
Conga Composer Microsoft Excel Templates

Conga Composer 7 - Winter '13 Release

Welcome

Conga Composer lets you generate documents and spreadsheets by gathering data from Salesforce and merging to a template. The resulting file(s) can be printed or emailed and you can log the actions you've taken in Salesforce.

Conga Composer solutions let you create individual documents by clicking a button from a record in Salesforce.

Contacting Conga

Conga is a leading provider of software solutions to enrich your Salesforce experience, specializing in document creation tools that integrate data from Salesforce. Founded in 2006, Conga has since built a substantial market presence with thousands of customers worldwide.

Technical Support

At Conga, we are committed to providing you with timely answers to your technical support questions. We provide support to system administrators for our products via email or telephone. Generally, we're available weekdays, during the following hours:

North America

Support Hours: 8 a.m. – 8 p.m. Eastern Time
Tech Support Email: support@congame.com
Telephone: +1 303-465-1616 or (866) 502-3334

Europe, Middle East, Africa (EMEA)

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Asia / Pacific (APAC)

Support Hours: 9 a.m. – 5 p.m. Eastern Time
Tech Support Email: support@congame.com
Telephone: +61 28 417 2399

Sales

For information on other products from Conga, please contact our New Business team:

Sales Information Email: sales@congame.com

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Resources

Examples:

For detailed examples, including sample templates, report designs and sample output, please download the [Conga Composer Examples file](#).

Articles and Videos:

Conga provides an [online knowledgebase](#) and [YouTube channel](#) that are available 24X7 to help you answer questions.

QuickStarts:

Want to get started right away? Our Quick Start Guides will help you quickly generate your first Conga Composer solutions.

To learn more, go to our [Conga QuickStart Library](#).

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General Disclaimer

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 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 hardware settings
- The availability and performance of the salesforce.com service and other software-as-a-service solutions such as e-signature, e-commerce 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 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.

508 Compliance

Conga Composer is an installable package from the Salesforce AppExchange, which integrates with an individual customer's existing implementation of Salesforce. When properly configured, Conga Composer will run within an existing Salesforce instance without the need to view, manipulate or configure the application outside of the Salesforce user interface.

The use of Conga solutions is entirely represented by standard Salesforce user interface components when properly configured. Therefore, customers seeking the 508 Compliance VPAT documentation are referred to Salesforce.

Designing Microsoft Excel Merge Templates

Conga Composer can merge data into an Excel template. (Excel templates only work with Conga Composer, not Conga Mail Merge.)



What exactly is an Excel template? It's an Excel file (.xls or .xlsx) that contains one or more merge fields. In this chapter we'll examine how to create and edit Excel fields.

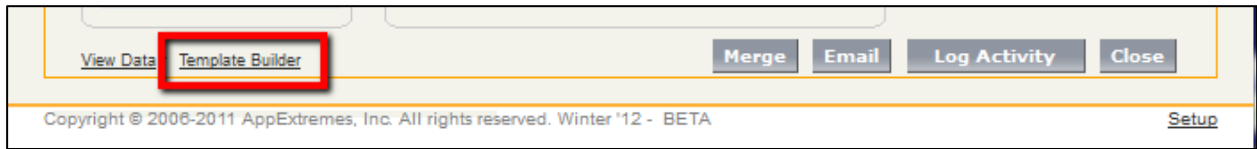
Conga Composer supports Excel templates saved in the Excel 2003 (".xls"), or Excel 2007/2010 (".xlsx") format. However, we recommend the Excel 2003 format (".xls") to ensure file format compatibility across a broad audience.

The first step in creating a template is to determine which fields are available, which we'll explore in the next section.

Tip! Sample Excel templates are available in the [sample template library](#) available from our website.

What Merge Fields are Available?

An essential tool in the development of Conga Composer solutions is the **Template Builder**. The Template Builder is located at the lower-left corner of the Conga Composer page.



Tip! You'll use the Template Builder frequently in the upcoming sections.

The Template Builder exposes the data retrieved by Conga Composer from the Master Object, and from any Salesforce Reports or Conga Queries referenced in the Conga Composer URL. (The use of Salesforce Reports and Conga Queries is described later in this chapter.)

Conga Composer

Template Builder
 Select the dataset to view its merge fields and sample data. Click a field name to copy it to the clipboard, the PowerPoint or PDF merge field.

Please note: long values in the Sample Data will appear truncated to 50 characters.

Dataset: Master 524 Columns, 1 Row

Live Search:

Field Name	Sample Data
ACCOUNT	Burlington & Textiles Corp of
ACCOUNT_ACCOUNTNUMBER	CD656092
ACCOUNT_ACTIVE	
ACCOUNT_ANNUALREVENUE	350000000

Select the desired dataset to view the available merge field names. The **field names listed in the left column** indicate the field names you must use in your templates. Filter the list of fields by entering search criteria in the Live Search box. You may search the field names or the sample data (drawn from the first row of data available).

Click the field name to copy it to the clipboard, then switch to your template (in Word, Excel, PowerPoint or a PDF Form) and paste the field name into the appropriate location (see the template-specific guides for information on how to create a merge field).

See the next page for several tips on how to best use the Template Builder.

Tip! If an Opportunity is your Master Object, Conga Composer will automatically make the Opportunity Line Items available for merging in the OppLineItems dataset.

Tip! If a Quote is your Master Object, Conga Composer will automatically make the Quote Line Items available for merging in the QuoteLineItems dataset.

Tip! The View Data link allows you to download the available data as an Excel workbook.

Tip! The *User* and *Org* datasets appear only if "Track Activities" is enabled for the Master Object

Create Merge Fields

With the Template Builder window close at hand, you're ready to begin creating merge fields.

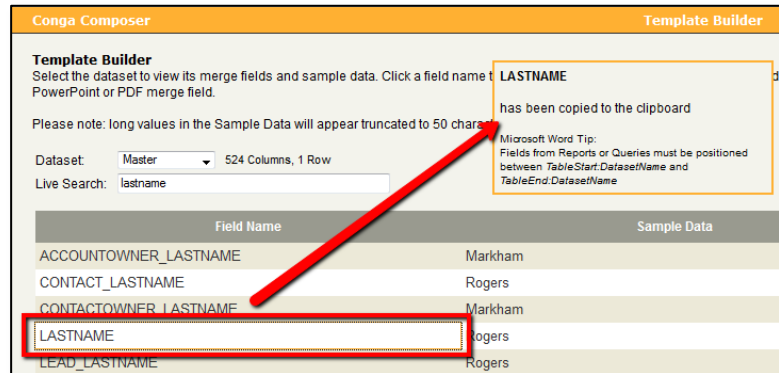
What exactly is an Excel merge field? It's an Excel formula that begins with **&=** followed by the View Data workbook sheet name, a period and then the field name. The format looks like: **&=DatasetName.FieldName**

➤ Creating Excel Merge Fields

1. In Excel, **create or open a workbook** to use as your template

2. Open the **Template Builder** window. Locate the field you'd like to use and **click the field name** to copy it to the clipboard.

Make note of the dataset name containing the field. It is referenced in the merge field.

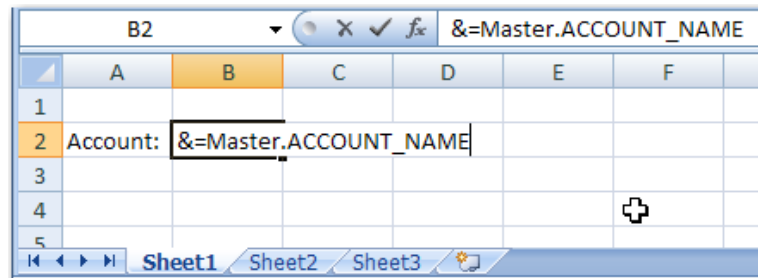


3. Switch to the Excel template and move to the location where you'd like the merge field

4. Create the field by following this convention:

&=DatasetName.FieldName

where *DatasetName* corresponds to the name of the dataset from the Template Builder window and *FieldName* is the field name copied to the clipboard in step 2.



Warning! The name of the sheet is case-sensitive. It *must* match the case as indicated on the Template Builder window. The Salesforce fieldname portion is *not* case-sensitive.

In the image above, the sheet name is *Master* with an upper-case "M".

Example:

Say we want to merge several fields from a Contact record, including the *LastName* field, into Excel. Assuming the Contact is the Master Object, the *LastName* field would appear on the *Master* sheet. The formula for this field would be **&=Master.LastName** .

The Contact also has a field called *CONTACT_MAILINGCITY*. The Excel merge field formula would be **&=Master.CONTACT_MAILINGCITY** .

Say we also have a field name on the ReportData dataset entitled *LastActivityDate*. The corresponding Excel merge field would be **&=ReportData.LastActivityDate** .

Finally, let's say we also want to include the current user's first name, which is visible on the *User* dataset on the Template Builder window as *USER_FIRSTNAME*. The corresponding Excel merge field would be **&=User.USER_FIRSTNAME** .

In each instance, notice that the sheet names (Master, ReportData and User) are case-sensitive.

Warning! Merge field formulas must stand-alone in a cell and cannot be used as part of a more complex formula. To use a merge field in a formula, put the merge field in a non-printing region (or a different sheet) and then refer to that cell in the formula.

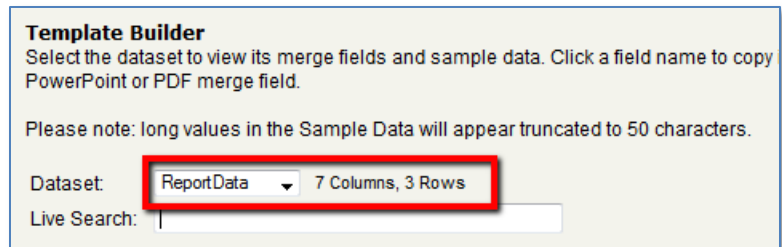
For more information, please see [FAQ: How can I use a merge field within a formula?](#)

➤ **Merging Detail Data**

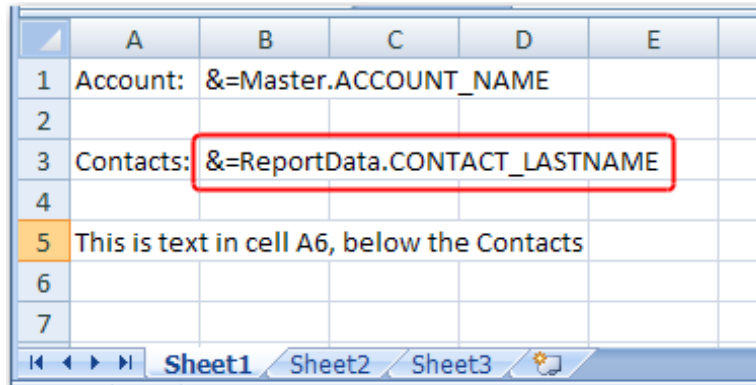
Conga Composer has the unique ability to use data from a Salesforce Report as *detail* data. Since you can retrieve multiple rows of data for each master object (e.g., invoice line items for each invoice), your Excel template needs to dynamically expand to accommodate an unlimited number of detail rows.

Fortunately, Conga Composer will automatically expand your template by adding rows (or columns if merging horizontally), for detail data.

Consider this data from a Template Builder window. Here, we have several Contacts related to an Account in the ReportData dataset:

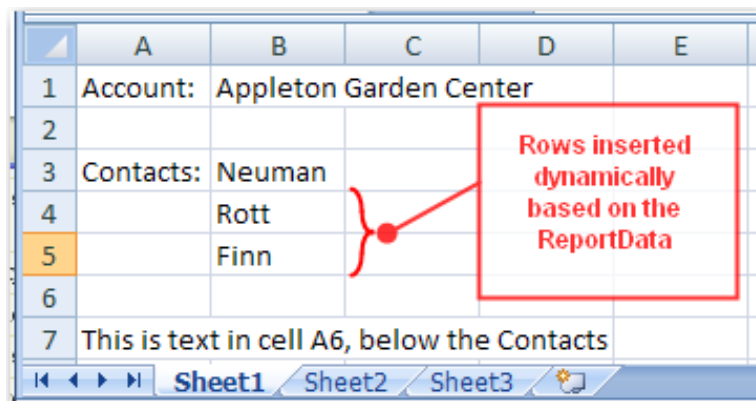


In our Excel template, say we lay out the merge fields like this:



When Conga Composer merges with this template, it will automatically insert rows to accommodate the number of rows on the ReportData sheet. The first Contact's data will be inserted into cell B3, then a new row will be inserted into the sheet and the second Contact's data will be inserted in B4, and so on.

The final output would look like this:



Tip! You can override the automatic insertion of rows or columns with the *Noadd* parameter. See the next section for details.

Refine Merge Fields with Parameters

You can tune Conga Composer's behavior when merging to Excel with *field parameters*. Each of the following parameters may be appended to the end of a merge field within parentheses, separating each with a comma.

PARAMETER	DESCRIPTION
Numeric	<p>Converts text data to numeric data, if possible.</p> <p>After converting to numeric, you may apply numeric formatting to the field.</p> <p>Note: Since ReportData columns are retrieved as text values, this parameter can be particularly useful in converting a ReportData column value from text to numeric **</p> <p>Example: &=ReportData.AMOUNT(Numeric)</p>
Horizontal	<p>Writes data left-to-right, instead of top-to-bottom.</p> <p>Note: Applies to datasets with multiple rows of data, e.g., ReportData</p> <p>Example: &=ReportData.CONTACT_LASTNAME(Horizontal)</p>
Skip:n	<p>Skip <i>n</i> number of rows for each row of data.</p> <p>Example: &=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME(Skip:1)</p>
Noadd	<p>Do not add extra rows (or columns) to fit data, i.e., detail data is written to cells without adding new rows (or columns) during the merge process</p> <p>Example: &=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME(Noadd)</p>
Group:Normal	<p>Groups the merge field values and displays the grouped value once per data group. Frequently accompanied by "Skip".</p> <p>See "FAQ: Grouping Data" for more details.</p> <p>Example: &=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTFAMILY(Group:Normal)</p>
Group:Merge	<p>Groups the merge field values and displays the grouped value once per data group. The cells in the group-by field for each group set are merged together. Frequently accompanied by "Skip".</p> <p>See "FAQ: Grouping Data" for more details.</p> <p>Example: &=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTFAMILY(Group:Merge)</p>

PARAMETER	DESCRIPTION										
<p>Subtotal<i>N</i>: <i>GroupByColumn</i></p>	<p>Performs a summary operation for a specified field related to a grouped field. The summary action, determined by <i>N</i>, is in the range 1 through 10 (see table below). The <i>GroupByColumn</i> is the field on which the data is grouped (separately).</p> <p>Requires:</p> <ul style="list-style-type: none"> • A separate column in which the Group parameter has been utilized <p><i>N</i> value choices:</p> <table border="0"> <tr> <td>1=AVERAGE</td> <td>6=PRODUCT</td> </tr> <tr> <td>2=COUNT</td> <td>7=STDEV</td> </tr> <tr> <td>3=COUNTA</td> <td>8=STDEVP</td> </tr> <tr> <td>4=MAX</td> <td>9=SUM</td> </tr> <tr> <td>5=MIN</td> <td>10=VAR</td> </tr> </table> <p>See Excel's help for more details about the Subtotal function.</p> <p>Example: &=OppLineItems.OPPORTUNITY_LINEITEM_SALESPRICE(Subtotal19:OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTFAMILY)</p> <p>Note: Subtotal can be also used as an independent function, as in: &=Subtotal19:OppLineItems.Product_Family</p>	1=AVERAGE	6=PRODUCT	2=COUNT	7=STDEV	3=COUNTA	8=STDEVP	4=MAX	9=SUM	5=MIN	10=VAR
1=AVERAGE	6=PRODUCT										
2=COUNT	7=STDEV										
3=COUNTA	8=STDEVP										
4=MAX	9=SUM										
5=MIN	10=VAR										

Example 1:

Say we want to merge Opportunity Line Items on an Excel template. To merge them vertically (the typical method), your template would look like this:

	A	B	C	D	E	F
1	=&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME					
2						
3						

Assuming we have three items from the OpplineItems sheet, the output would look like this:

	A	B	C	D	E	F
1	Conga Courier					
2	Conga Merge					
3	PharmaNow CRM					
4						

Example 2:

To write data left-to-write, include the *Horizontal* parameter. In this example, the Product Names from an opportunity are written left-to-right.

&=ReportData. OPPORTUNITY_LINEITEM_PRODUCTNAME(Horizontal)

	A	B	C	D	E	F	G
1	=&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME(Horizontal)						
2							

The output after adding the *Horizontal* parameter would look like:

	A	B	C	D	E
1	Conga Courier	Conga Merge	PharmaNow CRM		
2					
3					
4					

Data arranged horizontally

Example 3:

Extending the previous example, say we want Opportunity Line Items (and Sales Price) to appear from left-to-right across a page. We've also included headers each product column (Product 1, Product 2 and Product 3). To prevent Conga Composer from inserting new columns, we've added the *Noadd* parameter:

&=ReportData. OPPORTUNITY_LINEITEM_PRODUCTNAME(Horizontal, Noadd)

	A	B	C	D	E
1	Product 1	Product 2	Product 3		
2	&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME(Horizontal, Noadd)				
3	&=OppLineItems.OPPORTUNITY_LINEITEM_SALESPRICE(Horizontal, Noadd)				

The output from this horizontal merge would look like:

	A	B	C	D
1	Product 1	Product 2	Product 3	
2	Conga Courier	Conga Merge	PharmaNow CRM	
3	\$360	\$144	\$780	
4				

Example 4:

The *Skip:n* parameter can be helpful when you want to insert alternating data on every other row (from fields containing multiple values).

In this example, we'd like to have an Opportunity Line Item Product appear, then the Sales Price below the product, followed by another product and price, and so on.

Usually, the *Noadd* parameter accompanies the *Skip:n* parameter.

	A	B	C	D	E	F
1	&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME(Skip:1, Noadd)					
2	&=OppLineItems.OPPORTUNITY_LINEITEM_SALESPRICE(Skip:1, Noadd)					
3						
4						
5						

The output from this template would look like:

	A	B	C	D
1	Conga Courier			
2	\$360			
3	Conga Merge			
4	144			
5	PharmaNow CRM			
6	780			
7				
8				

Special Merge Fields

Conga Composer offers several additional merge fields for even more flexibility in your merge templates.

➤ **Today's Date (Text)**

By creating a merge field with the name **&=Date.Today**, Conga Composer will insert the current date as a text string. Although this field is easy to use, you won't be able to apply a date-format to this value because it's text.

➤ **Today's Date (Date/Time Value)**

By creating a merge field with the name **&=Date.TodayDT**, Conga Composer will insert the current date as a date/time value. The benefit of this field is that you can format the resulting date with any of Excel's date-formatting options.

➤ **Dynamic Formulas**

Dynamic Formulas allow you to insert Excel's formulas into cells even when the formula must reference rows that will be inserted later during the merge process. They can repeat for each inserted row or use only the cell where the field is placed.

Dynamic Formulas begin with **&=** and are followed by an Excel formula.

Repeating Dynamic Formulas begin with **&=&=** and are followed by an Excel formula.

You may use any of Excel's functions in a Dynamic Formula.

The following parameters apply to Dynamic Formulas.

PARAMETER	DESCRIPTION
{r}	<p>Indicates to use the current row number</p> <p>Used in conjunction with a column letter to indicate a cell on the current row.</p> <p>Example: When the following is placed in cell C1: &=A{r}*B{r} results in the formula =A1*B1</p>
{integer}	<p>Offset to current row number, where <i>integer</i> is a positive or negative number that represents the number of rows above or below the current row.</p> <p>Used in conjunction with a column letter to indicate a particular cell offset by the number of rows indicated by the <i>integer</i>.</p> <p>Examples: {2} would mean to reference a cell two rows below the current row {-1} would mean to reference a cell one row <i>above</i> the current row</p> <p>When placed in cell A10: &=E{1}*D{1} results in the formula =E11*D11</p>

Example 1:

Say we're creating a quote using Opportunities with Opportunity Line Items and we'd like to do some of the math for each Line Item in Excel. (This example is purely academic – Salesforce already computes the product for you.)

We'll start with a Template Builder window that looks like this:

Template Builder
 Select the dataset to view its merge fields and sample data. Click a field name to copy it to the clipboard, then paste it into a PowerPoint or PDF merge field.

Please note: long values in the Sample Data will appear truncated to 50 characters.

Dataset: OppLineItems 45 Columns, 7 Rows

Live Search:

Field Name	Sample Data
ID	00kA000000AxOTNIA3
ID_15	006A0000004NTVf
INCLUDE	True
OPPORTUNITY_LINEITEM_COMMENTS_NOTES	
OPPORTUNITY_LINEITEM_CREATEDBY	Michael Markham
OPPORTUNITY_LINEITEM_CREATEDBYID	005A0000000SNSMIA4

We'll create a template that includes a Dynamic Formula to find the product of the price multiplied by the quantity.

	A	B	C	D
1	Product:	Sales Price:	Quantity:	Total:
	&=OppLineItems. OPPORTUNITY_ LINEITEM_	&=OppLineItems. OPPORTUNITY_ LINEITEM_	&=OppLineItems. OPPORTUNITY_ LINEITEM_	&==B{r} * C{r}
2	PRODUCTNAME	SALESPRICE	QUANTITY	
3				
4	Dynamic Formula: &==B{r} * C{r}			
5				

The output from this merge would look like:

	A	B	C	D
1	Product:	Sales Price:	Quantity:	Total:
2	Conga Courier	\$360	5	\$1,800
3	Conga Merge	\$144	60	
4	PharmaNow CRM	\$780	1	
5				

In this case the total *does not repeat* for each row. If you want it to repeat, use a *Repeating Dynamic Formula* as shown next.

Example 2:

Let's extend the previous example by changing the Dynamic Formula to a Repeating Dynamic Formula.

Here's the modified template:

	A	B	C	D
1	Product:	Sales Price:	Quantity:	Total:
2	&=OppLineItems.OPPORTUNITY _LINEITEM_PRODUCTNAME	&=OppLineItems.OPPORTUNITY_ LINEITEM_SALESPRICE	&=OppLineItems.OPPORTUNITY_ _LINEITEM_QUANTITY	&=&=B{r} * C{r}
3				
4				
5				

Repeating Dynamic Formula: &=&=B{r} * C{r}

The output from this merge would look like:

	A	B	C	D
1	Product:	Sales Price:	Quantity:	Total:
2	Conga Courier	\$360	5	\$1,800
3	Conga Merge	\$144	60	\$8,640
4	PharmaNow CRM	\$780	1	\$780

Microsoft Excel FAQs

➤ **How can I use a merge field within a formula?**

For merge fields that will be referenced by other fields using Excel formulas, we've found the easiest way to approach this is to **place merge in a non-printing area of the worksheet or on a separate worksheet.**

Then, in formulas elsewhere on the spreadsheet, use the cell coordinates to refer to the value.

In this image, we have a non-printing area of the spreadsheet with many fields.

To use one of these cells in a formula, you would simply refer to the cell reference in the formula. Here, we're combining the city, state and postalcode values with a comma-space after the city field and a space between the state and postal code.

I	J	K	L
Not Included in Print Area. Fields used in formulas.			
&=Org.Org_Street			
&=Org.Org_City			
&=Org.Org_State			
&=Org.Org_PostalCode			
&=Master.Contact_FirstName			
&=Master.Contact_LastName			
&=Master.Contact_MailingStreet			
&=Master.Contact_MailingCity			
&=Master.Contact_MailingState			
&=Master.Contact_MailingPostalCode			
&=User.User_FirstName			
&=User.User_LastName			

`=CONCATENATE(I9," ",J10," ",I11)`

Tip! Use =CONCATENATE(...) to join field values together. The abbreviated ("&") function is not supported.

➤ **How do I set the Printable Area of the Spreadsheet**

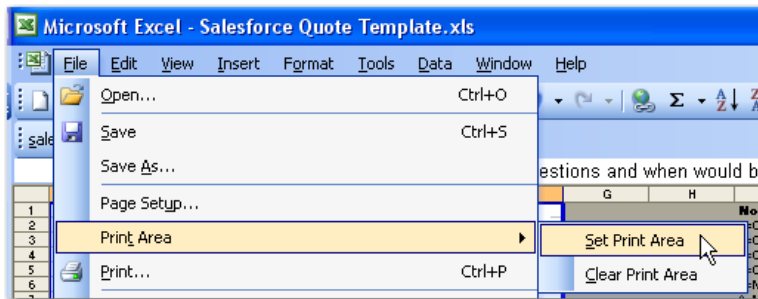
You can flag the portion of the spreadsheet you want to print. To identify the part of the spreadsheet currently specified to print, choose **View | Page Break Preview**.

To change the printable area:

1. Select the portion of the spreadsheet that should print using your mouse.
2. To set the printable area to the selected cells:

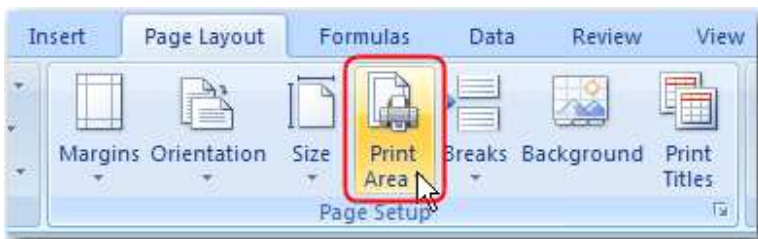
Word 2003:

Choose **File | Print Area | Set Print Area**.



Word 2007:

On the **Page Layout | Print Area**, and then click **Set Print Area**.

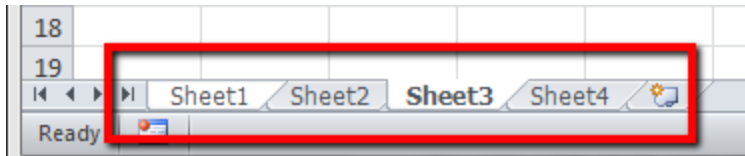


3. Choose **View | Normal** to return to the previous view mode.

➤ ***How can I determine which sheets to include in an output PDF?***

You can control which sheets are included in an output PDF from a Conga Excel template. To do so, **select the sheets you want included by holding the Ctrl key and clicking on each desired sheet.**

Excel will highlight the “selected” sheets in white, while the non-selected sheets will remain with a gray background.



In this example, “Sheet1” and “Sheet3” are selected and would be the sheets included in a PDF generated from this template.

➤ **What's the best way to format text paragraphs?**

Conga Composer cannot dynamically increase row height to accommodate multiple lines of text. For this reason, it is usually helpful to merge (not *mail* merge, just *merge*) a number of rows sufficient to your needs (**Format Cells | Alignment Tab | Merge cells**), leaving unmerged rows to the right or left that will preserve the height of the merged area after Salesforce field content is merged.

23							
24	Thank you for taking the time to meet with &=Org.Org_Name and to learn how our solutions can						Cells preserved
25	meet your organization's needs. As promised, I have put together a quote covering the products						
26	and services that we discussed during our recent meeting.						
27							

Here is the formula used in the cell above:

```
=CONCATENATE("Thank you for taking the time to meet with ", A7, " and to learn how our solutions can meet your organization's needs. As promised, I have put together a quote covering the products and services that we discussed during our recent meeting.")
```

➤ **How can I group data in Excel?**

You can group and subtotal columns of merged data using the "Group" and "Subtotal" parameters (see list of parameters above).

In the following example, we'll demonstrate how to group and subtotal Opportunity Line Items by Product Family.

➤ **Step 1: Non-Grouped Template**

Start with a simple template that displays the non-grouped data.

Template:

&=Master.ACCOUNT_NAME		
&=Master.MailingCity		
Product Family	Product Name	Total Price
&=OppLineItems.Product_Family	&=OppLineItems.OPP ORTUNITY_LINEITEM_ PRODUCTNAME	&=OppLineItems.OPPORTUNITY_ LINEITEM_TOTALPRICE
		0

Output:

Mini Pharma's Revenge		
Aspen		
Product Family	Product Name	Total Price
Products	PharmaNow CRM	-17,160
Products	Conga Courier	1,800
Products	German Recycle Truck	10,000
Products	German Recycle Truck	10,000
Services	Conga Merge Service	800
Services	Courier Services	770
Services	PharmaNow Services	1,680
Training	Conga Merge	6,950
Training	Conga Courier Point	2,385
		17,225

➤ **Step 2: Group by Product Family**

Next, modify the merge field that represents the Product Family. Add the parameter to group on that field and to skip a row between Product Family values to make room for a subtotal (in a subsequent step).

Template:

Product Family	Product Name	Total Price
&=OppLineItems.Product_Family(Group:Merge, Skip:1)	&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME	&=OppLineItems.OPPORTUNITY_LINEITEM_TOTALPRICE
		0

Output:

Product Family	Product Name	Total Price
Mini Pharma's		
Aspen		
Products	PharmaNow CRM	-17,160
	Conga Courier	1,800
	German Recycle Truck	10,000
	German Recycle Truck	10,000
Services	Conga Merge Service	800
	Courier Services	770
	PharmaNow Services	1,680
Training	Conga Merge	6,950
	Conga Courier Point	2,385

➤ **Step 3: Subtotal on Price**

Next, insert a formula to subtotal on Total Price.

Template:

	A	B	C	D
1	&=Master.ACCOUNT_NAME			
2	&=Master.MailingCity			
3				
4	Product Family	Product Name	Total Price	
5	&=OppLineItems.Product_Family(Group:Merge, Skip:1)	&=OppLineItems.OPPORTUNITY_LINEITEM_PRODUCTNAME	&=OppLineItems.OPPORTUNITY_LINEITEM_TOTALPRICE	
6		&=Subtotal9:OppLineItems.Product_Family		
7				

Tip! Using the SUBTOTAL9 function as depicted above will ensure each group maintains a subtotal and will prevent blank lines from appearing below the merge results.

Output (Notice each subtotal in **bold**):

	A	B	C
1	Mini Pharma's	Revenge	
2	Aspen		
3			
4	Product Family	Product Name	Total Price
5	Products	PharmaNow CRM	-17,160
6		Conga Courier	1,800
7		German Recycle Truck	10,000
8		German Recycle Truck	10,000
9			4,640
10			
11	Services	Conga Merge Service	800
12		Courier Services	770
13		PharmaNow Services	1,680
14			3,250
15			
16	Training	Conga Merge	6,950
17		Conga Courier Point	2,385
18			9,335
19			

➤ **Step 4: Compute the Grand Total**

Finally, insert a formula to find the grand total of the Price column. Note: do not use the =SUM function to add this column, as it will include the subtotal values in the result. Instead, we'll include the Excel formula:

=SUBTOTAL(9, C5:C5)

We've also added a label for the total and formatted the values as currency (USD).

Template:

	A	B	C
1	&=Master.ACCOUNT_NAME	&=Master.MailingCity	
2			
3			
4	Product Family	Product Name	Total Price
5	&=OppLineItems.	&=OppLineItems.OPP	&=OppLineItems.OPPORTUNITY_
6		&=Subtotal9:OppLineItems.	Product Family
7	Grand Total		\$0
8			
9			

Output:

	A	B	C
1	Mini Pharma's	Revenge	
2	Aspen		
3			
4	Product Family	Product Name	Total Price
5	Products	PharmaNow CRM	-\$17,160
6		Conga Courier	\$1,800
7		German Recycle Truck	\$10,000
8		German Recycle Truck	\$10,000
9			\$4,640
10			
11	Services	Conga Merge Service	\$800
12		Courier Services	\$770
13		PharmaNow Services	\$1,680
14			\$3,250
15			
16	Training	Conga Merge	\$6,950
17		Conga Courier Point	\$2,385
18			\$9,335
19			
20		Grand Total	\$17,225
21			

Know Your Limits

While Conga Composer strives to provide 100% compatibility with Microsoft Excel based templates, from time to time we encounter customer solutions that do not function exactly as intended. We encourage you to test your Excel template with Conga Composer to ensure full compatibility.

Known Limitations

- Macros in Excel templates will not be executed upon merging. If the output file type is chosen as Excel, a user can manually execute the macros but Conga will not do so automatically in the merge process. If the output file type is chosen as PDF, the macros in the Excel template will not execute before conversion to PDF.
- The use of large exponential equations has inconsistent results. At this time Conga has not been able to isolate a particular "limit" with regard to the size and complexity of the formula that might result in error.
 - Example: =A5^(B5+C2)
- Some chart types when converting to PDF: We've found that some complex chart types revert to more simple versions when converting to PDF.
- We recommend saving your Excel template as .xls (rather than .xlsx) format to ensure the widest compatibility for end users.

Unsupported Features

- Array formulas
- Excel picklists
- Page breaks on an individual sheet
- Pivot tables
- XML Maps
- Conga Composer will not support any formula containing (but not limited to) the following functions (see table below):

ASC	CUBEMEMBERPROPERTY	JIS
BAHTTEXT	CUBERANKEDMEMBER	PHONETIC
CLEAN	CUBESET	REGISTER.ID
CALL	CUBESETCOUNT	RTD
CODE	CUBEVALUE	SQL.REQUEST
CUBEKPIMEMBER	EUROCONVERT	YIELD
CUBEMEMBER	INFO	YIELDDISC

General Conga Limits

Conga Composer® Limits – per Solution	
Queries	50
Reports	50
Lines of Data in a Report	1,500 Rows or 5 Mb/Merge
Dataset	25,000 rows
QVar	50 rows of data
Number of Templates per operation	10
Template Maximum Size	5 MB
Conga Query Limits	
Aggregate SOQL (SUM, COUNT, etc.)	Max of 200 category values
Conductor/Workflow Limits	
Conductor	50 records/Distributed max 500 records
Workflow	50/Day
Max emails allowed in Conductor	500
Browser URL Limits	
Internet Explorer	2,000 bytes (closer to 1,700 bytes in practice)
FireFox, Safari, Chrome	64,000 bytes