



Conga Revenue Lifecycle Platform

202411.1.0 Preview Release

Get early access to the latest features and improvements.



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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 the Conga Revenue Lifecycle Platform.

- [202411.1.0 Release Notes](#)
- [Preview Documentation for Next Release](#)

202411.1.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the Conga Revenue Lifecycle Platform 202411.1.0 release. For documentation updates, see [What's New in Conga Revenue Lifecycle Platform Documentation](#).

 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

New Features and Enhancements

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

New Search Runtime API

Non-administrator users can now use the `GET api/search/v1/setting/list` endpoint to get a list of objects that have search settings enabled. For more information, see the [Developer Hub](#).

UI Enhancements for Consistent User Experience

UI elements in the Service Hooks module are now updated, including button labels and validation messages, to ensure a consistent user experience across Conga RLM.

Bulk Edit Records in Grid View

You can now select multiple records or rows in Grid View to perform bulk edits on editable fields. For example, selecting 20 records allows you to update the "modified" value for the action field across all selected records with a single action. The selected value will be applied to all chosen records. Non-editable records cannot be selected for bulk editing, and non-editable fields will not be visible.

This feature is configurable through CX Studio and is currently available for the Contracts app only. To learn more about configuring bulk actions, see [Managing Data Grid View](#).

Improved Dependent Picklist Behavior

The dependent picklist field is disabled until a value is selected in their controlling field. This prevents users from selecting values that are not contextually valid, enhancing data accuracy and user experience.

Fixed Issues

There are no fixed issues in this release.

Known Issues

The following unresolved issues are known to Conga at the time of this release.

| Conga Internal ID | Description |
|-------------------|--|
| PLATFORM-16908 | A Federation ID is required when adding a new user with the Conga IDP. |

DOC ID: RLP202411.1.0RN20241118

Preview Documentation for Next Release

We provide a preview code drop two weeks before the production deployment, giving you early access to the latest features and improvements. You can view the [Preview Release Documentation](#) in PDF.

About Conga Revenue Lifecycle Platform

Revenue Lifecycle Platform (RLP) 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 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 Lifecycle 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 Revenue Lifecycle 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.

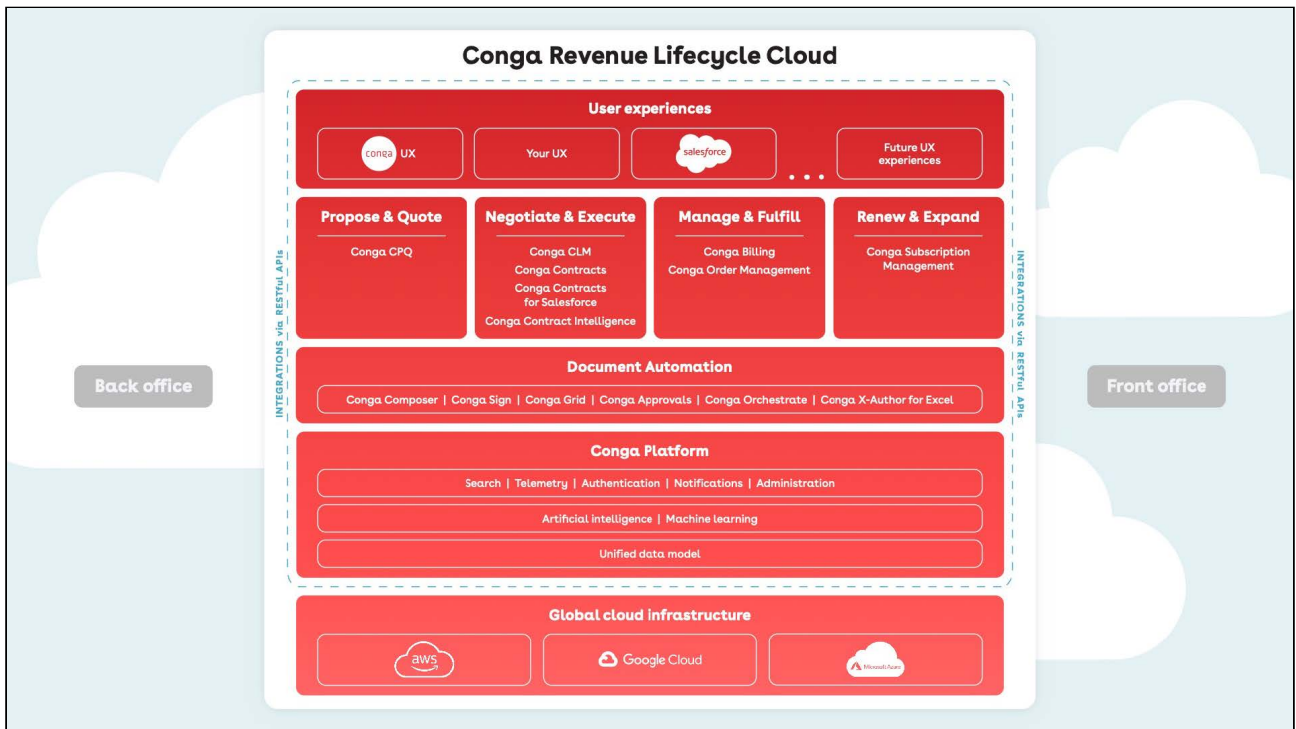
Features

- **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.

202411.1.0

| Doc ument | Publicat ion Date | Topic | Description |
|-------------|-------------------|--|---|
| 2024 11.1.0 | 📅 25 Nov 2024 | Managing Service Hooks | Updated the topic with information about graphical user interface enhancements. |
| | | Managing Data Grid View | Updated the topic with information about configuring bulk record edits in the grid view layout using CX Studio. |
| | | Okta as a SAML Identity Provider | Updated the topic with information about IdP-initiated flow details. |

202410.2.0


| Document | Publication Date | Topic | Description |
|------------|------------------|--|--|
| 202410.2.0 | 📅 11 Nov 2024 | Start Workflow | Updated topic with information about trigger condition for the Update action type and for the Create and/or Delete action types. |
| | | Create Records | Updated the topic with information about supporting dynamic configuration for the Owner field and the lookup field. |
| | | Update Records | |
| | | Managing Branding and White Labeling | New topic |

202410.1.0


| Document | Publication Date | Topic | Description |
|------------|------------------|---|--|
| 202410.1.0 | 📅 11 Nov 2024 | Adding and Activating User | Updated topic with information about different user types. |
| | | Extensibility API | <p>Introduced new API endpoints that allow executing custom code based on data change events or scheduled triggers:</p> <ul style="list-style-type: none"> • GET <code>/api/extensibility/v1/servicehooks/rules/{name}</code> • ATCH <code>/api/extensibility/v1/servicehooks/rules/{name}</code> • DELETE <code>/api/extensibility/v1/servicehooks/rules/{name}</code> • POST <code>/api/extensibility/v1/servicehooks/rules</code> • GET <code>/api/extensibility/v1/servicehooks/rules</code> • GET <code>/api/extensibility/v1/servicehooks/rules/supported-event-types</code> |
| | | Creating User Groups Creating Email Notifications Creating In-App Notificaitons | Updated topics with information about sending notifications (email and in-app) to all members of the group. |
| | | Send Email Send Email by Template | Updated topics with information about supporting dynamic recipient email addresses. |

| Document | Publication Date | Topic | Description |
|----------|------------------|--|---|
| | | Creating Permission Groups | Updated topics with information about the Read Criteria for all object permissions. |

202409.2.0

| Document | Publication Date | Topic | Description |
|------------|---|---|--|
| 202409.2.0 |  28 Oct 2024 | Understanding Role-Based Access Control | Updated topic with information about information about object and action permissions behavior. |
| | | Creating Permission Groups | |
| | | Creating Workflow | Updated topic with information about Schedule Workflow activity. |

202409.1.0

| Document | Publication Date | Topic | Description |
|------------|---|---|--|
| 202409.1.0 |  30 Sep 2024 | Understanding Role-Based Access Control | Updated topic with information about record type level permission control and field level permission behavior. |
| | | Creating Permission Groups | |
| | | Record Type Permission APIs | Introduced new API endpoints under the User Management APIs. |
| | | Managing Data Grid View | Updated topic with information about field level permission behavior. |
| | | Managing Content Details View | |


| Document | Publication Date | Topic | Description |
|----------|------------------|------------------------------------|---|
| | | Creating Workflow | Updated topic with information about activity listing by workflow type. |
| | | Defining Variables | New topic |

202408.3.0

| Document | Publication Date | Topic | Description |
|------------|---|---|--|
| 202408.3.0 |  16 Sep 2024 | Understanding Role-Based Access Control | Updated topic with information about field-level permission control. |
| | | Creating Permission Groups | |
| | | Field Permission APIs | Introduced new API endpoints under the User Management APIs. |
| | | Creating In-App Notifications | New topic |
| | | Search APIs | Updated the following APIs with information about Group by support in multiple objects search query: <ul style="list-style-type: none"> • <code>POST api/search/v1/objects/{objectName}/query</code> • <code>POST /api/search/v1/objects/multiple/query</code> |
| | | Creating Workflow | Updated topic with information about: <ul style="list-style-type: none"> • Schedule workflow activity • Document generation workflow activity • Formula builder |

| Document | Publication Date | Topic | Description |
|----------|------------------|--|--|
| | | Defining formulas withing a workflow | New topic |
| | | Application Manager | Added a new sub topic about child page creation |
| | | Filtering Records in the Grid View | Updated topic with information about the advanced filter |
| | | Applying Rule | Updated topic with information about applying rules to action using Advanced Rule Edit |
| | | Cloning Standard Actions | New topic |

202408.2.0

| Document | Publication Date | Topic | Description |
|------------|---|---|--|
| 202408.2.0 |  02 Sep 2024 | Creating Workflows | Updated the topics with information about the ESignature activity that helps to perform electronic signatures (eSign). |
| | | Controlling Tab Visibility using Rule Editor UI | New topic |
| | | Application Manager | New topic |


| Document | Publication Date | Topic | Description |
|----------|------------------|-----------|---|
| | | Data APIs | <p>Introduced new API endpoints:</p> <ul style="list-style-type: none"> • <code>POST /api/data/v1/objects/{objectName}/{recordId}/share</code> • <code>PUT /api/data/v1/objects/{objectName}/{recordId}/access-level</code> • <code>DELETE /api/data/v1/objects/{objectName}/{recordId}/un-share</code> • <code>GET /api/data/v1/objects/{objectName}/{recordId}/sharing-info</code> • <code>GET /api/data/v1/objects/{objectName}/{recordId}/{trackingId}/sharing-status</code> |

202408.1.0

| Document | Publication Date | Topic | Description |
|------------|---|--|--|
| 202408.1.0 |  20 Aug 2024 | Creating Workflows | Updated the topics with information about the Create Record activity that helps to create a record for an object at runtime. |
| | | Filtering Records in the Grid View | Updated the topics with information about the support of the Contains operator for the Picklist and Lookup fields. |
| | | Managing Data Grid View | Updated the topics with information about the use of JavaScript to manage actions on the Grid List view page layout. |


| Document | Publication Date | Topic | Description |
|----------|------------------|----------------------|---|
| | | User Management APIs | Updated the <code>POST /api/user-management/v1/users</code> API endpoint and introduced <code>PATCH /api/user-management/v1/users/{integrationUserId}/secret</code> and <code>GET /api/user-management/v1/users/{integrationUserId}/secret</code> API endpoints to support the integration user type. |

202407.2.0

| Document | Publication Date | Topic | Description |
|------------|---|---|---|
| 202407.2.0 |  05 Aug 2024 | Creating Workflows | Updated the topics with information about layout enhancements of the activity listing window. |
| | | Working with Data Sync Run History | Updated the topics with information about reverse data sync status. |
| | | CX Studio | New topic |
| | | Filtering Records in the Grid View | Updated the topics with information about filtering the grid view of records assigned to the owner with a User Group. |
| | | Supported Mime Types and File Extensions for Email APIs | Updated the topics with information about <code>.msg</code> file extension support. |


| Document | Publication Date | Topic | Description |
|----------|------------------|------------|--|
| | | Email APIs | <p>Updated the following API endpoints to support .msg file extension:</p> <pre>POST /api/email/v1/emails</pre> <pre>POST /api/email/v1/emails/bulk</pre> <pre>POST /api/email/v1/email-templates/{id}</pre> |

202407.1.1


| Document | Publication Date | Topic | Description |
|------------|--|---|---|
| 202407.1.1 |  22 Jul 2024 | Creating and Managing Object Mappings | Updated the topics with information about the auto-population of Source Field Type and Target Field Type based on the selected Source and Target Field names. |
| | | Creating Email Templates | Updated the topics with information about custom code support in the email template. |
| | | Creating Workflows | Updated the topics with information about workflow variable data type selection. |

| Document | Publication Date | Topic | Description |
|----------|------------------|--------------------------|--|
| | | Document Management APIs | Updated the following API endpoints to support .msg, .xls, and .xlsx file extensions: POST/api/document-management/v1/documents POST/api/document-management/v1/documents/upload |


202406.2.0

| Document | Publication Date | Topic | Description |
|------------|--|---|---|
| 202406.2.0 |  08 Jul 2024 | Schema Manager APIs | Introduced new API endpoints: Object Metadata GET /api/metadata/v1/objects/{objectName}/fields/{fieldName} GET /api/metadata/v1/objects/{objectName}/fields/{fieldName}/dependency-fields |
| | | Creating Workflows | Updated the topics to reflect the enhanced user interface. |
| | | Working with Workflow Instances | |
| | | Managing Data Sync | Updated the topic with information about including audit fields in reverse data sync. |
| | | Creating and Managing Object Mappings | |

202406.1.0

| Document | Publication Date | Topic | Description |
|------------|---|--|--|
| 202406.1.0 |  25 Jun 2024 | Working with Stages | New topic |
| | | Creating Workflows | Updated topic with information about Fault and Done outcomes for the update activity |
| | | Creating Roles | Updated topic with information about application access for non-admin users. |
| | | Creating Permission Groups | |
| | | Creating Notifications | Updated topic with information about checking criteria when the notification is triggered. |
| | | Logging in to Conga Revenue Lifecycle Platform | Updated topic with information about multi-factor authentication (MFA) with the Conga IDP. |

202405.2.0

| Document | Publication Date | Topic | Description |
|------------|---|------------------------------|--|
| 202405.2.0 |  22 Jun 2024 | Viewing Conga Org Details | Updated topic with information about disablement of a welcome email upon a new user creation. |
| | | Creating and Managing Fields | Updated topic with information about automatic field value calculation using Rollup data type. |
| | | Reporting and Dashboards | Updated topic with information about the tenant-specific record display for logged-in users. |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|--|
| | | Creating and Managing Fields | Updated topic with Is Queryable label wherever there was Is Indexed. |
| | | Creating Notifications | Updated topic with information about recipient type as Field. |
| | | Running Data Sync on Demand | Updated topic with information about turning off a welcome email upon data sync completion. |
| | | Filtering Records in the Grid View | Updated topic with information about improved filtering experience. |
| | | Scheduler API | Updated the delete API method to delete the scheduled job's execution history: <pre>DELETE https:// r1s.congacloud.com/api/ scheduler/v1/jobs/{jobName}</pre> |

202405.1.0

| Document | Publication Date | Topic | Description |
|------------|------------------|--|---|
| 202405.1.0 | 📅 07 Jun 2024 | Reporting & Dashboards | New topic |
| | | Creating Workflows | Updated topic with information about new workflow activities. |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|--|
| | | Working with Workflow Definitions | Updated topic with information about the out-of-the-box (OOTB) workflow definitions. |
| | | Creating and Managing Fields | Updated topic with information about custom field deletion. |
| | | Alert Management APIs | <ul style="list-style-type: none"> Introduced a new API endpoint to get the notification audit logs. <pre>GET /api/alert-management/v1/notifications/{notificationId}/execution-logs</pre> Enhanced the create notification API to check criteria when the notification is triggered. <pre>POST /api/alert-management/v1/notifications</pre> |

| Document | Publication Date | Topic | Description |
|----------|------------------|-----------------|---|
| | | Translation API | Enhanced the bulk update localization API to update multiple translations for a specific locale and module. <pre>POST /api/localization/v1/translations/bulk</pre> |

202404.2.0

| Document | Publication Date | Topic | Description |
|------------|------------------|------------------------|---|
| 202404.2.0 | 📅 23 May 2024 | Creating Notifications | Updated topic with information about multiple recipient support for a notification. |
| | | Managing Custom Code | New topic |
| | | Managing Service Hooks | New topic |

202404.1.0

| Document | Publication Date | Topic | Description |
|------------|------------------|----------------------|---|
| 202404.1.0 | 📅 10 May 2024 | User Management APIs | Introduced a new API endpoint to clone permission group name: <pre>POST /api/user-management/v1/permissiongroups/{permissionGroupName}/clone</pre> |

| Document | Publication Date | Topic | Description |
|----------|------------------|-----------------------|--|
| | | Alert Management APIs | Enhanced the bulk notification API endpoint to for sorting the results. <code>POST /api/alert-management/v1/notifications/bulk</code> |

202403.3.0

| Document | Publication Date | Topic | Description |
|------------|------------------|--|--|
| 202403.3.0 | 📅 18 Apr 2024 | Working with User | Updated topic with information about resending welcome email. |
| | | Scheduling Data Sync | Updated topic with information about asset based sync option. |
| | | Filtering Records in the Grid View | Updated topic with information about clear icon for basic search. |
| | | Search APIs | Enhanced the following API endpoint to search through several connected objects. <code>POST /api/search/v1/objects/multiple/query</code> |
| | | Localization APIs | Introduced new API endpoints: <ul style="list-style-type: none"> • Translation Admin <pre>GET api/localization/v1/translations/{locale}/{module}/bulk</pre> <pre>GET api/localization/v1/translations/{module}/locales</pre> |

202403.2.0


| Document | Publication Date | Topic | Description |
|-------------------|--|--|---|
| 202403.2.0 | 📅 03 Apr 2024 | Creating Workflows | Updated topic with information about new supported activities. |
| | | Creating Notifications | Updated topic with information about sending notifications to all existing records. |
| | | Accessing Scheduled Jobs | Updated topic with information about the job deletion. |
| | | User Management APIs | Introduced a new API endpoint: <ul style="list-style-type: none"> User Admin <pre>POST api/user-management/v1/users/{userId}/send-welcome-email</pre> |
| Localization APIs | Introduced a new API endpoint: <ul style="list-style-type: none"> Translation Admin <pre>GET api/localization/v1/translations/{locale}/{module}/bulk</pre> | | |

202403.1.0

| Document | Publication Date | Topic | Description |
|------------|------------------|--|---|
| 202403.1.0 | 📅 20 Mar 2024 | Importing and Exporting Data Object Mappings | Updated topic with information about importing data object mappings. |
| | | Managing Views | Updated topic with information about the personalized grid search view. |


| Document | Publication Date | Topic | Description |
|----------|------------------|--|--|
| | | Formula Builder | Updated topic with information about the formula builder behavior. |
| | | Creating Notifications | Updated topic with information about email templates. |
| | | Okta as a SAML Identity Provider | Updated topic with information about app creation. |
| | | Microsoft Entra (Azure AD) as a SAML Identity Provider | |
| | | Salesforce as a SAML Identity Provider | |

202402.2.0

| Document | Publication Date | Topic | Description |
|------------|---|--|---|
| 202402.2.0 |  07 Mar 2024 | Managing Notifications | New topic |
| | | Search APIs | <p>The following endpoint is updated to include the total document count and the number of occurrences count in the response.</p> <ul style="list-style-type: none"> • <code>POST /api/search/v1/objects/multiple/query</code> |

| Document | Publication Date | Topic | Description |
|----------|------------------|--|--|
| | | Managing External Integration | Updated topic with information about Microsoft Entra and Salesforce as SAML Identity Provider support. |
| | | Adding SAML 2.0 Identity Provider | |
| | | Getting Salesforce Organization ID | |

February '24

| Docu ment | Publicat ion Date | Topic | Description |
|---------------|---|--|---|
| Febru ary '24 |  07 Feb 2024 | Managing Complex Metadata | New topic |
| | | User Groups | New Topic |
| | | Managing Telemetry Logs | New topic |
| | | Creating and Updating Objects | Updated topic with information about record owner information. |
| | | Accessing Scheduled Jobs | New topic |
| | | Logging in to Conga Revenue Lifecycle Platform | Updated topic with information about the quick start guide. |
| | | Creating and Managing Object Mappings | Updated topic with information about skip delete sync and translation sync. |
| | | Translation Sync | New topic |


| Document | Publication Date | Topic | Description |
|----------|------------------|---|---|
| | | Email Notification Settings | New topic |
| | | Transforming Field Values | New topic |
| | | Formula Builder | Updated topic with information about calculating cross-object formula expression. |
| | | Managing Conversions Rate | New topic |
| | | Viewing Conga Org Details | Updated topics with information about guests and community users. |
| | | Adding and Activating Users | |
| | | Working with Users | |
| | | Creating Email Templates | Updated topic with information about email template category. |
| | | Creating and Managing Fields | Updated topic with information about date data type support. |
| | | Managing External Orgs Integration | Updated topic with information about adding one or more external integrations. |
| | | Working with Permission Groups | Updated topic with information about updating guest and community user permission groups. |
| | | Working with Users | Updated topic with information about updating custom fields and external ID for the user. |
| | | Understanding Role-Based Access Control | Updated topic with information about account scope for permission group. |

| Docu ment | Publicat ion Date | Topic | Description |
|-----------|-------------------|------------------------------|---|
| | | Creating and Managing Fields | Updated topic with information about deleting custom fields. |
| | | Creating Permission Groups | Updated topic with information about admin apps view permission. |
| | | Importing Users | Updated topic with information about validation message for bulk user upload. |
| | | User Management APIs | <p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • User Group <ul style="list-style-type: none"> • <code>POST /api/user-management/v1/user-groups</code> • <code>GET /api/user-management/v1/user-groups</code> • <code>PUT /api/user-management/v1/user-groups/{userGroupId}</code> • <code>DELETE /api/user-management/v1/user-groups/{userGroupId}</code> • <code>GET /api/user-management/v1/user-groups/{userGroupId}</code> • User Group Member <ul style="list-style-type: none"> • <code>POST /api/user-management/v1/user-groups/{userGroupId}/members/{memberId}</code> • <code>DELETE /api/user-management/v1/user-groups/{userGroupId}/members/{memberId}</code> • <code>GET /api/user-management/v1/user-groups/{userGroupId}/members</code> • <code>GET /api/user-management/v1/user-groups/{userGroupId}/members/{userGroupMemberId}</code> |
| | | Schema Manager APIs | <p>The following API endpoint is added:</p> <ul style="list-style-type: none"> • Field Definition <ul style="list-style-type: none"> • <code>DELETE /api/schema/v1/objects/{objectName}/fields/{fieldName}</code> |

| Document | Publication Date | Topic | Description |
|----------|------------------|----------------------------|---|
| | | Conversion Management APIs | <p>The following API endpoints are added:</p> <ul style="list-style-type: none"> • Currency Admin <ul style="list-style-type: none"> • GET /api/currency-management/v1/currency-rates • Frequency Conversion Admin <ul style="list-style-type: none"> • GET /api/conversion-management/v1/frequency-conversion-rates/{id} • PUT /api/conversion-management/v1/frequency-conversion-rates/{id} • DELETE /api/conversion-management/v1/frequency-conversion-rates/{id} • GET /api/conversion-management/v1/frequency-conversion-rates • POST /api/conversion-management/v1/frequency-conversion-rates • POST /api/conversion-management/v1/frequency-conversion-rates/bulk • PUT /api/conversion-management/v1/frequency-conversion-rates/bulk • Frequency Conversion Runtime <ul style="list-style-type: none"> • POST /api/conversion-management/v1/query/frequency-conversion-rates • UOM Conversion Admin <ul style="list-style-type: none"> • GET /api/conversion-management/v1/uom-conversion-rates/{id} • PUT /api/conversion-management/v1/uom-conversion-rates/{id} • DELETE /api/conversion-management/v1/uom-conversion-rates/{id} • GET /api/conversion-management/v1/uom-conversion-rates • POST /api/conversion-management/v1/uom-conversion-rates • POST /api/conversion-management/v1/uom-conversion-rates/bulk • PUT /api/conversion-management/v1/uom-conversion-rates/bulk |

| Docu ment | Publicat ion Date | Topic | Description |
|-----------|-------------------|-------------|--|
| | | | <ul style="list-style-type: none"> UOM Conversion Runtime <ul style="list-style-type: none"> POST /api/conversion-management/v1/query/uom-conversion-rates |
| | | Search APIs | <p>The following API endpoints are added:</p> <ul style="list-style-type: none"> Search Admin <ul style="list-style-type: none"> GET /api/search/v1/datasyncstatus GET /api/search/v1/{objectName}/datasyncstatus Search Runtime <ul style="list-style-type: none"> POST /api/search/v1/objects/multiple/query GET /api/search/v1/objects/{objectName}/indexedfields |

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 Updating 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. |

| Document | Publication Date | Topic | Description |
|----------|------------------|---------------------------------------|--|
| | | 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. |
| | | 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"> • PATCH /api/data/v1/custom-objects/{objectName}/bulk • Record Type <ul style="list-style-type: none"> • GET /api/data/v1/custom-objects/{objectName}/recordtypes |
| | | 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"> • POST /api/schema/v1/objects/{objectName}/fields/{fieldName}/expression/validate • GET /api/schema/v1/objects/formula-functions • Record Type Definition <ul style="list-style-type: none"> • POST /api/schema/v1/objects/{objectName}/recordtype-entries • PUT /api/schema/v1/objects/{objectName}/recordtype-entries/bulk |

| Document | Publication Date | Topic | Description |
|----------|------------------|-------------------------------|--|
| | | 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> |
| | | 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-management/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 | 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 |
|----------|------------------|----------------------|---|
| | | User Management APIs | <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](#)
- [Accessing Apps](#)
- [Managing Branding and White Labeling](#)
- [Managing Organization](#)
- [Managing Application Schemas](#)
- [Managing Views](#)
- [Filtering Records in the Grid View](#)
- [Managing Roles and Permission Groups](#)
- [Managing Users](#)
- [Managing Email Templates](#)
- [Managing Data Sync](#)
- [Managing Localization](#)
- [Managing Telemetry Logs](#)

- [Accessing Scheduled Jobs](#)
- [Managing Workflows](#)
- [Managing Notifications](#)
- [Conversion Management](#)
- [Managing Custom Code](#)
- [Managing Service Hooks](#)
- [Reporting and Dashboards](#)
- [CX Studio](#)
- [Application Manager](#)

Logging in to Conga Revenue Lifecycle Platform

The Conga Revenue Lifecycle Platform (RLP) 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 RLP application. Instead, you can utilize your existing credentials from trusted third-party identity providers or your SAML username to Sign in.

- ✔ You can log in to the same organization with different user credentials using two separate tabs in a single browser window.

Prerequisites

- You must be onboarded on the Conga Revenue Lifecycle Platform. Contact your Conga Representative for onboarding.
- The administrator whose email address is provided during onboarding will receive a welcome email containing the Conga RLP URL, user name, and system-generated password. Conga IDP is automatically activated for you. The administrator can then log in to the Conga RLP and configure another external integration (e.g., Salesforce, Salesforce Sandbox, SAML, etc.) to onboard other users with the configured external integration.

The newly onboarded user will receive a welcome email with login details, a Conga RLP URL, and organization information that is used to sign in to the Conga RLP.

To sign in to the Conga RLP using the Conga IDP

1. Open the Conga Revenue Lifecycle Platform URL in the web browser.
It will redirect you to the Conga Platform login screen.
2. Select Conga as the identity provider from the list.
3. Enter your username and password and click **Sign In**.
4. If your email address is not associated with your user record, enter your business email address.
5. Click **Send verification code**.
6. Enter the one-time password (OTP) received on the given email address and click **Verify code**.
Use the **Send new code** button if you don't receive the OTP.
7. Click **Continue**.

This application links your business email address to your username. You won't need to enter your email address for future logins, as it will be automatically filled in when you click **Sign In**.


If you forgot your password or want to reset it, see [Resetting Password for Conga IDP](#).

The Conga Revenue Lifecycle Cloud welcome window appears after successful authentication. It provides quick steps to help onboard customers, set up your organization's credentials, and create roles, permission groups, and users. Click the **Start onboarding** button to view step-by-step instructions to manage customer onboarding activities. Each activity is linked to detailed documentation, facilitating a more efficient and user-friendly onboarding process. If you skip these activities, you can reopen them by clicking the bulb icon at the top right corner of the home page.

 The bulb icon will disappear once you finish all customer onboarding activities.

To sign in to the Conga RLP using another IDP

1. Open the Conga Revenue Lifecycle Platform URL in the web browser.
It will redirect you to the Conga Platform login screen.
2. Select the Identity Provider option from the list to sign in using IDP credentials or enter your username to use SAML to log in.

 Conga Platform supports the following identity providers:

- Microsoft
- Salesforce
- Salesforce Sandbox
- Conga IDP (Refer to the **To sign in to the Conga RLP using the Conga IDP** section)
- SAML


3. You are redirected to the respective Identity Provider or Single Sign-On login screen. If you receive an access prompt while signing in, please grant all access.
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.

Resetting Password for Conga IDP

The reset password flow is designed to provide users with a secure, simple process for recovering access to their account if they forget or want to reset their password. This section covers the steps for Conga IDP users to reset their password.

To reset password


1. Open the Conga Revenue Lifecycle Platform URL in the web browser.
2. Select Conga as the identity provider from the list.
3. Click the **Forgot your password?** link.
4. Enter your **Username** and registered **Email Address** associated with your account.
5. Click **Send verification code**. The verification code has been sent to your email.
6. Check your email inbox, copy the code, and paste it into the Verification Code box.
7. Click **Verify code**.
8. Click **Continue** to reset your password.
9. Enter the new password and confirm it.

-  The password must be between 8 and 64 characters and must have at least 3 of the following:
- a lowercase letter
 - an uppercase letter
 - a digit
 - a symbol

10. Click **Continue**.


The password is reset and you are redirected to your organization's homepage.

Accessing Apps

The App Launcher offers a centralized interface for searching for apps, switching between apps, and personalizing favorites for quick access. To access *App Launcher*, go to the Conga Platform Administration dashboard and click the **App Launcher** () icon.

The App Launcher user interface has four main sections: Apps, Shared Apps, All Apps, and Versions Info.

- **Apps:** Revenue Lifecycle apps (for example, Contracts, Revenue, Document Management, etc.) and Administration apps.
- **Shared Apps:** Common applications used across the Conga Platform.
- **Explore All (All Apps):** A list of all the available groups and apps within the platform application. Additionally, you can use the search bar to search for specific apps based on keywords.
- **Versions Info:** Information about all the current versions of applications available within the platform application.

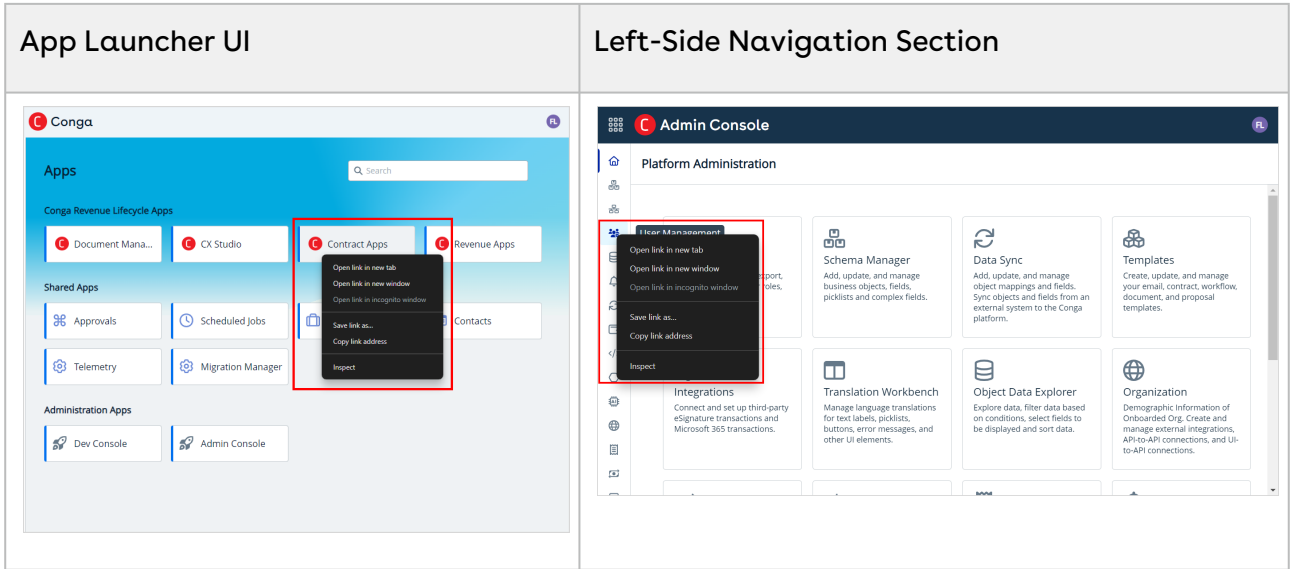
 You can use the Role, Permission Groups, and Admin Permissions features to control which applications non-admin users can see on the Conga Revenue Lifecycle Platform. For more information, see [Creating Roles](#) and [Creating Permission Groups](#).

To open Apps in a New Tab or a New Window

You can open the app in a new tab or a new window within a web browser without navigating away from the current page. To open the app in a new tab or window without navigating away from the current page, follow these steps:

1. Navigate to the app using the App Launcher UI or the left-side section within the app.
2. Right-click the mouse on the app icon.
3. From the context menu that appears, select either "Open link in new tab" or "Open link in new window."

This allows you to access the app while keeping your current page intact, providing a seamless browsing experience.



Managing Branding and White Labeling

White labeling and branding capabilities are essential for companies looking to create a seamless and customized user experience that reflects their identity. With **branding and white labeling**, you can tailor an application’s appearance to align with your organization's brand, making it a natural extension of your business.

You can customize several aspects of the application’s appearance, including:

- Logo and Favicon
- Company Name
- Header Background Color
- App Launcher Icon Color

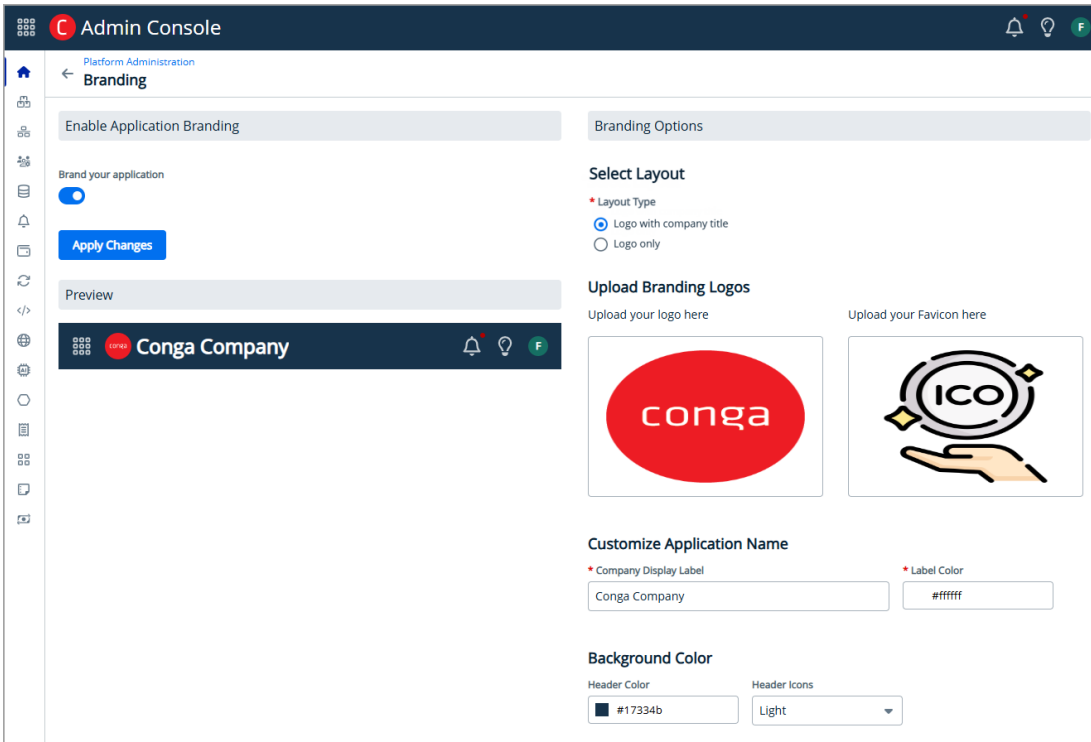
To apply branding and white labeling

1. Click the App Launcher (□) icon in the top-left corner, then go to **Admin Console > Branding**.
2. Enable the **Brand your application** toggle.
3. **Select Layout:** Choose a layout to display the logo only or the logo with the company title.
4. **Upload Branding Logos:** Upload your logo (jpg, jpeg, png) and favicon (ico).

i If no logo is uploaded, the application defaults to the CONGA logo.

5. **Customize Application Name:** This step is only required if you choose the **Logo with company title** option.

- a. Add a company display label to display with the logo.
 - b. Change the label color by selecting or entering a new color.
6. **Background Color:**
- a. Select or enter a color for the header background.
 - b. Choose a dark or light theme for the App Launcher icon.
7. Review the branding and white labeling changes under the Preview section.
8. Click **Apply Changes**.



The changes will apply to the application. To remove them, disable the **Brand your application** toggle.

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

The **Conga Org** tab displays an organization's information. By clicking the **Edit** button, you can modify any available information except the Organization ID, Is Active, and Identity Provider.

Click the App Launcher () icon from the top-left corner > **Admin Console** > **Organization** to access this tab.

 You can also use the Organization APIs to update the organization-level information.

←
Platform Administration

Organization

Conga Org
External Integrations
Conga API Connections

Conga Org Details


Edit

| | |
|--|--|
| Organization Display Name [REDACTED] | Organization ID [REDACTED] |
| Address India | Phone Number [REDACTED] |
| Timezone (GMT-07:00) Mountain Standard Time (America/... | Locale English (United States) |
| Currency USD | Positive Currency Format |
| Negative Currency Format | Short Date Format - |
| Long Date Format dddd, MMMM d, yyyy | Time Format - |
| Decimal Symbol . | Digit Group 123,456,789.00 |
| Digit Grouping Symbol , | Negative Number Format - n |
| Is Active Yes | Auto Provision User Enabled Yes |
| Identity Provider Others | Enable Guest & Customer Community user Yes |
| Disable New User Email Notification No | Enable One Time Migration for Reporting Yes |

The Conga Org page displays the following information.

| Field | Description |
|---------------------------|--|
| Organization Display Name | Name of the organization |
| Organization ID | Code that uniquely identifies your organization to the Conga Platform. |


| Field | Description |
|--------------------------|---|
| Address | Address of the organization. |
| Phone Number | Phone number of the organization. |
| Timezone | Primary time zone in which the organization is located. |
| Locale | The default country or geographic region that is selected for new users in the organization. This setting determines the format of numbers (decimal symbol, digit group, digit grouping symbol, and negative number), dates (long date, short date), and times in the Conga Platform. |
| Currency | Currency that your organization uses for its business. |
| Positive Currency Format | Positive Currency Format of the organization. |
| Negative Currency Format | Negative Currency Format of the organization. |
| Short Date Format | Short Date Format of the organization. |
| Long Date Format | Long Date Format of the organization. |
| Time Format | Time Format of the organization. |
| Decimal Symbol | Decimal Symbol of the organization. |
| Digit Group | Digit Group of the organization. |
| Digit Grouping Symbol | Digit Grouping Symbol of the organization. |
| Negative Number Format | Negative Number Format of the organization. |
| Is Active | Indicates whether the organization is active or not. |

| Field | Description |
|---|---|
| Auto Provision User Enabled | <p>Allows users to auto-provision to the Conga Platform. If this toggle is enabled and the admin user has added and authorized the external integration, other users from that external integration can log in to the Conga Platform with their credentials, and the user is automatically created on the Conga Platform.</p> <p>For example, the admin user has integrated Salesforce as an external service and authorized it. In the Salesforce organization, there are 10 users. Now, if the toggle is enabled, any of these users can log in to the Conga Platform using their Salesforce credentials. Once they log in, their account is automatically created on the Conga Platform.</p> |
| Identity Provider | Identity Provider of the organization. |
| Enable Guest & Customer Community User | <p>Guest and community user functionality for the organization. You can enable and disable the feature by enabling and disabling the Enable Guest & Customer Community User toggle option.</p> <div data-bbox="662 1176 1428 1503" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> You only need guest and community user accounts if you are using Conga Digital Commerce. The guest and community user has standard security settings that control which parts of the storefront that guest users can access. These settings limit what guest users can access in the records that support the storefront.</p> </div> |
| Disable New User Email Notification | Enable this toggle If you do not want to send a welcome email to the new user. By default, it is disabled. |
| Enable One Time Migration for Reporting | <p>Enable this toggle to activate the Reports and Dashboard module for your tenant and perform a one-time migration of existing tenant data to make reporting data available. To learn more about reporting and dashboards, see Reporting and Dashboards.</p> |


Managing External Integration


The External Integration tab allows administrators to view and manage users authorized through external organizations. An Identity Provider (IdP) is a crucial component, particularly in the context of authentication and authorization processes. Its primary function is to manage and verify the identities of users within a system, allowing them access to resources based on their authentication credentials.

You can add one or more external integrations as per your business needs; however, you can make only one as a default IdP.


 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 Console** > **Organization**.
3. Go to the External Integrations tab.
4. Click **Add New**.
The Add New External Integration screen appears.
5. Choose **Identity Provider** from the drop-down list.
Based on the IDP selection, other fields are displayed. Follow the next steps for Salesforce, Salesforce Sandbox, and Microsoft IdPs.

 If you want to use the SAML 2.0 identity provider, click [here](#).


6. Click **Authorize** to open the selected IdP's login screen.
7. Log in with your credentials.
If you get any access-related prompts during this process, please allow full access. When you log in, the selected identity provider's external identifier auto-populates the External ID field.
8. Enter the **Type** of this integration. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc.
9. Add the description.
10. Enable the **Default IDP** toggle to make it a Default External Integration IDP.


 When the admin user creates new users, they are created with the default IdP. For example, if you have set Salesforce as the default IdP, all the new users will be created with Salesforce Idp.

11. Click **Save**.


Follow the same steps to add more external integrations.


To edit the external integration

1. Go to the External Integration tab.
2. Click the **More** () icon and select **Edit**.
3. Update the Type, Description, and Default IdP fields per your business needs.
4. Click **Save**.

 You can change the default IdP straight from the list page by selecting the Default IdP status of the particular external integration.

To delete the external integration

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

 You cannot delete the external integration in any of the following scenarios: An API connection is established with the external integration, a user(s) is assigned to the external integration, and only one external integration is available.

Adding SAML 2.0 Identity Provider

When you use SAML as an identity provider (IdP) on the Conga Platform, you need the Organization External ID, Metadata Location URL, and Organization ID Claim Type to configure it while adding the SAML IdP. You can use any SAML IdP (such as Okta, Microsoft Entra, and Salesforce) per your company policy.

Select one of the following topics for more information on adding SAML as an identity provider (IdP) for the Conga Platform:

- [Microsoft Entra \(Azure AD\) as a SAML Identity Provider](#)

- [Salesforce as a SAML Identity Provider](#)
- [Okta as a SAML Identity Provider](#)

Microsoft Entra (Azure AD) as a SAML Identity Provider


To add Microsoft Entra (Azure AD) as a SAML 2.0 external integration, you must first register an app in Microsoft Entra (Azure AD) to enable trust with the service provider (Conga Auth Service). After creating an app, you need the Tenant ID, Metadata Location URL, and Organization ID Claim Type details.

Step 1: Register an app in Microsoft Entra (Azure AD)


1. Log in to portal.azure.com.
2. Select **Microsoft Entra ID** and go to Enterprise Applications.
3. Click **New Application**, then click the **Create your own application** option.
4. Enter the app name.
5. Select the **Integrate any other application you don't find in the gallery (Non-gallery)** option.
6. Click **Create**.
7. Select the registered app.
8. Go to Single Sign-on and select **SAML**.
9. Click **Upload metadata file** and select the service provider metadata file. Use the following URL per your environment to download the service provider metadata file:
 - **Preview Environment:**
 - NA: <https://login-rlspreview.congacloud.com/api/v1/auth/Saml2>
 - EU: <https://login-preview.congacloud.eu/api/v1/auth/Saml2>
 - AU: <https://login-preview.congacloud.au/api/v1/auth/Saml2>
 - **Production Environment:**
 - NA: <https://login-rls.congacloud.com/api/v1/auth/Saml2>
 - EU: <https://login.congacloud.eu/api/v1/auth/Saml2>
 - AU: <https://login.congacloud.au/api/v1/auth/Saml2>
1. After uploading the metadata file, you can see the Basic SAML Configuration screen, where all metadata settings get auto-filled.
2. Click **Save**.
3. Click **Done**.

Step 2: Get the Tenant ID, Metadata Location URL, and Organization ID Claim Type details

1. Go to Enterprise Applications and select the registered app.
2. Go to Single Sign-on and select **SAML 2.0**.
3. **Metadata Location URL:** Under the SAML Certificate option, copy the **App Federation Metadata Url** which is the metadata location URL.
4. Open the App Federation Metadata Url in any of the web browsers.
 - **External ID:** Get the value of the entityid attribute from the root node of the XML. Copy the last ID (tenant ID) value which is the external ID.
For example, if the entityid value is `https://sts.windows.net/8831e6d9-dc6c-4cd1-9cc6-1dc2d4133195/`, the tenant ID is `8831e6d9-dc6c-4cd1-9cc6-1dc2d4133195`.
 - **Organization ID Claim Type:** Search for the tenantid claim; if it is available, use the URI attribute in the XML tag as the organization ID claim type. For example, `http://schemas.microsoft.com/identity/claims/tenantid`.

 If you don't see the TenantId, leave the Organization ID Claim Type field blank.

Step 3: Add Microsoft Entra (Azure AD) as an 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 Console** > **Organization**.
3. Go to the External Integrations tab.
4. Click **Add New**.
The Add New External Integration screen appears.
5. Choose **SAML 2.0** from the drop-down list.
6. Enter values in the following fields as per your SAML 2.0 external integration:

| Field | Description |
|-----------------------|--|
| External ID | Enter the External ID that you copied in Step 2. |
| Metadata Location URL | Enter the App Federation Metadata Url that you copied in Step 2. |

| Field | Description |
|----------------------------|---|
| Type | Enter the type of this integration. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc. |
| Organization ID Claim Type | Enter the organization ID claim type that you copied in Step 2. |
| Description | Add the description. |
| Default IDP | <p>Enable the toggle to make it a Default External Integration IDP.</p> <p>A user will be created for the external integration set as the Default IdP for the organization. For example, if you have set Microsoft Entra (Azure AD), a SAML Identity Provider, as the Default IdP, all the new users will be created with Microsoft Entra (Azure AD).</p> |

7. Click **Save**.

Review the step 4 if you want to configure the Single Sign-On (IdP-initiated flow).

Step 4: Configure Single Sign-On (IdP-initiated flow)

1. Go to Enterprise Applications.
2. Select the registered app and navigate to Single Sign-on.
3. Go to the **Attributes and Claims** section and add the following attribute as per your environment:

| Attribute | Details |
|--------------|--|
| redirect_uri | <p>Enter the Conga RLS App Url where the user should be redirected after authentication. Use the following URL per your environment:</p> <ul style="list-style-type: none"> • Preview Environment: NA: https://preview-rls09.congacloud.com EU: https://rls-preview.congacloud.eu AU: https://rls-preview.congacloud.au • Production Environment: NA: https://prod-rls10.congacloud.com EU: https://rls.congacloud.eu AU: https://rls.congacloud.au |

| Attribute | Details |
|-----------|--|
| client_id | The SPA Client ID for logging in. Use the following client ID per your environment: <ul style="list-style-type: none"> • Preview Environment: NA: rls-preview-spa EU: rls-preview-eu-spa AU: rls-preview-au-spa • Production Environment: NA: rls-prod-spa EU: rls-prod-eu-spa AU: rls-prod-au-spa |

4. Click **Save**.

Salesforce as a SAML Identity Provider

To add Salesforce as a SAML 2.0 external integration, you must create a connected app with SAML configuration in the Salesforce organization to enable trust with the service provider (Conga Auth Service). After creating the app, you need external_organization_id, Metadata Location URL, and Organization ID Claim Type details.

To set up Salesforce as a SAML identity provider, enable your organization as an identity provider and integrate your service provider as a connected app.

Step 1: Enable identity provider setting

1. Log in to Salesforce.
2. Go to **Setup**, then search and select **Identity Provider**.
3. Click **Enable Identity Provider**.
4. Select the self-signed certificate from the dropdown menu.
5. Click **Save**.

Step 2: Enable single sign-on setting

1. Search and select **Single Sign-On Settings**.
2. Click **Edit**.
3. Check the **SAML Enabled** checkbox.
4. Click **Save**.

Step 3: Create a SAML-enabled connected app

1. Search and select **App Manager**.
2. Click **New Connected App**.
3. Enter the following details in the **Basic Information** section:

| Field | Description |
|--------------------|---|
| Connected App Name | Enter the connected app's name, which is displayed in the App Manager. |
| 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. |

4. Fill in the following details in the **Web App Settings** section. Leave the other field as is.

| Field | Description |
|-------------------------------------|---|
| Enable SAML | Select the Enable SAML checkbox. |
| Entity Id | The globally unique ID of the service provider. Enter the following URL per your environment: <ul style="list-style-type: none"> • Preview environment: https://login-rlspreview.congacloud.com/api/v1/auth • Production environment: https://login-rls.congacloud.com/api/v1/auth |
| ACS URL | (Assertion Consumer Service) The service provider's endpoint that receives SAML assertions. Enter the following URL per your environment: <ul style="list-style-type: none"> • Preview environment: https://login-rlspreview.congacloud.com/api/v1/auth/Saml2/Acs • Production environment: https://login-rls.congacloud.com/api/v1/auth/Saml2/Acs |
| Name ID Format | Specify the email address as the format attribute sent in SAML messages. |
| Singing Algorithm for SAML Messages | Select the SHA256 option. |

5. Click **Save**.
6. Open the connected app that is created for the SAML identity provider.
7. Click **Edit Policies**.
8. Go to the Custom Attributes section and make sure to add the custom attribute with the external_organization_id as an attribute key and the organization ID as an attribute value.
9. Click **Save**.
10. Go to the User Accounts section and add a user account.
11. Go to the Profiles and Permission Sets sections and add profiles and permission sets to provide connected app access to Salesforce users.

With setup complete, you must get the information needed to configure an external integration.


Step 4: Get the external_organization_id and Metadata Location URL details

1. Search and select **Manage Connected Apps**.
2. Open the connected app that is created for the SAML identity provider.
3. Go to the Custom Attributes section and make sure the custom attribute is created with the external_organization_id as an attribute key and the organization ID as an attribute value.
4. Go to the SAML Login Information section.
5. Copy the Metadata Discovery Endpoint which is the metadata location URL.



- To use Salesforce as an SSO, use the organization's metadata discovery endpoint.
- To use Salesforce Community as an SSO, use the Community's metadata discovery endpoint.

Step 5: Add Salesforce as an 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 Console** > **Organization**.
3. Go to the External Integrations tab.
4. Click **Add New**.
The Add New External Integration screen appears.
5. Choose **SAML 2.0** from the drop-down list.

6. Enter values in the following fields as per your SAML 2.0 external integration:

| Field | Description |
|----------------------------|---|
| External ID | Enter the Salesforce Organization ID (18 digits). For more information on how to get the 18-digit organization ID, see Getting Salesforce Organization ID . |
| Metadata Location URL | Enter the Metadata URL that you copied in Step 4. |
| Type | Enter the type of this integration. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc. |
| Organization ID Claim Type | Leave this field blank. |
| Description | Add the description. |
| Default IDP | <p>Enable the toggle to make it a Default External Integration IdP.</p> <p>A user will be created for the external integration set as the Default IdP for the organization. For example, if you have set Salesforce, a SAML Identity Provider, as the Default IdP, all the new users will be created with the Salesforce IdP.</p> |

7. Click **Save**.

Okta as a SAML Identity Provider

To integrate Okta as a SAML 2.0 identity provider, you must create an app in Okta to enable trust with the service provider (Conga Auth Service). After creating an app, you need external_organization_id, Metadata Location URL, and Organization ID Claim Type details.

Step 1: Create an app in Okta

1. Log in to Okta.
2. In the Admin Console, go to Applications > Applications.
3. Click **Create App Integration**.
4. Select **SAML 2.0** as the sign-in method.
5. Click **Next**.
6. Provide the general information for the integration and then click **Next**.

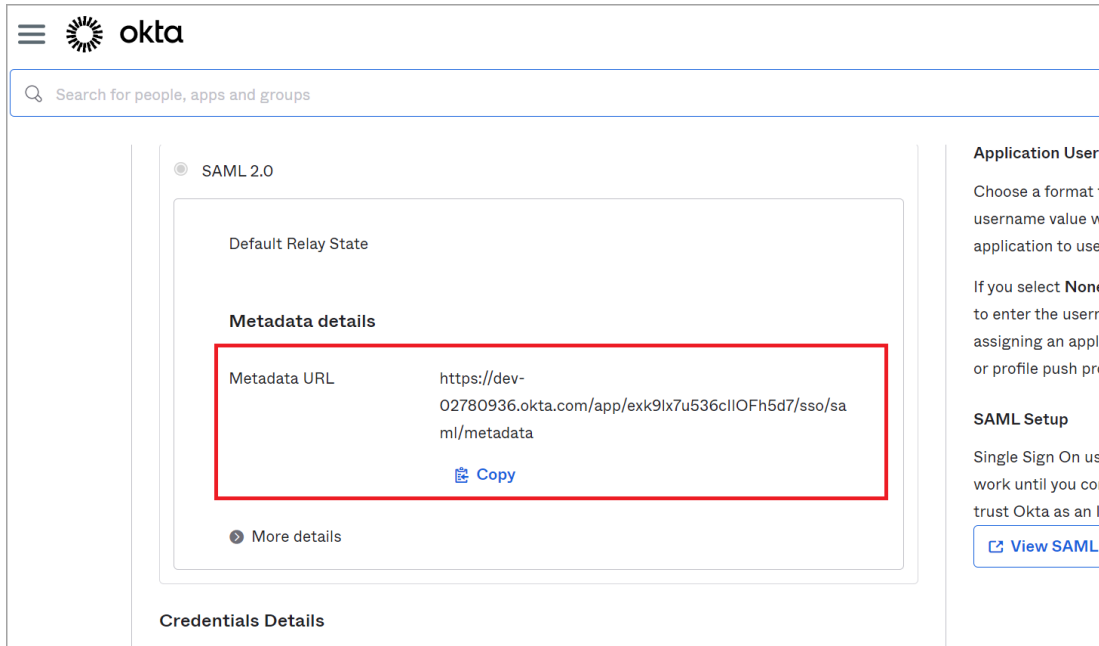
7. In the General section, enter and select details for the following:
 - a. Enter the following Assertion Consumer Service URL (ACS Endpoint) per your region-specific environment and check **Use this for the recipient URL and destination URL** checkboxes.
Preview environment:
NA: <https://login-rlspreview.congacloud.com/api/v1/auth/Saml2/Acs>
EU: <https://login-preview.congacloud.eu/api/v1/auth/Saml2/Acs>
AU: <https://login-preview.congacloud.au/api/v1/auth/Saml2/Acs>
Production environment:
NA: <https://login-rls.congacloud.com/api/v1/auth/Saml2/Acs>
EU: <https://login.congacloud.eu/api/v1/auth/Saml2/Acs>
AU: <https://login.congacloud.au/api/v1/auth/Saml2/Acs>
 - b. Enter the **Conga Platform Auth** endpoint in the Audience URI (SP Entity ID) field.
Preview environment:
NA: <https://login-rlspreview.congacloud.com/api/v1/auth>
EU: <https://login-preview.congacloud.eu/api/v1/auth>
AU: <https://login-preview.congacloud.au/api/v1/auth>
Production environment:
NA: <https://login-rls.congacloud.com/api/v1/auth>
EU: <https://login.congacloud.eu/api/v1/auth>
AU: <https://login.congacloud.au/api/v1/auth>
 - c. Select the **email address** option for the name ID format field.
8. In the Advanced Settings section, configure the following details:
 - a. **Attribute Statements:** Enter `external_organization_id` in the Name field and the unique value that is used as an external ID while configuring Okta as a SAML identity provider.
 - b. **SAML Request:** Click **Browse files...** and upload the signature certificate file (.CER file format). To generate the signature certificate:
 - i. Use the following URL per your region-specific environment to download the service provider metadata file.
Preview environment:
NA: <https://login-rlspreview.congacloud.com/api/v1/auth/Saml2>
EU: <https://login-preview.congacloud.eu/api/v1/auth/Saml2>
AU: <https://login-preview.congacloud.au/api/v1/auth/Saml2>
Production environment:
NA: <https://login-rls.congacloud.com/api/v1/auth/Saml2>
EU: <https://login.congacloud.eu/api/v1/auth/Saml2>
AU: <https://login.congacloud.au/api/v1/auth/Saml2>

- ii. Open the metadata XML file and go to the Base64-formatted X.509 certificate tag.
 - iii. Convert the Base64 to .CER format using this online tool.
 - iv. Copy the generated X.509 certificate with the header and save it with the .CER file extension.
- c. **Log Out:** Select and enter details for the following:
- i. **SLO Initiation:** Check the **Allow app to initiate single logout** checkbox.
 - ii. **Response URL:** Use the following URL per your region-specific environment:
 - Preview environment:**
 - NA: <https://login-rlspreview.congacloud.com/api/v1/auth/account/SamlLogout>
 - EU: <https://login-preview.congacloud.eu/api/v1/auth/account/SamlLogout>
 - AU: <https://login-preview.congacloud.au/api/v1/auth/account/SamlLogout>
 - Production environment:**
 - NA: <https://login-rls.congacloud.com/api/v1/auth/account/SamlLogout>
 - EU: <https://login.congacloud.eu/api/v1/auth/account/SamlLogout>
 - AU: <https://login.congacloud.au/api/v1/auth/account/SamlLogout>
 - iii. **SP Issuer:** Use the following URL per your region-specific environment:
 - Preview environment:**
 - NA: <https://login-rlspreview.congacloud.com/api/v1/auth>
 - EU: <https://login-preview.congacloud.eu/api/v1/auth>
 - AU: <https://login-preview.congacloud.au/api/v1/auth>
 - Production environment:**
 - NA: <https://login-rls.congacloud.com/api/v1/auth>
 - EU: <https://login.congacloud.eu/api/v1/auth>
 - AU: <https://login.congacloud.au/api/v1/auth>
9. Click **Save**.

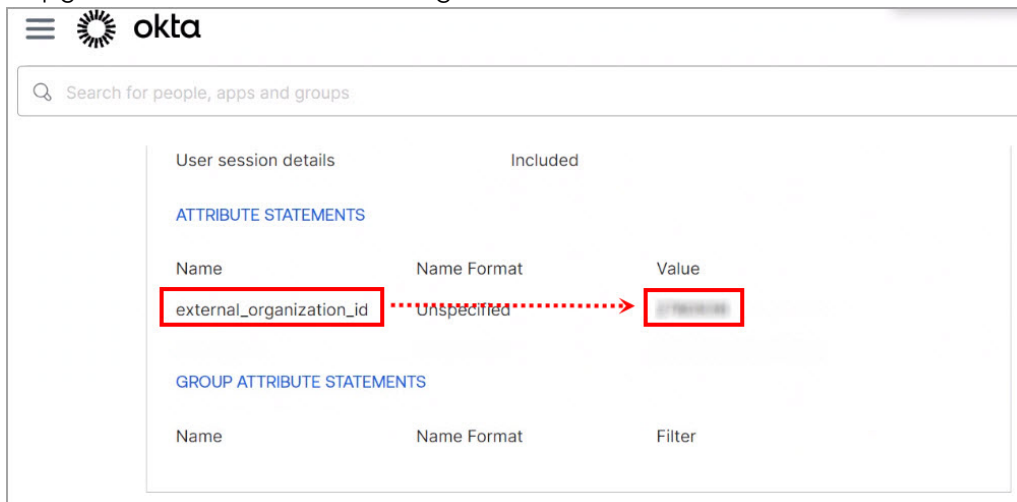
Step 2: Get the external_organization_id, Metadata Location URL, and Organization ID Claim Type details

1. Go to the application configured for authentication.
2. Open the **Sign On** tab and go to the SAML 2.0 section.

- Copy and save the Metadata URL value for use as a Metadata Location URL.



- Open the General tab and go to the Attribute Statements section.
- Copy and save the external_organization_id value for use as an External ID.



Step 3: Add Okta as an external integration


- Log in to the Conga Platform as an admin user.
- Click the App Launcher (☰) icon from the top-left corner > **Admin Console** > **Organization**.
- Go to the External Integrations tab.
- Click **Add New**.
The Add New External Integration screen appears.
- Choose **SAML 2.0** from the drop-down list.

6. Enter values in the following fields as per your SAML 2.0 external integration:

| Field | Description |
|----------------------------|---|
| External ID | Enter the external_organization_id value that you copied in Step 2. |
| Metadata Location URL | Enter the Metadata URL that you copied in Step 2. |
| Type | Enter the type of this integration. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc. |
| Organization ID Claim Type | Leave this field blank. |
| Description | Add the description. |
| Default IDP | <p>Enable the toggle to make it a Default External Integration IdP.</p> <p>A user will be created for the external integration set as the Default IdP for the organization. For example, if you have set Okta, a SAML Identity Provider, as the Default IdP, all the new users will be created with the Okta IdP.</p> |

7. Click **Save**.

Review the step 4 if you want to configure the Single Sign-On (IdP-initiated flow).

 Users should only use the IDP-initiated flow to log in to the platform after they have been explicitly onboarded through the Platform Admin Console.

Step 4: Configure Single Sign-On (IdP-initiated flow)

1. Log in to Okta.
2. In the Admin Console, go to Applications > Applications.
3. Select the application configured for authentication.
4. Open the General tab and go to the Attribute Statements section.
5. Add the following attribute details as per your environment:

| Attribute | Details |
|--------------|---|
| redirect_uri | <p>Enter the Conga Platform App Url where the user should be redirected after authentication. Use the following URL per your environment:</p> <ul style="list-style-type: none"> • Preview Environment: NA: https://preview-rls09.congacloud.com EU: https://rls-preview.congacloud.eu AU: https://rls-preview.congacloud.au • Production Environment: NA: https://prod-rls10.congacloud.com EU: https://rls.congacloud.eu AU: https://rls.congacloud.au |
| client_id | <p>The SPA Client ID for logging in. Use the following client ID per your environment:</p> <ul style="list-style-type: none"> • Preview Environment: NA: rls-preview-spa EU: rls-preview-eu-spa AU: rls-preview-au-spa • Production Environment: NA: rls-prod-spa EU: rls-prod-eu-spa AU: rls-prod-au-spa |

6. Click **Save**.

Getting Salesforce Organization ID

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

Salesforce Lightning:

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

| | |
|---|--|
| <p>To get organization's ID (18-digit) and Name</p> | <div style="border: 1px solid #ccc; padding: 5px; margin: 10px auto; width: 80%;"> <p>SELECT Id, Name FROM ORGANIZATION</p> </div> |
|---|--|

You can see the 18-digit organization ID as a result of the query.


The screenshot shows a software interface for running queries. At the top, there's a menu bar with 'File', 'Edit', 'Debug', 'Test', 'Workspace', and 'Help'. Below the menu, a tab labeled 'Organization@9:09 AM' is active. The main area contains the query 'SELECT Id, Name FROM ORGANIZATION'. Below the query, a blue header indicates 'Query Results - Total Rows: 1'. A table displays the results with columns 'Id' and 'Name'. The 'Id' value '00DHs000001Qp86MAC' is highlighted with a red box. Below the table, there are buttons for 'Query Grid', 'Save Rows', 'Insert Row', 'Delete Row', 'Refresh Grid', 'Access in Salesforce', and 'Create'. At the bottom, there are tabs for 'Logs', 'Tests', 'Checkpoints', 'Query Editor' (highlighted with a red box), 'View State', 'Progress', and 'Prol'. The 'Query Editor' tab shows the same query 'SELECT Id, Name FROM ORGANIZATION' highlighted with a red box. To the right, a 'History' panel shows 'Executed' and two entries for the query. At the bottom left, there is an 'Execute' button and a checkbox for 'Use Tooling API'.

Conga API Connections

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


i 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 Console** > **Organization**.
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 Console > Organization.**
3. Go to the Conga API Connections tab.
4. Click **Add UI-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 client name. |
| Description | Enter the appropriate description. |
| Redirect URI | Enter the UI Callback Endpoint. It is the site to which identification and access tokens are sent. <div style="border: 1px solid #ccc; border-radius: 5px; padding: 10px; margin-top: 10px;"> <p> You can also include comma-separated fully qualified multiple URLs if required.</p> </div> |
| Cors Origins | Enter the Domain Name present in the callback endpoint. It is the base URL of the origin server to enable cross site request. |
| 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 Schemas

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 a Picklist](#)
- [Creating and Managing a Dependent Picklist](#)
- [Managing Record Type](#)
- [Creating and Managing Search Settings](#)
- [Managing Complex Metadata](#)

Creating and Managing Objects


Objects in Schema Manager represent the business objects defined for your application, including fields that store your business object records' metadata (for example, such agreement object metadata as Agreement Start Date, Currency, Region, or Amount). Metadata is stored in object tables in the system, and fields represent columns in those tables.

The default view lists all fields that are 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 Console** > **Schema Manager**.
3. From the Objects list page, click **Create New Object**. The New Object screen appears.

4. Enter values in the following fields:

| Field | Description |
|-----------------------|--|
| Name | Enter a name (API name) for the object. The name can only include alphanumeric characters and underscores. You can enter up to 52 characters in this field. |
| Description | Enter a description of the object. When looking at a list of objects, a meaningful description may help you remember the differences between them. |
| Display Name | Enter a user-friendly display name for the object (for example, Wizard Input). This name is used to refer to an object on a user interface page. |
| Category | Enter a category name to associate this object with other objects or products. |
| Is Data Cache Enabled | Enable or disable the toggle to use caching for faster query performance. Caching is enabled by default. |
| Is Allow Owner Scope | <p>Enable this toggle to make the Record Owner field appear automatically when you create a new record. By default, this toggle is disabled.</p> <p>When you create a record, the system shows the Record Owner field along with the owner's details if you have enabled this flag for that object. Record ownership can be assigned to an individual user or a group of users.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For an object with the Is Allow Owner Scope flag enabled, the application creates a Record Owner field by default.</p> </div> |


5. Click **Save**.

You are directed to the object details page, where some default fields have been automatically created. You can now add more fields, picklists, complex fields, and search settings to the object. To learn more about fields, see [Creating and Managing Fields](#).


To update a custom object

1. Click the More (⋮) icon adjacent to the relevant object 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** is created but is not shown in the object listing screen.


4. Enable the **Is Allow Owner Scope** toggle to display the Record Owner field on a record.

 You can only enable the flag if you initially keep it disabled during the object creation. Once it is enabled, you cannot modify it.

5. Click **Save**.


To deprecate a custom object

 You can deprecate only custom objects.


1. Click the More () icon adjacent to the relevant custom object record 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.


 You cannot change the data type of a field once it is created. Additionally, you cannot delete a field if it is linked to other items such as objects, fields, or records.


To create a new field for a custom/standard object





1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner then go to Admin Console > 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 or select values in the following common fields:

 The field containing data type column information is only visible and appropriate to that specific data type. All other fields without a data type column are displayed for all data types.

| 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 | Accept this value or change it to override the default, which is auto-populated from the display name. For example, entering <code>Test 123</code> in the Display Name field auto-populates the field name as "Test_123". You can enter up to 58 characters in this field. | |
| Description | Enter a description of the field. This description will appear as additional information about the field's purpose or usage when you enable the Info Icon for the field in CX Studio. To learn more about enabling the info icon, see Managing Content Details View . | |
| | Data Type | Description |
| Default Value | Enter or select a default value for the field, depending on the data type. | |
| | <p> This field is only visible for Boolean, String, Currency, Date Time, Date, Picklist, MultiPicklist, Double, Decimal, Int, and Image data types.</p> | |
| Picklist Name | Picklist | Search and select the picklist that you will use for this new field. For more information on how to create a picklist, see Creating and Managing a Picklist . |
| Length | String | 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 orange; padding: 5px; margin-top: 10px;">  This field is only used for display purposes for the Currency data type. </div> |
| AutoNumber Initial Seed | AutoNumber | Enter the initial seed value. You can also add a prefix. |
| AutoNumber Prefix | AutoNumber | Enter the prefix to add to 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. |
| Complex Metadata Name | Complex and Complex Array | Search and select the complex metadata. Complex metadata is used to create a complex field by nesting multiple fields with different data types—such as strings or numbers—into a single field. For more information on creating complex metadata, see Managing Complex Metadata . |
| 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. This lists objects with fields that have a Reference data type. |

| | | |
|---------------------|---|---|
| Target Object Field | Rollup | <p>Search and select the field within the target object to be used for computation.</p> <p>The target object field must have a Double, Integer, or Decimal data type and have queryable, numeric, and non-formula fields.</p> |
| Rollup Function | Rollup | <p>Select the appropriate function that applies to the field that this field targets. This lists options according to the data type of the target object field.</p> |
| 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: 10px; margin-top: 10px;"> <p> This field is enabled by default if you enable the Is Queryable field.</p> <ul style="list-style-type: none"> • Except for Auto Number, Long String, Complex, and Image, this field is visible for all data types. </div> | |
| Is Required | <p>Enable this toggle to make this field mandatory.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Except for Auto Number and Rollup, this field is visible for all data types.</p> </div> | |
| Is Rich Text | LongString | <p>Enable this toggle to use rich text formatting with this field.</p> |
| Is Unique | <p>Enable this toggle to mark the field as unique. This prevents the creation of a new field with the same name.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> This field is only visible for String, Currency, Reference, Double, Decimal, and Int data types.</p> </div> | |
| Is Queryable | <p>Enable this toggle to indicate that this field can be used in the where clause. Queryable fields can be used in order by clauses as well.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> When you enable this field, the Is Sortable field is enabled by default.</p> <ul style="list-style-type: none"> • Except for Auto Number, Complex, Long String, and Image, this field is visible for all data types. </div> | |


| | |
|----------------------|---|
| <p>Is Calculated</p> | <p>Enable this toggle to indicate that this field is a formula field.</p> <div data-bbox="391 309 1428 436" style="border: 1px solid #ccc; padding: 5px;"> <p> This field is only visible for Boolean, String, Currency, Date Time, Date, Reference, Double, Decimal, and Int data types.</p> </div> |
| <p>Formula</p> | <p>Click Construct a formula here to open the Formula Builder, which allows you to 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 data-bbox="391 616 1428 705" style="border: 1px solid #ccc; padding: 5px;"> <p> This field is only visible 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**.


To delete the field


 You cannot delete out-of-the-box (OOTB) fields. Only custom fields can be deleted.


1. Click the More (⋮) icon for the relevant custom field from the list and select **Delete**.
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 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 length value. |
| 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. |
| 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. While saving the record, the Date Time datatype field converts the time to the user's or organization's time zone. |
| Date | <p>Allows the user to choose a date and designate the default date as either the current or a future date. Alternatively, the field can be left blank. The Date data type field must adhere to the yyyy-MM-dd format.</p> <div data-bbox="564 1599 1426 1765" style="border: 1px solid #ffc107; padding: 5px;"> <p> The date data type field does not perform any conversion upon saving a record. Instead, it preserves the exact value specified during input.</p> </div> |
| Auto Number | Automatically assigns a unique number to each record. Specify the initial seed for the first Auto Number record. Each subsequent record's number is incremented by one. |

| Data Type | Description |
|---------------|---|
| 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. |
| Complex | Allows the user to associate a complex metadata field with the object. Complex metadata is used to create a complex field by nesting multiple fields with different data types—such as strings or numbers—into a single field. For more information on creating complex metadata, see Managing Complex Metadata . |
| Complex Array | Allows the user to associate a complex metadata fields with the object. Complex metadata is used to create a complex field by nesting multiple fields with different data types—such as strings or numbers—into a single field. For more information on creating complex metadata, see Managing Complex Metadata . |
| Reference | Contains the 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. You can use lookup to show the record GUID as well as the name. |
| 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="564 1413 1426 1503" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> By default, lookup fields are queryable.</p> </div> |
| Identifier | 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. |
| LongString | <p>Allows the user to specify a text value up to 64K characters (minimum 1). You can limit this by specifying a length value 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 queryable, 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 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. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression,

determined by the selected object-field and/or subfield, appears on the right panel of the application.

2. Click **Insert** to add it to the expression.

i The **Is Pre-Computed** toggle is for formula expressions that involve cross-object fields. It allows you to control how cross-object field values are handled during the evaluation of a formula expression. Formula expressions are typically evaluated at runtime, meaning their values are calculated when needed. However, when dealing with cross-object fields in a formula expression, the Is Pre-Computed toggle comes into play.

- If the toggle is enabled, the cross-object fields used in the formula expression are computed before runtime.
- If the toggle is disabled, the expression fetches the values of cross-object fields at runtime, just before evaluating the formula.

Once a formula expression is defined, you cannot change the Is Pre-Computed flag. If it is initially set to FALSE, you cannot change it to TRUE later. For more information on cross-object formula expression, see [Creating Cross-Object Formula Expression](#).

3. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
4. Click any operator available below the expression window to add it to the expression.
5. Continue building your expression.
6. Click **Clear** to remove the entire expression, or manually remove it by pressing the Backspace key.
7. Click **Validate** to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed.
8. When you are finished, click **OK**. The expression you created is displayed in the Formula field.
9. Click **Save** to finish or **Save & Create New** to create more custom fields.

Types of expression and supported functions

This table shows the types of formula expression you can define.

| Types of Expression | Example |
|--------------------------------------|--|
| Lookup access | <ul style="list-style-type: none"> • Agreement.CreatedBy.Name (CreatedBy is a lookup consisting of ID and Name only) • Agreement.CreatedBy.Id • Agreement.Account.Id • Agreement.Account.Name |
| Field access | <ul style="list-style-type: none"> • Agreement.RecordType • Agreement.TotalAgreementValue • Agreement.Name |
| Field value comparison | <ul style="list-style-type: none"> • Agreement.RecordType = "NDA" • Agreement.RecordType != "MSA" |
| Datatype equality (field comparison) | <ul style="list-style-type: none"> • Agreement.CreatedDate == Agreement.ModifiedDate • Agreement.CreatedDate != Agreement.ModifiedDate |
| Mathematical operation | <ul style="list-style-type: none"> • Agreement.TotalAgreementValue * 2 • Agreement.TotalAgreementValue + 1000 • Agreement.TotalAgreementValue - 1000 • Agreement.TotalAgreementValue / 1000 • Agreement.TotalAgreementValue % 2 |
| Logical operations | <ul style="list-style-type: none"> • Agreement.Status != "Request" AND Agreement.Status != "InReview" AND Agreement.Status != "InAmendment" • Agreement.Status != "Request" && Agreement.Status != "InReview" && Agreement.Status != "InAmendment" • Agreement.Status != "Request" OR Agreement.Status != "InReview" • Agreement.Status != "Request" Agreement.Status != "InReview" |
| Conditional/Ternary operations | <ul style="list-style-type: none"> • Agreement.TotalAgreementValue > 100 AND Agreement.TotalAgreementValue < 500 ? 10 : (Agreement.TotalAgreementValue > 500 && Agreement.TotalAgreementValue < 1000) ? 25 : 0 |

| Types of Expression | Example |
|---------------------------|--|
| Built-in object operation | <ul style="list-style-type: none"> • Mathematical comparison operation: (Agreement.EndDate.Year - DateTime.Now.Year) >= 3 • String operation: Agreement.Account.Name.Contains("Conga") • String operation: ! Agreement.Account.Name.Contains("Conga") • DateTime operation: (Agreement.EndDate.Date - Agreement.StartDate.Date).TotalDays |
| Relational operation | <ul style="list-style-type: none"> • Agreement.TotalAgreementValue > 1000 • Agreement.TotalAgreementValue >= 1000 • Agreement.TotalAgreementValue < 10000 • Agreement.TotalAgreementValue <= 10000 |
| Functions usages | <ul style="list-style-type: none"> • FN.DAY(Agreement.StartDate) • FN.FIND("ABCD", "B") • FN.TODAY() |

Guidelines for Functions

When working with functions, use built-in C# syntax whenever applicable. For instance, consider the following expression:

```
FN.NOT(FN.ISBLANK(Agreement.Description))
```


This can be simplified using inbuilt C# syntax as:

```
!string.IsNullOrEmpty(Agreement.Description)
```

Creating Cross-Object Formula Expression

Regular Formula Fields vs. Pre-Computed Formula Fields

Regular formula fields are calculated when records are fetched, providing results in real-time. However, with the **Is Pre-Computed** toggle enabled, formula fields are calculated and stored as data during insertion.

 The **Is Pre-Computed** toggle is for formula expressions that involve cross-object fields. It allows you to control how cross-object field values are handled during the evaluation of a formula expression. Formula expressions are typically evaluated at runtime, meaning their values are calculated when needed. However, when dealing with cross-object fields in a formula expression, the **Is Pre-Computed** toggle comes into play.


- If the toggle is enabled, the cross-object fields used in the formula expression are computed before runtime.
- If the toggle is disabled, the expression fetches the values of cross-object fields at runtime, just before evaluating the formula.

Once a formula expression is defined, you cannot change the **Is Pre-Computed flag. If initially set as **FALSE**, you cannot change it to **TRUE** later.**

Cross-Object Fields in Conga Platform

The Conga Platform allows you to create and use cross-object fields in formula expressions, supporting complex data relationships.

These expressions are enclosed in double braces, like `{{Agreement.Account.AccountSource}}`.

 Creating cross-object formula fields may impact performance compared to standard formula fields.

Creating Cross-Object Formula Fields

When you define a cross-object formula field:

- The expression within `{{ }}` must start with the current object's name.
- Each subsequent field within the expression must be a reference or lookup field.
- The final fields in the expression can only be certain data types: String, Long String, Integer, Double, Decimal, Currency, Boolean, DateTime, Identifier, or Picklist.

Limitations

- You cannot use a formula field at the leaf level within the formula expression. Instead, include the formula directly within the required formula expression.
- Expression hierarchies are validated against lookup and reference field metadata when creating formula fields.
- Functions and other formula features can be used with cross-object formula fields.
- Cross-object formula fields are evaluated at runtime, similar to regular formula fields, and do not store values persistently.

Here's an example:

Formula1 = Agreement.ContractValue % 10

- Instead of creating Formula 2 as

```
Agreement.TAV * Formula1
```


- Do

```
Formula2 = Agreement.TAV * (Agreement.ContractValue % 10)
```

Creating and Managing a Picklist

Create a picklist to store values for reuse in many objects' fields; for example, use the same set of values globally for priority picklists (Agreement Severity, Account Rating, Order Priority) in different objects. 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 Console** > **Schema Manager**.
3. Use basic search to locate the object you will 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 default value in the **Display Text** and **Default Value** fields. The display text can be anything that identifies the picklist option and will appear in the Default Value field as the default value. The value is the displayed value in the picklist.
7. Order the picklist entries by entering a value in the **Sequence** field.
8. Click the **Add PickList Entry** link to add more entries.

9. Click **Create**.

 The picklist entry must have a unique value and sequence.

To update a picklist

1. Click the More (⋮) icon for the relevant picklist from the picklist list and select **Edit**.
2. Edit the **Display Text** and **Sequence** fields.
3. Enable or disable the **Is Deprecated** toggle to deprecate or un-deprecate the picklist entry.

 The system does not allow deprecating picklist values that are used in dependent picklists.

4. Click the **Add PickList Entry** link to add more entries.
5. When you're done adding entries, click **Save**.

To deprecate a picklist

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

 The system does not allow deprecating picklist values that are used in dependent picklists.


Creating and Managing a Dependent Picklist

Dependent picklists enable 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 for limiting the available choices in a dependent picklist based on the values selected in its controlling picklist. The dependent picklist maps the values in the controlling field to the corresponding values 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 a Picklist](#). For example, a Country object (e.g., USA) has two picklists named State and City.

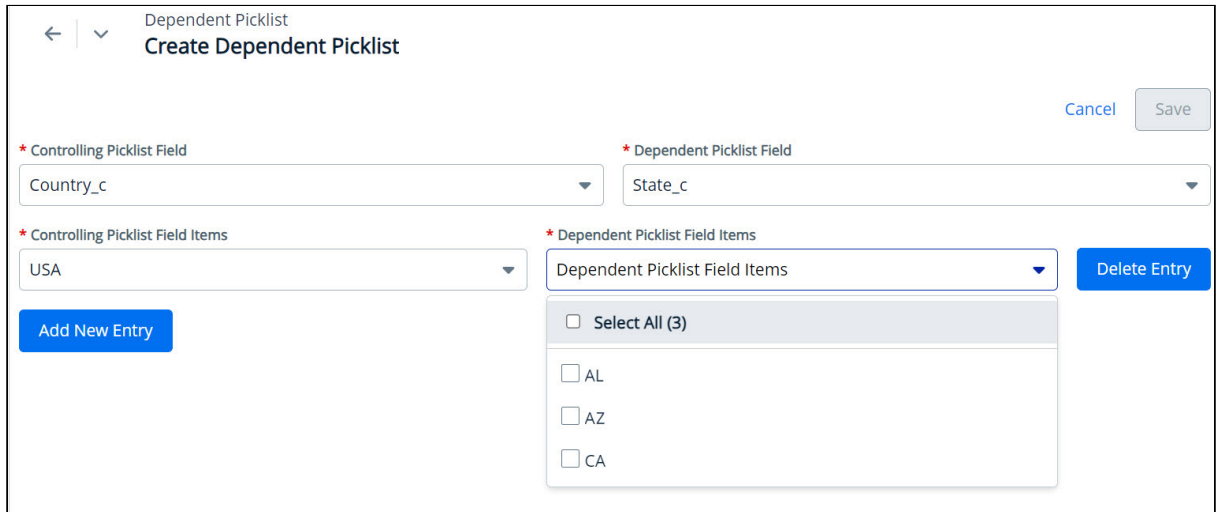
- State (controlling picklist) contains different state name values, such as Alabama, Arizona, California, etc.
- City (dependent picklist) holds values such as Los Angeles, San Diego, San Mateo, etc.

Now, if you select California as the State, the City field contains such values 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 Console** > **Schema Manager**.
3. Use Basic Search to locate the object to update. Click the object name to open the object's details.
4. Go to the Dependent Picklist tab and click **Create Dependent Picklist**.

The Create Dependent Picklist screen appears.



5. Enter values in the following fields:

 Picklists must be created and associated with an object before you define their relationship.

| Field/ Button | Description |
|----------------------------|---|
| Controlling Picklist Field | Select a controlling picklist (e.g. Country). 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). The values in this field change dynamically with the controlling picklist field selection.</p> <p>You can define multiple relationships between controlling and dependent picklist field items using these options:</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, AL, AZ, 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 Entry 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 a dependent picklist

1. Click the More (⋮) icon for the relevant dependent picklist from the dependent picklist list and select **Edit**.
2. Edit the **Controlling Picklist Fields Items** and **Dependent Picklist Fields Items** fields.
3. Click **Add New Entry** to add another controlling and dependent picklist field item relationship.
4. When you are done adding entries, click **Save**.

To delete a dependent picklist

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

Managing Record Type

The record type (transaction type) label groups records in an object and enables you to distinguish one transaction from another. Quotes, contracts, orders, products, accounts, and other transaction types commonly used in commercial transactions 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:



- Commonly needed account types, such as customer and partner accounts.
- Opportunity types from different revenue streams, such as online and retail.
- Contract types such as nondisclosure agreements (NDAs), master service agreements (MSAs), and statements of work (SOWs).

When you create a new object, the RecordType field appears as a picklist in the Picklist tab. You can add picklist values for the RecordType field 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 Console** > **Schema Manager**.
3. Use basic search to find the object you will 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 PickList Entry** link to add picklist values.
7. Enter the display text and default value in the **Display Text** and **Value** fields. The display text can be anything that identifies the picklist option and will appear in the Value field as the default value. The value is the displayed value in the picklist.
8. Order the picklist entries by entering a value in the **Sequence** field.
9. Click the **Add PickList Entry** link to add more entries.

10. When you're done adding entries, click **Save**.

 The picklist entry must have a unique value and sequence.

To update the picklist values


1. Click the More () icon for the relevant record type picklist entry from the record type list and select **Edit**.
2. Edit the **Display Text** and **Sequence** fields.
3. Enable the **Is Deprecated** toggle to deprecate the picklist entry.
4. To add a new picklist entry, click the **Add PickList Entry** link.
5. When you are done adding new picklist entries, click **Save**.


Creating and Managing Search Settings

In Schema Manager, you can modify search settings for both objects and fields. When this feature is enabled, the user can search. The records returned in 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 a 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 Console** > **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 Settings 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. |
| Type ahead | Select this checkbox to allow a type-ahead 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. |
| 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 between them. |
| Set Priority | It 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. |

5. Click **Save**. A confirmation message appears.


 Once search settings are created, the system starts a data sync from the Conga Platform to Elasticsearch. This ensures that the data in the target system remains consistent with the data in the source system for the specified object. Depending on the volume of the data, this may take a while. You can close the data sync progress popup by clicking the cancel icon and get on with your other tasks.

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 Settings tab.
3. Make the necessary changes.
4. Click **Save**. A confirmation message appears.

 Once search settings are saved, the system automatically starts a data sync. This ensures that the data for the specified object in the target system remains consistent with the data in the source system. Depending on the volume of the data, this may take a while. You can close the data sync progress popup by clicking the cancel icon and get on with your other tasks.

To delete search settings


1. Navigate to the Object Details page.
2. Go to the Search Settings tab.
3. Click **Delete**.
4. From the confirmation dialog, click **Confirm**.


Managing Complex Metadata

By defining a complex field in the object structure, you can store complex sub-documents as part of the data or record in the object. A complex metadata feature is used to create a complex field by nesting multiple fields with different data types—such as strings or numbers—into a single field. These fields can be used to collect data from multiple sources and present it in a more helpful format, such as a location or address.

 You can define complex fields using only primitive data types.

To create a complex metadata

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Schema Manager**.
3. Use basic search to locate the object you will update. Click the object name to open object details.
4. Go to the Complex Metadata tab and click **Create Complex Metadata**.
5. Enter a name for the Complex Field Metadata. This value appears in the Complex Metadata Name field when you create a new complex field for an object.
6. Under the Field Details, enter or select values in the following fields:

| Field | Description |
|--------------|---|
| Field Name | Enter a user-friendly field name for the field. |
| Display Name | Accept this value or change it to override the default, which is auto-populated from the field name. For example, entering <code>Test 123</code> in the field name auto-populates the display name as "Test_123". |
| Description | Enter a description of the field. |
| Data Type | <p>Select the data type from the list. Other fields are rendered based on the data type selection. For more information on default values and other fields related to specific data types, see Creating and Managing Fields.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> The Complex Field Metadata supports Boolean (true/false), String (text), Date Time (date and time), Identifier (unique identification), LongString (long text), Double (decimal numbers), Integer (whole numbers), and Date data types.</p> </div> |

7. Click the **Add Field** link to add more fields.
8. Click **Save**.

Sample of JSON metadata with a Complex field type

To understand the concept of a Complex Metadata field, let's consider a JSON example in which a complex field called PrimaryContact is nested within the Account object. The structure is defined in the ComplexFieldMetadata section labeled as PrimaryContactMetadata. This field has subfields like ID, Name, Phone], StartDate, etc. To query these subfields, mark them as IsIndexed.

Object definition for complex field type

```
{
  "Name": "Account",
  "DisplayName": "Account",
```

```

"Description": "Account",
"IsShared": false,
"Category": "CLM",
"FieldMetadata": [
  {
    "FieldName": "AccountType",
    "DisplayName": "AccountType",
    "Description": "AccountType Desc",
    "DataType": "String",
    "Length": 25,
    "IsRequired": false,
    "IsSortable": false,
    "IsUnique": false,
    "IsProtected": false,
    "IsDeprecated": false,
    "LookupObjectName": null,
    "PicklistName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsIndexField": false,
    "IsCalculated": false,
    "Expression": "string",
    "ExpressionDependency": null
  },
  {
    "FieldName": "PrimaryContact",
    "DisplayName": "PrimaryContact",
    "Description": "PrimaryContact Desc",
    "DataType": "Complex",
    "ComplexMetadataName": "PrimaryContactMetadata",
    "IsRequired": false,
    "IsSortable": false,
    "IsUnique": false,
    "IsProtected": false,
    "IsDeprecated": false,
    "LookupObjectName": null,
    "PicklistName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsIndexField": true,
    "IsCalculated": false,
    "Expression": "",
    "ExpressionDependency": null
  }
]

```

```

    }
  ],
  "ComplexFieldMetadata": [
    {
      "Name": "PrimaryContactMetadata",
      "Fields": [
        {
          "FieldName": "Id",
          "DisplayName": null,
          "Description": null,
          "DataType": "String",
          "DefaultValue": null,
          "IsProtected": true,
          "IsIndexField": true,
          "IsSortable": false,
          "IsRequired": false,
          "IsUnique": false,
          "IsDeprecated": false,
          "Length": 50,
          "LookupObjectName": null,
          "PicklistName": null,
          "ComplexMetadataName": null,
          "AutoNumberInitialSeed": 0,
          "Precision": 0,
          "Scale": 0,
          "IsCalculated": false,
          "Expression": null,
          "ExpressionDependency": null
        },
        {
          "FieldName": "Name",
          "DisplayName": null,
          "Description": null,
          "DataType": "String",
          "DefaultValue": null,
          "IsProtected": true,
          "IsIndexField": true,
          "IsSortable": false,
          "IsRequired": false,
          "IsUnique": false,
          "IsDeprecated": false,
          "Length": 50,
          "LookupObjectName": null,

```

```

    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  },
  {
    "FieldName": "Phone1",
    "DisplayName": null,
    "Description": null,
    "DataType": "Int",
    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": true,
    "IsSortable": true,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": null,
    "LookupObjectName": null,
    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  }
  {
    "FieldName": "StartDate",
    "DisplayName": null,
    "Description": null,
    "DataType": "DateTime",
    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": true,
    "IsSortable": false,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": null,

```

```

        "LookupObjectName": null,
        "PicklistName": null,
        "ComplexMetadataName": null,
        "AutoNumberInitialSeed": 0,
        "Precision": 0,
        "Scale": 0,
        "IsCalculated": false,
        "Expression": null,
        "ExpressionDependency": null
    }
]
},
"PicklistMetadata": [],
"DependentObjectMetadata": []
}

```

 Fields of data type Complex do not support sorting.

Sample of JSON metadata with a Complex Array field type

To understand the concept of a Complex Metadata field, let's consider a JSON example in which a complex array field called Products is nested within the PriceList object. The structure is defined in the ComplexFieldMetadata section labeled as ProductMetadata. It means that within the PriceList object, there is a field called Products which is of a complex array data type and has sub-fields like ID, Name, Product Code, etc.

Object definition for complex field type

```

{
  "Name": "PriceList",
  "DisplayName": "PriceList",
  "Description": "PriceList",
  "IsShared": false,
  "Category": "CLM",
  "FieldMetadata": [
    {
      "FieldName": "EffectiveDate",
      "DisplayName": "EffectiveDate",
      "Description": "EffectiveDate Desc",
      "DataType": "DateTime",

```



```

    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": true,
    "IsSortable": true,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": null,
    "LookupObjectName": null,
    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  },
  {
    "FieldName": "ExpirationDate",
    "DisplayName": "ExpirationDate",
    "Description": "ExpirationDate Desc",
    "DataType": "DateTime",
    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": true,
    "IsSortable": true,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": null,
    "LookupObjectName": null,
    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  },
  {
    "FieldName": "Products",
    "DisplayName": "Products",
    "Description": "Products Desc",

```

```

        "DataType": "ComplexArray",
        "DefaultValue": null,
        "IsProtected": true,
        "IsIndexField": false,
        "IsSortable": false,
        "IsRequired": false,
        "IsUnique": false,
        "IsDeprecated": false,
        "Length": null,
        "LookupObjectName": null,
        "PicklistName": null,
        "ComplexMetadataName": "ProductMetadata",
        "AutoNumberInitialSeed": 0,
        "Precision": 0,
        "Scale": 0,
        "IsCalculated": false,
        "Expression": null,
        "ExpressionDependency": null
    }
],
"PicklistMetadata": [],
"ComplexFieldMetadata": [
    {
        "Name": "ProductMetadata",
        "Fields": [
            {
                "FieldName": "Id",
                "DisplayName": "Id",
                "Description": "Id",
                "DataType": "String",
                "DefaultValue": null,
                "IsProtected": true,
                "IsIndexField": false,
                "IsSortable": false,
                "IsRequired": false,
                "IsUnique": false,
                "IsDeprecated": false,
                "Length": 25,
                "LookupObjectName": null,
                "PicklistName": null,
                "ComplexMetadataName": null,
                "AutoNumberInitialSeed": 0,
                "Precision": 0,
            }
        ]
    }
]

```

```


    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  }
  {
    "FieldName": "Name",
    "DisplayName": "Name",
    "Description": "Name",
    "DataType": "String",
    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": false,
    "IsSortable": false,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": 255,
    "LookupObjectName": null,
    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,
    "Precision": 0,
    "Scale": 0,
    "IsCalculated": false,
    "Expression": null,
    "ExpressionDependency": null
  },
  {
    "FieldName": "ProductCode",
    "DisplayName": "ProductCode",
    "Description": "ProductCode",
    "DataType": "String",
    "DefaultValue": null,
    "IsProtected": true,
    "IsIndexField": true,
    "IsSortable": true,
    "IsRequired": false,
    "IsUnique": false,
    "IsDeprecated": false,
    "Length": 100,
    "LookupObjectName": null,
    "PicklistName": null,
    "ComplexMetadataName": null,
    "AutoNumberInitialSeed": 0,

```

```

        "Precision": 0,
        "Scale": 0,
        "IsCalculated": false,
        "Expression": null,
        "ExpressionDependency": null
    }
  ]
}

```

 Fields of data type Complex Array do not support sorting, querying, or indexing


To update complex metadata

1. Go to the Complex Metadata tab and click the Complex Metadata Name link. The list of fields associated with the complex metadata appears.
2. Click the More (⋮) icon for the relevant field and select **Edit**.
3. Modify the required fields as necessary.
4. Click **Save**.

To add a field to existing complex metadata

1. Go to the Complex Metadata tab and click the Complex Metadata Name link.
2. Click **Create New Field**. The Create Complex Field screen appears.
3. Enter or select values in the following fields:

| Field | Description |
|--------------|---|
| Field Name | Enter a user-friendly field name for the field. |
| Display Name | Accept this value or change it to override the default, which is auto-populated from the field name. For example, entering <code>Test 123</code> in the field name auto-populates the display name as "Test_123". |

| Field | Description |
|-------------|--|
| Description | Enter a description of the field. |
| Data Type | Select the data type from the list. Other fields are rendered based on the data type selection. For more information on default values and other fields related to specific data types, see Creating and Managing Fields . <div data-bbox="343 683 1426 891" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> The Complex Field Metadata supports Boolean (true/false), String (text), Date Time (date and time), Identifier (unique identification), LongString (long text), Double (decimal numbers), Integer (whole numbers), and Date data types.</p> </div> |

4. Click the **Add Field** link to add more fields.
5. Click **Save**.

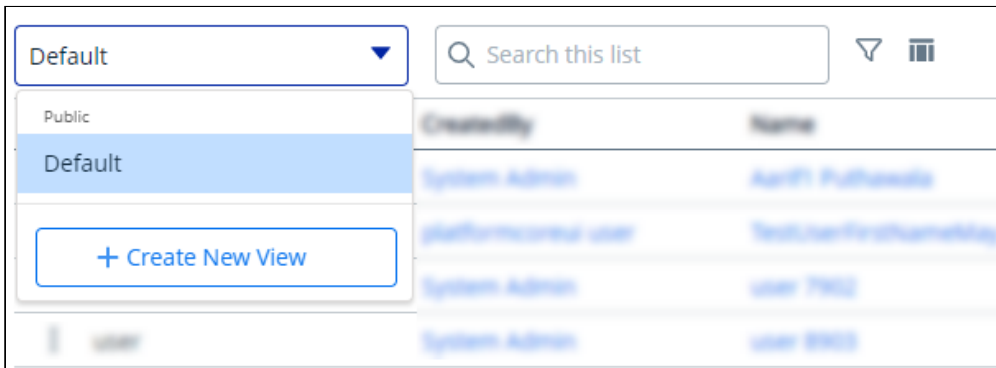
Managing Views

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 (list) view.

To save your personalized view

1. Log in to the Conga Platform as an admin user.
2. Go to the page containing the grid view you want to filter.
3. Customize your view by applying filter criteria:
 - **Filtering Options:** Use the available filtering options to set criteria for your 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](#).
 - **Managing View Settings:** Apply the view setting to control which columns to display in the grid view. For more details, see [Managing View Settings](#).
 - **Rows per Page and Page Number:** Specify the number of records to see per page using the Rows per Page option. Enter the page number in the designated box to set the default page when applying the view.
 - **Sorting:** Apply column sorting for better navigation.

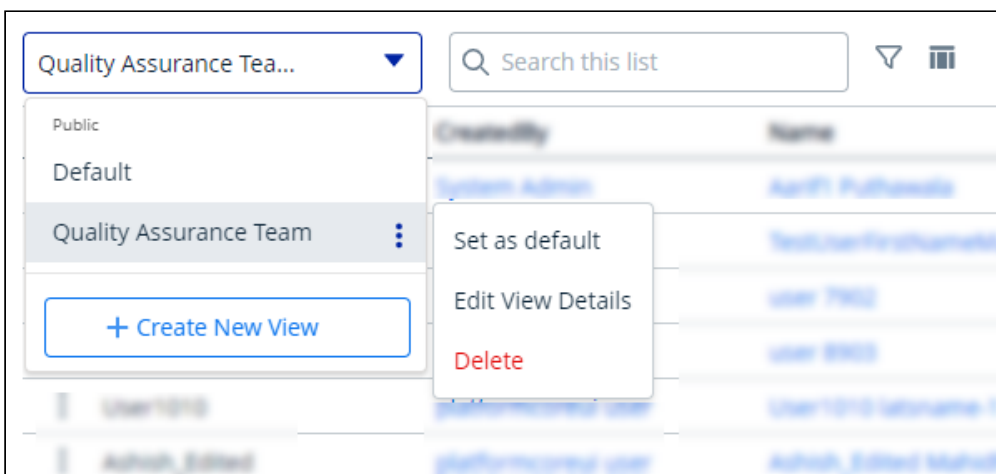
- Go to the dropdown menu next to the search bar and click **Create New View**. The Save View popup appears.



- Enter a name and description for your view.
- You can save your view as either Private or Public:
 - Private:** Select this to restrict the search view to yourself only. It remains private and accessible only to you.
 - Public:** Select this to permit others to access and use your search view. Your search view will be made public, allowing others to view and use the same search criteria.

i The application restricts Non-Admin users from creating public views. They can only view the views created by Admins and themselves, and they can edit or delete only their private views.

- Click **Save** to save your filtered view.
- To access your saved view, click the dropdown menu to the left of the search bar.
- Click the More (⋮) icon for the view from the list and select **Set as default**.



The grid view updates and displays records based on the saved filter criteria. The system retains the applied filter, showing it in the grid view when you return after switching screens.

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

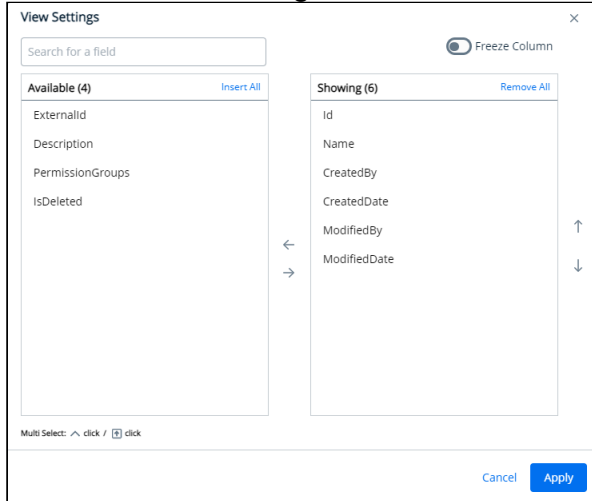
1. Click the More (⋮) icon for the relevant view from the list and select **Delete**.
2. From the confirmation dialog, click **Confirm**.



Managing 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

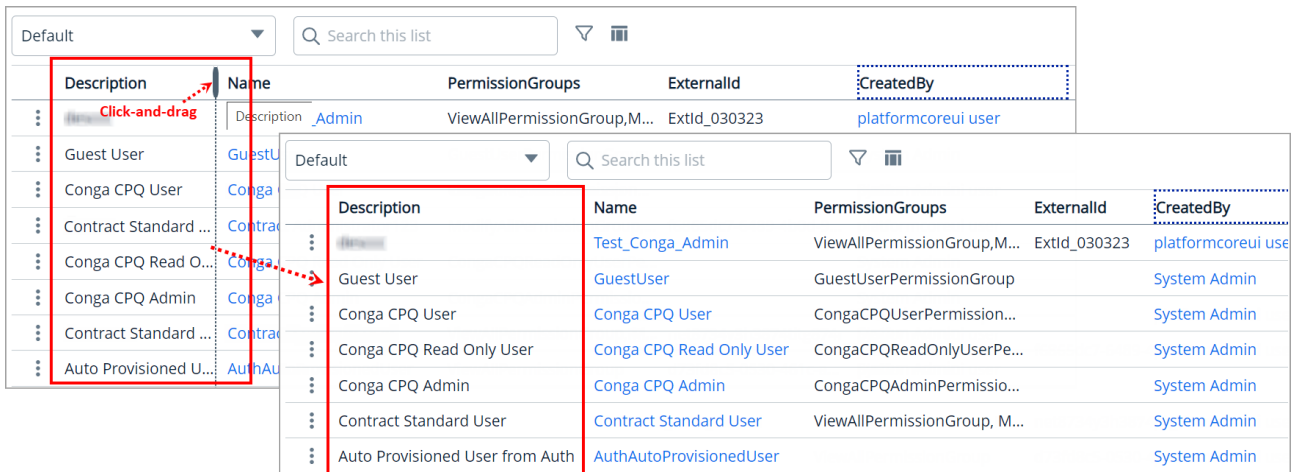
i When four or more column items are added to the showing panel, you can enable the **Freeze Column** toggle.

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 advanced search, the column filter criteria will not be retained, and the result will be displayed based on the keyword or advanced 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. You can use the Clear icon in the search field to remove the entire entered keyword at once.

To filter records using advanced search

1. Click the **Advanced Search** () icon to open the filter dialog. The Advanced Filter pop-up appears.
2. To specify the filter criteria, enter or select values for the following:

| Options | Description |
|----------|--|
| Field | Select a field to be used in the filter criteria. <div data-bbox="584 1397 1426 1603" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The application initially pulls the list of fields from the search settings, and if no fields are enabled for search for the object, it displays queryable fields from the database.</p> </div> |
| Operator | Select the logical operator from the drop-down. The operator defines the relationship between the field and its value. The list of available operators varies depending on the data type of the chosen field. |

| Options | Description |
|---------|---|
| Value | <p>Enter the value of the field. The type of value field depends on the field selected.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i</p> <ul style="list-style-type: none"> • For the Owner field, you can select an individual user or a user group. • The value field functions as a text field when using the Contains operator with the Picklist and Lookup fields. </div> |

- To add another filter criteria, click **Add Criteria** and repeat step 2.
By default, two or more rows share an AND (Boolean operator) relationship.
- Specify your logic in the Filter Expression field. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. In the absence of custom logic, the default relationship between the rows is the Boolean operator AND. For example, if you have five rows you can create a filter logic like (((1 AND 3) OR (2 AND 4)) AND 5).
- Click the **Delete** (🗑️) to remove one expression at a time.
- Click the **Remove All** to delete all expressions at once.
- Click **Apply** to filter the list of records based on the criteria you defined.

If you have already used a column filter, the application will show a warning message on the filter popup. Applying an advanced search will remove the column filter. You can see the total number of applied filters next to the Advanced Search icon.

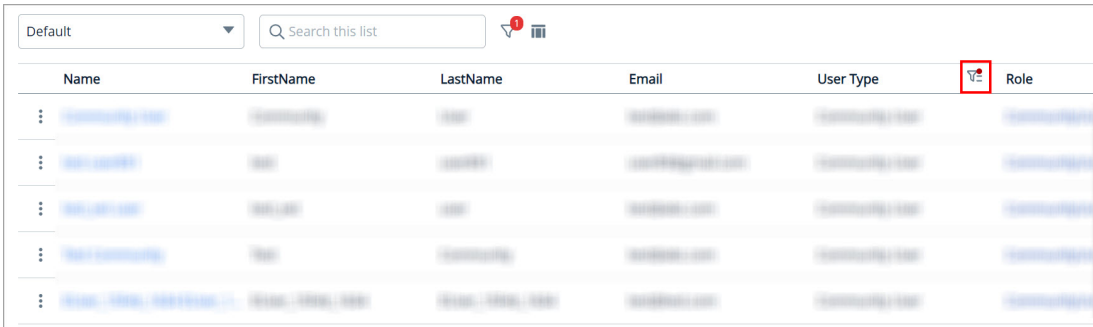
| Name | FirstName | LastName | Email | User Type | Role | CreatedBy |
|------|-----------|----------|--------------------|----------------|----------------|-----------|
| ⋮ | John | Doe | john.doe@conga.com | Community User | CommunityAdmin | John.Doe |
| ⋮ | Jane | Doe | jane.doe@conga.com | Community User | CommunityAdmin | John.Doe |
| ⋮ | John | Doe | john.doe@conga.com | Community User | CommunityAdmin | John.Doe |
| ⋮ | John | Doe | john.doe@conga.com | Community User | CommunityAdmin | John.Doe |
| ⋮ | John | Doe | john.doe@conga.com | Community User | CommunityAdmin | John.Doe |

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.

4. Click the **Apply** (✓) button.

If you have already used an advanced search filter, the application will show a warning message on the column filter popup. Applying a column filter will remove any applied advanced search filters and the column level filter will be added to the advanced search. A red dot will appear next to the filter icon for any applied column filter.



The screenshot shows a table with columns: Name, FirstName, LastName, Email, User Type, and Role. A search bar at the top contains 'Search this list'. A filter icon (funnel) is highlighted with a red box and has a red dot next to it, indicating an applied filter. The table contains several rows of user data.

| Name | FirstName | LastName | Email | User Type | Role |
|------|-----------|----------|-------|-----------|------|
| ... | ... | ... | ... | ... | ... |
| ... | ... | ... | ... | ... | ... |
| ... | ... | ... | ... | ... | ... |
| ... | ... | ... | ... | ... | ... |
| ... | ... | ... | ... | ... | ... |

Managing Roles and Permission Groups

Role and Permission Group management helps administrators 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](#)
- [Creating User Groups](#)

Understanding Role-Based Access Control

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):** Object permissions define the level of access or restriction a user has to a specific object. These permissions are usually granted through permission groups. You can use object permissions and read criteria to allow or restrict users from viewing or modifying all instances of an object. Additionally, you can control which actions users can perform, whether they are standard actions (like create, read, update, delete) or custom actions (such as activate or generate). Even if a user is restricted from viewing or modifying object records, you can grant access to specific instances through scope permissions. Both scope and action permissions fall under object permissions.
- **Record-Sharing Behavior:** If you have not granted Modify All, View All, or action permissions (Read or Update) from the object permissions, and if a user shares a record with another user using the Record Share facility, the application allows the user to modify or view that specific record based on the permissions provided when the record was shared. To learn more about sharing a record, see [Sharing Records with Users](#).
- **Field Permissions:** A field permission allows administrators to define and enforce access permissions at the field level for different user roles. This ensures that users have access only to the data they need, improving security and compliance within the system. Field-level access control enables administrators to limit user access to specific fields within an object.

Benefits include:

- **Enhanced Data Security:** By restricting access to sensitive fields, RBAC for fields helps protect critical information from unauthorized access or modification, reducing the risk of data breaches.
- **Improved Compliance:** RBAC ensures that only authorized personnel have access to certain data, which is essential for meeting regulatory requirements and maintaining compliance with data protection laws.
- **Tailored User Experience:** Users only see and interact with the data they need, which simplifies their workflow and reduces the risk of errors by preventing them from accessing irrelevant or sensitive fields.
- **Flexible Control:** The ability to set different access levels for different fields allows for granular control over data access, ensuring that permissions can be

tailored to meet the specific needs of different teams and roles within the organization.

For instance, if you have a Contract object with ten fields, you can configure the system so that certain user groups or roles can only view or edit specific fields while being restricted from others. For example, consider a scenario where a Contract object has fields like "Contract Name," "Amount," "Close Date," "Client Name," and others. You might want the Legal Team to monitor the contracts but not edit them. Using RBAC for fields, you can restrict the Legal Team to read-only access for "Contract Name," "Amount," and "Close Date," while preventing access to more sensitive fields like "Client Name" and "Internal Notes."

This table outlines the various access levels and their corresponding permissions for grid and detail views:

| Access Level | Grid View | Detail View |
|-------------------------------|---|--|
| Edit | Displays an edit icon next to the field value, allowing inline editing directly from the grid. | Shows an edit icon next to the field value, allowing edits. |
| Read-Only | Displays a lock icon next to the field. A validation message appears on hover when edit is attempted. | Field is disabled. A message appears on hover when interaction is attempted. |
| None (No Read or Edit Access) | The field is not displayed in the grid. | The field is not displayed in the record detail view. |


i Field-level access control is managed through Permission Groups > Object Permissions. By default, all fields within an object have full access (both Read and Edit) for all users. However, administrators can customize these settings to restrict access as needed.

For custom object layouts created via CX Studio, field-level edit permissions set in CX Studio take priority over general permission group access. Even if your role's Permission Group provides Edit access at the field level, you will not be able to edit values in the grid view columns or the record detail view fields unless they are explicitly set as "Editable" in the CX Studio layout properties. For more information, see [Managing Data Grid View](#) and [Managing Content Details View](#).

- **Record Type Permissions:** A record type permission allows administrators to define and enforce access permissions at the record type level for different user roles. This

ensures that users have access to specific record types when creating records. For instance, if an **Agreement** object contains two record types—Non-Disclosure Agreement (NDA) and Master Services Agreement (MSA)—an administrator can configure the system so that:

- All users can create records using the **NDA** record type.
- Only users with specific roles (e.g., Legal Team or Contract Managers) can create records using the **MSA** record type.


 Record Type level access control is managed through Permission Groups > Object Permissions. By default, all record types within an object are accessible to all users who have access to the object. However, administrators can customize these permissions as needed.

- **Permission Group:** A permission group is a collection of object permissions and field permissions. Permission groups can be assigned to individual users or roles. A permission group is not a separate object but rather a label or tag that 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 with predefined access to the system depending on its role. 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 the role and permission groups assigned to it. Logging into the application resolves the user's role, determining the associated permission group. 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 per the steps below. One record in Object Permissions contains access details for one object for a permission group.


- a. To evaluate the user's permission on any object, start by checking the View All & Modify All attributes, and Read Criteria in object permission.
 - If the Modify All is true, the user has full access (as per the Read Criteria) to all the instances of the object.

- You can also control which actions users can perform, whether they are standard actions (like create, read, update, delete) or custom actions (such as activate or generate).
- b. Even if a user is restricted from viewing or modifying object records, you can give access to some of the records through scope configurations. You have different levels of scope configurations as part of the Scope Permissions attribute in Object Permissions.
 - i. **Global Scope:** The admin can allow users to access object records based on some criteria. For example, you can configure access to all the agreements that are non-confidential.

 Criteria fields must be queryable fields that exist in the schema.

```
"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 the Agreement object. You can also have additional criteria similar to Global scope.

 The relationship field must be a lookup field that is queryable, and the lookup object name must be the User object.

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


- iii. **Account Scope:** The admin can allow the user (who created the account record or record owner as an individual user or part of the user group) to access a record if an account is tagged as an attribute value on the

object. For example, an agreement has two fields, PrimaryAccount and SecondaryAccount, both of which have a lookup relationship to the Account object. To consider the PrimaryAccount field for resolving account scope, specify the PrimaryAccount field while setting up the account scope for the Agreement object. Assume there is an Agreement Record (ARecord1) with account1 as the primary account. You can only access ARecord1 if you are the owner of the account1, part of the user group associated with the account1, or created it.

 To use account scope on any object, you must enable the **Is Allow Owner Scope** toggle for the Account object. For more information on owner scope toggle, see [Creating and Managing Objects](#).


```
"ScopePermissions": {
  "GLOBAL": "",
  "USER": "",
  "ACCOUNT": {"AccountScopeFieldName": "PrimaryAccount"},
  "CONTACT": ""
}
```

- iv. **Owner Scope:** The owner of the record will have access to the record automatically.

 To use owner scope on any object, you must enable the **Is Allow Owner Scope** toggle for the object. For more information on owner scope toggle, see [Creating and Managing Objects](#).

- v. **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, set the IsShared flag to true while defining the object. To store the shared records for an object, the application automatically creates a new object with the naming convention [ObjectName]_UserShare (e.g. Agreement_UserShare) when it is marked as shared. Any application-specific process like eSignature can share the record with recipients through record sharing. New entries can be created manually to enable participant sharing. You can also configure the access level for the shared records. You can set the value as 0 for read-only access and 1 for edit access.
- c. The user can perform different actions on an object record through the standard CRUD actions and you can have custom object-specific actions as well. For

example, you 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. Criteria-based action permissions can also be configured, either alone or as part of an action permission.

 Action permission criteria are only supported for READ action permissions.

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

```

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

```

The system evaluates record type access at runtime during access resolution. 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 or 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. The best practice suggests keeping object permissions granted to a single permission group.

i You can also assign out-of-the-box (OOTB) permission groups to control which applications non-admin users can see on the Conga Platform. For example, if you want your non-admin users to see and use only the Revenue Apps, you can assign them the Conga CPQ 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. In addition to the object permissions, you can also limit user access to specific fields within an object. This ensures that users have access only to the data they need, improving security and compliance within the system.

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.

2. **Read Criteria:** When Modify All object permission is not set, you can add the read criteria to filter the data and return only records matching the criteria. Users can also see the records that are shared with them. The table below summarizes a few examples based on specific conditions, showing what users are allowed to see in each scenario:

| Condition | Read Criteria | Scope & Record Sharing | Description |
|---|--------------------|---|---|
| ViewAll = true, ModifyAll = false, Read = true | Status = 'Request' | Not provided | Users can view records associated with the status request and records that are shared with them. |
| ViewAll = true, ModifyAll = false, Read = true | Not provided | Not provided | Users can view all records. |
| ViewAll = false, ModifyAll = false, Read = true | Status = 'Request' | Global Scope: Status = In Review User Scope: [{ "RelationshipFieldName = "ContractFacilitator" }] | Users can view records matching any of the following criteria: <ul style="list-style-type: none"> • Status is Request. • Status is In Review. • The current user is the Contract Facilitator. • The record is shared with them. • The owner of the record. |
| ViewAll = true, ModifyAll = true, Read = true | Status = 'Request' | Not provided | Users can view records associated with the status request and records that are shared with them. |


3. **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.
4. **Field Permissions:** In addition to the object permission, you can define and enforce access permissions at the field level for different user roles. Read Only and Edit attributes are used to control each field-level access control for the given object. By default, all fields within an object have full access (both Read and Edit) for all users. However, administrators can customize these settings to restrict access as needed.

 You cannot change the access control for system-generated fields (Created By, Created Date, Modified By, and Modified Date). For custom object layouts created via CX Studio, field-level edit permissions set in CX Studio take priority over general permission group access. Even if your role's Permission Group provides Edit access at the field level, you will not be able to edit values in the grid view columns or the record detail view fields unless they are explicitly set as "Editable" in the CX Studio layout properties. For more information, see [Managing Data Grid View and Managing Content Details View](#).


5. **Record Type Permissions:** In addition to the object and field level permissions, you can define and enforce access permissions at the record type level for different user roles. This ensures that users have access to specific record types when creating and viewing records. By default, all record types within an object are accessible to all users who have access to the object. However, administrators can customize these permissions as needed.
6. **Scope Permissions:** When both View All and Modify All object permissions are 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 three 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.

 Criteria fields must be queryable fields that are present in the schema.


- **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 the Agreement object.

 The relationship field must be a lookup field that is queryable, and the lookup object name must be the User object.

- **Account Scope:** The admin can allow the user (record owner or who created the account record) to access a record if an account is tagged as an attribute value on the object. For example, an Agreement has two fields, PrimaryAccount and SecondaryAccount, both of which have a lookup relationship to the Account object. If you want to consider the PrimaryAccount field for resolving account scope, specify the PrimaryAccount field while setting up the account scope for the Agreement object. Assume there is an Agreement Record (ARecord1) with account1 as the primary account. You can only access ARecord1 if you are the owner of the account1 or created it.

 To use account scope on any object, you must enable the **Is Allow Owner Scope** toggle for the Account object. For more information on owner scope toggle, see [Creating and Managing Objects](#).

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 Console** > **Users**.
3. Go to the Permission Groups tab and click **Add New**.
4. Enter values in the following fields:

| Field | Description |
|---------------|--|
| Display Value | Enter the display value (name) that is displayed as a name in the list view. |
| Value | Enter the unique value (name) for the permission group. You can enter up to 80 characters in this field. |
| Description | Enter a description of the permission group. |

5. Click **Save**.

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

- The application automatically adds the View All permission to the AppRegistry object, allowing non-admin users to view the Conga Platform Admin Apps. However, you can change the object permission if necessary.
- 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.

i The system automatically generates the "customcode" and "Configuration" object permissions upon the creation of a permission group.

3. Search and assign the required permission for the Object(s).
 - **Modify All:** Select this option to automatically grant all standard CRUD (Create, Read, Update, Delete) action permissions.
 - **View All:** Select this option to grant Read permission by default.
 - **CRUD Actions:** Manage individual permissions for standard CRUD operations (Create, Read, Update, Delete).
 - **Read Criteria:** Click the **Set** link in the **Read Criteria** column to set access criteria for specific objects. Use only queryable fields from the object to set the criteria.
 - **Custom Action Permissions:** Control which custom actions (e.g., activate, generate) users can perform. Click the **Set** link in the **Action Permissions** column to assign custom actions to specific objects.

The table below summarizes user permissions based on specific conditions and actions, showing what users are allowed to do in each scenario:

| Condition | Action | User Permission |
|---|--------|---|
| ViewAll = false, ModifyAll = false, Create = true | Create | User can create a record. |
| ViewAll = false, ModifyAll = false, Update = true | Update | User can update records only if they: <ul style="list-style-type: none"> • Own the record, or • Have edit access to a shared record. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The system throws a validation error if the user attempts to update a record accessible through permissions other than owner scope (global/user/account).</p> </div> |
| ViewAll = false, ModifyAll = false, Delete= true | Delete | User can delete records only if they own them. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The system throws a validation error if the user attempts to delete a record accessible through permissions other than owner scope (global/user/account).</p> </div> |
| ViewAll = false, ModifyAll = false, Read= true | Read | The user can view a record if any scope (global, user, or account) grants access, if they own the record, or if it is shared with them. |

4. Click **Save Object Permissions**.


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

To assign Field 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, navigate to the respective object and click the **Set** link in the Field Permissions column.
3. Apply the **Edit** and **Read Only** access to the respective fields. By default, all fields within an object have full access (both Read and Edit).

This table outlines the various access levels and their corresponding permissions for grid and detail views.

| Access Level | Grid View | Detail View |
|-------------------------------|---|--|
| Edit | Displays an edit icon next to the field value, allowing inline editing directly from the grid. | Shows an edit icon next to the field value, allowing edits. |
| Read-Only | Displays a lock icon next to the field. A validation message appears on hover when edit is attempted. | Field is disabled. A message appears on hover when interaction is attempted. |
| None (No Read or Edit Access) | The field is not displayed in the grid. | The field is not displayed in the record detail view. |


 You cannot change the access control for system-generated fields (Created By, Created Date, Modified By, and Modified Date).


4. Click **Save**.

To assign Record Type 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, navigate to the respective object and click the **Set** link in the Record Type column.
3. Assign access to the respective record field. By default, all record types are accessible to all users who have access to the object.
4. Click **Save**.

To add Scope Permissions

-  • Global and User scopes are only applicable when ViewAll/ModifyAll is not set up for the particular object.
- Only queryable fields are used to set read criteria for all global and user scopes.


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**, **User Scope**, or **Account 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 **applications, objects, records,** and **permissions to perform actions** on 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. You can also assign multiple permissions and permission groups to a user to grant access to all the assigned role permissions.

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 Console** > **Users**.
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 applications, objects, records, and permissions to perform actions on the Conga Revenue Lifecycle Platform. For more information on permission groups, click here . |

| Field | Description |
|-------------------|--|
| Admin Permissions | Select applications from the list that you want your non-admin users to access on the Conga Revenue Lifecycle Platform. For example, you can select "Users" and "View Document Management Application" to give your non-admin users access only to the Admin Console's Users section and the Document Management Apps. |

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.

Creating User Groups

User Groups enable administrators to create groups of individual users with specific roles and permissions. These groups streamline collaboration by bringing together users who share common interests, roles, or responsibilities. Administrators can not only create new groups but also include a mix of both groups and individual users within a single group.

Role-Based Access Control (RBAC) with owner scope

A specific user or a user group can own a record. For more information on access control, see [Role-Based Access Control](#).



To assign a user or user group as the Record Owner of a specific record, you must enable the **Is Allow Owner Scope** toggle for that object. For more information, see [Creating and Managing Objects](#).

Prerequisites

Users to be added to the group must already exist within the system. For more information, see [Managing Users](#).

To create a user group



1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > **Admin Console** > **Users**.
3. Go to the User Groups tab and click **Create User Group**.
4. Enter values in the following fields.

| Field | Description |
|-------------------------------------|---|
| User Group Name | Enter a unique name for the group. |
| Email | Enter the group email ID to receive the notification regarding the change of record owner. |
| Is Send Email to User Group Members | Enable this toggle to send email notifications to each user group member whenever there is a change in record ownership or notification is configured for the user group. |

5. Click **Save**. A confirmation message appears.

You can now add group members to the newly created group.

To add group members

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Users** > **User Groups**.
3. Search a specific user group using keyword search. For more advanced search options, use additional filters and logic. For more information, see [Filtering Records in the Grid View](#).
4. Click the More () icon located near the group name and select **Manage Members** option.
5. Click **Add User Group Members**.
6. Enter values in the following fields.

| Field | Description |
|-------------|---|
| Member Type | Select the User option to include a specific user to the group, or select the UserGroup option to add a user group as a group member. |
| Email | Search for and select a user or group name. |

7. Click **Save**. A confirmation message appears.

The newly added group members appear in the User Group Member list.

Managing Users

User management enables system administrator to create and manage users and their access levels on the Conga Revenue Lifecycle Platform. It provides all typical management controls of users, like creating, modifying, and deleting users. Apart from this, administrator can also control their access to the services through permissions.

- ✔ Use the user management user interface or REST APIs to manage the users on the Conga Revenue Lifecycle Platform.

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](#)

Adding and Activating Users

Adding users to your system involves defining their role, setting up authentication, assigning the right permissions, and ensuring they have the correct access level based on their type (Internal, Integration, Guest, or Community). Ensuring a streamlined process helps maintain security while ensuring users can perform their tasks effectively.

- **Internal User:** It is usually an employee or a direct member of the organization who uses the system for regular day-to-day operations. They are granted access to various features and data depending on their job role, department, and permissions defined by the organization's access control policies.
- **Community User:** It is an external user who interacts with a system, typically through a Community Portal or self-service platform. They are not internal employees but are often customers, partners, or other stakeholders outside the organization.
- **Guest User:** It is usually an external user who needs temporary or restricted access to specific areas of the system. They are not members of the organization and often have limited access rights. In the context of an e-commerce platform, a Guest User

often makes one-time purchases, browses products, or performs other actions that do not require long-term membership or login credentials.

- **Integration User:** It is a system account or service user that is created specifically to enable data integration between two or more systems (e.g., CRM, ERP, or analytics tools). This user does not represent a human user but is instead used for API connections, third-party integrations, or automated data syncs.


You can manage Conga Platform users using the User Administration user interface. 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, time zone, date and time format, and other preferences


To create a new user




- You can also create a new user by cloning the 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.
- A user will be created for the external integration set as the Default IDP for the organization. For example, if you have set the Microsoft Entra (Azure AD), a SAML Identity Provider, as the Default IDP, all the new users will be created with the Microsoft Entra (Azure AD). For more information on how to add/view external integration and set it default, see [Managing External Integration](#).
- If the **Auto Provision User Enabled** toggle is enabled and the admin user has added and authorized the external integration, other users from that external integration can log in to the Conga Platform with their credentials, and the user is automatically created on the Conga Platform. **For example**, suppose the admin user has integrated Salesforce as an external service and authorized it. In Salesforce, there are 10 users. Now, if the toggle is enabled, any of these users can log in to the Conga Platform using their Salesforce credentials. Once they log in, their account is automatically created on the Conga Platform. For more information, see [Viewing Conga Org Details](#).



1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Users**. By default, a list of users is displayed.



- Click **Add** to add a new external user or **Add Guest** to add a new guest user. The User Details screen appears.




 The Add Guest button only appears when the **Enable Guest & Customer Community User** option is turned on at the organization level. For more information, see [Viewing Conga Org Details](#). You only need a guest user account if you are using the Conga Digital Commerce product. This user has standard security settings that control what parts of the storefront guest users can access. These settings limit what guest users can access in the records that support the storefront.



- Enter values in the following fields:

 The fields on the screen vary depending on whether you create an external, community, integration, or guest user.


| Field Name | Description |
|------------|--|
| User Type | <p>Select the user type (Internal, Community, or Integration User) from the dropdown list.</p> <div data-bbox="341 1223 1426 1384" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p> The Community user type option is only available if the Enable Guest & Customer Community User option is enabled at the organizational level. For more information on how to enable it, see Viewing Conga Org Details.</p> </div> <div data-bbox="341 1397 1426 1697" style="border: 1px solid #ccc; padding: 5px;"> <p> Important</p> <p>Currently, you can create an integration user only through the API. Use the POST <code>/api/user-management/v1/users</code> and set the user type to "Integration" for user creation. Then, use PATCH <code>/api/user-management/v1/users/{integrationUserId}/secret</code> API to generate the integration user's client ID and secret for your business needs.</p> </div> |

| Field Name | Description |
|---------------|---|
| Federation ID | <p>Enter the user's federation 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. You can enter up to 2000 characters in this field.</p> <div data-bbox="341 607 1426 853" style="border: 1px solid #ccc; padding: 10px;"> <p> • For the Salesforce identity provider user, the user's unique Salesforce ID (18 digits) must be added as a federation ID. For more information on how to get the 18-digit user ID, see Getting Salesforce User ID.</p> <p>• Federation ID is optional for Conga IDP identity provider users.</p> </div> |
| Username | <p>Enter the user's unique user name. The Conga IDP user uses this username to log onto the Conga Platform. You can enter up to 255 characters in this field.</p> <div data-bbox="341 999 1426 1200" style="border: 1px solid #ccc; padding: 10px;"> <p> When the Conga IDP is set up as the default IDP, the system validates the username, which can include alphanumeric characters and must start with an alphabetical letter or number. It only allows the special characters underscores (_) and hyphens (-).</p> </div> |
| First Name | <p>Enter the user's first name. You can enter up to 255 characters in this field.</p> |
| Last Name | <p>Enter the user's last name. You can enter up to 255 characters in this field.</p> |
| Email | <p>Enter the user's email address. It must be a valid email address in the form: test@abc.com, test@abc.in, etc. You can enter up to 255 characters in this field.</p> |

| Field Name | Description |
|-------------------|---|
| Role | <p>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. For more information, see Managing Roles and Permission Groups.</p> <div data-bbox="341 607 1426 853" style="border: 1px solid #ccc; padding: 10px;"> <p> • When you create a guest user, the GuestUserRole role is automatically assigned to the guest user, therefore this field is not displayed.</p> <p>• For a community user, search and select the CommunityUserRole role.</p> </div> |
| Permission Groups | <p>Select permission group(s) from the list. Permission groups are assigned to users for additional access that is not part of the selected role. 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.</p> <div data-bbox="341 1115 1426 1597" style="border: 1px solid #ccc; padding: 10px;"> <p> • When you create a guest user, the GuestUserPermissionGroup permission group is automatically assigned to the guest user, therefore this field is not displayed; however, administrators can update the GuestUserPermissionGroup to allow or amend permission for any out-of-the-box and custom objects.</p> <p>• When you create a community user, the CommunityUserPermissionGroup permission group is automatically assigned to the user as part of the CommunityUserRole. Administrators can update the CommunityUserPermissionGroup to allow or amend permission for any out-of-the-box and custom objects.</p> </div> |
| Time zone | <p>Enter the keyword to search and select the time zone from the list.</p> <div data-bbox="341 1697 1426 1821" style="border: 1px solid #ccc; padding: 10px;"> <p> If you do not provide a time zone, the application uses the organization's time zone and assigns it to the user.</p> </div> |

| Field Name | Description |
|--------------|---|
| Locale | Enter the keyword to search and select the locale from the list. <div data-bbox="341 528 1426 651" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  If you do not provide a locale, the application uses the organization's locale and assigns it to the user. </div> |
| Currency | Enter the keyword to search and select the currency from the list. <div data-bbox="341 754 1426 878" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  If you do not provide a currency, the application uses the organization's currency and assigns it to the user. </div> |
| Alias | Enter the user's alias name. You can enter up to 255 characters in this field. |
| Language | Enter the user's language. For example, <code>en-IN</code> . You can enter up to 255 characters in this field. |
| Address | Enter the user's full address. You can enter up to 64000 characters in this field. |
| Phone Number | Enter the user's phone number. You can enter up to 255 characters in this field. |

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. If a user is created with an incorrect email address entry, the welcome email cannot reach its intended recipient. In such instances, use the **Resend Email** functionality. For more details, see [Working with Users](#).

Newly created users are in an active state by default. Based on the Timezone, Locale, and Currency selections, the Positive Currency Format, Negative Currency Format, Short Date Format, Log Date Format, Time Format, Decimal Symbol, Digit Group, Digit Grouping Symbol, and Negative Number Format information will be added to the new user. All of these fields can be changed while editing the user. For more information on how to edit a user, see [Working with Users](#).

Activating or Deactivating Users

An administrator can activate or deactivate existing users from the user details page. Users can be granted role-based activation and deactivation access. 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 Console** > **Users**. A list of users is displayed.
3. Click the More () icon next to the user name and select **Activate** or **Deactivate**.

Getting Salesforce User ID

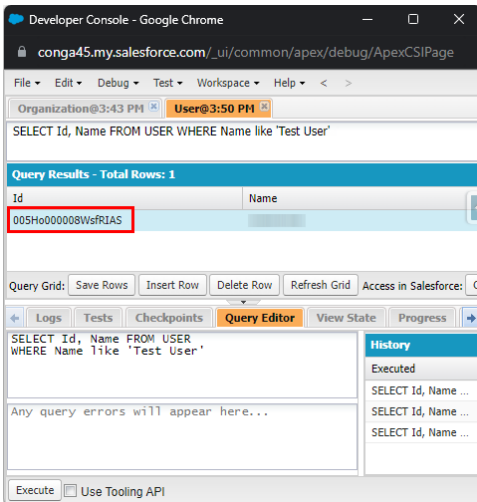
The Salesforce User ID is the unique identifier for your Salesforce user identity. Use the steps below to find it.

Salesforce Lightning:

1. Log in to the Salesforce org.
2. Click the Gear icon available at the top right corner of the screen.
3. Select **Developer Console**. The Developer Console window opens.
4. Go to the Query Editor tab.
5. Enter any of the following queries 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 edit mode.

i 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**.



- You can convert an external user to a community user, and vice versa, when the [Enable Guest & Customer Community User](#) option is enabled.
- You cannot convert a community user to an external user if the [Enable Guest & Customer Community User](#) option is disabled.
- If you change the user's external ID, the user is deactivated, and a new user is created with the updated external ID and all of the information from the deactivated user.

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.
The External ID is necessary for Salesforce or other Identity Providers (IDPs), except for Conga IDP.
4. Enter the user name. The username is necessary for Conga IDP login. For Salesforce users, it is only used for informational purposes.
5. Click **Save**.

To resend welcome email

1. Click the More (⋮) icon at the start of the user record.
2. Click **Resend Email**. A confirmation message appears.

A welcome email with login details has been resent to specified email address.

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 Console** > **Users**.
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 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.

To open Templates, navigate to the App Launcher () icon from the top left corner > Admin Console > Templates. By default, the template list page displays 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 placeholders for the object itself, 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 Console** > **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. |
| Tags | Enter tag(s) (metadata elements used to identify an email template) and press the Tab key. |
| Description | Enter a description for the email template. |
| Template Type | Select the template type as <i>html</i> , <i>text</i> , or <i>custom</i> . |
| Object Name | Select the object (for which the email template is to be set up) from the list. <div style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  This field is available only for the custom template type. </div> |
| Custom Code URI | Enter the custom code URI to perform advanced operations on the data used in the email contents as merge fields. For more information on how to create custom code resources and URI, see Developing Custom Code API . <div style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  This field is available only for the custom template type. </div> |
| Access Type | Select the template access type as <i>public</i> or <i>private</i> . |

| Field | Description |
|----------|--|
| Category | <p>Select the category from the list. This will help you manage the template based on the different categories or products.</p> <p>For example, you might have two categories: one for ABC products and another for XYZ products. Now, you can select the ABC Email Templates category for the ABC product-specific email templates, and the XYZ Email Templates category contains XYZ product-specific email templates.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  This field is available only for the public access type. </div> |
| 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 using the content editor. The email content editor lets you format rich text, adjust alignment, manage text color, font, size, and spacing.

- To add merge fields to the email body, use the JSON Data, Master Objects, and Custom Objects options. For more information, see [Working with Email Templates](#).
- To insert a picture into the HTML email content body, use the Image option. Enter the Image Data URI in the URL field. You can also adjust the image size and alignment in the Image Properties screen.

Image Data URI Sample

```
data:image/
png;base64,iVBORw0KGgoAAAANSUHEUgAAAKgAAAErCAMAAAB9xjhEAAAAdVBMVEX///
8AAADm5uYcHByUlJRXV1fw8PD09PSdnZ36+vrX19c/Pz+8vLyoqKj7+/
ve3t4wMDDGxsbq6uoWFhaGhoYNDQ1TU1PR0dGcnJxMTEw2NjZeXl60tLRpaWlkZGTCwsJ7e3shISFyc
nKMjIxDQ0MnJyelpaXanJy5AAAF2E1EQVR4n02c2UIqMRBEjaiIu+KuV8Ht/z/
xiisIVV6k6SfnQ5xXFkiKTdHfNbGwIIYQQqgghBBCCCGEEIIIIYQQqgghBBCCCGEEKI3BzfbgMtdb2
0LbAfIibe2eUZYZwjH3urm0GBCt7zVzfHAhA681f2yc8GEhj1vfT+cUp1r5P0TF7rvre+bEXd+fdb9V
URnuPZW+MV5T0itt8IvYjpD2PSW+EHU+RDevDV+8BwXuh7e38aFroX3xwk6wzqc9bZShF56q3xnP0Vo
OP0WubGZpHMN1v1bmtAXb50bL2lCw46zzkTnQzh0FnqYKntbWehdqLdndb+TrNPZ+/
t0oXeuQtOdD2HoKTRDZ7h31PmYI9Rzv/+XI9TR+
+EgS6if95HGw1/81v0kT+iF236f53wIB0469zJ1hn90Qq0NhyVGPkLHQm72FA19dNEJnT+FFv0f72H5
iQ+pFy7XfFR+3pBjv4f3UM17wXmCXntyELqLxGyppoTDukf0zxrh+Ap72l0nLELOZ69CoZPuQuHKvpq
9ik8B3YXeACHjo9mr+FzV2/szJ0Th42U8Ipt0FgrLz68TEqz6Xjuve7hLjiL/
y0d3uBtDJ007goNfjc+rQjfg3PunB477u12FwunnzzTxGgrt6j0S8duvxT0Int7Dy+ScCHgw6Rk0gM7
PXc7x5tTP+9Er0jD3Q3jy2M97qGG+1BiiqkrjwBGWnwtNG5yI6RYyY2HhVYI3pye0+mEx+LFgQLcvc
```

```

K4k1BYaPwZzaKTYDfv4Zr/E3KBVVWngBHcc/7GBfHm1GfdQ+eXro/4YNLFe/jVW6oycIijh/
e4DbL0o3hz6hEug0tkuQtyBIX2CJnAufeKWQI07bUPmeDL+Io0PQ7AvjYXChsPq+bcJFLcPFgIY9crz
cSz0tbe47n3yo8I5w5ah0zgzWh1gUGSHI2DBnD6CY5ueHNqGzDCax40v3BLt633e059tPoXSGaz6cAR
XsHhYAYLbRoygX8Vjrhx1dzSe2wk3LtJSKLhfg8/
nhv4K2RzauF9CLZpSIAdV83twmV4Kkn2bhKNarbu8Ymd/
BLZnJqFTGD5SbtJ0KzdKmCEq0ran8Mt3VYBo8IJJ4mVN/IervlIXgDfnNMmYIQ/
mcgHQ7InTc560HYd2WJIjquJ95for8WKdJKMe2igE4+4ovdVkZscG6x7vMNEDxfkttEG4TLc7bzeikB
WU33vcRFio/
qwmd71a6C69zmx6xxqex+567ecceV1nxW7zqJyuCxy16+ByuGyZjorBw0yY9dZVPU+M3adRVXvW635G
QPQDSoh4a5fAxXDZfmx6xwm1XQepdz1W8642n6fHbjPpFrIJ0muXwPVQiaW/
KxFJZ3J934WU8n7xLt+DUzqCE2739vCSZV13975SkGD5Lt+DVRZ9+ShU9WYVtDZqvxcPIL3PZyvEi5r
VX4uYvee5EL2NjM5I8das/e48VCQtCHHRbP3+K7fguwSOYDfGs/5pLdZYNyIhL/
NIRNcfhbds0HaA8anV+Hys6h4JGW3MWCE37ioJMPBZ6P35Ntft1twiV2WT93j6iQffFNjMnQULsVOFw3
b2uEqD96T8LB1l4VGAJvyGnS/2iZxxCr9NM3ARUnzSxeMqQ8iEzIXL60bifXG4DE/
ap+XVGBnff3+fcMvJMMtgT4Ur9J58nSzTIRj4KPaeNB4sdTjpZBWue/
y1N1xIeG+w60pMGg+2308Uv3HRfkeSVbZDLiLiigJGuAjZt5UNbCJQcCYjjQdjA2Y4xw9d4D1x3jrGI
I+JKvCeBEGsgyE2Ac4PFuL3Mo/YsVMjP2BE/
mt7WIm4lf0pkMLWHgVgj9vL9J6sTN029Al7gGHmMYJc62rchkaaw5nBQjL3rtFvZ03XvHfC5edJjak1
O5RmeU+cn1TQSR/
+nBUmJ+eG0tN1fBdu3lPrbscDgHlb+uQ4oD8wcHiCkRBCCCGEEIIIIYQQQgghhBBCCCGEEIIIIYQQQg
ghB0M/eatGasKKoDwAAAAASUVORK5CYII=
    
```

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)**.

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 any necessary changes to the email template fields and 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

 To include system audit fields (CreatedDate, CreatedBy, UpdatedDate, and UpdatedBy) in the reverse data sync from Conga Platform to Salesforce, you need to:


- Map the Conga Platform fields to the corresponding Salesforce fields. For more information, see [Creating and Managing Object Mappings](#).
- Enable the permission to create audit fields for standard profiles in Salesforce. For more information, see [Enable the permission 'Create Audit Fields' for standard profiles](#).

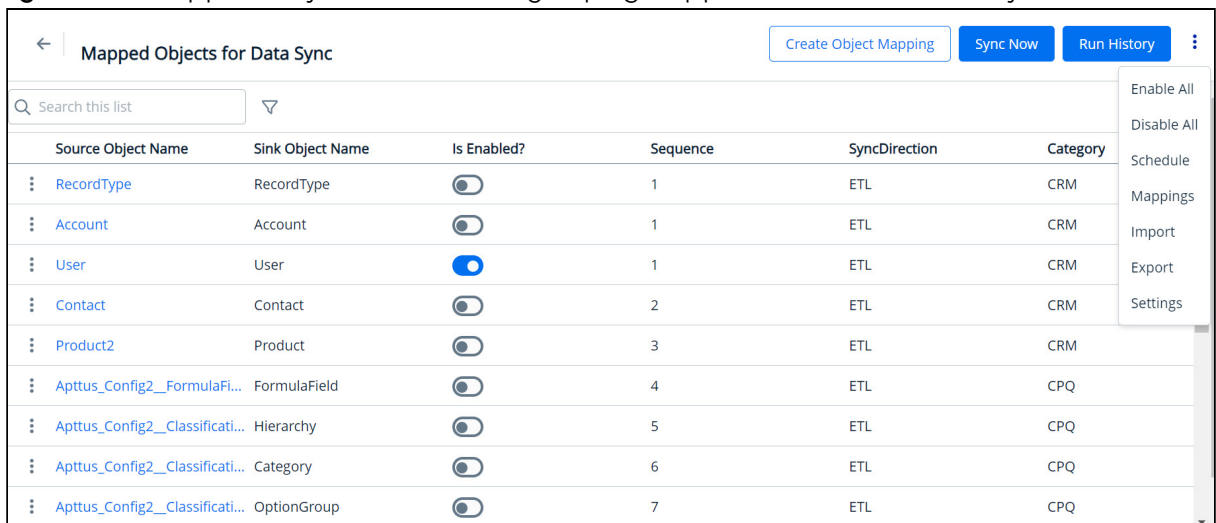
Navigating to the Data Sync User Interface

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 Console** > **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, you must synchronize data from the source system to the Conga Platform. Before synchronizing data, you must connect the source and target systems. This section provides guidance on how to configure this connection.

 Data Sync currently supports only Salesforce as the source system.

You may come across source object fields that use formula expressions, for example, to calculate the net price of a line item using the formula $\text{SalesPrice} * \text{Quantity}$. 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. For more information on transforming formula expressions, see [Creating Formula Fields](#).

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 Console > 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, Email Notification, 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. Go to Setup > Identity > OAuth and OpenID Connect Settings.
- c. Toggle **Allow OAuth Username-Password Flows** on.

Salesforce Settings

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

 Salesforce settings are mandatory to enable seamless data sync operations. Ensure that the information you enter in Salesforce Settings belongs to the Salesforce Org ID (External ID) that has been authorized for the external integration. For more details, see [Managing External Integration](#).

| Field | Description |
|-----------|--|
| Username | Enter your Salesforce account username. |
| Password | Enter your Salesforce account password. When you enter the password, dots replace the characters for security reasons. To see or hide the characters, click the eye icon. |
| 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 in this field. When you enter the security token, dots replace the characters for security reasons. To see or hide the characters, click the eye icon.</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 Client Secret | <p>Enter the consumer key generated after creating the connected app.</p> <p>Enter the consumer secret generated after creating the connected app. When you enter the client secret, dots replace the characters for security reasons. To see or hide the characters, click the eye icon.</p> <p>For more information on creating a connected app and getting the client ID and 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".</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p> The system does not currently support URLs formatted for Lightning mode, which end with ".lightning.force.com".</p> </div> <p>For example, use "https://<domainname>.my.salesforce.com/" URL instead of "https://<domainname>.develop.lightning.force.com/" URL.</p> |
| Salesforce API Version | <p>Enter the latest version in vVersionNumber (e.g., v61.0) format. 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.

 Platform settings are required for seamless data sync operations.

| Field | Description |
|---------------|---|
| Client ID | Enter the client ID generated after creating the API-to-API connection. |
| Client Secret | Enter the client secret generated after creating the API-to-API connection. When you enter the client secret, dots replace the characters for security reasons. To see or hide the characters, click the eye icon. For more information on creating the API-to-API connection and getting the client ID and secret, see Conga API Connections . |
| Token URL | Enter the region-specific Conga Platform token URL. For example: Preview Environment: NA: https://login-rlspreview.congacloud.com/api/v1/auth/connect/token EU: https://login-preview.congacloud.eu/api/v1/auth/connect/token AU: https://login-preview.congacloud.au/api/v1/auth/connect/token Production Environment: NA: https://login-rls.congacloud.com/api/v1/auth/connect/token EU: https://login.congacloud.eu/api/v1/auth/connect/token AU: https://login.congacloud.au/api/v1/auth/connect/token |

Email Notification Settings


You can set email notifications for the following data sync events:

- Sync Start: when a data sync begins
- Sync Completion: Once the data sync process is completed
- Sync Failure: In case of a data sync failure

Go to the Email Notification Settings tab and enter values in the following fields:

| Field | Description |
|-------|---|
| To | Enter the recipient's email address. You can add multiple email addresses using commas. You can also add recipients in the Cc and Bcc fields. |
| From | Enter the sender's email address. The system uses the default email address if left blank. |

| Field | Description |
|------------------------------------|--|
| Enable Sync Start Notification | Enable this toggle to send a notification when a data sync begins. |
| Sync Started Template | Search and select the email template for the sync start notification. The default template is filled in automatically. |
| Enable Sync Failed Notification | Enable this toggle to send a notification when a data sync fails. |
| Sync Failed Template | Search and select the email template for the sync failed notification. The default template is filled in automatically. |
| Enable Sync Completed Notification | Enable this toggle to send a notification once the data sync process is completed. |
| Sync Completed Template | Search and select the email template for the sync completed notification. The default template is filled in automatically. |

 If you do not select a specific email template, the system uses the default template to send notifications. You can create a new template or make changes to the default template. For more information, see [Managing Email Templates](#).


Custom Settings

Go to the Custom Settings tab and select the desired option to sync CLM/CPQ product data. 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. |

| App-Specific Sync Options | Description |
|---------------------------|---|
| CPQ Displays | Holds information about fields displayed in the 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 legacy custom settings. |
| 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 (consumer key) and client secret (consumer secret).

Prerequisites:

- Callback URL of your Salesforce org: The callback URL is your domain URL (Setup > My Domain).

To create a connected app

1. Log in to the salesforce portal as an administrator.
2. Go to **Setup**. In the Quick Find box, Enter **App Manager** and click **App Manager** in the suggestions . 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. For example, RLSInstance. |
| 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. |
| Enable for Device Flow | Select this to enable the connected app for an external application. |
| Callback URL | Enter the callback URL. Based on the instance URL, the Callback URL is generated by default when you select the field Enable for Device Flow. For example, d6g000006vxxxxxx--rlpstg12.sandbox.my.salesforce.com. You can also add other URLs in separate lines. |
| Use Digital Signatures | Leave this option unchecked. |
| 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. |
| Require Secret for Refresh Token Flow | Select this option to include the connected app’s client secret in the authorization request of the refresh token flow. If you don’t select this option and a connected app sends the client secret in the authorization request, Salesforce still validates it. |

| Fields | Description |
|--|--|
| Enable Client Credentials Flow | Select this option to let this connected app use the OAuth client credentials flow. |
| Enable Authorization Code and Credentials Flow | Select this option to let this connected app use the Authorization Code and Credentials Flow. This flow is supported only for Experience Cloud users. |
| Introspect All Tokens | Select this option to authorize a single connected app to introspect all access and refresh tokens within the entire org. As part of the authorization process, the authorization server validates, or introspects, the client app's access token. If the access token is current and valid, the client app is granted access. For more information, see OpenID Connect Token Introspection. Enabling this option reduces repetitive token requests during each login, minimizing the need for multiple logins to Salesforce. |


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

 Changes can take up to 10 minutes to take effect.

After you create a Connected App, the system generates a **Consumer Key** and **Consumer Secret** to enhance the security of your connected app. The consumer key serves as a unique identifier for the customer within the Salesforce system, while the consumer secret validates the ownership and authorization associated with the consumer key.

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. Go to Setup. In the Quick Find box, Enter **App Manager** and click **App Manager** in the suggestions.
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. In the Consumer Details section, click Copy next to Consumer Key and Consumer Secret and save them 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 Console** > **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**.

- Click the Transform () icon. The Target Field Name, Target Formula Expression, and Target Field Type are auto-populated in the RLP-compatible format. If you want to change the Target Field Name or Type, hover over the item and click the pencil icon that appears next to it.

| 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 " + APTTestObject_c.N... | String |

- 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 Revenue Lifecycle Platform (RLP). 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 can not only map target fields to source fields but also transform target field values to match the format the Conga platform can handle if they are written differently or in an incompatible format.

 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](#).

 Out-of-the-box (OOTB) objects and fields are automatically mapped during customer onboarding. However, the currency field is not mapped by default. If your organization uses multiple currencies, you must manually map the currency field for the relevant objects before initiating data sync.


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 Console** > **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 |
|--------------------|--|
| 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. |


| Field | Description |
|------------------------|--|
| Source Filter Criteria | <p>Enter a query condition based on the source system to define the criteria for filtering records for synchronization.</p> <ul style="list-style-type: none"> For forward sync from Salesforce to the Platform: Use Salesforce Object Query Language (SOQL) to define a query condition. <div data-bbox="833 613 1426 913" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>EmailTemplate Object ETL sync</p> <pre>"EmailTemplate.FolderId IN (SELECT Id FROM Folder WHERE AccessType = 'Public') AND (TemplateType = 'text' OR TemplateType = 'html')"</pre> </div> <ul style="list-style-type: none"> For reverse sync from the Platform to Salesforce: Use platform expression format (formula syntax) to define a query condition. <div data-bbox="833 1066 1426 1559" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Conditional status evaluation for Syncing Data to Salesforce</p> <pre>(ProductConfiguration.OldValue.BusinessObjectId == null AND ProductConfiguration.BusinessObjectId != null) OR (ProductConfiguration.OldValue.Status != \"Finalized\" AND ProductConfiguration.Status == \"Finalized\")</pre> </div> <p>In the above example, OldValue represents the previous value of a record. To compare the previous value, use <code>{ObjectName}.OldValue.FieldName</code>.</p> |
| Category | <p>Select the application to which the object belongs, such as CLM, CRM, CPQ, etc.</p> |

| Field | Description |
|----------------|---|
| 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 RLP • Reverse: Near Realtime from RLP to Salesforce • ETL: Extract, Transform, and Load through Data Sync. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Forward Sync: Forward sync, whether full or incremental, does not update null values for any column from Salesforce to the RLC. Additionally, it does not synchronize objects with complex designs that require custom logic for data transfer to the RLC.</p> <p>Reverse Sync: To include system audit fields (CreateDate, CreatedBy, UpdatedDate, and UpdatedBy) in the reverse data sync from Conga Platform to Salesforce, you need to:</p> <ul style="list-style-type: none"> • Map the Conga Platform fields to the corresponding Salesforce fields. For more information, see Creating and Managing Object Mappings. • Enable the permission to create audit fields for standard profiles in Salesforce. For more information, see Enable the permission 'Create Audit Fields' for standard profiles. </div> |
| Custom Query | <p>Enter the query, including fields and criteria-based filters, to retrieve specific records. It is useful for the Postgres system as a source.</p> |
| Source Type | <p>Select the type of source system a data sync establishes a connection with. It supports Salesforce and Postgres at the moment.</p> |


| Field | Description |
|----------------------------|--|
| Skip Delete Sync? | Enable this toggle to skip the synchronization of deleted records from the source object to the target object. By default, this feature is turned off. For an incremental sync, if a record gets deleted in the source object, the corresponding record must be removed from the target object. |
| 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 consider the object 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. |
| Is Translation Object | Enable this toggle to sync translation data of multiple languages used on the source platform. For more information, see Translation Sync . |
| 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. Next, you need to map the source objects' fields to the target objects' fields.
 - 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 |
|---------------------------|---|
| Source Field Name | Enter the keyword to search and select the source field name. |
| Source Field Type | This field's value is automatically filled based on the selected source field name, but you can edit it if needed. |
| 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 | This field's value is automatically filled based on the selected target field name, but you can edit it if needed. |
| Target Lookup Object Name | Enter the name of the lookup object if the target field is lookup. |
| Rule Name | Search and select 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. |
| 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. |

| Field | Description |
|-------------------------|--|
| 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 #f9c97d; padding: 10px; margin-top: 10px;"> <p> Do not enable this toggle for formula fields, as Reverse Sync does not support them. This is by design, as SFDC does not support inserting or updating formula fields.</p> </div> |
| Is Enabled? | Enable this toggle if you want the system to consider the field when syncing data. |


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

 You might encounter field data that are written differently or in a format that doesn't match what the Conga Platform can work with. In that case, you can convert source field data into a format that matches the requirements of the Conga Platform. For more information, see [Transforming Field Values](#).

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 Console** > **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**.

Similarly, you can edit field mapping.


 You can only modify synced object mappings.

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 Console** > **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**.

Similarly, you can delete field mapping.



 You can not delete if the object mapping is not synchronized and marked as **Is Protected**.

Transforming Field Values

When syncing and mapping source fields in the Conga Platform, you might encounter field data that are written differently or in a format that doesn't match what the Conga Platform can work with. To make sure everything syncs up properly, you need to change this source field data into a format that the Conga Platform can handle.

The Value Transformation feature is a helpful tool for converting source field data into the right format that matches the requirements of the Conga Platform.

To transform field value

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Data Sync**. The Mapped Objects for Data Sync page appears.
3. Click on the required Object from the list. The Field Mapping page appears.
4. Click the More () icon next to the field > click **Value Transformations**. The Value Transformation window appears.
5. Enter values in the following fields.

| Field | Description |
|--------------|---|
| Add | Click the Plus icon to add a new field value. |
| Name | Enter the value record name. |
| Source Value | Enter the source value name. |
| Target Value | Enter the target value name. |

| Field | Description |
|-------------|--|
| Is Enabled? | Enable this toggle if you want the system to consider the data when syncing. |
| Remove | Click the Cross icon to remove the record. |

6. Click **Save**.

Translation Sync


When syncing data from Salesforce (SF) to the Revenue Lifecycle Platform (RLP), you may come across a scenario where the source system utilizes multiple languages. In such cases, it is essential to have the translation information from the source system. This information is necessary to map with multilingual or non-English modules ensuring sync between both the source and target systems.

This section describes the steps to sync translation data from SF to RLP.

Prerequisite

The source system must have an object with a column that consolidates all language-related information.

To sync translation data

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

| Field | Description |
|-------------------------|--|
| Source Object Name | Enter the source object name. |
| Target Translation Name | Enter the name of the target translation 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. |

| Field | Description |
|------------------------|---|
| 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. |
| Category | Select 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 RLP to Salesforce • 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 | Select the type of source system a data sync establishes a connection with. It supports Salesforce and Postgres at the moment. |
| Skip Delete Sync? | Enable this toggle to skip the synchronization of deleted records from the source object to the target object. By default, this feature is turned off. For an incremental sync, if a record gets deleted in the source object, the corresponding record must be removed from the target object. |

| Field | Description |
|----------------------------|---|
| Is Enabled? | <p>Enable this toggle if you want the system to consider the object when syncing data.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i 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? | <p>Enable this toggle to sync the documents. This is only for the CLM application documents.</p> |
| 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> |
| Translation Module Name | <p>Search and select the translation module where you want to apply the translation.</p> |
| Language Column Name | <p>Enter the language field name from a specific SF object that stores language or locale values, such as 'en', 'eu', etc.</p> |
| Translation ID Column Name | <p>Enter the language ID field name from a specific SF object. This is necessary for linking translations, such as if it is for translating categories, the field name might be CategoryID within the same object.</p> |

6. Click **Save**.



Importing and Exporting Data Object Mappings

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



Best Practice


To import Data Object mappings, first export the current mapping from the UI. Open the exported JSON file and make the necessary updates to align with your requirements. Once the changes are made, import the updated file, ensuring it follows the same format as the original export for a successful import.

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 and go to Admin Console > Data Sync to open the Mapped Objects for Data Sync page.
The Mapped Objects for Data Sync page appears.
3. Click the More () icon.
4. Click **Export** to download an object mapping file (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 and go to Admin Console > 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 and click **Save**.


 During the import process, the application verifies if the object being imported already exists on the Conga Platform. If not, it creates a new one based on JSON parameters. If it exists, it updates its properties with JSON-defined parameters.

Running Data Sync on Demand

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

 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 Console** > **Data Sync**. The Mapped Objects for Data Sync page appears.
3. Click **Sync Now**. A confirmation window appears with information about welcome email notifications.

Confirm

User data sync will trigger email notifications to users. If you want to disable email notification, please disable it by navigating to Admin Console -> Organization -> Disable New User Email Notification and change value to 'Yes'

Are you sure you want to proceed with the sync?


4. Follow the instructions to turn off the welcome email, if needed.
5. Click **Yes** to run the data sync. A Sync Now window appears.


Sync Now

Sync Type

Full
▼

Sync Attribute Data Asset Based Sync

| Field | Description |
|---------------------|---|
| Sync Type | <p>Select the synchronization method that suits your needs:</p> <ul style="list-style-type: none"> • Full: Resyncs all records, including previously synced ones. • Incremental: Syncs only new records or those not on the Conga Platform yet. <div data-bbox="683 555 1428 801" style="border: 1px solid #ccc; padding: 5px;"> <p> Full or incremental sync does not update null values for any column from Salesforce to the RLC. Additionally, it does not synchronize objects with complex designs that require custom logic for data transfer to the RLC.</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> |
| Asset Based Sync | <p>Enable this toggle to sync only asset attributes. This is useful for syncing asset attributes from the Conga CPQ application to Conga RLC.</p> |

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

6. Click **OK**. The data sync process is begun and you are redirected to the Run History tab.
7. 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 | | | | | | | |
|---|-------------------------|-------------------------|-------------|-----------------------|--------------|-------------|---------------|
| <input type="text" value="Search this list"/> | | | | | | | |
| Pipeline Id | StartTime | EndTime | Sync Status | Action | Trigger Type | Run Type | Current Stage |
| 5bab338d-ed7b-4d6a-97f0-... | 11/30/2023, 3:01:26 AM | 11/30/2023, 3:02:02 AM | ● Failure | | Ondemand | Retry | None |
| 338ebb4a-6046-42b5-b233-... | 11/30/2023, 3:01:23 AM | 11/30/2023, 3:01:53 AM | ● Retry | | Ondemand | Retry | None |
| 372514ec-23fc-4441-bff8-2... | 11/30/2023, 3:00:56 AM | 11/30/2023, 3:03:48 AM | ● Failure | Retry | Ondemand | Full | Fetch |
| 8e729281-8ff9-4a99-8d7e-d... | 11/30/2023, 1:10:01 AM | 11/30/2023, 1:11:44 AM | ● Success | | Schedule | Incremental | None |
| 78dbe036-c7ce-4e91-ac92-... | 11/29/2023, 10:44:04 PM | 11/29/2023, 10:46:24 PM | ● Retry | | Ondemand | Full | Fetch |
| a18dea6b-76ba-4268-8611-... | 11/29/2023, 8:37:11 AM | 11/29/2023, 8:39:52 AM | ● Retry | | Ondemand | Full | Fetch |
| abd89a00-1735-4ae0-ac5a-... | 11/29/2023, 8:37:01 AM | 11/29/2023, 8:39:30 AM | ● Failure | Retry | Ondemand | Full | Fetch |
| 3a88ca8e-4587-4862-8a03-... | 11/29/2023, 8:32:10 AM | 11/29/2023, 8:34:52 AM | ● Failure | Retry | Ondemand | Incremental | Fetch |
| 45d15e69-5904-43bf-ac2c-... | 11/29/2023, 8:31:52 AM | 11/29/2023, 8:34:19 AM | ● Failure | Retry | Ondemand | Full | Fetch |
| abf63494-6e04-4df3-83d0-... | 11/29/2023, 6:51:55 AM | 11/29/2023, 6:54:31 AM | ● Failure | Retry | Ondemand | Incremental | Fetch |
| f53b1aa0-e874-4929-b4e1-... | 11/29/2023, 6:51:34 AM | 11/29/2023, 6:54:17 AM | ● Retry | | Ondemand | Full | Fetch |
| 330008d8-66e7-4940-b5e9-... | 11/29/2023, 6:39:37 AM | 11/29/2023, 6:42:12 AM | ● Failure | Retry | Ondemand | Incremental | Fetch |
| 48da80a3-6307-4198-b159-... | 11/29/2023, 6:32:02 AM | 11/29/2023, 6:34:41 AM | ● Failure | Retry | Ondemand | Full | Fetch |

The Run History list displays the following information.

| Column | Description |
|---------------------|--|
| Search | Allows to find a specific record by entering its pipeline ID in the search field. For more advanced search options, use additional filters and logic. For more information, see Filtering Records in the Grid View . |
| Pipeline ID | The ID of a sync operation. Click the link to view object-level details like the entity name, current processing stage, status, batch item count, successful items, failed items, and the total number of source records. 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. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i For reverse data sync, the status will remain "In Progress" until all parent and related child objects are fully synced to Salesforce.</p> </div> |
| Action | <p>If the sync fails for any reason, you can retry the sync after clearing the issues.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i After one retry attempt, if a batch with a sync status of Failure fails again, no further retries are allowed.</p> </div> |
| Trigger Type | <p>Indicates whether the sync was Scheduled, Manual, or Resync.</p> |
| Run Type | <p>Indicates the mode in which the data sync was initiated. The application supports the following modes:</p> <ul style="list-style-type: none"> • Incremental: Synchronizes only new or changed records. • Full: Synchronizes all records from the beginning. • Retry: Re-triggers synchronization for failed records at a later time. This will be enabled for failed status. • Attribute: Used for syncing master data, such as product attribute metadata. • ABO: Used for syncing asset attribute-based transactions. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The Attribute and ABO options are available only during full, incremental, or scheduled sync operations.</p> </div> |
| Current Stage | <p>The current status of the Data Sync.</p> |

Email Templates Data Sync


Customers often create different email templates in Salesforce for various purposes, such as sharing information with users and sending notifications. The default data sync mapping in the Conga Revenue Lifecycle Platform includes email template mapping.

This section explains how the Conga Revenue Lifecycle Platform manages these templates as part of its data sync process and describes steps to address any errors that may occur during the data sync process.

Prerequisite




You must have the Pipeline ID for a data sync batch that involves the Email Template object.

To identify and resolve email template error

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Data Sync**.
3. Click **Run History**. The list of all the data sync batches appears.
4. Search for a data sync batch associated with the Email Template object by entering its pipeline ID in the search field.

If the status displays Failed, there is an issue with the email template data sync process.

5. Click on the Pipeline ID link. The Run Information page appears.

| Run Information | | | | | | |
|---|--|---|-------------|---------------|---------------|-------------|
| Pipeline Id | StartTime | EndTime | Sync Status | | | |
| 268586ea-4f86-434b-8161-cbbc5d6613f5 | 12/13/2023, 12:39:00 AM | 12/13/2023, 12:44:00 AM | Failure | | | |
| Trigger Type | Run Type | Current Stage | | | | |
| Ondemand | Full | Upload | | | | |
| <input type="text" value="Search this list"/> | | | | | | |
| Entity Name | Processing Stage | Entity Status | Batch Count | Success Count | Failure Count | Total Count |
| EmailTemplate |  Upload |  Failed | 1 | 4 | 22 | 26 |
| EmailTemplateCategory | Upload |  Success | 1 | 61 | 0 | 61 |

6. Click on the EmailTemplate entity name. The list of failed email templates appears with their names and error messages.


| Failed Email Templates | | |
|---|---------------------------------|---|
| <input type="text" value="Search this list"/> | | |
| ID | Name | Error |
| 12c19576-1689-912c-597e-... | AutoDocGenTemplate | Content is not migrated as fieldName : apttus_proposal_primary_contact_c not found in fieldmappings, Objec... |
| 1f54ca15-e076-0b98-2e27-... | Intelligent Discovery Proces... | Content is not migrated as ObjectName : apttus_idejob_c not found in objectmappings Content is not migrate... |
| 2798a7c7-f0ab-2a85-6036-... | Agreement Office365 Exter... | Content is not migrated as fieldName : ownerfullname not found in fieldmappings, ObjectName : apttus_apt... |
| 2a1e01b1-0a9d-0b2b-0402-... | AutoDocGenTemplate | Content is not migrated as fieldName : apttus_proposal_primary_contact_c not found in fieldmappings, Objec... |
| 35b2c386-ad28-6ea7-9a71-... | Agreement Activation Notifi... | Content is not migrated as fieldName : link not found in fieldmappings, ObjectName : apttus_apt_agreement... |
| 3d7bcf7d-1ed9-3ed1-764e-... | Proposal Approval Template | Content is not migrated as fieldName : ownerfullname not found in fieldmappings, ObjectName : apttus_propo... |
| 48fff62e-2179-2c90-dde6-9... | Apttus Contract Activation ... | Content is not migrated as fieldName : ownerfullname not found in fieldmappings, ObjectName : apttus_apt... |
| 589cdf5-b8ee-65a0-3376-... | TEMP-2020-03-17T13:03:48... | Content is not migrated as fieldName : ownerfullname not found in fieldmappings, ObjectName : apttus_apt... |
| b21d684a-9788-eea2-67a6-... | Collaboration Task Updated | Content is not migrated as ObjectName : apttus_config2_collaborationrequest_c not found in objectmappings... |
| b5d2c795-21db-4022-7276-... | TEMP-2020-03-17T15:49:26... | Content is not migrated as fieldName : ownerfullname not found in fieldmappings, ObjectName : apttus_apt... |

Rows per page 1-10 of 21 < > of 3 pages



Now that you have the email template name and an error message with details explaining the reason for the failure, you can search for the corresponding email template in the Email Templates module. Once you locate it, review the actual template content and take the necessary corrective actions. For more information, see [Managing Email Templates](#).

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 Console** > **Data Sync**.
3. Click the More () icon on the Data Sync UI.
4. Click **Schedule**. The Schedules page appears.
5. Click **New**. The New Schedule page appears.

6. Enter values in the following fields.

Platform Administration / ...

New Schedule Cancel Save

*** Frequency**

Week
▼

*** Interval**

2

*** Start Date**

16/04/2024
📅

Time

03:33 PM
🕒

*** Trigger Operation**

start
▼

Sync Attribute Data

Asset Based Sync




i All selected objects, even if disabled, will be synced during the scheduled sync. If a disabled object sync is not required, deselect the objects and update the schedule.

🔍

2 rows selected

| | 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"/> | Contact | Contact | Contact | ✗ |

| 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 Date | Pick a date to trigger the sync operation. |
| Time | Pick a 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 #c8e6c9; padding: 10px; 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> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> All selected objects are synced during scheduled sync even if they are disabled. To prevent syncing disabled objects, update the schedule and deselect them.</p> </div> |
| Asset Based Sync | <p>Enable this toggle to sync only asset attributes. This is useful for syncing asset attributes from the Conga CPQ application to RLP.</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> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> When the Asset Based Sync toggle is enabled, this list is not visible because it is intended for syncing data related to specific objects.</p> </div> |


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.

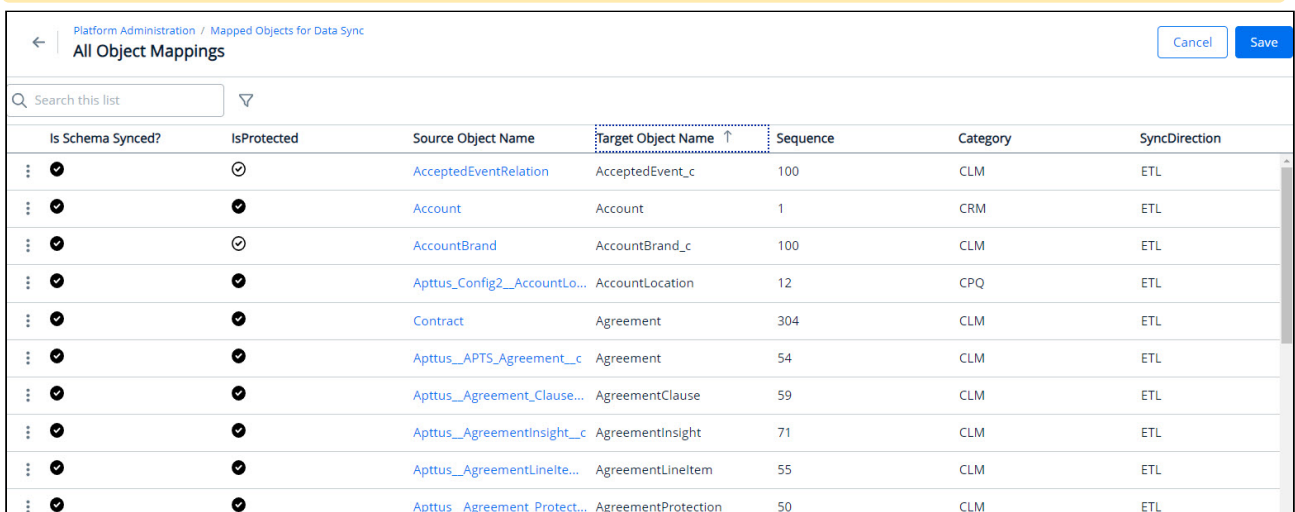
To change the data sync schedule

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.
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 Console** > **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 | |
| AccountContactRoleChang... | | 100 | |

| Source Object Name | Target Object Name | Sequence | Category |
|----------------------------|----------------------|----------|----------|
| AccountChangeEvent | | 100 | |
| AccountContactRole | <input type="text"/> | 100 | |
| AccountContactRoleChang... | | 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 Console** > **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 the *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 > **Admin Console** > **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 Console** > **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.

| Key | Value |
|-------------|-------|
| Order | 注文 |
| Opportunity | 機会 |
| Lead | 鉛 |

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 Console** > **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 the **Add Translation Entries** option. 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 Console** > **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 the 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 Console** > **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](#).

Managing Telemetry Logs

The **Telemetry Logs** module provides valuable insights into how users interact with software. Telemetry Logs is an automatic collection and transmission of data about the performance, usage, and errors associated with an API.

Three components - tracing, logging, and metrics - are essential for effectively monitoring and managing software applications and systems:

1. **Tracing:** This helps you identify the path of requests and transactions. It shows you the sequence of events and how different components of the system interact.
2. **Logging:** This gives you contextual details about events, errors, and activities, aiding in diagnosing issues and understanding the runtime behavior of the application.
3. **Metrics:** This allows you to measure the performance of the APIs.

Together, these telemetry components support proactive monitoring, troubleshooting, and optimization of applications and systems.

Benefits of telemetry logs

- **Performance Monitoring:** Provides insights into the performance of an API by tracking metrics such as response times, throughput, and resource utilization.
- **Usage Analysis:** By recording usage patterns and patterns of API calls, telemetry logs enable you to understand how consumers interact with the API.

- **Error Detection and Troubleshooting:** Telemetry logs capture error data, including error messages and stack traces. This information is helpful for quickly identifying and addressing issues within the API.

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

- [Fetching Telemetry Logs](#)
- [Exporting Logs](#)


Fetching Telemetry Logs

The **Fetch Data** feature helps you filter the API service-specific information. You can filter the results by time range and severity levels. With the advanced search option, you can search for records using specific details such as Trace ID, Deployment Environment, Service Name, Service Name Space, and error message.

The Telemetry Logs Listing page displays the following information.

| Column | Description |
|------------------------|--|
| Trace ID | A unique identifier assigned to a specific transaction or request. It is used to trace the flow of a request as it travels through different components or services. |
| Time Stamp | Indicates the time at which the log entry was generated. |
| Severity | Represents the level of importance or severity of the log entry. Severity levels include Error, Information, Trace, Debug, Warning, and Critical. |
| Deployment Environment | Specifies the environment in which the API is deployed, such as development, testing, staging, or production. |
| Service Name | Indicates the API service name. |
| Service Name Space | Specified the namespace to which the service belongs. |
| Message | Contains details about the event or transaction being logged. |


To fetch data

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Shared Apps** > **Telemetry**. The Telemetry Logs page appears.
3. Enter values in the following fields.
 - a. Start Time and End Time - Pick a start date-time and end date and time to specify the period for fetching data.
 - b. Severity - Select the level of severity to determine the data.
4. To filter records by keyword, place your cursor in the search bar and enter a keyword search term.
5. Click the **Advanced Search** icon to filter records using advanced search. For more details on advanced searching, see [Filtering Records in the Grid View](#).
6. Click **Fetch Data**.

Exporting Logs

Using the **Export Log** feature, you can easily download logs by searching for specific details like Trace ID, Severity, User ID, Service Name, Service Name Space, Deployment Environment, and Keywords.

To export log

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Shared Apps** > **Telemetry**. The Telemetry Logs page appears.
3. Click the **Export Log** button. The Track Export Log page appears.
4. Click the **Export Log Request** button.
5. Pick a start date-time and end date-time to specify the period for downloading data.
6. To add another filter criteria, click **Add Criteria**.
7. Apply the appropriate filter criteria from the **Select a Filter** dropdown.
8. Click **Save**. A Confirmation message appears including the Tracking ID.
9. You can find your filtered log request on the Track Export Log listing page. Click the **Download** link to export.


You can see all the exported log files in descending order on the Track Export Log list page.

Accessing Scheduled Jobs

The Scheduled Jobs page displays a list of planned and executed jobs. The user can view the job history of executed scheduled jobs to track their activity and view historical data.

| Scheduled Jobs | | | | | | |
|---|-------------|-----------|----------------|--|------------------------|----------|
| <input type="text" value="Search this list"/> | | | | | | |
| Job Name | Expression | Category | Execution Time | Status | Created Date | Job Type |
| structure-bundle-config | 0/30 ***?* | revenue | - | ● Enabled | 11/17/2023, 5:09:25 AM | Cron |
| elastic-config-backup | 0/30 ***?* | revenue | - | ● Enabled | 11/17/2023, 5:09:25 AM | Cron |
| cleanup-log-failed-records | * 0/4 ***?* | revenue | - | ● Enabled | 11/17/2023, 5:09:24 AM | Cron |
| revenue-config-publisher | 0/30 ***?* | revenue | - | ● Enabled | 11/6/2023, 5:35:06 AM | Cron |
| clm-lifecycle-autorenew | 0/30 ***?* | contracts | - | ● Enabled | 11/6/2023, 5:35:05 AM | Cron |
| clm-lifecycle-autoexpire | 0/30 ***?* | contracts | - | ● Enabled | 11/6/2023, 5:35:05 AM | Cron |
| clm-lifecycle-autoactivate | 0/30 ***?* | contracts | - | ● Enabled | 11/6/2023, 5:35:05 AM | Cron |
| clear-backup-configs | 0 0 ***?* | revenue | - | ● Enabled | 11/6/2023, 5:35:05 AM | Cron |
| cleanup-config-and-tasks | 0 0 ***?* | revenue | - | ● Enabled | 11/6/2023, 5:35:04 AM | Cron |

To view a scheduled job

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Shared Apps > Scheduled Jobs.

The Scheduled Jobs page appears, presenting the following information:

| Column | Description |
|----------------|---|
| Job Name | The scheduled job's name |
| Expression | The scheduled expression |
| Category | The namespace of the application to which the job belongs |
| Execution Time | The date and time when the job is executed |
| Status | The current status of the executed job |

| Column | Description |
|--------------|--|
| Created Date | The date and time when the job was initially created |
| Job Type | The type of job |

3. Click the **Job Name** link. The Job Information page appears with job information at the top and job history at the bottom.

The Job History panel displays the following information.

| Column | Description |
|----------------|--|
| ID | ID for the job |
| Error | Indicates any errors encountered during job execution. |
| Trace ID | Identifier for tracking and debugging purposes |
| Status | Displays the status of the job (e.g., completed, in progress, failed). |
| Execution Date | Date and time the job was executed |
| Execution Type | Specifies the type of execution (e.g., manual, scheduled). |


To delete a scheduled job

1. Click the **More** (⋮) icon at the start of the scheduled job record.
2. Click **Delete**.
3. In the confirmation dialog, click **Yes**.

Managing Workflows

Conga Workflows provides you the ability to automate standard business procedures and processes without the need for coding. It acts as an orchestrator, bringing together different tasks related to transactional data for objects, such as contracts or quotes. Workflows can help you automate manual tasks, synchronize data between systems, and improve productivity. For example, automating things like updating an object's status or sending

email alerts saves your team time that would otherwise be spent doing these tasks manually.

To open Workflows, click the App Launcher () icon from the top left corner, go to Admin Console, and click Workflows icon from the left panel

Key Features

- **Drag-and-Drop Design:** Choose from a selection of activities on a palette and easily place them on a canvas. Activities can be seamlessly connected using lines, representing the flow of data or control.
- **Execution of Orchestrations:** Once designed, orchestrations become executable within the system.
- **Real-time Feedback:** Users receive instant feedback during the design process.
- **Notification and Reminders:** Allows the triggering of notifications and reminders.
- **Configurable Start Times:** Gives flexibility to configure orchestrations to start based on schedules.

Examples:

- **NDA Contract Updates:** Update any related object records, such as "ContractRequest" object records, when you create or update an NDA contract, even if they are not directly related to the contract.
- **MSA Contract Updates:** Update the related "ContractLineItem" object records when you create an MSA contract. You can also execute a workflow via API on demand in this case.
- **General Contract Updates:** Update the related "ContractClause" object records when you create a contract.

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

- [Creating Workflows](#)
- [Working with Workflow Definitions](#)
- [Working with Workflow Instances](#)
- [Working with Stages](#)
- [Activities](#)

Creating Workflows

This section describes creating workflow definitions using activities. An activity represents a task within a workflow, and a workflow definition is a sequence of activities, such as sending an email or updating a specific record field. Workflow activities can be executed manually or automatically.

Activities can be broadly classified as blocking and non-blocking:

Non-blocking activities do not require user intervention or external input to complete. For example, the Send Email activity executes automatically using pre-configured information to send the email.

Blocking activities pause after performing an initial task and wait until all conditions are satisfied to resume the workflow. This resumption can occur either through a user action on the UI or by calling the resume API. For example, when Approval activity is initiated, it may start an approval process and then wait for the approval result to proceed. This could span days, during which the activity (and consequently, the entire workflow) remains suspended. Once the approval result is available, the activity can be resumed, and the workflow continues.


The RLP application includes the Default OOB Contract Workflow for the Conga CLM application. This out-of-the-box (OOTB) workflow definition consists of several stages. Whenever a contract is created, the Default OOB Contract Workflow is used to display the contract status in the form of a Chevron on the Contract Details page. To learn more about how it is used by the Conga CLM application and how customers can benefit from it, see [Creating a Contract > Visibility into contract lifecycle stage](#).

Prerequisites

You have defined:

- The conditions required for the workflow to start.
- What you want the system to do when these conditions are met.

To create a workflow

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > Admin Console > click Workflows icon from the left panel. The list of workflow appears.
3. Go to **Create New**. The New Workflow screen appears.
4. Enter the following information in the Details tab of the pop-up window.


| Field | Description |
|--------------|--|
| Name | Enter the technical name for the workflow. |
| Display Name | Enter user friendly display name for the workflow. |


| Field | Description |
|---------------|---|
| Object Name | Search and select the object to associate with the workflow. |
| Workflow Type | Select the workflow type that suits your requirement: <ul style="list-style-type: none"> • Stand Alone: A self-contained workflow type that operates independently from other workflows. • StagedFlow: A hybrid workflow type combining elements of both staged and standalone workflows. |
| Description | Enter relevant description for the workflow. |

5. Click **Create** and then **Start**. The Activities window shows activities for the selected workflow type. For standalone workflows, only activities specific to that type are shown, and the same applies to staged workflows. For example, you can use the Send Email activity to automatically send an email to a specific user or user group when an agreement is created.
6. Click the label to view category-specific activities and use the search box to find activities by keyword.
7. Click on the activity you want to use into your workflow. The table below gives an overview of each activity the system supports. For more details, see the [Activities](#).

| Activity | Type | Description |
|------------|--------------|---|
| Send Email | Non-blocking | Sends an email to specified recipients. |
| Approval | Blocking | Invokes an approval request when specific entry criteria are fulfilled. The workflow pauses until the approval engine responds to the request. Once the approval engine responds, the workflow automatically resumes execution. |
| Assignment | Non-blocking | Updates the record (variable or collection variable) stored within the workflow context in order to minimize frequent updates to the database. |

| Activity | Type | Description |
|-----------------|--------------|--|
| Resume Workflow | Blocking | Temporarily pauses the workflow until a specific action is completed. It will remain paused until there is a change in data, after which the workflow will resume. |
| Start Workflow | Non-blocking | Allows configuring a trigger at the beginning of your workflow to initiate execution in response to specific data changes. |
| End Stage | Non-blocking | Marks the previous stage as completed in the workflow execution. |
| ESignature | Blocking | Allows integrating electronic signature (eSign) capabilities into your workflows. User inputs provided in the product's GUI—such as document, sign provider details, subject, and body—serve as the triggering inputs. After these inputs are submitted, the workflow automatically invokes the appropriate eSign API to complete the process. |

| Activity | Type | Description |
|---------------------|---|---|
| Document Generation | Blocking (Manual) Non-blocking (Automated) | <p>Allows generating documents either manually or automatically based on specified criteria.</p> <ul style="list-style-type: none"> • Manual: The activity remains suspended and resumes the workflow once you create a document. • Automated: The document is automatically generated based on the parameters set in the activity. <p>For automated document generation, you can choose to add a watermark, select the document output format, and set the protection level. The system will automatically select the most relevant template based on the record.</p> <p>For example, you can use this activity to generate customized contract documents dynamically, based on specific conditions and requirements.</p> <div data-bbox="868 1290 1426 1453" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> This activity applies specifically to workflows involving Contract objects.</p> </div> |
| Execute Custom API | Non-blocking | Executes custom code by invoking a custom API. |

| Activity | Type | Description |
|----------------|--------------|---|
| Create Records | Non-blocking | <p>Creates a record at runtime for a specific object. You need to select all the required fields to create a record and provide the appropriate values within the activity. When the activity is triggered, a record with the specified field values will be created for the object.</p> <div data-bbox="868 633 1426 799" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> The system supports lookup, currency, and multiple picklist as complex data types for fields.</p> </div> |
| Update Records | Non-blocking | <p>Updates the record with the specified fields and values for selected Object Name and Record ID associated with the running workflow. This activity has two outcomes: Done and Fault.</p> <ul style="list-style-type: none"> • Done: Indicates the update was successful. • Fault: Indicates the update failed. <p>The Fault outcome allows you to decide what actions to take if the update fails. It is triggered only if the database update operation fails. Under the Fault outcome, you can add activities such as sending an email or connect it to another activity, like iterating through a loop outcome.</p> |
| Get Records | Non-blocking | <p>Allows querying a record of any object from the database, store it in a variable, and subsequently utilize it in later workflow activities for further processing. For example, using a For Loop.</p> |

| Activity | Type | Description |
|------------------------|---------------------------|---|
| If Else | Non-blocking | Evaluates the query condition and follows the corresponding branch in the workflow based on whether the condition is True or False. |
| Internal Webhook | Non-blocking | Invokes internal APIs. |
| Loop | Non-blocking | Uses a for-loop to paginate through records retrieved by the Get Records activity and process them iteratively. |
| Schedule Workflow | Non-blocking | Starts the workflow at regular intervals based on the specified frequency: daily, weekly, or hourly, with a defined start date and time. |
| Send Email by Template | Non-blocking | Sends an email to selected recipients using a pre-defined email template. |
| Chain Stage | Blocking and Non-blocking | Runs another workflow as a sub-workflow. |
| Fork | Non-blocking | Creates multiple independent sub-workflows that run sequentially in a specified order within a single workflow. |
| OR | Non-blocking | Combines multiple workflow executions into a single transition. This allows the next step in a workflow to execute as soon as any activity from the multiple paths is completed. Without the OR activity, if multiple workflow paths converge simultaneously, subsequent activities may be executed more than once. |
| Decision | Non-blocking | Allows creating different workflow paths and selecting the path based on conditions evaluated at runtime. |

| Activity | Type | Description |
|-------------|--------------|--|
| Go to Stage | Non-blocking | Allows jumping to or restarting any stage based on specified conditions. It can be used within a staged workflow, where multiple stages are configured to run in sequence. |

Define variables using a key-value pair format and access them in workflows by referring to their names.

8. Click **Configure Activity**. An activity-specific window to configure workflow parameters appears.
9. Enter the necessary information and click **Save**.
10. You can edit or delete the activity directly from the workflow design pane. Go to the activity tile and click the ellipsis (***) icon:
 - Click **Edit** to update the activity parameters.
 - Click **Delete** to remove the activity.
11. Click the Plus (+) icon to add another activity to the flow.
12. Go to the **Settings** tab to manage workflow details, variable or formulas. The variables and formulas you create here can be used within the applicable activities. This tab contains three sections:
 - **Details**: Allows updating the Display Name and Description Information.
 - **Variables**: Allows adding a new variable or update an existing one. To learn more about adding variables, see [Defining Variables](#).
 - **Formulas**: Allows adding a new formula expression or updating an existing one. To learn more about adding formulas, see [Defining formulas within a workflow](#).
13. Click **Publish**. A confirmation message appears.
14. Click **Yes, Publish**. A success message appears.


Your workflow is now accessible from the workflows list. After the workflow is executed, you can view the workflow instances on the Instances tab. For more information, see [Working with Workflow Instances](#).

Defining formulas within a workflow

The Formula feature enables you to create expressions that calculates the value of a field within a workflow. These formulas can be applied across various activities wherever needed. This section describes creating formulas within a workflow definition.


To create a formula

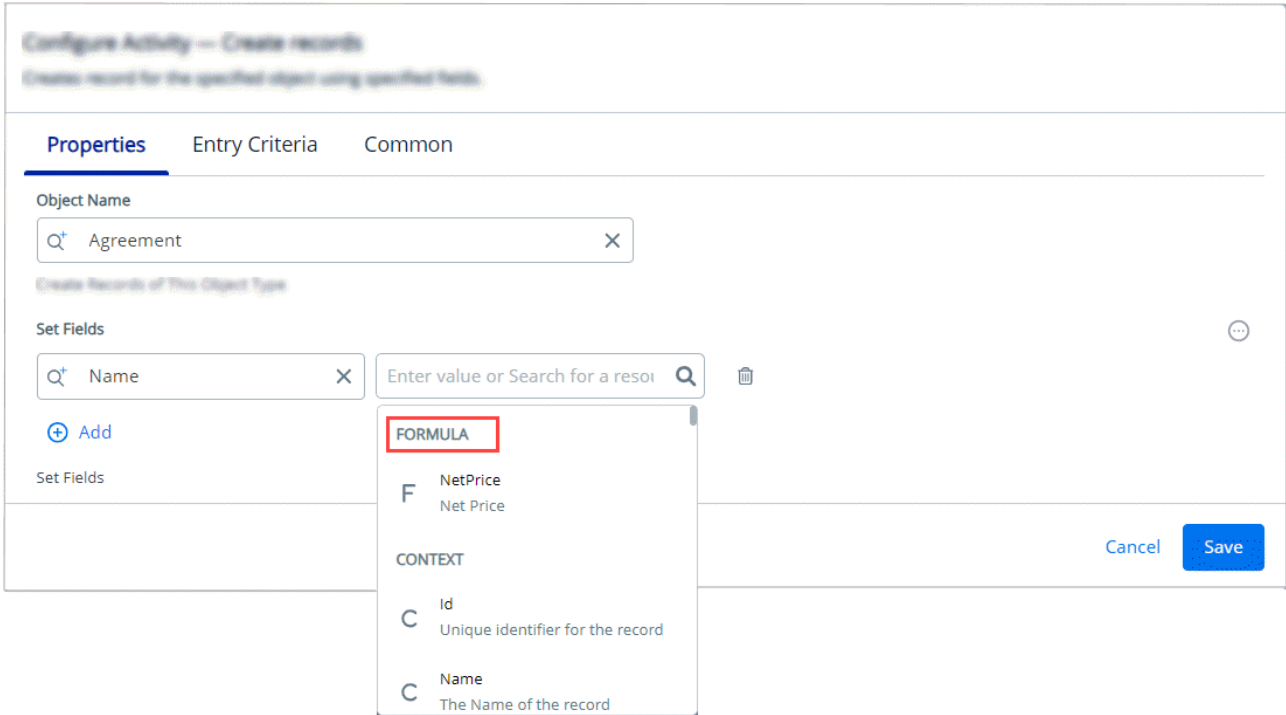
1. Open the workflow definition for which you want to create a formula.
2. Click Settings tab and select Formulas menu from the left panel.
3. Click **New Formula** to open the formula builder. Here, you can create expressions to calculate field values. All fields from the context object are available to use.
4. Enter the Name and Description for the formula.
5. Select the Data Type from the dropdown to define the output data type of the calculated expression at runtime. Supported data types include String, Integer, and Decimal.
6. Formulas can include context record fields, functions, or variables. Search for Context Record field, click the arrow next to a field name to view and select related child fields. The chosen field or subfield will then appear in the right panel.

 For context record fields, the application currently supports only Id and Name child fields for Lookups. Related Lookup child fields are not supported.

7. Click **Insert** to add the selected field to the formula.
8. To include a function in your expression, click the Functions tab, select a function, and click **Insert**.
9. To add operators, use the toolbar below the expression window as needed.
10. Continue building your formula. To remove the entire expression, click **Clear**, or press the Backspace key to manually remove specific parts.
11. Click **Validate** to check the formula. The system will confirm if it is valid or display an error message if it is not.
12. Click **Submit** button to add the formula.

The formula is listed under the Formulas section and can be used in relevant activities where field properties can be set. You can edit, clone, or delete the formula from the Formulas listing page.

 Before deleting a formula, verify if it is being used in any activity. Removing a formula that is part of one or more activities can impact the workflow execution.



Defining Variables

You can define variables at the workflow level to be consumed in workflow activities. These variables store values like text, numbers, decimals, or JSON. This makes it easy to pass information between steps, helping to manage and automate tasks.

Example: In a contract management workflow, you can create a variable called "ClientName" to store the name of the client. This variable can be used in various activities of the workflow.

To add variable

1. Open existing workflow definition from the listing page.
2. Click Settings tab and select Variables menu from the left panel.
3. Click **New Variable**. The Add Variable window appears.
4. Enter or select values for the following fields:

| Field | Description |
|-------|--------------------------------|
| Name | Enter a name for the variable. |

| Field | Description |
|-------------|--|
| Data Type | Select the type of data the variable will hold, such as text, integer, decimal, or JSON. |
| Value | Enter or select the specific value for the variable. |
| Description | Enter a relevant description for the variable. |

5. Click **Submit**.

The variable is listed under the Variables section and can be used in relevant activities where field properties can be set. You can edit, clone, or delete the variable from the Variables listing page.

i Before deleting a variable, verify if it is being used in any activity. Removing a variable that is part of one or more activities can impact the workflow execution.

Configure Activity -- Create records
 Create record for the specified object using specified fields.

Properties Entry Criteria Common

Object Name

Create Records of This Object Type

Set Fields

×

🔍

🗑️

+ Add

Set Fields

VARIABLES

- V ClientName
Name of the client

CONTEXT FIELDS


- C Id
Unique identifier for the record

Working with Workflow Definitions

The Workflow Definitions section displays all the workflows created within a system, whether in draft or published status. You can search for workflows by name and perform actions like edit, publish, un-publish, and delete.


 You can not modify or delete out-of-the-box (OOTB) workflow definition.

To edit workflow definition

1. Go to the Workflows listing.
2. Search for a workflow definition by entering its name.
3. Click the definition name link in the list, or click the More () icon at the beginning of the record, and then click **Edit**.
 - Setup pane: Modify workflow activities.
 - Settings pane: Edit workflow details and manage variables. To learn more about adding variables, see [Creating Workflows](#).
 - Instances pane: Manage workflow instances. To learn more about workflow instances, see [Working with Workflow Instances](#).
4. Click **Publish**. A confirmation message appears. Click **Yes, Publish**. A success message appears.

An updated workflow version is created.

To publish workflow definition


1. Go to the Workflows listing.
2. Search for a workflow definition by entering its name.
3. You can publish a workflow draft in two ways:
 - a. Go to Actions column and click the **Publish** button.
 - b. Click the definition name link in the list, or click the More () icon at the beginning of the record, and then click **Edit**. The Setup pane appears. Click **Publish**.
4. A confirmation message appears. Click **Yes, Publish**. A success message appears.

If the trigger meets the defined criteria, the workflow will be executed for that context.

 You can publish a draft version of the workflow definition.


Publishing a workflow activates it. Similarly, you can deactivate a workflow by unpublishing it, returning it to draft status.

To export the workflow definition

1. Click the workflow definition name link in the list. The Setup pane appears.
2. Click the More () icon, and then select **Export**.

A workflow definition is exported in JSON format.

To import the workflow definition

1. Click the workflow definition name link in the list. The Setup pane appears.
2. Click the More () icon, and then select **Import**.
3. Browse for the workflow definition file in JSON format and click **Open**.
A confirmation message appears and the newly imported workflow activities will be visible on the pane.
4. Click **Publish**. A confirmation message appears. Click **Yes, Publish**. A success message appears.


To delete the workflow definition

1. Click the More () icon at the beginning of the record, and then click **Delete**.
2. A confirmation message appears. Click **Yes, Delete**.

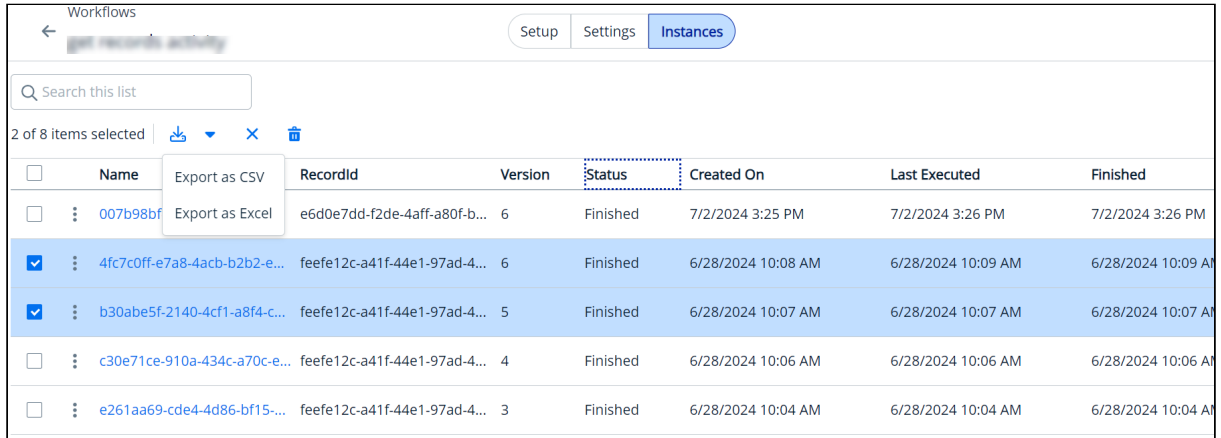
Working with Workflow Instances

Workflow Instances are the actual execution of workflow definitions. A single workflow definition can have multiple workflow instances in progress at any given time. You can view and terminate any active workflow instances.



To view and manage workflow instances

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > Admin Console > Workflow. The Workflows listing page appears.
3. Enter the name of the workflow definition you want to search for to see its instances.

- Click the More () icon at the beginning of the workflow record, and then click **View Instances**. The Instances pane shows a list of active workflow instances.




| <input type="checkbox"/> | Name | RecordId | Version | Status | Created On | Last Executed | Finished |
|-------------------------------------|------------------------------|------------------------------|---------|----------|--------------------|--------------------|--------------------|
| <input type="checkbox"/> | 007b98bf... | e6d0e7dd-f2de-4aff-a80f-b... | 6 | Finished | 7/2/2024 3:25 PM | 7/2/2024 3:26 PM | 7/2/2024 3:26 PM |
| <input checked="" type="checkbox"/> | 4fc7c0ff-e7a8-4acb-b2b2-e... | feefe12c-a41f-44e1-97ad-4... | 6 | Finished | 6/28/2024 10:08 AM | 6/28/2024 10:09 AM | 6/28/2024 10:09 AM |
| <input checked="" type="checkbox"/> | b30abe5f-2140-4cf1-a8f4-c... | feefe12c-a41f-44e1-97ad-4... | 5 | Finished | 6/28/2024 10:07 AM | 6/28/2024 10:07 AM | 6/28/2024 10:07 AM |
| <input type="checkbox"/> | c30e71ce-910a-434c-a70c-e... | feefe12c-a41f-44e1-97ad-4... | 4 | Finished | 6/28/2024 10:06 AM | 6/28/2024 10:06 AM | 6/28/2024 10:06 AM |
| <input type="checkbox"/> | e261aa69-cde4-4d86-bf15-... | feefe12c-a41f-44e1-97ad-4... | 3 | Finished | 6/28/2024 10:04 AM | 6/28/2024 10:04 AM | 6/28/2024 10:04 AM |

- To open the associated workflow definition pane, click on the Name link.
- To cancel or delete an instance, click the More () icon at the beginning of the record and select either Cancel or Delete.
- To download multiple instances, first select the records, then click the Download () icon, and select the format you want to download the records in.

Working with Stages

A workflow may consist of multiple stages. To view or edit these stages, you need to edit the workflow definition and make changes. The Stages section lists all stages within the workflow definitions allowing you to view, edit, delete, unpublish, or publish the staged flow.

 You cannot edit or delete out-of-the-box (OOTB) staged flows.

You can view, edit, or delete a stage in the same way as a workflow definition. For more information, see [Working with Workflow Definitions](#).

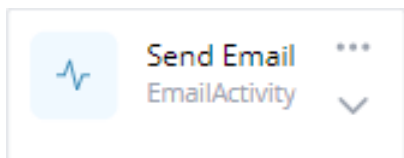
| Workflows | | Search this list | | | | |
|-----------|--------|--------------------------|-----------|---|---------|-----------|
| Stages | | Name | Object | Description | Version | Actions |
| | | Amended OOB Stage8 | Agreement | Contract is Amended. | 20 | Unpublish |
| | | Cancelled OOB Stage9 | Agreement | Contract is cancelled | 20 | Unpublish |
| | Edit | Expired OOB Stage6 | Agreement | Contract is Expired. | 20 | Unpublish |
| | Delete | Import OOB Stage11 | Agreement | | 14 | Unpublish |
| | | In Approvals OOB Stage3 | Agreement | Documents sent for Approvals. | 20 | Unpublish |
| | | In Draft OOB Stage1 | Agreement | Users initiate agreements and find apposite documents. | 20 | Unpublish |
| | | In Effect OOB Stage5 | Agreement | Contract will be Activated. | 20 | Unpublish |
| | | In Review OOB Stage2 | Agreement | To manage the agreement negotiation process. | 20 | Unpublish |
| | | In Signatures OOB Stage4 | Agreement | This stage covers the process for sending agreements for executing, gath... | 20 | Unpublish |
| | | Renewed OOB Stage10 | Agreement | Contract is Renewed | 14 | Unpublish |

Activities

A workflow activity contains instructions for the workflow to process.

Activities can involve manipulating records, waiting for a specific time, or logging events. Workflow conditions determine if an activity will be performed. You can add, remove, or rearrange activities, and transitions can be created between them.

Sample activity: This activity sends an email to designated recipients.



Workflows execute activities under the context of the currently logged-in user or the system user, depending on the trigger type. There are two trigger types available:

1. **Record Trigger:** If a workflow is started from a record operation, activities run under the user session that performed the operation.
2. **Schedule Trigger:** For workflows initiated by schedules or timers, activities run under the system user.

Core activities provided within the system:

- Approval
- ESignature
- Document Generation
- Assignment
- Decision
- If Else
- Loop

- Fork
- OR
- Create Records
- Get Records
- Update Records
- Resume Workflow
- Start Workflow
- Schedule Workflow
- Send Email
- Send Email by Template
- Execute Custom API
- Internal Webhook
- Chain Stage
- End Stage
- Go to Stage

Approval

Sends a record for approval when specific criteria are met. The workflow enters a suspended state until the approval engine responds. Once a response is received, the workflow automatically resumes. Depending on the approval engine's response, the workflow will either follow the Approved or Rejected path.

On the product side, the workflow runtime API provides the status of the approval activity, including actions like Complete, SubmitApproval, or Override. The product uses this information to display a "Submit for Approval" button, allowing users to submit the object for approval.

Submit Runtime API details

Once the specific entry criteria are met and the workflow is in a suspended state, the system uses the APIs below to submit the approval request for the context record.

API endpoints

Standalone Workflow: `POST /api/workflow/v1/runtime/workflow-instances/{workflowInstanceId}/activities/{activityId}/submit-approval`

Staged Workflow: `POST /api/workflow/v1/runtime/stage-instances/{stageInstanceId}/activities/{activityId}/submit-approval`

Sample request payload

Standalone Workflow:

```
{
  "workflowInstanceId": "74c83333-f7d9-4e96-aa27-3c4c3581a2e4",
  "ActivityId": "5010c7bc-bf0f-4605-9c56-2299a683440a",
  "Comments": "User Notes"
}
```

Staged Workflow:

```
{
  "StageInstanceId": "74c83333-f7d9-4e96-aa27-3c4c3581a2e4",
  "ActivityId": "5010c7bc-bf0f-4605-9c56-2299a683440a",
  "Comments": "User Notes"
}
```

Example:

In a contract approval process, the Approval Activity pauses the workflow for review when a contract meets certain criteria, like a high value. The manager or legal team reviews and submits it for approval. If approved, the contract moves to finalization. If rejected, it goes back for revisions.

Properties and activity information

Properties determines the initial behavior of the activity.

| Field | Description |
|-------------------|---|
| Properties | |
| Entry Criteria | <p>Set the conditions that must be met to trigger the workflow.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |

| | |
|---------------------|---|
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| Criteria Expression | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>For example, (Agreement.TotalContractValue > ("1200") and (Agreement.RecordType= ("MSA") or Agreement.RecordType= ("NDA"))))</p> |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

ESignature

Allows integrating electronic signature (eSign) capabilities into your workflows. User inputs provided in the product's GUI—such as document, sign provider details, subject, and body—serve as the triggering inputs. After these inputs are submitted, the workflow automatically invokes the appropriate eSign API to complete the process.

- Group: Business Interactions
- Nature: Blocking

ESignature Runtime API details

On the product side, the **ESignature** runtime API provides the status of the workflow activity, including actions like "Send for Signature" or "Override." The product uses this information to display a "Send for Signature" button, which allows users to submit the document for electronic signature. Once the specific entry criteria are met and the workflow is in a suspended state, the system uses below APIs to submit the eSignature request for the context record.

API endpoints

Standalone Workflow: POST /api/workflow/v1/runtime/workflow-instances/{workflowInstanceId}/activities/{activityId}/esign

Staged Workflow: POST /api/workflow/v1/runtime/stage-instances/{stageInstanceId}/activities/{activityId}/esign

Sample request payload

Standalone Workflow:

```
{
  "workflowInstanceId": "74c83333-f7d9-4e96-aa27-3c4c3581a2e4",
  "ActivityId": "5010c7bc-bf0f-4605-9c56-2299a683440a",
  "ESignModel": "Model Data"
}
```

Staged Workflow:

```
{
  "StageInstanceId": "74c83333-f7d9-4e96-aa27-3c4c3581a2e4",
  "ActivityId": "5010c7bc-bf0f-4605-9c56-2299a683440a",
  "ESignModel": "Model Data"
}
```

Example:

In a contract approval process, after a contract is reviewed and finalized, the workflow needs to send the contract to the relevant parties for an electronic signature using an eSign provider like DocuSign. The eSignature activity will automate this process. Once these conditions are met, the workflow triggers the eSignature activity, and the contract is sent for signing.

Properties and activity information


Properties determines the initial behavior of the activity.

| Field | Description |
|------------|-------------|
| Properties | |

| | |
|----------------------------|---|
| <p>Entry Criteria</p> | <p>Specify fields and their values:</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>For example, (Agreement.TotalContractValue> ("1200") and (Agreement.RecordType= ("MSA") or Agreement.RecordType= ("NDA"))))</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |
| <p>Description</p> | <p>Provide a description that is relevant to the activity.</p> |

Document Generation

Allows generating documents either manually or automatically based on specified criteria. You can use this activity to generate customized documents dynamically, based on specific conditions and requirements.


 This activity applies specifically to workflows involving Contract objects.

Example:

In a CLM system, the legal team can use the Document Generation activity to automatically create documents based on specific conditions. For instance, when the contract type is "Sales Agreement" and the client status is "Verified," a PDF contract is generated with a "Draft" watermark.

Properties and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.


| Field | Description |
|------------------------|---|
| Properties | |
| Select Generation Type | <p>Select how to generate the document. Based on your selection, the system displays the remaining input elements on the screen.</p> <ul style="list-style-type: none"> • Manual: The activity pauses until you manually create the document. This blocks the workflow. • Automated: The document is automatically generated based on the parameters set in the activity. This does not block the workflow. You can also add a watermark, choose the document format, and set the protection level. <div data-bbox="689 1585 1426 1832" style="border: 1px solid #ccc; border-radius: 5px; padding: 10px; margin-top: 10px;"> <p> In automated document generation, the activity automatically selects a document template based on template filter rules that best match the record. It does not currently support selecting a specific Template ID.</p> </div> |
| Include Watermark | Select this option to add a watermark to the generated document. |

| | |
|-------------------------|---|
| Watermark Text | Enter the text you want to display as a watermark. You can also include variables, formulas, or context fields to dynamically generate the watermark text. |
| Select Output Format | Select the output format for the document: DOCX, PDF, or PDF/A. The system automatically selects the most suitable template based on your configuration. |
| Select Protection Level | Set the level of user permissions for the document. This option is available only for the DOCX output format. |
| Entry Criteria | |
| Entry Criteria | Set the conditions that must be met to trigger the workflow. <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Filter Expression | By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT. For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true. |
| Criteria Expression | Displays the criteria expression based on the selected field, operator, and value condition. |
| Common | |

| | |
|--------------|---|
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Assignment

Assigns value to the variable or collection variable stored within the workflow context in order to minimize frequent updates to the database. The variables that are created by the user or the collection variables fetched via the Get Records activity are considered for this assignment.

 Values assigned through this activity will not be updated in the database. To update values, use the Update Records activity with the option "Use the IDs and all field values from a record or record collection".

Prerequisite: A variable or collection variable must exist.

Use Cases:

1. **Assign Value to a collection variable:** You need to set the Approval Required field to "true" for all contracts with a total value greater than USD 10,000. To achieve this, first use the Get Records activity to retrieve the relevant contracts. Next, implement a Loop activity to go through each retrieved contract. Inside the loop, use the Assignment activity to set the Approval Required field to true without updating the database for each record. After the loop, add an Update activity in the Done outcome, selecting the option to "Use the IDs and all field values from a record or record collection" to perform a batch update.
2. **Assign value to a variable when workflow is executing:** Assign a value to the variable `Approval_Required_Variable` based on the record type during workflow execution. First, define the variable in the workflow. Then, add an If activity with the condition: if the record type of the current record is "MSA," you require approval; otherwise, you do not. The If activity will yield either a true or false outcome. If the record type is "MSA," the assignment activity sets the variable value to true. If it is not "MSA," the variable remains false. After the assignment activity, all subsequent activities will reference the updated value of the variable.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description | |
|----------------------|--|---|
| Properties | | |
| Select Variable Type | You can assign a value to either a workflow variable or to the current item of collection variable inside a loop activity depending on the activity's placement. | |
| | Workflow Variable: Updates a workflow variable, preserving its value throughout execution. If the workflow is suspended, this value is saved in the database and retrieved upon resuming. | |
| | Workflow Variable Key Value | Enter the key name of the workflow variable you want to update, along with its value. This value will remain constant throughout the execution of the workflow. You can enter the value directly, use another variable, apply a formula, or select a static value from the resource dropdown (value field). |
| | Current Item from Loop: Assigns a value to the current item within a loop. This option should only be selected if the activity is inside a loop. | |
| | Loop Collection Variable Name | Enter the name of the collection variable being used in the loop activity. This variable holds the set of items being iterated over. |
| | Loop Current Item Variable Name | Enter the name of the variable that represents the current item within the loop. This variable will hold the value of the item being processed at each iteration. |
| | Loop Variable Key Value | Enter the field name of the object that the loop iterates over. In the corresponding value textbox, assign the value you want for that field. You can use a variable or select a formula for the value. |
| Common | | |

| | |
|--------------|---|
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Decision

The Decision activity allows you to create different workflow paths and select one based on condition(s) evaluated at runtime. You can define various outcomes and specify conditions that will be evaluated during runtime to determine which path to follow. Conditions are checked in the order they were added, using a First-In-First-Out (FIFO) approach. Once a condition is met, the workflow proceeds along the corresponding path, and the rest of the conditions are ignored. As a best practice, a Default outcome is included during design as a fallback if none of the conditions are met at runtime.

- Group: Logic
- Nature: Non-Blocking


Example: Contract Approval Workflow

In a contract approval workflow, the decision activity can route contracts based on their value. If the contract value is less than \$10,000, it goes to the team manager for approval; between \$10,000 and \$50,000, it routes to the department head; and if it exceeds \$50,000, it goes to the CFO. As a fallback, if none of the conditions are met, the contract is sent to the legal team for further evaluation.

Properties and activity information

Properties determines the initial behavior of the activity.

| Field | Description |
|------------|-------------|
| Properties | |

| | |
|-----------------|---|
| <p>Outcomes</p> | <p>Allows adding multiple outcomes and its conditions. Click Add Condition to add outcome.</p> <ul style="list-style-type: none"> • Name: By default, the application assigns the outcome name as "Case" followed by a number that increases with each new condition. You can rename the outcome as needed. • Condition: The defined condition is displayed here. To add a condition, click the  icon. The criteria builder appears. Click Add Criteria and set the conditions that must be met for this outcome. <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more criteria, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Criteria</p> | <p>Set the conditions that must be met to trigger the workflow.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |

| | |
|-------------------|--|
| Filter Expression | By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT. For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

If Else

Evaluates the query condition and follows the corresponding branch in the workflow based on the condition's outcome. This activity has two outcomes: True or False.

- Group: Logic
- Nature: Non-Blocking

Example: Quote Approval in CPQ System

In a CPQ system, when a sales representative submits a quote with pricing and discounts, the **If Else activity** is used to evaluate whether the discount is within the allowed limit.

- True Outcome: If the discount is within the acceptable limit, the quote is approved, and the sales representative receives an approval notification.
- False Outcome: If the discount exceeds the allowed limit, the quote is rejected, and the sales representative is notified that an adjustment is needed.

Properties and activity information

Properties represent the values used to perform the operations of an activity.

| Field | Description |
|-------------------|-------------|
| Properties | |

| | |
|----------------------------|---|
| <p>Query Condition</p> | <p>Set the query conditions that determine the activity's outcome. If the condition is met, the workflow will follow the True path; otherwise, it will follow the False path.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>For example, (Agreement.TotalContractValue > ("1200") and (Agreement.RecordType= ("MSA") or Agreement.RecordType= ("NDA"))))</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |
| <p>Description</p> | <p>Provide a description that is relevant to the activity.</p> |

Loop

Uses a for-loop to iterate through each record of the collection variable. When the workflow execution reaches this activity, it will loop through each record of collection and will execute the activity defined in iteration. Once loop is completed, next set of activities will be executed.

- Group: Logic
- Nature: Non-Blocking

This activity has two outcomes.

- Done: Once the loop is completed, the control will go to "Done" outcome.
- Iterate: Using Iterate, user can loop through the collection.

Example:

You can use the **Loop** activity in a workflow to send follow-up emails to a list of contacts. First, use the **Get Records** element to retrieve the contacts who attended an event. Then, the **Loop** activity will iterate through each contact in the collection variable, and for each one, an email will be sent. Once all emails are sent, the flow will exit the loop and proceed to the next step.

Properties and activity information

Properties determine the initial behavior of the activity.

| Field | Description |
|----------------------------|---|
| Properties | |
| Collection Variable Name | Enter the variable name where the collection data is stored, such as the data retrieved using the Get Records activity. |
| Current item Variable Name | Enter the variable name that stores the current record being processed in the loop. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |

| | |
|-------------|---|
| Description | Provide a description that is relevant to the activity. |
|-------------|---|

Fork

Creates multiple independent sub-workflows that run sequentially in a specified order within a single workflow. This activity is used to create multiple outbound transitions and to run several activities independently within the same workflow. Each branch is executed one after another in an order. You can draw any number of transitions from this activity.

- Group: Logic
- Nature: Non-Blocking

Example: Manage sequential departmental reviews

After the contract is drafted, using the Fork activity create multiple independent branches for review. You assign each branch to different departments—Legal, Compliance, Finance, and Risk Management. Each department reviews the contract in a set order, one after another.

Legal reviews the contract first. Once approved, it moves to Compliance, followed by Finance, and then Risk Management. After all departments approve, the contract proceeds to final executive approval and then execution.

Properties and activity information

Properties determines the initial behavior of the activity.

| Field | Description |
|-------------------|--|
| Properties | |
| Branches | Add one or more branch names by typing the name in the text box and clicking outside the field. The system displays the entered branch name as a tag. Repeat these steps to add multiple branches. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

OR

Unites multiple activity execution paths into a single transition. This allows the next step in a workflow to execute as soon as any activity from the multiple paths is completed. Without the OR activity, if multiple workflow paths converge simultaneously, subsequent activities may be executed more than once.

- Group: Logic
- Nature: Non-Blocking

Example: Approval Workflow with OR Activity

You design a contract approval workflow with two parallel activities: Legal Review and Finance Review. The OR activity allows the workflow to move to the next step, Final Approval, as soon as either the Legal Review or Finance Review is complete. This approach speeds up the process by removing the need for both reviews to finish before proceeding.


Adding branches to the OR Activity

To link a path to the OR activity, hold the **Shift** key and click the **plus icon** at the end of the branch you want to connect to the OR activity. The icon becomes bold. Then, click the OR activity tile and confirm the connection in the pop-up. To unlink a path from the OR activity, right-click the path you want to remove. Confirm the removal in the pop-up that appears.

Create Records

Creates a record at runtime for a specific object using specified fields. You need to select all the required fields to create a record and provide the appropriate values within the activity. When the activity is triggered, a record with the specified field values will be created for the object.

- Group: Data
- Nature: Non-Blocking

 The workflow administrator is responsible for ensuring all required fields are filled in before creating an object record. If any required fields are missing, the record creation will fail.

Example:

When an agreement is created, if its total contract value exceeds a specific threshold, a related clause needs to be added automatically. You can achieve this by using the Create Record activity to generate a clause record associated with the agreement.

Properties and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|-------------------|---|
| Properties | |
| Object Name | Search and select the object for which you want to create a record. |

| | |
|------------------------------|--|
| <p>Set Field</p> | <p>Specify fields and their values:</p> <p>Field: Select the field you want to add. You can choose from all available fields in the context object.</p> <p>Value: You can either manually enter the field data or use dynamic values. Place the cursor in the text box, and the system will suggest options based on the field's data type.</p> <ul style="list-style-type: none"> • Manual Entry: Enter the value directly in the text box. Supported data types include standard types as well as more complex types like Lookup, Currency, and Multi-Picklist. <div data-bbox="667 712 1428 981" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Complex data types sample</p> <p>Currency: {"Value":12000}</p> <p>Multi Picklist: ["Large Enterprise","Consumers & Vendors"]</p> </div> <ul style="list-style-type: none"> • Dynamic Entry: Choose lookups, variables, formulas, or context records to automatically populate the value. The system will evaluate and apply the generated value to the corresponding field. To learn more about creating variable and formulas within a workflow, see Creating Workflows. <ul style="list-style-type: none"> • Owner Field Configuration: Select the RecordOwner option in the Field text box to open a dropdown with User and User Group options for setting ownership details. • Lookup Field Configuration: Type in the Field text box to see relevant results under Lookups, along with options like Variable and Formula. <p>To add more fields, click Add. To remove all fields, click Remove All.</p> |
| <p>Entry Criteria</p> | |

| | |
|----------------------------|---|
| <p>Entry Criteria</p> | <p>Set the conditions that must be met to execute the activity.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |
| <p>Description</p> | <p>Provide a description that is relevant to the activity.</p> |

Get Records

The Get Records activity allows you to retrieve a record of any object from the database, store the result in a variable, and use it in subsequent workflow activities for further processing.

- Group: Data
- Nature: Non-Blocking

i When the workflow reaches this activity, it retrieves data from the database based on the specified configurations and criteria. The data is preserved until a blocking activity suspends the workflow. Until then, it can be used in loop, Assignment and update activity.


Example: Managing Expiring Contracts

In a contract management system, the **Get Records** activity helps identify active contracts approaching their expiration dates. You run a specific query on the Contract object to filter records based on criteria such as status or expiration date. Save the filtered results in a variable for easy access in later workflow activities. After retrieving the active contracts, use a **For Loop** to process each contract individually. This setup allows you to send automated notifications to contract owners, create tasks for legal reviews, and log all actions taken.

Properties and activity information

Properties determines the initial behavior of the activity.

| Field | Description |
|-------------------|--|
| Properties | |
| Object Name | Search for and select the object whose records you want to find. |
| Criteria | <p>Set the conditions to narrow down the list of returned records.</p> <ul style="list-style-type: none"> • Field: Select the field you want to use as the condition criterion. This list includes fields associated with the object selected during workflow creation. • Operator: Select the logical operator from the list. This operator defines the relationship between the field and its value. • Value: This field changes based on the selected operator. Enter or select the appropriate value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |

| | |
|---------------------------------|---|
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>Example: <code>Agreement.Name.Contains ("GVS Motors") and Agreement.RecordType= ("MSA")) or Agreement.Status= ("Request")</code></p> <p>You can also use liquid expressions to define criteria based on the context object of the current workflow instance or use variable values. To access the liquid expression editor, click the  icon and select the Expression option.</p> <p>Example: You can use free-form text to match conditions on selected object fields, such as:</p> <ul style="list-style-type: none"> • <code>Name = 'Abc Corp Agreement'</code> • <code>AgreementNumber = 123</code> <p>If the current workflow is defined on the Activity History object and you need to fetch Agreement data, the condition would be:</p> <p><code>Id = '{{Workflow.Context.Record.ObjectId}}'</code></p> |
| <p>Fields</p> | <p>Search and select the fields you want to retrieve for the chosen object. You can add multiple fields.</p> |
| <p>Collection Variable Name</p> | <p>Enter a variable name. The system creates a variable that stores the values of all records fetched based on your specified criteria. You can use this variable later in activities such as Loop, Assignment, and Update for further processing.</p> |

| | |
|------------------|--|
| Records Required | Specify the number of records to be fetched from the database based on the conditions provided. You can choose to fetch either the first record or all matching records. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The maximum number of records that can be fetched is 2,000.</p> </div> |
| Sort Order | Select how you want to display the fetched records: Ascending or Descending. |
| Sort Column | Search and select the column name against which the data should be sorted. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Update Records

The Update Records activity updates the specified record with the field values you provide. You can update records on context objects, related objects, unrelated objects, and record collection variable data. This activity has two outcomes: **Done** and **Fault**.

- Done: Indicates that the update was successful.
- Fault: Indicates that the update failed.

The Fault outcome allows you to decide what actions to take if the update fails. It is triggered only if the database update operation fails. Under the Fault outcome, you can add activities such as sending an email or connecting it to another activity, like iterating through a loop.

- Group: Data
- Nature: Non-Blocking

Example:

When a contract is signed, the system automatically updates its status from "Pending Signature" to "Signed" using the **Update Record** activity. The flow triggers upon signing, updating the contract and possibly related records. If the update is successful, the flow


proceeds with other actions, such as sending notifications. If it fails, an email alert is sent, and the system either retries or moves to another step, ensuring the contract status is updated and errors are managed.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|--|---|
| Properties | |
| Select Type to find records to Update and Set their Values | Select the type to identify the records or related records you want to update and set their values. Based on your selection, the system displays the remaining input elements on the screen. <ul style="list-style-type: none"> • Update context object: Select this option to modify the record of the the Context object linked to your current workflow instance. • Update related object: Select this option to update the record of the Related object associated with your current workflow instance. • Use the IDs and all field values from a record or record collection: This option enables you to update the data stored in the variable created by the Get Records Activity in the database. • Specify conditions to identify record and set fields individually: This option to update record for any object available in the system. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> i The system can fetch and update up to 2,000 records based on the specified criteria. </div> |
| Object | Search and select the context object containing the records you want to update. |
| Related Object | Search and select the related object containing the records you want to update. |

| | |
|-------------------|---|
| Variable Name | Manually enter the Variable Name to update its value by referring to the Get Records activity. This variable's data is stored in the database and was created using the Get Records Activity. It can hold either a single record or a list of records from a specific object. This activity will update the data for both types in the database. |
| Criteria | <p>Set the conditions to narrow down the list of returned records.</p> <ul style="list-style-type: none"> • Field: Select the field you want to use as the condition criterion. This list includes fields associated with the object selected during workflow creation. • Operator: Select the logical operator from the list. This operator defines the relationship between the field and its value. • Value: This field changes based on the selected operator. Enter or select the appropriate value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |

| | |
|----------------------------|--|
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>Example: <code>Agreement.Name.Contains ("GVS Motors") and Agreement.RecordType= ("MSA")) or Agreement.Status= ("Request")</code></p> <p>You can also specify the criteria in Liquid expression format to write conditions based on the current context object fields. To access the liquid expression editor, click the  icon and select the Expression option.</p> <p>Example: If your workflow is defined on the Activity History context object and you need to fetch Agreement data, use the following condition:</p> <p><code>Id= '{{Workflow.Context.Record.ObjectId}}'</code></p> |
|----------------------------|--|

| | |
|------------------------------|--|
| <p>Fields to Update</p> | <p>Specify fields and their values to update:</p> <p>Field: Select the field you want to update. You can choose from all available fields in the context or related object.</p> <p>Value: You can either manually enter the field data or use dynamic values. Place the cursor in the text box, and the system will suggest options based on the field's data type.</p> <ul style="list-style-type: none"> • Manual Entry: Enter the value directly in the text box. Supported data types include standard types as well as more complex types like Lookup, Owner, Currency, and Multi-Picklist. <div data-bbox="743 795 1426 1178" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Complex data types sample</p> <pre>Owner: {"Id":"28c22389-9441-4332-a6db-b4628e4b6cb0","Name":"Admin","OwnerType":"User"} Currency: {"Value":12000} Multi Picklist: ["Large Enterprise","Consumers & Vendors"]</pre> </div> <ul style="list-style-type: none"> • Dynamic Entry: Choose variables, formulas, or context records to automatically populate the value. The system will evaluate and apply the generated value to the corresponding field. To learn more about creating variable and formulas within a workflow, see Creating Workflows. <ul style="list-style-type: none"> • Owner Field Configuration: Select the RecordOwner option in the Field text box to open a dropdown with User and User Group options for setting ownership details. • Lookup Field Configuration: Type in the Field text box to see relevant results under Lookups, along with options like Variable and Formula. <p>To add more fields, click Add. To remove all fields, click Remove All.</p> |
| <p>Entry Criteria</p> | |

| | |
|----------------------------|--|
| <p>Entry Criteria</p> | <p>Set the conditions to narrow down the list of returned records.</p> <ul style="list-style-type: none"> • Field: Select the field you want to use as the condition criterion. This list includes fields associated with the object selected during workflow creation. • Operator: Select the logical operator from the list. This operator defines the relationship between the field and its value. • Value: This field changes based on the selected operator. Enter or select the appropriate value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |
| <p>Description</p> | <p>Provide a description that is relevant to the activity.</p> |

Resume Workflow

The Resume Workflow activity helps to control the process flow by pausing it until necessary conditions are met. It will stay paused until the data changes to meet the specified workflow condition.

- Group: Triggers

- Nature: Blocking

Examples: Employee Onboarding Process

The workflow pauses after HR submits a new hire's details for manager approval. It resumes once the manager approves the onboarding plan

Properties and activity information

Properties determines the initial behavior of the activity.


| Field | Description |
|---------------------|--|
| Properties | |
| Workflow Condition | <p>Set the conditions for resuming the workflow. It stays suspended until these conditions are met.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| Criteria Expression | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> |
| Action Type | <p>The event or condition that initiates a workflow.</p> <ul style="list-style-type: none"> • Update: When a record is updated • Deletion: When a record is deleted |

| Common | |
|--------------|---|
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Start Workflow

The Start activity enables automatic workflow initiation based on data changes such as create, update, or delete. By defining specific criteria, this trigger ensures the workflow only launches when relevant changes occur.

- Group: Triggers
- Nature: Non-Blocking

 The Start activity must be placed at the beginning of the workflow, as it serves as the trigger for workflow execution.

Example: When a user account record is deleted, you may want to trigger a workflow that sends an email notification to the IT and Accounts teams to take the necessary account closure actions.

Properties and activity information

Properties represent the values used to perform the operations of an activity.

| Field | Description |
|-------------------|---|
| Properties | |
| Action Type | The event or condition that initiates a workflow. <ul style="list-style-type: none"> • Create: When a record of the selected object is created • Update: When a record of the selected object is updated • Deletion: When a record of the selected object is deleted |

| | |
|--|---|
| Trigger Condition for Create and/or Delete | <p>Specify fields and their values:</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Trigger Condition for Update | |
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| Criteria Expression | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>For example, (Agreement.Name.Contains ("GVS Motors") and Agreement.RecordType= ("MSA")) or Agreement.Status= ("Request")</p> |
| When to run the workflow for Updated Records | <p>When you select the Update action type, choose one of the following options:</p> <ul style="list-style-type: none"> • Every time a record meets a trigger condition - This option applies whenever you update a record that matches the specified Workflow Condition. • Only when the record is updated to meet the trigger condition - This option applies only when you update a record to match the specific workflow condition provided. |
| Common | |
| Name | Enter the technical name of the activity. |

| | |
|--------------|---|
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Schedule Workflow

The Schedule Workflow activity triggers the workflow at regular intervals based on the specified frequency: weekly, daily, or hourly, with a defined start date and time.

- Group: Triggers
- Nature: Non-Blocking

Example:

To ensure timely contract renewals, set up a workflow that runs daily to check for contracts nearing their expiration. The Schedule Workflow activity triggers notifications based on a defined schedule, such as daily, weekly, or hourly, starting from a specific date and time.

Properties and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|-----------------------|---|
| Properties | |
| Job Type | Select the job type to execute the workflow: <ul style="list-style-type: none"> • Recurring: Triggers the workflow based on the specified frequency. |
| Frequency | Select the frequency at which you want the schedule to workflow execution, like weekly, daily, or hourly. |
| Start Date | Select a date to trigger the workflow. |
| Start Time | Select a time to trigger the workflow; the application supports the UTC time zone. |
| Entry Criteria | |

| | |
|---------------------|---|
| Entry Criteria | <p>Set the conditions that must be met to trigger the workflow.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| Criteria Expression | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Send Email

This activity sends an email to specified recipients. You need to define the recipients, subject, body type, and email content. When the workflow reaches this activity, the email is sent to all defined recipients with the specified body content.

- Group: Communication
- Nature: Non-Blocking

Example:

If a contract is rejected during the review process, the workflow automatically sends a fixed rejection email to the submitter.

Properties and activity information

Properties determines the initial behavior of the activity.

| Field | Description |
|--------------------------|---|
| Properties | |
| Recipient Type | Select the type of recipients for the email. Multiple options can be selected. Based on your selection, the system displays the remaining input elements on the screen. <ul style="list-style-type: none"> • User: Sends the email to a specific user(s). • User Group: Sends the email to all users within a selected group. • Field: Allows you to search for fields in the context object that have a lookup to User, User Group, or Contact. You can select one of these fields to send the email accordingly. • Expression: Allows to use constants, variables, or formulas to dynamically update the recipient's email address. |
| To Addresses | Search for and select recipient email addresses from the list. You can also add email addresses that are not part of the application's user list. |
| CC Addresses | Search for and select email addresses to send a copy (CC) of the email. You can also add email addresses that are not part of the application's user list. |
| Field | Search for and select a field(s). For example, ActivatedBy. |
| Additional Email Address | Search and select a constant, variable, or formula to dynamically update the recipient's email address. |
| From Address | Enter the sender's email address. |
| From Name | Enter the sender's name. |

| | |
|----------------|---|
| Subject | Enter the subject line of the email. |
| Body Text Type | Select the format for the email content: <ul style="list-style-type: none"> • HTML: Use for rich text formatting. • Plaintext: Use for simple text. |
| Body | Enter the formatted email content. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Send Email by Template

This activity sends an email to specified recipients using a pre-defined email template. You need to define the recipients, subject, body type, and email content. You can select the pre-defined template to be used for the email body.

- Group: Communication
- Nature: Non-Blocking

Example: Automated Task Assignment Notification

When a new task is assigned, the system will automatically send an email to the specified recipients using the pre-defined template, dynamically including the assignee's name.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|-------------------|-------------|
| Properties | |

| | |
|----------------------------|--|
| Recipient Type | <p>Select the type of recipients for the email. Multiple options can be selected. Based on your selection, the system displays the remaining input elements on the screen.</p> <ul style="list-style-type: none"> • User: Sends the email to a specific user(s). • User Group: Sends the email to all users within a selected group. • Field: Allows you to search for fields in the context object that have a lookup to User, User Group, or Contact. You can select one of these fields to send the email accordingly. • Expression: Allows to use constants, variables, or formulas to dynamically update the recipient's email address. |
| To Addresses | Search for and select the recipient email addresses from the list. You can also add email addresses that are not part of the application's user list. |
| CC Addresses | Search for and select email addresses to send a copy (CC) of the email. You can also add email addresses that are not part of the application's user list. |
| Field | Search for and select a field(s). For example, If the Context Object is "Assignment," you will find a field named "ActivatedBy" in the list. |
| Additional Email Addresses | Search and select a constant, variable, or formula to dynamically update the recipient's email address. |
| From Address | Enter the sender's email address. |
| From Name | Enter the sender's name. |
| Template | Search for your email template using the name of the notification email template and select the email template. |

| | |
|------------------------------|---|
| <p>Template Data</p> | <p>Allows updating email content dynamically. If your template contains a placeholder (merge field) in the email body, you can define the corresponding template data to update it.</p> <p>For example,</p> <p>If your email body includes a placeholder like <code>{{ TemplateData.AssigneeName }}</code>, you can update the assignee name by entering the specific template data pair: AssigneeName: ID.</p> <p>When the email is sent, <code>{{ TemplateData.AssigneeName }}</code> will be replaced with the actual value, such as "John Doe".</p> |
| <p>Entry Criteria</p> | |
| <p>Entry Criteria</p> | <p>Set the conditions that must be met to trigger the workflow.</p> <ul style="list-style-type: none"> • Field: Select the field you want to set as the condition criterion. It lists fields associated with the object you have selected at the time of workflow creation. • Operator: You must select the logical operator from the list. This forms the relationship between the field and its value. • Value: The value field changes based on the selected operator options. Enter or select the value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter "(1 AND 2 AND 3) OR 4", the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> <p>For example, (Agreement.Name.Contains ("GVS Motors") and Agreement.RecordType= ("MSA")) or Agreement.Status= ("Request")</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |

| | |
|-------------|---|
| Description | Provide a description that is relevant to the activity. |
|-------------|---|

Execute Custom API

Executes custom code by invoking a custom API. This activity executes custom APIs registered within the Conga RLM system.

Prerequisite: A custom code to be executed must exist within the Conga RLM system and be registered as an API resource

Use Case: Sending a Custom Notification After Contract Termination

When the contract is terminated, the workflow will execute the custom code and use the Custom API to notify legal and compliance teams immediately.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|-------------------|---|
| Properties | |
| Custom API | Select the custom API you want to execute. |
| Route | Specify the route for the custom API. (e.g., /notifications/contractTermination) |
| Method | Select the configured method of the custom API (e.g., GET, POST). |
| Request Body | Enter the request body for the API call if required. |
| Query Params | Add optional parameters to send with the request. (e.g., status=active) To add multiple parameters, click Add . To remove all parameters, click Remove All . |
| Output | |

| | |
|-----------------------|---|
| Activity Output | Enter a variable name to store the output. The system creates a variable that holds the data you fetch based on specified properties. |
| Entry Criteria | |
| Entry Criteria | <p>Specify fields and their values:</p> <ul style="list-style-type: none"> • Field: Select the field you want to use as the condition criterion. This list includes fields associated with the object selected during workflow creation. • Operator: Select the logical operator from the list. This operator defines the relationship between the field and its value. • Value: This field changes based on the selected operator. Enter or select the appropriate value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| Filter Expression | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| Criteria Expression | Displays the criteria expression based on the selected field, operator, and value condition. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Internal Webhook

Invokes internal APIs.

Prerequisite: API must exist within the Conga RLP.

Use Case: Suppose you want to fetch active user data from an API:

- URL: `https://api.example.com/users`
- Method: `GET`
- Content: (Leave blank for GET requests)
- Request Headers: Content-Type: application/json
- Query Params: `status=active`

In this case, you can name the output variable `activeUsers`, where the system will store the fetched user data.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

| Field | Description |
|-------------------|--|
| Properties | |
| URL | Enter the URL to which you will send the HTTP request. |
| Method | Select the HTTP method for the request (e.g., GET, POST). |
| Content | Enter the HTTP JSON content to include with the request. |
| Request Headers | Specify additional headers to send with the request. To add multiple parameters, click Add . To remove all parameters, click Remove All . |
| Query Params | Enter query parameters to send with the request. To add multiple parameters, click Add . To remove all parameters, click Remove All . |
| Output | |

| | |
|-----------------|--|
| Activity Output | Enter a variable name to store the output. The system will create a variable that holds the data based on your specified properties. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Chain Stage

Executes another staged workflow as a sub-workflow where you want to create a chain of execution to run another child workflows.

Pre-requisite: Stage (child workflow) must be published. For more information, see Working with Stages.

Use Case: Job Application Process

When a candidate applies, the main workflow starts. The **Chain Stage** first runs the **Screening Workflow** to check qualifications. After that, the **Interview Scheduling Workflow** runs to set up interviews. Finally, the **Decision Workflow** runs to approve or reject the candidate.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and Entry Criteria serve as conditions that determine whether an activity should be executed.

 The chain stage does not execute if the entry criteria do not match.

| Field | Description |
|-----------------------|--|
| Properties | |
| Workflow | Search and select the staged workflow. |
| Entry Criteria | |

| | |
|----------------------------|---|
| <p>Entry Criteria</p> | <p>Specify fields and their values:</p> <ul style="list-style-type: none"> • Field: Select the field you want to use as the condition criterion. This list includes fields associated with the object selected during workflow creation. • Operator: Select the logical operator from the list. This operator defines the relationship between the field and its value. • Value: This field changes based on the selected operator. Enter or select the appropriate value for the specified field. <p>To add more conditions, click Add Criteria. To remove all conditions, click Remove All.</p> |
| <p>Filter Expression</p> | <p>By default, the application applies AND logic to all criteria. You can adjust this to create more complex logical expressions if needed. You can customize your logic using parentheses, AND, OR, and NOT.</p> <p>For example, if you enter “(1 AND 2 AND 3) OR 4”, the system will evaluate whether all three of the first conditions are true, or if the fourth condition is true.</p> |
| <p>Criteria Expression</p> | <p>Displays the criteria expression based on the selected field, operator, and value condition.</p> |
| <p>Common</p> | |
| <p>Name</p> | <p>Enter the technical name of the activity.</p> |
| <p>Display Name</p> | <p>This field auto-populates but can be changed if needed.</p> |
| <p>Description</p> | <p>Provide a description that is relevant to the activity.</p> |

End Stage

This activity marks the previous stage as completed in the workflow execution. It can only be used within stages, not directly in the main workflow. You can create a stage from the **Stages** menu in the workflow. When the workflow reaches this activity, the previous stage is updated to "Completed".

- Group: Stages

- Nature: Non-Blocking

Activity Information

The information entered for the activity is displayed on the activity tile within the workflow pane.

| Common | |
|--------------|---|
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Go to Stage

Allows jumping to or restarting any stage based on specified conditions. This activity is used within a Stage Workflow, where multiple stage workflows are configured to run in sequence.

Prerequisite: Next stage to jump to or re-run must exist within a system.

Properties, Entry Criteria and activity information

Properties represent the values used to perform the operations of an activity and common information entered for the activity is displayed on the activity tile within the workflow pane.

| Field | Description |
|-------------------|---|
| Properties | |
| Next Stage | Search for and select the stage to jump to or re-run. |
| Common | |
| Name | Enter the technical name of the activity. |
| Display Name | This field auto-populates but can be changed if needed. |
| Description | Provide a description that is relevant to the activity. |

Managing Notifications

Overview

Alerts and notifications are essential components of quote-to-cash flow, particularly in the context of contract management and complex quotation systems. The users are informed about important events, updates, or changes regarding important dates, milestones, and actions throughout the revenue life cycle process through alerts and notifications. Notifications and alerts are supported through different delivery channels – In-app and Email alerts with configurable timings – either one time or reminder.

Here are some (not the only) key points that highlight their importance:

- **Timely Reminders:** Alerts and notifications provide stakeholders with timely reminders about crucial contract dates, milestones, and actions. This ensures that all parties involved are informed of critical deadlines, avoiding oversights and missed opportunities.
- **Contractual Compliance:** Contract notifications assist in ensuring that all parties concerned follow their contractual duties. Notifications can be set up for important contractual milestones, payments, and other responsibilities, lowering the risk of non-compliance and legal problems.
- **Risk Mitigation:** The real-time notifications enable stakeholders to quickly detect and resolve any problems. This proactive approach helps to mitigate risks before they escalate, protecting the interests of all parties involved.
- **Improved Decision-making:** Accurate and timely information is essential to making informed decisions. Alerts and notifications provide stakeholders with the information they need to make strategic decisions about contracts, quotations, and other important elements of the business.
- **Efficient Contract Management:** Alerts help organizations deal with large numbers of contracts by streamlining the administration process. They assist in tracking contract statuses, renewals, and amendments, allowing for more efficient management of a huge number of contractual agreements.
- **Customer Satisfaction:** In instances of complex proposals, accurate and timely notifications improve customer satisfaction. Stakeholders may reply quickly to customer inquiries, change quotes, and maintain a seamless and transparent communication process.
- **Productivity and Accountability:** Notifications improve productivity by keeping all stakeholders on the same page. They also promote accountability because

individuals are aware of their tasks and deadlines, resulting in a more organized and efficient work environment.

- **Customization and Personalization:** Effective alert systems enable modification and customization based on the individual requirements of stakeholders. This ensures that individuals receive relevant and actionable information based on their roles and responsibilities.

Where can you use notifications?

Anywhere! The Alert and Reminder notifications can be used with:

- Contract Management
- Quotation Management
- Approvals Management
- And more!!

Here are some (not the only) common scenarios where alerts and reminder notifications are used based on the persona and department:

| Persona/Department | Scenario |
|---|---|
| <p>Contract Manager, Contracts Management</p> | <ul style="list-style-type: none"> • Contract Expiration Alerts: Alerts can be set to notify contract managers and stakeholders when contracts are nearing their expiration dates. This allows them to take appropriate actions, such as initiating contract renewals or renegotiations promptly. • Renewal Deadlines Notifications: Notifications can be used to remind contract managers about upcoming renewal deadlines. This helps them proactively engage with the relevant parties and initiate discussions well in advance to ensure a smooth renewal process. • Milestone Reminders: Contracts often have critical milestones or events that require specific actions or deliverables. Alerts and notifications can be set to remind stakeholders about these milestones, ensuring that tasks are completed on time and in accordance with the contract terms. • Approval Notifications: In complex contracting processes, notifications can be used to inform relevant parties about pending contract approvals. This keeps everyone involved updated on the status of the contract and allows them to take appropriate actions or provide necessary input. • Contract Amendments: When amendments or modifications are made to existing contracts, alerts can be sent to notify stakeholders of the changes. This helps ensure that all parties are aware of the updated terms and conditions and can adjust their activities accordingly. • Compliance and Obligations: Alerts and notifications can be used to remind contract managers and stakeholders about compliance requirements and contractual obligations. This includes deadlines for submitting reports, making payments, or fulfilling specific contractual commitments. |

| Persona/Department | Scenario |
|--|---|
| | <ul style="list-style-type: none"> • Risk Management: Alerts can be triggered to notify contract managers about potential risks associated with contracts. This can include alerts for contracts with high-dollar values, contracts with unusual terms, or contracts nearing expiration without a clear plan for renewal or termination. |
| Managers, Sales Teams, Legal Team, CPQ | <ul style="list-style-type: none"> • Sales teams should be notified if a configured product is out of stock or in limited supply, helping them avoid promising products that cannot be delivered promptly. • Alerts are to be used to notify relevant stakeholders, such as managers or legal teams, when a quote requires approval, ensuring that the sales process flows smoothly and complies with company policies. • Sales representatives and customers should be alerted when a quote is approaching its expiration date, prompting timely follow-up and potential renegotiation. |

Select one of the following topics for more information on notification management:

- [Creating Email Notifications](#)
- [Creating In-App Notifications](#)
- [Working with Notifications](#)


Creating Email Notifications

This section describes the process of creating notifications for email alerts and reminders. These notifications are essential for keeping users informed about important tasks and deadlines, even when they are not actively using the app. By leveraging email notifications for alerts and reminders, you can enhance communication, improve task management, and ensure that critical deadlines are met without hassle.




For example, notifications can remind contract managers about upcoming renewal deadlines. This helps them proactively engage with the relevant parties and initiate discussions well in advance to ensure a smooth renewal process.

To create a notification


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

2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Notification Manager. A list of notifications appears.
3. Click **New Notification**.
4. Enter or select values for the following fields:

| Field | Description |
|--------------------------------|---|
| Basic Information | |
| Notification Name | Enter a name for the notification. |
| Status | Select the status (Active, Inactive, or Draft) of the notification. |
| Channels | Select the channel for the notification. Currently, only the email channel is supported. |
| Object | Select the object for which you want to create the notification. |
| Description | Enter a description for the notification. When looking at a list of notifications, a meaningful description may help you remember their differences. |
| Apply for the existing records | Enable this toggle and add record filter condition criteria to send the notification to existing records. |
| Conditions | |
| Conditions Criteria | Click the Generate Records Filter Criteria button and define the criteria and filter expression to send the notification to existing records. |
| Triggers | |
| Evaluate Criteria On Trigger | Enable this toggle to check criteria when the notification is triggered. This means the application only considers records that meet the trigger condition at the time the notification is triggered. |

| Field | Description |
|----------------|---|
| Criteria | <p>Click the Generate Criteria button to define the criteria and filter expression.</p> <p>On the Criteria popup,</p> <ul style="list-style-type: none"> • Click the Add Criteria option to define the field, operator, and value. Once you have multiple criteria, you can include the logic in the Filter Expression section using the AND and OR operators. • Use the Delete icon to remove the individual criteria. • Use the Remove All link to remove all criteria. |
| Frequency | <p>Select the frequency (one-time or recurring) from the list.</p> <ul style="list-style-type: none"> • One Time: Select the On Date, Before Date, or After Date timeframe. For the Before and After Date timeframes, you must also set a Number value. • Recurring: Select the recurring frequency: Daily, Weekly, Monthly, or Yearly. <div data-bbox="703 1133 1426 1296" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For recurring frequency, you can also see the end date section option to set the end date for the notification.</p> </div> |
| Date Selection | <ul style="list-style-type: none"> • Select the Select a Field option to set the date based on the field available on the object. • Select the Calendar Date option to set the exact date and time. <div data-bbox="703 1561 1426 1686" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For recurring frequency, you must set the Begins and Ends date selection.</p> </div> <div data-bbox="703 1697 1426 1901" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; background-color: #fff9e6;"> <p> The date format is determined by the user's short date format. If the user level format is not specified, the application uses the organization level short date format.</p> </div> |

| Field | Description |
|-------------------------------|--|
| Content and Recipients | |
| From | This field auto-populates with the logged-in user's email ID. |
| Recipient Type | <p>Select the recipient type as user, user group, and/or field.</p> <ul style="list-style-type: none"> • User and User Group: You have the following two options: <ul style="list-style-type: none"> • Search and select the user and/or user group from the provided options. • Enter their email address directly into the "To" field. <p>To include users in the Cc and Bcc fields, click on the "Cc" and "Bcc" links respectively.</p> <ul style="list-style-type: none"> • Field: Select the object and corresponding field(s) to get recipient details. Only fields with a lookup relationship to the user, user group, or contact objects are visible in the Fields selection. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i The Owner field appears in the Field dropdown for all custom and out-of-the-box objects.</p> </div> <div style="border: 1px solid #8ebf8e; padding: 5px; margin-top: 10px;"> <p>✓ If the recipient is a user group and you want send notifications (email and in-app) to all members of the group, you must enable the Is Send Email to User Group Members toggle for the relevant user group. For more information, see Creating User Groups.</p> </div> |

| Field | Description |
|----------------|---|
| Email Template | <p>Select an email template from the list.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Once the email template is selected, the email subject and body automatically populate based on the selected template, and you won't be able to modify them. However, if you opt not to select a template, you can manually add the email subject and body.</p> </div> |
| Email Subject | Enter the email subject line. |

Creating In-App Notifications

This section describes the process of creating notifications for in-app alerts and reminders within the application. These notifications are designed to ensure that users stay informed about important tasks and deadlines, thereby improving productivity and task management.

You can create a variety of tasks and assign them to individual users or user groups. The in-app notification feature allows for efficient task delegation and tracking within the system. When a task is assigned, the respective user or group receives an in-app notification. This prompt ensures they are immediately aware of the new assignment and can take the necessary actions promptly.

For example, consider a scenario where you need to complete the approval process for a specific contract. You can create multiple tasks that outline the steps required for the approval. These tasks might include reviewing the contract, making necessary amendments, obtaining signatures, and finalizing the document. You create and assign respective tasks to the relevant users or groups responsible for each step. Each assigned user will receive an in-app notification, prompting them to complete their respective task and move the process forward.

Benefits:


- **Timely Alerts:** Users are promptly informed about new tasks and updates.
- **Improved Coordination:** Clear assignments and notifications enhance collaboration among team members.
- **Accountability:** Users are held accountable for their assigned tasks, as they receive reminders and status updates.

- **Efficiency:** Streamlined task management and notifications lead to more efficient completion of tasks.

Prerequisites



- The in-app notification feature flag is ON. Contact the Product Engineering team to enable the feature flag.



To create an in-app notification

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Notification Manager. A list of notifications appears.
3. Click **New Notification**.
4. Enter or select values for the following fields:

| Field | Description |
|--------------------------------|--|
| Basic Information | |
| Notification Name | Enter a name for the notification. |
| Status | Select the status (Active, Inactive, or Draft) of the notification. |
| Channels | Select the In App channel. |
| Object | Select the object for which you want to create the notification. |
| Description | Enter a description for the notification. When looking at a list of notifications, a meaningful description may help you remember their differences. |
| Apply for the existing records | Enable this toggle and add record filter condition criteria to send the notification to existing records. |
| Triggers | |

| Field | Description |
|------------------------------|---|
| Evaluate Criteria On Trigger | <p>Enable this toggle to check criteria when the notification is triggered. This means the application only considers records that meet the trigger condition at the time the notification is triggered.</p> |
| Criteria | <p>Click the Generate Criteria button to define the criteria and filter expression.</p> <p>On the Criteria popup,</p> <ul style="list-style-type: none"> • Click the Add Criteria option to define the field, operator, and value. Once you have multiple criteria, you can include the logic in the Filter Expression section using the AND and OR operators. • Use the Delete icon to remove the individual criteria. • Use the Remove All link to remove all criteria. |
| Frequency | <p>Select the frequency (one-time or recurring) from the list.</p> <ul style="list-style-type: none"> • One Time: Select the On Date, Before Date, or After Date timeframe. For the Before and After Date timeframes, you must also set a Number value. • Recurring: Select the recurring frequency: Daily, Weekly, Monthly, or Yearly. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i For recurring frequency, you can also see the end date section option to set the end date for the notification.</p> </div> |

| Field | Description |
|-------------------------------|---|
| Date Selection | <ul style="list-style-type: none"> • Select the Select a Field option to set the date based on the field available on the object. • Select the Calendar Date option to set the exact date and time. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For recurring frequency, you must set the Begins and Ends date selection.</p> </div> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> The date format is determined by the user's short date format. If the user level format is not specified, the application uses the organization level short date format.</p> </div> |
| Content and Recipients | |
| From | This field auto-populates with the logged-in user's email ID. |

| Field | Description |
|----------------|---|
| Recipient Type | <p>Select the recipient type as user, user group, and/or field.</p> <ul style="list-style-type: none"> • User and User Group: You have the following two options: <ul style="list-style-type: none"> • Search and select the user and/or user group from the provided options. • Enter their email address directly into the "To" field. <p>To include users in the Cc and Bcc fields, click on the "Cc" and "Bcc" links respectively.</p> • Field: Select the object and corresponding field(s) to get recipient details. Only fields with a lookup relationship to the user, user group, or contact objects are visible in the Fields selection. <div data-bbox="842 954 1426 1120" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> The Owner field appears in the Field dropdown for all custom and out-of-the-box objects.</p> </div> <div data-bbox="719 1178 1426 1462" style="border: 1px solid #90EE90; padding: 5px; margin-top: 10px;"> <p> If the recipient is a user group and you want send notifications (email and in-app) to all members of the group, you must enable the Is Send Email to User Group Members toggle for the relevant user group. For more information, see Creating User Groups.</p> </div> |
| Title | Enter the notification title for the user. |
| Message | Enter the notification message for the user. |

5. Click **Save**.

Once the notification is triggered, users can manage their notifications by using the notification (bell) icon located at the top right of the screen. The **Bell** icon provides quick access to all notifications and helps users stay on top of important updates and tasks. Unread notifications are highlighted with a white background, making them easily distinguishable from read notifications.

Each notification is linked to the related record or object, providing direct access to the pertinent details. Clicking on a notification redirects the user to the related detail page. This allows users to quickly review the relevant record or object associated with the notification. Users can filter notifications to see only unread, read, or both. Clicking a notification marks it as read, but users can manually change the status of notifications back to unread if further action or review is needed. This helps in keeping track of ongoing tasks or follow-ups.

Working with Notifications

After you create a notification, you can view, edit, and delete the notification from the list page. You can manage column width, filter the records in the grid by performing a keyword search or apply one or more advanced filters and filter logic. For more information, see [Filtering Records](#).

To view the notification information, click the **Name** link from the Notifications List page.

To activate or deactivate a notification

1. Click the **More** (⋮) icon at the start of the notification record.
2. Click **Enable** to activate the notification, or **Disable** to deactivate it.

To edit a notification

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

To delete a notification

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

Conversion Management

In a global business with operations in various locations, transactions often involve converting currencies, units of measure (UOM), and frequencies. Conversion Management allows you to quickly create and maintain conversion rates for currencies, UOMs, and frequencies.

Select one of the following topics for more information on each of the conversions:

- [Adding Currency Conversions](#)
- [Adding Unit of Measure \(UOM\) Conversions](#)
- [Adding Frequency Conversions](#)


Adding Currency Conversions

Currency conversion is specified inside a currency rate policy, allowing for flexibility in dealing with multiple rates. The exchange rate can be set based on the current market rate, allowing for flexibility in dealing with changes in currency values. The currency exchange rate is bidirectional, which is important. For example, if the USD to INR rate is x , the reciprocal rate is automatically calculated as $1/x$. This bidirectional functionality assures consistency and convenience of use when converting currencies in both directions.

The following is an example of an organization that uses Conga CPQ in different geographic regions with multiple business transactions:


The headquarters of a company is in the US, and branches are in India and London. The main price list is defined by the marketing team in the US in USD; however, an administrator in India creates a quote that is based on a child price list, and the child price list is based on the price list created by the team in the US. The child price list is defined by the sales team in India in INR currency. In this scenario, the sales representative can simply define currency conversion rates, and the application converts currencies automatically.

To add a currency conversion

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Conversion Management**.
3. Click **New**.
4. Enter or select values for the following fields:

| Field | Description |
|-----------------------------|--|
| Source Currency | Search and select the currency you are converting from. |
| Target Currency | Search and select the currency you are converting to. |
| Effective Start Date & Time | Select the effective start date and time when the currency conversion begins to take effect. |
| Effective End Date & Time | Select the effective end date and time when the currency conversion will no longer be effective. |
| Conversion Rate | Define a conversion rate for the currency. The exchange rate can be a decimal or a whole number. |

- Click **Save & New** to save the created currency conversion and continue creating a currency conversion, or click **Save** to save the created currency conversion.

 You can edit and delete the currency conversion by clicking the More (⋮) icon and then selecting the Edit or Delete option for the relevant Currency Conversion Rate from the list.

Once the conversion record is created, you can filter the records in the grid by performing a keyword (basic) search or applying one or more advanced filters and filter logic. For more information on keyword search and advanced search, see [Filtering Records in the Grid View](#).


Adding Unit of Measure (UOM) Conversions

The Unit of Measure (UOM) represents the magnitude of a quantity. It is used to define and communicate the quantity of products in various business processes such as selling, invoicing, billing, return fulfillment, shipping, and more. Each product can be associated with multiple units of measurement. This flexibility allows a company or an organization within a company to sell a specific product using different units of measure based on business requirements or customer preferences.

UOM conversion is required for ease of maintenance. The pricing administrator can set the price once and perform a UOM conversion. UOM conversion can be set for the particular product.

UOM conversion is performed when units included in the transaction differ from the primary unit of the item being transacted.

To add a UOM conversion

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Conversion Management**.
3. Click **UOM Conversion Rates**.
4. Click **New**.
5. Enter or select values for the following fields:

| Field | Description |
|-----------------|---|
| From UOM | Select a unit of measure from the dropdown list that can be used as a source for rate conversion. |
| To UOM | Select a UOM for which the conversion rate is defined. |
| Product | Search and select the name of the product for which the conversion must be applied. If the product field is blank, then the UOM is applicable for all products. |
| Conversion Rate | Define a conversion rate for the UOM. |

6. Click **Save & New** to save the created UOM conversion and continue creating another UOM conversion, or click **Save** to save the created UOM conversion.

 You can edit and delete the UOM conversion by clicking the More () icon and then selecting the Edit or Delete option for the relevant UOM Conversion Rate from the list.

Once the conversion record is created, you can filter the records in the grid by performing a keyword (basic) search or applying one or more advanced filters and filter logic. For more information on keyword search and advanced search, see [Filtering Records in the Grid View](#).


Adding Frequency Conversions

The frequency conversion is used to define and communicate the frequency of recurring products and services in various business processes such as selling, invoicing, billing, return fulfillment, shipping, and more. Each product can be associated with multiple frequencies.

This flexibility allows a company or an organization within a company to sell a specific product and bill the customer at different frequencies based on business requirements or customer preferences.



Frequency conversion is required for ease of maintenance. The pricing administrator can set the price once and perform a frequency conversion. Frequency conversion can be set for the particular product.

To add a frequency conversion

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Conversion Management**.
3. Click **Frequency Conversion Rates**.
4. Click **New**.
5. Enter or select values for the following fields:

| Field | Description |
|-----------------|---|
| From Frequency | Select a frequency from the dropdown list that can be used as a source for rate conversion. |
| To Frequency | Select a frequency for which the conversion rate is defined. |
| Product | Search and select the name of the product to which the conversion must be applied. If the product field is blank, then the frequency conversion is applicable for all products. |
| Conversion Rate | Define a conversion rate for the frequency. |

6. Click **Save & New** to save the created frequency conversion and continue creating another frequency conversion, or click **Save** to save the created frequency conversion.

 You can edit and delete the frequency conversion by clicking the More () icon and then selecting the **Edit** or **Delete** option for the relevant frequency conversion rate from the list.

Once the conversion record is created, you can filter the records in the grid by performing a keyword (basic) search or applying one or more advanced filters and filter logic. For more information on keyword search and advanced search, see [Filtering Records in the Grid View](#).

Managing Custom Code

Custom Code provides greater flexibility to extend the abilities of applications within the Conga Platform. For example, you can apply custom pricing on the line items in the cart.

You can write code from scratch, leverage callback templates tailored for different products such as Revenue, Approvals, and Contracts, or create a service hook to trigger a specific action. The module also supports importing projects via a .zip file and includes a feature for defining resources (APIs) for use within custom code projects.

After the custom code is developed, you can map it to product-specific callbacks, projects, and classes to establish a connection between the custom code project and the product. You can then create a service hook rule to specify when the custom code should execute based on particular conditions met on the product side. For more information, see [Managing Service Hooks](#).

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

- [Getting Started with Custom Code](#)
- [Deploying a Custom Code Project](#)
- [Importing Custom Code](#)
- [Working with Custom Code through the User Interface](#)
- [Developing Custom Code API](#)
- [Mapping Custom Code](#)

Getting Started with Custom Code

You can add or modify the application behavior by writing custom code. You can either write code from scratch, use callback templates tailored for different products such as Revenue, Approvals, and Contracts, or create a service hook to trigger a specific action. This section shows you how to configure the development environment and deployment process to use the Conga Platform's Custom Code and Service Hooks module. Review the following topics for more information.

- [Setting Up a Custom Code Environment](#)
- [Configuring a Bitbucket Repository with Conga Platform](#)
- [Developing Custom Code](#)

Setting Up a Custom Code Environment

This topic outlines all the necessary steps to set up a custom code development environment (Bitbucket repository). Both the Conga team and customer admin are involved in this process.

Provide the following information to your Conga support representative, who will log an IT ticket for a custom code environment setup:

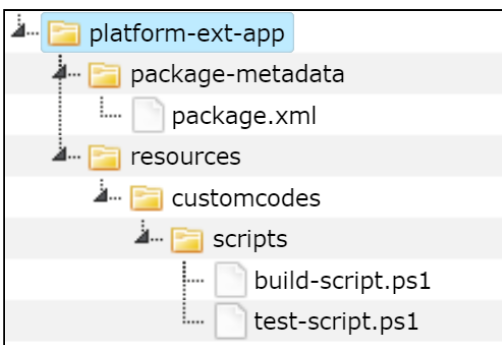
- **Customer Name:** Your company account name that is provisioned with the Conga Platform.
- **Project Name:** The Conga team uses this name to create a Bitbucket repository.
- **Repository Name:** The Conga team uses this name to create a Bitbucket repository.
- **Repository Information (Owner Name and Email Address):** The name and email address of the administrator who will own the Bitbucket repository.

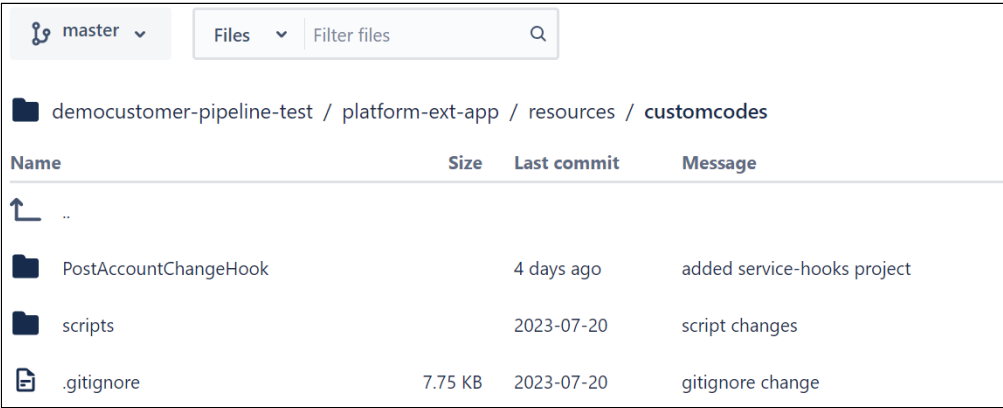
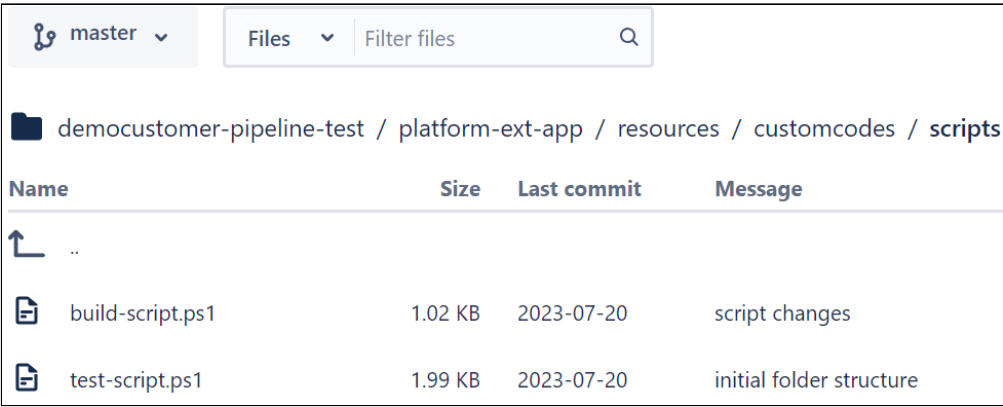
The Conga IT team sets up the Bitbucket repository, which includes the initial folder structure for custom code development and manifest and script files for the CI pipeline. To learn more about the default folder structure, see [Repository Folder Structure](#).

Once the repository is available for development, the repository owner can create the necessary branches and clone the repository to a local machine for custom code development. The repository owner can also share access with team members who will develop custom code.

Repository Folder Structure

When accessing the repository, you also get access to a continuous integration (CI) pipeline. This pipeline is built using Bitbucket's pipeline feature. Below is the initial structure of the repository created for custom code development:





| Folder Name | Description |
|------------------|---|
| platform-ext-app | <p>Contains "resources" and "package-metadata" folders, and a bitbucket-pipelines.yml file defining the CI pipeline for custom code. This YAML file generates the artifact package based on the configured branch.</p> |
| resources | <p>Contains supported resources for development, such as "customcodes". Also, custom code projects created using the provided .Net templates are located in this folder.</p> <p>For example, the "resources" folder contains one custom code project named PostAccountChangeHook. It could be created for use cases like callback, servicehook, etc.</p> <div data-bbox="311 768 1319 1173" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <p>Additionally, the "scripts" folder contains build and test PowerShell scripts for building and testing .NET projects.</p> <div data-bbox="311 1290 1319 1695" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> |

| Folder Name | Description |
|------------------|---|
| package-metadata | <p>Contains a package file in .xml format. The package.xml file allows specifying which custom code projects to include in the build artifact (custom code deployment package). Enter "*" to include all custom code projects or specify comma-separated custom code project names to include in the build artifact.</p> <pre data-bbox="309 577 1426 1025"> <package> <resources> <resource> <name>customcodes <name> <includes>*/includes> </resource> </resources> <version>1.0</version> </package> </pre> |

Configuring a Bitbucket Repository with Conga Platform

Repository configuration is useful for linking a repository to a specific platform instance. Once connected, you can deploy code directly from Bitbucket using deploy APIs, rather than uploading a zip file manually. All deployed custom code can be viewed on the Custom Code listing screen.

To configure a repository

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Custom Code**.
3. Click the More () icon.
4. Select **Repository Configuration**.
5. Enter or select values for the following fields:

| Field | Description |
|-----------------|---|
| Repository Name | Enter the Bitbucket repository name where all custom code packages are stored. |
| Branch Name | Enter the name of the branch being configured for the tenant on which the package is being deployed. |
| Access Token | Enter the password for accessing the Bitbucket repository through the Conga Revenue Lifecycle Platform. For more information on how to create an access token, see Creating a Bitbucket Repository Access Token . |

6. Click **Save**. A confirmation message appears.

All the custom code packages are now accessible within the custom code user interface.

Creating a Bitbucket Repository Access Token

Repository access tokens are single-purpose access tokens (or passwords) with access to a single repository with limited permissions (specified at creation time). The Conga Platform uses the access token to get a list of build artifacts.

To create a repository access token:

1. At bitbucket.org, navigate to the target repository for the access token. This repository is the only one that the repository access token can access.
2. On the sidebar, select **Repository Settings**.
3. On the sidebar, under Security, select **Access tokens**.
4. Select **Create Repository Access Token**.
5. Give the repository access token a name, usually related to the app or task that will use the token.
6. Select the **Read scope** for the repository access token permission.
7. Click the **Create** button to raise the "Repository Access Token created" dialog.
8. Copy the generated token and either record or paste it into the app that requires access. *This token is only displayed once and cannot be retrieved later.* Rather than recovering or reusing a repository access token, create a new token and consider revoking the old token.

Developing Custom Code

This section describes creating a custom code project. You can create a custom code project using either Visual Studio 2022 Community or Visual Studio Code. Creating a custom code project involves:

- **Installing NuGet Templates:** Install the NuGet templates from the NuGet feed onto your local machine.
- **Creating a Project:** Use a relevant template to create a new callback and service hook project.
- **Building a Project:** Once your callback and serviceHook project is developed locally and built without errors, a zip file is automatically generated at the project path. This zip file is ready to be pushed to the import API for deployment on the Conga RLC.

Prerequisites

- Visual Studio 2022 Community or Visual Studio Code is installed. For more details about installation, see [Download Visual Studio 2022 Community](#) or [Download Visual Studio Code](#).
- NuGet templates for custom code development are downloaded. Please get in touch with Conga Support for more details about the list of default NuGet templates provided by Conga.
- The OOTB objects and APIs used in custom code are trusted. For more information about adding trusted objects and APIs, see [Managing Trusted Objects](#) and [Managing Trusted APIs](#).
- All .NET class library types in use are supported. To access the list of banned types, see [.NET Class Library Usage](#).

To create a custom code project using Visual Studio Code

1. Open Visual Studio Code.
2. Go to Menu > View, and select **Terminal** from the list, or press **Ctrl + `** (backtick) on your keyboard.
3. Uninstall existing templates by running the following command before installing the NuGet template.
 - a. View the list of existing templates.

```
dotnet new --uninstall
```


- b. Check for the `Conga.Platform.Extensibility.Templates` entry in the list and if it is available, run this command to remove it.

```
dotnet new uninstall Conga.Platform.Extensibility.Templates
```

- c. Verify by re-running step a.

4. Run this command to install a specific version of the NuGet template. Version is the NuGet version number, such as `2023.X.X.X` or `latest`. Please get in touch with Conga Support for more details about the list of default NuGet templates provided by Conga.


```
dotnet new install <NuGet Templates Package Name>::<version>
```

For example:

```
dotnet new install Conga.Platform.Extensibility.Templates::202311.1.0.44
```

5. Go to the project directory using the command:

```
cd <Callback Template ShortName>
```

-  If it must be part of a new directory, first create a directory using these command:

```
md <Callback Template ShortName>
```

```
mkdir <Callback Template ShortName>
```

6. Now you are ready to create a callback or service hook custom code project using a template. Run the following command to create a custom code project. Use the proper ShortName for the template and ensure that you are in the directory where you want to create a callback or service hook custom code project. The project name you specify below is used as the namespace for each class in the project.

```
dotnet new <Callback Template ShortName> -n <ProjectName>
```

For example;

```
dotnet new pricingbasepricecallback -n SamplePricingBasePriceCallback
```

7. Go to the directory in which your csproj file is created with the command:


```
cd <ProjectName>
```

For example:

```
cd SamplePricingBasePriceCallback
```

8. Update the template code as needed and then build your project using the command:

```
dotnet build
```

 If you get an error related to a PowerShell file, then get the execution policy by running the command:


```
Get-ExecutionPolicy
```

If this returns a `restricted` execution policy, run the following command to update it.

```
Set-ExecutionPolicy remotesigned
```

The project is built and the `<ProjectName>.zip` file is created at the project location.

Perform these steps once to create the Callback or ServiceHook custom code project. Afterward, your team can start working on specific features by creating feature branches. You can use Conga helpers to easily integrate features like data access, telemetry, etc., into custom code.

 Please get in touch with Conga Support for helper details.

When the feature development is finished, team members must commit changes to their feature branch and then submit a pull request to a relevant branch, like "dev". Once the responsible owner approves and merges the pull request after a custom code review, the continuous integration (CI) pipeline kicks in automatically. The pipeline generates a build artifact on success.

i To create custom code using Visual Studio 2022 Code Community, follow steps 1 to 5, and once project is created, open it in Visual Studio 2022 Code Community to build it. NuGet templates callback are compatible with .NET 6 and work with .NET 6.0 target framework.

To update the NuGet version



1. Open Visual Studio Code.
2. Go to Menu > View, and select **Terminal** from the list, or press **Ctrl + `** (backtick) on your keyboard.
3. Use the following commands to update the NuGet templates in your project with an appropriate version. This is an example command with sample versions, Replace the version numbers with the latest available versions to use all recent updates. Please get in touch with Conga Support for more details about the list of default NuGet templates provided by Conga.

| Packages |
|--|
| dotnet add package Conga.Platform.Extensibility.Library --version 202311.1.0.38 |
| dotnet add package Conga.Revenue.Common.Callback --version 22023.12.0.2 |
| dotnet add package Conga.Approvals.Common.Callback --version 2023.3.0.2 |
| dotnet add package Conga.Contracts.Common.Callback --version 2023.11.0.2 |

Managing Trusted APIs

You must add external APIs as trusted APIs in the Conga Revenue Lifecycle Cloud to use API calls from custom code. This section describes the steps for adding a trusted API.

To add a trusted API

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner, then go to Admin Console > Custom Code.
3. Click the More () icon.

4. Select Trusted APIs and click **New**.

New Trusted API

* Name

* Endpoint

Allowed Http Verbs

Get X
Post X
▼

Cancel
Save

5. Enter or select values for the following fields:

| Field | Description |
|--------------------|--|
| Name | Enter the API name. |
| Endpoint | Enter the external API base URL that you want to call from custom code. |
| Allowed Http Verbs | Select the CRUD operation to perform by calling the external API endpoint through custom code. |

6. Click **Save**. A confirmation message appears.



The trusted API is now available in the Trusted API list, allowing you to edit or delete it.

Managing Trusted Objects

To perform CRUD operations on out-of-the-box (OOTB) objects in the Conga Revenue Lifecycle Cloud, you must designate them as trusted objects. This enables their use with DataHelper for executing custom code. This section describes adding OOTB objects as trusted objects.

To add a trusted object

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

2. Click the App Launcher () icon from the top-left corner, then go to Admin Console > Custom Code.
3. Click the More () icon.
4. Select Trusted Objects and click **New**.
5. Enter an object name and select values for the Allowed Operations field.

New Trusted Object

* Object Name

Allowed Operations

Create X
Read X
▼

Cancel
Save


| Field | Description |
|--------------------|--|
| Object Name | Enter the OOTB object name. As you type, the application will display a list of objects corresponding to your keyword. |
| Allowed Operations | Select the CRUD operation (HTTP verbs) to perform on the OOTB object through custom code. |

6. Click **Save**. A confirmation message appears.

The trusted object is now available in the Trusted Objects list, allowing you to edit or delete it.

Templates

This table lists currently provided templates. It consists of blank, callback, and service hook templates. Template ShortName is primarily used for creating a project for a specific type.

 Please get in touch with Conga Support for more details about the list of default NuGet templates provided by Conga.

| Template Type | Template ShortName | Category |
|---------------|--------------------|----------|
| | | |

| | | |
|-------------------------------|------------------------------|-------------------------------|
| – | blank | Blank |
| ServiceHook | servicehook | Servicehook |
| PricingBasePrice Callback | pricingbasepricecallback | IPricingBasePriceCallback |
| PricingTotalling Callback | pricingtotallingcallback | IPricingTotallingCallback |
| ProductFilter Callback | productfiltercallback | IProductFilterCallback |
| RelatedPricing Callback | relatedpricingcallback | IRelatedPricingCallback |
| ProcessEmailTemplate Callback | processemailtemplatecallback | IProcessEmailTemplateCallback |
| RuleBasedSubmit Callback | rulebasedsubmitcallback | IRuleBasedSubmitCallback |
| ProductConfiguration Callback | productconfigurationcallback | IProductConfigurationCallback |
| Validation Callback | validationcallback | IValidationCallback |
| DisplayAction Callback | displayactioncallback | IDisplayActionCallback |
| CartLifecycle Callback | cartlifecylecallback | ICartLifecycleCallback |
| ContractLifecycle Callback | contractlifecylecallback | IContractLifecycleCallback |
| Asset Callback | assetcallback | IAssetCallback |
| Config Callback | configcallback | IConfigCallback |

.NET Class Library Usage

This table lists the types that are not allowed from the .NET 5 base library for custom code development.


| | Types |
|---|----------------------------|
| 1 | System.Net.Http.HttpClient |

| | Types |
|----|---|
| 2 | System.IO.File |
| 3 | System.IO.StreamReader |
| 4 | System.IO.StreamWriter |
| 5 | System.IO.FileStream |
| 6 | System.IO.BinaryReader |
| 7 | System.IO.BinaryWriter |
| 8 | System.IO.Directory |
| 9 | System.IO.DirectoryInfo |
| 10 | System.Environment |
| 11 | System.Reflection.Assembly |
| 12 | System.Activator |
| 13 | System.Diagnostics.Process |
| 14 | System.Net.WebUtility |
| 15 | System.Reflection.MethodBody |
| 16 | System.Reflection.Pointer |
| 17 | System.Security.PermissionSet |
| 18 | System.Security.SecurityElement |
| 19 | System.Security.SecurityRulesAttribute |
| 20 | System.Security.SecuritySafeCriticalAttribute |

| | Types |
|----|---|
| 21 | System.Security.SecurityTreatAsSafeAttribute |
| 22 | System.Security.SecurityTransparentAttribute |
| 23 | System.Security.SuppressUnmanagedCodeSecurityAttribute |
| 24 | System.Security.UnverifiableCodeAttribute |
| 25 | System.Security.Permissions.CodeAccessSecurityAttribute |
| 26 | System.Security.Permissions.SecurityAttribute |
| 27 | System.Security.Permissions.SecurityPermissionAttribute |
| 28 | System.Runtime.Serialization.FormatterServices |
| 29 | System.Net.Http.DelegatingHandler |
| 30 | System.Net.Http.HttpClientHandler |
| 31 | System.Net.Http.HttpMessageHandler |
| 32 | System.Net.Http.HttpMessageInvoker |
| 33 | System.Net.Http.HttpRequestOptions |
| 34 | System.Net.Http.HttpRequestMessage |
| 35 | System.Net.Http.MessageProcessingHandler |
| 36 | System.Net.Http.SocketsHttpConnectionContext |
| 37 | System.Net.Http.SocketsHttpHandler |
| 38 | System.Net.Http.SocketsHttpPlaintextStreamFilterContext |

Deploying a Custom Code Project

Once code review is completed and pull requests are merged into the main, staging, or development branch, the Bitbucket CI pipeline generates a build artifact containing custom code. This section provides the steps to deploy this custom code project to a Conga RLC development, test, or staging environment using custom code APIs.

 Once you have confirmed the code is ready to deploy on the production environment, raise a ticket to the Conga CloudOps team. In the ticket, provide the package name and version that you intend to deploy.

Prerequisites

A Bitbucket repository is configured. For more details, see [Configuring a Bitbucket Repository with Conga Platform](#).

To deploy custom codes to Conga RLC

1. Log in to Bitbucket and go to the target repository.
2. Go to the sidebar menu and click **Download**. The list of build artifact packages, along with their versions, is displayed.
3. Use these APIs as needed:

| Action | API Endpoint |
|---|---|
| <p>Get deployment artifact packages</p> | <p>Fetches a list of deployment packages that are yet to be deployed.</p> <p>GET <base-address>/api/extensibility/v1/deployment/packages</p> <div data-bbox="707 555 1428 640" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Sample response</p> </div> <pre data-bbox="707 640 1428 1339"> { "Success": true, "Data": [{ "PackageName": "repositoryname__branchname__2", "ImportedOn": "2023-08-04T01:51:42" }, { "PackageName": "repositoryname__branchname__1", "ImportedOn": "2023-08-02T13:33:02" }], "StatusCode": "OK" } </pre> |

| Action | API Endpoint |
|-----------------------|---|
| <p>Deploy package</p> | <p>Deploys the package asynchronously. Package may contain CustomCode, Configuration, and Schema.</p> <p>GET <base-address>/api/extensibility/v1/deployment/package/deploy</p> <p>Sample build artifact package name: democustomer-pipeline-test__master__1</p> <div data-bbox="707 647 1426 734" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Sample Payload</p> </div> <pre data-bbox="707 734 1426 952"> { "PackageName": "democustomer-pipeline-test__master__1" } </pre> <div data-bbox="707 981 1426 1068" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Sample Response</p> </div> <pre data-bbox="707 1068 1426 1518"> { "Success": true, "Data": { "PackageName": "democustomer-pipeline-test__master__1", "DeploymentId": "f7994a15-df7f-41d6-aef8-9977c2fddd35" }, "StatusCode": "Created" } </pre> |

| Action | API Endpoint |
|--|---|
| <p>Track package deployment status</p> | <p>Gets the status of the package and any available resource for the given deployment ID.</p> <pre>GET <base-address>/api/extensibility/v1/deployment/{deploymentId}/status</pre> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Sample success response</p> <pre>{ "Success": true, "Data": { "Name": "package-name", "Status": "InProgress", "DeploymentId": "deployment-id", "ProjectStatus": [{ "ResourceName": "custom-code-1", "ResourceType": null, "Status": "InProgress" } { "ResourceName": "custom-code-2", "ResourceType": null, "Status": "InProgress" }] }, "StatusCode": "OK" }</pre> </div> |
| <p>Get package deployment log</p> | <p>Retrieves the package deployment logs for the given deployment ID.</p> <pre>GET <base-address>/api/extensibility/v1/deployment/{deploymentId}/logs</pre> |

| Action | API Endpoint |
|----------------|--|
| Fetch log data | <p>Retrieves the worker logs for the given deployment ID.</p> <pre>POST <base-address>/api/telemetry/v1/logs/start-time/{startTime}/end-time/{endTime}</pre> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Sample payload</p> <pre>{ "CustomCodeDeploymentId": "f7994a15- df7f-41d6-aef8-9977c2fddd35", }</pre> </div> |

Custom code is accessible from the custom code user interface. For more details about accessing, downloading or deleting custom code, see [Working with Custom Code via User Interface](#).

i We recommend using the Custom Code API for deployment, though you can upload a single custom code project using the Import feature. For more details, see [Importing Custom Code](#).

Importing Custom Code

This section describes importing a custom code project through the custom code interface. Only one custom code project can be imported at a time.


i We recommend using the Custom Code APIs for the custom code project deployment. For more details, see [Deploying a Custom Code Project](#).

Prerequisite

You have prepared a custom code project zip file. To learn more about custom code development, see [Developing Custom Code](#).

To import custom code to Conga RLC

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

2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Custom Code.
3. Click **Import**. The Import Custom Code popup appears.
4. Enter or select values for the following fields:

| Field | Description |
|----------------------|--|
| Name | Enter a unique name for your custom code. |
| Description | Enter a description for your custom code. |
| Custom Code Zip File | Select the project zip file to import. Click Choose File and select the custom code project zip file from your file system. |


5. Click **Save**.


Custom code is accessible from the custom code user interface. For more details about accessing, downloading, or deleting custom code, see [Working with Custom Code through the User Interface](#).

Working with Custom Code through the User Interface

After deploying a custom code project using either the API or Import feature, you can manage it from the Custom Code listing page. This section describes steps for viewing, downloading, and deleting custom code.

To view custom code information

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Custom Code. The Custom Code list page appears.
3. Click the **Name** link from the Custom Code List page. The code explorer opens the project in read-only mode.

 The **Enable Call Stack Line No** toggle is useful to get error information during debugging. When activated, it provides the line number where an exception originates.

To download custom code

1. Go to the Custom Code listing page.
2. Click the More (⋮) icon at the start of the user record.
3. Click **Download**. A confirmation message appears.

The project is exported as a .zip file.

To delete custom code

1. Go to the Custom Code listing page.
2. Click the More (⋮) icon at the start of the user record.
3. Click **Delete**. A confirmation popup appears.
4. Click **Yes, Delete**. A confirmation message appears.

You cannot delete a custom code project if it is mapped to a service hook, callback or custom API resource.

Developing Custom Code API


When you need to create, read, update, or delete (CRUD) a custom object with complex validation not supported by Conga RLC's default features, you can use custom code as an API feature. This allows you to implement CRUD operations with the necessary validation logic and expose these custom code methods as API endpoints.

The Resources option allows API service (Resource URI) creation for the developed custom code. This section describes how to expose a method as an API endpoint by creating resources, resource URIs, and mappings with custom code.

Prerequisites

- A custom code project for use as an API service is deployed to Conga RLC.
- The method is public and stored within a public class.
- The model used as a method parameter is a Plain Old CLR Object (POCO) class.
- A custom object to be used in the custom code has been created. For more details about creating a custom object, see [Managing Application Schemas](#).
- An object permission for the custom object has been defined. For more details, see [Managing Roles and Permission Groups](#).

To create a resource and resource URI

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Custom Code > Resources.
3. Click **New**. The Create Resource popup appears.
4. Enter the resource name and click **Create**. The resource is added to the Resources list. Now you must create URL path mapping entries for methods defined in the custom code that you want to expose.
5. Click the Resource Name link, and then click **New**.
6. The Create Resource URI screen appears.

The screenshot shows the 'Create Resource URI' form with the following fields and values:

- * Http Verb:** Get
- Route:** /id/getaccount
- * CustomCode Name:** CustomAccount
- * Class Name:** AccountController
- * Method Name:** Get
- Parameter Information:** Uri Path: id

Enter values in the following fields.

| | |
|-----------------|---|
| Http Verb | Select a verb to apply to the method. |
| Route | Enter the route to the API method. This directs incoming API requests to backend resources. |
| CustomCode Name | Search and select the custom code project. |
| Class Name | Search and select the class name where the method you will expose is stored. |
| Method Name | Search and select the method name to expose. |

| | |
|-----------------------|--|
| Parameter Information | <p>Select any of the following source types and enter a source name for that source type:</p> <ul style="list-style-type: none"> • Request Body A source name is not required for a request body parameter type. • Uri Path • Query String <p>Use the plus (+) icon to add multiple parameters.</p> |
|-----------------------|--|


7. Click **Save** to exit, or click **Save & New** to store your entry and create a new one.

A new resource URI is accessible from the Resources URI user interface, and you can validate the API behavior using an HTTP client tool like Postman.

Custom API URIs are created in this format: `https://<base-url>/api/custom-api/v1/<resource name>/<route>`.

Mapping Custom Code


After deploying your custom code onto Conga RLC, you must link it with a product-specific callback. This callback enables you to expand the product's API functions using your custom code. The Custom Code Mapping interface lets you connect your business logic with the product's callback using C# code (custom code project).

 The current interface supports callbacks for Revenue, Contracts, and Approvals products.

Prerequisite

A custom code is deployed onto Conga RLC.

To map a custom code project with a callback

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner then go to Admin Console > Custom Code.
3. Click **Custom Code Mappings**.
4. Select the Product Name from the list to view its callbacks. The list of callbacks appears.

5. Go to a callback and select a custom code project name and its corresponding class name.
6. Click **Save**. A confirmation message appears.

Now, create a service hook to define data change rules for executing your custom code. For more details, see [Managing Service Hooks](#).


Managing Service Hooks

After deploying to Conga RLC a custom code project with business logic to be executed on a data change event, you must set a mechanism to execute the custom code. Service hooks allow you to define data change rules to execute any custom code for a given object. Data change rules are like post-action triggers that can be configured in events like creating, updating, or deleting a record for a given object. This section describes the steps for creating a service hook.

Prerequisite

Custom code is deployed onto Conga RLC and mapped with Callback.

To create a service hook

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Admin Console > Service Hooks.
3. Click **New**.
4. Enter values in the following fields.

| Fields | Description |
|-------------|---|
| Name | Enter a name for the service hook. |
| Event Types | Select the event to trigger the service hook on: create, update, or delete. |
| Object Name | Search and select the object name for the event to happen with. |
| Condition | Specify the condition you want the selected object to meet to trigger the service hook. |


| Fields | Description |
|--------------|--|
| Project Name | Enter the name of the custom code project to execute when a service hook is triggered. |
| Class Name | Enter the name of the class where your desired custom code method is stored. |
| Is Active | Enable this toggle to activate the service hook. |


5. Click **Save** to exit, or click **Save & New** to save your entry and create a new one.

The newly created service hook entry is now available on the Service Hooks listing page. You can edit or delete service hooks directly from this page.

Reporting and Dashboards


The Reports & Dashboards section offers pre-defined reports and dashboards customized for Conga CLM customers. Currently, there are four reports designed for Conga CLM users, and the record displayed under report and dashboard are specific to the tenant. Only users allowed by the product administrator can access this module. To learn more about Conga CLM reports, see Reports and Dashboard in Conga *CLM for Users guide*.

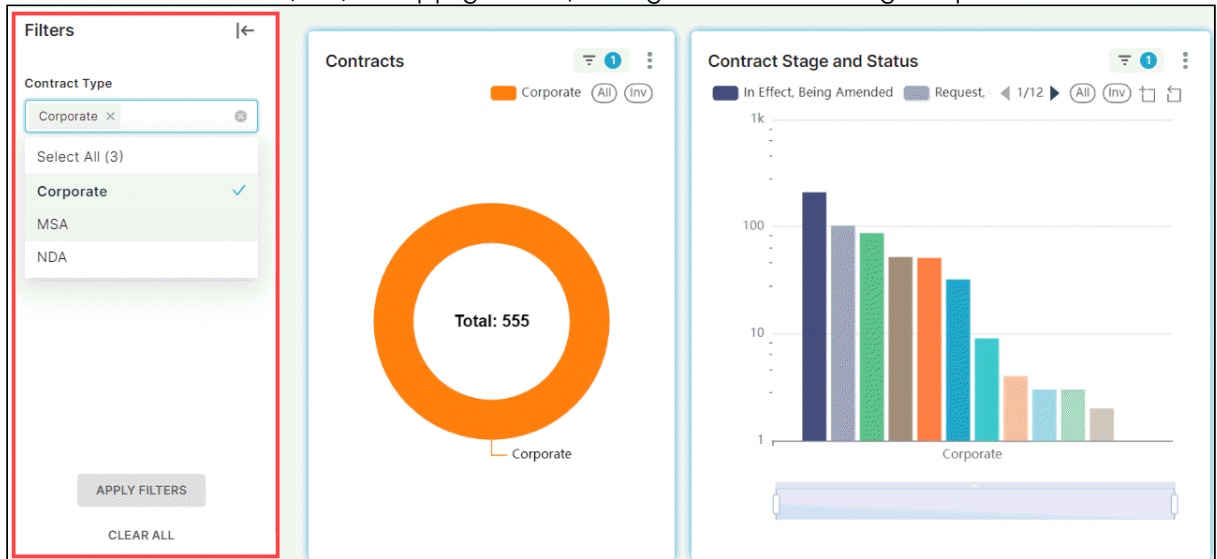
To access, click App Launcher () icon, go to Shared Apps, and then select Reports & Dashboards.

 To ensure reporting data is available, you must perform a one-time migration for existing tenant data. Enable the **Enable One-Time Migration for Reporting** toggle in the organization details. For more information, see [Viewing Conga Org Details](#). After enabling, please wait for the setup to complete. Use the Refresh button to check the status of the data migration. If any issues arise, use the Retry button to try the migration again.

| Shared Apps | | |
|--|-------------|--------------------|
| Reports & Dashboards | | Refresh |
| <input type="text" value="Search this list"/> | | |
| Report Name | Created By | Date Modified |
| Contract Clause Report | Conga Admin | 5/29/2024 11:59 AM |
| Contracts with Non-standard Legal Language | Conga Admin | 5/28/2024 7:09 PM |
| Contract by Type/Stage | Conga Admin | 5/28/2024 7:09 PM |
| Contract Expiration - Year/Quarter/Month | Conga Admin | 5/28/2024 7:09 PM |

Clicking the report name link opens its dedicated dashboard. Within the dashboard, you have the flexibility to:

- **Apply Filters:** Apply filters to specific fields for refining your data view within the report. For example, to view Corporate records, click the Contract by Type/Stage link, select the filter icon () to apply filters, and you can view only Corporate records.



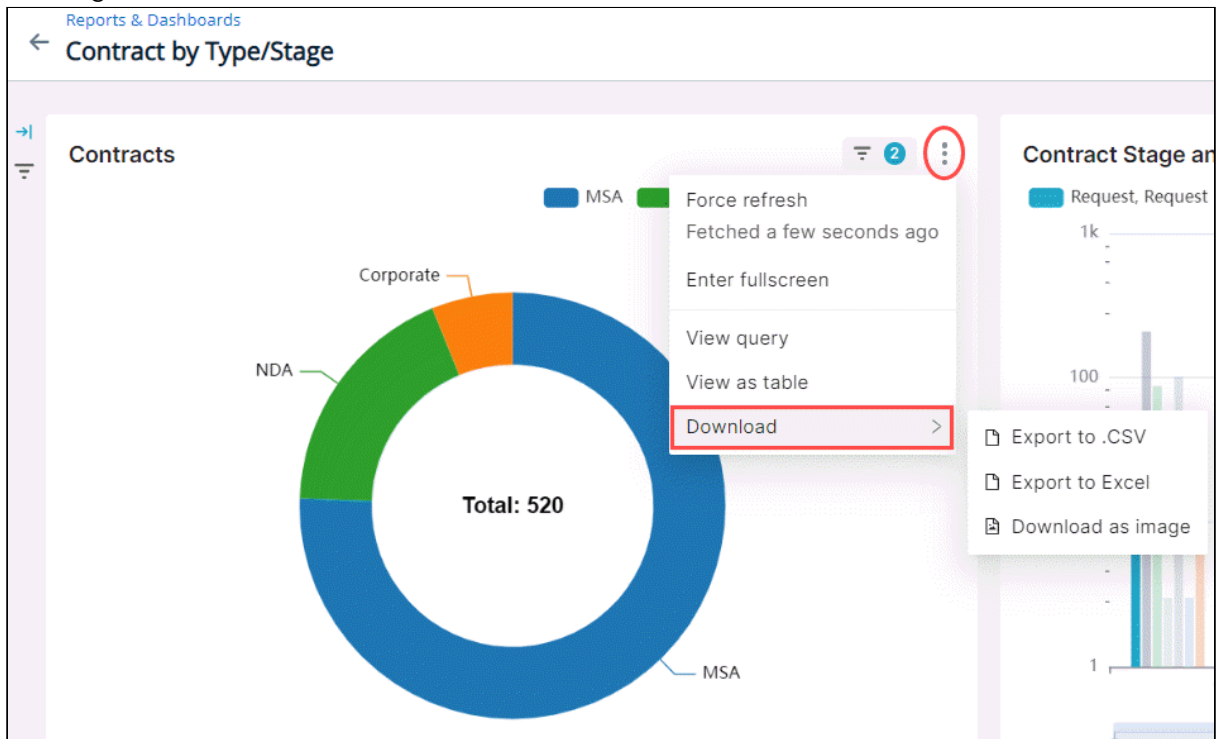
- **Sort Data:** Sort any available column and organize the dashboard information. You can choose between a table or list view.

Contract Clause Report

Show entries Search

| Contract Name | Record Type | Action | Clause Name | Clause | Contract Start Date | Total Contract Value |
|---------------|-------------|-----------|-------------|---------------------|---------------------|----------------------|
| Versioning | Corporate | Action-22 | Clause-22 | Some Clause Info-22 | 2024-03-15 | 12000 |
| Versioning | Corporate | Action-19 | Clause-19 | Some Clause Info-19 | 2024-03-15 | 12000 |
| Versioning | Corporate | Action-18 | Clause-18 | Some Clause Info-18 | 2024-03-15 | 12000 |
| Versioning | Corporate | Action-17 | Clause-17 | Some Clause Info-17 | 2024-03-15 | 12000 |
| Versioning | Corporate | Action-16 | Clause-16 | Some Clause Info-16 | 2024-03-15 | 12000 |
| Versioning | Corporate | Action-15 | Clause-15 | Some Clause Info-15 | 2024-03-15 | 12000 |

- **Download:** Export the report data in various formats, such as JPEG (image), XLSX (Excel spreadsheet), or CSV (comma-separated values), for further analysis or sharing.



- **Search data:** Search for specific data in a report

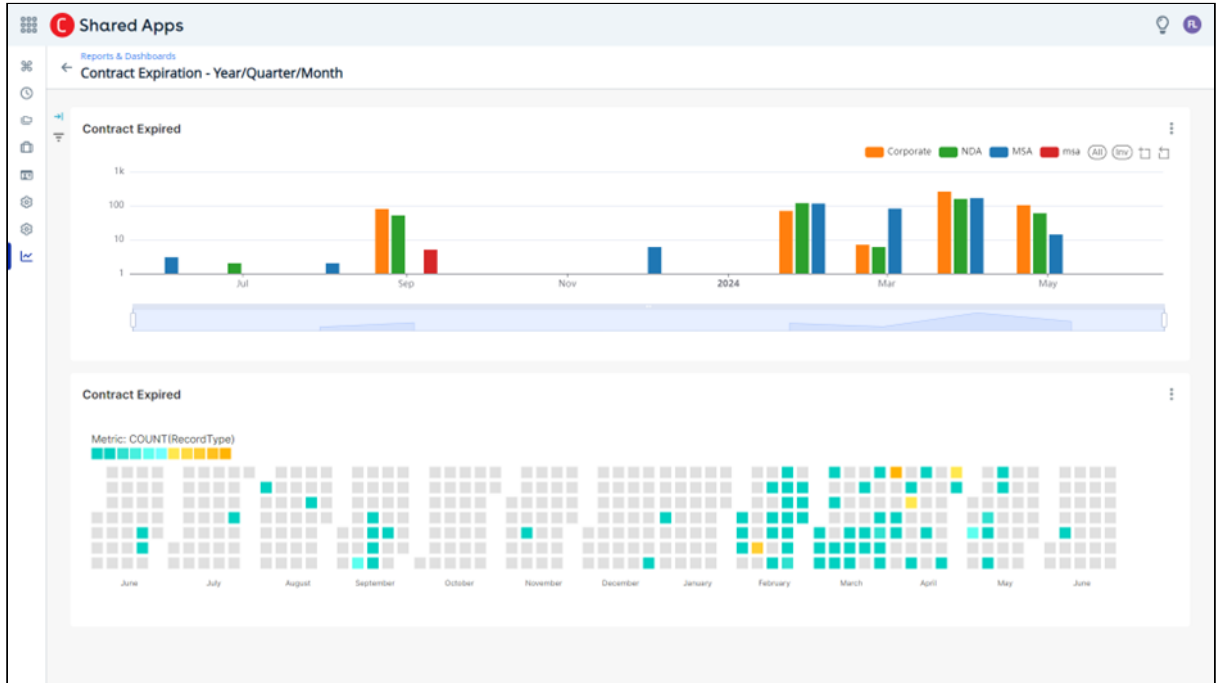
Reports & Dashboards

← **Contract Clause Report**

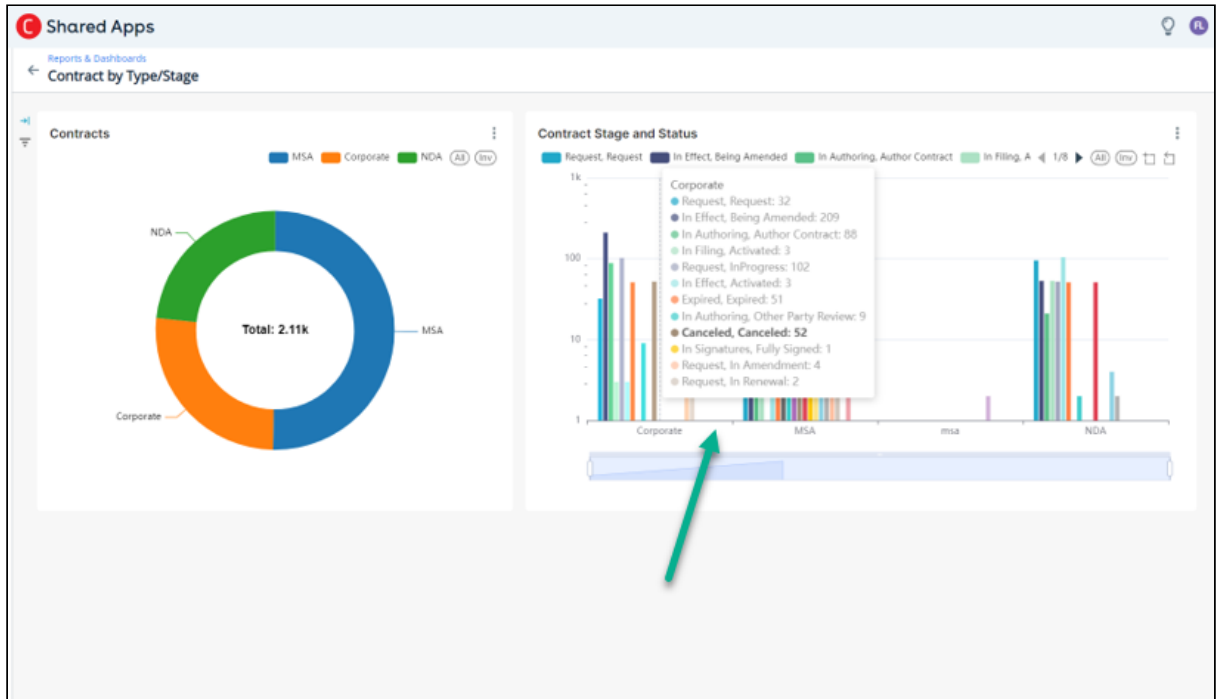
Show entries Search

| Contract Name | Record Type | Action | Clause Name | Clause | Contract Start Date | Total Contract Value |
|-------------------|-------------|--------------|-------------|---------------------|---------------------|----------------------|
| workflow test_002 | MSA | Action-sz-02 | Clause-02 | Some Clause Info-02 | N/A | 2000 |
| workflow test_002 | MSA | Action-sz-03 | Clause-03 | Some Clause Info-03 | N/A | 2000 |
| workflow test_002 | MSA | Action-sz-04 | Clause-04 | Some Clause Info-04 | N/A | 2000 |
| workflow test_002 | MSA | Action-sz-05 | Clause-05 | Some Clause Info-05 | N/A | 2000 |
| workflow test_002 | MSA | Action-sz-06 | Clause-06 | Some Clause Info-06 | N/A | 2000 |

- **Display charts:** Different charts (Pie, Bar, Line, Histogram, Funnel, Scatterplot, Summaries) are displayed that graphically show your custom report data.



Hover your mouse over a chart to display the details.




CX Studio

CX (customer experience) Studio is a low-code/no-code module that makes it simple for users of all experience levels to create and edit pages, layouts, and applications. CX Studio's user-friendly interface and simple drag-and-drop features enable non-

programmers to create powerful solutions that meet their objectives, increasing efficiency and productivity in a range of business operations.

Overview of the CX Studio UI

To open CX Studio, navigate to the App Launcher () icon from the top left corner > Apps > CX Studio. By default, a list of pages is displayed.

| Feature | Description |
|----------------|--|
| Pages | Allows creating custom pages without writing any code. For example, if you want to create a list page with user data, account data, or custom object data, you can do so by selecting the entity and dragging a grid into your page. You can also connect different custom or non-custom pages using custom actions at the top of the page. |
| Object Layouts | Allows creating templates or layouts that can be reused to create multiple pages. For example, if you want five pages with the same layout, you can create the layout in CX Studio, save it, and use it for any number of pages. Custom actions can be added to these layouts. Additionally, admins can edit the layout on the go using CX Studio Lite while opening any of the pages. |

Examples of Using CX Studio's Key Features

The table below provides examples of how to use some of the key features of CX Studio:

| Category | Use case description |
|---------------------------------|---|
| Validation and visibility rules | Configure validation rules for contracts: <ul style="list-style-type: none"> • If a user enters a currency value, they must select a currency type, or the system displays an error message. • For contracts with the agreement type "MSA," display the "Additional Information" section. |

| Category | Use case description |
|--|---|
| User role and record type based layout | Configure and assign different layouts based on user roles and record types. <ul style="list-style-type: none"> • Sales users view only the "Basic" section, not the "Terms and Renewals" section. • Contract Managers view both the "Basic Information" and "Terms and Renewals" sections. |
| Custom actions on pages | Add a custom action to validate contracts. When action button is clicked, trigger a workflow that assigns the current logged-in user as the owner if the owner field is empty. |

Key Features:

- No-Code/Low-Code Solution: Customize applications, create custom pages, and modify layouts with minimal coding skills. Utilize out-of-the-box templates and a drag-and-drop interface for quick and efficient design.
- Role-Based Layouts: Create dynamic custom pages that provide personalized views of records based on the roles and permissions of the logged-in user.
- Form Builder: Enhance data collection processes with a user-friendly drag-and-drop interface, improving overall efficiency in sales and marketing operations.


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

- [Creating Pages](#)
- [Creating Object Layouts](#)
- [CX Studio Lite: Managing Page Layout](#)

Creating Pages

You can create a new page layout, such as a listing or detail page, using the default template. You can also define actions for the page header, such as navigating to another page, executing a workflow, or running custom code API. You can access the new page through a separate application or page, based on the actions and access privileges configured by the administrator. This section describes how to create a new page using the default template layout.

To create a new page

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner then go to Apps > CX Studio.
3. Click **New Page**, select Blank from the Template List, and then click **Next**. The New Page screen appears.
4. Enter or select values for the following fields:

| Field | Description |
|-----------------|---|
| Name | Enter a unique name for your page. |
| Action Provider | <p>Select an action provider from a list. Based on your selection, the system presents custom action options to add as an action button in the page header. The Generic Provider option is available by default.</p> <p>You can add new action providers according to your requirements. Please get in touch with Conga Support to add a new action provider.</p> |
| Data Provider | <p>Select a data provider from a list. Based on your selection, the system displays information in the page you create. The Generic Provider option is available by default. Select Generic Provider option to display data from Conga RLP's out-of-the-box (OOTB) entity's data.</p> <p>You can add new data provider according to your requirements. Please get in touch with Conga Support to add a new action provider.</p> |
| Entity | <p>Search and select the entity you want to associate with your page. As you type, the application will display a list of entities corresponding to your keyword.</p> <p>For example, search for the User entity to create a list page with user data.</p> |
| Description | Enter a description for your page. |

5. Click **Create**. The Properties popup appears.
 - In the page header, you can add action buttons to perform operations such as navigating, triggering a workflow, or executing custom code. To learn more about actions, see [Adding Actions to Page Header](#).

- For the content, you can use different widgets like Card, Data Grid, or Details View to set the main page layout. Depending on the selected widget, the system offers options to further customize the page's appearance. To learn more about controlling layout, properties and it's characteristics, see [CX Studio Lite: Managing Page Layout](#).

6. Click **Publish**. Your page is created successfully.

You can now access newly created page from the Page Listing page. To access a page from another page, set the page URL in the page header action of the source page. For more details on how to add actions to a page header, see [Adding Actions to Page Header](#).

Creating Object Layouts



The Object Layouts feature allows you to create dynamic custom pages, such as detail pages, list pages, master details, and forms for specific applications like CLM, CPQ, etc. You can drill down to entity type and record type, and provide personalized views of records based on the roles and permissions of the logged-in user. This section explains how to create a dynamic custom layout for a specific object.

For example, Configure and assign different layouts based on user roles and record types. Sales users can view only the "Basic" section, not the "Terms and Renewals" section and Contract Managers can view both the "Basic Information" and "Terms and Renewals" sections.


To create a dynamic custom page

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner then go to Apps > CX Studio > Object Layouts.
3. Click **New**. The Object Layout screen appears.
4. Enter or select values for the following fields:

| Field | Description |
|------------------|---|
| Application Name | Select the application for which you want to create an object layout. |

| Field | Description |
|-------------|--|
| Page Type | <p>Select the page type you want to customize:</p> <ul style="list-style-type: none"> • Detail: A detail page layout • List: A list page layout • Master Detail: A detail page with related items • Create: An entry form layout |
| Entity Type | <p>Search for and select the object you want to customize the layout for. As you type, a list of matching objects will appear.</p> <p>For example, search for the "User" object to create a list page with user data.</p> |
| Record Type | <p>Search for and select a record type from the list. The system will display a record type based on the object you choose in the Entity Type. Note that not every entity type requires you to select a record type.</p> <p>For example, for the Agreement entity type, options such as MSA, NDA, Corporate, etc., are displayed.</p> |
| Variant | <p>Enter "config".</p> |
| Owner Type | <p>Select the owner type to personalize the object layout view:</p> <ul style="list-style-type: none"> • None: Select none to create a dynamic page accessible to all users. • User: Select user to create a dynamic page for a specific user. • Role: Select role to create a dynamic page for a group of users based on their roles. <div data-bbox="336 1429 1426 1556" style="border: 1px solid #f0e68c; padding: 10px;"> <p> The application prioritizes the User setting when two similar object layouts exist—one with the Owner Type set to User and the other to Role.</p> </div> |
| Owner | <p>Search for the user or select a role name to create a personalized page view experience for users assigned to that role.</p> <div data-bbox="336 1697 1426 1825" style="border: 1px solid #c0c0c0; padding: 10px;"> <p> If you leave the owner field blank, the layout defaults to public and all users can access it, regardless of the selected owner type</p> </div> |


5. Click **Save**. A success message appears and your dynamic custom page is successfully created. A newly created object layout is now available on the object layouts listing.

6. From the Object Layouts listing, click the More () icon, and then select **Edit**. The properties window appears.
 - In the page header, you can add action buttons to perform operations such as navigating, validating, or executing custom code. To learn more about actions, see [Adding Actions to Page Header](#).
 - For the content, the system offers options to further customization on sections, fields, and their properties. To learn more about controlling layout, properties and it's characteristics, see [CX Studio Lite: Managing Page Layout](#).


Managing Object Layout

After you create a object layout, you can view, edit, clone, delete, and edit metadata from the Object Layouts list page. This section explains how to modify an existing object layout, create a copy of an object layout, remove an object layout, and make advanced changes to the object layout metadata using the JSON Editor—changes that cannot be made through the user interface.

To edit object layout


1. Click the More () icon at the start of the object layout record.
2. Click **Edit**. The layout page appears in edit mode.
3. Make the necessary changes.
4. Click **Publish**. A confirmation message appears.

To clone object layout

1. Click the More () icon at the start of the object layout record.
2. Click **Clone**. The Clone Layout popup appears, with fields pre-filled from the source layout.
3. Modify the existing field values as needed.
4. Click **Save**. A confirmation message appears.

Access the newly cloned object layout from the Object Layouts listing page.

To edit object layout metadata

1. Click the More () icon at the start of the object layout record.
2. Select **Edit Metadata**. The JSON Editor opens and displays the object layout code in JSON format.

3. Edit the JSON code as needed. Use the Beautify option to format the code to standard.
4. Click **Save**. A confirmation message appears.


Example: You can add actions to the header of the grid page using the default user interface. However, actions cannot be added above the Grid List. To address this limitation, use the Edit Metadata feature to add custom actions to the Grid View page.

To delete object layout

1. Click the More (⋮) icon at the start of the object layout record.
2. Select **Delete**. The Delete Object Layout popup appears.
3. Click Submit. A confirmation message appears.

CX Studio Lite: Managing Page Layout

The CX Studio Lite is a powerful tool that allows you to customize the appearance and functionality of listing pages, 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.

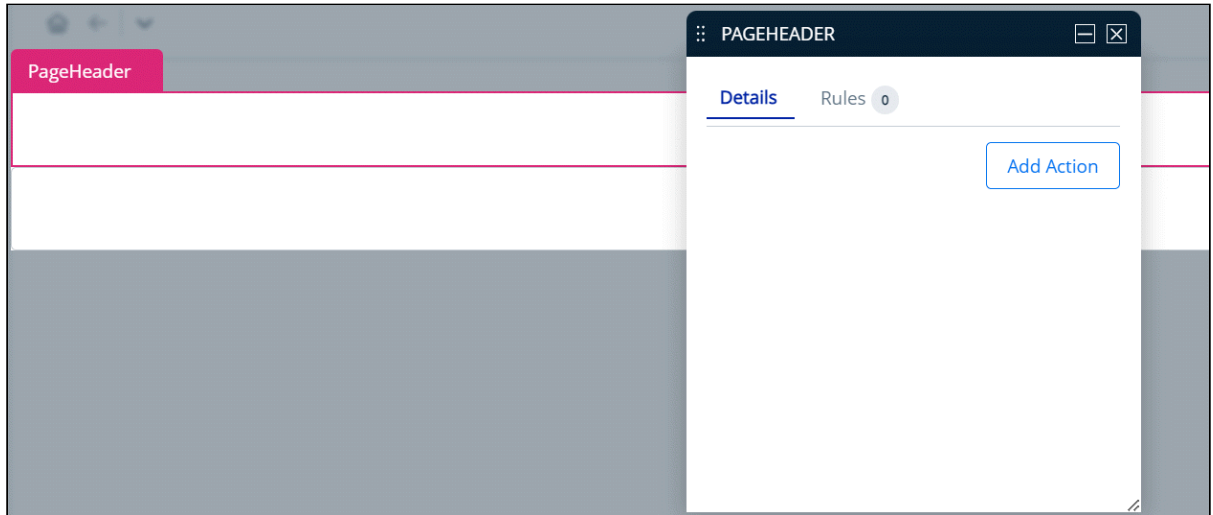
Key features of the Page Layout Editor:

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 CX Studio Lite enables you to manage these related lists, including which related entities are displayed and the ordering of the lists.
4. **Define Rules for Individual Actions and Fields:** Define rules for action, section and field within a record. Like you can control which fields are visible, editable, or required when viewing or editing a specific record.

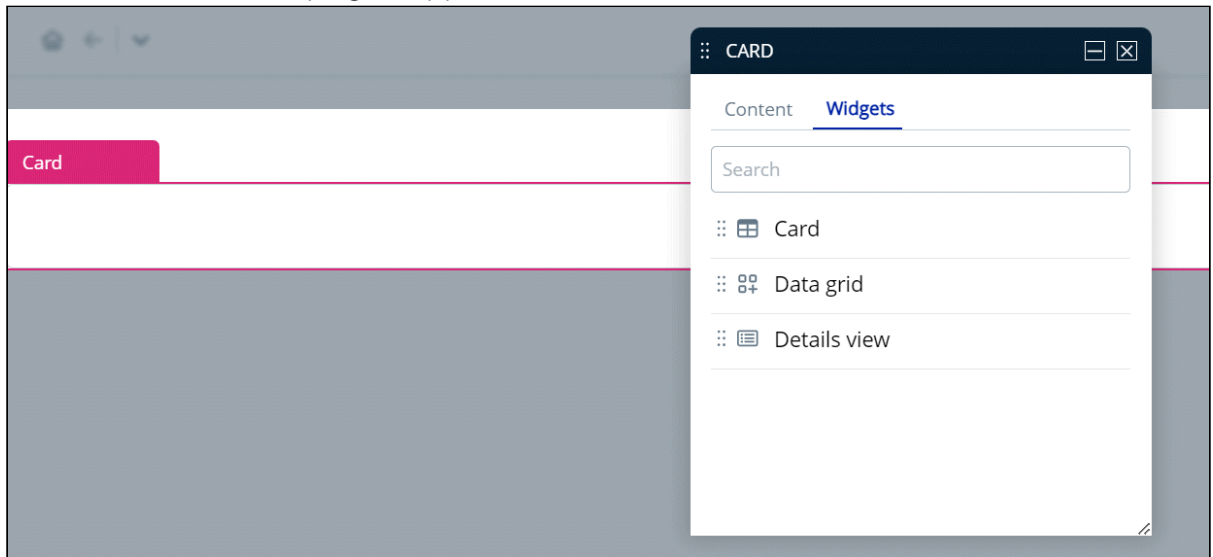
CX Studio Lite UI Overview

The CX Studio Lite user interface has two main areas:

1. **Page Header:** Allows adding customized actions in the page header as well as defining rule based on user role.



2. **CARD:** Allows using different widgets like Card, Data Grid, or Details View to set the main page layout. Depending on the selected widget, the system offers options to further customize the page's appearance.



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



- [Managing Data Grid View](#)
- [Managing Content Details View](#)

- [Adding Actions to Page Header](#)
- [Applying Rules](#)
- [Cloning Standard Actions](#)

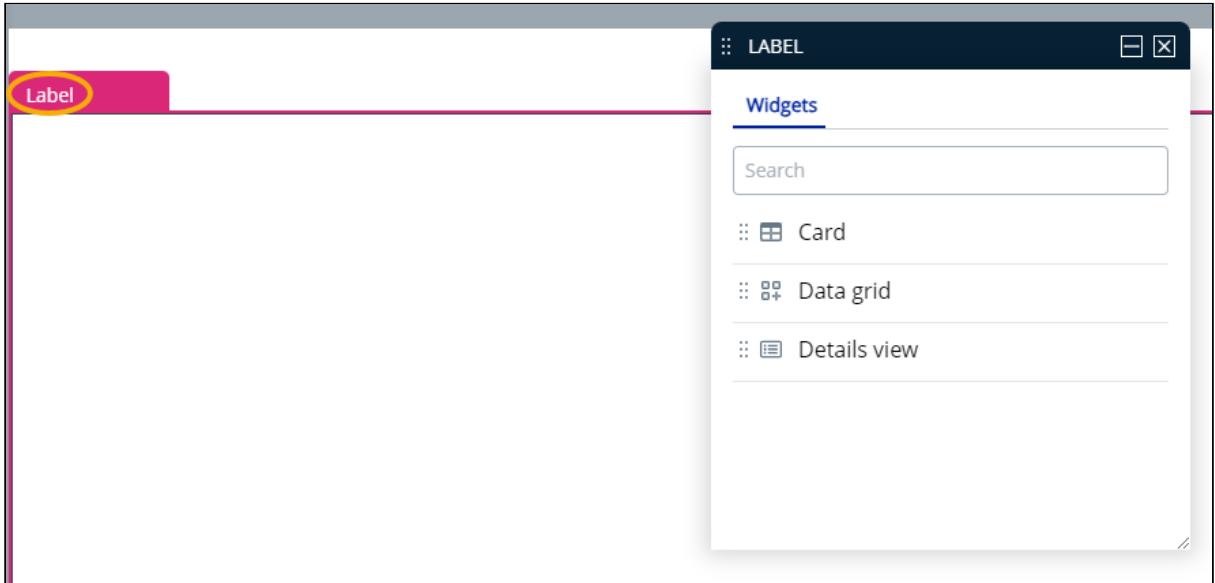
Managing Data Grid View

You can create a customized Data 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. This section describes managing a data grid view page layout.

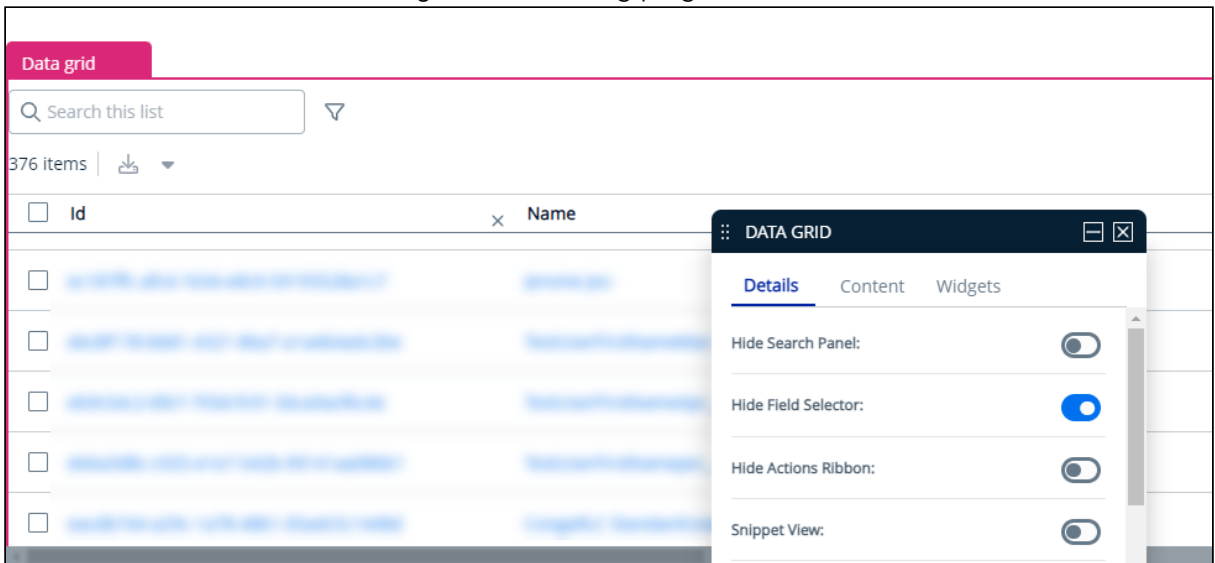
To manage a grid view layout

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner then go to Apps > CX Studio.
3. Open the page or object layout properties in which you want to add or update the grid view properties. You can open the page properties window in the following ways:
 - While Creating a New Page: Pages > New Page > select a template > Next > fill in details > Next.
 - While updating an Existing Page: Pages > click page name link.
 - While updating an Object Layout: Object Layouts > click the More () icon > Edit.
 - Editing a Page from RLP or a Supported Application (e.g., CLM): Open the page > click Edit Page button from the top right corner.
4. The page has two main parts: the **PageHeader** pane for adding actions, and the **Label** pane for adding or updating content layout.

To adjust the grid area components and their properties, click on the bottom panel of the page. The Properties window appears.




5. Select **Data Grid** option from the properties window and drag it into the label pane; it will show records for the entity chosen during page creation.



6. The Properties window lets you control the grid area components and their characteristics. You can adjust the following grid layout properties:


| Options | Description |
|-------------|-------------|
| Details tab | |

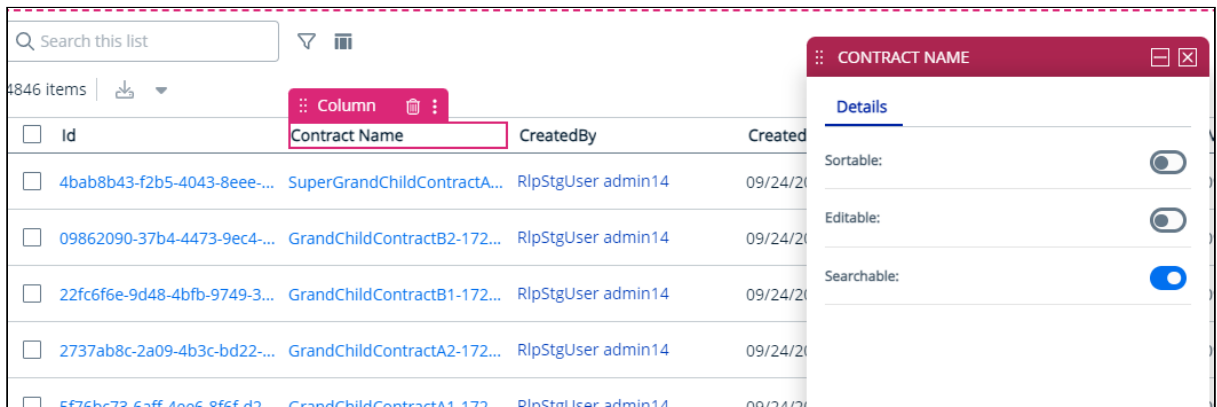
| | |
|----------------------------|--|
| <p>Hide Search Panel</p> | <p>Enable this toggle to hide the search panel grid.</p> |
| <p>Hide Field Selector</p> | <p>Enable this toggle to hide the field selector  (View Settings) from the grid.</p> |
| <p>Entity Type</p> | <p>This field displays the name of the object linked to the layout and is automatically filled based on the object you select while creating the layout.</p> |
| <p>Bulk Actions</p> | <p>Use this option to add or edit bulk actions for multiple records with JavaScript, such as options for editing or deleting. Click the Open link to add or edit JavaScript.</p> <div data-bbox="354 898 1426 1720" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Sample js for bulk delete and edit action</p> <pre>[{ "label": "Delete", "icon": { "name": "delete" }, "actionFunc": "grid-list::Grid::onBulkDelete", "actionCategory": "primary" }, { "label": "Bulk Edit", "icon": { "name": "edit" }, "actionFunc": "Grid::onBulkEdit::grid-list" }]</pre> </div> |

| | |
|-----------------------|--|
| <p>Custom Actions</p> | <p>Use this option to add new or edit existing custom actions in the page header with JavaScript. Click the Open link to add or edit JavaScript.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>i When you add more than two custom action buttons, the interface displays the first two buttons on the screen. You can access additional buttons through the Kebab menu. You can only add tertiary buttons.</p> </div> <div style="background-color: #f0f0f0; padding: 5px; margin: 10px 0;">Sample js for custom action</div> <pre>[{ "type": "button", "label": "YOU CAN CHANGE ME :)", "icon": { "name": "" }, "variant": ["Size.MD", "ButtonStyle.Outline", "ButtonColor.Primary"], "anchor": { "url": " https: // www.conga.com", "target": "PageTargetType.Dialog"}}, {"type": "button", "label": "CUSTOM ACTIONS ", " icon ":{" name ":" }," variant ":[" Size.MD "," ButtonStyle.Filled "," ButtonColor.Primary "], " actionFunc ":" Grid::onSave "},{ " label ":" More options "," icon ":{" name ":" fa - grid - 2 "}, " actionFunc ":" Grid::onEdit "}]</pre> |
|-----------------------|--|

| | |
|---------------------------|--|
| <p>Row Actions</p> | <p>Use this option to add or edit actions for rows with JavaScript, such as options for editing or deleting individual records. Click the Open link to add or edit JavaScript.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Sample js for row actions</p> <pre> [{ "label": "Edit", "actionFunc": "generic-page-template::GenericContainer::onEdit" }, { "label": "Delete", "actionFunc": "template-list::Grid::onDelete" }] </pre> </div> |
| <p>Rows Per Page</p> | <p>Enter the number of rows you want to display per page.</p> |
| <p>Content tab</p> | |
| <p>Manage Fields</p> | <p>Allows you to control which columns in the data grid 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.</p> |

- To set column-level properties, click the column name you want to modify. In the properties window, you can enable sorting, make the column field editable, or decide whether to allow searching based on the column field.

 For custom object layouts created via CX Studio, field-level edit permissions set in CX Studio take priority over general permission group access. Even if your role's Permission Group provides Edit access at the field level, you will not be able to edit values in the grid view columns unless they are explicitly set as "Editable".



8. Click **Publish** to save.

Managing Content Details View

You can manage the components of the *Record Detail* page, such as fields, sections, related items, etc. You can control which fields are displayed, the order in which they appear, and configure tabs to show associated fields. This section describes managing a record detail view page layout.

The Record Detail page consists of two main components:

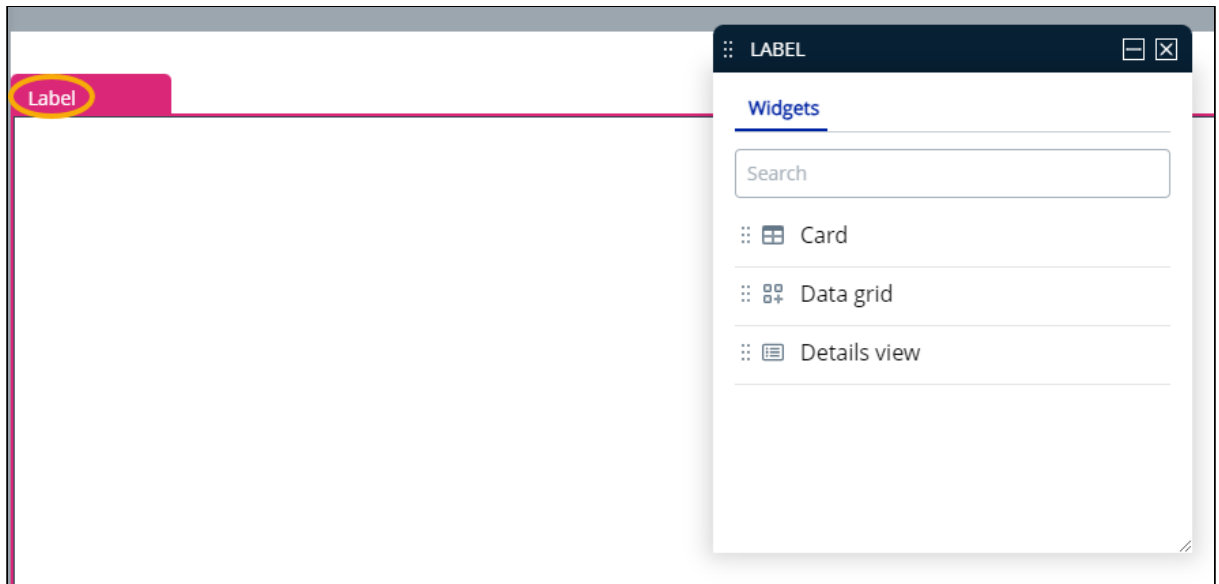
- **Details:** Displays information for a single record, including all its field metadata.
- **Sections:** Presented as tabs, showing a list view for related entities.

To manage a record detail page layout

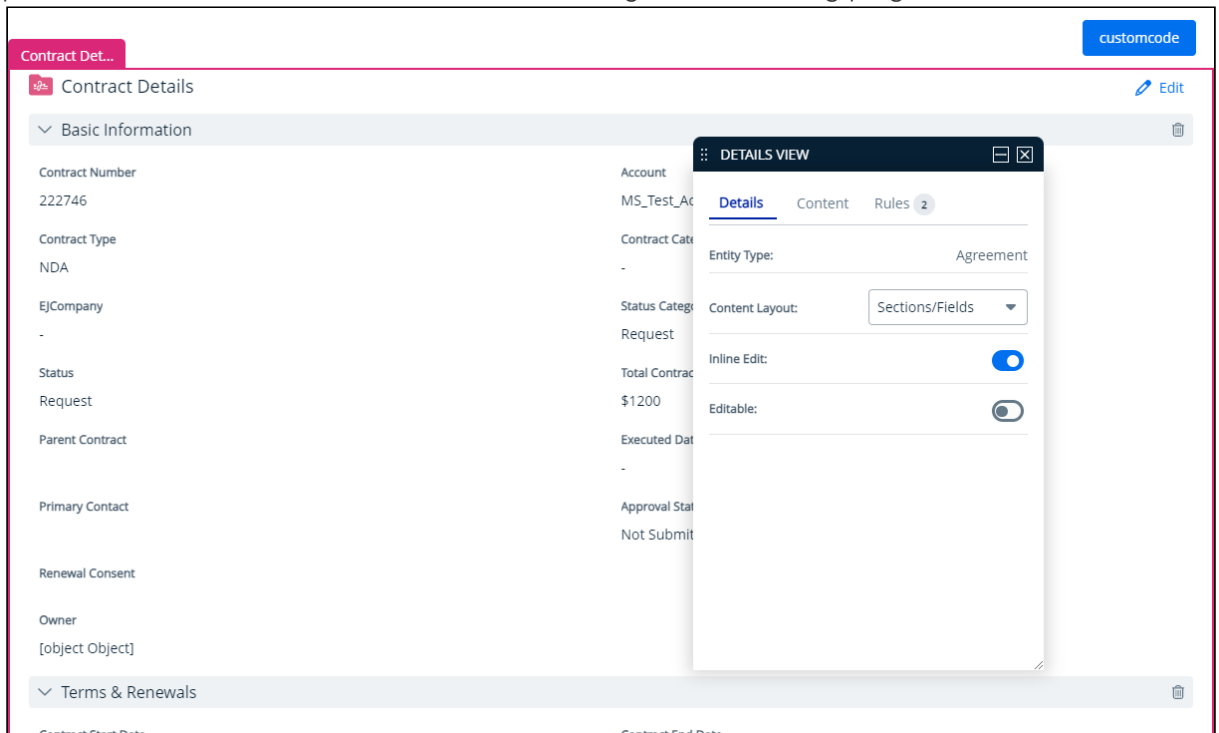
1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner then go to Apps > CX Studio.
3. Open the page or object layout properties in which you want to add or update the record detail view properties. You can open the detail page properties window in the following ways:
 - While Creating a New Page: Pages > New Page > select a template > Next > fill in details > Next.
 - While updating an Existing Page: Pages > click page name link.
 - While updating an Object Layout: Object Layouts > click the More (⋮) icon > Edit.
 - Editing a Page from RLP or a Supported Application (e.g., CLM): Open the page > click Edit Page button from the top right corner.
4. The page has two main parts: the **PageHeader** pane for adding actions, and the **Label** pane for adding or updating content layout.

To adjust the detail page components and their properties, click in the bottom panel of the page. The Properties window appears.

i The tabs in properties pane varies depending upon the page type. Widget can only be added to or modified for a page layout created from scratch in CX Studio.





5. Select **Details View** option from the properties window and drag it into the label pane; it will show record details for the entity chosen during page creation.



6. To manage the sections, fields, and their properties on the detail page, click the section name in the pane. From the properties window, You can perform the following actions on the record detail page:

| Options | Description |
|--------------------|--|
| Details tab | |
| Entity Type | Shows the object selected at the time of page creation. |
| Content Layout | Allows selecting the layout of your content: <ul style="list-style-type: none"> • Sections/Field: Select which sections and/or fields to include in the record detail pane layout. • Tabs/Sections: Select which tabs and/or sections to include in the record detail pane layout. |
| Inline Edit | Enable this toggle to allow editing data directly within the field on the same screen, without needing to open a separate form or window. |
| Editable | Enable this toggle to allow changes to the field. By default, the details view opens in read-only mode. When you enable this property, the form view appears instead of the read-only mode. This feature lets you change the field's properties or data using a separate form or dialog when the object is in create mode. |

| | |
|-------------------------------|--|
| <p>Field Level properties</p> | <p>To configure field level settings, go to the section and click on the field title you want to configure.</p> <ul style="list-style-type: none"> To make a field mandatory, turn on the Required toggle. To allow users to modify the field, turn on the Editable toggle. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>i For custom object layouts created via CX Studio, field-level edit permissions set in CX Studio take priority over general permission group access. Even if your role's Permission Group provides Edit access at the field level, you will not be able to edit values in the record detail view fields unless they are explicitly set as "Editable" in the CX Studio layout properties.</p> </div> <ul style="list-style-type: none"> To show an info icon next to the field name for additional information about the field's purpose or usage, turn on the Show Info Icon toggle. By default, the description you add when creating a field in the schema manager is displayed. You can edit this description if needed. To edit the description, click the Edit () icon and enter or modify text in the Enter Info Text field. |
| <p>Content tab</p> | |
| <p>Sections</p> | <p>Allows to add a section for related lists and easily rearrange its position by dragging and dropping it above or below other sections.</p> <p>You can create a new section or select an existing one from the list.</p> <ul style="list-style-type: none"> To define a new section: <ol style="list-style-type: none"> Click Add Section. The Add Section window appears. Enter the Section Name as per your business needs. Click Add. The newly added section now appears under the list of sections. To add an existing section to the details page: <ol style="list-style-type: none"> Drag and drop the section in your details page layout. The section now appears in your details page layout. Click and drag a section name to Move it before or after another section in the list. To remove a section from the details page, select the section and click the Delete () icon. |
| <p>Manage Fields</p> | <p>Allows to control which entities are displayed on a detail page and in what order. Search for and drag-and-drop fields in the detail page layout.</p> |
| <p>Rules</p> | |

| |
|--|
| Allows you to set visibility or validation rules for page tabs, sections, and fields within a detail page. To learn more about rules, see Applying Rules . |
| Widget |
| Allows to modify the page layout. Select a layout from the list and drag it into the pane to apply it. |

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

Adding Actions to Page Header

You can add action items (buttons) to perform specific tasks, such as navigating to a different page, executing a workflow, or running custom code. Using CX Studio, you can add action items when creating a new page or editing an existing object layout page. This section explains how to add an action button to the page header.

To add an action button

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > Apps > CX Studio.
3. You can add actions to the PageHeader panel in the following ways:
 - While Creating a New Page: Pages > New Page > select a template > Next > fill in details > Next.
 - While updating an Existing Page: Pages > click page name link.
 - While updating an Object Layout: Object Layouts > click the More (⋮) icon > Edit.
 - Editing a Page from RLP or a Supported Application (e.g., CLM): Open the page > click Edit Page button from the top right corner.
4. The **PageHeader** is selected by default. The Properties popup appears with two tabs: Details and Rules.
5. Go to the Details tab to manage actions and click **Add Action** button. The New Actions window appears.

| Field | Description |
|-------------|--|
| Action Name | Enter the name of the action as per your business needs. |

| Field | Description |
|-----------------|--|
| Action Function | <p>Select the name of the action function where you want to redirect the user when the action button is clicked.</p> <ul style="list-style-type: none"> • Navigate: Redirects the user to a different screen. • Execute Workflow: Performs operations as defined in the workflow. • Execute Custom Code: Executes operations as defined in custom code. |
| Params | <p>Enter the parameter relevant to the selected action functions. Use the syntax as shown in the example below:</p> <div data-bbox="651 779 1425 869" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Navigation URL</p> </div> <p>Format to navigate to the external page: url:https://<page URL>/ Sample: url:https://documentation.conga.com/</p> <p>Format to navigate within the application: url:/ <path after the domain name> Sample: url:/workflow</p> <div data-bbox="651 1227 1425 1451" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Workflow ID</p> </div> <p>Format to execute workflow: id:{workflowid} Sample: id:6c803fb3-29b0-48d9-9873-90964d65430a</p> <div data-bbox="651 1480 1425 1865" style="border: 1px solid #ccc; padding: 5px;"> <p>Custom API URL</p> </div> <p>Format: method:<method name>, resourceName:<Custom Code project name>,url: response Sample: method:post,resourceName:codeExecution,url:response</p> |

6. Use Rules tab to set visibility or validation rules for the action button. To learn more about applying rule, see [Applying Rules](#).

7. Click **Publish** to apply changes.



Applying Rules

You can set visibility or validation rules for page header actions, page tabs, sections within a detail page, and fields. Access the rule engine from the Page Listing, Object Layout Listing, or directly from other applications like CLM that support Conga RLP. This section explains how to add rules to actions, sections of the record detail page, fields of the record detail page, and tabs.

For example, configure validation rules for contracts such as:

- If a user enters a currency value, they must select a currency type, or the system displays an error message.
- For contracts with the "MSA" agreement type, display the "Additional Information" section.
- If the contract number is not provided, display an error message in the contract number field.
- Display or hide actions and custom actions on the UI based on defined rule criteria.

To add a rule

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner > Apps > CX Studio.
3. You can access the rule engine in the following ways:
 - While Creating a New Page: Pages > New Page > select a template > Next > fill in details > Next.
 - While updating an Existing Page: Pages > click page name link.
 - While updating an Object Layout: Object Layouts > click the More () icon > Edit.
 - Editing a Page from RLP or a Supported Application (e.g., CLM): Open the page > click the **Edit Page** button from the top right corner.
4. The properties popup appears with two tabs: Details and Rules.
 - To add a rule to an action, click the PageHeader pane.
 - To add a rule to a section or field of the record detail page, click on the Record Detail View pane. If there are multiple tabs on the detail page, select the tab you want to work with, and then make your selection.
5. Go to Properties window and click Rules tab.
6. Click Add Rule. The New Rule window lets you define rule conditions and actions using JSON format.

New Rule

*** Name**

*** Description**


Rule Condition JSON

```
{
  "criteria": [
    {
      "componentId": "contract_type",
      "componentProperty": "value",
      "validation": {
        "logicalOperator": "=",
        "comparisonValue": "NDA",
        "condition": "ValueMatchesStaticCondition"
      }
    }
  ]
}
```

Rule Action JSON

```
{
  "invalid": [],
  "valid": [
    {
      "dependentComponentId": "section-key_dates",
      "property": "hidden",
      "value": true
    }
  ]
}
```

Cancel Save

 You can either define the rule's conditions and actions in JSON or leave these fields blank, save the rule, and then define the criteria using the Advanced Rule Editor UI.

| Field | Description |
|-------------|--|
| Name | Enter the rule's name. |
| Description | Enter a description for the rule you want to define. |

| Rule Con ditio n JSO N and Rule Acti on JSO N | Insert the rule condition criteria in JSON format. | |
|---|---|---|
| | Rule Condition JSON | Rule Action JSON |
| | Example: Adding a Rule to the Action button in the page header To restrict access to the "customcode" action button for users with the admin role, add the following rule condition and action criteria in JSON format: | |
| | <pre> { "criteria": [{ "componentId": "cos-page-header", "validation": { "condition": "CustomCondition", "validationFunc": "function (payload) {\n const userRole = payload.userInfo?.Role; \n return (userRole?.Name ?? '') === 'Admin';\n}" } }], "logicalExpression": "" } </pre> | <pre> { "valid": [{ "ruleFunc": "function (payload) {\nconst props = {};\nprops.items = payload.element.actionBar.actions.map(\n(item) => {\nif (item.key === 'customcode') {\n item.hidden = true;\n}\n return item;\n} \n);\nreturn props;\n}" }], "invalid": [{ "ruleFunc": "function (payload) {\nconst props = {};\nprops.items = payload.element.actionBar.actions.map(\n(item) => {\nif (item.key === 'testaction_1') {\n item.hidden = true;\n}\n return item; \n }\n);\n return props; \n}" }] </pre> |
| Example: Show or hide section on the record details page. Hide the "Key Dates" section on the record details page only for NDA or MSA agreement record types. Display this section for all other agreement record types. | | |

```

{
  "criteria": [
    {
      "componentId":
"RecordType",

      "componentProperty":
"value",
      "validation": {

"logicalOperator": "=",

"comparisonValue":
"NDA",
      "condition":
"ValueMatchesStaticCond
ition"
    }
  ],
  {
    "componentId":
"RecordType",

    "componentProperty":
"value",
    "validation": {

"logicalOperator": "=",

"comparisonValue":
"MSA",
      "condition":
"ValueMatchesStaticCond
ition"
    }
  ]
},
  "logicalExpression":
"1 OR 2"
}

```

```

{
  "valid": [
    {
      "dependentComponentId": "section-
key_dates",
      "property": "hidden",
      "value": true
    }
  ],
  "invalid": [
    {
      "dependentComponentId": "section-
key_dates",
      "property": "hidden",
      "value": false
    }
  ]
}

```

Example: Show or Hide tab in the multi tab detail page.

i To implement the same rule using the Advanced Rule Editor UI, see [Controlling Tab Visibility using Rule Editor UI](#).

Consider a layout with two tabs: "Main Details" and "Terms & Renewals." Define the rule criteria as follows:

- If the contract name in the "Main Details" tab is "Conga," the "Terms & Renewals" tab will be hidden.
- If the contract name is anything other than "Conga," the "Terms & Renewals" tab will be visible.

```
{
  "criteria": [
    {
      "componentId": "Name",
      "componentProperty":
"value",
      "validation": {
        "logicalOperator": "=",
        "comparisonValue":
"Conga",
        "condition":
"ValueMatchesStaticCondition"
      },
      "type": "Field",
      "id": "ui-rule-
criteria-17246514671043630892
16487876"
    }
  ],
  "logicalExpression": "(1)"
}
```

```
{
  "valid": [
    {
      "dependentComponentId": "tab-2",
      "property": "hidden",
      "value": true,
      "dependentParentId": "agreement_tabs"
    }
  ],
  "invalid": [
    {
      "dependentComponentId": "tab-2",
      "property": "hidden",
      "value": false,
      "dependentParentId": "agreement_tabs"
    }
  ]
}
```

7. Click **Save**.

- To define rule criteria from the UI, click Advanced Rule Edit. The Rules window appears.

Rules

Contract Rule Execute when page loads

IF Help

| | Object | Field | Operator | Value |
|----|---------------|----------|----------|-------------|
| 1. | User Criteria | UserName | Equals | James Smith |

[Add Criteria](#)

Then Add Else action Help

| | Action | Component | Section |
|----|--------|-----------|-----------|
| 1. | Hide | Section | Key Dates |

[Add Action](#)

Else Help

| | Action | Component | Section |
|----|--------|-----------|------------------|
| 1. | Show | Section | Terms & Renewals |

[Add Action](#)

[Cancel](#) [Save](#)


- All defined rules are listed in Rule dropdown. Select the rule you wish to work on.

| Field | Description |
|-------------------------|--|
| Execute when page loads | Enable this toggle to apply the defined rule criteria at the time of page loading. |

| Field | Description |
|-------|---|
| IF | <ul style="list-style-type: none"> • Click Add Criteria and then select Field Criteria option to create or manage a condition criteria for fields or select User Criteria to define criteria involving logged-in user info. <ul style="list-style-type: none"> • Field - Field dropdown options are populated based on the selected object. Select the field you want to set as the condition criterion. • Operator - You must select the logical operator from the picklist. This forms the relationship between the field and its value. • Value - The value field changes based on the selected operator options. Enter or select the value for the specified field. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Example: Multiple Criteria</p> <pre> { "criteria": [{ "componentId": "Name", "componentProperty": "value", "validation": { "logicalOperator": "!=", "comparisonValue": "Test", "condition": "ValueMatchesStaticCondition" } }, { "componentId": "StatusCategory", "componentProperty": "value", "validation": { "logicalOperator": "=", "comparisonValue": "Request", "condition": "ValueMatchesStaticCondition" } }] }</pre> </div> |

| Field | Description |
|--|--|
| | <pre data-bbox="667 327 1425 1137"> "componentId": "RecordType", "componentProperty": "value", "validation": { "logicalOperator": "=", "comparisonValue": "Corporate", "condition": "ValueMatchesStaticCondition" } }, { "componentId": "AgreementNumber", "componentProperty": "value", "validation": { "logicalOperator": "=", "comparisonValue": "123", "condition": "ValueMatchesStaticCondition" } }], </pre> <ul data-bbox="735 1151 1406 1339" style="list-style-type: none"> • Filter Expression: By default, the application uses AND logic for all criteria. However, you can modify this to fit your needs and create nested logical expressions if desired. For example, 1 AND 2 AND (3 OR 4). |
| Then | Click Add Action to create or manage an action that executes when the condition criteria are met. |
| Else | Click Add Action to create or manage an action that executes when the condition criteria are not met. |
| Add Else action | Enable this toggle to set up an Else action that follows the Then action. The Else panel will become available once you enable this option. |
| Delete () | Removes expression. |



10. Find the new rule under the Rules tab. Toggle the switch at the end of the rule name to activate it.

11. To edit, delete or clone the rule, click the more () icon at the end of the rule and select an appropriate option.
12. Click Publish to apply the rule to the page.

Edit Rule

The Advanced Rule Edit feature enables you to add or modify rules directly through the user interface. When setting conditions for visibility rules, you are not restricted to fields on the current tab. You can also reference fields from other tabs and use object fields that are not included in the page layout.

To Edit Rule

1. Open the page or object layout in edit mode. You can open it in different ways:
 - To edit a page layout created from the CX studio: CX Studio > Pages > click page name link.
 - To edit an Object Layout created from the CX studio: CX Studio > Object Layouts > click the More () icon > Edit.
 - To edit a page layout from RLP or a Supported Application (e.g., CLM): Open the page > click the **Edit Page** button from the top right corner.
2. The properties popup appears with two tabs: Details and Rules.
 - To edit a rule for an action, click the PageHeader pane.
 - To edit a rule for a section or field on the record detail page, click on the Record Detail View pane. If there are multiple tabs on the detail page, select the tab you want to work with, and then make your selection.
3. Go to Properties window and click **Rules** tab. The Rule list appears.
4. To edit the rule in the JSON editor, click the More () icon next to the Rule icon. The Edit Rule window appears. Make your updates in the JSON criteria.
5. To edit the rule using UI, click **Advanced Rule Edit**. The Rule UI Editor appears. Select the rule from the dropdown list and update the criteria as needed.
6. Click **Save** and, then **Publish**.

Controlling Tab Visibility using Rule Editor UI

If your layout includes multiple tabs with detailed views, you can control the visibility of each tab by applying rules.

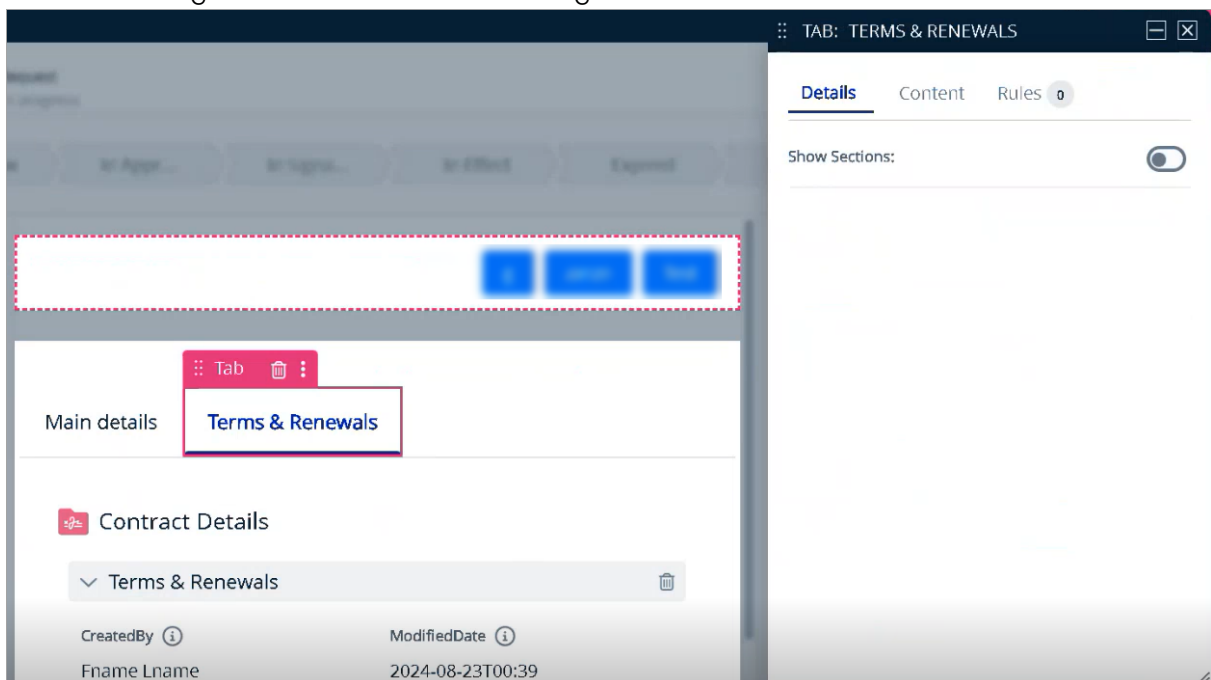
Example Scenario: Consider a layout with two tabs: "Main Details" and "Terms & Renewals." Define the rule criteria as follows:

- If the contract name in the "Main Details" tab is "Conga," the "Terms & Renewals" tab will be hidden.
- If the contract name is anything other than "Conga," the "Terms & Renewals" tab will be visible.

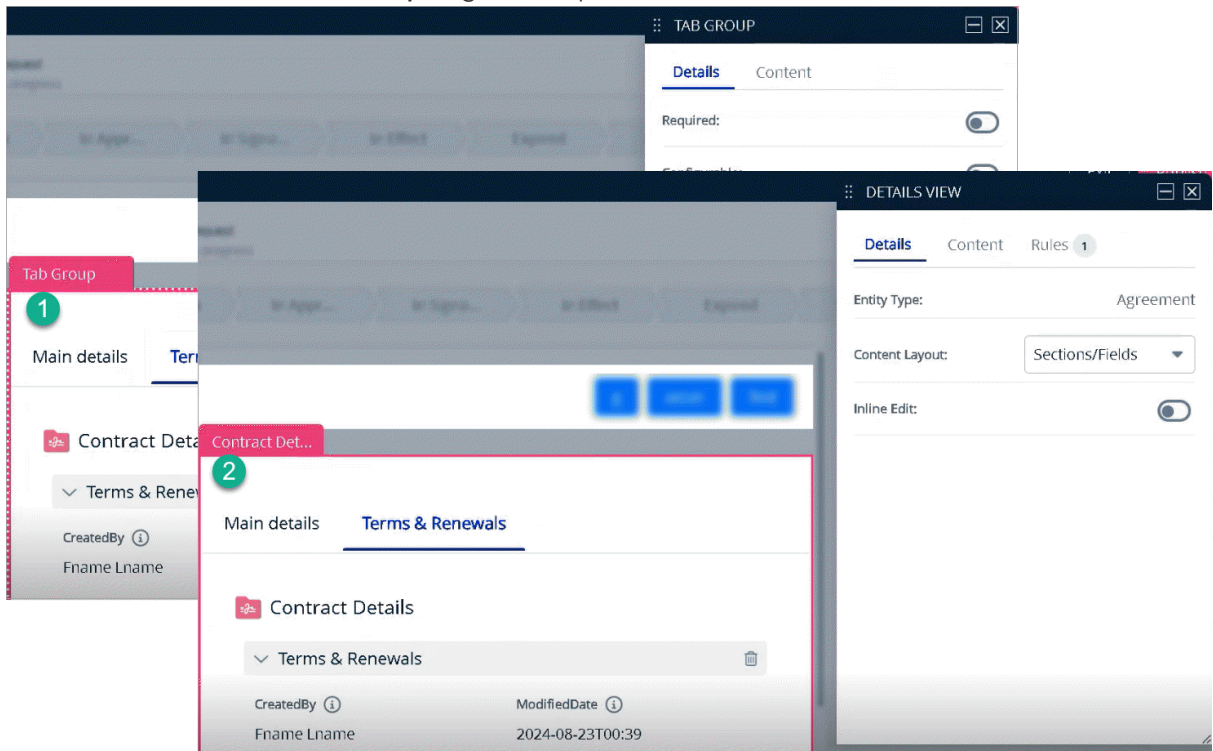
This section explains how to manage rules for showing or hiding tabs. The steps provided use the example scenario above for better understanding.

To add rules for showing or hiding tabs using the rule editor UI

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner > Apps > CX Studio.
3. Go to the multi tab layout and click the **Edit Page** button from the top right corner.
4. Click the tab you want to control visibility.



5. Double click on the **Tab Group** region (i.e. parent of tab).



6. Go to Properties window and click Rules tab.
7. Click Add Rule. Enter the Name and Description in the the New Rule window, and click **Save**.
8. Click the **Advanced Rule Edit**. The Rule UI Editor appears. Select the rule from the dropdown list and update the criteria as needed.

Rules

Hide-Show Terms & Renewals tab Execute when page loads

IF Help

| Object | Field | Operator | Value |
|-------------------|---------------|----------|-------|
| 1. Field Criteria | Contract Name | Equals | Conga |

[Add Criteria](#)

Then Add Else action Help

| Action | Component | Tab |
|---------|-----------|------------------|
| 1. Hide | Tab | Terms & Renewals |

[Add Action](#)

Else Help

| Action | Component | Tab |
|---------|-----------|------------------|
| 1. Show | Tab | Terms & Renewals |

[Add Action](#)

[Cancel](#) [Save](#)

9. Click **Save** and, then **Publish**.

Behavior and Best Practices

- When editing a rule, first select the appropriate tab, then click on the Tab Group region. If you choose a rule from a different tab, the fields from that tab will not appear in the Advanced Rule Edit UI.
- In a multiple tabs layout, rules apply only to the tab that is currently active. For instance, rules configured for Tab 1 will execute only when Tab 1 is selected. Similarly, rules for Tab 2 will execute only when Tab 2 is selected.
- Each tab requires separate configuration for fields. For instance, if both Tab-1 and Tab-2 include the fields Contract Name, Renewal Consent, and Source, you must set up individual rules for each tab.
 - Tab-1: If Contract Name is set to "Conga," hide the Source field and keep the Renewal Consent field visible.
 - Tab-2: If Contract Name is set to "Conga," hide both the Source and Renewal Consent fields.

Cloning Standard Actions

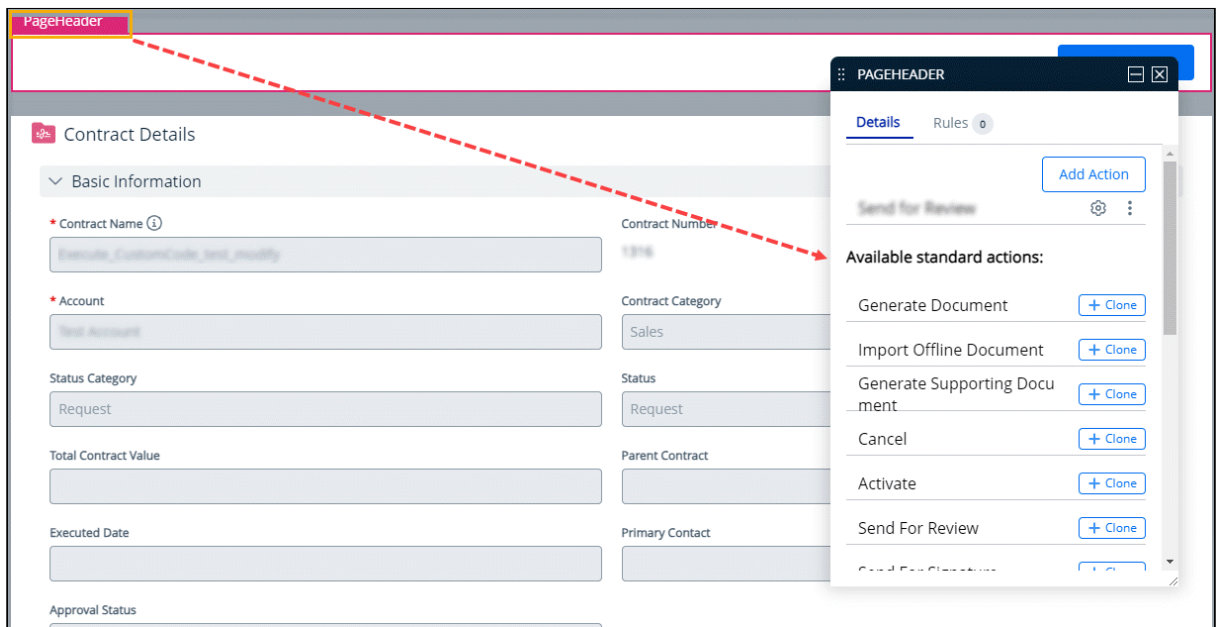
Cloning an action involves creating a copy of an existing standard action, which can then be renamed to suit your needs and used in the action pane of your object layout. This section explains how to clone standard actions.

Use cases for cloning standard actions:

- Custom Action Labels: You may want to rename actions to fit specific business terms or processes.
- Tailored User Experiences: Cloning allows you to create different versions of actions for different user profiles or record types.
- Conditional Actions: You can configure cloned actions to appear only under specific conditions, offering more control over the user interface.

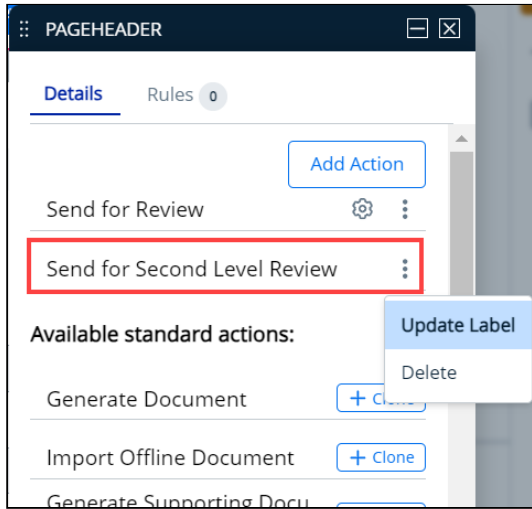
To clone a standard action in the CX Studio

1. Log in to the Conga Platform as an admin user.
2. Go to the object layout (e.g. Account, Contract) where you want to clone an action.
3. Click the **Edit Page** button in the top-right corner.
4. Click the **PageHeader** pane. The Properties pop-up lists all the standard actions under the Details tab.



5. Go to the standard action you want to clone, and click the **+Clone** button next to the action name. The Clone Action pop-up appears.
6. Rename the cloned action with a unique name, and click **Clone**.

- The cloned action will appear in the action list above the standard actions. You can then update its label or delete it if needed.



Once cloned, you can modify the action's visibility by applying a rule. For instance, you can set a specific visibility rule for when the action appears. For more information, see [Applying Rules](#).

Application Manager



The Application Manager module allows you to create, manage, and customize applications. You can rearrange apps as icons in the global navigation and control their accessibility based on permission groups.

This module has two main sections:

- Apps:** You can create an individual app and associate it with an App Group later. These apps are called related apps. You can also add, remove, or rearrange pages within the app. For example, you can create a CLM app and add pages like My Contracts, Recently Viewed, and Contract Intelligence. Once ready, you can link the CLM app to the Contracts App Group.

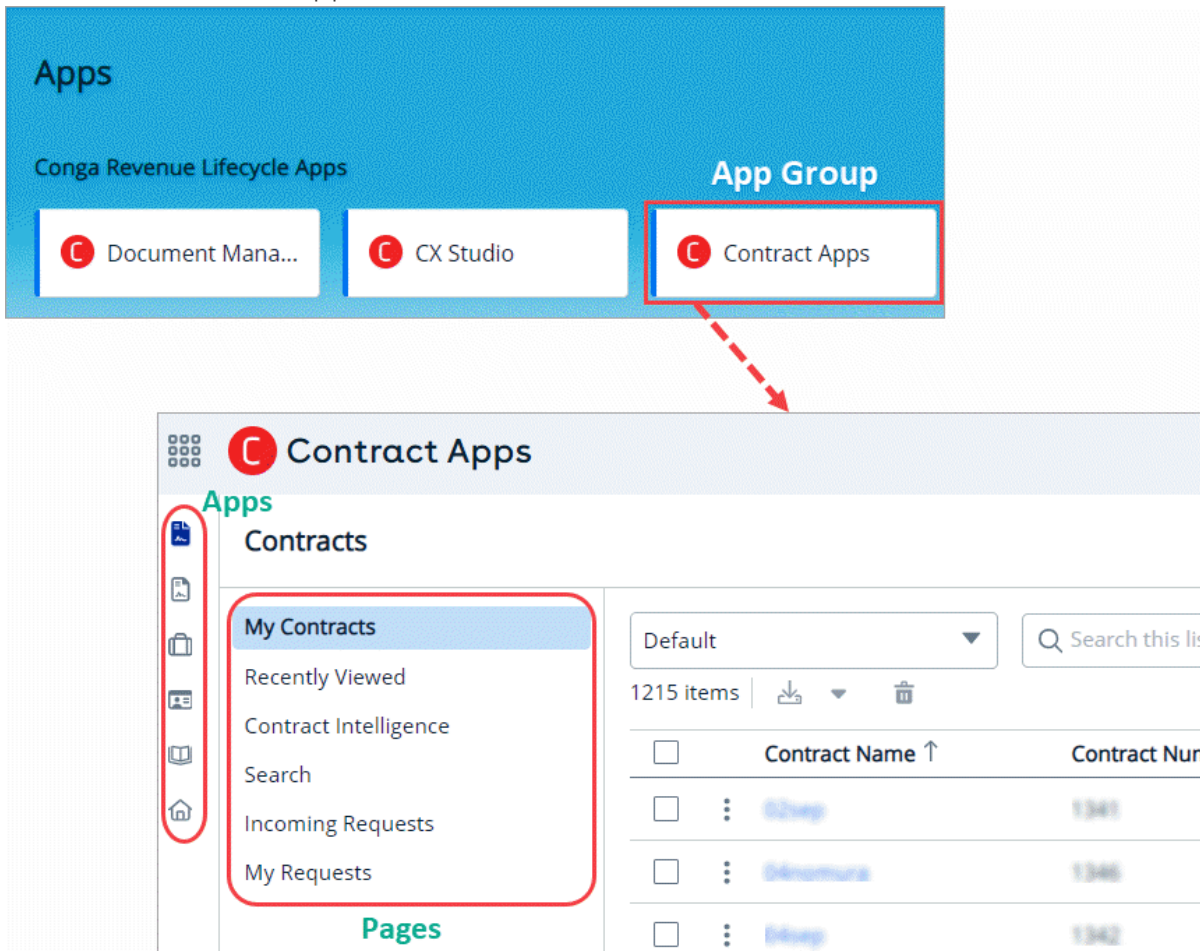
| Name | CreatedBy | CreatedDate | ModifiedBy | ModifiedDate | Group | URL |
|----------------|--------------|---------------------|--------------|---------------------|---------------|--------------------------------|
| CLM | Fname Lname | 22/08/2024 08:11 PM | Fname Lname | 22/08/2024 08:11 PM | Contract Apps | /clm |
| Contacts | Fname Lname | 22/08/2024 08:33 PM | Fname Lname | 22/08/2024 08:33 PM | Contract Apps | /admin/contact |
| CLM Admin | System Admin | 21/12/2023 07:56 PM | System Admin | 12/06/2024 04:34 PM | Contract Apps | /clmadmin |
| Accounts | Fname Lname | 23/08/2024 03:22 PM | Fname Lname | 23/08/2024 03:22 PM | Contract Apps | /admin/account |
| CLM Dashboard | System Admin | 16/10/2023 10:51 AM | System Admin | 19/07/2024 01:09 PM | Contract Apps | /embedded-analytics/dashboards |
| Clause Library | System Admin | 16/10/2023 10:51 AM | System Admin | 12/06/2024 04:34 PM | Contract Apps | /clmadmin/clause-library |

- **App Groups:** Displays a list of app groups within the system. You can create app groups like Revenue Apps, Admin Apps, or CX Studio. You can also rearrange the apps associated with these groups in the global navigation.

| Apps | | App Groups | | | |
|----------------------------|--------------|---------------------|--------------|---|--|
| Default | | Q Search this list | |   | |
| Name | CreatedBy | CreatedDate | ModifiedBy | ModifiedDate | |
| ⋮ Document Management Apps | System Admin | 16/10/2023 10:51 AM | System Admin | 16/10/2023 10:51 AM | |
| ⋮ CX Studio | System Admin | 21/03/2024 10:44 AM | Fname Lname | 22/08/2024 11:17 AM | |
| ⋮ Shared Apps | System Admin | 16/10/2023 10:51 AM | System Admin | 16/10/2023 10:51 AM | |
| ⋮ Conga Apps | System Admin | 16/10/2023 10:51 AM | System Admin | 16/10/2023 10:51 AM | |
| ⋮ Contract Apps | System Admin | 16/10/2023 10:51 AM | System Admin | 16/10/2023 10:51 AM | |
| ⋮ Dev Console | System Admin | 16/10/2023 10:51 AM | System Admin | 11/01/2024 12:09 PM | |
| ⋮ Admin Console | System Admin | 16/10/2023 10:51 AM | System Admin | 11/01/2024 12:09 PM | |
| ⋮ Application Groups | System Admin | 16/10/2023 10:51 AM | System Admin | 16/10/2023 10:51 AM | |

For example, you can create a Contract Apps as an App Group and then add related apps like CLM, CLM Admin, Contracts, Account, and Clause Library. When creating an app, you will be asked to select a group to associate it with. These associated apps are called Related Apps. The Contract App will appear as the main app group, and CLM, CLM Admin, Contract, Account, and Clause Library will appear in the global navigation when you

access the Contract Apps.



This section explains how to create an app, create an app group, remove an app from a group, and rearrange associated apps. The steps provided use the example scenario above for better understanding.

To create an app group


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher (☰) icon from the top-left corner, then go to Admin Console and click **Application Manager**.
3. Click the **New** dropdown menu in the top right corner and select App Group option. The New App Group window appears.
4. Enter or select values for the following:

| Field | Description |
|-------|---|
| Name | Enter a name for the App Group such as Contract Apps. |


| Field | Description |
|------------------|--|
| Permission Group | Select permission group(s) from the list. Permission groups determine a given user's access to applications, objects, records, and permissions to perform actions on the Conga Revenue Lifecycle Platform. For more information on permission groups, see Creating Permission Groups . |
| Home URL | Enter the application home URL. Format: /<path after the domain name> Sample: /cx-studio |

5. Click **Save**. The success message appears.

The newly created app group is now listed under the App Groups tab. You can now create a new app and associate it with the app group.

 If the Home URL is left blank, the system will automatically add the newly created app group under "Apps" in the App Launcher once the app is associated with the group.

To create an app

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner, then go to Admin Console and click **Application Manager**.
3. Click the **New** dropdown menu in the top right corner and select App option. The New App window appears.
4. Enter or select values for the following:


| Field | Description |
|-------|--|
| Name | Enter a name for the App such as CLM, CPQ, etc. |
| Icon | Enter the icon name. The application currently supports the Font Awesome icon library. Format: fa-<icon name> For example: fa-gear |

| Field | Description |
|------------------|--|
| URL | Enter the URL of the app where you want to redirect the user. For example: /clm |
| Group | Search for and select the App Group you want to link the app to, such as "Contract Apps". |
| Permission Group | Select permission group(s) from the list. Permission groups determine a given user's access to applications, objects, records, and permissions to perform actions on the Conga Revenue Lifecycle Platform. For more information on permission groups, see Creating Permission Groups . <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i When a user tries to access the app, App Group level permissions take priority. If these permissions are not defined, the system will use App level permissions instead. If neither App Group level permissions nor App level permissions are set, only platform admin users will see the app icon in the global navigation.</p> </div> |
| Is In Menu | Turn on this toggle to display the app icon in the global navigation. |

5. Click **Save**. The success message appears.

The new app is now listed under the Apps tab and is also linked to the App Group as a relative app.

To create a page

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner, then go to Admin Console and click **Application Manager**.
3. Search for the desired apps under which you want to add a page (e.g., "CLM"), and select it. The Details page appears.
4. Go to the Pages tab.
5. Click the **New Page**. The New Page/Menu window appears.
6. Enter or select values for the following:


| Field | Description |
|------------------|---|
| Name | Enter a name for the page such as My Contracts, Recently Viewed, and Contract Intelligence, etc. |
| URL | Enter the path to which the page will redirect. Format: /<base page URL>/<page URL> |
| Permission Group | Select permission group(s) from the list. Permission groups determine a given user's access to applications, objects, records, and permissions to perform actions on the Conga Revenue Lifecycle Platform. For more information on permission groups, see Creating Permission Groups . <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i App Group permissions take priority over other permissions. If App Group permissions are not set, the system defaults to App-level permissions. If both App Group and App-level permissions are missing, the system will use page-level permissions. If no permissions are defined, only platform admin users will be able to access the page from global navigation.</p> </div> |
| Parent Menu | Select a parent page if you want to add a child page. By default, no parent page is set. |
| Base Page URL | Enter the base page URL of the app under which you want to add a page. Format: /<base page URL>/<page URL> For example: /clm |


7. Click **Save**. The success message appears.

The new page will now appear under the Pages tab for the app. You can rearrange or remove it from this tab as needed.

To rearrange app icons in global navigation

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

2. Click the App Launcher () icon from the top-left corner, then go to Admin Console and click **Application Manager**.
3. Go to the App Groups tab, search for the desired group (e.g., "Contract Apps"), and select it. The App Group details page appears.
4. Go to the Related Apps tab. It lists all the apps linked to the selected App Group such as CLM, CLM Admin, Accounts, etc.
5. Click and hold the Grab Handle icon next to the app Id, then drag and drop it to rearrange the app's position above or below other apps.

| ← Contract Apps | | | | | | |
|---|----------------|---------------------|---------------------|--------------------|---------------------|--|
| Details | | <u>Related Apps</u> | | | | |
| Id | Name | CreatedBy | CreatedDate | ModifiedBy | ModifiedDate | |
| ⋮ b08a38c7-e606-44a7-82ef-... | CLM Admin | RlpStgUser admin13 | 05/08/2023 12:18 PM | System Admin | 06/13/2024 5:39 AM | |
|  82847eb0-f643-4dc1-85df-... | Accounts | System Admin | 09/22/2023 9:49 AM | System Admin | 04/18/2024 5:44 AM | |
| ⋮ b099f19f-c12b-4e18-9240-7... | CLM | RlpStgUser admin13 | 05/08/2023 12:18 PM | RlpStgUser admin14 | 07/23/2024 10:49 AM | |
| ⋮ eeb7fd02-4b41-4660-8af6-... | Contacts | System Admin | 09/22/2023 9:49 AM | System Admin | 04/18/2024 5:44 AM | |
| ⋮ 859fc1c7-8186-4150-a81d-3... | Clause Library | System Admin | 06/09/2023 11:03 AM | System Admin | 06/13/2024 5:39 AM | |
| ⋮ 404ff077-3c02-4257-8555-b... | CLM Dashboard | System Admin | 09/22/2023 9:49 AM | System Admin | 07/24/2024 7:19 AM | |

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:

| Mime Types/File Extensions | Format |
|----------------------------|---|
| aac | "audio/aac" |
| abw | "application/x-abiword" |
| arc | "application/x-freearc" |
| avif | "image/avif" |
| avi | "video/x-msvideo" |
| azw | "application/vnd.amazon.ebook" |
| bin | "application/octet-stream" |
| bmp | "image/bmp" |
| bz | "application/x-bzip" |
| bz2 | "application/x-bzip2" |
| cda | "application/x-cdf" |
| csh | "application/x-csh" |
| css | "text/css" |
| csv | "text/csv" |
| doc | "application/msword" |
| docx | "application/vnd.openxmlformats-officedocument.wordprocessingml.document" |
| eot | "application/vnd.ms-fontobject" |

| Mime Types/File Extensions | Format |
|----------------------------|---------------------------------------|
| epub | "application/epub+zip" |
| gz | "application/gzip" |
| gif | "image/gif" |
| htm | "text/html" |
| html | "text/html" |
| ico | "image/vnd.microsoft.icon" |
| ics | "text/calendar" |
| jar | "application/java-archive" |
| jpeg | "image/jpeg", "application/photoshop" |
| jpg | "image/jpeg", "application/photoshop" |
| js | "text/javascript" |
| json | "application/json" |
| jsonld | "application/ld+json" |
| mid | "audio/midi", "audio/x-midi" |
| midi | "audio/midi", "audio/x-midi" |
| mjs | "text/javascript" |
| mp3 | "audio/mpeg" |

| Mime Types/File Extensions | Format |
|----------------------------|---|
| mp4 | "video/mp4" |
| mpeg | "video/mpeg" |
| mpkg | "application/vnd.apple.installer+xml" |
| msg | "application/vnd.ms-outlook" |
| odp | "application/vnd.oasis.opendocument.presentation" |
| ods | "application/vnd.oasis.opendocument.spreadsheet" |
| odt | "application/vnd.oasis.opendocument.text" |
| oga | "audio/ogg" |
| ogv | "video/ogg" |
| ogx | "application/ogg" |
| opus | "audio/opus" |
| otf | "font/otf" |
| png | "image/png" |
| pdf | "application/pdf" |
| php | "application/x-httpd-php" |
| ppt | "application/vnd.ms-powerpoint" |
| pptx | "application/vnd.openxmlformats-officedocument.presentationml.presentation" |

| Mime Types/File Extensions | Format |
|----------------------------|-------------------------|
| rar | "application/vnd.rar" |
| rtf | "application/rtf" |
| sh | "application/x-sh" |
| svg | "image/svg+xml" |
| tar | "application/x-tar" |
| tif | "image/tiff" |
| tiff | "image/tiff" |
| ts | "video/mp2t" |
| ttf | "font/ttf" |
| txt | "text/plain" |
| vsd | "application/vnd.visio" |
| wav | "audio/wav" |
| weba | "audio/webm" |
| webm | "video/webm" |
| webp | "image/webp" |
| woff | "font/woff" |
| woff2 | "font/woff2" |

| Mime Types/File Extensions | Format |
|----------------------------|---|
| xhtml | "application/xhtml+xml" |
| xls | "application/vnd.ms-excel" |
| xlsx | "application/vnd.ms-excel", "application/vnd.openxmlformats-officedocument.spreadsheetml.sheet" |
| xml | "application/xml", "text/xml", "application/atom+xml" |
| xul | "application/vnd.mozilla.xul+xml" |
| zip | "application/zip" |
| 3gp | "audio/3gpp", "video/3gpp" |
| 3g2 | "audio/3gpp2", "video/3gpp2" |
| 7z | "application/x-7z-compressed" |

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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