



DATA SHEET

# Conga X-Author for Excel

The complete Microsoft Excel solution for Salesforce



## Every year, companies lose an estimated \$15 million due to poor data quality

With X-Author for Excel, you can transform Microsoft Excel into a complete user interface for your Salesforce application, boosting CRM user adoption, and increasing user productivity. X-Author saves hours of administrative work by automating manual processes throughout your organization. It empowers users to add and update records for any number of objects from Excel while maintaining the permissions, rules, and security of your Salesforce system. X-Author gives you the ability to build and deploy productivity applications on a global scale, and even install ready-to-use and pre-designed applications.

### Challenges

- Slow data migration and risk of error
- Laborious processes and slow Salesforce adoption across teams
- Frequent errors caused by repetitive, manual data entry
- Legacy Excel processes delay production speed

### Key benefits

- Migrate data up to 80% faster
- Achieve 100% Salesforce user adoption and complete business tasks 10 times faster
- Manage any number of records and objects with one-click control
- Save time and effort with reusable templates

“ The process flows and the X-Author technology help bring the legal team into the ‘front office’ with the sales team like never before. ”

**Brian Lillie** | Chief Information Officer, Equinix

## X-Author has the capabilities you need to automate manual processes and save valuable time

- Create customizable experiences using new or existing workbooks
- Manage unlimited objects in any layout, any workbook, and across worksheets
- Update parent-child records on the same Excel row
- Create, read, update, and delete for an unlimited number of objects simultaneously
- Create data migration apps in minutes
- Compare data across orgs and instances in a single workbook
- Use any standard and custom fields as input for Excel calculations
- Initiate tasks from Salesforce UI or API
- Quickly create queries with point-and-click
- Leverage standard Excel reporting and analytics functionality
- Work offline and sync changes when reconnected
- Get started quickly with no programming required

## Real outcomes from Conga X-Author customers

**57%**

Faster programming

**51%**

Faster decision making

**48%**

Better data accuracy

**45%**

Faster business process cycle time

**39%**

Greater productivity

**34%**

Increase in Salesforce user adoption

Source: 2017 X-Author Customer Impact Study



### For More Information

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

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