



Conga Composer

Reviews, tips, and advice from real users



Powered by  **PeerSpot**

Contents

Product Recap..... 3 - 4

Valuable Features..... 5 - 9

Other Solutions Considered..... 10 - 11

ROI..... 12

Use Case..... 13 - 15

Setup..... 16 - 18

Customer Service and Support..... 19 - 20

Other Advice..... 21 - 23

Trends..... 24 - 25

About PeerSpot..... 26 - 27

Product Recap



Conga Composer

Conga Composer Recap

Conga Composer® optimizes your Salesforce investment by removing the roadblocks associated with document creation. Create and deliver robust, sophisticated documents with ease, including presentations, sales documentation and reports by merging data from any standard or custom object into richly-formatted templates

Conga Workflow® Trigger the execution of individual Composer solutions via Salesforce workflow rules without user interaction.

Conga Mail Merge® Simplify mass mailings by generating hundreds of printable letters, labels and envelopes at once

Enhance your Conga Composer solution with these increased capabilities:

Conga Conductor® Launch on-demand or scheduled Conga Composer solutions in batches, saving time, effort and money when you need to run the same Composer solution for many records at once or on a recurring interval.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“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



“What I like about Conga Composer is that it's much easier than Salesforce's native templating. It's simple to add merge fields, write queries to pull data and access up to four levels of related objects. This makes it very comfortable to get all the needed data into templates.”



Yashashvini YAGATI MATH

Salesforce Consultant at Cognizant



“Once you understand how to build the templates, it's a pretty straightforward process. It allows you to create both Word and Excel documents.”



Chris Leszka

Director at Informa



“The most valuable feature is the automatic generation of invoices and the ability to merge fields from Salesforce into the document, creating a clean and professional invoice.”



Ankit-Verma

Developer at S&P Global



“It's quite simple.”



Francisco Lozano

Senior Technology Consultant & Developer at Parquet Development



“I have never faced any issues with stability.”



Aniket Taliyan

Senior Salesforce Developer at Creatique Technologies



“I find the Conga email template creation and the document template creation features very useful.”



Anvesh Kumar Janjarla

Senior consultant at IMB

What users had to say about valuable features:

“The declarative features and automatic API selections are great as they help with pre-built documentation, query generation, template generation, and articulation. These features make the tool easy to use, even for new developers. It allows for good customization from both the declarative and programmatic perspectives..”

Mamathesh MR

Salesforce Developer at Shrum Tech

[Read full review](#) 

“I like that Conga Composer allows for the generation of PDFs according to specific requirements by creating templates and pulling all the information added into those fields. The guidelines are already defined in Composer, and there are tool tips to help identify templates and strategy implementations..”

Pawan Kumar Patel

Salesforce QA at .360 Degree Cloud Technologies Pvt. Ltd

[Read full review](#) 

“Conga Composer is very user-friendly for composing new templates and integrating data from Salesforce. Its integration and user interface are very friendly, and the product supports multilingual and e-signature features..”

Verified user

[Read full review](#) 

Salesforce Lead Consultant at a insurance company with 51-200 employees

“The most valuable feature is the automatic generation of invoices and the ability to merge fields from Salesforce into the document, creating a clean and professional invoice. After generating the document, it can be sent for a signature using Conga eSign, and the signed document is then updated in Salesforce with a completed status..”

Ankit-Verma

[Read full review](#) 

Developer at S&P Global

“There's nothing in particular. It's just what the client decides to use. I just use it. It's quite simple. Most of the clients do have it. It's better than having to go in and do it manually, creating a Visualforce page to use as a template, which is another thing that we do here. If the client only has one template to use, then we recommend that they go that route. However, if they do have many templates or they need to be changing them constantly, and it's more expensive for them to hire us to change them every time, then we usually recommend that they use something like Conga..”

Francisco Lozano

Senior Technology Consultant & Developer at Parquet Development

[Read full review](#) 


“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

[Read full review](#) 

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

[Read full review](#) 

“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

[Read full review](#) 

“Conga Composer offers extensive customization and flexibility, that allows us to create documents that perfectly align with our branding and specific business requirements.

We have successfully used Conga to generate complex reports, dynamic data, and visually appealing invoices. The level of customization available is very impressive, which is why we prefer Conga over other document-generation tools..”

Pathan Imroz

Consultant at a tech services company with 51-200 employees

[Read full review](#) 

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..”

Rokaya Amoussa

Salesforce Specialist at Fitness Company

[Read full review](#) 

Use Case

“We use Conga Composer primarily for document generation purposes and for an approval process. We have used it in various projects for generating Composer documents..”

Verified user

Salesforce Lead Consultant at a insurance company with 51-200 employees

[Read full review](#) 

“We used Conga Composer for bill generating. They were having transactions on a click of a button, and we had to collect those fields automatically based on the criteria, and we had to map them dynamically..”

Mamathesh MR

Salesforce Developer at Shrum Tech

[Read full review](#) 

“I have a project where I generate a document and send it via client email when an opportunity arises in Salesforce. When the opportunity is won, an invoice is automatically sent to the recipient. I also use it to generate documents and send them for signatures using Conga eSign..”

Ankit-Verma

Developer at S&P Global

[Read full review](#) 

“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

[Read full review](#) 

“In the project, we were generating a PDF based on the insurance, creating the contract form and agreements, and sending that PDF to the customer by merging all the information from Salesforce.

We installed all the packages of Conga Composer into Salesforce and integrated them to pull all the information from Salesforce to the PDF and then sent those PDFs to the customers..”

Pawan Kumar Patel

Salesforce QA at .360 Degree Cloud Technologies Pvt. Ltd

[Read full review](#) 

“We use Conga Contracts, Conga Composer, Conga Grid, and Conga Orchestrate. We have a business all over the world, and due to currency symbols, alphabetical changes, logos, and entity names, we need to build a formula where the template remains the same but the contract terms are different for various countries.

Another use case is loss tracking, where we track transactions and collections through Salesforce with Conga Composer and Conga Contracts. We also handle the contract signing in Adobe, which integrates with Conga, storing signed contracts in Salesforce, Check Point, and Amazon S3..”

Praveen Umapathy

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

[Read full review](#) 

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

[Read full review](#) 

Salesforce QA at .360 Degree Cloud Technologies Pvt. Ltd

“The setup process involved reproducing the same configurations in different environments like development, QA, UAT, and production manually. We manually copied and pasted components without going through any deployment process..”

Anvesh Kumar Janjarla

[Read full review](#) 

Senior consultant at IMB

“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

Salesforce Developer at Shrum Tech

[Read full review](#) 

“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

[Read full review](#) 

“The initial setup is manual and takes about two to three hours. For my current project, I have Conga Composer installed in developer and QA orgs. In previous projects, we deployed it from dev to QA to UAT and then to production, which required manual steps. It's a cloud-based solution that works with Salesforce..”

Yashashvini YAGATI MATH

Salesforce Consultant at Cognizant

[Read full review](#) 

“You need to determine your requirements before deployment in Salesforce. Conga Composer is not easy to deploy because of the records (queries records) you need.

When you create queries, or basically some records, and have to call those IDs in the buttons, you have to go in and change them one by one, which is a bit annoying.

To set up and use Conga Composer effectively, you need to have some technical knowledge, particularly from Salesforce. You should be comfortable with technical concepts. This is because you may need to create queries and understand technical aspects at times. While customers could potentially use it, technical sensitivity is recommended for ease of implementation.

Integration with CRM System:

We use Salesforce, and the integration with Conga Composer is seamless. Upgrades are easy, and we can easily capture information from different objects to use in document generation..”

Rokaya Amoussa

Salesforce Specialist at Fitness Company

[Read full review](#) 

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

[Read full review](#) 

“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

[Read full review](#) 

“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

[Read full review](#) 

“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

[Read full review](#) 

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

[Read full review](#) 

“It's crucial to learn the tool and understand the contract process. If you are familiar with the contract process, using Conga Composer becomes easier.

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

Praveen Umapathy

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

[Read full review](#) 

“We have recommended Conga Composer to more than five to ten clients, and they are still using it. I would also recommend it to others for generating policy information, vehicle information, or loan agreements and banking documents.

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

Pawan Kumar Patel

Salesforce QA at .360 Degree Cloud Technologies Pvt. Ltd

[Read full review](#) 

“I would recommend this product to other people. If they need to have a lot of templates and need to make changes often, like every three months or less, then I would say they should go the route of using either Conga Composer or any other similar application.

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

Francisco Lozano

Senior Technology Consultant & Developer at Parquet Development

[Read full review](#) 

“Conga Composer is easy to maintain and configure. It is a highly recommended product as it does a lot of work efficiently. It allows for good customization from both the declarative and programmatic perspectives. However, it would be beneficial to have a preview option for templates to make testing faster.

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

Mamathesh MR

Salesforce Developer at Shrum Tech

[Read full review](#) 

“I would recommend Conga Composer to others, especially those using [Salesforce](#), as it integrates well with Salesforce for document and e-sign features. The decision between [DocuSign](#) and [Conga Sign](#) ultimately lies with management.

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

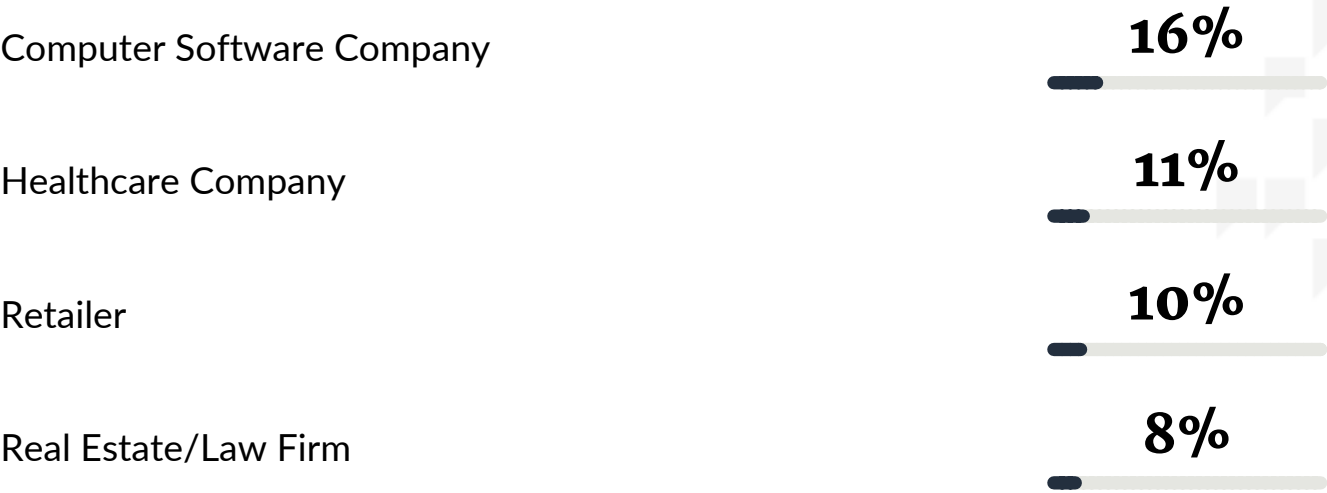
Verified user

Salesforce Lead Consultant at a insurance company with 51-200 employees

[Read full review](#) 

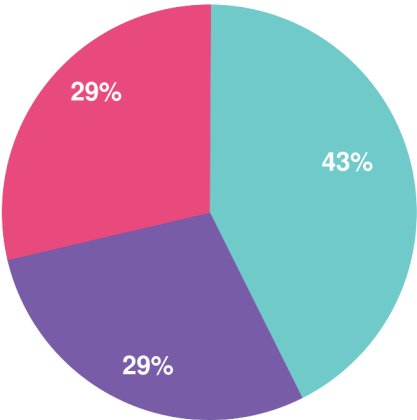
Top Industries

by visitors reading reviews

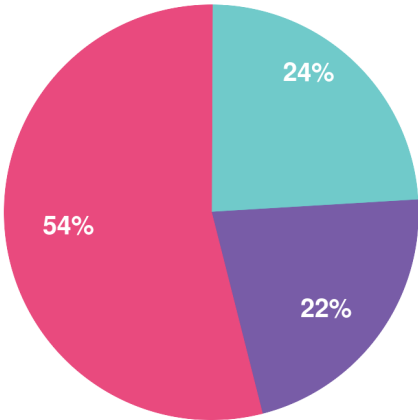



Company Size

by reviewers



by visitors reading reviews



 Large Enterprise  Midsize Enterprise  Small Business

About this buyer's guide

Thanks for downloading this PeerSpot report.

The summaries, overviews and recaps in this report are all based on real user feedback and reviews collected by PeerSpot's team. Every reviewer on PeerSpot has been authenticated with our triple authentication process. This is done to ensure that every review provided is an unbiased review from a real user.

Get a custom version of this report... Personalized for you!

Please note that this is a generic report based on reviews and opinions from the collective PeerSpot community. We offer a [customized report](#) of solutions recommended for you based on:

- Your industry
- Company size
- Which solutions you're already considering

The customized report will include recommendations for you based on what other people like you are using and researching.

Answer a few questions in our short wizard to get your customized report.

[Get your personalized report here](#)

About PeerSpot

PeerSpot is the leading review site for software running on AWS and other platforms. We created PeerSpot to provide a trusted platform to share information about software, applications, and services. Since 2012, over 22 million people have used PeerSpot to choose the right software for their business.

PeerSpot helps tech professionals by providing:

- A list of products recommended by real users
- In-depth reviews, including pros and cons
- Specific information to help you choose the best vendor for your needs

Use PeerSpot to:

- Read and post reviews of products
- Access over 30,000 buyer's guides and comparison reports
- Request or share information about functionality, quality, and pricing

Join PeerSpot to connect with peers to help you:

- Get immediate answers to questions
- Validate vendor claims
- Exchange tips for getting the best deals with vendor

Visit PeerSpot: www.peerspot.com

PeerSpot

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

reports@peerspot.com

+1 646.328.1944