Testing Guide

Release 8
Revised 18 November 2014

This testing guide will walk you through how to test your Conga Conductor® and Conga Workflow solutions before deploying them fully.

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General Disclaimer

Conga Conductor, Conga Workflow and Conga Composer solutions depend on and leverage technology from a multitude of software and hardware vendors including but not limited to salesforce.com, Microsoft, Google, and the providers of various Internet browsers (“Third Party Technology”). Output from Conga Conductor, Conga Workflow and Conga Composer solutions can be impacted by these and numerous other factors beyond the control of Conga, including:

- Template design errors in Microsoft Word, Excel, PowerPoint templates, PDF Forms or Conga HTML email templates
- The nature and scope of data and/or images being retrieved for merging into templates
- Individual user’s browser, network, ISP and/or hardware settings (see Conga Composer Installation and Administration Guide for additional details)
- The use of any encryption gateways or appliances that require any re-direct of Conga Composer traffic
- The availability and performance of the salesforce.com service and other software-as-a-service solutions such as eSignature, eCommerce and other AppExchange products, and periodic updates, enhancements or other changes to such services made by their respective vendors
- Salesforce.com security settings including User Profiles and Permissions, folder and object access and field-level security
- Internet performance, regional and even global outages

For these reasons, Conga cannot guarantee that your particular implementation of Third Party Technology and Conga technologies – even if configured based on Conga documentation and/or guidance offered by Conga Support personnel – will perform consistent with your expectations or requirements, or provide the output you require. Accordingly, Conga disclaims any and all liability resulting from, or related to, performance issues associated with Conga products to the extent arising from your implementation, configuration, or the behavior of Third Party Technology.

Upgrading from Conga Conductor Release 7 or Conga Workflow Release 7?

While Conga has made every effort to make Conga Conductor Release 8, Conga Workflow Release 8 and Conga Composer Release 8 backwards compatible with Conga Conductor Release 7, Conga Workflow Release 7 and Conga Composer Release 7, a small number of cases have been reported where the behavior of and/or output from Conga Conductor Release 8, Conga Workflow Release 8 or Conga Composer Release 8 varies in content or appearance from Conga Conductor Release 7, Conga Workflow Release 7 or Conga Composer Release 7. It is the Customer’s responsibility to thoroughly test all existing solutions with Conga Conductor Release 8, Conga Workflow Release 8 and Conga Composer Release 8 to ensure they perform as desired, and to make any necessary adjustments to templates, queries, reports or other components.
Welcome

Conga Conductor processes batches of Conga Composer solutions while Conga Workflow automates Conga Composer via a Salesforce workflow rule. With these capabilities come great implications.

For Conga Conductor, remember that you are launching a batch of Conga Composer solutions, potentially sending documents, emails, eSignature requests, etc. to hundreds of recipients. With Conga Workflow, a Conga Composer solution is initiated without interaction from a user; again, sending automatically a document, email, eSignature request, etc. to a recipient.

Because of these wonderful batch processing and automation capabilities, it is imperative that you thoroughly test your Conga Conductor and Conga Workflow solutions before deploying them completely. This guide will walk you through how to test your Conga Conductor and Conga Workflow solutions.

The testing instructions work well for a variety of Conga Conductor and Conga Workflow situations:

- New Release 8 solutions that need to be tested before full deployment
- Release 7 solutions that need to be tested on Release 8 before the Conga Conductor and/or Conga Workflow package(s) is(are) upgraded to Release 8

Before You Get Started

This guide assumes that you have built a Conga Conductor or Conga Workflow solution but have not yet deployed that solution. The testing described here should be completed before deployment to ensure that everything is working correctly.

Conga Conductor and Conga Workflow are add-ons to an active Conga Composer subscription and are purchased separately. The Conga Conductor and/or Conga Workflow services must be activated by Conga before use. Please contact Conga at support@congamerge.com to subscribe or start a free trial.
Conga Conductor Testing on Release 8

Follow the below instructions if you are using Conga Conductor Release 8.

1. Gather Sample Master Records for Your Test Batch

Sample records are used so that during the testing phase you won’t send documents/communications to actual recipients (customers, partners, employees, etc.).

If you are using the Conga Conductor record to launch your Conductor solution, you can either:

- Write a Salesforce report or SOQL query that includes a handful of records and reference it using the Report Id or Query Id field on the Conga Conductor record.
- Reference one Master Object record at a time using the Record Id field on the Conga Conductor record.

If you’re using a Salesforce list view to launch Conductor, then you’ll:

- Use a Salesforce list view to select a few records.

Tips and Tricks

For solutions that send emails or eSignature requests, ensure that you have access to the recipient’s email inboxes (or use your own email address) so you can confirm receipt of the email message/eSignature request.

2. Launch Your Test Batch

Launching your test batch is determined by which method you used to gather sample records.

1. Salesforce report/SOQL query – Launch from the Conga Conductor record
2. One Master record at a time – Launch from the Conga Conductor record
3. Salesforce list view – Launch using a Conductor list view button
3. Analyze the Results

This is perhaps the most important step in the testing process, as you will determine if everything is working correctly and you can deploy your solution or if there are inconsistencies or issues and you need to configure further or troubleshoot.

You should confirm that the following aspects of your Conductor solution are working properly:

- Reports and queries are retrieving data to be used in the template
- Data is merging to the template, creating the merged output file
- Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
- Fields on the email or eSignature request are referencing the proper information and the email or eSignature request is sending

If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see What If My Solution Doesn’t Work as Desired? in this guide.
Conga Conductor Testing – Upgrading from Release 7

Follow the below instructions if you are currently running Conga Conductor solutions on Release 7 and wish to upgrade to Conga Conductor Release 8. To test your Conga Conductor Release 7 solutions on Conga Conductor Release 8, you'll first need to upgrade to Conga Conductor Release 8. For further upgrade instructions, please see the Conga Conductor Release 8 Installation and Administration Guide. Rest assured, the upgrade process will retain all of your existing Conga Conductor solutions from Release 7; these solutions will be available on Release 7 or can be upgraded to run on Release 8.

Test Using the Conga Conductor Record

1. **Clone the Conga Conductor record.**
   
   Clone your existing Conga Conductor record. We'll use this cloned record for testing so as not to interfere with your existing solution.

   ![Clone Record Example]

   Include “Test Release 8” in the Title of the new, cloned record.

2. **Gather sample Master records for your test batch.**

   Sample records are used so that during the testing phase you won’t send documents/communications to actual recipients (customers, partners, employees, etc.).

   You may want to create new, sample records with fake data to ensure that documents and/or communications are not sent to actual recipients when testing.

   For solutions that send emails or eSignature requests, ensure that you have access to the recipient’s email inboxes (or use your own email address) so you can confirm receipt of the email message/eSignature request.
Using the Conga Conductor record to launch your Conductor solution, you can either:

- Write a Salesforce report or SOQL query that includes a handful of sample records and reference it using the Report Id or Query Id field on the Conga Conductor record.
- Reference one Master Object sample record at a time using the Record Id field on the Conga Conductor record.

Ensure the proper Conga Conductor formula field (API name) is referenced in the URL Field Name field. This should have copied over when you cloned the original Conductor record. Save your changes.
3. Add Version and Conductor Environment to the Conductor page layout.

Edit the Conga Conductor page layout to add the Version and Conductor Environment fields. Save your changes.

4. Configure the Conductor record to run on Release 8 and the beta server.

Change the value for the Version field to “C8” and for Conductor Environment to “beta-.” The Version field ensures that the batch process will run on Conga Conductor Release 8 while the Conductor Environment controls on which Conga server the solution will run.
5. **Launch Conga Conductor.**

Use the Launch button to initiate the Conga Conductor process.

If you’re prompted to allow or deny permissions for Composer 8 Beta, we recommend clicking **Allow**, which uses a Salesforce refresh token and may be revoked at any time (Salesforce | My Settings | Personal | Advanced User Details | OAuth Connected Apps). If you select **Deny**, a session ID will be used for security settings instead of a refresh token.
6. Start the Conga Conductor process and analyze the results.

This is perhaps the most important step in the testing process, as you will determine if everything is working correctly and you can deploy your solution or if there are inconsistencies or issues and you need to configure further or troubleshoot.

You should confirm that the following aspects of your Conductor solution are working properly:

- Reports and queries are retrieving data to be used in the template
- Data is merging to the template, creating the merged output file
- Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
- Fields on the email or eSignature request are referencing the proper information and the email or eSignature request is sending

If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see What If My Solution Doesn’t Work as Desired? in this guide.
Test Using a Conga Conductor List View Button

Remember, to test your Conga Conductor Release 7 solutions on Conga Conductor Release 8, you’ll first need to [upgrade to Conga Conductor Release 8](#).

Upgrade to R8, clone existing list view button, test with sample records.

1. **Copy the OnClick JavaScript from the Sample List View Button on the Conga Conductor object.**

Navigate to Salesforce Setup | Build | Create | Objects | Conga Conductor | Buttons, Links, and Actions | Sample List View Button.

![Copy code to your computer's clipboard](image)
2. Create a list button on your Master Object.

![Custom Button or Link Edit](image)

a. **Paste** the OnClick JavaScript code you copied from the Conga Conductor Sample List View Button into the body of your new button.

b. **Label** the button as CN 8 Beta. (CN is the abbreviation for Conductor.)

c. Set the **Display Type** to List Button and enable Display Checkboxes.

d. Ensure the button’s **Behavior** is set to Execute JavaScript.

e. Set the **Content Source** as OnClick JavaScript.

f. Set the **$ObjectType** to your Master Object by choosing $ObjectType from the Select Field Type picklist and then choosing your Master Object from the Insert Field picklist.

g. Set the **urlFieldName** value to the API name of your Conductor formula field.

h. Change the **var CongaURL** to:

3. Edit the Master Object List View under Search Layouts.

4. Add your CN 8 Beta button to the Selected Buttons menu and Save.

5. Create a test list view on the appropriate Master Object in order to gather sample records to use in your testing.

We recommend naming the list view “Test CN Release 8 – [Conductor Solution Name].” For example, “Test CN Release 8 – Oppty Invoice Email.”

You may want to create new, sample records with fake data to include in this list view to ensure that documents and/or communications are not sent to actual recipients while testing.
For solutions that send emails or eSignature requests, ensure that you have access to the recipients’ email inboxes (or use your own email address) so you can confirm receipt of the email message/eSignature request.

6. Select a few sample records from the sample list view created in step 5 and launch your CN8 Beta list view button.

7. Analyze your results.

This is perhaps the most important step in the testing process, as you will determine if everything is working correctly and you can deploy your solution or if there are inconsistencies or issues and you need to configure further or troubleshoot.

You should confirm that the following aspects of your Conductor solution are working properly:

- Reports and queries are retrieving data to be used in the template
- Data is merging to the template, creating the merged output file
- Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
- Fields on the email or eSignature request are referencing the proper information and the email or eSignature request is sending

If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see What If My Solution Doesn’t Work as Desired? in this guide.
Conga Workflow Testing on Release 8

Follow the below instructions if you are using Conga Workflow Release 8. You have two options when testing Conga Workflow, each of which are explained in detail below:

- Use the Salesforce workflow rule
- Create a hyperlink formula field

Test Using the Salesforce Workflow Rule

Use this method if you want to test the solution by triggering the Salesforce workflow rule.

1. **Confirm that your Conga Workflow formula field is accessible** (field-level security is set to “Visible”) by System Administrators only.
   
   This ensures that the activated Salesforce workflow rule that initiates the Conga Workflow process won’t work for anyone except System Administrators while you’re still in the testing phase.

2. **Select a sample Master Object with which to conduct your test.**
   
   You may want to create new, sample records with fake data to ensure that documents and/or communications are not sent to actual recipients while testing.

   For Conga Workflow solutions that send emails or eSignature requests, ensure that you have access to the recipient’s email inbox (or use your own email address) so you can confirm receipt of the email message/eSignature request.

3. **Trigger the Conga Workflow routine in the manner you defined on the Salesforce Workflow Rule.**

4. **Analyze the results.**
   
   This is perhaps the most important step in the testing process, as you will determine if everything is working correctly and you can deploy your solution or if there are inconsistencies or issues and you need to configure further or troubleshoot.

   You should confirm that the following aspects of your Conga Workflow solution are working properly:

   - Reports and queries are retrieving data to be used in the template
   - Data is merging to template and creating the merged output file
   - Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
   - Email or eSignature fields are referencing the proper information and the email or eSignature request is sending
If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see What If My Solution Doesn’t Work as Desired? in this guide.

Test Using a Hyperlink Formula Field

Use this method if you do not want to trigger the Salesforce workflow rule. You might begin testing with this method and if your testing is satisfactory, then graduate to testing by triggering the Salesforce workflow rule.

This hyperlink field will be placed on the Master Object page layout and allows the system administrator to run the Conga Workflow process without having to trigger the Salesforce workflow rule. The hyperlink field launches the Conga Composer user interface but runs on the Conga Workflow server, therefore you get the best of both worlds – all of the user interface capabilities of Conga Composer while running on Conga Workflow.

1. Create a custom formula field on your Master Object.
2. Label the field “Test” along with your Conga Workflow solution name and select Text as the Formula Return Type.
   For example, our field is called “Test Conga Workflow Invoice Email.”

3. Click the Advanced Formula tab, select the HYPERLINK function, and click the Insert Selected Function button.

4. Replace “url” with the following:
   "https://workflow.congamerge.com?SessionId="
   + $Api.Session_ID + "$ServerURL=" + $Api.Partner_Server_URL_290 +
5. Enter a new line after the URL you just replaced and enter the API name of your Conga Workflow formula field.
   Easily insert this field using the **Insert Field** button.

   ![Insert Field](image1)

6. Replace “friendly_name” with the name of your hyperlink as it will appear on the page layout.
   We recommend “Test Conga Workflow via UI.” **Delete “[, target]”**.

   ![Formula Field](image2)

---

**Tips and Tricks**

If you’re using **Professional Edition of Salesforce**, we recommend including the parameter and IF function

```
&DC=" + IF( $Profile.Name = "System Administrator", "0", "1"")
```

to ensure that only System Administrators can utilize this troubleshooting hyperlink field. Your full hyperlink formula field would then be:

```
```
7. **Click the Next button to establish field-level security.**
   We recommend making this field visible to only the System Administrator profile.
   If you’re using Profession Edition of Salesforce, please see the above **Tips and Tricks** paragraph.

8. **Add the field to the appropriate page layout(s) and Save.**

9. **You now have a hyperlink field on your Master Object page layout to run a single record through Conga Workflow for testing purposes.**
   Click the hyperlink to launch Conga Workflow through the Conga Composer user interface.

<table>
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<tr>
<th>Opportunity Detail</th>
<th>Edit</th>
<th>Delete</th>
<th>Clone</th>
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<td>Opportunity Name</td>
<td>Aethna Home Products - Big Deal</td>
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<td>Account Name</td>
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<td>Type</td>
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<td></td>
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<tr>
<td>Lead Source</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Test Conga Workflow Invoice Email Order Number</td>
<td></td>
<td></td>
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</tbody>
</table>

**Heads Up**
QMode parameters will not function when you run Conga Workflow using this technique, so you will need to launch Conga Workflow via the appropriate action from the Conga Composer user interface (Merge & Download, Email, etc.).
All other elements will perform as specified (activity logging, etc.).
From the Composer user interface you can view error messages, download the View Data workbook, and utilize the other troubleshooting techniques you’re accustomed to with Composer.
10. **Analyze the results.**

You should confirm that the following aspects of your Conga Workflow solution are working properly:

- Reports and queries are retrieving data to be used in the template
- Data is merging to the template, creating the merged output file
- Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
- Fields on the email or eSignature request are referencing the proper information and the email or eSignature request is sending

If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see [What If My Solution Doesn’t Work as Desired?](#) in this guide.
Conga Workflow Testing – Upgrading from Release 7

Follow the below instructions if you are currently running Conga Workflow solutions on Release 7 and wish to upgrade to Conga Workflow Release 8.

To test your Conga Workflow Release 7 solutions on Conga Workflow Release 8, you’ll first need to upgrade to Conga Workflow Release 8. For further upgrade instructions, please see the Conga Workflow Release 8 Installation and Administration Guide.

Heads Up

Conga Workflow Release 7 did not have a managed package (nothing was installed from the AppExchange). However, in Release 8, a managed package is installed from the above private AppExchange listing. Rest assured, all of your Conga Workflow solutions from Release 7 will remain available once you’ve upgraded to Release 8.

Test Using the Salesforce Workflow Rule

Use this method if you want to test the solution by triggering the Salesforce workflow rule.

1. **Confirm that your Conga Workflow formula field is accessible (field-level security is set to “Visible”) by System Administrators only.**
   This ensures that the activated Salesforce workflow rule that initiates the Conga Workflow process won’t work for anyone except System Administrators while you’re still in the testing phase.

2. **Clone your outbound message workflow action.**
3. **Update the outbound message for testing.**

![Outbound Message](image)

a. **Name** it “Test CW Release 8 – [Conga Workflow Solution Name].” For example, “Test CW Release 8 – Invoice Email.” CW is the abbreviation for Conga Workflow.

b. **Edit the Endpoint URL** to the following:

c. Include your Conga Workflow formula field and the Master Object ID in **Fields to Send**.

4. **Select a sample Master Object with which to conduct your test.**

You may want to create new, sample records with fake data to ensure that documents and/or communications are not sent to actual recipients while testing.

For Conga Workflow solutions that send emails or eSignature requests, ensure that you have access to the recipient’s email inbox (or use your own email address) so you can confirm receipt of the email message/eSignature request.

5. **Trigger the Conga Workflow routine in the manner you defined on the Salesforce Workflow Rule.**

6. **Analyze the results.**

   This is perhaps the most important step in the testing process, as you will determine if everything is working correctly and you can deploy your solution or if there are inconsistencies or issues and you need to configure further or troubleshoot.
You should confirm that the following aspects of your Conga Workflow solution are working properly:

- Reports and queries are retrieving data to be used in the template
- Data is merging to template and creating the merged output file
- Activity logging, field updates, saving a copy of the merged output file, and any other parameters are acting as desired
- Email or eSignature fields are referencing the proper information and the email or eSignature request is sending
- If any of the above components are failing or inaccurate, troubleshoot the solution and then re-test. If you need assistance, please see What If My Solution Doesn’t Work as Desired? in this guide.

Test Using a Hyperlink Formula Field

Use this method if you do not want to trigger the Salesforce workflow rule. You might begin testing with this method and if your testing is satisfactory, then graduate to testing by triggering the Salesforce workflow rule.

This hyperlink field will be placed on the Master Object page layout and allows the system administrator to run the Conga Workflow process without having to trigger the Salesforce workflow rule. The hyperlink field launches the Conga Composer user interface but runs on the Conga Workflow server, therefore you get the best of both worlds – all of the user interface capabilities of Conga Composer while running on Conga Workflow.

The instructions for using a hyperlink formula field are the same whether you are upgrading from Release 7 to Release 8 of Conga Workflow or starting fresh on Conga Workflow Release 8. Therefore, please see the Test Using a Hyperlink Formula Field section under Conga Workflow Release 8 for instructions.
Important Note

Unlike Release 7 of Conga Conductor and Conga Workflow, in Release 8 error messages are not logged as Salesforce Tasks. Instead, use the Conga Conductor Dashboard or Conga Workflow Dashboard (custom tabs) to review records that encountered problems and the associated error message.
What If My Solution Doesn’t Work as Desired?

If you encounter problems with your Conga Conductor or Conga Workflow solution while testing, please contact the Conga support team:

Conga Support by Phone:
Americas: Monday – Friday, 7:00 a.m. - 6:00 p.m. Mountain time
   (866) 502-3334 (toll free) or (303) 465-1616
EMEA: Monday – Friday, 9:00 a.m.- 5:00 p.m. London time
   +44 (0) 203 608 0165
APAC: Monday – Friday, 9:00 a.m. - 5:00 p.m. Sydney time
   +61 2 8417 2399

Conga Support by Email: support@congamerge.com

Submit a Case:
Navigate to www.congasphere.com

Click on 'Live Support'
Click on 'Submit a Case'
Conga Conductor Resources

We offer many resources to assist you in creating and configuring Conga Conductor solutions.

Documentation

The documentation page for Conga Conductor on CongaSphere includes links to the following:

- Conga Conductor Installation and Administration Guide explaining how to install and navigate the Conga Conductor application.
- Conga Conductor Configuration Guide detailing how to build Conga Conductor solutions.

Videos

Watch the What’s New in Conga Conductor and Conga Workflow Release 8 webinar to learn about the new features in Conga Conductor Release 8.
Conga Workflow Resources

We offer many resources to assist you in creating and configuring Conga Workflow solutions.

Documentation

The documentation page for Conga Workflow on CongaSphere includes links to the following:

- Conga Workflow Installation and Administration Guide explaining how to install and navigate the Conga Workflow application.
- Conga Workflow Configuration Guide detailing how to build Conga Workflow solutions.

Videos

Watch the What’s New in Conga Conductor and Conga Workflow Release 8 webinar to learn about the new features in Conga Workflow Release 8.