Instructor-Led Training Offerings

Attend expert-led live training sessions on-site or remotely

Unlock the power of your Conga investment

Instructor-led training for administrators is critical for successful implementations. You will train with the guidance of Conga experts for over 20 different course offerings. Courses are a combination of instructor explanation, demonstration, hands-on activities and project work. Students practice in a training environment that they keep for 21 days. Many of our courses lead to certifications that require the passing of a certification exam and presentation of a project that mimics implementation requirements.

Private in-person onsite

Bring one of our expert trainers to your site to train your project team. Together the team will baseline, collaborate and be ready for project timelines. Private trainings command everyone's attention, allow company specific questions and team collaboration.

Private virtual

Virtually bring a project team together to baseline, collaborate and ensure timelines are met. Allows for remote team members and geographically disparate teams to collaborate and learn how to configure Conga capabilities.

Public virtual

Attend a virtual public course and learn how to best configure Conga products. Conga has a calendar of public courses offerings covering a variety of products and time zones.

"Instructor-led training is required to obtain certification and for administrators of CLM & CPQ."

Conga Learning Services email | Training@conga.com

CLM Courses using X-Author v.1

Course Name	Duration	Certification	Description
201 CLM: Essentials Admin	5-days	Yes	The course provides an overview of the complete Contract Lifecycle Management(CLM) process and is required for administrators to obtain a certification. Agreements, templates, versioning, clauses, scheduling, document assembly and other key functionalities are covered.
101 CLM: Basic Admin	4-hours	No	This course focuses on Contract Lifecycle Management (CLM). Students will gain a baseline understanding of the CLM architecture, lifecycle and terminology. Students will learn how to create and configure agreements, such as NDAs, SOWs and MSAs. Additional topics are using templates, writing queries, writing rules, applying conditional logic and using the wizards.
101 CLM: Template Admin	4-hours	No	This course focuses on streamlining your contract management process by teaching concepts and tasks necessary to use Conga's Template Administration feature. Students will learn how to maintain and manage agreements and clause templates. Students will practice creating and using templates.
101 CLM: Contract Negotiations	4-hours	No	Learn to manage the negotiation process and merge changes on an agreement document with a corresponding agreement record. Practice reconciling and redlining, use version control functionality, work with clauses, translate contracts and practice a variety of other tasks associated with negotiations.
102 CLM: Approvals	4-hours	No	Learn the approval process including working with actions, steps, submissions, rejections and specified entry criteria. Define approval rules using dimensions and conditions. Build approval processes and test those processes as an end-user. Learn advanced approval configuration
103 CLM: Usability Features	4-hours	No	Learn a variety of features that will enhance the end user's experience and mitigate errors. Configure document assembly rule processing, so the sequence of clauses and attachment insertions execute properly. Learn how to use the Intelligent Import for 3rd party paper that are used as the basis for contracts. Additionally, configure the comply system properties, go in-depth with smart fields and smart elements, practice configuring in the Admin Tab and performing post activation actions.

> CLM implementations require either one private class or one seat in a public class.

CLM Courses using X-Author v.2

X-Author v.2 requires Office 365

Course Name	Duration	Certification	Description
240 CLM: Administration	5-days	Yes	The course provides an overview of the complete Contract Lifecycle Management(CLM) process and is required to obtain a certification. Additionally, agreements, templates, versioning, clauses, scheduling, document assembly and other key functionalities are covered.
110 CLM: Basic Admin	4-hours	No	This course focuses on Contract Lifecycle Management (CLM). Students will gain a baseline understanding of the CLM architecture, lifecycle and terminology. Students will learn how to create and configure agreements, such as NDAs, SOWs and MSAs. Additional benefits include hands-on development using templates, writing queries, writing rules, applying conditional logic and using the wizards.
111 CLM: Template Admin	4-hours	No	This course focuses on streamlining your contract management process by teaching concepts and tasks necessary to use Conga's Template Administration feature. Students will learn how to maintain and manage agreements and clause templates. Students will practice creating and using templates in a Salesforce environment.
112 CLM: Contract Negotiations	4-hours	No	Learn to manage the negotiation process and merge changes on an agreement document with a corresponding agreement record. Practice reconciling and redlining, use version control functionality, work with clauses, translate contracts and practice a variety of other tasks associated with negotiations.
113 CLM: Usability Features	4-hours	No	Learn a variety of features that will enhance the end user's experience and mitigate errors. Configure document assembly rule processing, so the sequence of clauses and attachment insertions execute properly. Learn how to use the Intelligent Import for 3rd party paper that are used as the basis for contracts. Additionally, students will configure the comply system properties, as well as go in-depth with smart fields and smart elements, practice configuring in the Admin Tab and performing post activation actions.

CPQ Course Catalogue

Course Name	Duration	Certification	Description
201 CPQ: Product Admin I	5-days	Yes	You will learn the foundations of Configure-Price-Quote (CPQ) with Conga. This is the first level of Conga CPQ. You will learn how to setup products, categories price lists, bundling, defining attributes, rules, quote collaboration and more. This hands-on course is an absolute must for team members implementing Conga CPQ.
202 CPQ: Product Admin II	5-days	Yes	You will become expert in product pricing, automation, creating logic for the price values. You will configure asset-based ordering, opportunity-based auto renewal quoting, advanced pricing configuration, approval processing and deal maximizer. Earning the Level II CPQ certification demonstrates an advanced skill-set. You cannot take this course until you have achieved the **CQP 201 Product Admin I** certification.
101 CPQ: Basic Admin	4-hours	No	For Configuration Engineers, Solution Architects, and System Administrators to learn features to consider when implementing a CPQ solution. Review common use cases, configuring products and prices, structuring a product catalog, making products configurable, and automating product selection.
101 CPQ: Template Admin	4-hours	No	For Sales and Legal professionals to learn how quote/proposal templates are created, customized, and tested using X-Author Contracts. Gives administrators, developers and specialists a foundational understanding of functionality before implementation.
102 CPQ: Approvals	4-hours	No	Learn how to configure approvals, differentiate between Salesforce & Conga approvals and build approval logic.
102 CPQ: Pricing Configuration	4-hours	No	Learn how to configure pricing, create price matrices, rules, adjustments and conditional pricing. Quote and see how pricing configuration impacts pricing.
103 CPQ: Usability	4-hours	No	Developers and Implementors explore methods to improve the product selection and user experience within Conga CPQ.
111 CPQ: Asset Based Ordering	4-hours	No	Learn the relevant aspects of Asset Based Ordering (ABO). Learn the basic ABO flow from Line Items in a Quote/Proposal to an Order through Asset creation. Also learn how the ABO process manages subscription-based assets including how to amend, renew and terminate.
112 CPQ: Pricing Configuration II	4-hours	No	Learn to address advanced pricing use cases that businesses may encounter when working or negotiating with their customers.
113 CPQ: Numeric Expressions	4-hours	No	Developers learn syntax to write expressions and attributes that automate and perform calculations.

> " CPQ Product Administrators have 2 classes they should take to master CPQ "

Billing, Contracts, Composer, Grid, Sign & X-Author

Course Name	Duration	Certification	Description
201 Billing: Management Essentials	2-days	Yes	Learn high-level Billing concepts, objects, capabilities and data model. Students will configure out-of-the box billing features for settings such as payment terms, invoices, schedules and billing plans. Students will configure billing for subscription and usage-based products, as well as produce accurate invoices and credit memos. They will change and renew assets and see how billing schedules are impacted.
201 CFS: Contracts for Salesforce Administration	4-days	Yes	Learn about contract management objects and each stage of the contract lifecycle. Learn how to automate aspects of the Conga Contracts for the Salesforce repository. This course also covers using Conga Composer to configure conditions, queries and templates
CC 210: Conga Contracts	3-days	Yes	Learn about contract management objects and each stage of the contract lifecycle. Learn how to automate aspects of the Conga Contracts.
CM201: Conga Composer Administration	3-days	Yes	Learn how to setup Composer, Sign and Batch. Learn to use pre-built solutions Automation Wizards, the Solution Manager and Manual buttons. Learn how to build a quote solution by inserting tables, queries, behaviors and configuring Conga Sign. Additionally, learn how to configure an Invoice Solution using Composer email template, components in the solution manager and configure Batch to send out bulk invoices.
CG 201: Conga Grid	2-days	Yes	Learn multiple ways to interact and view Salesforce data. Learn to increase productivity and efficiency by creating Grids for Account and Case data. Configure grids, learn filtering capabilities, sorting and editing batches of data, replace a related list with a Grid and create a Sales Hub using Multi-Tabular Grid. Learn to use Grid to identify and address data hygiene issues effectively and quickly.
CS 201: Conga Sign Administration	2-day	Yes	Students will learn how to configure the Conga sign button in any object, as well as configure parameters to customize behaviors. The process of pre-tagging documents for eSignature, as well as format the tagging will be covered. Students will learn how to configure for 2 recipient signers and serial routing. The course also covers supported language functionality, uploading signatures and initial images, performing audit trails, utilize signature validity and run out of the box reports.
101 X-Author for Excel	4-hours	No	This 4-hour course teaches how X-Author for Excel can be used as an alternative user interface for Salesforce. X-Author for Excel allows users to work in Excel but with Salesforce data and governance. This course includes a basic Salesforce overview, application template development using X-Author Designer, usage of the Excel ribbons and application template development using Runtime products.