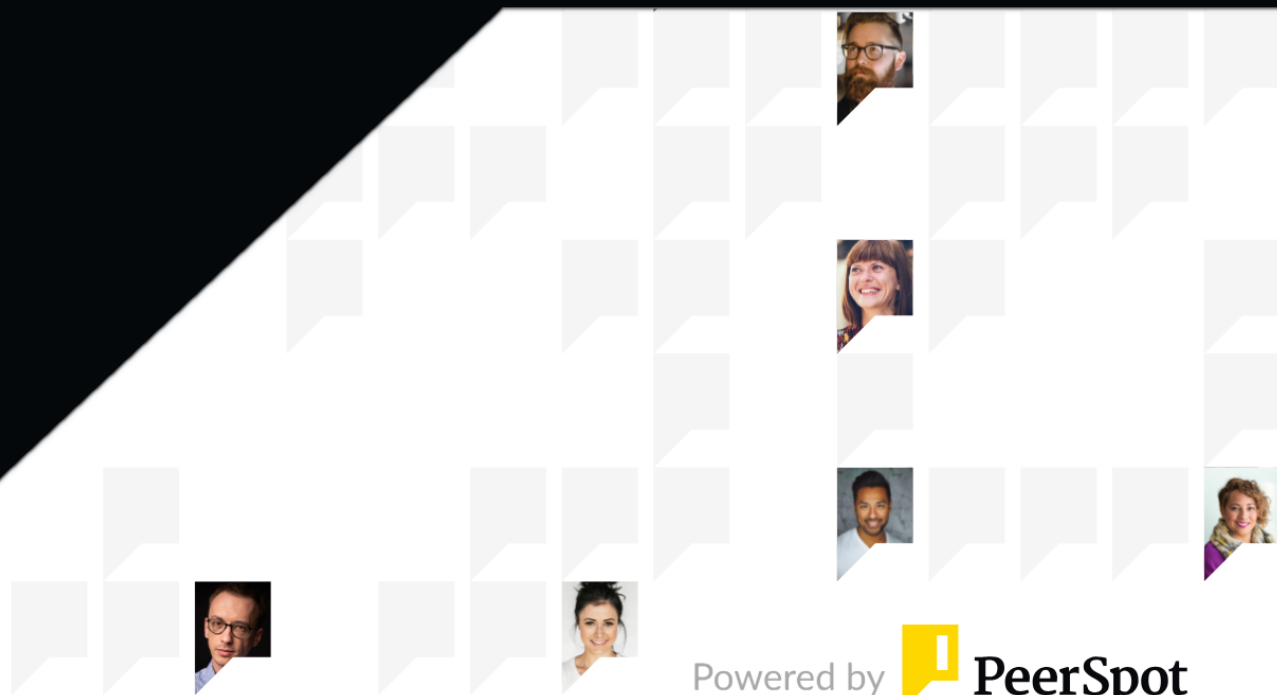




Conga Composer

Reviews, tips, and advice from real users



Powered by  **PeerSpot**

Contents

Product Recap..... 3 - 4

Valuable Features..... 5 - 11

Other Solutions Considered..... 12 - 14

ROI..... 15

Use Case..... 16 - 20

Setup..... 21 - 23

Customer Service and Support..... 24 - 25

Other Advice..... 26 - 30

Trends..... 31 - 32

About PeerSpot..... 33 - 34

Product Recap



Conga Composer

Conga Composer Recap

Conga Composer offers a powerful document generation tool with seamless Salesforce integration and dynamic data merging, allowing users to create customized templates for efficient workflows.

Featuring an intuitive interface, Conga Composer streamlines document creation through automation, reducing manual tasks and enhancing accuracy. Integrating with Salesforce, it supports dynamic data merging and customizable templates for Word and Excel. E-signature incorporation and multilingual support provide added functionality. Despite its capabilities, users note concerns over cost, documentation depth, and integration challenges beyond Salesforce. Improvements in template management, user guidance, and debugging support could enhance its usability.

What are the key features?

- **Intuitive Interface:** User-friendly design simplifies document creation.
- **Seamless Salesforce Integration:** Allows for smooth data merging and document generation within Salesforce.
- **Customizable Templates:** Provides flexibility with Word and Excel templates.
- **Automation:** Reduces manual tasks and enhances accuracy in workflows.
- **E-signature Support:** Facilitates digital signing processes.
- **Multilingual Functionality:** Supports multiple languages for broad applicability.

What benefits and ROI should users look for?

- **Increased Efficiency:** Automation and dynamic data merging enhance productivity.
- **Improved Accuracy:** Reduces errors in document creation with customizable templates.
- **Streamlined Workflows:** Simplifies processes through integration with platforms like Salesforce.
- **Enhanced Functionality:** Offers flexibility with e-signatures and multilingual support.

Conga Composer is widely applied in sectors like healthcare and finance, automating document creation for invoices, proposals, and reports. It integrates seamlessly with DocuSign for e-signatures, focusing on improving document accuracy and customization for different applications.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“In my 2.5 years of experience with Conga Composer, I can say that it was one of the best document generation tools that I have used in a very long time.”



Skumar Skumar

Salesforce Application Support Specialist at Vectra AI



“The main benefits I have seen from using Conga Composer are that while Salesforce provides features to build documents or cases that function as quote summaries, they have limitations, and after choosing Conga, we discovered that it already has many features that enable us to easily build complex templates and it works perfectly with our business use cases, which is why we selected it.”



Renu Soni

Senior Salesforce Developer at Minlopro Partners



“Conga Composer helps to create documents faster and saves time.”



Karthik Raj S

Consultant at AblyPro

- ✓ “As an implementer, what stands out for me is that I've been on it for more than ten years now, so I kind of saw some change in the UI, and it's very nice.”



Verified user

Salesforce Specialist at a financial services firm with 5,001-10,000 employees

- ✓ “Conga Composer is easy to use, especially for C-level executives, as it simplifies the contract signing process.”



Praveen Umapathy

Sr Salesforce Developer at a tech services company with 501-1,000 employees

- ✓ “Using Conga Composer helps us send proposals much faster—within minutes instead of hours—thus improving our sales cycle by roughly twenty to thirty percent.”



Verified user

Product owner at a tech vendor with 51-200 employees

- ✓ “I have never faced any issues with stability.”



Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

What users had to say about valuable features:

“Conga Composer allows dynamic integration with Word and Excel templates, and conversion to PDF is seamless.

Mapping fields from Salesforce to templates is straightforward, providing flexibility to include elements like images and headers.

The ease of querying and mapping data using Conga queries, solutions, and templates stands out the most..”

Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

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“Conga Composer offers plenty of features, including one-click document generation, template-driven automation, and dynamic data merging.

If I had to pick one feature that makes the biggest difference day to day, it would be dynamic data merging in combination with Salesforce. This feature actually drives everything else and matters the most because it eliminates manual work completely, ensures accuracy, and enables true personalization at scale. When you have fifty proposals a day, each one should be customized.

Conga Composer has impacted our organization in a quite positive manner. We have saved a significant amount of time, closed deals faster, and improved accuracy. We can now maintain all the proposals we currently have in the system using standardized templates..”

Verified user

Product owner at a tech vendor with 51-200 employees

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“What I appreciate about Conga Composer is that it lets you customize it. You can customize and add colors. There are a lot of features. I can download to my OneDrive, Google Drive, or anywhere I can save it. If I want to change any fields on my Conga template, I can go and change it in the query. It helps me quickly update it. That is an easy part of using Conga Composer.

We utilize Conga Composer's dynamic data feature.

Conga Composer helps to create documents faster and saves time.

I think Conga Composer is good for ensuring brand consistency in our documents. There have been no issues until now. We are using it easily..”

Karthik Raj S

Consultant at AblyPro

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“The best features in Conga Composer are how we navigate the merge fields and merge objects. We can retrieve data and display it on the templates, which is a strong aspect of Conga Composer and why we chose it to build documents.

Dynamic data is a feature of Conga Composer that allows us to bring data from different objects and display it on the templates. This capability is particularly valuable.

The main benefits I have seen from using Conga Composer are that while Salesforce provides features to build documents or cases that function as quote summaries, they have limitations. We cannot modify much or build complex templates using the standard features. After choosing Conga, we discovered that it already has many features that enable us to easily build complex templates. It works perfectly with our business use cases, which is why we selected it. .”

Renu Soni

Senior Salesforce Developer at Minlopro Partners

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“I would say the process of setting up those templates for different quote stages with Conga Composer is extremely easy. You do not need a lot of development knowledge for that. Even if you are just proficient with Microsoft Word, then you can definitely go ahead and customize this according to your needs. It's very simple and very straightforward. In my 2.5 years of experience with Conga Composer, I can say that it was one of the best document generation tools that I have used in a very long time. For maintenance purposes, it's very easy to maintain the existing templates or to create new ones.

Conga Composer has positively impacted my organization, and I have noticed improvements in efficiency, accuracy, and customer satisfaction since using it. Earlier, we used to generate all these documents with the native CPQ functionality that allows you to create templates and generate documents via Visualforce. Those were difficult to maintain because you needed to check the tables and manually enter width and height. They were not very easy or friendly to configure and maintain. With the introduction of Conga Composer, we see a lot of changes on a day-to-day basis. There are a lot of requests to customize our templates, and we can meet those customization requests very easily. It offers greater flexibility in terms of formatting and the data we want to show to our customers. This is where it plays a major role, so there has been a lot of improvement, and the efficiency has also improved..”

Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

[Read full review](#) 

“As an implementer, what stands out for me is that I've been on it for more than ten years now, so I kind of saw some change in the UI, and it's very nice. It's user-friendly, I will say that in IT, it's user-friendly. The documentation is pretty good actually, so you can find easily what you are looking for. I also like the fact there is Conga University where you can do things and get certified, which reminds me that maybe I should go update my certification.

“In terms as an implementer, it's user-friendly, documentation is good, and help is also good. I have good contact with Conga people throughout the years, and it's good. It helps a lot because when you use a template, you don't have to do manual work. You have merge fields, and when you use a template, you can use merge fields, and that's great because that's why you're using a template. If you use a button for the user, again, it helps. If you use automation too, you have a trigger point that helps you send everything, generate the document, and do other things.

“Conga Composer is not especially something new; back then, Conga Composer was very something new for me, and I really liked the Conga Composer product. Today, I don't know if they are still ahead compared to some competitors, but at some point I feel like automation is basically made to make the work faster and easier for everyone, and that is not specific to Conga Composer..”

Verified user

[Read full review](#) 

Salesforce Specialist at a financial services firm with 5,001-10,000 employees

Other Solutions Considered

“In my new firm, the client is not using Conga Composer and is instead relying on Visualforce pages for dynamic document generation, which is much more complex..”

Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

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“Before choosing Conga Composer, we evaluated DocuSign. However, there were internal questions about whether the initial setup and long-term maintainability would be as easy as with Conga Composer, leading us to decide to go with Conga Composer instead..”

Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

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“As I mentioned earlier, we used to use CPQ quote document functionality, which was native and free with the Revenue Cloud. However, it was not very easy to maintain, requiring developers to create and maintain those templates, which lacked flexibility compared to Conga Composer. Seeing those challenges and the need for more customization, we opted for Conga Composer..”

Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

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“In comparison to DocuSign and CPQ, Conga Composer has some advantages. It supports various formats like Excel, PowerPoint, and Word, which DocuSign does not. Conga Composer also offers advanced automations and dynamic template selections, which are not available in DocuSign. Additionally, it allows table formatting on templates, whereas DocuSign does not..”

Shlesha Ramteke

Associate Technical Consultant at Blueflame Labs

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“Before choosing Conga Composer, we evaluated a few other document generation and e-signature solutions, including DocuSign, which was strong in e-signatures but lacks the document generation capabilities or flexibility that Conga Composer offers for our use case. We also evaluated PandaDoc..”

Verified user

Product owner at a tech vendor with 51-200 employees

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ROI

Real user quotes about their ROI:

“Despite being expensive, Conga Composer is worth the investment and provides a good return on investment. It significantly simplifies the process of generating documents..”

Verified user

Salesforce Specialist at a financial services firm with 5,001-10,000 employees

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“It is clear that we have seen a return on investment from using Conga Composer. It has reduced document generation time from around ten to fifteen minutes to under twenty seconds, translating to about three to four hours saved per sales rep per day. At a team level, that is equivalent to the workload of one to two full-time employees. Using Conga Composer helps us send proposals much faster—within minutes instead of hours—thus improving our sales cycle by roughly twenty to thirty percent. Overall, it allows us to scale operations without increasing headcount..”

Verified user

Product owner at a tech vendor with 51-200 employees

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Use Case

“I use Conga Composer to generate email and invoices. Then we download it and send it to customers. That is the main part.

Right now the main benefits I have seen from using Conga Composer is that it is easy to customize. However, we wish we could have some AI features in Conga. That would help us to create Conga templates or anything a little faster. It would help a lot.

Currently, we just use it for sending invoices..”

Karthik Raj S

Consultant at AblyPro

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“We are using Conga Composer in our Salesforce environment to dynamically generate documents. For example, if we have a customer and need to finalize a business deal, we capture deal data.

Suppose you're selling a car; you need to prepare a quote. Conga Composer helps in preparing that quote by mapping fields such as customer information and car details onto a template..”

Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

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“One of our clients is looking to build case summaries or quote summaries where we list all the products they have purchased. They have a complex quote summary requirement. We use Conga Composer to build the entire quote summary, displaying all quote details, products purchased, and related information. The implementation varies according to countries, so we apply many conditions on the same templates. We use Conga Composer for document generation purposes.

We remain consistent with Conga Composer because it satisfies many business use cases. We have used it several times across multiple projects to build similar document solutions. .”

Renu Soni

Senior Salesforce Developer at Minlopro Partners

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“I don't use Conga Composer anymore daily; we have our setup, and it's working fine, so I don't have to touch it. We have something external for contract management. I think we use DiliTrust for the contract management, but mostly our French colleague uses that. In the past, my clients would generate documents using a template through a button or automation, and they could send them afterward using Conga or DocuSign because we can plug them together.

“Today, we're basically doing the same thing. We use a Conga Composer template, and through a button, because some of my colleagues prefer verifying the data and changing a few things before sending the document, while others don't care. We have a button or we have automated the generation and sending of the document using mostly DocuSign. We want our partners to sign the document we are sending them. So we use Conga Composer to generate the document and we use DocuSign combined with Conga Composer to send it and to capture the signature back. That's the use case we have today..”

Verified user

Salesforce Specialist at a financial services firm with 5,001-10,000 employees

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“I primarily use Conga Composer for sales proposals and quotes. Whenever I need to auto-generate proposals using opportunity data and determine whether to include pricing discounts and product details, I use Conga Composer.

The process begins when the opportunity is ready and a sales rep is working on an opportunity in Salesforce that contains the account information, products, total value (ACV), and a stage designation of proposal, price, or quote. All this data is already stored in Salesforce. The sales rep then clicks a custom button labeled generate proposal, which is configured to trigger Conga Composer and passes the opportunity ID and related data.

Conga Composer fetches data automatically, pulling account details, opportunity details, and product line items. The system then performs template merging using a pre-built template in MS Word that includes company branding, dynamic fields, static fields, and tables for product line items. Finally, the document generation process produces a PDF or Word proposal instantly, followed by auto delivery and the e-signature process..”

Verified user

[Read full review](#) 

Product owner at a tech vendor with 51-200 employees

“One of the main use cases for Conga Composer would be to generate quote documents. We had different types of quote documents in our business process, so we used different kinds of Conga Composer templates for those. Basically, there was one template for the initial quote to give them an idea of how the price structure is going to work. Once they finalize, we have a different template, so when the deal is finalized and everything is in place, they would be able to see how much they would be paying, including the tax. That was the main use case around it. But as I mentioned earlier, we also used it for other custom objects that we had, such as POV, and to generate and print basically the invoices as well.

We used Conga Composer mainly for generating the documents, but we did not use Conga Composer Sign functionality. Instead, we opted for the DocuSign functionality. Once the document generation process was completed by Conga Composer, we integrated DocuSign into our system. Once the document is generated, it moves to a DocuSign envelope. We are able to send the document to different contacts mentioned there. DocuSign was mainly for sending the document to get it signed, and once it comes back signed, we also had an automation in DocuSign that updates some fields at the quote level. It lets us know that the document has been signed and things around that..”

Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

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Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

“The initial setup is at an intermediate level of difficulty since understanding Conga Composer for the first time can be confusing. However, once you read all the guidelines and features, it becomes very easy to use..”

Pawan Kumar Patel

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Salesforce QA at .360 Degree Cloud Technologies Pvt. Ltd

“The setup was very easy because Conga Composer is an AppExchange product. We just installed it and got the complete suite we needed. It was not complicated to move it to production..”

Mamathesh MR

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Salesforce Developer at Shrum Tech

“The initial setup involves going to AppExchange, searching for Conga Composer, and installing it in your Salesforce organization. The setup requires assigning permission sets and following several configuration steps..”

Ankit-Verma

Developer at S&P Global

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“Before Conga Composer, the proposal creation time was ten to fifteen minutes per document, with manual steps including copying data from Salesforce, pasting it into Word, then formatting tables and pricing. After Conga Composer, proposal generation takes only about ten to twenty seconds. The overall time saved for a proposal is ten to forty minutes..”

Verified user

Product owner at a tech vendor with 51-200 employees

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“The initial setup for Conga Composer was not very difficult; it was very easy. As for pricing and licensing, back then we had a very good budget. We looked for a good replacement for the CPQ standard functionality we had to generate documents. We found a very good replacement in Conga Composer and were glad to pay the price they showed back then. It was not very much, but now with a lot of new tools and freeware available, the cost factor becomes a reason to consider whether we should renew our subscription..”

Skumar Skumar

[Read full review](#) 

Salesforce Application Support Specialist at Vectra AI

“Regarding my experience with the setup process, initially it was difficult. I had to go through YouTube or documents from Conga and then do it by myself. It is a little difficult. If we had a step-by-step guide on how to use Conga Composer and how to create templates, that would be easier. Whatever videos are available on YouTube for Conga are too old, from five, six, or four years ago. Those should be updated. If they were updated, it would be useful for customers or a Salesforce admin.

My setup was done in-house. I did that by myself.

We just set up Conga Composer. It was already downloaded and installed on our PC. We just had to set it up and assign permissions, then create the solution..”

Karthik Raj S

[Read full review](#) 

Consultant at AblyPro

Customer Service and Support

“The support team for Conga Composer is very responsive and effective. I had only one minor issue, which was resolved quickly due to their prompt assistance..”

Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

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“The support team is responsive and quick compared to other products. They connect with us promptly, go through the issue, and provide solutions effectively..”

Anvesh Kumar Janjarla

Senior consultant at IMB

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“I've reached out to support many times based on the documentation. I'm trying to follow it, and it doesn't match what I'm seeing, so I end up having to contact Conga directly for them to let me know that the issue was that I do not have the license that they need for that..”

Francisco Lozano

Senior Technology Consultant & Developer at Parquet Development

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“We've used them once for an issue, and they were able to help. Then, there was another time when we had a general question, and they couldn't assist us. However, with the help of the community, we got it answered..”

Chris Leszka

Director at Informa

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“We often escalate questions to technical support and we get a solution quickly. There are no issues from there.

I would rate the technical support on a scale of one to ten as eight or nine..”

Karthik Raj S

Consultant at AblyPro

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“We found customer support to be helpful, but there were instances where we faced issues with flags that allow you to hide or show tables. In cases where your contract is complex, using many formulas or spans 30 to 40 pages, those flags do not reliably function. When we consulted support, they advised reducing the complexity of our contracts instead of proposing a fix, leading us to ultimately cut back on the number of contract documents..”

Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

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Other Advice

“I recommend Conga Composer for those whose business needs align with its capabilities. It's a powerful tool within the Salesforce ecosystem.

I'd rate the solution eight out of ten..”

Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies

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“The best advice I could give to those looking to use Conga Composer is that it is effective, saves time, and is efficient. I recommend starting simple and then scaling gradually. It is not required to automate everything at once. You can begin with one use case and one clean template, then gradually expand to contracts and invoices while investing time in template design and understanding the Salesforce data model.

Overall, Conga Composer is a good tool to use and enhances the Salesforce ecosystem. I gave this product a rating of eight out of ten. .”

Verified user

Product owner at a tech vendor with 51-200 employees

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“As I said, I haven't checked lately what is in Conga Composer. I think I haven't checked since last year probably, so maybe there's something that I don't know, and I need to check.

“DiliTrust is spelled D I L I T R U S T.

“It's not that we stopped dealing with Conga Composer extensively; we are still using it. We just don't have a new implementation because we have an implementation that is working fine. The users are using it almost daily. I didn't have a new implementation since the last time I made the review. That's what I meant.

“I would rate my overall experience with Conga Composer as an eight..”

Verified user

Salesforce Specialist at a financial services firm with 5,001-10,000 employees

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“I have Conga Composer experience. Basically, we are a consulting firm, so we work on client's organizations. I have experience with that.

I would rate the technical support on a scale of one to ten as eight or nine.

Given my experience with Conga Composer, I would say go with YouTube first and learn the basics. Then use Conga Composer documentation website to understand more in depth. After that, anyone can set it up. There are no issues.

I purchased Conga Composer directly from Certinia.

I would assess the automation benefits that Conga Composer provides in reducing manual document tasks as good right now. However, it is not user-friendly. The UI is a little confusing. We should have more Conga videos on YouTube or elsewhere that help us to learn and use it on our PC or system and the Salesforce system.

I would rate this review an eight overall..”

Karthik Raj S

Consultant at AblyPro

[Read full review](#) 

“I have experience with Conga Composer and have built document generation solutions for one of my clients using it.

I have not integrated Conga Composer with other Conga products such as Collaborate or Conga Contracts.

I have not utilized the automation aspect of Conga Composer.

I decided to choose Conga Composer because using the standard option, we can only build basic and simple quote templates. Our use case required a complex

business template where sections display based on specific conditions and visibility rules. We needed to show data based on user input and selections, displaying information accordingly by bringing data from different objects under different conditions. Conga Composer allowed us to make queries and display data with the necessary filtration, which is why we selected it.

We have also used OmniStudio for document generation, which is a good option.

I would suggest to other organizations considering Conga Composer that if they are looking for a tool to build complex quote templates, they can definitely go with Conga Composer. It is a good option that is easy to manage and use. My overall rating for this product is 9 out of 10. .”

Renu Soni

Senior Salesforce Developer at Minlopro Partners

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“I don't think we did anything unique with Conga Composer, but we did use a lot of templates on a single object. As I mentioned, on the quote object itself, we had a couple of templates, including an initial contract template and a finalized contract template. We used it for different templates, and we also built different Conga Composer queries to pull in the data for the merge field that actually gets printed in the document.

I don't think the automation part of Conga Composer is really that good, but the template creation part is extremely easy. It allows me flexibility to send the documents. We have that flexibility for DocuSign, so there's Conga Composer Sign that you can utilize, and it very closely integrates with Conga Composer. Once your document is generated, you can send it via Conga Composer Sign to any customer. The integration part is, of course, very easy and native with [Salesforce](#). Within [Salesforce](#) itself, you have the managed package application from where you configure different things about Conga Composer, so it's very easy there as well.

On a scale of one to 10, I would rate Conga Composer a seven. The reason I say seven is that there are a lot of freeware tools right now that offer the same functionality for free. There are many LinkedIn posts talking about people coding their own composers in Salesforce that allow document generation similar to Word templates we have in Conga Composer. That same functionality is being offered for free, although it's not as scalable or foolproof as Conga Composer. There are many new developments in the market, so they should work on the cost aspect.

I have provided enough improvements and given a lot of suggestions, which you can find in my previous answers. There is a lot of scope for improvements there. My overall rating for Conga Composer is seven out of ten..”

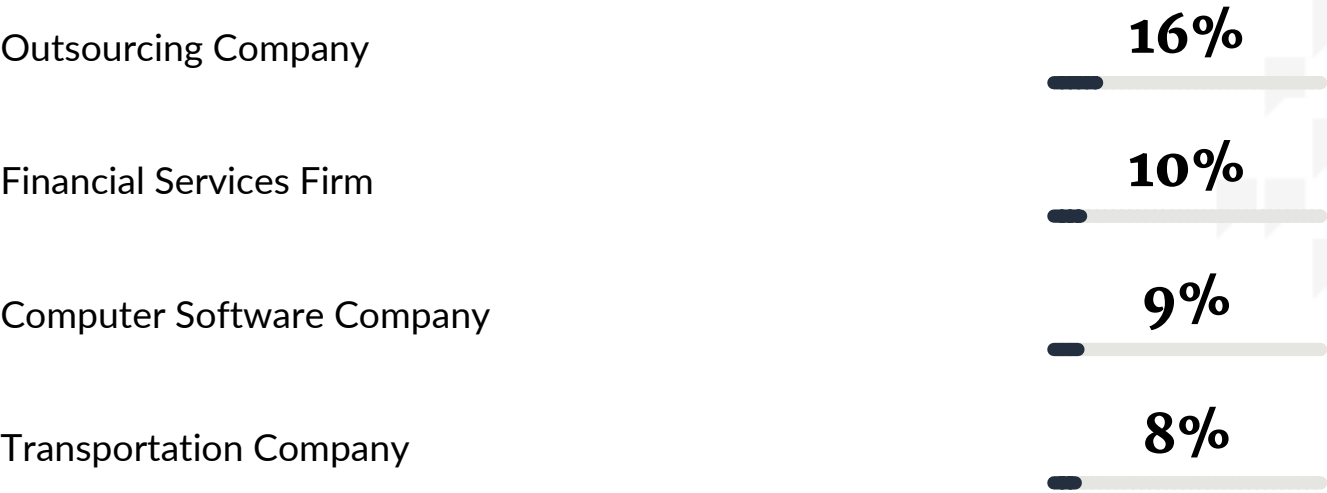
Skumar Skumar

Salesforce Application Support Specialist at Vectra AI

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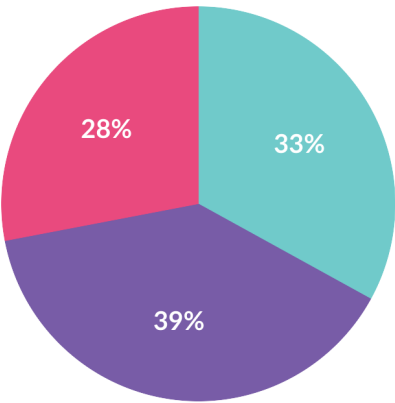
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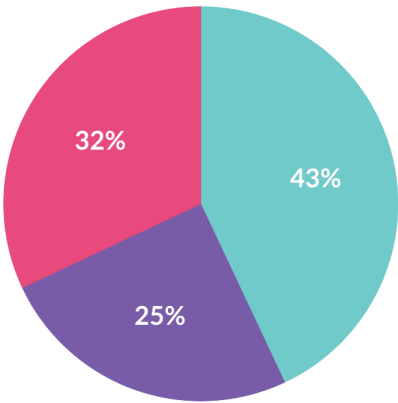


Company Size

by reviewers



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Large Enterprise Midsized Enterprise Small Business

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244 5th Avenue, Suite R-230 • New York, NY 10001

reports@peerspot.com

+1 646.328.1944