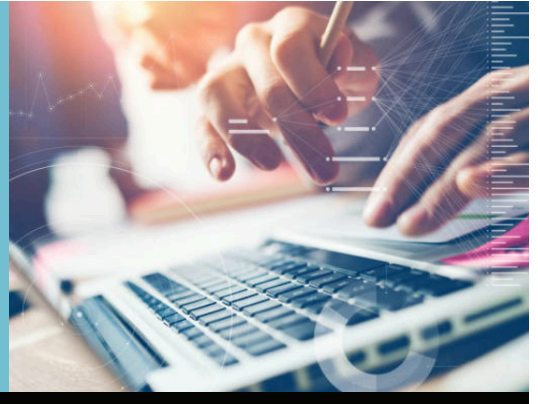




# Conga for Financial Services

Create great client relationships while saving your team time and money



Conga Contracts streamlines and accelerates contract negotiations without leaving Salesforce to ensure client communication is timely and error free. Give your team the power to build contracts from a library of clauses pre-approved by legal, so that legal maintains control over language without having to be involved in every client communication. Send contracts directly from Salesforce in Microsoft Word format for redlining, then compare versions and true-up validated changes directly in Salesforce, ensuring accurate data and a complete contract history.

Bridge the gap between sales and legal teams to drive business forward with:

- **Control.** Limit the clauses and language that can be included in outgoing contracts
- **Insight.** Report across contracts to identify and eliminate bottlenecks and uncover needed process improvements across your business
- **Speed.** Implement in as little as one week to gain value fast
- **Efficiency.** Shorten contract negotiations by as much as 50%

Conga Contracts integrates seamlessly into Salesforce — the platform your sales team already knows and uses — making it is business-ready more quickly than most CLM solutions. Typically, that means in a few weeks. In some cases, it means just days.

Conga Contracts bridges the gap between CPQ and eSignature, creating end-to-end contract automation with your existing solutions. Conga Contracts is ideal for common sales contract situations, including quotes, work orders, SOWs, Payment Terms, and many others.

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“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

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Feature	Description
Redlining	Negotiate contract terms in the format everyone is most comfortable with—Microsoft Word—while the Sales team tracks everything in Salesforce. Easily view and move from one redline to the next on platform and compare versions or even 'Edit Latest' in Word.
True-Up up-	Once negotiated changes have been accepted, True-Up to write that information back into Salesforce, keeping your system of record to-date for renewals and future contract generation.
3rd Party Contracts	Track and compare 3rd party contracts in Salesforce. Map data from a 3rd party contract to Salesforce fields for data reconciliation, and identify which clauses should be saved in the Salesforce Clause Library.
Recursive Merge	Customize your clause experience by merging a document with merged variables inside the clause.
Clause Library Library	Automatically build contracts using legal's pre-approved terms and conditions. When standard clauses are negotiated, the Clause manages copies for tracking revisions against specific contract instances.
Clause Playbook	Swap an existing contract clause with a pre-approved fallback clause without ever leaving Salesforce.
Clause Bundles	Easily define groups of terms and conditions that are commonly added to the same contract document, accelerating creation and eliminating errors. The Clause Library and Clause Bundle can be associated to any standard or custom object in your Salesforce Org.
Clause Families	Group and view the hierarchical relationship between related contracts and documents.
Content Capture	Highlight text in the Redlining UI to True-Up any data on the fly.
Support for Microsoft Word Content Control	Control what changes take place in a contract. Drop-down fields limit which terms can be changed.
Analytics	Report across contracts, gaining insights to identify trends and uncover bottlenecks.
Professional & Customized Contract Templates	Create highly-stylized, professional looking contracts with the click of a button.
Implementation Time	Full implementation in as little as a week.

## 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 Contracts™

**Conga Contracts** Accelerate and simplify your contract negotiations in Salesforce.



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