga Courier in your Salesforce environment.
2. Log in to the AppExchange using your Salesforce credentials.
3. Select the appropriate option, depending on whether you wish to install Conga Courier in your production or sandbox instance of Salesforce.
4. Read and agree to the terms and conditions, then click Install!
5. Enter your Salesforce Username and Password (for the instance in which you're installing – production or sandbox)
6. Choose a security level. For most installations, the Salesforce system administrator is the only one who requires access to the application. You can expand access, if desired, to other authorized users at a later date.
7. Click Install.

Installation is complete.

To get started, click the app menu and choose Conga Courier. See Configure Conga Courier for Your Organization for next steps.

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Configure Courier as a Connected App

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Administrators can pre-approve users to connect through OAuth when running solutions. This method masks the session ID and URL when using Visualforce® buttons, and prevents pop-up authorization requests when running Courier.

To configure Conga Courier as a connected app to use OAuth:

1. Navigate to Setup
2. Manage Apps
3. Connected Apps
4. Conga Courier.
5. Click Edit.
6. Change the Permitted Users picklist to Admin approved users are pre-authorized.

   > Administrators must be pre-approved in the Connected App. If not, you might see an error message when trying to access the Conga Courier Setup page.

7. Designate which users connect to Conga Courier through OAuth b adding profiles. Click Manage Profiles or Manage Permission Sets.

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Configure Conga Courier for Your Organization

> On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

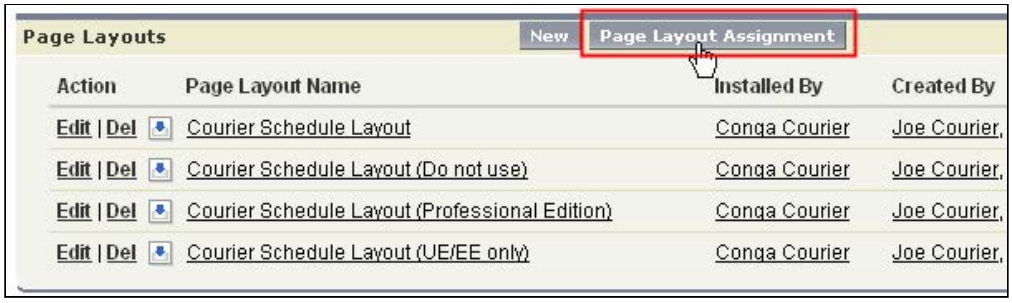
Conga Courier® must be configured as a Connected App when using Salesforce Lightning. See Configure Courier as a Connected App for more information.

After the installation completes, you can establish the active Page Layout for the Schedule object and define the authority where Conga Courier® runs.

Set the Active Page Layout

To set the active Page Layout for the Schedules object:

1. Select Setup > Create > Objects.
2. Click Courier Schedule.
3. Scroll to the Page Layouts section.
4. Click Page Layout Assignment and then click Edit Assignment.



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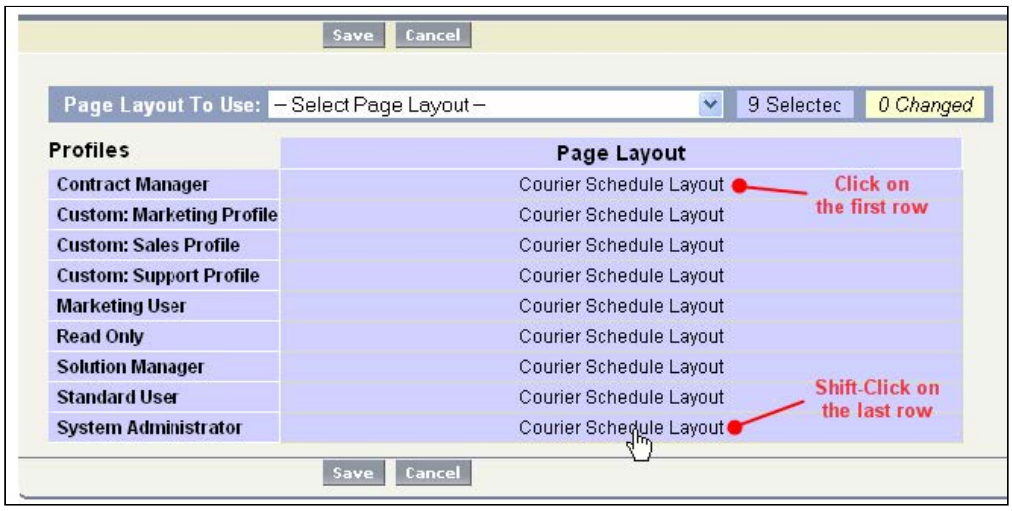
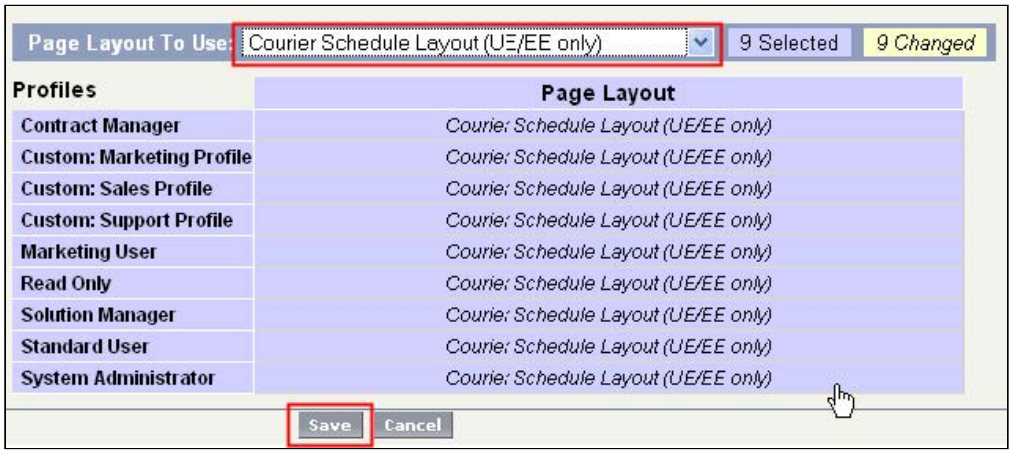
5. Click the first row under the Page Layout header, then shift-click on the last row to select all rows.



6. If you have Unlimited or Enterprise Edition, for the Page Layout to Use field, select Courier Schedule Layout (UE/EE only).



Or

If you have Professional Edition, for the Page Layout to Use field, select Courier Schedule Layout (Professional Edition).

1. Click Save.

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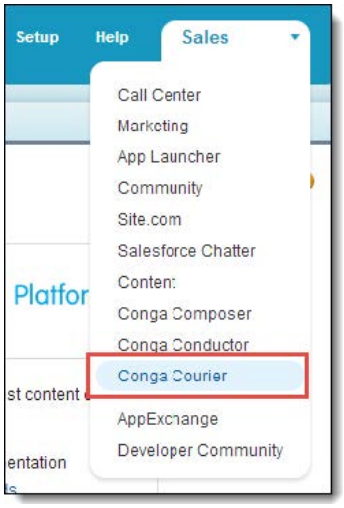
Conga Courier Setup

To setup Conga Courier

1. Select Conga Courier from the app menu, and then click the Courier Setup tab.



2. Follow the directions on the Setup page.

> a. Select the Courier Master Switch check box. This is required for Courier to run.

3. Also, you MUST enter the IP Addresses of our data centers into the Network Access permissions for Courier to operate. If you have your own security software, you must whitelist these IP addresses in the security software itself. You enter these static IP addresses in Salesforce Setup: Setup → Security Controls → Network AccessYou must contact support to get the IP Addresses of our data centers.
4. In the Credentials area:
    a. In the Username box, enter the username of a user authorized with read/write access to Courier schedules and write access to Tasks (for the Enterprise or Unlimited Salesforce editions) or System Administration access for Salesforce Professional Edition.
    b. In the Password box, enter the user's password.
    c. In the Security Token box, enter the user's security token, as provided by Salesforce. To request a Salesforce Security Token, navigate to My Settings → Personal → Reset My Security Token.

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> Generally, the user must have access to the report folders, reports, and data you expect the emailed reports to include. Anything the user account cannot access will not be available for scheduled reporting.

5. In the Email Footer area, type text that will be included at the end of each sent email. You may use HTML/CSS to control formatting as bullets
6. Click Save.

You must enable Run Reports and Export Reports on the Profiles for the user(s) under whose authority reports are executed. Note that Administrators must also have API Enabled on their Profile.

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Courier Product Data Limits

On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

Conga Courier relies, like you, on the Salesforce Report service to generate reports for emailing. If for any reason this service is off-line at the time a report is scheduled to be run by Conga Courier, the report will not be run and an appropriate error message will be logged with the Courier Schedule. Conga accepts no liability for any such failure of the Salesforce service.

Conga Courier Limits

Maximum file attachment size	5MB
Maximum file attachment size for Report-Based Recipients	1MB
Maximum number of Contacts as Report-Based Recipients	500
Maximum Contacts per Schedule	25
Maximum Users per Schedule	No limit

Salesforce Character Encoding is limited to UTF-8.

Joined and Matrix reports are not supported in Courier.

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Transitioning from Courier to a Composer and Batch Solution

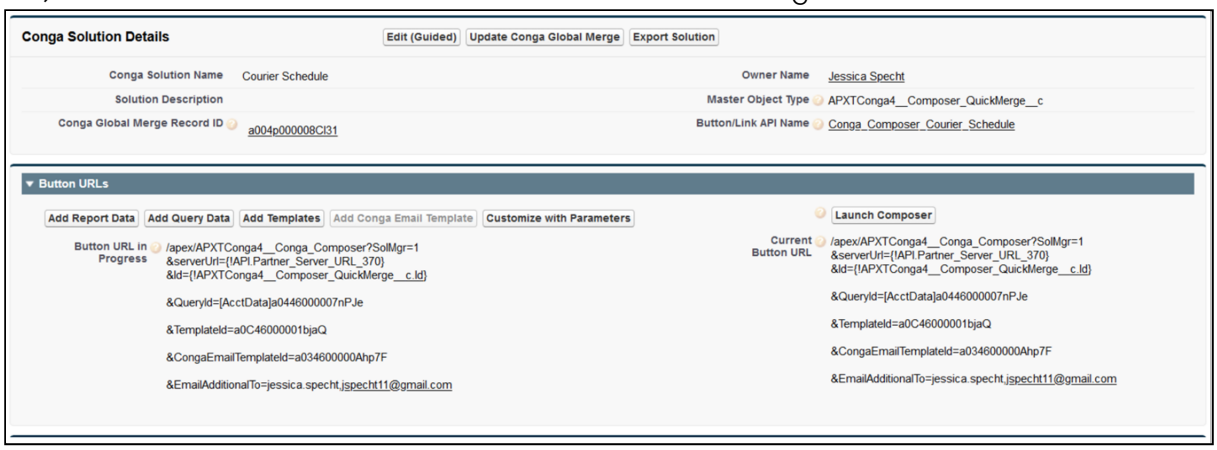
> On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

To transition from a Courier to a Composer and Batch solution, take the following steps:

1. Convert Data Gathering Reports to Conga Queries.
2. Build a Conga Global Merge Solution.
3. Add the query you created from Step 1 to the solution and use the template builder to build a template.

   > We recommend using an Excel template for this step.

4. Create a Conga email template to use with Global Merge.
5. Determine from the Courier schedule who the recipients are and add those email addresses to the Global Merge Solution using the EmailAdditionalTo parameter.
6. Add the Template and Email Template to Global Merge along with any additional desired behavior parameters (for example: defaultpdf, field update, activity logging, etc). The final solution should look similar to the following screenshot:



7. Create a Conga Batch Record and use the Record Id from your Global Merge as the Master Object Source.
8. Convert your Global Merge Solution to a formula field using the Formula Builder and set Qmode to Send Email.
9. Go to **Salesforce Setup** > **Conga Global Merge** to find the field you created and set Field Level Security to visible as shown in the screenshot below.

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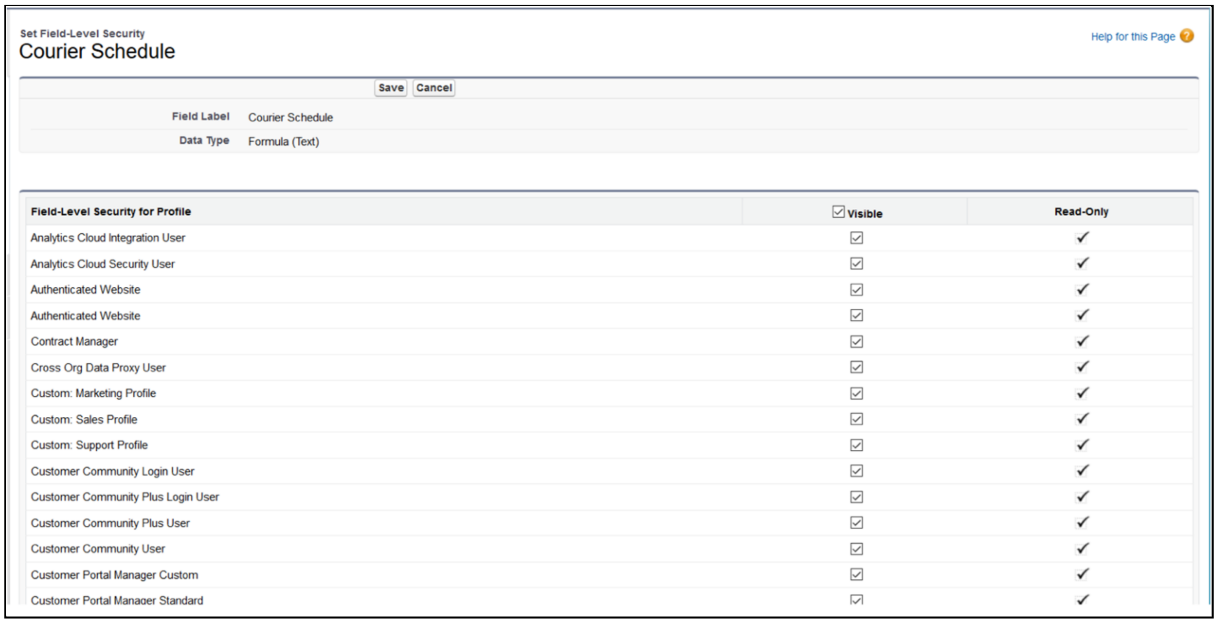
> This step is required. Not setting Field Level Security to visible results in an error when Batch runs.



10. Enable the Conga Batch Master Switch and create a Salesforce token through Conga Batch setup and then return to the Batch record to set the schedule.

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Building Courier Solutions

> On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

Information covering the core functionality of Courier. To build solutions, it best to know the basics. See Courier basics to get started.

Courier Schedules: Basic Settings

You set up a Courier Schedule on the Courier Schedules tab.

To set up a Courier Schedule:

1. Click the Courier Schedules tab.
2. Click New to create a Courier Schedule record. You choose the report and recipients after the Schedule was saved.
3. Complete the sections to set up your schedule.

For the first schedule, the configuration available to users of Professional, Enterprise, and Performance (Unlimited) Salesforce Editions is used.

Record Information Area

Schedule Title	Provide a meaningful title for the schedule.
Description	Provide a description for the schedule, if desired.
Enabled	Check the box to enable the schedule for processing
Next Run Date	Leave this field blank. Courier will populate it after evaluating the Trigger criteria (see below).

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Report Section

Select the report to deliver after the Schedule record was saved.

Export Type	Choose from Printable View, Excel or CSV
Report Parameter	Optional Enter a value to pass into the Advanced Filters of the report.

Trigger Section

Interval	Choose Hourly, Daily, Weekly, or Monthly. Depending on your selection, some of the remaining fields will be disabled, as they do not always apply. Set the remainder according to your preferences. The time zone for the hour chosen depends on the time zone setting of the user whose credentials were entered on the Setup page. The Day to Run On field, available when the Interval is Monthly, contains choices for the 1st..., the 2nd ..., the 3rd ..., the 4th ... and the last ... These choices are used in conjunction with a Monthly Day of the Week, resulting in a schedule like the 1st Friday of the Month or the 3rd Tuesday of the Month.
Don't Run On Weekends	Optional Check the box to prevent processing during weekends.
First Run Time	Optional With Interval set to More than once a day, you may specify the hour of the first execution for the day.
Last Run Time	Optional With Interval set to More than once a day, you can specify the hour of the last execution for the day.

Email Content Section

Email Subject	Provide appropriate content for the outbound email message.

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Email Body	Enter the body of the email. You can use HTML or inline CSS to style the body. If this field is blank, Courier will provide a generic message.
Email Sender	[Optional] You can select a user to override the From a value of the email (as defined on the Courier Setup page)
Email Format	Nearly all computers and mobile devices are capable of displaying HTML. We recommend this default unless the recipients of this report are explicitly limited to text.
Attachment Extension	Choose the .xls file extension if the intended recipients' computers are equipped with Microsoft Excel or Blackberry devices. Choose the .html extension for recipients that don't have Excel or those with Pocket PC devices running Windows Mobile.
Report Display	You can choose to display the report as an attachment or inline within the message. If your report has many columns, we generally recommend that you choose attachment.
Don't Send if Report Has No Data	With this option selected, no report is delivered to your recipients if the report contains zero rows of data.

Advanced Section

Don't change the Run As or Recipient Source fields unless you're attempting an advanced setup (see Advanced Configuration for Enterprise and Performance (Unlimited) Editions).

Run As	Determine the authority under which the report is executed. If set to Courier Setup Credentials, the report will run under the authority of the user specified on the Setup page. If set to User to Send As from Outbound Message, the report will be run under the authority of the user selected on the Salesforce Outbound Message.(See Advanced Setup for more details.)

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Recipient Source	Determine the source of the list of recipients for the report to be sent. If set to Schedule Record, the recipients are selected via the Select Recipients link and stored in the Recipients related-list from the Schedule Record. If set to User to Send as from Outbound Message, the recipient will be the person selected on the Salesforce Outbound Message.(See Advanced Setup for more details.)

Internal Use Fields Section

DO NOT modify any of these fields. All of these fields are maintained automatically by Conga Courier. They are visible here only to ensure compatibility with the Professional Edition.

1. Click Save.

Now that you've saved the Schedule record, you can select a report, test the schedule, and then add the production recipients.

Once your Conga Courier schedule is complete, it will be processed according to the schedule you defined. The report runs under the authority of the credentials you entered on the Setup page.

For details on how to run the report under the authority of others, see Advanced Configuration for Enterprise and Performance (Unlimited) Editions .

Select a Report for the Conga Courier Schedule

You can specify the report and recipients by using the links in the upper section of the Courier Schedule page.

Conga Courier can access only custom reports. Standard reports must be cloned and saved as custom reports.

To add a report to a Conga Courier schedule:

1. Click Select Report.

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2. Select a report from the list. Click View Report to preview the selected report.

   > Salesforce reports do not display the entire contents of Long Text Area fields, and therefore those columns will appear truncated in reports delivered with Courier.

3. Click Save.

The Report fields populate with the report name and ID.

Report-Based Recipients

In cases where a standard report used by many users is configured to return only the items visible to each user, organizations with Salesforce Enterprise and Unlimited editions may run the report under the authority of named Users, so that the reports reflect only the content they need or are authorized to see.

If your Organization has implemented the Private sharing model, where users can view only records they own it is important to know the use of this feature may incur additional usage charges for Conga Courier since each recipient will receive an individualized report. Please contact your Conga Business Analyst to enable report-based recipients options with Conga Courier.

Once your Conga Courier account has been enabled to use the report-based recipient feature you can create a normal Conga Courier schedule but you will notice a new tab in the menu called 'Select Report'.

Choose a Report that contains a list of recipients for this scheduled report. Courier will filter and pull the "Delivery Report" for each person on the "Recipient Report".

The report must be configured in the following format:

- Column 1: The email address of the recipient ("joe@xyz.com")
- Column 2: A parameter value to use to filter the delivery report (e.g. if Column 2 = User ID; filter the delivery report by User ID in pv0)
- Column 3: [Optional] The Salesforce Id of a User to use as the sender of the message ("005123467890ABC")The Don't Send if Report Has No Data option does not work with matrix type reports.

If you haven't already done so, test your solution and add recipients.

Test Run a Conga Courier Schedule

How to test run your Conga Courier schedule.

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Before you select recipients for your solution, test the schedule to ensure the report is delivered as expected.

To test run your Conga Courier schedule:

1. Add yourself as an individual user (and the only recipient).
2. Click Test Run to access the Test Run page.

From there you can trigger the immediate delivery of the report.

If you haven't already done so, add a report and add recipients.

Select Recipients for a Conga Courier Schedule

Conga Courier gives you several options for defining the scope of Report Recipients: users, contacts, roles, profiles and groups.

To add recipients to a Conga Courier schedule:

1. Click Select Recipients.

You may use any combination of the options to define the list of recipients.

Select Users

In general, using Salesforce roles, profiles or groups is considered best practice for identifying larger numbers of recipients from among users of your Salesforce instance.

However, users can also be explicitly named as recipients.

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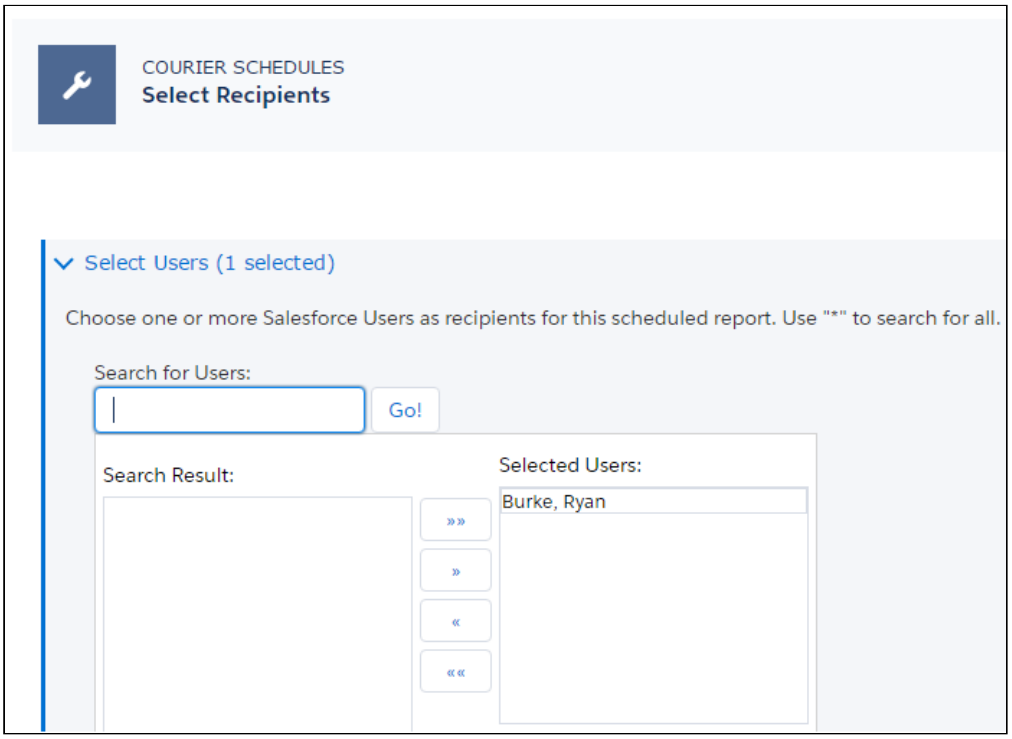

To add a user to a Conga Courier schedule:

1. In the Search for users box on the Select Users panel, type a portion of a user's or group's name.
2. Click Go to see a list of matching user names.
3. Add the names you want to the Selected Users pane.

To add a name:

Click >> to add all names in the Search Result pane or select one or more names in the Search Result pane and click > to add the selected names.

1. Repeat to add additional names.

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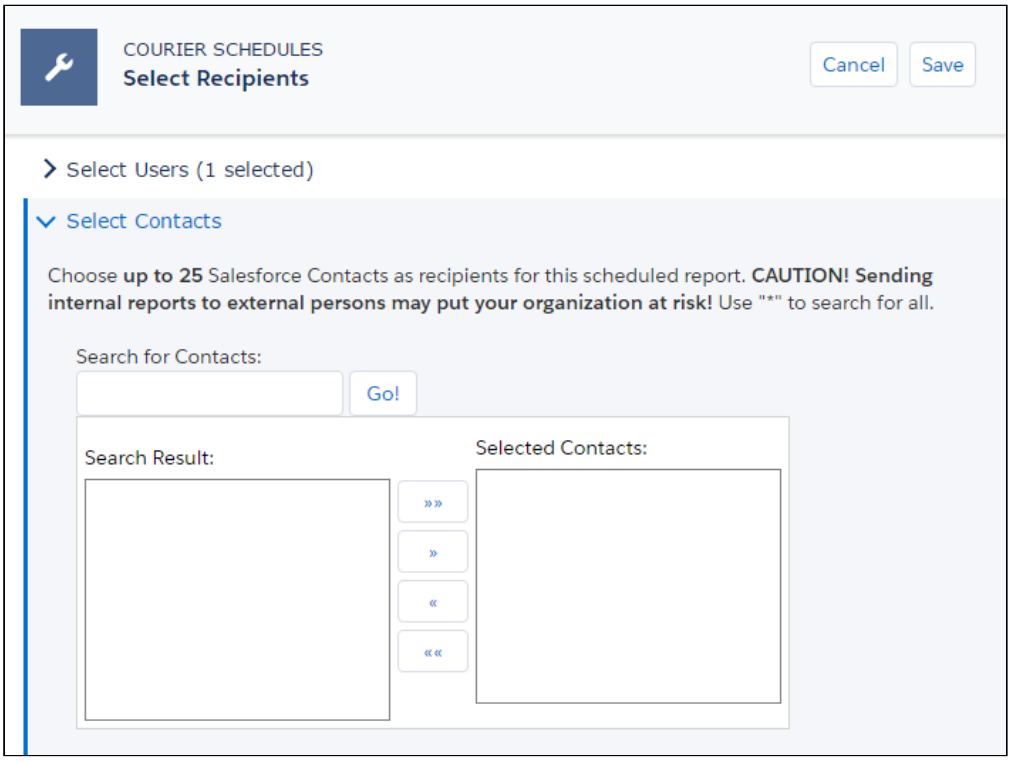
Select Contacts

You can use Conga Courier to share information with Contacts from your Salesforce instance. For example, you might want to send your distributors a daily update on current inventory levels, so they know what's available should they need to place an order.

Use the Search for Contacts tool on the Select Contacts panel to find Contacts by first name, last name, or Account Name.



To add a contact to a Conga Courier schedule:

1. Click the Select Recipients link.
2. Click the Select Contacts
3. Search for the contact name in the panel - type a portion of a user's or group's name.
4. Click Go to see a list of matching contacts.
5. Add the names you want to the Selected Contacts pane.

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To add a name:

Click > to add all names in the Search Result pane or select one or more names in the Search Result pane and click > to add the selected names.

1. Repeat to add additional names.

Conga Courier will allow a maximum of 25 Salesforce Contact entries in each Schedule.

The ability to send Salesforce reports to people outside your organization has many potential useful applications. It also offers an opportunity to share information you may not want to share. Exercise caution.

Select Roles, Profiles and Groups

The Roles, Profiles and Groups panels allow you to define recipients based on the way you have structured your Salesforce instance. These provide the most maintenance-free means of distributing reports to your User community, as the actual recipient list is determined just prior to each run of the report.

To add a role, profile, or group to a Conga Courier schedule:

1. In the Search for roles box on the Select Roles panel, type a portion of a role, profile, or group name.
2. Click Go to see a list of matching roles.
3. Add the names you want to the Selected Roles pane.

To add a name:

Click > to add all names in the Search Result pane or select one or more names in the Search Result pane and click > to add the selected names.

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1. Repeat to add additional names.

Caveats about using Groups

Within the list of Courier Recipients, you may select one or more Groups. Each Group must contain

- Named Users
- Roles
- Groups that contain Users or Roles

A few caveats with regard to Groups

- Courier scans only down one nested level (i.e., the membership of the child Group below the parent Group)
- Courier evaluates the membership of a Role, but not a Role with Subordinates

1. Click Save.

The Recipients section will reflect your selections. If you haven't already done so, add a report and test your solution.

> ⚠ See Select a Report for the Conga Courier Schedule to see your recipients related to reports.

Advanced Configuration for Enterprise and Performance (Unlimited) Editions

Running Reports on Behalf of Named User(s)

In cases where a standard report used by many people is configured to return only the items visible to each person, organizations with Salesforce Enterprise and Unlimited editions may utilize Salesforce Workflow components to run the report under the authority of named Users, so that the reports reflect only the content they need, or are authorized to see.

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In the following example, it is assumed the Organization has implemented the Private sharing model, where users can view only records they own.

The Scenario: Each Monday morning, a Regional Manager with responsibility for the Southwest Region wants to receive a report of all the open leads in her region. To reinforce the need for timely follow-up, she wants each of her four account executives to receive a similar report limited to the open leads from each of their respective Territories.

To enable this, a public report titled "Open Leads" is configured with the standard filter "My Team's Open Leads". When the Regional Manager runs the report using Salesforce, she sees all open leads from across the Region. When an individual Account Executive runs the same report, he sees only the leads in his territory.

The key to this solution adds to the standard Conga Courier configuration:

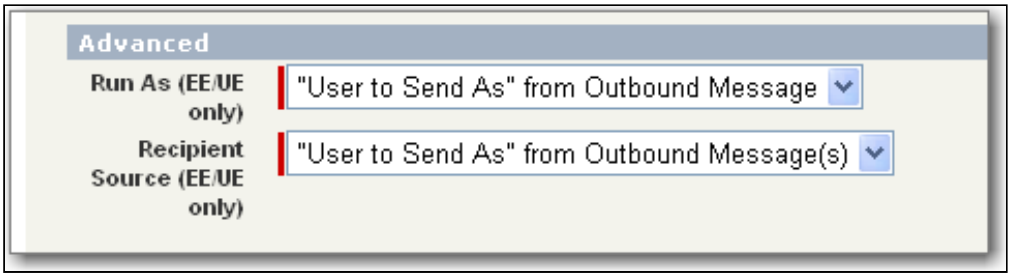
- a Salesforce Workflow Rule, and
- a separate Salesforce Outbound Message record for the Regional Manager and each Account Executive

The {{CT}} Rule monitors the Conga Courier Schedule for a condition triggered by its scheduled execution ({{CT}} Trigger). When this condition is detected, the Workflow Rule triggers each of the Outbound Messages.

The Outbound Messages provide Conga Courier with the information needed for its generation of the report on behalf of each of the five individuals. The resulting reports are delivered via email.

Advanced Section

Navigate to the Advanced Section on the new Courier Schedule record, and set the "Run As" value to "User to Send As" from Outbound Message.



Choose "User to Send As..." for the Recipient Source field. This will limit distribution to the same Salesforce Users, just as if they were each running the report manually. This will be handled via Outbound Message records.

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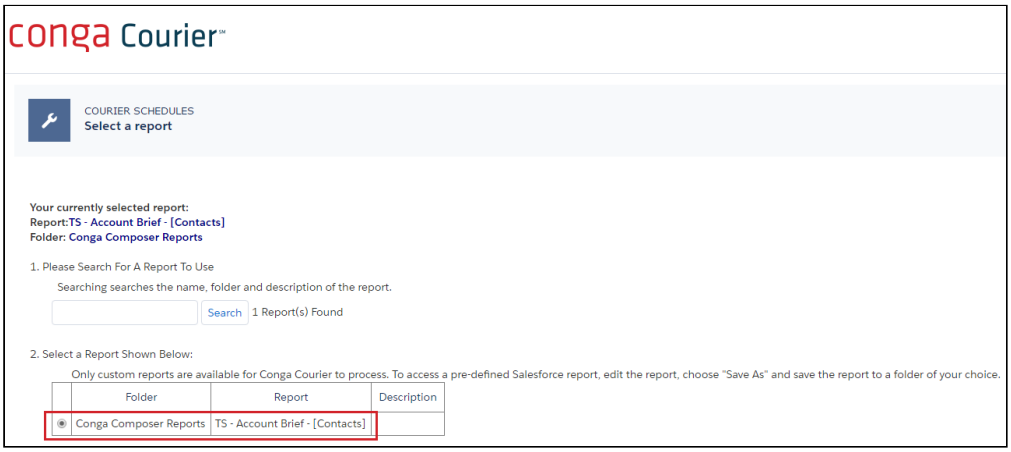


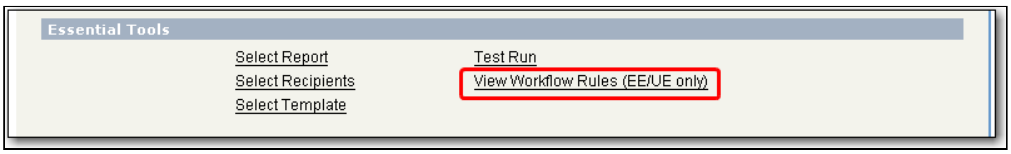
Save the Schedule, then select the desired report.

Take note of the Schedule Name (assigned automatically), or select and copy it to the clipboard for use in the following step.

For purposes of this example, we'll use the Schedule Name CS-000106.

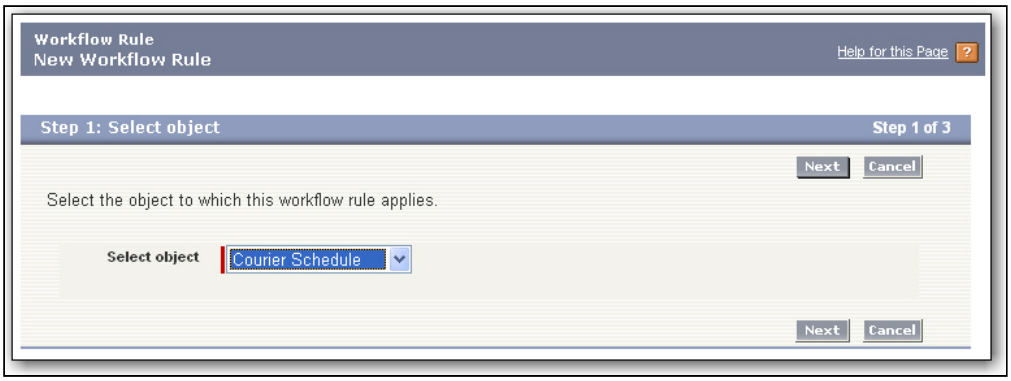
New Workflow Rule: Monitor a Courier Schedule

To access Salesforce Workflow Rules, click the link on the Schedule titled View Workflow Rules.



Click New to create a new Workflow Rule.

For "Select object," choose "Courier Schedule"



For Rule Name, we suggest "Monitor" plus the Schedule Name (e.g. "Monitor CS-000106"):

Under Evaluation Criteria, choose the radio button for "Every time a record is created or edited"

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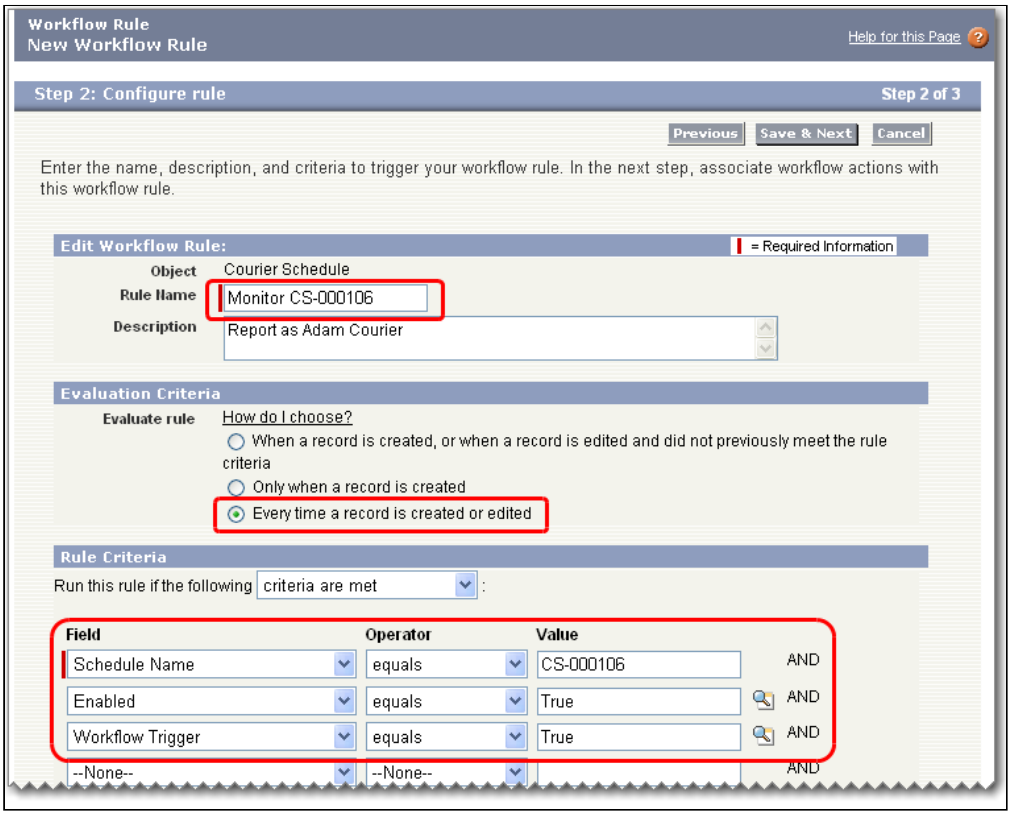
In the Rule Criteria section, set each of the three fields as shown in the example.

Schedule Name = CS-000106

Enabled = True

Workflow Trigger = True



Click Save.

Specify {{CT}} Actions

From the next Screen, click Add Workflow Action and choose “New Outbound Message”

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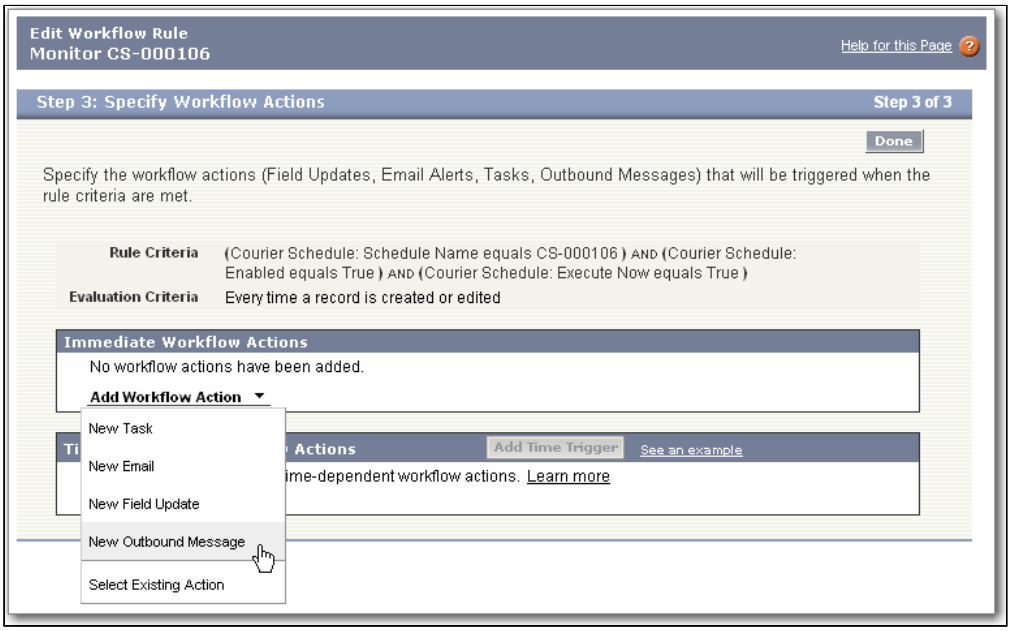
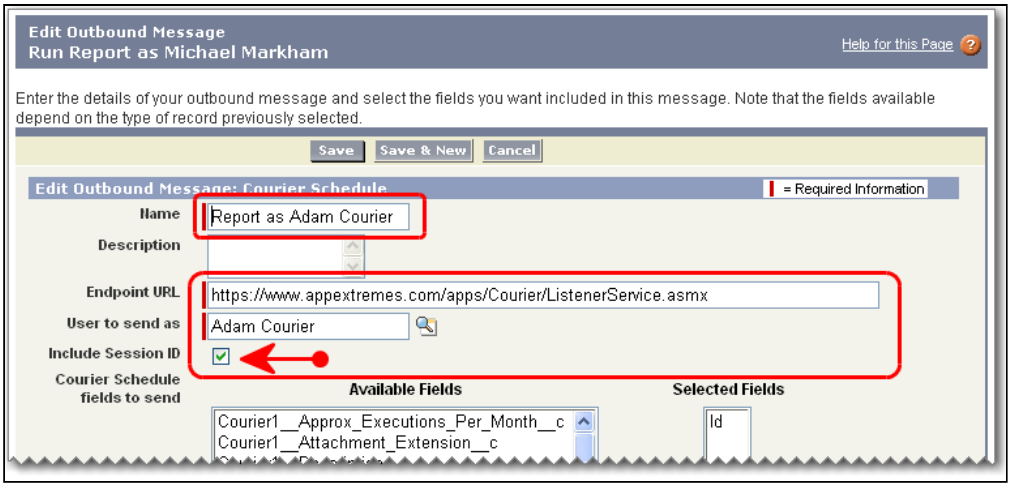


Complete the New Outbound Message as shown in this example. For the Name, we suggest "Run as" with the name of the first Account Exec.



- The Endpoint URL must be exactly as specified below: https://courier.appextremes.com/apps...erService.asmx
- Select the name of the first Account Exec in the User to send as field include Session ID - checked

Click Save.

Salesforce returns to the Workflow rule. An additional Outbound Message is required for each of the other desired recipients.

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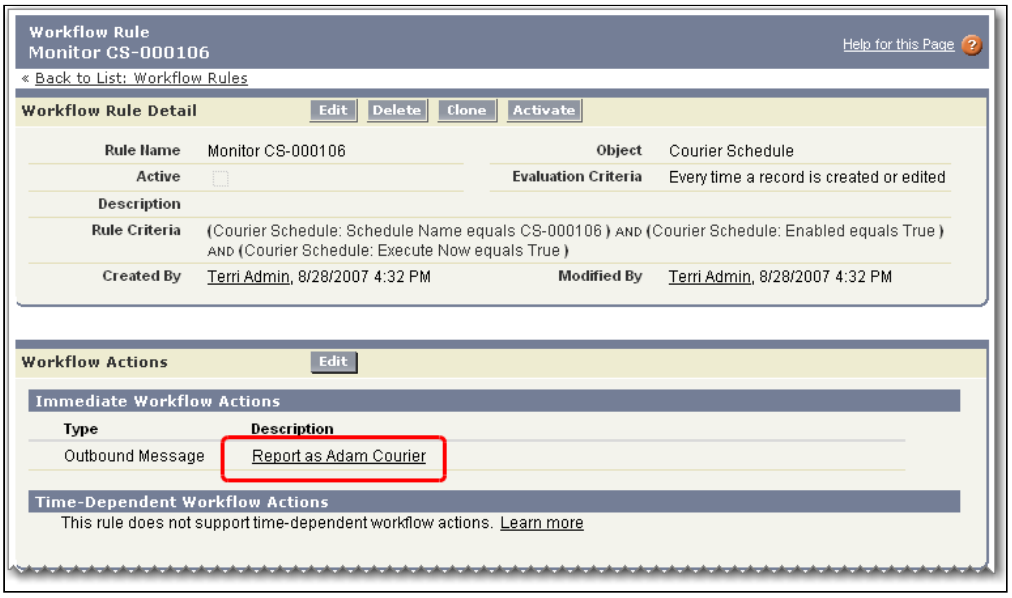
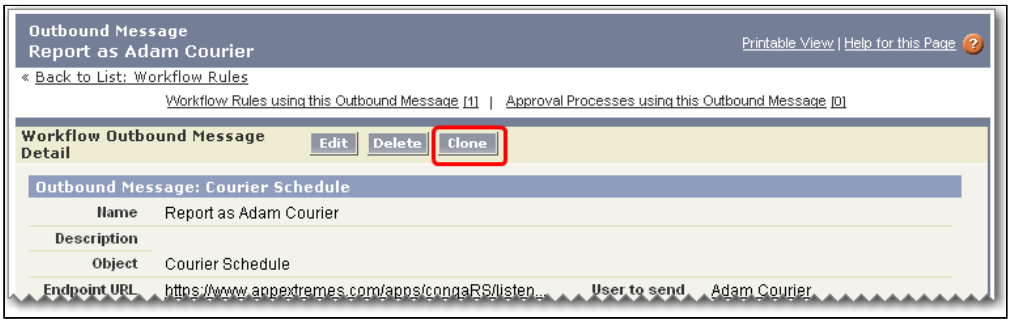


Click the highlighted link to open the Outbound Message just created...

...and click Clone to create another one. Repeat the process for each of the other intended recipients.



> Outbound Message records created for use with Conga Courier can be used by multiple Workflow Rules. There will never be a need for more than one for each User in your organization.

When all Outbound Message Records have been saved, return to the Workflow Rule and click Activate.

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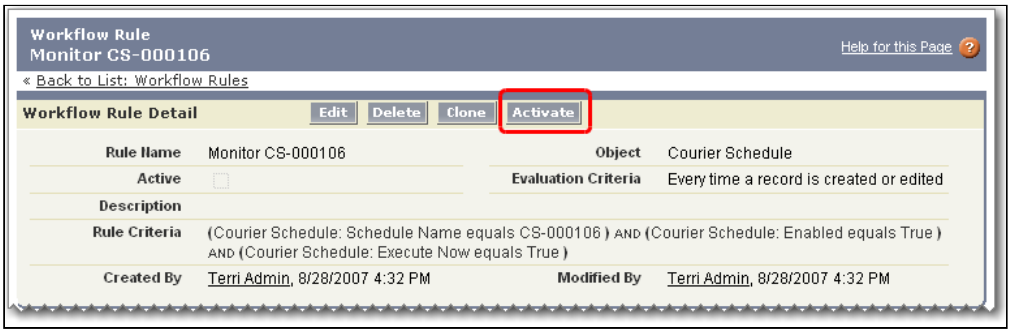
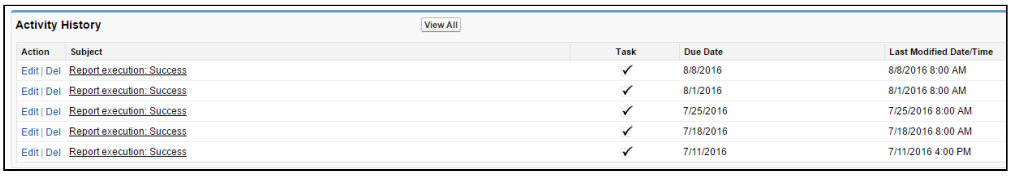


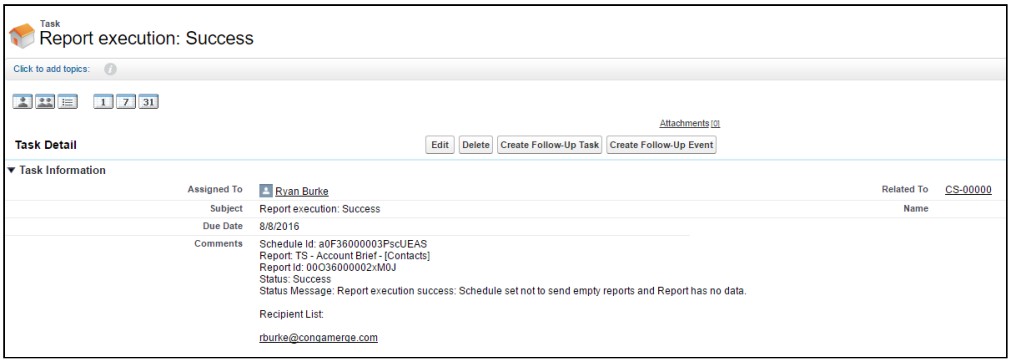
Conga Courier Advanced Setup is now complete.

Activity Logging

At the end of each Conga Courier Schedule is a section titled Activity History. This section displays a list of Task records that capture the details for each execution of the Schedule.



Details captured include the result of the scheduled process, the report title and recipient email addresses.



Activity logging takes place only after all reports scheduled for a given hour have been processed. You may find a slight delay between report delivery and posting of the activity entry.

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Monitoring Conga Courier Utilization

Conga Courier is installed with five standard reports you may use to monitor the system. These reports are stored in the Conga Courier Activity (Installed Package Conga Courier) reports folder.

All five reports can be customized to meet your needs by making changes and saving new copies of the reports. You may also wish to build new reports to address other purposes. Use these reports as a starting point for specialized reports that meet the needs of your organization.

Report	Description and Use
Approx. Executions Per Month (Active)	Provides an approximation of the total number of times per month Courier will automatically generate and send reports; this is key to keeping your costs under control. This is an approximation, not a precise count, which would require elaborate calculations taking into account weekends, months with more or less days than others, etc. Planning Ahead A field on each Conga Courier schedule is set by the Courier service with an approximation of the number of times in an average month that the schedule will execute. The values of these fields are summarized in the first report (Approx. Executions Per Month (Active)), listed above. Use this report to keep track of the total number of reports being generated each month, and adjust your subscription plan accordingly.
Courier Schedules Run by Month	Tracks the actual number of times reports are generated and emailed.
Courier Schedules Run by Report	Tracks the actual number of times reports are generated and emailed.
Large Account Update	This report is included as a sample report. You may customize this report to suit your needs and use it in a Courier Schedule.
Schedules that Failed at Last Execution	Reports on failures, typically the result of failing to select a report or recipients, the deletion of a report, etc.

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Upgrading from a Previous Version of Conga Courier

Upgrading from a previous version is easily accomplished by installing the latest version of Conga Courier from the AppExchange and setting the active Page Layout. Previously created Schedules are retained.

Do not uninstall your current version of Conga Courier!

If you uninstall your current version of Conga Courier, you will lose all of the Conga Courier components that you've already built.

To upgrade Conga Courier

1. Install the most recent version of Conga Courier.
2. From the Conga Courier listing on the AppExchange, install Conga Courier by clicking Get It Now.
3. Set the active Page Layout.
4. Set the active Page Layout for the Schedules object.
5. Choose Setup > Build > Create > Objects.
6. Click Courier Schedule.
7. Scroll to the Page Layouts section.
8. Click Page Layout Assignment, then Edit Assignment
9. Click the first row under the Page Layout header, then shift-click on the last row. This will select all of the rows.
10. If you have Performance (Unlimited) or Enterprise Edition, for the Page Layout to Use field, choose Courier Schedule Layout (UE/EE only).
    or
    If you have Professional Edition, for the Page Layout to Use field, choose Courier Schedule Layout (Professional Edition), Click Save.

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Troubleshooting Conga Courier

On May 1, 2022, Conga Courier has been officially retired. It is no longer available for usage.

I expected to receive a report, but it never arrived.

Many factors can affect whether a report can be delivered. Try checking the following items:

Courier Setup Page

- Is Courier enabled?
- Have valid credentials been entered?
- Has your trial expired?

Courier Schedule

- Is the schedule enabled?
- Have you selected a report for your schedule?
- Have you selected recipients?
- Courier requires at least one recipient.
- Perform a Test Run.
- With only yourself as the recipient, click Test Run. Does this work?
- Clear the Next Run Date field.
- Clearing the value in this field will cause the Courier Server to re-evaluate the schedule.
- Does the report still exist?
- Click the View Report button to ensure the report still exists.
- Check the Activity History of the schedule. It may offer clues as to what may have gone wrong.

Report-based Recipients

- Report-based Recipients need to be enabled for you to use this feature. Please contact your Business Analyst if you need access.

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How Do I Disable Courier from Running?

You can disable any individual schedule from being process by clearing the Enabled checkbox on a schedule. To disable Courier from scanning all schedules, clear the Master Switch checkbox on the Courier Setup tab.

How Do I Format the Email Footer or Email Body with HTML?

You may use plain text or HTML in the email footer and email body. If you choose to use HTML, you can include a simple cascading style sheet (CSS) directives that can accomplish most formatting requirements.

What Is the Maximum Report Size?

Courier has a maximum report size of 5 MB.

I Have a Schedule Set to Run Weekly on a Particular Day - How Can I Tell It to Run on Multiple Days per Week?

Create a schedule for each day.

What If a Report Contains No Records When the Schedule Is Run?

You may choose not to email reports that contain no records, though a charge is still incurred for the execution of the schedule and retrieval of the report.

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Action Required to Prevent Courier Interruption

On March 23, 2016, we are implementing changes to Conga Courier for improved security. To continue running Conga Courier schedules without interruption, you must add your security token to your Courier credentials.

Action Required to Prevent Interrupted Service:

1. Navigate to the Courier Setup tab.
2. Enter your Security Token in the Credentials section.
3. Save.

If you have questions or need assistance implementing this change, please Contact Support.

footer.elm-content-footer {display:none;} /*hides entire footer*/

Courier Error Message: Something's not working correctly

Courier Error Message: Something's not working correctly.

Error Message

Something's not working correctly. Unable to access -please make sure the connected app Conga Courier is configured correctly. [user hasn't approved this consumer]

Causes

This error message is seen when trying to access Courier Setup in Lightning without first configuring Courier as a Connected App. To correct this, configure Courier as a Connected App and then return to Courier Setup.

INVALID LOGIN: Invalid username, password, security token; or user locked out. (Release 7)

ERROR MESSAGE: Invalid login for Conga Courier.

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Is the error text in quotes below the entire error message? or is it just "INVALID_LOGIN: Invalid username, password, security token; or user locked out."

Error Message

"Conga Courier has attempted to scan your Salesforce.com instance but could not, because of invalid credentials on the Setup page. Further delivery of scheduled reports will not resume until the problem is resolved. Please login to Salesforce, choose the Conga Courier application and then the Setup tab to correct the username and password for Courier to use.

INVALID_LOGIN: Invalid username, password, security token; or user locked out."

Cause

This occurs when your Salesforce.com login credentials are incorrect.

What To Do

To correct the issue, check that you are using the correct Salesforce login information.

Issue Opening Courier Reports in Excel 2016

Issue opening reports generated by Courier in Excel 2016.

Issue

There is an issue opening reports generated by Courier in Excel 2016.

After speaking with Salesforce, we've determined the issue is due to a Microsoft update.

What To Do

To work around this issue, Microsoft has released a patch that allows you to open files exported using Export Details, the method Conga uses to deliver Courier reports. Salesforce is continuing to work with Microsoft to resolve the issue.

Review this Microsoft knowledge base article for more information and links to install the Microsoft patch. We recommend reviewing this information with your IT department prior to installing. Please see the following known issue from Salesforce documenting this issue: https://success.salesforce.com/issues_view?id=a1p3A0000008fb Another workaround is to change the export type in Courier to a CSV or HTML file, or display the report inline with the email.

We apologize for any inconvenience this may cause.

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Two-Factor Authentication for Salesforce

Using two-factor authentication with Conga Courier.

Issue

Customers who use two-factor authentication for their Salesforce orgs will not be able to use Courier. Conga can't store the second factor of authentication by design.

What to Do

Use {{CB}} to schedule and send Salesforce reports.

Create a Batch Failure Email Notification with a Salesforce Workflow Rule

Create a Salesforce Workflow Rule to notify users if a Conga Batch process fails for certain records.

To create a Batch Failure Email Notification:

1. Navigate to Salesforce Setup and access Workflow Rules.
2. Click the New Rule button to create a new Workflow Rule.
3. Select the Scheduled Conductor History object in the Object field and click Next.
4. Fill out the Rule Namefield.
5. Select created, and any time it's edited to subsequently meet the criteria for the Evaluation Criteria field.
6. Select criteria are met for the Rule Criteria.
    - Set the Field dropdown to Scheduled Conductor History: Number of Failures.
    - Set the Operator to greater than.
    - Set the Value and the Value to 0.
7. Click Save & Next.
8. On Step 3, click Add Workflow Action and select New Email Alert.
9. Fill out the Description field, Unique Name field, select a (Salesforce) Email Template.
    - Create a Salesforce Email Template if necessary.
10. Add Users to the Selected Recipients column to receive the Email Alert.
11. Click the Save button. Batch Failure Email Notifications can also be accomplished using Conga Trigger and Conga Email Templates.

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I expected to receive a Conga Courier report, but it never arrived

Troubleshooting report delivery.

Many factors can affect whether a report can be delivered. Try checking the following items:

Courier Setup Page:

- Is Courier enabled?
- Have valid credentials been entered?
- Has your trial expired?
- Did your Courier schedule get caught by a spam filter?

Courier Schedule:

- Is the schedule enabled?
- Have you selected a report for your schedule?
- Have you selected recipients? Courier requires at least one recipient.
- Perform a Test Run. With only yourself as the recipient, click Test Run. Does this work?
- Clear the Next Run Date field. Clearing the value in this field will cause the Courier Server to re-evaluate the schedule.
- Does the report still exist? Click the View Report button to ensure the report still exists.
- Check the Activity History of the schedule... it may offer clues as to what may have gone wrong.

Workflow Rules / Outbound Messages (Enterprise / Unlimited Edition Only):

- Has the Workflow Rule been activated?
- Does the Workflow Rule have the correct Rule Criteria?
- Is the Workflow Rule's Evaluation Criteria set to "Every time a record is created or edited"?
- Does each Outbound Message contain the correct Endpoint URL for the Courier Server Listener Service?
- Does each Outbound Message have "Include Session ID" enabled?

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