



DATA SHEET

# Conga Contracts for Salesforce

Automate and simplify contract management



## Effective contract management to speed up agreement cycles

What better Salesforce contract management solution is there than one built specifically for Salesforce? Conga Contracts for Salesforce is used to automate, generate, and execute large volumes of contracts at scale—all within the interface you're already familiar with.

Standard, high-volume contracts must be executed the same way every time to reduce risk. This end-to-end solution allows you to create and execute contracts directly in Salesforce to simplify and accelerate sales cycles.

With the click of a button, a contract can be created, agreed to, and signed without any conversation or intervention by your team. If redlining and negotiation are needed, Conga Contracts for Salesforce provides legal-approved, sales-driven negotiations. This empowers sales to build and negotiate contracts themselves, streamlining the process for everyone.

The secure repository gives a holistic view into contract statuses and provides an audit trail to use when needed. Deals are closed faster, teams are more efficient, and the customer experience is enhanced with Conga Contracts for Salesforce.

“ Conga did not just fit Openpay today, but where we want to be in the future. Conga will have the ability to grow with us into new markets. ”

Amy Orfanidis | Growth Operations Manager, Openpay

## Challenges

- Inefficient, manual contract processes focus sales and legal teams on non-revenue generating activities
- Disjointed processes cause poor internal and external experiences
- Non-standard contract templates and language lead to risk and exposure
- Lack of an easy way to redline and negotiate when needed
- No central contract repository means documents can't be found when they are needed
- Lack of transparency in the contract process increases contract cycle times

## Key benefits

- Automate the entire process for large volumes of transactional contracts for faster time-to-revenue, while freeing up sales teams to sell new deals
- Ability to redline, negotiate, and amend contracts as an exception, not as a rule, provides guided flexibility
- Familiar user experience and setup using Salesforce leads to higher user adoption
- A central repository for all contracts means finding the documents you need every time
- Analytics track and improve the entire contract process
- Unlimited contract transactions mean no limit to how many documents you can automate

## Openpay's outcomes

**60%**

reduction in the contracting lifecycle timeline

**88%**

conversion rate for Conga contracts

**30%**

increase in contract volume



# Automate your contract process directly in Salesforce

Conga Contracts for Salesforce has the features you need to streamline contracting from start to finish.

## Contract creation

Automatically generate professional, accurate contract documents with a few simple clicks.

## Contract repository

Store, locate, and search all contracts. Enable standard and ad hoc reports on contract statuses and timelines, and access live overviews of contract activities.

## Alert notifications

Create and deliver alert notifications for every aspect of the contract management process, right from within Salesforce.

## Negotiation

On the occasion these contracts need negotiation, legal pre-approves the clauses and language for sales to use, while empowering them to build and negotiate standard contracts for faster negotiations without risk.

## Redlining and True-Up

View redlines and use True-Up to automatically update relevant document changes in Salesforce.

## Open in Microsoft Word

Make it easy to review and redline in a familiar format that you, or the other party, prefer.

## Clause library

Store commonly used clauses and alternates that are pre-approved by legal to speed up contract authoring and negotiations, while maintaining control.

## Clause playbook

Store alternate, pre-approved versions of commonly negotiated clauses in the Clause Library so your sales teams can keep negotiations moving.

## 3<sup>rd</sup> party contracts

Use AI and Machine Learning to ingest legacy and 3<sup>rd</sup> party contracts to uncover new insights. Track and compare 3<sup>rd</sup> party contracts, map the data to Salesforce fields for reconciliation, and identify which clauses should be saved in the clause library to manage risk and optimize revenue.

## Workflows and approvals

Automatically route tasks to appropriate parties and track their interaction and cycle times.

## eSignature integration

Use leading eSignature platforms, such as Conga Sign, for easy signing.



### For more information

Email [info@conga.com](mailto:info@conga.com) or call your local Conga office to talk to an advisor.

© Copyright 2021 8257\_1121

### Global offices

USA: +1 650 445 7700  
APAC: +61 2 8417 2399  
EMEA: +44 (0) 203 608 0165  
India: +91 740 591 2515

[conga.com](https://conga.com)