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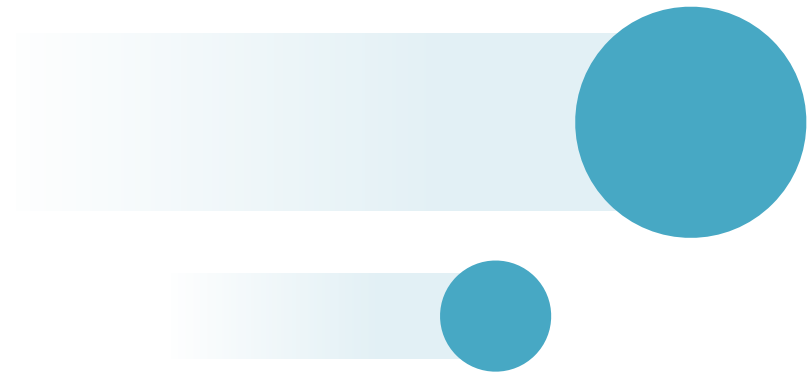# 4 key features for fast, secure document generation

How to easily determine what document generation solution best suits your organization

Introduction

Is your documentation workflow bogged down by human error, inconsistencies, and bottlenecks? Outdated, tedious, and paper-heavy processes require manual copying and pasting and make creating documents a constant struggle. Document generation software can transform how you do business with its ability to improve accuracy, streamline processes, and offer a more consistent customer experience. But which document generation software solution is best for you and your business?

With a robust document generation tool, you should be able to make game-changing improvements to your operations, including:

- Eliminating errors by increasing accuracy, consistency, and streamlining document creation

- Creating consistency to protect your brand and corporate messaging

- Shortening turnaround times to reduce costs and increase operational efficiency

But as you evaluate your options, understand that a document generation tool will play an essential role in every stage of the revenue lifecycle. From proposals and contracts to billing and renewals, accurate documents are essential throughout the revenue lifecycle. Therefore, finding a solution that precisely fits your business' needs is imperative.

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4 Essential document generation features

As you consider different vendors, software, and processes, use this guide to ensure you get what you need most out of a document generation system.

1

Unlimited document formats for unlimited use cases

- Generate documents for any use case, from proposals and quotes to invoices and renewal contracts, with multiple template formats, including .docx, .xlsx, .pptx, .pdf, and HTML emails.

- Create tables, images, rich text, charts, dashboards, custom fonts, watermarks, dynamic formulas, and global currencies. Plus, conditionally display document sections, group data, and calculate formulas according to business rules.

- Produce unlimited business-critical documents without going over defined document generation limits.

2

Data merge capabilities from multiple input systems

- Store data in various places within Salesforce based on your company's needs. Merge data directly into your documents from standard and custom objects in Salesforce or data from other leading CRMs.

- Get the correct data into the right template. After all, not all data lives in Salesforce and you need to be able to merge data from external databases, too.

3

Automation to simplify workflows

- Look for tools that allow you to consolidate, schedule, and deliver documents you create automatically or on demand. Some documents are time-dependent, and companies can be penalized for not sending them. Or maybe you're working on a batch of documents all at once.

- Seek out features like customizable workflow rules that can help you create and deliver your documents to ensure they get where they need to go when they need to get there without manual intervention.

4

System security

- Look for providers that prioritize security. Ensure they are dedicated to the best practices, security, privacy, and compliance of HIPAA, GDPR, SOC 2, and more. Your document generation software must help you meet a multitude of compliance, data protection, and regulatory obligations.

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Conga Composer:

The ultimate document generation software

With Conga, your business needs come first.

Conga Composer allows you to easily and accurately create the unlimited number of documents your company needs. After all, **who has time to monitor document generation limits?** With our per-license model, admins can create as many templates as needed, and users can generate as many documents as needed without additional charges per document.

Composer handles the most complex use cases, including complicated proposals, invoices, audit reports, shipping, and more. When it comes to templates, formatting, and data gathering, you can use tables, images, rich text, charts, dashboards, custom fonts, watermarks, dynamic formulas, and global currencies. **Don't waste time with a solution that can only handle a select set of document requirements.** You need something that can handle it all. You can use Composer to create accurate digital documents that are consistent and personalized to elevate your brand and delight your customers.

These features are just some of the reasons why Composer is the #1 most popular document generation app on Salesforce AppExchange—and has a 5-star rating.

Some other Composer features our customers love:

- Provides instant document notifications to alert necessary parties of important changes.

- Tracks document history to keep everyone on the same page.

- Offers workflow automation functionality.

- Reduces errors by merging data directly from Salesforce and other external sources into your documents.

- Pulls data from multiple systems to avoid data conflicts and silos.

- Ensures you meet compliance, data protection, and regulatory obligations with our SOC 2-certified, GDPR, and HIPPA compliance tool.

- Work with one of the only members of the Cloud Security Alliance in the document generation space.

Conga Composer in action

Conga has the most complete document generation suite and streamlines processes for businesses of all shapes, sizes, and industries.

Conga customers saw:

80% less time spent updating documents manually

160k+ hours saved annually

$350M dollars generated in quotes

12x faster detailed quote generation

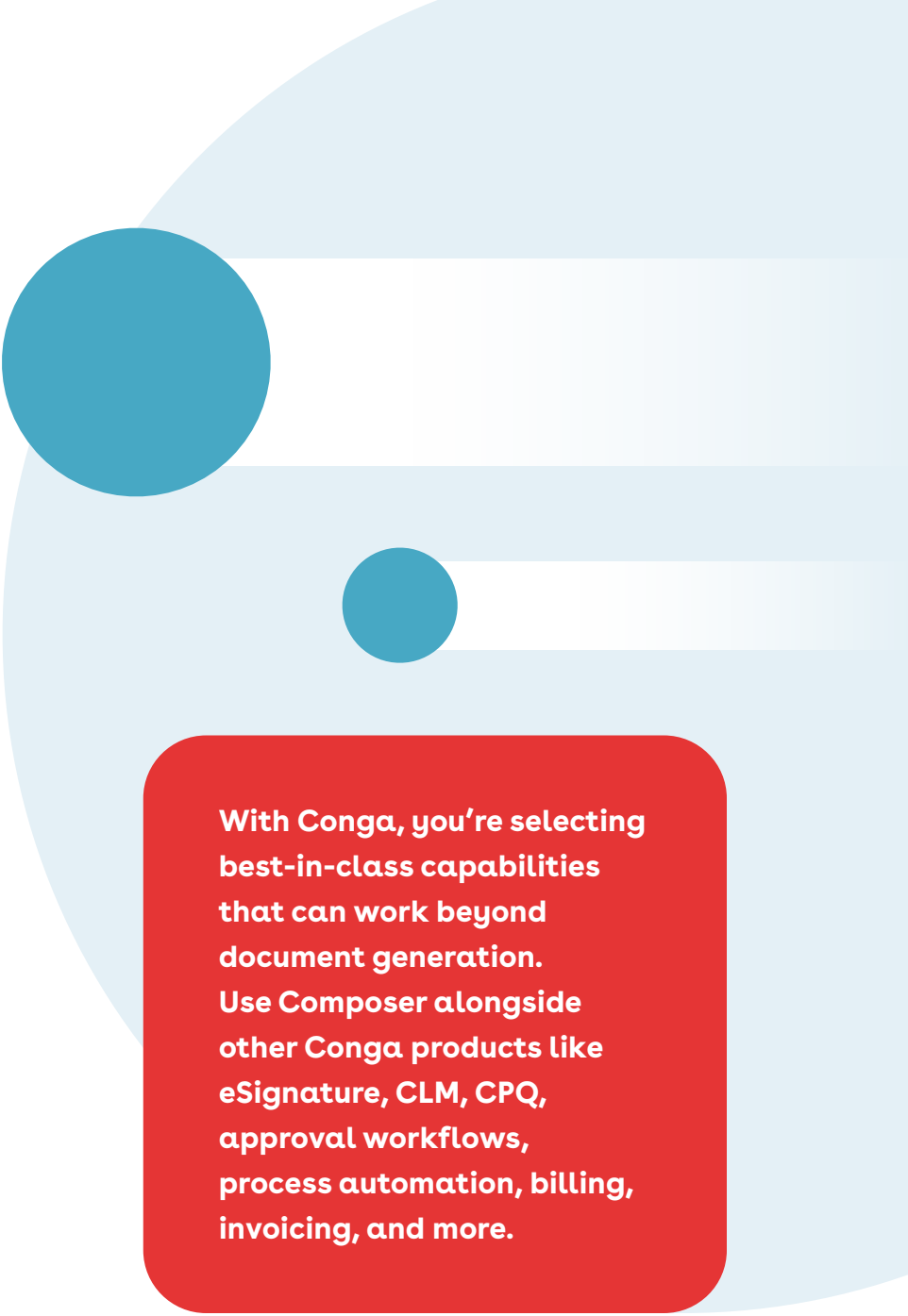**55** working days saved by reducing document creation time

60x faster grant agreement generation

Each stage of revenue lifecycle management requires customized documents, from proposals and quotes to contracts and renewals. Simply put, Composer allows you to merge data from Salesforce, or other systems of record, into document templates while delivering organizational productivity, accuracy, consistency, and exceptional customer experience.

Start creating on-brand, accurate documents for every step of the customer's journey with Composer.

Book a demo

With Conga, you're selecting best-in-class capabilities that can work beyond document generation. Use Composer alongside other Conga products like eSignature, CLM, CPQ, approval workflows, process automation, billing, invoicing, and more.

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About Conga

Conga, the Revenue Company, is the pioneer and market leader in Revenue Lifecycle Management. Its platform is chosen by the world's growth champions to accelerate the end-to-end revenue lifecycle and achieve a Revenue Advantage. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Conga is born for the top line—powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI—to help companies grow, protect, and expand their revenue.

Conga delivers a Revenue Advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, CO and has offices across the United States, India, and Ireland. Visit conga.com for more information.