



Conga Revenue Lifecycle Platform



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Conga Revenue Lifecycle Platform is built to transform your unique order configuration, execution, fulfillment, and contract renewal processes within the Revenue Operations landscape.

Conga Revenue Lifecycle Platform


Release Notes

Discover what's new in the latest release of Conga Revenue Lifecycle Platform.

- [October '23 Release Notes](#)

October '23 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Revenue Lifecycle Platform October '23 release. For documentation updates, see [What's New in Conga Revenue Lifecycle Platform](#).

 This documentation may describe optional features for which you have not purchased a license; therefore, your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

Packages

There are no packages required for Conga Revenue Lifecycle Platform.

New Features

The following features are new to Conga Revenue Lifecycle Platform in this release.

Dependent Picklist

The Dependent Picklist allows the creation of a relationship between two picklist fields on an object, where the selected value in the *controlling picklist* determines the available values in the *dependent picklist*. This feature is particularly useful when you want to limit the available choices in a dependent picklist based on the value selected in a controlling picklist. You define a mapping between the values in the controlling field and the corresponding values that should be available in the dependent field. Each value in the

controlling field can have its own set of dependent values. For more information, see [Creating and Managing Dependent Picklist](#).

Record Type

Introduced a Record Type (transaction type) field to group records within a specific object. It is a label that distinguishes one transaction from another. For more information, see [Managing Record Type](#).

All Object Mappings

The All Object Mappings feature simplifies the process of mapping source objects to target objects. It provides a comprehensive view of imported external objects and enables direct source-to-target mapping on a single screen. If a required target object is missing, you can create it seamlessly. It also automatically creates a default set of fields for target objects and facilitates precise source-to-target field mapping. For more information, see [Working with All Object Mappings](#).

Formula Fields

The Formula Fields feature provides a convenient solution for transforming source formula expressions into target formula expressions that are compatible with the Conga Platform. For more information, see [Creating Formula Fields](#).

Guest User

You can now create a guest user by clicking the new **Add Guest** button on the user listing screen. You can also use the Guest User endpoints available under the [User Management APIs](#). For more information, see [Adding and Activating Users](#).

Versions Info

You can now see information about all the current versions of applications that are available within the platform application. For more information, see [Accessing Apps](#).

Document Search

You can now search and extract text or data from PDF, DOCX, or RTF documents.

Conga Revenue Lifecycle Platform REST APIs

The following endpoints are new to the existing APIs in this release:

User Management

- Role Admin
 - `PUT /api/user-management/v1/roles/{roleId}/admin-permissions`
 - `DELETE /api/user-management/v1/roles/{roleId}/admin-permissions`
- Admin Permissions
 - `GET /api/user-management/v1/admin-permissions`
- Guest User
 - `POST /api/user-management/v1/user/guest`
 - `PUT /api/user-management/v1/user/guest/{userId}`
 - `DELETE /api/user-management/v1/user/guest/{userId}`
 - `PUT /api/user-management/v1/user/guest/{userId}/restore`
- Currency Format
 - `GET /api/user-management/v1/currency-formats`
- User
 - `GET /api/user-management/v1/user/currency-format`

Data

- Custom Object
 - `PATCH /api/data/v1/custom-objects/{objectName}/bulk`
- Record Type
 - `GET /api/data/v1/custom-objects/{objectName}/recordtypes`

Schema Manager

- Field Definition
 - `POST /api/schema/v1/objects/{objectName}/fields/{fieldName}/expression/validate`
 - `GET /api/schema/v1/objects/formula-functions`
- Record Type Definition
 - `POST /api/schema/v1/objects/{objectName}/recordtype-entries`
 - `PUT /api/schema/v1/objects/{objectName}/recordtype-entries/bulk`

Conversion Management

- Currency Runtime
 - `POST /api/currency-management/v1/query/currency-rates/bulk`

Configuration Management

- Configuration
 - `GET /api/config-management/v1/configurations/categories`

Enhancements

There are no enhancements in this release.

Text Search and Alphabetical Sorting Support for Data Sync Module

The following screens of the Data Sync module are now supporting alphabetical sorting and text searches:

- Mapped Objects for Data Sync
- Field Mappings
- All Object Mappings
- All Field Mappings
- Run Details
- Schedules

Logical Operators and Regular Expressions Support for Document Search

Introduced the following enhancements in the Search API for document search:

- Support of AND and OR logical operators to create logical expression conditions for text searches. For example: You can use logical operators to search for a document that contains phrases like "pandemic," "act of God," or "war," and the expression condition would be **Document Text** *Contains ('Pandemic' AND 'Act of God,' OR 'War')*.
- Support of regular file expressions for identifying files, like **.docx,.pdf,.rtf**, and **.txt**.

Complex, Lookup, Picklist, and Multipicklist Fields Support for Platform Search

You can now use the Complex, Lookup, Picklist, and Multipicklist fields to create a search setting for Platform Search. For more information, see [Search APIs](#).

Assign Admin Permission for the Role

You can now assign the user admin permissions while defining a role. For more information, see [Creating Roles](#).

Picklist Field Support for Alias Field

You can now use the Picklist field available to the Lookup and Reference object as the alias field. For example: On the Agreement page, if you want to refer to the Account object > Contact object > Country picklist field > State picklist field, you can create an Alias field and the Alias Field Definition would be *Agreement.AccountId.ContactId.Country.State*.

Decimal Prefix Configuration for the Currency

The administrator can now configure the currency decimal places. To do this, a new field **Scale** is added to the Currency object to define the decimal prefix for the specific currency.

Error Message for Invalid Records

Previously, when you used the following User Management APIs to perform bulk delete operations, you could only get deleted record details in the response. With this release, the APIs also provide error messages for invalid records in the response.

- Object Permission: `DELETE /api/user-management/v1/objectpermissions/bulk`
- Permission Groups: `DELETE /api/user-management/v1/permissiongroups`
- User Admin: `DELETE /api/user-management/v1/users/{userId}/permissiongroups`
- Role Admin: `DELETE /api/user-management/v1/roles/{roleId}/permissiongroups`

Validation Message for Existing User

The `POST /api/user-management/v1/users/bulk` API returns the User ID in the validation error for the existing users.

Support for Inverse and Indirect Currency Rate Conversion

When there are no direct currency rate conversions, you can now calculate the inverse and indirect currency rate conversions using the [Conversion Management APIs](#). For example, you have the USD to INR and INR to JPY conversion rates in your database.

Inverse Conversion: If INR to USD conversion is not available, you can calculate the INR to USD currency rate conversion.

Indirect Conversion: If USD to JPY and JPY to USD conversion is not available, you can calculate USD to JPY and JPY to USD currency rate conversion. Only one level of indirect currency rate conversion is supported.

Ability to Share Object

You can now share and unshare the object by utilizing the **Is Shared** flag, which appears when the object is updated. For more information, see [Creating and Managing Objects](#).

Data Model Changes

There are no Data Model Changes required for Conga Revenue Lifecycle Platform.

Fixed Issues

There are no fixed issues in this release.

Known Issues

There are no known issues in this release.

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About Conga Revenue Lifecycle Platform

Conga Platform is designed to run on any world-class cloud infrastructure provider. This provides Conga with the opportunity to run on whichever cloud infrastructure is best for our business and our customers.

The Conga Revenue Lifecycle Cloud is a comprehensive suite of solutions powered by the Conga Revenue Lifecycle Platform. These solutions simplify complex processes and ensure certainty throughout the revenue cycle. From generating proposals and quotes for prospects to negotiating and finalizing contracts, managing billing, invoicing, fulfilling obligations, and renewing and expanding accounts, Conga manages these processes seamlessly to drive increased customer lifetime value.

The Conga Revenue Lifecycle Cloud ensures that your critical information, such as pricing, contracts, data, templates, etc., remains secure, current, and accessible across different processes and systems. With Conga Revenue Lifecycle Cloud on the Conga Platform, it's effortless to share files, storage, data, etcetera across your organization, regardless of the systems used by individual teams and enables seamless integration of Conga solutions throughout the entire revenue cycle.

Why Conga Revenue Life Cycle Cloud

The Conga Revenue Lifecycle Cloud increases revenue efficiency and predictability by addressing the specific complexities in your organization's revenue cycle. From identifying the revenue pipeline to capturing and managing it, the Conga Revenue Lifecycle Cloud offers complete solutions for proposal and quote generation, negotiation and execution, management and fulfillment, and renewal and expansion. The Conga Platform that powers the Conga Revenue Lifecycle Cloud is flexible, scalable, high-performing, and comprehensive. Our API-first approach allows customers to seamlessly integrate our solutions with any software they use in their business.

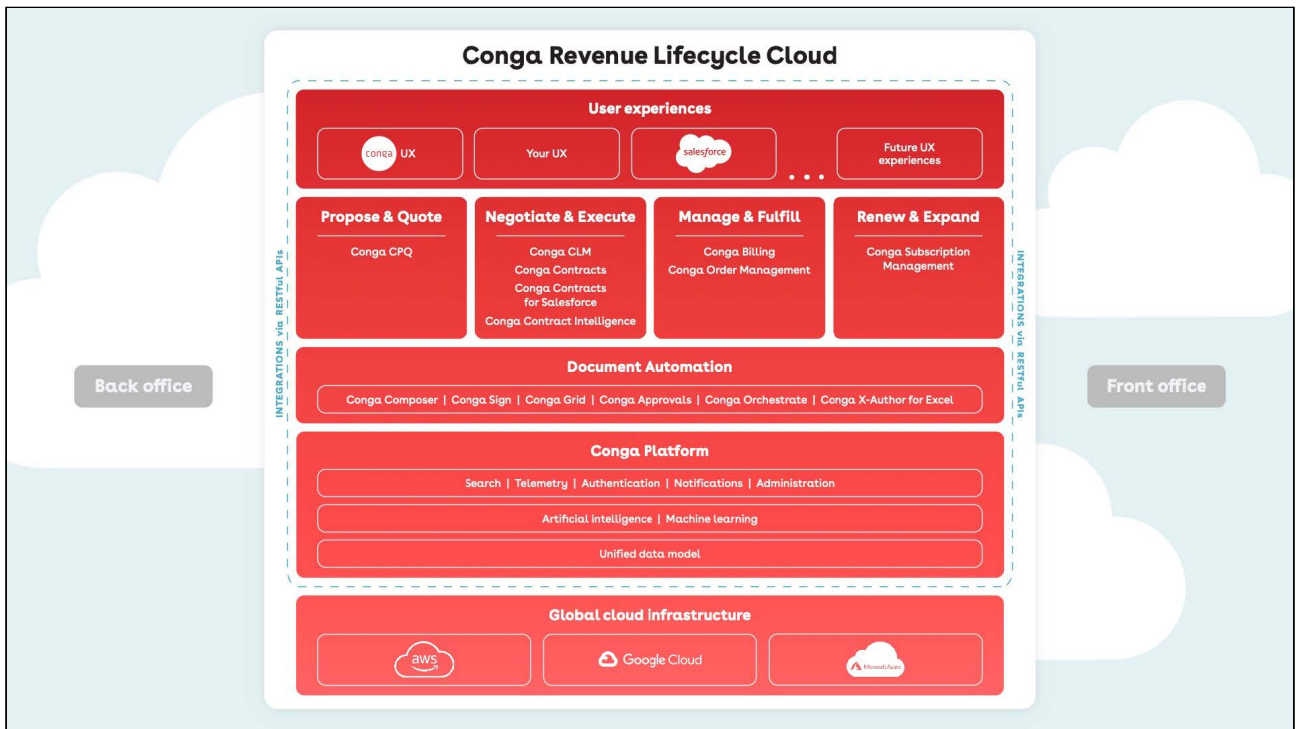
Features

- **Unified Process:** Conga Revenue Lifecycle Cloud brings currently disparate people and processes together on a common platform architecture with a unified data model.
- **Multiple User Experiences or Choices:** Conga solutions do not limit customers to a single user experience (UX). Instead, customers can benefit from the end-to-end solutions of Conga Revenue Lifecycle Cloud where they are most comfortable – be it

the Conga UX, commercial applications UX (e.g., Salesforce, ServiceNow, etc.), or even their own UX using Conga’s APIs.

- **Highly Configurable:** Conga Solutions are built to be extensible. This means that customers can configure solutions to meet their unique business process without customization. This makes subsequent upgrades easy to implement.

Architecture



What's New in Conga Revenue Lifecycle Platform

This section lists changes in the documentation to support each release.

October '23

Document	Publication Date	Topic	Description
October '23	 04 Oct 2023	Creating and Managing Dependent Picklist	New topic with information about dependent picklist.
		Creating and Managing Objects	Updated topic with information about sharing the object.
		Managing Record Type	New topic with information about record type.
		Adding and Activating Users	Updated topic with information about guest user.
		Accessing Apps	Updated topic with information about login methods and version info.
		Creating Roles	Updated topic with information about assigning admin permission for the role.
		Working with All Object Mappings	New topic with information about the source to target object mapping.
		Getting Started with Data Sync	Updated topic with information about data synchronization infrastructure.

Document	Publication Date	Topic	Description
		Creating Formula Fields	New topic with information about the Conga Platform compatible formula transformation.
		Creating a Connected App	New topic with information about the Salesforce connected app.
		Scheduling Data Sync	Updated topic with information about scheduling a sync run.
		Creating and Managing Object Mappings	Updated topic with information about object mappings.

Document	Publication Date	Topic	Description
		User Management APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Role Admin <ul style="list-style-type: none"> • PUT /api/user-management/v1/roles/{roleId}/admin-permissions • DELETE /api/user-management/v1/roles/{roleId}/admin-permissions • Admin Permissions <ul style="list-style-type: none"> • GET /api/user-management/v1/admin-permissions • Guest User <ul style="list-style-type: none"> • POST /api/user-management/v1/user/guest • PUT /api/user-management/v1/user/guest/{userId} • DELETE /api/user-management/v1/user/guest/{userId} • PUT /api/user-management/v1/user/guest/{userId}/restore • Currency Format <ul style="list-style-type: none"> • GET /api/user-management/v1/currency-formats • User <ul style="list-style-type: none"> • GET /api/user-management/v1/user/currency-format

Document	Publication Date	Topic	Description
		Data APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Custom Object <ul style="list-style-type: none"> • <code>PATCH /api/data/v1/custom-objects/{objectName}/bulk</code> • Record Type <ul style="list-style-type: none"> • <code>GET /api/data/v1/custom-objects/{objectName}/recordtypes</code>
		Schema Manager APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Field Definition <ul style="list-style-type: none"> • <code>POST /api/schema/v1/objects/{objectName}/fields/{fieldName}/expression/validate</code> • <code>GET /api/schema/v1/objects/formula-functions</code> • Record Type Definition <ul style="list-style-type: none"> • <code>POST /api/schema/v1/objects/{objectName}/recordtype-entries</code> • <code>PUT /api/schema/v1/objects/{objectName}/recordtype-entries/bulk</code>
		Conversion Management APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Currency Runtime <ul style="list-style-type: none"> • <code>POST /api/currency-management/v1/query/currency-rates/bulk</code>

Document	Publication Date	Topic	Description
		Configuration Management APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Configuration <ul style="list-style-type: none"> • <code>GET /api/configuration/v1/configurations/categories</code>

June '23

Document	Publication Date	Topic	Description
June '23	📅 07 Jun 2023	Accessing App	New topic with information on searching apps, switching between apps, and personalizing favorites for quick access.
		Conga API Connections	New topic with information on configuring the API to API Connection and UI to API Connection.
		Managing Application Schema	New topic with information on creating and managing the schema of any object.
		Managing Page Layouts	New topic with information on customizing the appearance and functionality of entity record pages and record detail pages.
		Importing Users	New topic with information on importing users from the external data source to the Conga Platform.
		Managing Views	New topic with information on saving filtered view of a record and setting it as the default view.
		Managing View Settings	New topic with information on controlling which columns are displayed in the grid, freezing/pinning a column range, rearranging the column order, and changing the column width by resizing the necessary columns.
		Filtering Records in the Grid View	New topic with information on filtering the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic.


Document	Publication Date	Topic	Description
		Managing Roles and Permission Groups	New topic with information on configuring role-based security on the Conga Platform.
		Managing Localization	New topic with information on configuring locale settings and translating text, strings, and labels to any language suitable for the specific region-wise audience.
		Managing Data Sync	New topic with information on syncing data from existing systems at regular, scheduled intervals (or on-demand) to the Conga Platform.
		Search APIs	New REST APIs
		Scheduler APIs	New REST APIs
		Conversion Management APIs	New REST APIs

Document	Publication Date	Topic	Description
		<p>User Management APIs</p>	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • API Connections <ul style="list-style-type: none"> • POST /api/user-management/v1/api-connections/{externalIdentifier} • PUT /api/user-management/v1/api-connections/{externalIdentifier} • User <ul style="list-style-type: none"> • GET /api/user-management/v1/user/guest/token • Timezone and Locale <ul style="list-style-type: none"> • GET /api/user-management/v1/decimal-symbols • GET /api/user-management/v1/digitgrouping-symbols • GET /api/user-management/v1/longdate-formats • GET /api/user-management/v1/shortdate-formats • GET /api/user-management/v1/time-formats • GET /api/user-management/v1/digitgroups • GET /api/user-management/v1/negativenumber-formats

Document	Publication Date	Topic	Description
		Schema Manager APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Object Definition <ul style="list-style-type: none"> • <code>POST /api/schema/v1/objects/customschema/import</code> • Object Metadata <ul style="list-style-type: none"> • <code>POST /api/metadata/v1/objects/customschema/export</code>
		Configuration Management APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Configuration <ul style="list-style-type: none"> • <code>POST /api/config-management/v1/configurations/export</code> • <code>POST /api/config-management/v1/configurations/import</code>
		Localization APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Translation Admin <ul style="list-style-type: none"> • <code>POST /api/localization/v1/translations/{locale}/{module}/search</code> • Translation Runtime <ul style="list-style-type: none"> • <code>POST /api/localization/v1/translations/{module}/bulk</code> • <code>POST /api/localization/v1/translations/{module}/bulk/parameters</code>

Document	Publication Date	Topic	Description
		Email APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> Email Template <ul style="list-style-type: none"> POST /api/email/v1/email-templates/render POST/api/email/v1/email-templates/{id} DELETE /api/email/v1/email-templates/{id}/{fileName}/delete DELETE /api/email/v1/email-templates/{id}/delete
		Extensibility APIs	<p>The following API endpoints are added:</p> <ul style="list-style-type: none"> Custom Code <ul style="list-style-type: none"> POST /api/extensibility/v1/customcode/{name}/publish POST /api/extensibility/v1/customcode/{name}/rollback POST /api/extensibility/v1/customcode/{name}/debuglog Custom Code History Api Resource

February '23

Document	Publication Date	Topic	Description
February '23	 09 Feb 2023	All topics	New documentation set

Conga Revenue Lifecycle Platform for Administrators

The *Conga Revenue Lifecycle Platform Administrator Guide* is designed to provide Revenue Lifecycle Platform administrators with the information required to use, customize, and configure user interface elements, business logic, role-based access, and other features of the platform.

Topic	Description
What's Covered	This guide provides information for customer administrators to use and implement extensible features of the Revenue Lifecycle Platform that are key to ensuring users of the various Conga applications on the platform are properly utilizing its services. It includes step-by-step configuration instructions where required, and use cases to demonstrate the capabilities of the Platform.
Primary Audience	<ul style="list-style-type: none"> • Conga Administrators • Conga Professional Services • Customer Administrators
Updates	For a comprehensive list of updates to this guide for each release, see the What's New topic.

Select one of the following topics for more information:

- [Logging in to Conga Revenue Lifecycle Platform](#)
- [Managing Organization](#)
- [Managing Application Schema](#)
- [Managing Page Layouts](#)
- [Managing Roles and Permission Groups](#)
- [Managing Users](#)
- [Managing Email Templates](#)
- [Managing Data Sync](#)
- [Managing Localization](#)

Logging in to Conga Revenue Lifecycle Platform

The Conga Revenue Lifecycle Platform offers a streamlined login process by leveraging an external Identity Provider (IDP). This IDP integration is established through the widely adopted OAuth 2.0 protocol, facilitating seamless communication between the application and the external identity provider. Additionally, you have the option to sign in using a SAML username.

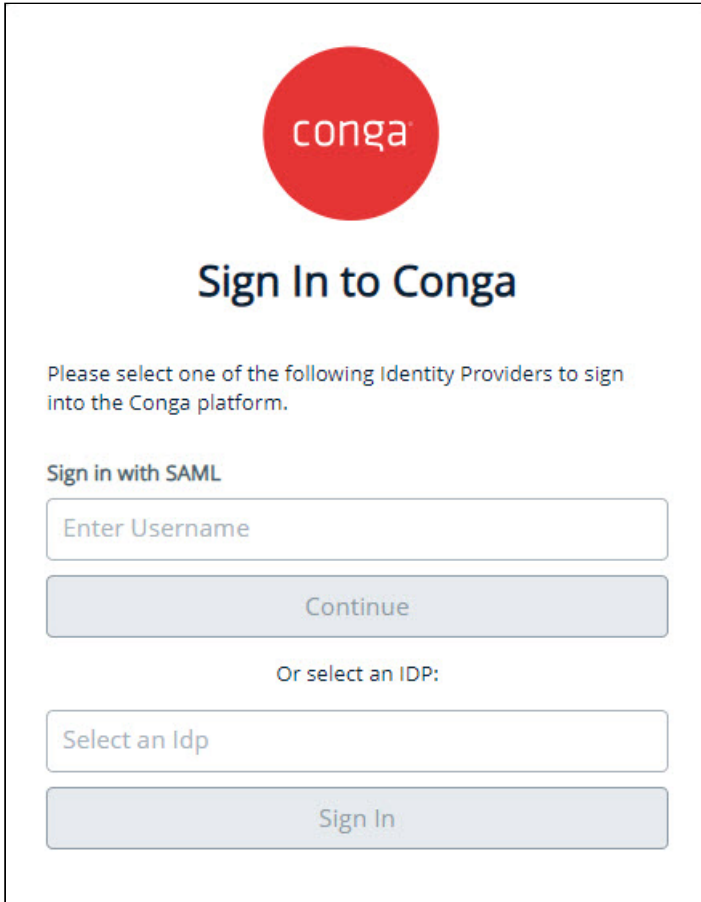
This approach eliminates the need to create new login credentials specifically for the Conga Platform application. Instead, you can utilize your existing credentials from trusted third-party identity providers or your SAML username for Sign in.

Prerequisites

You must be onboarded on the Conga Revenue Lifecycle Platform. Contact your Conga Representative for the onboarding.

To Sign-in to the Conga Revenue Lifecycle Platform

1. Open the Conga Revenue Lifecycle Platform URL in the web browser. It will redirect you to the Conga Platform login screen.



The screenshot shows the Conga login interface. At the top is the Conga logo, a red circle with the word 'conga' in white. Below the logo is the heading 'Sign In to Conga'. A message reads: 'Please select one of the following Identity Providers to sign into the Conga platform.' Underneath, there are two main sections. The first is 'Sign in with SAML', which includes a text input field labeled 'Enter Username' and a 'Continue' button. The second section is 'Or select an IDP:', which includes a dropdown menu labeled 'Select an Idp' and a 'Sign In' button.

2. If you wish to use SAML to log in, enter your username, or select the Identity Provider from the list to sign in using IDP credentials.

i Conga Platform supports the following identity providers:

- Salesforce
- Salesforce Sandbox
- Conga IDP
- Microsoft

3. Click **Continue** or **Sign In** depending upon the Sign In method you have selected. You are redirected to the respective Identity Provider or Single Sign-On login screen.

4. Enter your username and password and click **Log In**.

If you forgot your password, follow the selected Identity Provider or Single Sign-On process to reset your password.

On successful authentication, if you are a licensed user, you are redirected to the Conga Revenue Lifecycle Platform Admin home page.

Managing Organization

Organization management enables system administrators to create and manage organization-level details and external integration. You can either use the Organization Management User Interface or REST APIs as per your business needs.

You can use the following user management APIs for organization management:


- [Organization](#)
- [Organization External Integration](#)
- [API Connections](#)

Select one of the following topics for more information on the options and actions available on the user interface:

- [Viewing Conga Org Details](#)
- [Managing External Integration](#)
- [Conga API Connections](#)

Viewing Conga Org Details

In this tab, you can see the demographic information of an organization. You can also edit some of the information by clicking the **Edit** button.

 You can also use the [Organization APIs](#).

Conga Org External Integrations Conga API Connections

Conga Org Details Edit

Organization Display Name	Address
[REDACTED]	India
Phone Number	Timezone
[REDACTED]	(GMT-07:00) Mountain Standard Time (Am...
Locale	Currency
English (United States)	USD
Positive Currency Format	Negative Currency Format
\$n	-\$n
Short Date Format	Long Date Format
M/d/yyyy	dddd, MMMM d, yyyy
Time Format	Decimal Symbol
h:mm tt	.
Digit Group	Digit Grouping Symbol
123,456,789.00	.
Negative Number Format	Is Active
-n	true
Auto Provision User Enabled	Identity Provider
false	Others


Managing External Integration

The External Integrations tab allows administrators to view and manage users authorized through external organizations. In this tab, you can see one external integration entry by default. However, you can add more external integration as per your business needs.


i To manage External Integration, you can also use the [Organization External Integration](#) APIs instead of the user interface.

To add a new external integration

1. Log in to the Conga Platform as an admin user.


2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Org Management**.
3. Go to the External Integrations tab.
4. Click **Add New**.
The Add New External Integration screen appears.
5. Choose the **Identity Provider** from the dropdown list and click **Authorize**.
You will be redirected to the selected IDP's login screen.
6. Log in with your credentials.
7. Upon successful login, the **External Identifier** of the selected Identity Provider will be auto-populated in the **External ID** field.
8. Enter the **Type** of this integration.
9. Add the description.
10. Click **Save**.

To delete the external integration


1. Go to the External Integrations tab.
2. Click the **More** () icon and select **Delete**.
3. From the confirmation dialog, click **Confirm**.

Conga API Connections

In this tab, you can configure the API to API Connection and UI to API Connection to generate the Client ID and Client Secret to use the Conga APIs.


 To configure API connections, you can also use the [API Connections](#) APIs instead of the User Interface.

To configure API to API connection

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Org Management**.
3. Go to the Conga API Connections tab.
4. Click **Add API To API Connection**.
5. Enter values in the following fields.


Field	Description
External Identifier	Select the respective External Identifier for which you want to configure the connection. The external identifier list is populated based on the External Integration that you added. For more information, see External Integrations .
Client Name	Enter the appropriate client name. It will help you identify the specific connection from the list view.
Description	Enter the appropriate description.

6. Click **Save & Generation Client Secret** to generate the Client ID and Client Secret.
7. Copy the **Client ID** and **Client Secret**.

 Once copied, the Client Secret cannot be recovered. You must regenerate the client secret by clicking the **External Identifier hyperlink** on the list page > **Save & Regenerate Client Secret** button. After regenerating the Client Secret, you must update it in all of your connected API solutions.

The API to API connection is configured and activated. You can *Deactivate* or *Reactivate* any of the *Conga API Connections* by using the respective hyperlink under the *Actions* column, and *Edit* the configuration by clicking the External Identifier hyperlink on the list page.

To configure UI to API connection

1. Login to the Conga Platform as an Admin User.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Org Management**.
3. Go to the Conga API Connections tab.
4. Click **Add UI To API Connection**.
5. Enter values in the following fields. Fields marked with an asterisk (*) are mandatory:

Field	Description
External Integration	Select the respective External Integration for which you want to configure the connection.

Field	Description
Client Name	Enter the client name.
Description	Enter the appropriate description.
Redirect URI	Enter UI Callback Endpoint. It enables Conga Sign users to specify a URL that signers can access after completing their portion of a Conga Sign document successfully.
Cors Origins	Enter the Domain Name present in the callback endpoint. It allows an origin list, i.e. ["https://congplatform-test-ui.congacloud.io", "http://localhost:3000"]
Back Channel Logout URI	The back-channel specification for server-side clients (e.g. MVC).
Front Channel Logout URI	As part of the signout process, ensure that client applications are notified that the user has signed out. The Identity Server supports the front-channel specification for server-side clients (e.g. MVC).

6. Click **Save & Generation Client ID** to generate the Client ID.
7. Copy the **Client ID**.

The UI to API connection is configured and activated. You can *Deactivate* or *Reactivate* any of the *Conga API Connections* by using the respective hyperlink under the *Actions* column, and *Edit* the configuration by clicking the External Identifier hyperlink on the list page.

Managing Application Schema

Schema Manager enables system administrators to create and manage the schema of any object. You can either use the Schema Manager User Interface or [REST APIs](#) as per your business needs.

While Conga Platform applications include several out-of-the-box (OOTB) objects and fields, you may find the need to accomplish the following:

- Customize standard objects by adding more fields, picklists, and complex fields.
- Create custom objects and custom fields, picklists, and complex fields.

To open Schema Manager, go to the Conga Platform Administration dashboard and select **Schema Manager**. By default, a list of objects is displayed.


- [Creating and Managing Objects](#)
- [Creating and Managing Fields](#)
- [Creating and Managing Picklist](#)
- [Creating and Managing Dependent Picklist](#)
- [Creating and Managing Search Settings](#)
- [Managing Record Type](#)

Creating and Managing Objects

Objects in Schema Manager represent the various business objects defined for your application and include fields that store the metadata associated with the records of your business objects (for example, Agreement object metadata such as Agreement Start Date, Currency, Region, Amount, etc.). Metadata is stored in object tables in the system, and fields represent columns in those tables.

The default view lists all fields that are a part of the object. It also contains tabs for creating, viewing, and modifying picklists, and complex fields for the object.

To create a new custom object

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Schema Manager**.
3. From the Objects list page, click **Add New Object**.
The Create New Object screen appears.
4. Enter values in the following fields.

Field	Description
Name	Enter a name for the Object. The name can only include alphanumeric characters and underscores.
Description	Enter a description of the object.
Display Name	Enter a user-friendly display name for the object (for example, Wizard Input).


Field	Description
Category	Enter a Category name to associate this object with other objects or products.
Is Data Cache Enabled	Enable or disable the toggle to utilize the caching capability for faster query performance. By default, it is enabled.

5. Click **Save**.

You are directed to the object details page, where you can see some default fields that are automatically created. You can now add more fields, picklists, and complex fields to the object.


To update a custom object

1. Click the More (⋮) icon for the relevant object from the list and select **Edit**.
2. Modify the Description, Display Name, Category, and Is Data Cache Enabled fields as necessary.
3. Enable the **Is Shared** toggle to make the object a shared object.

 A new shared object with the name **objectname>_UserShare** will be created but will not be shown in the object listing screen.

4. Click **Save**.

To deprecate a custom object


 You can deprecate only custom objects.

1. Click the More (⋮) icon for the relevant object from the list and select **Deprecate**.
2. From the confirmation dialog, click **Submit**.

Creating and Managing Fields

Using Schema Manager, you can create custom fields for standard or custom objects.

To create a new field for a custom/standard object

1. Login to the Conga Platform as an Admin User.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Schema Manager**.
3. Use Basic Search to locate the object you want to update. Click the object name to open object details.
4. Click **Create New Field**.
5. Enter values in the following common fields.

Field	Description	
Display Name	Enter a user-friendly display name for the field.	
Data Type	Select the data type from the list. Other fields are rendered based on the data type selection. For a list of data types, see Custom Field Types .	
Field Name	It is auto-populated based on the display name, but you can change it. For example, if you enter Test 123 as a display name, the field name will be auto-populated as Test_123.	
Description	Enter a description of the field.	
Default Value	Enter or select a default value for the field depending on the data type.	
	Data Type	Description
Picklist Name	Picklist	Search and select the picklist that you want to use for this new field. For more information on how to create a picklist, see Creating and Managing Picklist .
Length	String and LongString	Enter the string length. The maximum length for the String data type is 2000, and the maximum length for the LongString data type is 10000.

Precision	Currency, Double, and Decimal	Specify the total length of the value. The maximum precision value that can be set is 24.
Scale	Currency, Double, and Decimal	Specify the total number of digits after the decimal point. The maximum scale value that can be set is 23. <div style="border: 1px solid #f9c94d; padding: 5px; background-color: #fff9e6;"> <p> This field is only used for display purposes for the Currency data type.</p> </div>
AutoNumber Initial Seed	AutoNumber	Enter the initial seed value. You can also add the prefix.
AutoNumber Prefix	AutoNumber	Enter the prefix that you want to add with the initial seed value. For example: If you add PLI as a prefix and your initial seed value is 00001, the new record will have the incremental number with the PLI prefix, e.g. PLI-00001, PLI-00002, and so on.
Reference Object Name	Reference	Search and select the object that this field refers to.
Lookup Object Name	Lookup	Search and select the lookup object.
Target Object	Rollup	Search and select the name of the object that the rollup field value is dependent on.
Target Object Field	Rollup	Search and select the field within the target object that will be used for computation. The target object field should be a) Double, Integer, or Decimal datatype and b) indexed, numeric, and non-formula fields.

Rollup Function	Rollup	Select the aggregate function that applies to the field that this field targets.
Rollup Filter Criteria	Rollup	Define additional filters on the target field. For example: <code>Status = 'InReview'</code>
Is Sortable	<p>Enable this toggle to indicate that this field can be used as an order by clause in search criteria.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> This field will be enabled by default if you enable the Is Indexed field.</p> </div>	
Is Required	Enable this toggle to make this field mandatory.	
Is Rich Text	LongString	Enable this toggle to use rich text formatting with this field.
Is Unique	Enable this toggle to mark the field as unique. This prevents the creation of a new field with the same name.	
Is Indexed	<p>Enable this toggle to indicate that this field can be used in the where clause. Indexed fields can be used in order by clauses as well.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> When you enable this field, the Is Sortable field will be enabled by default.</p> </div>	
Is Calculated	Enable this toggle to indicate that this field is a formula field.	
Formula	<p>Click Construct a formula here to open the Formula Builder, which allows you to quickly and easily create simple to complex expressions used to calculate field values for your object. For more information on how to create a formula field, see Formula Builder.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; background-color: #fff9c4;"> <p> This field will be visible only if you enable the Is Calculated toggle.</p> </div>	

6. Click **Save & Create New** to start creating a new field or click **Save** to save the created field.

To update the field

1. Click the More (⋮) icon for the relevant field from the list and select **Edit**.
2. Modify the required fields as necessary.
3. Click **Save**.


To deprecate the field

 Only custom fields can be deprecated.

1. Click the More (⋮) icon for the relevant field from the list and select **Deprecate**.
2. From the confirmation dialog, click **Confirm**.

Custom Field Types

When you create a custom field, you must specify the field's data type, which determines user input. The table below describes all of the available field data types as well as their limitations.

 Some data types can be enabled as a calculated field. This allows administrators to build an expression to represent the field value.

Data Type	Description
Boolean	Allows the user to select the value of the field as true or false.
String	Allows the user to enter a text value of up to 2000 characters (minimum 1). You can limit this by specifying a value for Length.
Currency	Allows the user to specify a currency amount. Locale formatting for currency is based on user locale settings. Precision indicates the allowed length of the number in its entirety (including the decimal), whereas Scale defines the maximum number of digits to the right of the decimal. You can set a default value for this field.

Data Type	Description
Date Time	Allows the user to select a date and time. You can set the default date and time as blank or the current or future date and time.
Auto Number	Automatically assigns a unique number to each record. Specify the initial seed for the first Auto Number record. Subsequent records are assigned with the number increased by one.
Picklist	Allows the user to select a single value from a list. You can also set the default picklist value.
Multipicklist	Allows the user to select one or more values from a list. You can also set the default picklist values.
Reference	<p>Contains reference or address of created objects. You can define a rollup field based on a reference field, but not on a lookup field. You can use a reference in places where the ID is insufficient. Lookup can be used in instances when you need to show the record GUID as well as the name.</p>
Lookup	<p>Creates a Lookup relationship between two records. For example, Account and Opportunity (you can associate an account with an opportunity by creating a lookup field on the Opportunity entity).</p> <div data-bbox="563 1256 1426 1346" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> By default, lookup fields are indexed.</p> </div>
Identifier	<p>Unique identifier of any records located in the Conga Platform. Internally, the identifier is a GUID. The platform only creates GUIDs for the out-of-the-box ID field. The platform does not auto-populate any additional fields defined as Identifier.</p>
LongString	<p>Allows the user to specify a text value up to 64K characters (minimum 1). You can limit this by specifying a value for Length and rendering the field as a text area.</p> <p>Use this for paragraphs or long phrases.</p>

Data Type	Description
Double	<p>A 64-bit number that includes a decimal point. Doubles have a minimum value of -2^{63} and a maximum value of $2^{63} - 1$. When you need a more granular scale value, use decimal; otherwise, use double.</p> <p>For example:</p> <p>Double Pi = 3.14159;</p> <p>Double e = 2.7182818284D;</p>
Decimal	<p>Allows the user to enter a number with decimal places. Precision indicates the allowed length of the number (including the decimal), while Scale defines the maximum number of digits to the right of the decimal. You can set a default value for this field.</p>
Int	<p>Allows the user to enter a whole (real) number. You can set the default integer value for this field.</p>
Rollup	<p>A rollup field contains an aggregate value computed over the records related to a specified record.</p> <p>For example, the Total Agreement Value roll-up field could be aggregated based on the values of all agreement line items using the expression <code>SUM(Line Item Amounts)</code>.</p>
Image	<p>Allows the user to enter the image URL/path. The image data type field must not be indexed, sortable, or calculated.</p>

Formula Builder

When creating a **Formula** field for your object, create a field in Schema Manager and enable the **Is Calculated** toggle. This enables **Formula Builder**, a tool that allows you to create expressions to calculate the value of a field (for example, calculating the Net Price of a line item using the formula `SalesPrice * Quantity`).

Click **Construct a formula here** to open the *Formula Builder*, which allows you to quickly and easily create simple to complex expressions used to calculate field values for your object. All of the fields in the context object are available to use in the expression.


To create a calculated field expression


1. Click the Fields tab, select a field from the list, and click **Insert** to add it to the expression.
2. Click the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
3. Click any operator available below the expression window to add it to the expression.
4. Continue building your expression.
5. Click **Validate** to validate your formula. The application validates the formula and displays the validation message if applicable.
6. When you are finished, click **OK**. The expression you created is displayed in the **Formula** field.
7. Click **Save** to finish or **Save & Create New** to create more custom fields.

Creating and Managing Picklist

Create a **Picklist** to define picklist values that can be re-used by fields across multiple objects. For example, you want to leverage the same global set of values for **Priority** picklists used in different objects (Agreement Severity, Account Rating, Order Priority). When creating a Picklist or MultiPicklist field for an object, you can specify which picklist to use.

To create a picklist

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Schema Manager**.
3. Use Basic Search to locate the object you want to update. Click the object name to open object details.
4. Go to the PickList tab and click **Create New Picklist**.
5. Enter a **Name** for the Picklist. This value appears in the *Picklist Name* field when you create a new picklist field for an object.
6. Enter the **Display Text** and **Value**. The Display Text can be anything that identifies the option and will appear in the *Default Value* field to set the default value. The value is the displayed value in the picklist.
7. Enter a Sequence for the picklist entry. It defines the order for multiple picklist entries.
8. Click the **Add PickListEntry** link to add more entries.
9. Click **Create**.

 The picklist entry must have a unique Value and Sequence.

To update the picklist

1. Click the More (⋮) icon for the respective picklist from the list and select **Edit**.
2. Modify the **Display Text** and **Sequence** fields as needed.
3. Enable the **Is Deprecated** toggle to deprecate the specific picklist entry.
4. If you need to add a new picklist entry, click the **Add PickListEntry** link.
5. Click **Save**.

To deprecate the picklist

1. Choose a picklist from the list and enable its **Deprecate** toggle.
2. Click **Confirm**.

Creating and Managing Dependent Picklist

The Dependent Picklist allows you to create a relationship between two picklist fields on an object, where the selected value in the *controlling picklist* determines the available values in the *dependent picklist*. This feature is particularly useful when you want to limit the available choices in a dependent picklist based on the value selected in a controlling picklist. You define a mapping between the values in the controlling field and the corresponding values that should be available in the dependent field. Each value in the controlling field can have its own set of dependent values. For more details on creating a picklist, refer to the [Creating and Managing Picklist](#).

For example,

A Country (e.g. USA) object has two picklists named State and City.

- State (controlling picklist) contains different state name values such as Alabama, Arizona, California, etc.
- City (dependent picklist) holds values such as Los Angeles, San Diego, San Mateo, etc.

Now, if you select California as a State, the City field should contain values such as Los Angeles, San Diego, San Mateo, etc.

To create a dependent picklist

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Apps** > **Schema Manager**.

- Use Basic Search to locate the object you want to update. Click the object name to open object details.
- Go to the Dependent Picklist tab and click **Create Dependent Picklist**.
The Create Dependent Picklist screen appears.

- Enter values in the following fields.

i Picklists must be created and associated with an Object before you define the relationship between them.

Field/ Button	Description
Controlling Picklist Field	Select a controlling picklist (e.g. Country) as per your business needs. This field controls the values available in the Dependent Picklist Field.

Field/ Button	Description
Dependent Picklist Field	<p>Select a dependent picklist (e.g. State) as per your business needs. The values in this field change dynamically depending on the controlling picklist field selection.</p> <p>The options below allow you to define the relationship between the controlling picklist field and dependent picklist fields. You can define multiple controlling and dependent picklist field item relationships.</p> <ul style="list-style-type: none"> • *Controlling Picklist Field Items: Select a controlling picklist field item (e.g. USA) from the list. This field controls the options available in the Dependent Picklist Field Items. • *Dependent Picklist Field Items: Select a dependent picklist field (e.g. CA -California, AL-Alabama, AZ -Arizona, etc.) item from the list. The values in this field change dynamically depending on the controlling picklist field item selection.
Add New Entry	Click Add New Entry to add multiple controlling and dependent picklist field item relationships.
Delete Entry	Click Delete to remove controlling and dependent picklist field item relationships.
Save	Click Save to save the Dependent Picklist.
Cancel	Click Cancel to cancel the operation.

To update the dependent picklist

1. Click the More (⋮) icon for the relevant dependent picklist from the list and select **Edit**.
2. Modify the **Controlling Picklist Fields Items** and **Dependent Picklist Fields Items** as needed.
3. Click **Add New Entry** if you want to add another controlling and dependent picklist field item relationship.
4. Click **Save**.

To delete the dependent picklist

1. Click the More (⋮) icon for the relevant dependent picklist from the list and select **Delete**.


2. From the confirmation dialog, click **Confirm**.

Creating and Managing Search Settings


Objects and fields are available to your users with search settings through Schema Manager. Only searchable objects appear in your org and you can use search settings to get a clear picture of your available fields. The records returned in your search results depend on whether an object is related to the record and if the field is searchable. If you search for a term and no results appear, you don't have access to the related field. Your admin must enable field access for you to see more results.


For example: If the Document object and its fields are enabled in search settings then users can perform a full-text document search. When a new document is uploaded or an old one is replaced, its contents are available as search terms to retrieve the document. This setting applies only to searches for the document object.

To configure search settings

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Schema Manager**.
3. Use Basic Search to locate the object for which you want to define the field search settings. Click the object name to open object details.
4. Go to the Search Setting tab.

Options	Descriptions
Search	Select the checkbox next to the field's record to include the field in an extended search. Selecting this option enables other options for the field search.
Typeahead	Select this checkbox to allow a typeahead search for the field. If this setting is enabled, a list of recently viewed records that match the user's search keywords is displayed in the sidebar search.


Options	Descriptions
Priority	Select this checkbox to set the search priority of the chosen field. The application prioritizes records with the search terms closer together with few or no intervening words if field priority is specified. Records with similar word sequences are given higher priority. Similarly, if only one alphanumeric string is indexed, then exact matches are given priority over matches with words in between.
Set Priority	Allows you to enter the priority that you want the system to consider when searching for multiple fields. Click the Edit () icon and enter the priority as per your business needs.

 The search setting is auto-saved once you select the checkbox.

To modify search settings

You can easily add or update search options from the existing search settings by checking or unchecking the corresponding options.

1. Navigate to the Object Details page to modify the field search settings.
2. Go to the Search Setting tab.
3. Make the necessary changes.

 The search settings are auto-saved once you check or uncheck the checkbox.

To delete search settings

1. Navigate to the Object Details page to delete the field search settings.
2. Go to the Search Setting tab.
3. From the confirmation dialog, click **Confirm**.

Managing Record Type

Record type (transaction type) is a way to group records within a specific object. It is a label that distinguishes one transaction from another. Quotes, Contracts, Orders, Products, Accounts, and other transaction types are commonly used in commercial transactions. Each transaction type may be associated with a distinct business process that adheres to

a defined workflow and includes a distinct experience. Identifying the transaction type is a critical step for business users, often the first step in the business process.



Below are examples of when record types may be needed:

- Accounts types that different groups need to access – customer accounts, partner accounts, etc.
- Opportunity types from different revenue streams – online, retail, etc.
- Contract types based on business user – NDA, MSA, SOW, etc.

When you create a new object, the RecordType field appears as a picklist in the PickList tab out of the box. You can add picklist values for the RecordType based on your business process and flow. When you enter a picklist value into the RecordType picklist field, it is added to the object's field list.

 The RecordType field cannot be deprecated; however, any picklist value can.

To add picklist values

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Schema Manager**.
3. Use Basic Search to locate the object you want to update. Click the object name to open object details.
4. Go to the PickList tab.
5. Click the More () icon for the RecordType picklist entry from the list and select **Edit**.
6. Click the **Add PickListEntry** link to add picklist values.
7. Enter the **Display Text** and **Value**. The Display Text can be anything that identifies the option and will appear in the Default Value field to set the default value. The value is the displayed value in the picklist.
8. Enter a **Sequence** for the picklist entry. It defines the order for multiple picklist entries.
9. Click the **Add PickListEntry** link to add more entries.
10. Click **Save**.

 The picklist entry must have a unique Value and Sequence.

To update the picklist values

1. Click the More () icon for the RecordType picklist entry from the list and select **Edit**.

2. Modify the **Display Text** and **Sequence** fields as needed.
3. Enable the **Is Deprecated** toggle to deprecate the specific picklist entry.
4. If you need to add a new picklist entry, click the **Add PickListEntry** link.
5. Click **Save**.

Managing Page Layouts

The Page Layout Editor is a powerful tool that allows you to customize the appearance and functionality of entity record pages and record detail pages in a user-friendly manner. It provides a drag-and-drop interface, making it easy to control the layout and placement of various components.

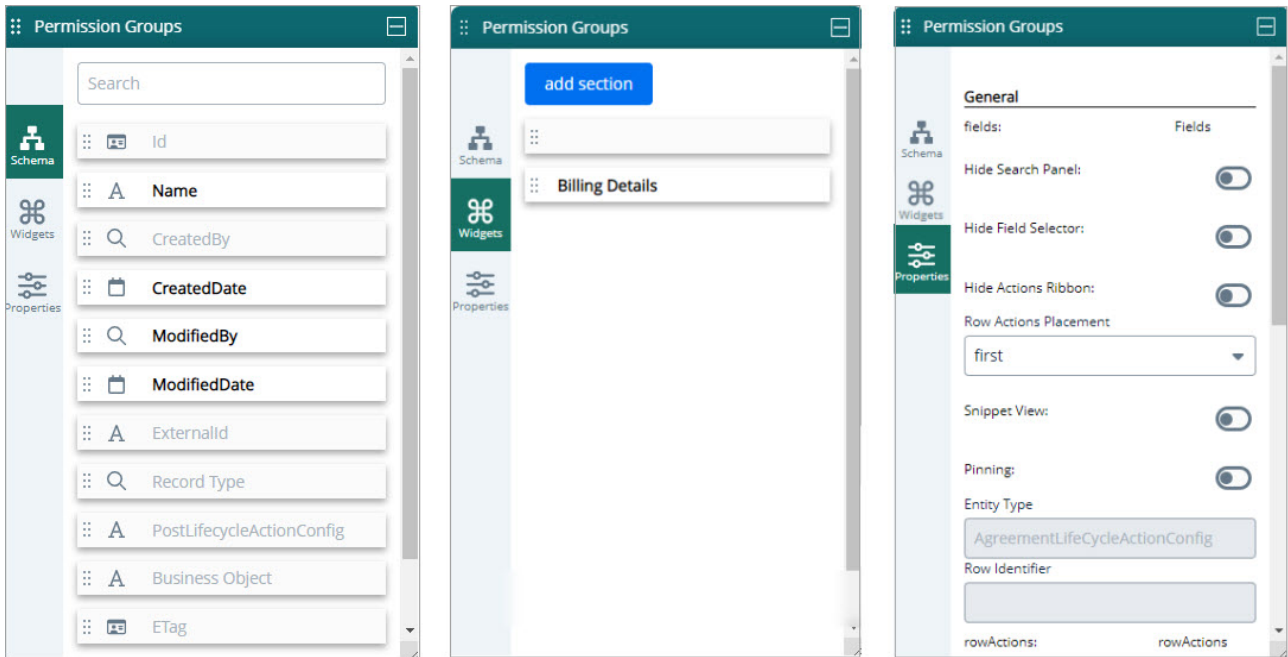
- ✔ You can modify the layout of any basic business object or entity as well as a customized entity.

Key features of the Page Layout Editor:

1. **Configure Entity Information on Grid View:** Determine the specific fields and data that are displayed when viewing a list of records. You can choose which attributes or properties of an entity (such as an email or a contact) are shown in the grid view.
2. **Manage Record-Level Entities:** Manage the appearance and behavior of individual records or entities.
3. **Related Lists (Sections):** Related lists are typically used to display records related to the current record being viewed. For example, if you are viewing a customer record, related lists could include their orders, contacts, or support cases. The Page Layout Editor enables you to manage these related lists, including which related entities are displayed and the ordering of the lists.
4. **Define Rules for Individual Fields:** Define rules for individual fields within a record. You can control which fields are visible, editable, or required when viewing or editing a specific record.

Layout Editor UI Overview

The layout editor user interface has three main sections: Schema, Widget, and Properties



1. **Schema** - Allows you to control which entities or objects are displayed on a page and in what order. You can search for and drag entities in your page layout.
2. **Widget** - Allows you to add a new section for related lists on the record detail page and easily rearrange its position by dragging and dropping it above or below other sections.
3. **Properties** - Allows you to configure specific properties for any component, section, form field, or button highlighted on the Grid View or Record Detail pages.

Select one of the following topics for more information on the options and actions available on the user interface:


- [Working with Grid View Page Layout](#)
- [Working with Record Detail Page Layout](#)

Working with Grid View Page Layout

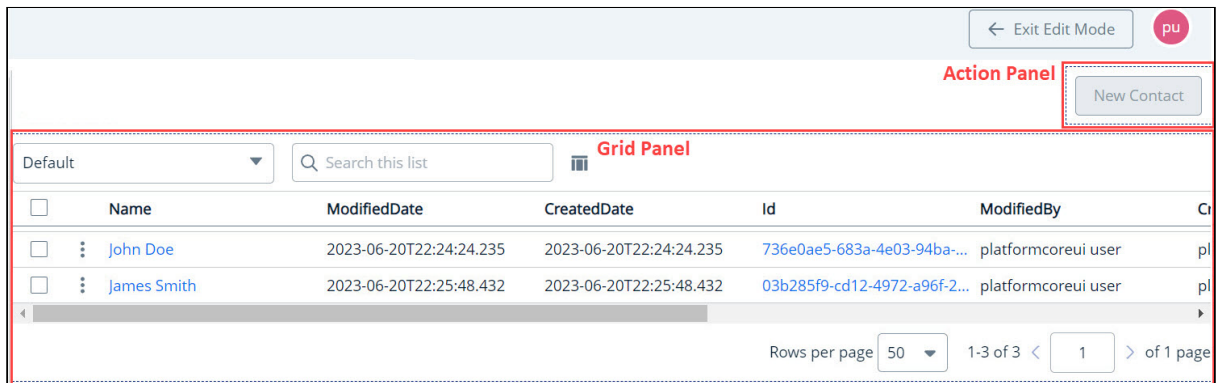
The Page Layout Editor allows you to customize the Grid View (List View) page according to your business needs and preferences. You can control which columns in the Grid View are displayed. This allows you to focus on the most relevant data and hide unnecessary columns, providing a more streamlined and personalized view of the information. Additionally, you can add action items (buttons) as a provision to accomplish specific actions from within the screen.

i This section uses the Contact object as an example, although the page layout editor can be used to modify the layout of any entity, regardless of the application or component it belongs to.

To manage a grid view layout



1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Object Data Explorer**.
3. Select the object for which you want to change the page layout.
The Grid View of the selected object appears.
4. Click **Edit Page** from the top right corner. The Grid View page appears in editable mode.

The Grid View page is comprised of two major components: **Action Items** and **Grid Items**



5. Click the **Grid Panel** to control the grid area components and their characteristics.
The Popup appears, allowing you to perform the actions shown in the below table.


Options	Descriptions
Schema	Allows you to control which columns in the Grid View are displayed. Search for and drag-and-drop entities in your grid layout. Click and drag a column name to Move it before or after another column in the list.

Options	Descriptions	
Properties	Allows you to configure specific properties for any component, section, field, or button on the Grid Panel.	
	Option	Description
	General	
	Hide Search Panel	Enable this toggle to hide the search panel grid.
	Hide Field Selector	Enable this toggle to hide the field selector  (View Settings) from the grid.
	Hide Action Ribbon	Enable this toggle if you want to restrict users to be able to save any modifications to the record. The Save and Cancel buttons on the <i>Edit Record Details</i> page will be disabled.
	Row Action Placement	Select the location where the "More" icon for the related record should appear for actions like edit, delete, etc.
	Snippet View	Enable this toggle to enable an option to view additional information associated with the selected record. Click the arrow () icon next to the record to expand it.
	Pinning	Enable this toggle to pin columns on the left and right sides of a grid panel while keeping the middle columns scrollable. It gives enhanced visibility of important data while scrolling horizontally, improved navigation, easy comparison of data points across different rows, and access to constant information.
DraggableRows	Enable this toggle to make individual records within the list draggable, allowing users to rearrange their order by dragging and dropping them. It enhances the user experience by providing a more interactive and intuitive way to reorder items in a list.	

Options	Descriptions		
	<p>Pagination</p> <table border="1"> <tr> <td>Rows Per Page</td> <td>Enter the number of rows you want to display per page.</td> </tr> </table>	Rows Per Page	Enter the number of rows you want to display per page.
Rows Per Page	Enter the number of rows you want to display per page.		

- Click the **Action Panel** to control the action buttons. The Popup appears, allowing you to define a new action button and control the visibility of action buttons that are already available.

Option/ Button	Description
General	
Actions	Click the Down Arrow and select the action you want to display on the action panel.
Max Actions	Define the maximum number of action buttons you want to show on the action panel.
<p>For example, If you select three items from the Actions list and you allow two max actions, only two action buttons will appear on the screen; the third will be accessible through the More menu.</p>	
Create Button	
Action Name	Enter the name of the action as per your business needs.
Action Function Name	Enter the name of the action function (name of the screen) where you want to redirect the user when the action button is clicked.
Add	Click Add to save the action button. The newly added button is now accessible from the Actions dropdown list.

 The Page Layout Editor allows you to create a button to carry out specific tasks, but the respective application or component admin must define allowed actions and what happens when you click the button.

7. Click **Remove** (X) to remove the entity from a grid.
8. Click **Save** to apply changes to the grid view.

Working with Record Detail Page Layout

The Page Layout Editor allows you to manage the components of the *Record Detail* page, such as fields and sections (related lists). You can control which fields are displayed, the order in which they appear, and configure tabs to show associated fields.




The **Record Detail** page is comprised of two major components:


- The **Details** for a single record, or instance, of the entity associated with the page, including all of its field metadata.
- Sections (related lists) in the form of one or more **Tabs** that display a list view for a related entity.

To manage a record detail page layout

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Apps** > **Object Data Explorer**.
3. Select the object for which you want to change the record detail page layout. The Grid View of the selected object appears.
4. Click **Edit Page** from the top right corner. The Grid View page appears in editable mode.
5. Select the **grid** tab. The record grid is highlighted.
6. Click the ID or Name entity. The Record Detail page appears in editable mode.
7. Click **{name} Details** tab. The Popup appears, allowing you to perform the actions shown in the below table.

Options	Descriptions
Schema	Allows to control which entities or objects are displayed on a page and in what order. Search for and drag-and-drop fields in the detail page layout.

Options	Descriptions
Properties	<p data-bbox="331 376 448 405">Sections</p> <p data-bbox="331 461 1339 573">Allows to add a section for related lists and easily rearrange its position by dragging and dropping it above or below other sections. You can create a new section or select an existing one from the list.</p> <ul data-bbox="435 600 1409 1070" style="list-style-type: none"> <li data-bbox="435 600 1409 786">• To define a new section: <ol data-bbox="507 640 1409 786" style="list-style-type: none"> <li data-bbox="507 640 1409 669">i. Click Add Section. The Add Section window appears. <li data-bbox="507 678 1409 707">ii. Enter the Section Name as per your business needs. <li data-bbox="507 716 1409 786">iii. Click Add. The newly added section now appears under the list of sections. <li data-bbox="435 795 1409 987">• To add an existing section to the details page: <ol data-bbox="507 835 1409 987" style="list-style-type: none"> <li data-bbox="507 835 1409 904">i. Drag and drop the section in your details page layout. The section now appears in your details page layout. <li data-bbox="507 913 1409 987">ii. Click and drag a section name to Move it before or after another section in the list. <li data-bbox="435 996 1409 1070">• To remove a section from the details page, select the section and click the Delete () icon. <p data-bbox="331 1106 528 1135">Manage Entity</p> <p data-bbox="331 1191 1393 1265">Allows to configure which fields in the section are editable and/or required for your users when they view or edit records. You can perform the following actions:</p> <ul data-bbox="435 1292 1422 1518" style="list-style-type: none"> <li data-bbox="435 1292 1422 1321">• To allow field-level editing, enable the Inline Edit toggle. <li data-bbox="435 1330 1422 1404">• To make a field mandatory, go to the section and click the field title you want to set properties for. Enable the required toggle. <li data-bbox="435 1413 1422 1442">• To allow users to modify the field, enable the editable toggle. <li data-bbox="435 1451 1422 1518">• To remove a field from the section, select the field and click the Delete () icon. <div data-bbox="336 1534 1426 1621" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p data-bbox="360 1559 1329 1588"> The Properties options vary based on the selected section or field name.</p> </div>

8. Click and drag a field name to **Move** it before or after another field in the section.
9. Click **Remove** () to remove the field from a page.
10. Click **Save** to apply changes to the record detail view.

Managing Roles and Permission Groups

Role and Permission Group Management helps administrators to configure security on the Conga Platform. A role represents a profile (e.g. system admin, contract facilitator, general user, etc.). Administrators can create user roles that contain a set of permissions with specific access to objects, records, pages, and administrative functions in applications that are built on the Conga Platform. You can either use the User Interface or REST APIs as per your business needs.

The following User Management APIs can be used for Role and Permission Group management:

- [Role Admin](#)
- [Permission Groups](#)
- [Object Permission](#)

Select one of the following topics for more information on Role and Permission Group management:

- [Understanding Role-Based Access Control](#)
- [Creating Permission Groups](#)
- [Working with Permission Groups](#)
- [Creating Roles](#)
- [Working with Roles](#)

Understanding Role-Based Access Control

The Conga supports role-based access control (RBAC) to restrict access to various applications and data within the Conga Revenue Lifecycle Platform. Conga RBAC supports data access through the following primary means of enforcement:

- **Object Permissions (OP):** An Object Permission defines different levels of access or restrictions for a user on a given object. A user can have object permissions through Permission Groups. We can allow/restrict a user to view or modify all the instances of an object via object permission. If a user is restricted from viewing and modifying object records, we can still allow access to some of the instances through Scope Permissions. We can further control whether the user has access to perform certain actions (standard actions like create, read, update, delete, or custom actions like generate, activate etc.) through Action Permissions. Both scope and action permissions are part of object permissions.

- **Permission Group:** Permission Group is a collection of Object Permissions. Permission groups can be assigned to individual users or roles. A permission group is not a separate physical object but rather a label/tag which can be assigned to object permissions. So object permissions having the same permission group label can be assumed as part of that permission group. Object permission must not belong to more than one permission group.
- **Role:** The role represents a profile (e.g. system admin, contract facilitator, general user etc.). A role will contain at least one permission group; however, it can be extended to have multiple permission groups depending on the use case.
- **User:** The user is an individual identity that will have predefined access to the system depending on which role it belongs to. A user can have only one role but can be assigned additional permission groups if needed. So the user will be getting at least one permission group through the assigned role. User access will be evaluated as a union of all the object permissions obtained through permission groups.
- **Access resolution at Runtime:** A user gets different permissions through role and permission groups assigned to it. When a user logs in to the application, the role of the user is resolved through which the associated permission group is determined. Users may have additional permission groups assigned. User permissions are evaluated as a union of all object permissions coming from all the permission groups. For any given object, the user's permissions are resolved as per the steps below. Important to note here is, one record in ObjectPermission contains access details of one object for a permission group.
 - a. To evaluate the user's permission on any object, start by checking *ViewAll* and *ModifyAll* attributes in object permission. If these attributes are true, the user has full access to all the instances of the object. If only *ViewAll* is true, the user can access all the object records but can't create, update, or delete the records. *ModifyAll* can't be true if *ViewAll* is false.
 - b. If both the attributes are false, the user has no access to any object records by default. We can however give access to some of the records through scope configurations. We have different levels of scope configurations as part of the *ScopePermissions* attribute in ObjectPermission.
 - i. **Global Scope:** Through the global scope, Admin can allow users to access object records based on some criteria. For example, we can configure access to all the agreements that are non-confidential.

```

"ScopePermissions": {
  "GLOBAL": "Account.Name='Conga' AND RecordType='MSA'",
  "USER": [],
  "ACCCOUNT": "",
  "CONTACT": ""
}

```

```
}

```

- ii. **User Scope:** The admin can allow the user to access a record if a user is tagged as an attribute value on the object. For example, a user can access an agreement if he is the contract facilitator of the agreement. The contract facilitator will be an attribute in Agreement object. We can also have additional criteria similar to Global scope.

```
"ScopePermissions": {
    "GLOBAL": "",
    "USER": [{"RelationshipFieldName": "ContractFacilitator",
"Criteria": "Account.Name='Microsoft'"}],
    "ACCCOUNT": "",
    "CONTACT": ""
}
```

- iii. **Owner Scope:** If a user is owner of any record, he will have access to the record automatically.
- iv. **Participants and Child Scope:** A user can be added manually as a participant in an object record or can have access to a record through child scope. Both of these scopes are enabled using Object sharing. In order to make an object shareable, we need to set the *IsShared* flag to true while defining the Object. To store the shared records for an object, we need to create a new object with the naming convention as [ObjectName]_UserShare (e.g. Agreement_UserShare). Any application-specific process like eSignature can create entries in the Agreement_UserShare object so that recipients can access the agreement record shared with them. New entries can be created manually also to enable participant sharing. We can also configure the access level for the shared records. We can set the value as 0 for read-only access and 1 for edit access.

```
{
  "Id": "4c2a762c-3242-4768-89ab-a39aeefe1734",
  "Name": "4c2a762c-3242-4768-89ab-a39aeefe1734",
  "ObjectId": "3D9939AF-A298-EA11-86E9-2818786A0810",
  "UserId": "02631c5b-b1b9-4a5e-b7e5-9f5805e69536",
  "AccessLevel": 0,
  "CreatedDate": "2021-07-21",
  "ModifiedDate": "2021-07-21",
}
```



```

    "CreatedBy": { "Id": "802e9a13-5e5b-4c96-92ab-820cf385b620",
    "Name": "System Admin" },
    "ModifiedBy": { "Id": "802e9a13-5e5b-4c96-92ab-820cf385b620",
    "Name": "System Admin" }
  }

```

- c. The user can perform different actions on an object record through the standard CRUD actions and we can have custom object-specific actions as well. For example, we have some lifecycle actions like GENERATE, ESIGN, ACTIVATE, AMEND etc. for Agreement objects apart from standard CRUD operations. Admin can perform all these actions on an object that is defined as part of the *ActionPermissions* attribute in *ObjectPermission*. The user can perform an action only if that action is enabled in the object permission record associated with the user. We can also have criteria-based action permission and the same can be configured as part of action permission.

```

"ActionPermissions": {
  "CREATE": {
    "Standard": true,
    "Enabled": true,
    "Criteria": ""
  },
  "UPDATE": {
    "Standard": true,
    "Enabled": true,
    "Criteria": "Account.Name='Conga'"
  },
  "DELETE": {
    "Standard": true,
    "Enabled": false,
    "Criteria": ""
  },
  "READ": {
    "Standard": true,
    "Enabled": true,
    "Criteria": ""
  },
  "GENERATE": {
    "Standard": false,
    "Enabled": true,
    "Criteria": ""
  },
}

```

```

    "AMEND": {
      "Standard": false,
      "Enabled": true,
      "Criteria": ""
    },
    "RENEW": {
      "Standard": false,
      "Enabled": true,
      "Criteria": ""
    }
  }
}

```

For more information on how to work with Roles and Permission Groups, see [Creating Roles](#), [Creating Permission Groups](#), [Working with Roles](#), and [Working with Permission Groups](#).

Creating Permission Groups

A Permission Group is a group of Object Permissions. Permission groups can be assigned to individual users or roles. A permission group is a label/tag that can be assigned to object permissions rather than a separate physical object. As a result, object permissions with the same permission group label can be assumed to be part of the same permission group. Object permission cannot be granted in more than one permission group.


An Object Permission specifies the various levels of access or restrictions that a user has on a given object. Using object permission, you can allow or restrict a user from viewing or modifying all instances of an object.

If a user is restricted from viewing and modifying object records, you can still grant access to some instances via **Scope Permissions**. Through **Action Permissions**, you can further control whether a user has access to perform specific actions (standard actions like create, read, update, delete, or custom actions like generate, activate, and so on). Object permissions include both Scope and Action Permissions.


For any given object, the user's permissions are considered to access the application as per the steps below:

1. **Object Permissions:** To evaluate the user's permission on any object, *View All* and *Modify All* attributes in object permission are used. If these attributes are true, the user has full access to all the instances of the object. If only *View All* is true, the user can access all the object records but can't create, update, or delete the records. *Modify All* can't be true if *View All* is false.

2. **Action Permissions:** In addition to the standard CRUD actions, you can assign custom object-specific actions. Aside from standard CRUD operations, we have some agreement lifecycle actions like GENERATE, ESIGN, ACTIVATE, AMEND, and so on for Agreement objects. Using the *Action Permission* option, you can assign any or all of these actions.
3. **Scope Permissions:** By default, if both (*View All* and *Modify All*) object permission is not set, the user cannot access any object records. However, you can grant **READ** access to some records using scope configurations. The following are the two levels of scope configuration that you can set:
 - **Global Scope:** Allow users to access object records based on some criteria. For example, you can configure access to all the agreements that are non-confidential.
 - **User Scope:** Allow users to access a record if the user is tagged as an attribute value on the object. For example, a user can access an agreement if he is the contract facilitator of the agreement. The contract facilitator should be an attribute in Agreement object.

 The relationship field must be a lookup field that is indexed, and the *Lookup Object Name* must be the User object.



To create a Permission Group

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **User Management**.
3. Go to the Permission Groups tab and click **Add New**.
4. Enter values in the following fields.


Field	Description
Display Name	Enter the display name that is displayed in the list view.
Value	Enter the value.
Description	Enter a description of the permission group.


5. Click **Save**.

You can see the newly created permission group in the list view.


 To delete the Permission Group, Click the More () icon at the start of the record and click **Delete**. If the respective Permission Group is assigned to any User or Role, you will receive the validation message and will be unable to delete it.

To assign Object Permission

1. Click the permission group name link from the list page, or click the more () icon at the start of the record and click **Edit**.
2. On the Object Permissions tab, click the **Add Object Permissions** button.
3. Select the required CRUD option for the Object(s):
4. Click **Create bulk object permissions**.
5. If needed, click the **Set** option in the Criteria column to add access criteria to any of the specific objects.
6. If needed, click the **Set** option in the Action Permissions column to add any custom object-specific actions.

 To delete the Object Permissions, select the object(s) from the list and click the **Delete Object Permissions** button.

To add Scope Permissions

1. Click the permission group name link from the list page, or click the more () icon at the start of the record and click **Edit**.
2. Go to the **Global Scope** or **User Scope** tab.
3. Set the criteria and click **Apply**.

Working with Permission Groups

After you create a Permission Group, you can view, update, or delete it from the list page. You can also search for specific records in the grid by performing a keyword search. For more information, see [Filtering Records](#).


To view the permission group information, click the **Permission Group Name** link from the Permission Groups list page.

To edit a permission group

1. Click the permission group name link from the Permission Groups list page, or click the More (⋮) icon at the start of the *permission group* record and click **Edit**.
2. Make the necessary changes as per your business needs. Changes are automatically saved, and a confirmation message is displayed.

To delete a permission group

1. Click the More (⋮) icon at the start of the role record.
2. Click **Delete**.
3. From the confirmation dialog, click **Confirm**.

 If the respective Permission Group is assigned to any User or Role, you will receive the validation message and will be unable to delete it.


Creating Roles

Roles determine a given user's access to objects and records, and permissions to perform actions in the Conga Revenue Lifecycle Platform. A role is assigned to users performing similar tasks and consists of a set of permissions. As an administrator, you can assign roles to the existing users or create a new user and edit the user details to assign roles.


Based on your organization's security, legal, functional, and administrative requirements, some examples of the roles you can create include: Contracts Facilitator, Contracts Read Only, Global Legal User, Quote Administrator, and so on. As an administrator, you can create roles to restrict access to data for certain users based on their functional roles and responsibilities.

You can create a new role or clone an existing one with the closest match, saving you time to start from scratch.

To create a new role

 You can also create a new role by cloning a role with the closest match. Conga recommends cloning an existing role to save time. For more information on cloning the existing role, see the next section.


1. Log in to the Conga Platform as an admin user.

2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **User Management**.
3. Go to the Roles tab and click **Add**.
4. Enter values in the following fields.

Field	Description
Name	Enter a unique name for the role.
Description	Enter a description of the role.
Permission Groups	Select permission group(s) from the list. Permission Groups determine a given user's access to objects and records, and permissions to perform actions in the Conga Revenue Lifecycle Platform. For more information on permission groups, click here .
Admin Permissions	Select admin permission(s) from the list. Users associated with the designated role and permission group(s) can perform the actions you select from the Admin Permissions dropdown.

5. Click **Save**.

To clone a role

1. Click the More () icon at the start of the role record.
2. Click **Clone**. The Clone Role popup appears.
3. Enter the unique name for the new role.
4. Click **Save**.

Working with Roles

After you create a role, you can view, edit, clone, and delete the role from the list page. You can manage column width, which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing View Settings](#) and [Filtering Records](#).

To view the role information, click the **Role Name** link from the Roles list page.

To edit a role

1. Click the role name link from the Role List page, or click the More (⋮) icon at the start of the role record.
2. Click **Edit**.
3. Make the necessary changes.
4. Click **Save**.

To delete a role

1. Click the More (⋮) icon at the start of the role record.
2. Click **Delete**.
3. From the confirmation dialog, click **Confirm**.

- Deletion is irreversible. Roles once deleted cannot be recovered.
- If any user is assigned the role, you will receive a validation message and will be unable to delete it.

Managing Users

User Management enables system administrators to create and manage users, and their access levels on Conga Revenue Lifecycle Platform. It provides all typical management controls of users like creating, modifying, and deleting users. Apart from this, administrators can also control their access to the services through permissions. You can use the user management user interface or REST APIs to manage the users on Conga Revenue Lifecycle Platform as per your business needs.

The following User Management APIs can be used for user management:

- [User Admin](#)
- [Role Admin](#)
- [User](#)

Select one of the following topics for more information on the options and actions available on the user interface:

- [Adding and Activating Users](#)
- [Working with Users](#)
- [Importing Users](#)
- [Managing View Settings](#)

- [Filtering Records in the Grid View](#)
- [Managing Views](#)


Adding and Activating Users

You can manage users of the Conga Platform using the **User Administration** user interface tool (Users). The Users tab allows you to:


- Create, update, and manage users.
- Import user information.
- Assign roles to users.
- Set default options for users. For example, locale, timezone, date and time format, and other preferences.

To create a new user

✓ You can also create a new user by cloning a user with the closest match. Conga recommends cloning an existing user to save time. For more information on cloning the existing user, see the [Working with Users](#) section.


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **User Management**.
By default, a list of users is displayed.
3. Click **Add** to add a new external user, or click **Add Guest** to add a new guest user.
The User Details screen appears.
4. Enter values in the following fields.

i Depending on the type of user you are creating—an external user or a guest user—the fields on the screen vary.

Field Name	Description
ExternalId	<p>Enter the user's external ID. This can be any unique alphanumeric text used to identify the user. This ID is used when migrating users from one environment to another.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> The SFDC IDP user's unique Salesforce ID must be added as an external ID on the RLP.</p> </div>
FirstName	Enter the user's first name.
LastName	Enter the user's last name.
Email	Enter the user's email address.
Role	Enter the keyword to search and select the appropriate role to be assigned to a new user. A role is assigned to users performing similar tasks and consists of a set of permissions.
Permission Groups	Select permission group(s) from the list. Permission Groups determine a given user's access to objects and records, and permissions to perform actions in the Conga Revenue Lifecycle Platform. For more information, see Managing Roles and Permission Groups .
Time zone	Enter the keyword to search and select the time zone from the list.
Locale	Enter the keyword to search and select the locale from the list.
Currency	Enter the keyword to search and select the currency from the list.
IsActive	Enable this toggle to make the user active. You can activate the user later whenever required. For more information, see To activate or deactivate the user .
IsSuspended	Enable this toggle to mark the user as suspended.

Field Name	Description
Alias	Enter the user's alias name.
Language	Enter the user's language. For example, en-IN.
Addresses	Enter the user's full address.
Phone Number	Enter the user's phone number.



5. Click **Save**.

 The Conga IDP user receives a Welcome email that includes the username, the first-time login password, and organization information. The user can generate a new password using the default first-time login password.

Activating or Deactivating Users

As an administrator, you can activate or deactivate existing users from the user details page. Apart from the admin user, only those users can perform activation or deactivation whose roles have access to Activate and Deactivate action. A deactivated user cannot log in to the Conga Platform Administration portal.

To activate or deactivate a user

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **User Management**
A list of users is displayed.
3. Click the More () icon next to the user name and select **Activate** or **Deactivate**.

On successfully activating a user, the value of the **IsActive** field changes to *Yes*.

Getting Salesforce User ID

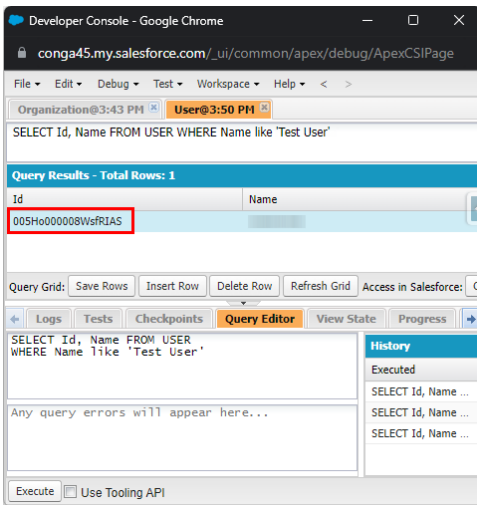
The Salesforce User ID is the unique identifier for your Salesforce user identity. Use the steps below to find it.

Salesforce Lightning:

1. Click the Gear icon available at the top right corner of the screen.
2. Select **Developer Console**. The Developer Console window opens.
3. Go to the Query Editor tab.
4. Enter the following query and click the **Execute** button.

<p>To get all user's ID (18 digit) and Name</p>	<pre>SELECT Id, Name FROM USER</pre>
<p>To get specific user ID (18 digit)</p>	<pre>SELECT Id, Name FROM USER WHERE Name like 'user name'</pre>

You can see the 18 digit user ID as a result of the respective query.



Working with Users


After you create a user, you can view, edit, and clone the user from the list page. You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more

advanced filters and filter logic. For more information, see [Managing View Settings](#) and [Filtering Records](#).

To view the user information, click the **User Name** link from the User List page.

To edit a user

1. Click the user name link from the User List page, or click the More (⋮) icon at the start of the user record.
2. Click **Edit**. The User Details page appears in the edit mode.

 For Conga IDP organization users, the external ID field remains read-only, and only Conga IDP organization users can update it. Salesforce IDP users must add their unique Salesforce ID as an external ID. A user with an incorrect external ID cannot access the Conga platform application.

3. Make the necessary changes.
4. Click **Save**.

To clone a user

1. Click the More (⋮) icon at the start of the user record.
2. Click **Clone**. The Clone User popup appears.
3. Enter the user's external ID. This can be any unique alphanumeric text used to identify the user.
4. Click **Save**.


Importing Users

Using bulk import, you can import users from the external data source to the Conga Platform. You can only import new users and not update existing users using the import feature. For uploading users from an external data source you must use the valid CSV file.

 Only an administrator has the privilege to import users into the Conga Platform.

To import users

1. Log in to the Conga Platform as an admin user.

2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **User Management**.
3. From the Users list page, click **Bulk Import**.
The Bulk Import popup appears.
4. Click **Download "upload_file_format_csv"** to download the sample template file.
5. Open the CSV file and add the import data.
6. Drag and drop or Browse the **updated CSV file** into the Bulk Import popup.
7. Click **Upload**.

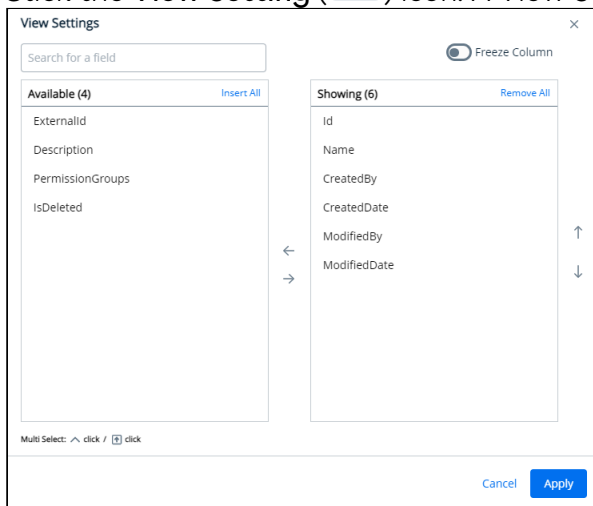
The system first runs validation on the uploaded file. If the validation fails, you'll see an error message. If there are no errors in the file, the users are successfully imported.



Managing View Settings

View Setting allows you to control which columns are displayed in the grid, freeze/pin a column range, rearrange the column order, and change the column width by resizing the necessary columns. You can then save your filtered view of a record and set it as the default view, so there is no need to reselect the filters and rearrange the column every time you open the Grid View (List View). For more information, see [Managing Views](#).

To add or remove columns from the grid


1. Click the **View Setting** () icon. A View Settings dialog box appears.




2. To remove a column from the grid, highlight it in the right section and click the minus-sign () icon.
3. To add a column to the grid, highlight it in the left section and click the plus-sign () icon. You can use the search box available above the section to search for a specific field.


4. To add or remove more than one column, use Ctrl-Click or Shift-Click to highlight the columns, then click **Add/Remove Selected Fields** (left and right arrows).
5. To add or remove all columns, click **Insert/Remove All**.
At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

To rearrange columns in the grid

1. Click the **View Setting** () icon to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

To freeze/pin columns

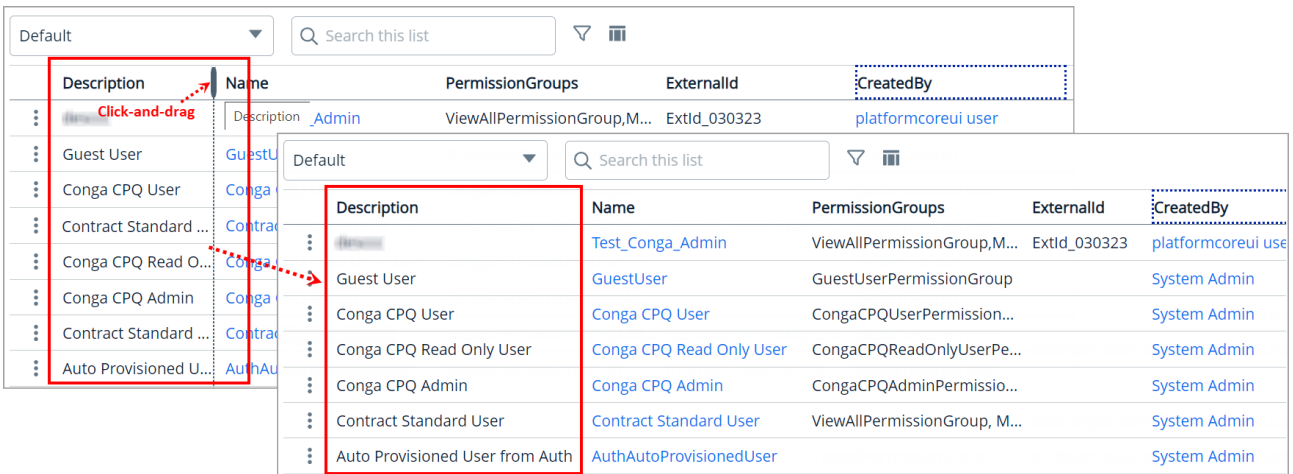
 When four or more column items are added to the showing panel, you can enable the **Freeze Column** toggle.

1. Click the **View Setting** () icon to open the View Settings dialog.
2. Enable the **Freeze Column** toggle. You can see two sliders (one at the top after the first column and the second at the last).
3. Click and drag the top and bottom sliders to define the range of visible columns to be pinned.
4. Click **Apply** to close the dialog and apply view settings to the grid.

To resize the column width

1. Navigate to the column for which you want to resize the width.
2. Click and drag the edge of the column.

You can resize columns, but not rows. Columns don't retain their sizes, so the next time you open the list page you will have to resize the column again.



Filtering Records in the Grid View

You can filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. You can then save your filtered view of a record and set it as the default view, so there is no need to reselect the filters every time you open the Grid View (List View). For more information, see [Managing Views](#).

i After applying a column filter, if the user tries to apply a Keyword or Advance Search, the column filter criteria will not be retained, and the result will be displayed based on the Keyword or Advance Search.

To filter records by keyword

1. Place your cursor in the search bar (at the top of the grid) and enter a keyword search term.
2. Click the search icon or press Enter to filter the records by keyword.

The grid refreshes to show the filtered list—columns that have the keyword filter applied to them.

To filter records using advanced search

1. Click the **Advanced Search** () icon to open the filter dialog.

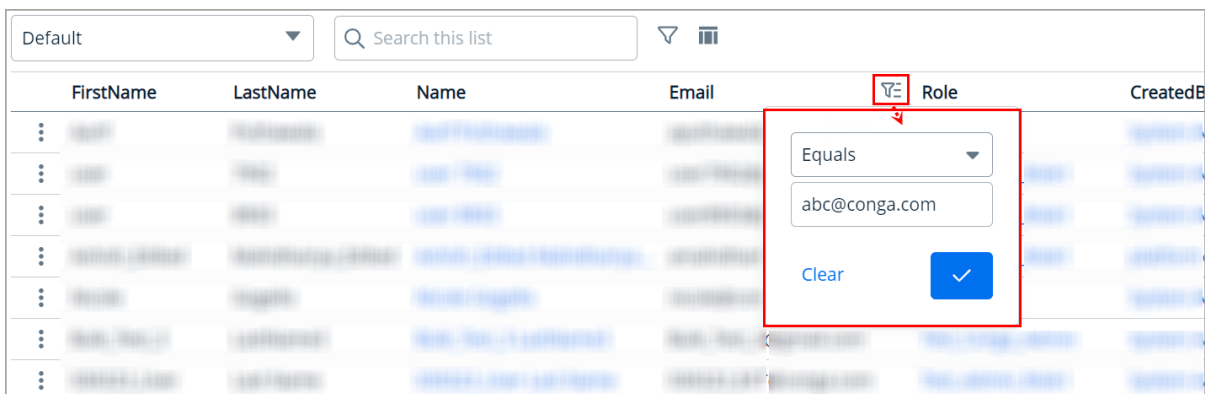
- To specify the filter criteria, create simple or complex queries by entering values in the following fields.

Field Name	Description
Field	Select a field to be used in the filter criteria.
Operator	Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
Value	Enter the value of the field. The type of value fields depends on the field selected.

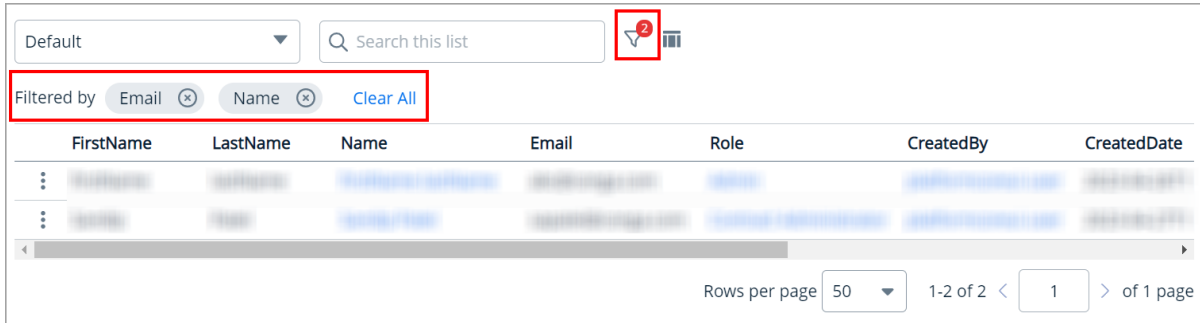
- To add another filter criteria, click **Add Criteria** and repeat step 2.
By default, two or more rows share an AND (Boolean operator) relationship.
- To specify the filter logic between multiple rows, enable the **Logic** toggle.
- Specify your logic in the *Filter Logic* field. The supported filter logic operators are **AND** and **OR**. Use parentheses to set the order of operations.
For example, if you have five rows, you can create a filter logic such as: (((1 AND 3) OR (2 AND 4)) AND 5).
- Click **Apply** to filter the list of records based on the criteria you defined.

To filter records by column

- Click or mouse hover on a column name and click the **Filter by** (🔍) icon to display the drop-down controls.
- Select an operator from the **Select an option** drop-down.
- Enter or select the value to filter the records by the specified column value.
- Click the **Apply** (✓) button.



When you apply the advanced search or column-level filters, you can see the applied filters at the top of the grid as well as the total number of applied filters next to the *Advanced Search* icon. You can remove a single filter by clicking the cancel icon next to the filter name, or you can remove all filters by clicking the **Clear All** button.

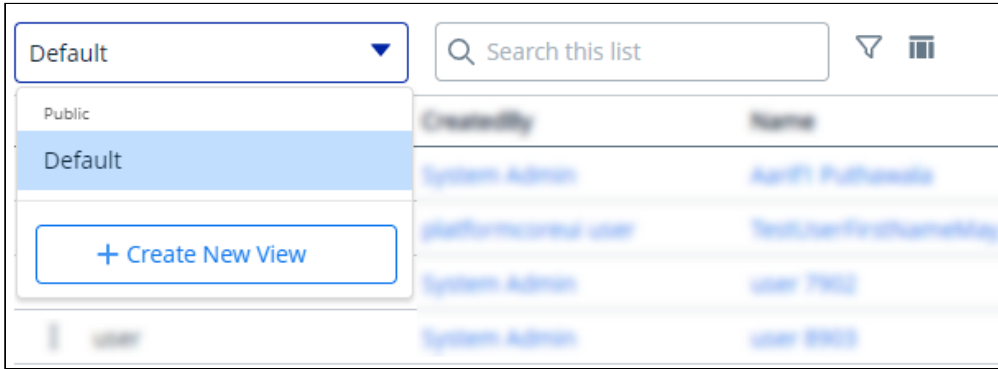


Managing Views

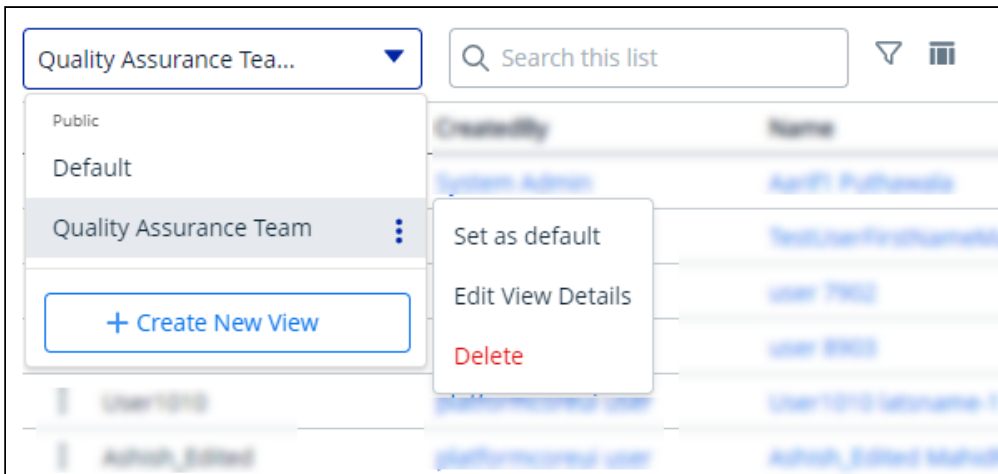
The Conga Platform application allows you to save your filtered view of a record and set it as the default view, so there is no need to reselect the filters every time you open the Grid View (List View). Only you can see that saved view and others will see the default view or their own saved view.

To save your personalized view

1. Log in to the Conga Platform as an admin user.
2. Navigate to the page containing the grid view you want to filter.
3. Use the filtering options available to define the criteria for your filtered view. This might involve selecting specific fields, setting conditions, and choosing values for those conditions. For more details, see [Filtering Records in the Grid View](#).
4. Apply the view setting to control which columns are to be displayed in the grid view. For more details, see [Managing View Settings](#).
5. Navigate to the dropdown menu next to the search bar and click **Create New View**. The *Save View* popup appears.



6. Enter a Name and Description for your view, and click **Save** to save your filtered view.
7. To access your saved view, click the dropdown menu next to the search bar.
8. Click the More (⋮) icon for the respective View from the list and select **Set as default**.



The Grid View should update and display the records based on the saved filter criteria.

To edit a saved view

1. Click the More (⋮) icon for the relevant View from the list and select **Edit**.
2. Make the necessary changes.
3. Click **Update**.

To delete a saved view

1. Click the More (⋮) icon for the relevant View from the list and select **Delete**.
2. From the confirmation dialog, click **Confirm**.

Managing Email Templates

The Conga Templates admin user interface allows users with access to configure email templates to send emails with consistent standard verbiage and format. Email templates can be customized using static text and entity fields from Conga objects to display data dynamically. You can use the templates user interface or [REST APIs](#) to manage email templates on the Conga Revenue Lifecycle Platform as per your business needs. The template list page lists the available email templates.

Setting Up Organization-Wide Email Address

The organization-wide email address allows you to associate an email address to user profiles. When you assign an organization-wide email address for all the user profiles or selected user profiles, users can use the common email address while sending emails. You can set up multiple organization-wide email addresses, but you can use only one organization-wide email address to send emails. When an organization-wide email address is not set up then the logged-in user email address is used to send emails.

Prerequisites

The administrator must set the *Email Application Configuration* using the following [Configuration API](#).

POST https://<URL_of_the_Instance>/api/config-management/v1/configurations

Sample payload:

```
{
  "Category": "OrganizationEmailService",
  "Name": "ApplicationEmailConfig",
  "Value": "{\\"EnableOrganizationWideEmailAddress\\":true,
  \\"OrganizationWideEmailConfig\\":{\\"EmailAddress\\":{\\"Address\\":\\"test@conga.com\\",
  \\"DisplayName\\":\\"Conga Care\\"},\\"Description\\":\\"Conga customer          Care\\"},
  \\"OrganizationWideEmailAddresses\\":[{\\"EmailAddress\\":{\\"Address\\":
  \\"test@conga.com\\",\\"DisplayName\\":\\"Conga Care\\"},\\"Description\\":\\"Conga customer
  Care\\"}],\\"EnableComplianceBCCEmail\\":true,\\"ComplianceBCCEmailAddress\\":
  {\\"Address\\":\\"test1@conga.com\\",\\"DisplayName\\":\\"Bcc Compliance\\"}}}"
}
```

Using Email Templates in Your Organization

Email templates are primarily used in the business process workflows that **send an email based on an action**. For example, email templates can be used for sending emails for various events like sending a document for review or signatures, sending invoices to billing account contacts, and sending invoice and credit memo emails.

When creating an email template, the following standard workflow is recommended.

1. Create the email template.
2. Preview the email template.
3. Edit the email template.

You can also **clone** and **delete** email templates as needed. Select one of the following topics for more information:


- [Creating Email Templates](#)
- [Working with Email Templates](#)

Creating Email Templates

The Conga Templates admin user interface allows you to create email templates using **plain text** or **HTML**. You can also include **merge fields**, which represent an entity or its fields that can be dynamically populated when an email is sent.

A merge field is dynamic data that is evaluated when an email using the corresponding email template is sent to a recipient. Merge fields are specific to the context object defined in the email template and can be used as a placeholder for the object itself, or one of its fields or lookup fields. Merge fields are added to the email template body using this format: `{{Merge Field}}`. For example, `{{Assigned.To.Name}}`. You can retrieve the list of fields for any object using the appropriate Email Template API (refer to the [Conga Email APIs](#)).

To create a new template

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Templates**.
3. From the Email Template list page, click **Create New Template**.
The Template Settings screen appears.
4. Enter or select values in the following fields.

Field	Description
Template Name	Enter a name for the email template.
Description	Enter a description for the email template.
Template Type	Select the template type as <i>html</i> or <i>text</i> .
Object Name	Select the object to associate with the email template.
Access Type	Select the template access type as <i>public</i> or <i>private</i> .
Subject	Enter the subject of your email.

5. Click **Save**.





The email template is created and you are redirected to the edit mode, where you can add and update the template details. You can also add the merge field using JSON Data and Master Objects. For more information, see [Working with Email Templates](#).

Working with Email Templates

After you create an email template, you can view and edit the email template from the email templates list page. From this page, you can take several actions:

- View and edit the details of an email template
- Add dynamic merge fields using JSON data and Mater Objects
- Preview an email template
- Clone an email template
- Delete an email template

To view an email template, click the template name from the email templates list. By default, it opens in edit mode. You can search for the template using the **template name** or **access type (private or public)**.

 When in edit mode, select the **Home** () icon to go to the Admin Home page, the **Back** () icon to go back to the *previously visited* page, and the **History** () icon to see the history and click on any of the history entries to view that page directly.

Taking Actions on Email Templates


You can take the following various actions on existing email templates.

To edit an email template

1. Click the template name from the email templates list, or click the More (⋮) icon for the relevant email template from the list and select **Edit**.
2. Make the changes to the email template body.
3. Click **Save**.
4. Click **Preview** to review the template changes.

To add JSON data merge fields


1. Click the template name from the email templates list, or click the More (⋮) icon for the respective email template from the list and select **Edit**.
2. Click **Merge Field Lookup**.
3. Click **Add JSON Data**.
4. Copy and paste your **JSON data** and click **Populate Merge Data**.

 The **Populate Merge Data** button will only be enabled if you have valid JSON data. The validation message is also visible at the bottom of the text area box.

5. Select either **Display merge fields as text only** or **Display with merge field syntax** as per your business use case.
6. Select the **Merge Field Types** (either Single Merge Fields or Table Data) as per your business use case.
7. Click the Copy (📄) icon to copy the field and paste it into the email template body.
8. Click **Preview** to review the template changes.
9. Click **Save**.

To add master object merge fields

1. Click the template name from the email templates list, or click the More (⋮) icon for the respective email template from the list and select **Edit**.
2. Click **Merge Field Lookup**.
3. Go to the Master Objects tab.
4. Click the dropdown next to any object listed to see a list of the available fields.


5. Use the Search bar to find a specific object.
6. Click the Copy () icon to copy the field and paste it into the email template body.
7. Click **Preview** to review the template changes.
8. Click **Save**.


To clone an email template

1. Click the More () icon for the respective email template from the list.
2. Select **Clone**.

The template will be cloned with the same name.

To delete an email template

1. Click the More () icon for the respective email template from the list.
2. Select **Delete**.
3. From the confirmation dialog, click **Confirm**.

 Do not delete an email template if it is associated with one or more business rules or actions.

Managing Data Sync

The Data Sync feature serves as a vital tool when you need to synchronize data from your existing Salesforce system to the Conga Platform. This feature offers the capability to seamlessly sync your data, ensuring that your information is up-to-date and accessible within the Conga Platform.

Below are the supported features in data sync:

- One-time sync from Salesforce to Conga Platform
- Delta data sync from Salesforce to Conga Platform
- Real-time sync data from Conga Platform to Salesforce


Navigating to the Data Sync User Interface

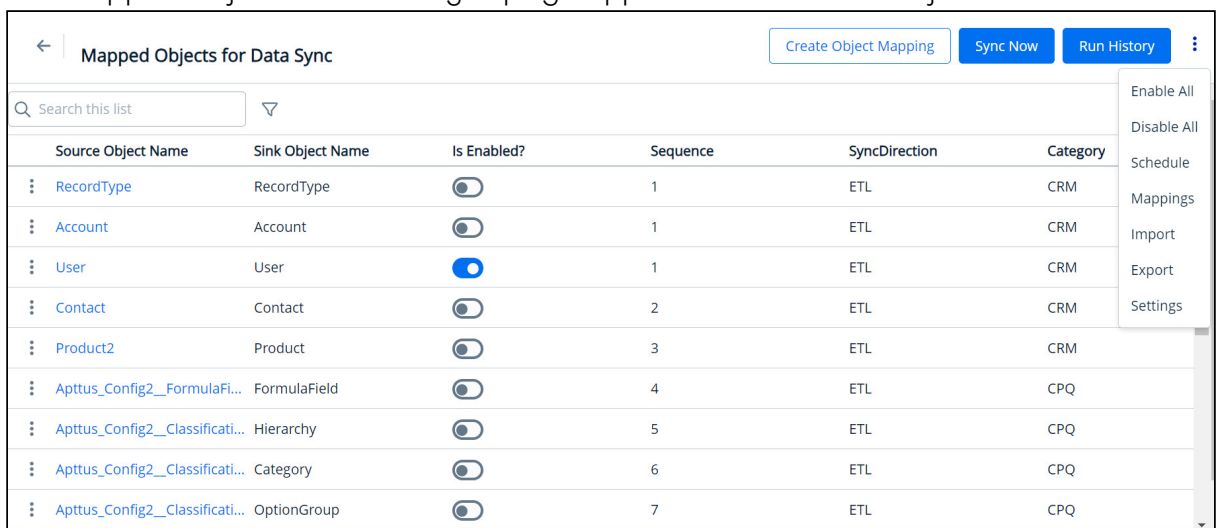
The Data Sync user interface allows administrators to seamlessly manage, modify, and monitor the synchronization of master data between external systems and the Conga Platform. It offers a solution to synchronize master data at regular, scheduled intervals (or on-demand) ensuring that the Conga Platform stays updated with the latest information

from external sources. Administrators can also monitor the status of sync jobs, review past runs, and trigger manual sync as needed.

A key feature of this interface is its ability to map source objects to target objects, including the option to create and map new target objects if they don't exist. During object creation, default target fields are automatically generated, and source fields can be easily mapped to corresponding target fields.

To open the Data Sync UI:

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**. The Mapped Objects for Data Sync page appears with a list of objects.



Source Object Name	Sink Object Name	Is Enabled?	Sequence	SyncDirection	Category
RecordType	RecordType	<input type="checkbox"/>	1	ETL	CRM
Account	Account	<input type="checkbox"/>	1	ETL	CRM
User	User	<input checked="" type="checkbox"/>	1	ETL	CRM
Contact	Contact	<input type="checkbox"/>	2	ETL	CRM
Product2	Product	<input type="checkbox"/>	3	ETL	CRM
Apttus_Config2_FormulaFi...	FormulaField	<input type="checkbox"/>	4	ETL	CPQ
Apttus_Config2_Classificati...	Hierarchy	<input type="checkbox"/>	5	ETL	CPQ
Apttus_Config2_Classificati...	Category	<input type="checkbox"/>	6	ETL	CPQ
Apttus_Config2_Classificati...	OptionGroup	<input type="checkbox"/>	7	ETL	CPQ

Overview of the Data Sync UI


The Data Sync Admin UI comprises the following features to streamline your data synchronization process:

- **Setting:** Configure the data sync infrastructure.
- **Create Object Mapping:** Define the rules and mappings for transferring data between objects.
- **Sync Now:** Perform on-demand data sync manually.
- **Run History:** View data sync run history and associated error messages. The page displays a list of data sync IDs and other information, including whether or not the sync was successful. You can click on an entry in the run history to view any error messages or other details that are provided.
- **Import and Export Objects:** Import objects from external systems or export objects in JSON format.

- [Schedule Data Sync](#): Set and schedule master data to be synced at specified intervals.
- [All Object Mappings](#): View a list of imported external system objects and perform source-to-target mapping from a single screen.

Getting Started with Data Sync

After your organization and admin user have been onboarded, the next step is to synchronize data from the source system to the Conga Platform. Before initiating the data synchronization operation, it is crucial to establish a seamless connection between the source and target systems. This section provides comprehensive guidance on the essential configurations needed to successfully establish this connection.

 Only Salesforce (source system) is supported for Data Sync in this release.

You may come across source object fields that utilize formula expressions to serve their purpose (for example, calculating the net price of a line item using the formula `SalesPrice * Quantity`). These source formula expressions might be written differently or in a format incompatible with the formula expressions supported by the Conga Platform. To ensure smooth synchronization, it is essential to convert these source formula expressions into a format compatible with the Conga Platform. Therefore, after configuring the data sync infrastructure, you must transform the formula expressions. For more information on transforming formula expressions, see [Creating Formula Fields](#).

Prerequisite

Currently, the seeded user role name is modified in Role Configuration and that will cause the user sync process to fail. You must run the following API with the given payload to resolve the user sync issue:



API URL: `/api/datasync/v1/settings/default-role`

Payload

```
{
  "RoleId": "17b1f1ae-3578-423a-9f43-a27f5a7ff46f",
  "RoleName": "GuestUserRole"
}
```

i The role name that is provided in the payload is the default role that comes with the system, but you can change it if you want to. To do this, you need to acquire the Role ID and Role Name from the Role Listing page.

To configure data sync infrastructure

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**.
3. Click the More () icon on the Data Sync UI and then click **Settings**. The Settings page is displayed.
4. Configure the Salesforce, Platform, Postgres, and Custom Settings by following the below steps:

⚠ Prerequisite

You must first enable the **OAuth Username-Password Flows** configuration in your Salesforce org, as shown below:

- a. Log in to the salesforce org as an administrator.
- b. Navigate to **Setup > Identity > OAuth and OpenID Connect Settings**.
- c. Enable the **Allow OAuth Username-Password Flows** toggle.

Salesforce Settings

Go to the Salesforce Settings tab and enter values in the following fields.

Field	Description
Username	Enter your Salesforce account username.
Password	Enter your Salesforce account password.
Token URL	Enter the token URL. You may use either a sandbox or production instance URL to access the OAuth2 token service. <ul style="list-style-type: none"> • Sandbox URL: https://test.salesforce.com/services/oauth2/token • Production URL: https://login.salesforce.com/services/oauth2/token

Field	Description
Secret	<p>Enter the Security Token here.</p> <p>To get the secret, you must begin by resetting the security token associated with the Salesforce account. After the security token is reset, the new security token will be sent to the email address specified in the Salesforce personal settings. For step-by-step instructions on resetting the security token, see Reset Your Security Token.</p> <p>If you are unable to see the option to reset your security token, see Troubleshooting.</p>
Client ID	<p>Enter the Consumer Key generated after creating the Connected App. For more information on creating a connected app and getting the client ID, see Create a Connected App.</p>
Client Secret	<p>Enter the Consumer Secret generated after creating the Connected App. For more information on creating a connected app and getting the client secret, see Create a Connected App.</p>
Domain URL	<p>Enter the domain URL for the Salesforce portal. We recommend using the classic URL format that ends with '.salesforce.com.' Please note that the system does not currently support URLs in the 'lightning mode' format, which ends with '.lightning.force.com'.</p> <p>For example, use https://<domainname>.my.salesforce.com/ URL instead of https://<domainname>.develop.lightning.force.com/ URL.</p>
Salesforce API Version	<p>Any version can be used, although it is advisable to mention the latest version. For more details on getting the API version information, see Find Salesforce Edition and API version.</p>

Platform Settings

Go to the Platform Settings tab and enter values in the following fields.

Field	Description
Client ID	Enter the client ID generated after creating the API to API connection. For more information on getting the client ID, see Conga API Connections .
Client Secret	Enter the client secret generated after creating the API to API connection. For more information on getting the client secret, see Conga API Connections .
Token URL	Enter the Conga Platform token URL.

Postgres Settings

Go to the Postgres Settings tab and enter values in the following fields.


Field	Description
Server Name	Enter the network hostname or the IP address of the PostgreSQL server you intend to connect to.
Port Number	Enter the network port on which the PostgreSQL server is running. The default port for PostgreSQL is 5432.
Username	Enter the database username to establish the connection. Note that this username is assigned by a system administrator and is also associated with specific roles and permissions.
Password	Enter the PostgreSQL password that corresponds to the username you have specified.

Custom Settings

Go to the Custom Settings tab and select the desired option to sync certain application-specific settings. A confirmation window appears. Click **Yes**.

The application allows you to sync the following settings:

App-Specific Sync Options	Description
CPQ Flows	Flows are groups of pages that are assigned to each step in the CPQ process.
CPQ Displays	Holds information about fields displayed in installed product view.
CPQ Actions	Holds information about custom actions displayed in the installed product view
CPQ Custom Settings	This standard Salesforce Custom Settings page lists all the legacy custom settings you may require to fulfill your specific business requirements.
CPQ Cart Views	The public cart view created by the user.
CLM Config Settings	The application settings available in Config Settings.

 These Custom Settings are currently applicable to CPQ (Configure, Price, Quote) and CLM (Contract Lifecycle Management) users. Whenever there is an update in the above settings (flows, displays, actions, custom settings, etc.) within the source system, you must perform this activity to ensure synchronization between both systems.

Creating a Connected App

As a part of the data sync infrastructure, you must configure a Connected App in your salesforce org to generate client ID and client secret.

To create a connected app


1. Log in to the salesforce portal as an administrator.
2. Navigate to **Setup > Apps > App Manager**. The Lightning Experience App Manager page appears.
3. Click **New Connected App**.
4. Fill in the following details in the **Basic Information** section.

Field	Description
Connected App Name	Enter the connected app’s name, which displays in the App Manager and on its App Launcher tile.
API Name	The API name is generated automatically based on the name of the Connected App.
Contact Email	Enter the email address of the administrator managing the Connected App.

5. Fill in the following details in the **API (Enable OAuth Settings)** section.


Fields	Description
Enable OAuth Settings	Select this to define the OAuth settings. When you enable this field, additional settings are displayed under the API (Enable OAuth Settings) section.
Callback URL	Enter any URL of your choice, as it won't serve any specific purpose. For example, HTTP://localhost
Selected OAuth Scope	Select Full access (full) and move to Selected OAuth Scopes by clicking the Add arrow.
Require Secret for Web Server Flow	Select this to require the connected app to provide a consumer secret for authorization.

6. Leave all other fields blank. Click **Save**.

 Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

To capture Consumer Key and Consumer Secret

After you create a Connected App, the system generates a **Consumer Key** and **Consumer Secret**.

1. Log in to the salesforce portal as an administrator.
2. Navigate to **Setup > Apps > App Manager**.
3. Find the connected app, click , and then select **View**.

4. Next to Consumer Key and Secret, click **Manage Consumer Details**.
You're prompted to verify your identity using one of your registered methods.
5. To generate values for the consumer key and consumer secret, under Staged Consumer Details, click **Generate**.
Each time you generate staged values for the consumer key and secret, you overwrite the existing staged values. You can generate new staged values at any time. Staged values aren't valid until you apply them.
6. Click **Copy** next to Consumer Key and Consumer Secret.
7. Store the information for future use.

Creating Formula Fields


When syncing and mapping source objects with the Conga Platform, you may come across fields that utilize formula expressions to serve their purpose (for example, calculating the Net Price of a line item using the formula $SalesPrice * Quantity$). These source formula expressions might be written differently or in a format incompatible with the formula expressions supported by the Conga Platform. To ensure smooth synchronization, it is essential to convert these source formula expressions into a format compatible with the Conga Platform.


The Formula Fields feature provides a convenient solution for transforming source formula expressions into target formula expressions that are compatible with the Conga Platform's requirements. Additionally, you can modify the Target Field Type to ensure it aligns with RLP requirements seamlessly.


To create a target formula expression


1. Login to the Conga Platform as an Admin User.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Apps** > **Data Sync**.
3. Click the More (⋮) icon on the Data Sync UI and select **Mappings**.
The list of all mapped objects for data sync appears.
4. Click the More (⋮) icon at the start of the object for which you want to create formula expressions and select the **{ } Formula Fields** option.
The list of all source formula expressions associated with the selected object appears.




<input type="checkbox"/>	Source Field Name	Source Formula Expression	Source Field Type	Target Field Name	Target Formula Expression	Target Field Type
<input type="checkbox"/>	NameLength_c	LEN(Name)	double			
<input type="checkbox"/>	NameGreet_c	"Hello " + Name	string			

5. Select the source formula field you want to transform. When the chosen formula expression is linked to a source object that has not yet been mapped to any target object, the system will display the Action window. Enter the desired target object name and click **OK**.
6. Click the Transform () icon. The Target Field Name, Target Formula Expression, and Target Field Type are auto-populated in the RLP-compatible format.

Source Field Name	Source Formula Expression	Source Field Type	Target Field Name	Target Formula Expression	Target Field Type
<input checked="" type="checkbox"/> NameLength_c	LEN(Name)	double	NameLength_c	FN.LEN(APTestObject_c.Na...	Decimal 
<input checked="" type="checkbox"/> NameGreet_c	"Hello " + Name	string	NameGreet_c	"Hello " + APTestObject_c.N...	String

7. Go to the Target Field Type and click the Pencil icon if you want to edit it.
8. Select the source formula field and click the Validate () icon. As a result of validation, you can perform the following operations on the fields:

 The provision to generate a new field is only visible after successful validation, and the option to review the error and modify the formula becomes available when a transformation error occurs.


Icons	Description
Create Field	Click the Plus () icon to add a new formula field.
View Errors	Click the Errors () icon to view the error message.
Edit Formula	Click the Edit () icon to edit the formula expression and make corrections. For more information on how to work with a formula expression, see Formula Builder .


The newly added formula field(s) is now accessible from the Object > Object Information > Fields.

Creating and Managing Object Mappings

Object Mapping is a process of defining the relationship between objects and entities in the Conga Platform. The Object Mapping feature enables you to establish a correlation between the properties of objects and data structures.

The initial list of objects to be synced is gathered from the tenant profile and displayed on the Object Mappings page. When you need to add new objects or fields to the sync or update the existing data structure, you can do so from the Data Sync UI on the Conga Platform. When adding new objects or managing existing objects, you can also select which fields to include or exclude from the sync operation.


 You must set up your data synchronization infrastructure before object mapping. For more details on configuring data sync infrastructure, see [Getting Started with Data Sync](#).

 Mapping for many out-of-the-box (OOTB) objects for CPQ, CLM, and Approvals is part of seed data (in ROC Schema).

To create object mapping

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**. The Mapped Objects for Data Sync page appears.
3. Click **Create Object Mapping**. A Create Object Mapping page appears.
4. Enter values in the following fields.


Field	Description
Name	Enter the object record name.
Source Object Name	Enter the source object name.
Target Object Name	Enter the name of the target object that you want to map to the source object.
Sequence	Enter the sequence to indicate how important an object is. When syncing data, the system considers this number to decide which objects should be synced first.
Sync API Path	Enter the relative API path to invoke the Custom API during data sync.
Source Filter Criteria	Enter the source system name for filtering out the records. For example, Salesforce and Postgres.

Field	Description
Category	Enter the name of the application to which the object belongs, such as CLM, CRM, CPQ, etc.
Sync Direction	<p>Select the direction of sync from the dropdown list:</p> <ul style="list-style-type: none"> • Forward: Near Realtime from Salesforce to RLS • Reverse: Near Realtime from RLS to Salesforce • Both: Near Realtime from Salesforce to RLS and vice versa. • ETL: Extract, Transform, and Load through Data Sync.
Custom Query	Enter the query, including fields and criteria-based filters, to retrieve specific records. It is useful for the Postgres system as a source.
Source Type	Enter the type of source system a data sync establishes a connection with. It supports Salesforce and Postgres at the moment.
Is Protected	Enable this toggle to prevent any modifications to the object and mark it as an OOTB schema object mapping.
Is Enabled?	<p>Enable this toggle if you want the system to take the object into consideration when syncing data.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> This applies to manual data sync. In the case of scheduled data sync, it considers the specific objects you have chosen when creating a sync schedule. For more details on scheduling data sync, see Scheduling Data Sync.</p> </div>
Is Document Sync Required?	Enable this toggle to sync the documents. This is only for the CLM application documents.

Field	Description
Is Complex Array Type	<p>Enable this toggle to indicate that an object supports the Complex Array type. Once enabled, you must specify values for the Complex Array Type Field Name and Complex Array Parent ID Field Name from the platform schema.</p> <p>This is useful for the Approvals use cases.</p>



5. Click **Save**. A new object mapping is created. You may want to create a new field mapping for the new object.
6. Adding Field mappings to the new object:
 - a. Click on the required Object Mapping from the list > click **Create Field Mapping**. The Field Mappings page appears.
 - b. Enter values in the following fields.

Field	Description
Name	Enter the field record name.
Source Field Name	Enter the keyword to search and select the source field name.
Source Field Type	Enter the source field type.
Target Field Name	Enter the keyword to search and select the target field name that you want to map to the source field.
Target Field Type	Enter the target field type.
Target Lookup Object Name	Enter the name of the lookup object if the target field is lookup.
Rule Name	Enter the rule name used to execute the specific transformation name that is needed as part of data sync while bringing data from the source to the destination system.
Is Image Field	Enable this toggle to indicate that a field is intended to store the image information in URL format.



Field	Description
Is ID Column	Enable this toggle to mark a field as the Primary ID field for the associated object. This is useful for the Conga Contract use cases.
Is Primary Name Field	Enable this toggle to mark a field as the Primary Name Field for the associated object. This is useful for the Conga Contract use cases.
Is Reverse Sync Enabled	<p>Enable this toggle to indicate that a field is a part of transaction data that needs to be synced from the platform to an external system.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p> Some of the objects and fields have limitations for reverse sync. For more information, see Limitation for Reverse Sync.</p> </div>
Is Enabled?	Enable this toggle if you want the system to take the field into consideration when syncing data.

- c. Click **Save**. A new field mapping is created for the object.

To edit object mapping

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**. The Mapped Objects for Data Sync page appears with a list of objects.
3. Click the More () icon next to the object.
4. Click **Edit**.
5. Edit the fields as required and click **Save**.

To delete object mapping

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**. The Mapped Objects for Data Sync page appears with a list of objects.
3. Click the More () icon next to the object.
4. Click **Delete**.

Limitation for Reverse Sync

Because the fields listed below are not supported by Reverse Sync, do not enable the **Is Reverse Sync Enabled** toggle during field mapping.

⚠ Important

Because Reverse Sync does not support formula fields, they should not be included in mapping. This is by design, as SFDC does not support inserting or updating formula fields.



Object Name: Lineltem	
Field Name	Source Field Name
Asset	Apttus_Config2__AssesId__c
CollaborationParentLineNumber	Apttus_Config2__CollaborationParentLineNumber__c
ConstraintCheckStatus	Apttus_Config2__ConstraintCheckStatus__c
CopySourceLineNumber	Apttus_Config2__CopySourceLineNumber__c
HideCopyAction	Apttus_Config2__HideCopyAction__c
HideInvoiceDisplay	Apttus_Config2__HideInvoiceDisplay__c
AccountLocation	Apttus_Config2__LocationId__c
SyncStatus	Apttus_Config2__SyncStatus__c
Object Name: Proposal Lineltem	
Field Name	Source Field Name
Asset	Apttus_QPConfig__AssesId__c
AutoRenew	Apttus_QPConfig__AutoRenew__c

Object Name: Proposal LineItem	
Field Name	Source Field Name
HideInvoiceDisplay	Apttus_QPConfig__HideInvoiceDisplay__c
AccountLocation	Apttus_QPConfig__LocationId__c
PricingFrequency	Apttus_QPConfig__Frequency__c
PricingTerm	Apttus_QPConfig__Term__c
ProductUom	Apttus_QPConfig__Uom__c



Importing and Exporting Data Object Mappings

The Data Sync UI allows you to import the object mapping which is saved in the form of JSON.

To import object mapping

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**.
The Mapped Objects for Data Sync page appears.
3. Click the More () icon.
4. Click **Import**.
5. Click **Browse Files** > Select the required object mapping file > click **Save**.

To export object mapping


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**.
The Mapped Objects for Data Sync page appears.
3. Click the More () icon.
4. Click **Export** to download an Object Mapping file (JSON).

Running Data Sync on Demand


In cases where you need to initiate data sync manually, you perform an on-demand data sync from the Data Sync UI.

Prerequisites:


- Data sync is enabled for the tenant.
- The tenant includes one or more object mappings.

 You must set up your data synchronization infrastructure before running data sync. For more details on configuring data sync infrastructure, see [Getting Started with Data Sync](#).

To run data sync manually

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**. The Mapped Objects for Data Sync page appears.
3. Click **Sync Now**. The Sync Now window appears.

Field	Description
Sync Type	Select the synchronization method that suits your needs: <ul style="list-style-type: none"> • Full: Resyncs all objects, including previously synced ones. • Incremental: Syncs only new objects or those not on the Conga Platform yet.
Sync Attribute Data	Enable this toggle to sync attribute data (which may include fields, metadata, or additional information) associated with the object.

 The system displays a validation alert if the entered [Salesforce and Platform Settings](#) information is invalid.

4. Click **OK**. The data sync process is begun and you are redirected to the Run History tab.
5. Click [Run History](#) to view sync details and any associated errors.

Working with Data Sync Run History

After a manual or scheduled data sync is run, information about the sync is accessible from the **Run History** button, regardless of whether or not the data sync was successful. You can view and interact with the data sync run history to monitor the progress or status of the sync and any errors generated if the sync was unsuccessful.

Run History							Back
Pipeline Id	StartTime	EndTime	Sync Status	Action	Trigger Type	Run Type	Current Stage
4fa9e6ab-1172-4dd7-b45f-...	2023-05-24T09:25:00.838	2023-05-24T09:26:03.295	● Failure	Retry	Schedule	Incremental	Fetch
3feb55dd-186d-41a6-8d84-...	2023-05-22T13:45:24.917	2023-05-22T13:47:56.813	● Failure	Retry	Ondemand	Full	Fetch
b52a2156-6ef4-4415-8a39-...	2023-05-21T12:29:16.813	2023-05-21T12:31:32.591	● Failure	Retry	Ondemand	Full	None
11d53368-dea5-4803-87cd-...	2023-05-18T07:10:52.093	2023-05-18T07:12:45.374	● Failure	Retry	Ondemand	Full	None
9d8fbf87-af3a-446a-9ac2-4-...	2023-05-17T06:34:56.505	2023-05-17T06:36:54.019	● Failure	Retry	Schedule	Incremental	Fetch
e74c6654-fa9f-479e-98b8-1-...	2023-05-11T10:01:27.603	2023-05-11T10:02:05.493	● Failure	Retry	Ondemand	Retry	None
b81d2563-0471-4ce8-8df6-...	2023-05-05T08:34:52.927	2023-05-05T08:35:14.929	● Retry		Ondemand	Retry	None
4db6a73b-efcb-443d-8679-...	2023-05-03T07:41:00.769	2023-05-03T07:43:49.048	● Retry		Schedule	Incremental	None
7e3ea3cf-6c4a-40fd-be51-c-...	2023-05-03T07:38:00.842	2023-05-03T07:43:55.724	● Failure	Retry	Schedule	Incremental	None
b00b4b61-1cf0-4ff6-b860-8-...	2023-05-03T07:08:00.58	2023-05-03T07:14:25.923	● Failure	Retry	Schedule	Incremental	None
d0439e2e-c930-4f72-b1e0-...	2023-05-03T06:08:00.119	2023-05-03T06:14:52.079	● Failure	Retry	Schedule	Incremental	None
00524f41-9dce-4711-8b45-f-...	2023-05-03T05:08:00.992	2023-05-03T05:15:51.25	● Failure	Retry	Schedule	Incremental	None
4404ac7e-cb12-4441-a81e-...	2023-05-03T04:08:00.413	2023-05-03T04:13:49.96	● Failure	Retry	Schedule	Incremental	Transform
05574e69-65f8-4402-889d-...	2023-05-03T03:08:00.904	2023-05-03T03:13:43.224	● Failure	Retry	Schedule	Incremental	None
a295c4bf-922f-4681-8cf4-a-...	2023-05-03T02:08:01.178	2023-05-03T02:13:43.231	● Failure	Retry	Schedule	Incremental	Transform
08416fd7-1b98-4d73-9ab0-...	2023-05-03T01:08:00.917	2023-05-03T01:13:55.201	● Failure	Retry	Schedule	Incremental	None
7d04e8cb-0906-4f24-864f-e-...	2023-05-03T00:08:00.412	2023-05-03T00:14:17.39	● Failure	Retry	Schedule	Incremental	None
e8f24d42-d363-4592-9e5f-f-...	2023-05-02T23:08:01.143	2023-05-02T23:14:23.058	● Failure	Retry	Schedule	Incremental	None
0c159e39-e8a1-43dd-a770-...	2023-05-02T22:08:00.422	2023-05-02T22:13:59.33	● Failure	Retry	Schedule	Incremental	Transform
a78393b3-62d5-4ecb-b5d3-...	2023-05-02T21:08:01.211	2023-05-02T21:17:45.291	● Failure	Retry	Schedule	Incremental	None

The Run History table displays the following information.


Column	Description
Pipeline ID	The ID of a sync operation. Click the link to view object-level details like its entity name, where it is in the processing stage, its status, how many items are in its batch, how many succeeded, and how many failed. Additionally, you can also download an error report in a JSON file by clicking the Errors button from the Pipeline ID > Run Details screen.
Start Date and Time	The date and time the sync operation was initiated. You can use the start date to get an understanding of how recently data was pulled from Salesforce to the consumer service.
End Date and Time	The date and time the sync operation was completed or failed.

Column	Description
Sync Status	<ul style="list-style-type: none"> • In Progress - The data sync operation is currently in progress. • Success - The data sync operation was successful without any errors. • Failure - The data sync operation failed with one or more errors. • Retry - The data sync operation was interrupted.
Action	If the sync fails for any reason, you can retry the sync after clearing the issues.
Trigger Type	Indicates whether the sync was Scheduled , Manual , or Resync .
Run Type	Indicates in which mode (incremental, full, Incremental, Retry) the Data sync was triggered.
Current Stage	The current status of the Data Sync.



Only the most recent syncs are displayed on the page on your screen. To view older syncs, scroll down and increase the number of Rows per page or click the > icon to move to the next page. You can also use the search function at the top to find a specific sync ID.

Scheduling Data Sync

You can set and schedule master data to be synced at specified intervals. You can manage the frequency of data sync operations and schedule a date and time for the sync to start.

 You must set up your data synchronization infrastructure before scheduling data sync. For more details on configuring data sync infrastructure, see [Getting Started with Data Sync](#).

To schedule the data sync frequency

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Data Sync**.
3. Click the More () icon on the Data Sync UI.
4. Click **Schedule**. The Schedules page appears.

5. Click **Create Schedule**. The Create Schedule page appears.

The screenshot shows the 'Create Schedule' page with the following configuration:

- * Frequency:** Week
- * Interval:** 2
- * Start Time:** 09/22/2023 04:25 PM
- * Trigger Operation:** start
- Sync Attribute Data:**

A table below shows 2 rows selected:

<input type="checkbox"/>	Name	Source Object Name	Target Object Name	Is Enabled?
<input type="checkbox"/>	RecordType	RecordType	RecordType	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Account	Account	Account	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	User	User	User	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AccountContactRole_SF_c	AccountContactRole	AccountContactRole_SF_c	<input checked="" type="checkbox"/>

6. Enter values in the following fields.

Field Name	Description
Frequency	Select the frequency at which you want the schedule to run, like hourly, daily, weekly, or monthly.
Interval	Specify how often you want to conduct the sync process for the selected frequency. For example, to set the schedule to run every two weeks, select Week as the frequency option and input 2 as the interval.
Start Time	Pick a date and time to trigger the sync operation.

Field Name	Description
Trigger Operation	<p>Select an appropriate operation to apply to a data sync schedule.</p> <ul style="list-style-type: none"> • Start - Enables a scheduled data sync. • Stop - Keeps a scheduled data sync disabled. <div style="border: 1px solid green; padding: 5px; margin-top: 10px;"> <p>✔ When you configure schedule sync with a frequency of Weekly, an interval of 2, and a trigger operation set to Start, the sync will occur once every two weeks. However, if you select Stop as the trigger operation, a schedule will be created, but the sync will not take place.</p> </div>
Sync Attribute Data	<p>Enable this toggle to sync attribute data (which may include fields, metadata, or additional information) associated with the object.</p>
Search	<p>Search objects by keyword, or applying one or more advanced filters and filter logic. For more details, see Filtering Records in the Grid View.</p>
Object List	<p>Select the object records for which you want to create a data sync schedule.</p>

7. Click **Save**. The schedule for syncing the data is set. The Schedules page displays the newly configured schedule, any run currently in progress, and also the date and time of the next scheduled sync.

ⓘ All selected objects are synced during scheduled sync even if they are disabled. To prevent syncing disabled objects, update the schedule and deselect them.

To change the data sync schedule

1. Open the Data Sync module.
2. Go to the **Schedules** page.
3. Click the more (⋮) icon on the Data Sync UI.

4. Click **Edit**. The Edit Schedule page appears.

<input type="checkbox"/>	Name	Source Object Name	Target Object Name	Is Enabled?
<input type="checkbox"/>	RecordType	RecordType	RecordType	✔
<input checked="" type="checkbox"/>	Account	Account	Account	✔
<input checked="" type="checkbox"/>	User	User	User	✔
<input type="checkbox"/>	AccountContactRole_SF_c	AccountContactRole	AccountContactRole_SF_c	✔
<input type="checkbox"/>	Contact	Contact	Contact	✔
<input type="checkbox"/>	Product	Product2	Product	✔

5. Edit the fields as required and click **Save**.

Working with All Object Mappings

The All Object Mappings feature simplifies the process of mapping source objects to target objects. It provides a comprehensive view of imported external objects and enables direct source-to-target mapping on a single screen. If a required target object is missing, users can create it seamlessly. It also automatically creates a default set of fields for target objects and facilitates precise source-to-target field mapping.

⚠ You must set up your data synchronization infrastructure before object mapping. For more details on configuring data sync infrastructure, see [Getting Started with Data Sync](#).

Is Schema Synced?	IsProtected	Source Object Name	Target Object Name ↑	Sequence	Category	SyncDirection
☑	🛡️	AcceptedEventRelation	AcceptedEvent_c	100	CLM	ETL
☑	☑	Account	Account	1	CRM	ETL
☑	🛡️	AccountBrand	AccountBrand_c	100	CLM	ETL
☑	☑	Apttus_Config2_AccountLo...	AccountLocation	12	CPQ	ETL
☑	☑	Contract	Agreement	304	CLM	ETL
☑	☑	Apttus_APTS_Agreement_c	Agreement	54	CLM	ETL
☑	☑	Apttus_Agreement_Clause...	AgreementClause	59	CLM	ETL
☑	☑	Apttus_AgreementInsight_c	AgreementInsight	71	CLM	ETL
☑	☑	Apttus_AgreementLineite...	AgreementLineitem	55	CLM	ETL
☑	☑	Apttus_Agreement_Protect...	AgreementProtection	50	CLM	ETL

The All Object Mappings page displays the following information.

Column	Description
Is Schema Synced?	The current status of the schema synchronization.
Is Protected	Represents whether it is an out-of-the-box (OOTB) object or not.
Source Object Name	The source object name.
Target Object Name	The name of the target object that is mapped to the source object. If the source object and the target object are not mapped, it remains blank.
Sequence	When syncing data, this number indicates how important an object is. The system considers this number to decide which objects should be synced first.
Category	Indicates the application the object belongs to, such as CLM, CRM, CPQ, etc.
Sync Direction	Represents direction of sync: <ul style="list-style-type: none"> • Forward: Near real-time from Salesforce to RLS • Reverse: Near real-time from RLS to Salesforce • Both: Near real-time from Salesforce to RLS and vice versa. • ETL: Extract, transform, and load through data sync.

To map source object with target object

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Apps** > **Data Sync**.
3. Click the More (⋮) icon on the Data Sync UI and select **Mappings**.
The list of all mapped objects for data sync appears.
4. Navigate to the source object name that you want to link with a target object. The Pencil icon appears next to each item in the row.

Source Object Name	Target Object Name	Sequence	Category
AccountChangeEvent		100	
AccountContactRole		100	
AccountContactRoleChange...		100	

Source Object Name	Target Object Name	Sequence	Category
AccountChangeEvent		100	
AccountContactRole	<input type="text"/>	100	
AccountContactRoleChange...		100	

5. Click the Pencil icon next to each field and enter the required information.
6. Click **Save**. The application displays an action message if the target object name you entered does not exist in the system.
7. From the action dialog, click **OK**. The All Object Mappings page displays the newly mapped configuration.


To map source field with target field

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Apps** > **Data Sync**.
3. Click the More (⋮) icon on the Data Sync UI and select **Mappings**.
The list of all mapped objects for data sync appears.
4. Click the Source Object Name for which you want to map fields.
The All Field Mappings page appears.
5. Navigate to the source field name that you want to link with a sink field name. The Pencil icon appears next to each item in the row.
6. Click the Pencil icon next to each item and enter the required information.
7. Click **Save**.


Managing Localization

The Conga Platform provides administrators with provisions for configuring locale settings and translating text, strings, and labels to any language suitable for the specific region-wise audience. You can either use the Translation Workbench user interface or [REST APIs](#) as per your business needs.

Every tenant (customer) is associated with a specific default locale, referred to as *organization-wide* or *tenant locale*. When you want to localize your tenant to accommodate one or more locales other than the tenant locale, use the **Translation Workbench** administrator tool.

To open Translation Workbench, navigate to the **App Launcher** () icon from the top left corner and select **Translation Workbench**. By default, a list of modules is displayed.

Using the Translation Workbench, you can export strings that reside in your tenant database to a separate file, provide the exported strings to a translator, and then import the translated strings back to the tenant database. Each translated string is stored in the tenant database as a *key-value pair*, with the key representing the translation, and the value representing the translation of the string for the given locale. In this way, there is a single key that identifies all translations of a specific string. Translation keys are also tied to a **module**, which indicates where the string(s) are used in the application.

 In the absence of user-level locale preference, the system considers organization-level preference and applies translation accordingly. For example, if the organization level locale is 'English' and the logged-in user's locale is 'Chinese', the application will be translated into 'Chinese' for this specific user.

Select one of the following topics for more information on the options and actions available on the user interface:

- [Creating and Managing Modules](#)
- [Creating and Managing Translations](#)
- [Exporting Translations](#)
- [Importing Bulk Translations](#)


Creating and Managing Modules

You can manage modules that you want to translate into a region-specific language from the Modules tab. It allows you to:

- Create new module


- Delete module

To add a new module

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Translation Workbench**.
By default, the Module tab is selected.
3. Click **Add New Module**.
4. Enter a **Name** for the module.
5. Click **Save**.

The next step is to create a Translation and associate it with the module you created. For more information, see [Creating and Managing Translations](#).

To delete a module

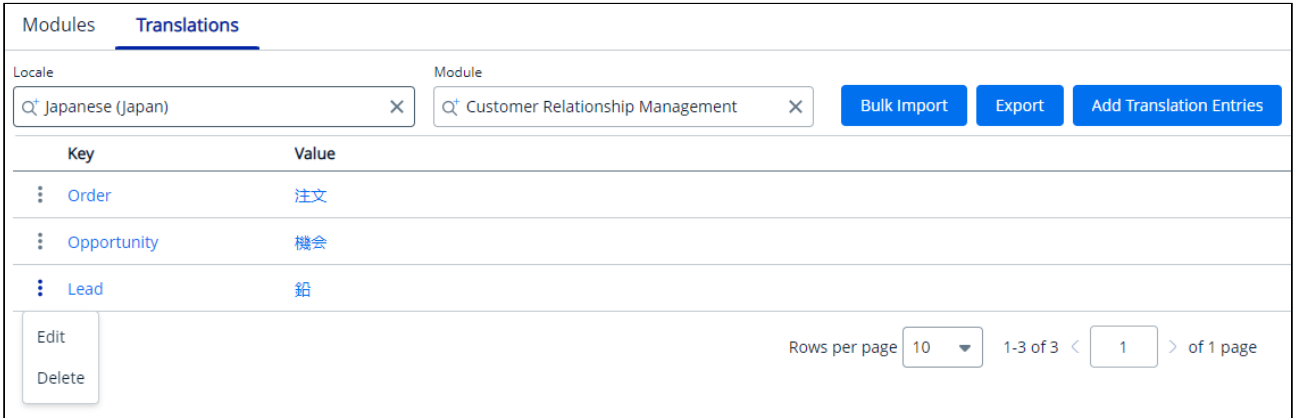
1. Click the More () icon for the respective module from the list and select **Delete**.
2. From the confirmation dialog, click **Submit**.

Creating and Managing Translations


By default, the application does not automatically add strings from certain sources to the tenant database. You must manually add strings using the **Add Translation Entries** or **Bulk Import** features of the Translation Workbench. You can translate a single string or multiple strings for a locale and module as you specify. For more information on Module, see [Creating and Managing Modules](#).




While adding translations, make sure to specify the correct **Key**. The translation keys connect to the layout, application, or system location where the translation will be returned and displayed to the user at runtime.

The following image shows an example of the Translations screen. You must enter Locale and Module to view the list of all available translations. The screen also contains features for creating, modifying, and exporting translations.




To add translation entries

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Translation Workbench**.
3. Go to the Translations tab.
4. Search and select the **Locale** and **Module** for which you want to add a translation.
5. Click **Add Translation Entries**.
The Add Translation Entries popup appears.
6. Enter or select appropriate values for the following:


Field/ Icon	Description
Key	Enter the key name of the location where you want to apply the translation (for example, screen, field, module, layout, application, system, etc.). <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  This is applicable to all metadata. </div>
Value	Enter the translation of the key for the selected locale and module.
Add Translation Entries	Click the Add Translation Entries () icon to add multiple translation entries.
Remove Translation Entry	Click the Remove () icon to remove the translation entry.

7. Click **Save**.


Each translated string is stored in the tenant database as a *key-value pair*, with the key representing the translation, and the value representing the translation of the string for the given locale.

 You can bulk import or export translation entries for the particular locale and module using the available options. For more details, see [Importing Bulk Translations](#) and [Exporting Translations](#).

To edit translation

1. Click the More () icon for the respective translation from the list and select **Edit**.
2. Modify the value.
3. Click **Save**.


To delete translation

1. Click the More () icon for the respective translation from the list and select **Delete**.
2. From the confirmation dialog, click **Submit**.

Exporting Translations

The Export feature allows downloading translation entries for a selected locale and module, which can then be used as a reference when importing bulk translation entries or kept as a backup of the current translation record.

To export translations


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Translation Workbench**.
3. Go to the Translations tab.
4. Select the **Locale** and **Module** to retrieve the list of translation entries.
5. Click **Export**. The exported strings are saved locally as a file. The exported strings populate the data in four columns: *Module*, *Key*, *Default Org Locale*, and *Value*

After the export is complete, the file can be sent to translators to manually add translations to the file. When translation work is complete, [import the modified file](#) as the next step.

Importing Bulk Translations

Use the **Import** action to import translated entries to the tenant database. The structure and formatting of the import file must match the [exported entries](#).

To import multiple translation entries

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Apps** > **Translation Workbench**.
3. Go to the Translations tab.
4. Search and select the **Locale** and **Module** for which you want to import multiple translation entries.
5. Click **Bulk Import**.
The Bulk Import Translations popup appears.
6. Browse the file you want to import. A confirmation message appears.

All translated entries from the selected file are imported for the selected Locale and Module. You can now update the imported entries as required. For more details, see [Creating and Managing Translations](#).

Conga Revenue Lifecycle Platform API Reference

This section explains the REST APIs provided by Conga Revenue Lifecycle Platform.

Topic	Description
What's Covered	This section walks the API developers through the list of REST APIs provided by Conga.
Primary Audience	API developers.
Updates	For a comprehensive list of updates for each release, see the What's New in Conga Revenue Lifecycle Platform topic.
Other Resources	Refer to <i>Conga Revenue Lifecycle Platform Release Notes</i> for information on new features and enhancements, resolved issues, and known issues for a specific release.

Before using Conga Revenue Lifecycle Platform, you must be familiar with the following:

- Basic knowledge of REST APIs
- Conga terms and definitions
- [Revenue Lifecycle Platform APIs](#)
- [Supported Mime Types and File Extensions for Email APIs](#)

Revenue Lifecycle Platform APIs

Navigate to the [Conga Developer Portal](#) to review interactive API documentation for Conga Revenue Lifecycle Platform.

Supported Mime Types and File Extensions for Email APIs

When sending emails, the following **Mime Types** and **File Extensions** are supported for attachments.

```

1  {"aac", new List<string>(){ "audio/aac" } },
2  {"abw", new List<string>(){ "application/x-abiword" }},
3  {"arc", new List<string>(){ "application/x-freearc" }},
4  {"avif", new List<string>(){ "image/avif" }},
5  {"avi", new List<string>(){ "video/x-msvideo" }},
6  {"azw", new List<string>(){ "application/vnd.amazon.ebook" }},
7  {"bin", new List<string>(){ "application/octet-stream" }},
8  {"bmp", new List<string>(){ "image/bmp" }},
9  {"bz", new List<string>(){ "application/x-bzip" }},
10 {"bz2", new List<string>(){ "application/x-bzip2" }},
11 {"cda", new List<string>(){ "application/x-cdf" }},
12 {"csh", new List<string>(){ "application/x-csh" }},
13 {"css", new List<string>(){ "text/css" }},
14 {"csv", new List<string>(){ "text/csv" }},
15 {"doc", new List<string>(){ "application/msword" }},
16 {"docx", new List<string>(){ "application/vnd.openxmlformats-
    officedocument.wordprocessingml.document" }},
17 {"eot", new List<string>(){ "application/vnd.ms-fontobject" }},
18 {"epub", new List<string>(){ "application/epub+zip" }},
19 {"gz", new List<string>(){ "application/gzip" }},
20 {"gif", new List<string>(){ "image/gif" }},
21 {"htm", new List<string>(){ "text/html" }},
22 {"html", new List<string>(){ "text/html" }},
23 {"ico", new List<string>(){ "image/vnd.microsoft.icon" }},
24 {"ics", new List<string>(){ "text/calendar" }},
25 {"jar", new List<string>(){ "application/java-archive" }},
26 {"jpeg", new List<string>(){ "image/jpeg", "application/photoshop" }},
27 {"jpg", new List<string>(){ "image/jpeg", "application/photoshop" }},
28 {"js", new List<string>(){ "text/javascript" }},
29 {"json", new List<string>(){ "application/json" }},
30 {"jsonld", new List<string>(){ "application/ld+json" }},
31 {"midi", new List<string>(){ "audio/midi", "audio/x-midi" }},
32 {"midi", new List<string>(){ "audio/midi", "audio/x-midi" }},
33 {"mjs", new List<string>(){ "text/javascript" }},
34 {"mp3", new List<string>(){ "audio/mpeg" }},
35 {"mp4", new List<string>(){ "video/mp4" }},
36 {"mpeg", new List<string>(){ "video/mpeg" }},
37 {"mpkg", new List<string>(){ "application/vnd.apple.installer+xml" }},
38 {"odp", new List<string>(){ "application/
    vnd.oasis.opendocument.presentation" }},
39 {"ods", new List<string>(){ "application/
    vnd.oasis.opendocument.spreadsheet" }},
40 {"odt", new List<string>(){ "application/vnd.oasis.opendocument.text" }},
41 {"oga", new List<string>(){ "audio/ogg" }},

```

```

42  {"ogv", new List<string>(){ "video/ogg" }},
43  {"ogx", new List<string>(){ "application/ogg" }},
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Conga Revenue Lifecycle Platform

Features by Release

Review the latest Conga Revenue Lifecycle Platform Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of Conga Revenue Lifecycle Platform. For more information, see [Conga Revenue Lifecycle Platform Features by Release](#).

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