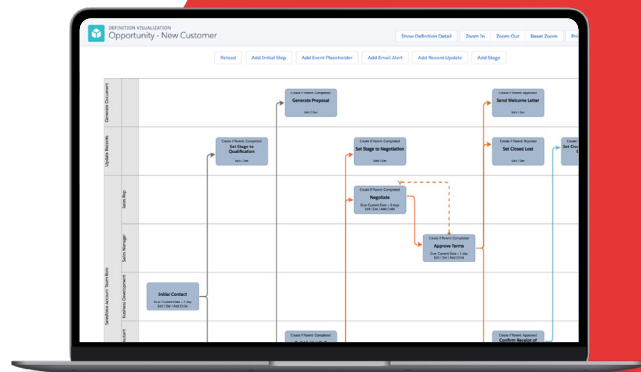


Conga Grid

Create, track, and manage your Salesforce data in one place



Conga Grid is a productivity tool within Salesforce that allows users to view, sort, and manage batches of data from a single screen. Cut down on clicks and switching between multiple screens while working through daily tasks by quickly finding and managing the information and insights you need.

Challenges

- Too much time is spent finding and updating records
- Data is stored in multiple locations, requiring navigation through different screens
- There are multiple ways to view and interact with data in standard Salesforce
- Growing data volumes creates a concern for keeping data clean
- Multiple people updating data in Salesforce simultaneously can cause confusion

Key benefits

- Manage pipeline with visibility and system-wide data insights
- Create meaningful and actionable views of your Salesforce data
- Reduce time wasted clicking through records—see them all in one place
- View and act on multiple layers of data on one screen
- Identify and address issues with data hygiene

Results achieved with Conga Grid

10X increase in productivity when in Salesforce

50% time Savings

100s of hours saved

Features

- **More productivity:** Do all your work from our grid—spend less time updating Salesforce and more time on core activities.
- **Data visibility:** Conga Grid empowers you to quickly navigate, visualize, and manage Salesforce data across multiple objects from a single grid.
- **Easy data updates:** Simplify data management for clean, accurate data using multi-tab grids, Excel-like inline editing, and mass updates.
- **Live Grid:** Receive notifications of field updates from others and get a live view of what teammates are viewing at that moment.
- **Reading page:** Use your reading pane to view and edit related records, visualize data, and collaborate with others.
- **Onboard quickly:** Get started immediately with our pre-built templates for different personas and choose your views of what information and data you want to live on Conga Grid.
- **Advanced insights:** Gain complete data visibility in a single view for analytics, better sales, and pipeline management.
- **Automate:** Conditionally format cells and rows that need action based on pre-set conditions, such as time-based or user-based actions.

Case Study: WRIGHTSON & PLATT London

Challenge

As a provider of high-cost, highly personalized products, Wrightson & Platt processes complex, nuanced orders. Data was an additional point of friction. Multiple related orders often exist under one master order number—for example, several sculptures, repeat orders, and jewelry, all from the same casting. While each was a separate opportunity in Salesforce, the sales team sometimes needed to update data across opportunities en masse, such as status or delivery date. Updating each component of related orders was time intensive and at times difficult to sort through.

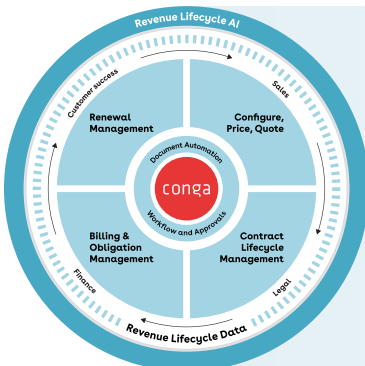
Solution

To streamline the process of updating data all at once, the team implemented Conga Grid. The sales team can now access and update customer order information from within one screen, instead of clicking back and forth through multiple related records. Staff now use a range of customized Grids to log the status of every individual order, depending on the materials in question. By creating a new set of production fields at the opportunity level, the company can track orders as they move through the production stages and are sent out to suppliers.

Results

By streamlining its data management and document production processes, Wrightson & Platt drastically improved efficiency, saving time by eliminating manual duplication of information while also preventing order errors.

- **Eliminated costly errors** due to time lost in having to redo orders and the price of materials and artisanal production.
- More timely, efficient and accurate order completion has allowed the company to **improve customer service**, an invaluable commodity for a luxury product brand.
- **Easy data management** and mass updating capabilities have also saved labor time, facilitated complex order data updates, and enabled accurate data reporting within Salesforce.



Today's leaders across departments have a unique opportunity to gain a Revenue Advantage, and achieving a Revenue Advantage requires a team effort. Conga's Revenue Lifecycle Management (RLM) platform combines Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities on a single open platform. Powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI to help companies address their most complex revenue-related contract questions.



For more information

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