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: • Composer Business Edition • Conga Sign for CLM	All standard features, plus: • Conga Sign for CLM • Full-text search including terms and clauses • Multi-language templates • Online Contract Collaboration • X-Author for Contracts for templating • Conga Grid (for CLM use) • Integration to eSignature	All features in Initiator, plus: • Lifecycle actions (activate, terminate, renew, and amend) • Smart documents • Check-in, check-out, versioning, redlining, comparison, and reconciliation • X-Author for Contracts for redlining • Self-service contract request wizard • In-effect view • Advanced search (text and metadata) • Send for internal or external review • Conga Approvals	All features in Business, plus: • Kira Intelligent Discovery adapter • Conga Max (Slack and Microsoft Teams integration) • Conga Grid (full license)

*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.

Revenue Lifecycle Cloud CLM (Fall 2024) – Business & 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.

Feature Comparison of CLM Editions:

	Revenue Lifecycle Cloud CLM for Web		Revenue Lifecycle Cloud CLM for Salesforce	
	Business Edition	Enterprise Edition	Business Edition	Enterprise Edition
Contract request				
Manage clause library	☑	☑	☑	☑
Out-of-the-box template frameworks	☑	☑	☑	☑
Create templates	10	Unlimited	10	Unlimited
Manage templates	☑	☑	☑	☑
Manage agreements				
X-Author for Contracts: add-on lets you work on contracts in Microsoft Word	☑	☑	☑	☑
Check-in, check-out, versioning, redlining, comparison, and reconciliation	☑	☑	☑	☑
(X-Author for redlining)	☑	☑	☑	☑
Real-time collaboration with Microsoft Office 365	☑	☑	☑	☑
Create, generate, send for review, negotiate, finalize, approve, and activate agreements	☑	☑	☑	☑
Custom workflows	☑	☑	☑	☑
Manage approvals and approval groups	☑	☑	☑	☑
Clause-specific approvals	☑	☑	☑	☑
Create agreements through wizards	☑	☑	☑	☑
Sign				
Out-of-the-box signature workflow and e-signature integration	☑	☑	☑	☑
Conga Sign APIs	☑	☑	☑	☑
Store and amend				
Customizable UI	☑	☑	☑	☑
Repository for all contract types	☑	☑	☑	☑
Contract upload with OCR (subject to configuration)	10,000 contracts/yr	50,000 contracts/yr	10,000 contracts/yr	50,000 contracts/yr
Manage document versioning and agreement hierarchy	☑	☑	☑	☑
3rd party paper contract ingestion/extraction (20 provisions/contract, subject to configuration)	20 contracts/yr	100 contracts/yr	20 contracts/yr	100 contracts/yr
Audit trail	☑	☑	☑	☑
Basic and advanced search (multi-object, text, and data)	☑	☑	☑	☑
Standard reports and dashboards	☑	☑	☑	☑
Milestone alerts	☑	☑	☑	☑
CLM AI				
Discovery AI (Contracts Intelligence): admin and user add-on $	$	$	$	$
Contract AI and Contract Copilot: admin and user add-on $	$	$	$	$
Conga Advantage Platform User Storage Allotments				
Data storage (pooled per organization)	50 MB/User	50 MB/User	50 MB/User	50 MB/User
File storage (pooled per organization	10 GB/User	10 GB/User	10 GB/User	10 GB/User
Conga Advantage Platform Environments/Sandboxes				
(1) Production environment	☑	☑	☑	☑
(1) Full sandbox environment	$	☑	$	☑
(1) Partial sandbox (5 GB data, 5 GB file)	☑	☑	☑	☑
Integrations				
Data sync to and from Salesforce	☑	☑	☑	☑
CLM automation and triggers	☑	☑	☑	☑
Webhooks: integrate, export/import data and automate next steps	☑	☑	☑	☑
Revenue Lifecycle custom code support	☑	☑	☑	☑
Supporting products/services				
X-Author for Contracts (MS Word plugin) and for contract documents generation	☑	☑	☑	☑
Conga Sign	☑	☑	☑	☑
Adobe Sign connector	☑	☑	☑	☑
DocuSign connector	☑	☑	☑	☑
X-Author for Excel	☐	☐	☑	☑
Grid	☐	☐	☑	☑

User-Type Permissions:

	Admin	Full-User	Collaborator	Read-Only
Contract request				
Contract wizard	☑	☑	☑	☐
Advanced contract wizard	☑	☑	☐	☐
Contract generation				
Generate contracts from templates	☑	☑	☑	☐
Author contracts in MS Word with legal playbook	☑	☑	☐	☐
Conditional document assembly	☑	☑	☐	☐
Contract lifecycle				
Contracting objects (data-model)	☑	☑	☑	Read-Only
Lifecycle actions (negotiate, activate, terminate, renew, amend)	☑	☑	☐	☐
Agreement hierarchy	☑	☑	☑	Read-Only
In-effect view	☑	☑	☑	Read-Only
Contract execution				
Conga Sign	☑	☑	☑	☐
Integration to e-Signature (DocuSign/Adobe)	☑	☑	☑	☐
Approvals and workflows				
Contract-level approvals	☑	Permission-based	Permission-based	☐
Clause-level approvals	☑	Permission-based	Permission-based	☐
Workflow designer	☑	☐	☐	☐
Contract playbook and negotiation				
Clause library	☑	☑	☐	☐
Contract templates via MS Word plug-in	☑	☑	☐	☐
Conditional templates	Configure	Generate-Only	Generate-Only	☐
Contract true-up (data reconciliation)	☑	☑	☐	☐
Redlining via MS Word plug-in	☑	☑	☑	☐
Check-in, check-out, and versioning	☑	☑	☐	☐
Send for review	Online or via MS Word	Online Only	☐	☐

Additional User Type Definitions:

- **Contract AI User Add-On:**
  - Contract AI is designed to assist CLM users in generating and interpreting text-based content, providing recommendations, and enhancing productivity across various contract lifecycle management processes. Contract AI is also designed to leverage advanced natural language processing technology to interpret user inputs and deliver contextually relevant outputs via the Contract Copilot, generate insights, compare risk and clause language, and recommend redlining to reduce risk. The following terms apply to Customer's use of Contract AI:
  - Customer may use a maximum of 200 Contract Copilot Prompts per Contract AI user per month. A "Prompt" is defined as any user input or request (regardless of length or complexity) submitted to Contract Copilot that triggers a response from Contract Copilot. Examples of Prompts include, but are not limited to, questions, instructions, and statements.
  - Total Contract Copilot Prompts may be pooled across Customer's Contract AI users each month, but unused Prompts do not rollover to subsequence months during the Subscription Term.
  - Customer acknowledges and agrees that: **(i)** Contract AI is an automated tool and may produce outputs that are inaccurate, misleading, or inappropriate, **(ii)** Customer agrees to exercise discretion in evaluating and using any content generated by the Service and to verify the accuracy of such content before use, **(iii)** Customer agrees to use the Contract Copilot ethically, responsibly, and in compliance with all applicable laws and regulations, **(iv)** Conga may use the data submitted by Customer in using Contract AI to train and improve its machine learning models to continuously learn and refine results for Customer in their instance only, and **(v)** Conga may use aggregated and/or anonymized data for purposes like benchmarking, feature prioritization, error pattern recognition, and/or new product development.

Additional, Included Products:

- Subscription to RLC CLM includes access to Conga X-Author and Conga Sign to support and enhance the contracting/CLM experience, subject to the permissions indicated in the above table and the following restrictions:

  - **X-Author for Contracts:** Customers are entitled to generate documents using X-Author for Contracts specifically for contracting purposes. If a customer requires document generation beyond their contracting/CLM use case, they must purchase additional X-Author for Contracts licenses a la carte.

  - **Conga Sign:** Customers are entitled to send documents for eSignature using Conga Sign specifically for contracting purposes. If a customer requires eSignature outside their contracting/CLM use case, they must purchase standalone Conga Sign Usage.

Configure Price Quote

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: • Multiple product catalogs • Product images and collateral • Asset and attribute-based rules • Product visibility and availability rules • Product comparison • Pricing tiers and ramps	• Attribute, usage, and formula-based pricing • Dynamic document generation • Multi-site quoting • Automated renewals • Favorite configurations • Deal Manager Plus • Adobe Sign and DocuSign adapters	All features in Essentials, plus: • Multi-level, configuration bundles • Price waterfalls • Split/merge subscriptions • Eligibility framework for services • Service as a percentage of equipment • Service agreements • X-Author Enterprise • Max Intelligent Assistant

*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.

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

"Additional, Included Products" below).

- **User:** May select a product or service from the product catalog, and then configure, price, revise, approve, 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. Also includes capabilities like the guided selling engine with recommendation and replacement rules, product visibility rules, numeric expressions and asset-based ordering. Users have access to all of the capabilities of Conga Revenue Lifecycle Cloud CPQ.

- **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:

  o Data Storage: 40MB per User, aggregated and pooled across the existing org

  o File Storage: 4GB per User, aggregated and pooled across the existing org

- Per org:

  o 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:

  o 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.

- Conga Sign:

  o 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.

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

Definitions

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service.

Product Specific Terms

1. All access and interactions between the Subscription Service and Customer's Salesforce.com Service account, other customer relationship management third-party software, and Customer's Subscription Service account are managed exclusively by Customer through Customer's administration and security settings.
2. Customer may retrieve Customer's documents stored within the Subscription Service within 30 days after termination of the Subscription Service. Any documents or Customer Data not retrieved by Customer will be deleted after 90 days.

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

Definitions

"Conga Composer Advanced Features" may include, but are not limited to, URL access to Conga Composer Subscription Service generated documents, SMS features, analytics for Conga Composer Subscription Service generated documents, and advanced customer templates used with the Conga Composer Subscription Service.

"Service Event" means (i) the execution of a single Conga Composer Subscription Service URL triggered via link or button, Conga Trigger Subscription Service, Conga Batch Subscription Service, or by any programmatic means, (ii) the generation of any letter, label, or envelope output file from Conga Mail Merge Subscription Service containing one or more letters, labels, or envelopes, or (iii) the scheduled execution of an individual Conga Batch, regardless of whether any output file is distributed.

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service.

"Salesforce.com Service" means the service provided by salesforce.com, inc. to which Customer must have a separate license in order to obtain or use the Subscription Service.

Product Specific Terms

1. Customer acknowledges and agrees that with each use of the Subscription Service initiated by Customer's Salesforce.com Service authenticated users, the Subscription Service will access Customer's Salesforce.com Service account to retrieve, manipulate, process, and modify Customer Data based on Customer's configuration of the Subscription Service and Customer expressly consents to such access. If the Subscription Service cannot, for any reason outside of Conga's control, access Customer's Salesforce.com Service, Conga will be excused from any nonperformance of the Subscription Service. Customer acknowledges that to provide the Subscription Service, Customer Data leaves the salesforce.com system.

2. Customer's license to Conga Batch and Conga Trigger are subject to the number of Service Events purchased in an Order.

3. Conga may remotely audit Customer's use of the Subscription Service to ensure such use is in accordance with the number of Users, Services Events, and SMS Events in the applicable Order(s). If Customer exceeds the authorized number of Users, SMS Events, or Service Events licensed, Conga may invoice Customer for excess use.

4. The Order for the Subscription Service will identify the User types and/or edition of the Subscription Service applicable to Customer's subscriptions.

5. Customer Data is not backed up with the Subscription Service.

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

Definitions

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service.

Product Specific Terms

1. Customer Data stored by Conga in providing the Subscription Service shall be deleted by Conga within 90 days of termination or expiration of the Agreement. Conga does not have any obligation to return Customer Data stored by Conga.

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

Definitions

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service

Product Specific Terms

1. Upon termination of the Subscription Service, Conga shall return Customer Data maintained in the Subscription Service in a PostGreSQL format at no fee, within 15 business days from the date of termination. If Customer requests Customer Data in a custom format Customer shall pay time and materials for such custom format (as agreed upon by Conga and Customer). Conga shall delete all Customer Data from the Subscription Service within a reasonable time after delivery of Customer Data. For the avoidance of doubt, Customer can download Customer's documents and files stored in the Subscription Service, in the format they are stored, at any time during Customer's access to the Subscription Service. Conga may maintain Customer Data in an archived backup form for up to 12 months from expiration or termination of the Agreement which will be deleted on a rolling monthly basis.
2. The Order for the Subscription Service will identify the User types and/or edition of the Subscription Service applicable to Customer's subscriptions.

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

Definitions

"Salesforce.com Service" means the service provided by salesforce.com, inc. to which Customer must have a separate license in order to obtain or use the Subscription Service.

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service

Product Specific Terms

1. Customer is responsible for disabling or enabling Subscription Service features using the Subscription Service's settings page that grants and/or removes features and functionality either globally, per Salesforce Security Profile, or per User. Customer is responsible for managing the Users within the Salesforce Security Profiles. Customer is responsible for understanding the Subscription Service's features that are granted or disabled either globally or on a per Security Profile basis.
2. The Subscription Service does not store Customer Data. Customer acknowledges that when Customer uses the Subscription Service, Customer can make permanent changes and edits to Customer's data in Customer's Salesforce.com Service instance, including mass updates and mass deletions, just as Customer can do directly through Customer's Salesforce.com Service. Customer is solely liable and responsible for the results and outcomes of Customer's use of the Subscription Service

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

Product Specific Terms

1. Customer is responsible for disabling or enabling Subscription Service features using the Subscription Service's settings page that grants and/or removes features and functionality either globally, per Salesforce Security Profile, or per User. Customer is responsible for managing the Users within the Salesforce Security Profiles. Customer is responsible for understanding the Subscription Service's features that are granted or disabled either globally or on a per Security Profile basis.
2. The Subscription Service does not store Customer Data. Customer acknowledges that when Customer uses the Subscription Service, Customer can make permanent changes and edits to Customer's data in Customer's Salesforce.com Service instance, including mass updates and mass deletions, just as Customer can do directly through Customer's Salesforce.com Service. Customer is solely liable and responsible for the results and outcomes of Customer's use of the Subscription Service.

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

Definitions

"Conga Sign Transaction" means the sending of a single document or set of documents at one time from the Conga Sign Subscription Service for Electronic Signature to one or multiple parties in a single action regardless of whether all, part, or none of the parties sign the document.

"Customer Data" means all electronic data or information submitted by Customer to the Subscription Service.

"Electronic Signature" means an electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.

"Other Signing Parties" businesses or consumers who participate in an Electronic Signature transaction but are not the direct customer of Conga for that transaction.

"SMS Event" means SMS (cellular text) sent from the Conga Sign Subscription Service for identity authentication based on Customer's configuration and whether the SMS is delivered or read.

"Transaction Data" information collected and stored by Conga that details the circumstances surrounding the Electronic Signature transaction such as date and time, and unique identifying information of the signatories (e.g. email address, IP address, SMS number, etc.).

Product Specific Terms

1. Conga may remotely audit Customer's use of the Subscription Service to ensure such use is in accordance with the number of Users, Services Events, and SMS Events in the applicable Order(s). If Customer exceeds the authorized number of Users, SMS Events, or Service Events licensed, Conga may invoice Customer for the excess use.

2. Transaction Data will be maintained by Conga in perpetuity. Customer and Other Signing Parties may access, during the term of the Agreement for the Subscription Service, audit trail information that provides the details of the Electronic Signatures. Completed documents are returned to Other Signing Parties and Customer via email by attachment or through a link in an email to access the completed document and additionally, are returned to Customer in Customer's Salesforce.com Service, Conga Collaborate Subscription Service, or Conga Contracts Subscription Service. The Subscription Service may allow configuration to not deliver the final signed document and audit trail automatically to Customer and/or Other Signing Party and when such configuration is used by Customer, Customer is solely responsible for the delivery to Other Signing Party. The delivery of the completed documents to the Other Signing Party and back to Customer as described herein satisfies any requirement for return of Customer Data in the Agreement. Transaction Data shall not be considered Customer Data.

3. Enforceability of electronic signatures is based on the jurisdictions of the signatories. Electronic signatures are

enforceable in most common-law jurisdictions. Please be aware that not all documents are appropriate for Electronic Signature under the law of some jurisdictions (i.e. wills, real estate deeds). The Subscription Service complies with the Electronic Records and Signatures in Commerce Act (ESIGN 15 U.S.C. Chapter 96), eIDAS (910/2014/EC), and Uniform Electronic Transactions Act (UETA). Please consult legal counsel for specific information concerning the laws governing Customer's transaction. When consumers (as opposed to businesses) are participating in an Electronic Signature transaction, additional rules and regulations may require additional requirements, such as consumer consent disclosures or the consumer's affirmative consent to the use of Electronic Signature with the ability to withdraw their consent if they so choose. Conga does not warrant the enforceability or validity of electronic signatures in any particular jurisdiction or circumstance.