



## Conga Service Description

### CLM (Spring 2024) – Generator, Initiator, Business, and Enterprise Editions

Contract Lifecycle Management (CLM) is the process of managing contract creation, negotiation, execution, and maintenance. Conga CLM is a cloud-based solution that standardizes, streamlines, and automates the contract lifecycle management process—from the initial request through drafting, redlining, signing, storing, managing and reporting obligations, and renewing contracts.

Standard features across all CLM Editions\* (subject to individual configuration):

- Manage agreement templates
  - Create templates
  - Manage template versions
  - Set up template filtering rules
  - Configure query templates
- Work with offline agreements
  - Create or import offline agreements
  - Perform a standard text search
  - Store agreements in a central repository
- Manage agreements
  - Create, generate, send for review, negotiate, finalize, sign/execute, and activate agreements
  - Manage standard CRM approvals
  - Manage document versioning
  - Manage agreement hierarchy
  - Create and execute standard reports and charts
  - Create agreements through wizard

| CLM Generator Edition  | CLM Initiator Edition  | CLM Business Edition  | CLM Enterprise Edition   |
|--|--|---|--|
| All standard features, plus: <ul style="list-style-type: none"> <li>• Composer Business Edition</li> <li>• Conga Sign for CLM</li> </ul> | All standard features, plus: <ul style="list-style-type: none"> <li>• Conga Sign for CLM</li> <li>• Full-text search including terms and clauses</li> <li>• Multi-language templates</li> <li>• Online Contract Collaboration</li> <li>• X-Author for Contracts for templating</li> <li>• Conga Grid (for CLM use)</li> <li>• Integration to eSignature</li> </ul> | All features in Initiator, plus: <ul style="list-style-type: none"> <li>• Lifecycle actions (activate, terminate, renew, and amend)</li> <li>• Smart documents</li> <li>• Check-in, check-out, versioning, redlining, comparison, and reconciliation</li> <li>• X-Author for Contracts for redlining</li> <li>• Self-service contract request wizard</li> <li>• In-effect view</li> <li>• Advanced search (text and metadata)</li> <li>• Send for internal or external review</li> <li>• Conga Approvals</li> </ul> | All features in Business, plus: <ul style="list-style-type: none"> <li>• Kira Intelligent Discovery adapter</li> <li>• Conga Max (Slack and Microsoft Teams integration)</li> <li>• Conga Grid (full license)</li> </ul> |



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\*The following variations of the CLM Editions have different features than those listed above:

**Admin:** Bundles all Subscription Services required to create, manage, and configure applicable CLM processes via CLM Admin or X-Author for Contracts. An Admin user who is also an end-user does not need an additional end-user subscription because admin functionality includes end-user functionality. For CLM Business Edition and Enterprise Edition, Admin user functionality includes Conga Approvals, which enables Admin users to configure and manage advanced workflow processes associated with Conga objects, including quotes, contracts and deals, as well as non-Conga objects. Conga Sign Admin and Conga Grid Admin are also included.

**Collaborator:** Collaborator users may request and generate agreements from pre-approved templates. Collaborator users: (a) may access Online Contract Collaboration for online redlining and commenting capabilities; (b) may access the contract repository, individual contracts, and related contract information; perform searches, participate in approvals, receive notifications, and view reports; and (d) have access to enhanced mobile capabilities via Max, the intelligent mobile assistant. Collaborator users do not have access to X-Author for Contracts functionality.

**Collaborator Lite:** For infrequent users of the Subscription Services and are limited to thirty (30) logins per year. Collaborator Lite users: (a) may access Online Contract Collaboration for online redlining and commenting capabilities; (b) may access the contract repository, individual contracts, and related contract information; (c) perform searches, participate in approvals, receive notifications, and view reports may request or generate agreements from pre-approved templates. Collaborator Lite users do not have access to X-Author for Contracts functionality.

**Read-Only:** Read-Only users may view objects, dashboards and reports (subject to the security configuration) and search for records, with the following restrictions: cannot edit a record, cannot receive alerts and notifications, cannot create new dashboards, and cannot approve.



**CPQ (Spring 2024) – Quick Start, Essentials, and Enterprise Editions**

Configure Price Quote (CPQ) is the process of configuring products and services, applying pricing to them, and generating quotes based on predefined rules. Conga CPQ is a cloud-based sales tool for companies to manage this process, enabling them to centralize, standardize, and automate the creation of products, pricing, and business rules to produce complex quotes.

Standard features across all CPQ Editions\* (subject to individual configuration):

- Products and configuration
  - Product catalog
  - Standalone products
  - Single-level product bundles
  - Configuration rules (inclusion, exclusion, quantity, and duration)
  - Catalog search with filters
- Pricing management
  - Multiple price lists
  - Multiple charges
  - Related pricing
- Pricing discounts by percentage, amount, and volume
- Quote and order
  - Quote template designer
  - Quote in Microsoft Word, PDF, or RTF
- Reporting and analytics
  - Standard reports and charts
  - Alerts and notifications
  - Share and schedule reports
- Standard CRM approvals

| CPQ Quick Start Edition | CPQ Essentials Edition   |  | CPQ Enterprise Edition  |
|-------------------------|--|--|---|
| All standard features.  | All features in Quick Start, plus: <ul style="list-style-type: none"> <li>• Multiple product catalogs</li> <li>• Product images and collateral</li> <li>• Asset and attribute-based rules</li> <li>• Product visibility and availability rules</li> <li>• Product comparison</li> <li>• Pricing tiers and ramps</li> </ul> | <ul style="list-style-type: none"> <li>• Attribute, usage, and formula-based pricing</li> <li>• Dynamic document generation</li> <li>• Multi-site quoting</li> <li>• Automated renewals</li> <li>• Favorite configurations</li> <li>• Deal Manager Plus</li> <li>• Adobe Sign and DocuSign adapters</li> </ul> | All features in Essentials, plus: <ul style="list-style-type: none"> <li>• Multi-level, configuration bundles</li> <li>• Price waterfalls</li> <li>• Split/merge subscriptions</li> <li>• Eligibility framework for services</li> <li>• Service as a percentage of equipment</li> <li>• Service agreements</li> <li>• X-Author Enterprise</li> <li>• Max Intelligent Assistant</li> </ul> |

\*The following variations of the CPQ Editions have different features than those listed above:

Admin: Bundles all Subscription Services needed to create and manage applicable CPQ processes. An Admin user who is also an end-user does not need an additional end-user subscription because admin functionality includes end-user functionality.

Read-Only: Read-Only users may view objects, dashboards and reports (subject to the security configuration) and search for records, with the following restrictions: cannot edit a record, cannot receive alerts and notifications, cannot create new dashboards, and cannot approve quotes.



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### Revenue Lifecycle Cloud CPQ (Spring 2024)

Configure Price Quote (CPQ) is the process of configuring products and services, applying pricing to them, and generating quotes based on predefined rules. Revenue Lifecycle Cloud CPQ (RLC CPQ) is a cloud-based sales tool for companies to manage this process, enabling them to centralize, standardize, and automate the creation of products, pricing, and business rules to produce complex quotes.

| Standard CPQ Features<br>(subject to individual configuration)                                     | Admin                       | User                        | Approver   | Read Only |
|--|-----------------------------|-----------------------------|------------|-----------|
| Product Catalog  | Create/Delete<br>Read/Write | Read                        | Read       | Read      |
| Product Configuration Rules  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Price Book and Pricing Rules   | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Create, Manage, and Finalize Cart  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read/Write | Read      |
| Configure and Apply Promotions   | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Generate Proposal and Quote Documents via Conga Composer, X-Author for Word, or X-Author for Excel | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| eSignature via Conga Sign  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Configure and Manage Approvals   | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read/Write | Read      |
| Configure and Manage Assets  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Manage Renewals  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Order Management of Add-Ons, Changes, and Cancellations  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |
| Set Up & Administration  | Create/Delete<br>Read/Write | Read                        | Read       | Read      |
| Reporting and Analytics  | Create/Delete<br>Read/Write | Create/Delete<br>Read/Write | Read       | Read      |

#### User/Transaction Type Definitions:

- Admin:** May create and manage applicable RLC CPQ processes. An Admin user who is also an end-user does not need an additional end-user subscription because admin functionality includes access to all the functional capabilities of RLC CPQ. Conga Sign Admin and Conga Composer Admin are also included (see



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“Additional, Included Products” below).

- **User:** May select a product or service from the product catalog, and then configure, price and generate a quote. Users can configure any type of product or service offering with unlimited features, options, bundles and constraint rules. Supports multiple pricing and adjustment options, including subscription pricing, pricing ramps, markups and overrides.
- **Approver:** May view objects, dashboards and reports (subject to the security configuration) and search for records, with the following restrictions: cannot edit a record, cannot receive alerts and notifications, and cannot create new dashboards.
- **Read Only:** May view objects, dashboards and reports (subject to the security configuration) and search for records, with the following restrictions: cannot edit a record, cannot receive alerts and notifications, cannot create new dashboards, and cannot approve quotes.
- **API Digital Commerce Transaction:** Each transaction represents a full quote lifecycle including creation, cart revisions, cart finalization, order approval, quote document generation and eSignature, with the core transaction measure being the creation of a quote regardless of whether all, part, or none of the quote results in a final/approved quote. API Digital Commerce Transactions are only applicable if purchased in addition to RLC CPQ.

### **Storage:**

RLC CPQ includes the following storage entitlements:

- Per user:
  - Data Storage: 40MB per User, aggregated and pooled across the existing org
  - File Storage: 4GB per User, aggregated and pooled across the existing org
- Per org:
  - Sandbox environments:
    - 2 Partial Sandboxes with 5 GB file storage & 5 GB data storage each. A “Partial Sandbox” is a developer sandbox, including metadata, plus the sample data defined during sandbox setup.

### **Additional, Included Products:**

Subscription to RLC CPQ includes access to Conga Composer and Conga Sign to support and enhance the RLC CPQ experience, subject to the permissions indicated in the above table and the following restrictions:

- Conga Composer:
  - Users may only utilize Conga Composer for quoting purposes. If a user requires document generation outside their quoting/RLC CPQ use case, purchase of a standalone Conga Composer subscription is required.
  - Users may execute a maximum of three (3) Conga Composer Transactions for per each quote generated in RLC CPQ. Additional usage requires the purchase of Revenue Lifecycle Cloud Composer Advanced Usage. “Conga Composer Transaction” means the population of a single quote template through Conga Composer by retrieving from a third-party service, regardless of whether all, part, or none of the document represents a final/approved quote.
- Conga Sign:
  - Users may only utilize Conga Sign for quoting purposes. If a user requires eSignature outside their quoting/RLC CPQ use case, purchase of a standalone Conga Sign subscription is required.
  - Users may execute a maximum of three (3) Conga Sign Transactions per each quote generated in RLC



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CPQ. Additional usage requires the purchase of Revenue Lifecycle Cloud Sign Advanced Usage. "Conga Sign Transaction" means the sending of a single quote through Conga Sign to one or multiple parties in a single action, regardless of whether all, part, or none of the parties sign the document.



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### **Conga Collaborate (Spring 2024)**

Conga Collaborate allows users to generate documents by utilizing pre-built templates to create proposals, quotes, invoices, and more from a variety of CRM systems in an online format. Users can share digital documents and collaborate online in real-time with people throughout their organization.

Conga Collaborate includes the features listed below (subject to individual configuration):

#### **Conga Collaborate Features**

- Creating, editing and receiving documents from the Conga Collaborate web application or from the API
- Launching documents from within supported third-party systems
- Retrieving data from supported third-party systems
- Creating and editing document templates from the Conga Collaborate web application or from the API
- Integrating with supported third-party e-signature and form providers
- Retrieving stored documents from the Conga Collaborate repository



**Conga Composer (Spring 2024)**

Conga Composer enables customers to perform document generation and reporting within a variety of CRM systems or in the independent web-based version of the application. Conga Composer allows users to populate formatted templates with data from any standard or custom object in Salesforce or the Conga Composer Web Application and then send the generated document via one of a variety of delivery options.

Conga Composer includes the features listed below (subject to individual configuration):

**Conga Composer Features**

- Merging data into templates
- Launching a Conga Composer solution
- Run-time user interface is available (available only with the Salesforce version of the application)
- Retrieving Salesforce data
- Accessing Template Builder or View Data Workbook to create merge fields (available only with the Salesforce version of the application)
- Accessing Solution Manager and Document Automation Wizard (available only with the Salesforce version of the application)
- Composer merge via API





## Conga Service Description

### **Conga Contracts for Salesforce (Spring 2024)**

Conga Contracts for Salesforce allows users to send contracts directly from Salesforce, compare versions, sync data back to Salesforce, and maintain an audit trail.

Conga Contracts for Salesforce includes the features listed below (subject to individual configuration):

#### **Conga Contracts for Salesforce Features**

- Sending for negotiation
- Accessing the run-time user interface via the View Redlines button
- Saving data using True-Up
- Compare document revisions
- Open in Word
- Negotiate with Conga Composer-generated documents, if applicable
- Selecting and managing Clause Bundles through the standard interface



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### **Conga Contracts (Spring 2024)**

Conga Contracts is a solution that streamlines and automates the contract lifecycle management throughout the entire process — creating contracts, sending and receiving approvals, making and tracking changes, and reporting.

Conga Contracts includes the features listed below (subject to individual configuration):

#### **Conga Contracts Features**

- Creating, editing, viewing and searching standard field information in the repository
- Uploading files
- Contract creation
- Requesting a contract in the Conga Contracts application
- Contract request approvals in the Conga Contracts application
- Taking action on flows within the Conga Contracts application
- Display contract status
- Sending contracts for negotiation
- Sending and receiving messages from Company and Contracts profiles
- Running reports
- Using document compare on native files
- Administrator access to lists, additional forms, users and roles, Contract types, Contract flows, system settings, and global messaging



**Conga Grid (Spring 2024)**

Conga Grid allows users to analyze data in Salesforce with dynamic view and action options, such as conditional formatting, sorting, and mass updates.

Conga Grid includes the features listed below (subject to individual configuration):

**Conga Grid Tier Features**

- Creating, changing and saving a grid view
- Editing and saving data in a grid
- Adding or removing a related field to a grid
- Adding a record in-line from a grid



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### **Conga Orchestrate (Spring 2024)**

Conga Orchestrate allows users to define processes on a Campaign, Case, Contract, Lead, Opportunity, and/or Business Process object (a custom object added by Conga Orchestrate), as well as any custom object in Salesforce. When a user creates or edits records in Salesforce, Conga Orchestrate monitors these actions and executes processes when that user's Definitions match the record.

Conga Orchestrate includes the features listed below (subject to individual contribution):

#### **Conga Orchestrate Features**

- Running a process or generating a step based on a matching definition
- Making changes to an active definition
- Ability of the process engine to execute valid process definitions
- Ability to visualize processes on the process visual screen



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### **Conga Sign (Spring 2024)**

Conga Sign is an e-signature application that can operate withing a CRM system like for Salesforce or independently as a web-based application. Users can initiate a Conga Sign process from any object in the applicable CRM system or in the web-based version of the application through APIs using pre-defined templates or by adding signature tags in real-time. Users may select recipients, set the signing order, and send the document to be signed.

Conga Sign includes the features listed below (subject to individual configuration):

#### **Conga Sign Features**

- User can initiate and complete a signing session
- Creating and sending a Conga Sign transaction for signature
- Updating Conga Sign Audit Trail with creating, viewing, signing, and completing activities
- Delivery of a completed Conga Sign document