



Conga Grid

Manage Salesforce data easily



The real cost of inaccurate Salesforce data

What’s the worst thing about updating Salesforce data? Too many clicks that eat up too much time. But if your company’s data isn’t up to date, it affects everything, from the accuracy of the documents you create to pipeline prediction. Without clean data, you can’t get the insights that drive growth.

With Conga Grid, you can update Salesforce and fix data problems easily. Get a 360-degree view of your data to access the information you need on a single screen. Understand patterns and relationships to drive meaningful action. Save time on data tasks, improve adoption, and recover time for other work.

Challenges

- Difficulty, time, and effort of manually managing and navigating data
- Need to update multiple records at a time, across many tabs
- Manual work to relate information across multiple record tabs
- Lots of individual data entry
- Inaccurate data leading to lost opportunities

Key benefits

- Uncover insights that drive meaningful action
- Boost productivity with clicks saved
- Central view of the Salesforce data that’s relevant to you
- Intuitive, powerful, and user friendly, with pre-built grids for common uses to get you up and running fast

“ Using Conga Grid and Composer, Stan Johnson Company is increasing our productivity, cutting costs, and helping our brokers provide an exceptional experience for their clients. ”

Will Crowley, Manager, Information Systems | Stan Johnson Company

Save up to 50% of the time spent on manual data updates so you can focus on more strategic work

- **Create actionable data views on one screen:** Create views that pull all the relevant account information across multiple objects onto a single screen, cutting down on clicks. No need to even write a Salesforce report.
- **Built on Salesforce:** Update, filter, and sort data without having to leave Salesforce. Uses Salesforce roles and permissions to set parameters and access.
- **Reading pane:** Preview records, edit long text fields, and modify related lists from Grid's embedded reading pane.
- **Request actions on fields in columns:** Notify a user of activities and actionable items in your Grid. Communicate via Salesforce Chatter and track completion of actions.
- **Conditional formatting:** Highlight fields based on pre-set conditions to call attention and drive action.
- **Batch add and mass edit, or edit inline:** Update price books, permissions, or multiple fields of any kind at once. Bulk copy and paste data into and out of Salesforce. Or edit your fields inline on the same screen.
- **Quick start grids for common use cases:** Pre-built quick grids for out-of-the-box functionality that address common challenges for sales, case management, pipeline management, and Salesforce Administrators.



For More Information

Email info@conga.com or call your local Conga office to talk to an advisor.

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