



DATA SHEET

Conga Batch and Conga Trigger

Automate your Composer documents



Let Batch and Trigger do the work for you

Conga Composer produces the templated documents you need, reduces the time needed to produce them, and streamlines the flow of data into your documents. Now take your processes to the next level by automating the delivery of those documents.

Batch and Trigger are Composer add-on solutions that enhance your document processes. Batch creates and sends large numbers of documents all at once, reducing repetitive work. 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 manually 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, saving you time and increasing accuracy
- Use Batch to run the same Composer solution for multiple records at once or at intervals, either scheduled or on-demand
- Use Trigger to kick off individual Composer solutions based on workflow rules to automatically create and deliver documents any time, so you don't have to (and don't forget to)
- Distribute output as email attachments or links, eSignature documents, CRM record attachments, or 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

Using Conga Batch, Clarins eliminated 30 manual touchpoints within their training program, resulting in significant time and cost savings.

Get the most out of your Composer solution with Batch and Trigger.

Batch

- **Select records to batch:** Select ad hoc, from a list of records, or use queries to determine which records to use for document generation. Use the solution to group records manually or run a regular report to find all records of a given type.
- **Download files:** Save time by running the same Composer solution for multiple records at the same time. Consolidate records for immediate download as a PDF or .zip file.
- **On-demand scheduling:** Flexible scheduling options allow you to schedule distribution on-demand, launching from a button on a list view, a page layout, or a Batch record. You can also run Batch in the background at scheduled intervals, such as hourly, daily, weekly, or monthly.
- **Batch use case examples:** Invoices, renewal quotes, reminder emails, year-end tax forms, event registration, marketing collateral, NDAs, contracts, and more.

Trigger

- **Automate workflows:** Eliminate the need to click the Composer button every time you need to generate and send a document. Initiate a Composer solution automatically when certain criteria are met.
- **Trigger use case examples:** Billing, invoices, renewals, proposals, welcome letter, and other time-sensitive or highly regulated documents.

Both

- **Multiple formats:** Flexible distribution options allow you to use the solution in different scenarios for maximum value and productivity.
- **Distribution format examples:** Email attachments; Salesforce record attachments, Documents, Chatter posts, or Content records; or eSignature documents.



For more information

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