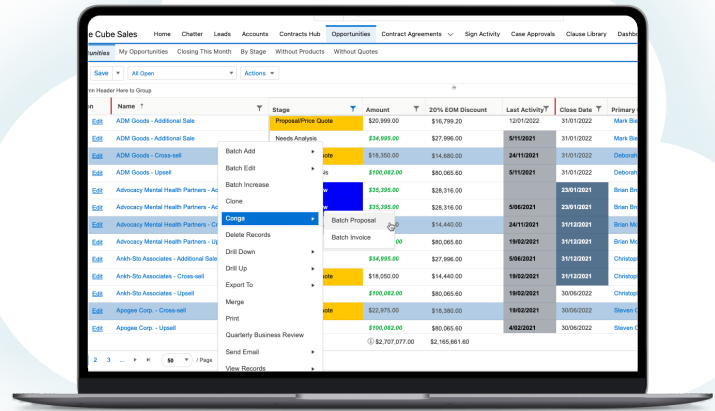# Conga Batch and Conga Trigger

Automate your Conga Composer documents

Conga Composer produces the templated documents you need to reduce document creation time and streamline the flow of data into your documents. Then take your processes to the next level by automating the delivery of those documents.

Conga Batch and Conga Trigger are add-on solutions for Conga Composer that enhance your document processes. Conga Batch creates and sends large numbers of documents all at once, reducing repetitive work. Conga Trigger boosts productivity and automates workflows by creating and delivering documents whenever your business criteria call for them. Together, they simplify everyday document tasks so you can focus on what's important.

Challenges

- Manually producing the same document for multiple accounts is repetitive and time-consuming.
- It's easy to forget to send a document after an important data update has been made.
- Scheduling a large number of documents for delivery at specific times is difficult and complex.
- Inputting data using copy and paste leaves too much room for error.

Key benefits

- Automate document production and delivery to save time and increase accuracy.
- Use Conga Batch to run the same Conga Composer solution for multiple records at once or at intervals, either scheduled or on-demand.
- Use Conga Trigger to activate individual Conga Composer solutions based on workflow rules. Automatically create and deliver documents any time.
- Distribute output as email attachments or links, eSignature documents, or CRM record attachments—or send to third-party file storage.

"Without the dramatic time savings achieved with Conga Composer, we would not have been able to get to a point where we can support 55,000 orphans worldwide."

Mohammed Zabhier | Business Systems Manager, Islamic Relief Worldwide

Features

Conga Batch:

- **Select records to batch:** Select ad hoc, choose from a list of records, or use queries to determine which records to use for document generation.

- **Download files:** Save time by running the same Conga Composer solution for multiple records at the same time.

- **Schedule on-demand:** Flexible scheduling options allow you to schedule distribution on-demand, by launching from a button on a list view, a page layout, or a Batch record. It can also run in the background at scheduled intervals, such as hourly, daily, weekly, or monthly.

Conga Trigger:

- **Automate workflows:** Eliminate the need to click the Conga Composer button every time you want to generate and send a document. Initiate a Conga Composer solution automatically when certain criteria are met.

Both:

- **Multiple formats:** Flexible distribution options allow you to use the solution in different scenarios for maximum value and productivity. Distribute documents as email attachments; eSignature documents; or Salesforce record attachments, Documents, Chatter posts, or Content records.
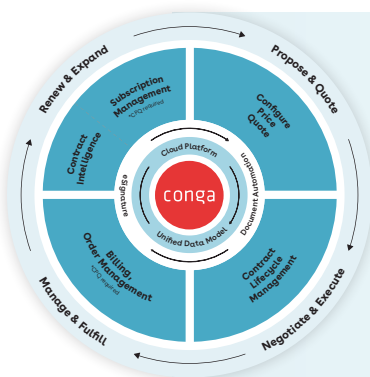
Case Study: CLARINS

Challenge
The Clarins training team delivers 16,000 to 20,000 training courses across the UK every year. Each training session requires data management related to attendees and venues, as well as the delivery of multiple documents. Generating and managing all the documentation required for these training sessions was complex and burdensome for the training team, in addition to being expensive.

Solution
Clarins implemented Conga Composer and Conga Batch to automate training documentation production and delivery. Reports are automatically delivered to venues hosting training events. Internal, cross-company reporting is automated as well. Training event attendee data can be updated in total or in custom groups using batch actions.

Results

- Error-free invitations delivered via customized, consistently branded templates

- Attendee reports automatically generated and sent to the venues hosting training sessions

- Conga solutions used throughout the course registration process for data, documents, and record management

Conga Batch and Conga Trigger are critical components of Conga's Revenue Lifecycle Cloud, a set of unified products built on the Conga Platform that enable you to crush your unique revenue lifecycle complexities and increase revenue certainty. Conga's open, flexible, and high-performance solution unifies, automates, and standardizes revenue processes across all teams to maximize customer lifetime value.

*Conga Batch and Conga Trigger can be used with the Conga Composer solution inside of Salesforce, to streamline document processes across the revenue lifecycle. Conga Batch and Conga Trigger use cases outside of Salesforce will be available in a future release.

For more information

Email info@conga.com or visit conga.com