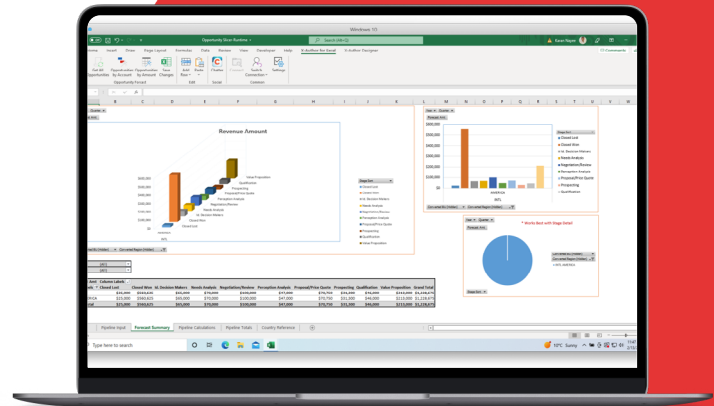# Conga X-Author for Excel

Turn Microsoft Excel into a complete user interface for your CRM system and increase user adoption

Conga X-Author for Excel transforms Microsoft Excel into an easy-to-operate user interface within Salesforce. X-Author for Excel empowers CRM users to add and update records for any number of objects from Excel while maintaining the permissions, rules, and security of your CRM system. Work with Salesforce in a familiar place with X-Author for Excel.

Challenges

- Calculating quotes in Excel, then needing to copy information over into CRM can cause duplicate work and lead to wasted time.

- Poor adoption rates can occur when seat-holders don't use Salesforce because it lacks the capabilities needed to generate complex quotes.

- Poor tracking abilities due to quoting being generated solely using Microsoft Excel.

- Without a CRM to increase transparency into quotes, rogue discounting can slip through the cracks, resulting in poor margins and revenue leakage.

Key benefits

- Improved CRM adoption and onboarding

- Easy migration of legacy data into your CRM

- Reduced CRM data administration needs

- Simplified custom coding and formulas

- Improved reporting capabilities

Results achieved with Conga X-Author for Excel

57% faster programming

48% better data accuracy

39% greater productivity

Features

- **Workbook creator:** Create customizable experiences using new or existing workbooks.
- **Multiple object management:** Manage unlimited objects in any layout, any workbook, and across worksheets.
- **Parent-child updates:** This feature makes it possible to update parent-child records in the same Excel row.
- **Mass updates:** Create, read, update, and delete an unlimited number of objects simultaneously.
- **Data migration:** This feature provides the ability to create data migration apps in minutes.
- **Quick queries:** Quickly create queries with point-and-click functionality.
- **Work offline:** This feature allows you to work offline and sync changes when reconnected.
- **Presto:** With a single click, you can calculate net present value (NPV), internal rate of return (IRR), profitability, or any other terms, and you can distribute one-click calculations. Presto is a type of application for use cases requiring remote execution of an app. The runtime user does not open Excel to work with this type of app.

Case Study: PayPal

Challenge

PayPal is an online payment platform that facilitates payments between individuals and businesses. The PayPal IT team needed a solution to support its Salesforce users in a broad range of functions.
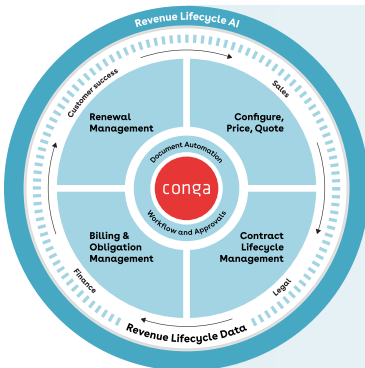
Solution

With Conga X-Author for Excel, PayPal found a solution to connect previously disjointed Microsoft Excel processes with Salesforce, so users no longer need to go back and forth between applications to input data.

Results

As a result, PayPal has improved usability and solved issues with adoption and management. "Working in Excel to collect information then going to Salesforce to do administrative work is unproductive. This marriage of Salesforce and Excel is a match made in Heaven."

- Chris O'Rourke, Director, EMEA Sales Operations @Paypal

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.

Conga X-Author for Excel can be used only inside of Salesforce to streamline data management across the revenue lifecycle.

For more information

Email info@conga.com or visit conga.com