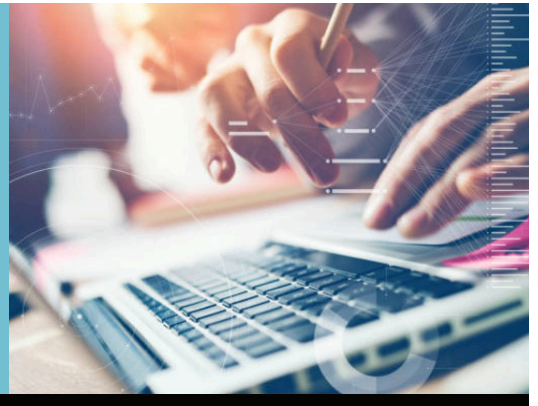




Conga for Financial Services

Create great client relationships while saving your team time and money



Your business is unique but the challenges you face are not. Too few resources, paper heavy processes that waste time on non-client related activities, error ridden client facing documentation that erodes brand integrity, lack of actionable insight into the data that drives your business. There is a better way.

Conga Composer optimizes your Salesforce investment by removing the roadblocks associated with document creation making it easy to create and deliver sophisticated robust documents including client portfolio reporting and trust documents by merging data from any standard or custom object into richly-formatted templates.

Conga has 10+ years of experience helping businesses optimize their Salesforce investment by simplifying business processes and increasing time to revenue with customized quotes, invoices, account plans, reports and more.

Put your Salesforce data to work

- Create and deliver sophisticated and robust documents from any standard or custom object by merging data into richly-formatted templates, including presentations, sales documentation and reports.
- Merge data from external data sources such as an ERP, homegrown data base, multiple Salesforce Organizations or call on Composer API.
- Customize, automate and standardize documents for many use cases and industries to decrease time to revenue, risk of user error, and time-intensive administrative tasks.
- Deploy flexible delivery options, with output files that can be downloaded locally, stored in Salesforce, distributed via email or integrated with eSignature.
- Automatically log activities, create follow-up tasks and even update fields with a click of a button.

- Protect brand integrity by eliminating hands-on tasks that introduce errors to customer facing documents.
- Embed automated, repeatable processes in Salesforce to increase record keeping, reduce administrative tasks and encourage user engagement.

“Their day is focused on client relationships so they can sit and spend more time with their client as opposed to sitting and spending more time generating documents.”

— **Kim Wargo**
Associate Vice President,
Salesforce Administrator
Finemark National Bank & Trust



Tackle unlimited use cases with a single application, increasing user adoption across your entire organization.

Included for both Business and Enterprise	Composer Business Edition	Composer Enterprise Edition	Benefits
Document Generation, Authentication and reporting	Included	Included	Generate enterprise-grade documents to address almost any use case Word, Excel®, PowerPoint®, PDF or HTML emails
Integration with Cloud Security Provider (CASB)		Included	Integration for 3rd party data encryptions CipherCloud and Perspecsys
Custom Branding of Composer's Interface		Included	Custom brand the Composer Interface with your logo to increase brand consistency and awareness
API		Included	<ul style="list-style-type: none"> Retrieve templates from any non-Salesforce application Create your own interface instead of downloading the Composer application
External Data		Included	Merge documents from multiple Salesforce orgs or external data bases such as an ERP, homegrown data base and more

Create

- Generate enterprise-grade documents to address almost any use case in Word, Excel, PowerPoint, PDF or HTML emails.
- Merge data from external data sources such as an ERP, homegrown data base, multiple Salesforce Organizations or call on Composer API.
- Incorporate professional, complex content such as tables, images, rich text, charts, dashboards, custom fonts, watermarks and global currencies.
- Conditionally display sections of a document, group data and calculate formulas according to business rules.

Automate

- Predefine options to run your solution in a single click.
- Log activities, save copies of output files and update fields in Salesforce.
- Trigger Conga Composer solutions with a Salesforce workflow rule.*
- Batch and schedule Conga Composer solutions.*

Distribute

- Distribute documents the way you want.
- Immediate local download.
- Store in Salesforce as attachments, Chatter Files or Content records.
- Include as attachments to richly-formatted Conga Email Templates.
- Send for eSignature with DocuSign® or Adobe® Sign
- Store in Google Drive or Microsoft OneDrive

Technical requirements

- Salesforce Professional, Enterprise, Unlimited, Performance and Developer Editions. We support Classic and Lightning.
- Supports Microsoft® Office 2016 and earlier for Word and Excel. For PowerPoint templates we support Adobe Reader and Adobe Acrobat. We do not support Adobe LiveCycle.
- Compatible with the latest version of Chrome, Firefox, and Safari for Mac. Internet Explorer 10 or newer.

About Conga

Conga® developed its suite of enterprise-grade applications to help businesses using the Salesforce Sales Cloud remove systems and process pain points and fill the gap in Salesforce out of the box. The Conga Suite, which includes Conga Composer—a top paid application on the AppExchange—simplifies and automates data, documents, contracts and reporting.

Conga Composer™

Conga Composer Create more efficiencies in your organization by optimizing Salesforce with the automation and simplification of enterprise-grade professional documents and reports.



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