

Document AI with Salesforce Flow and Apex

Build AI document processing into the Flows and Apex your team already runs

What does Document AI add to Salesforce Flow?

CloudFiles is Document Automation for Salesforce, and Document AI is the part of it that runs document processes inside your org. A document arrives, Document AI reads it with OCR and large language models, classifies it, splits it if it is a bundle, extracts the data you asked for, matches it against existing records, writes it where it belongs, and holds it for review where someone has to sign off. Every one of those steps is available to Salesforce Flow as an invocable action, so AI document processing becomes part of the automation your admins already build and maintain.

This guide covers each Flow action and when to use it, the triggers, the events that report back, and a worked example on a Case attachment.

Which Flow action should I use?

Document AI gives you five ways to run a document process, plus a dataset action and an event reader. All of them appear in Flow Builder under the CloudFiles prefix.

Flow action	Use it when
CloudFiles: Process Document using AI	You want the content of a PDF, JPEG, PNG, CSV, TXT or JSON file returned to the Flow
CloudFiles: Query Document/Dataset	You want a structured answer to a plain-language question about a document or dataset
CloudFiles: Split Document using AI	A PDF bundle holds several documents and you need one file per document
CloudFiles: Document Mapper	A document should create or update a record and its child records
CloudFiles: Run Doc AI Workflow	The process has several steps, decisions or loops
CloudFiles: Create Dataset	You want to ask questions across many files and SOQL sources
CloudFiles: Get Event Details	You need the result of a run that finished as a CloudFiles event

Process Document using AI

This is the most direct way to extract text and data from PDF files into Salesforce fields with your own Flow logic. The action reads the document and returns its content to the Flow, where you assign it to variables, branch on it with Decision elements and write it with standard Flow elements. It also reads JPEG and PNG images, so a photo attached from the Salesforce mobile app goes through the same OCR step as a scanned PDF.

Query Document/Dataset

Ask a document a question in plain language, such as "What is the policy effective date?" or "Which of these types is this document: purchase order, invoice or statement?", and the Flow gets a structured answer back. That second question is document classification in a single action: follow it with a Decision element and route each type down its own path. A batch version runs the same question across many documents.

Split Document using AI

When a scan or an email attachment holds a whole packet, this action splits the PDF into one file per document, names each output file from its content, and saves the pieces as Salesforce Files. Each piece can then go to its own Mapper configuration or workflow.

Document Mapper

Document Mapper runs a saved configuration that reads a document and creates or updates a Salesforce record plus child records, for example an invoice and its line items, or an application and its services. You build configurations in the Create New Mapper Configuration dialog, where each field is described in plain language rather than drawn on a layout template, so document extraction keeps working when a sender moves things around on the page.

- Writes go through standard Salesforce DML, so validation rules and field-level security apply.
- Lookups are resolved per field by Get Existing, Create New or Call Flow Action.
- A per-field option protects values that are already on the record.
- A Document Type field classifies the document as part of the same run.
- Document sets let one run read several files.
- Mapper also runs from List View and Detail Page buttons, with no Flow needed.

Set "When automation runs finish" to "Auto approve" or to the review queue setting. Held runs show Pending Review, and a reviewer can edit cells, add rows, then choose "Approve & Write to Salesforce" or Reject. A lookup with no match or several matches always goes to review.

Run Doc AI Workflow

A Doc AI Workflow is built on a visual canvas and started from Flow with this action. Steps include Classify, Extract fields (typed fields and lists of items), Ask the document, find or search records (matching on a value, fuzzy, or AI-picked), create, update, delete, "Create Salesforce records (bulk)", run a Salesforce Flow, Decision and For each. A blank value never wipes a field. The start card checks every

object and field the workflow references, and published workflow versions are frozen, so the version in use stays as it was published. Workflows accept PDFs and Office documents.

The review policy is "Straight through", a hold on the first write, or approval on every write, and a single step can be set to "Require approval for this write", which marks that step on the canvas. Runs waiting on a person show "Awaiting review".

Create Dataset

A dataset combines files and SOQL sources and refreshes every 24 hours, 48 hours or weekly. Point Query Document/Dataset at it to ask questions across many documents and records at once, which turns unstructured data spread across an org into answers a Flow can use.

How do I trigger a document process?

- Record-triggered Flows, on an asynchronous path.
- CloudFiles events, such as a Salesforce file attached or a file uploaded.
- Screen Flows, for example a batch-upload screen.
- Mapper buttons on list views and detail pages.
- The workflow launch form.

Email-to-Case attachments are a common entry point. With CloudFiles Document Management, a file dropped into a connected folder in SharePoint, OneDrive, Google Drive, AWS S3, Azure Blob, Box or Dropbox can trigger processing too.

How do results get back to my Flow?

Results and completion come back as CloudFiles events: document-processed, document-split, document-mapper-run, dataset-created and error-event. Read them with CloudFiles: Get Event Details and carry on from there, for example notifying a record owner when a mapper run completes or opening a Task when an error-event arrives. Each run is also recorded as a CloudFiles DocAI Run record with its status (Processing, Completed, Pending Review, Failed, Rejected). Reprocessing creates a new run and keeps the old one.

Can I call Document AI from Apex?

Yes. The same invocable actions are callable from Apex, so a developer can start document processing from existing service code while admins keep building in Flow. Both paths use the same actions and produce the same events and run records, so an admin can monitor a process that a developer started in Apex.

How do I test a prompt before I build?

Open the AI Playground and try prompts on a real document before you build. The AI Playground needs Super Admin.

Worked example: extract text from PDF attachments into CRM fields on a Case

A customer emails a service request form, and Email-to-Case creates a Case with the PDF attached as a Salesforce File.

1. **Trigger.** A CloudFiles event for a Salesforce file attached starts a Flow on the Case.
2. **Split if needed.** If the attachment is a bundle, Split Document using AI saves one Salesforce File per document.
3. **Classify.** Query Document/Dataset asks which type of document each file is, and a Decision element routes service request forms to the next step.
4. **Map.** Document Mapper reads the form, updates the Case fields, creates a child record for each item requested, and resolves the Contact lookup with Get Existing, falling back to Create New.
5. **Review.** The configuration holds runs for review, so a support lead sees Pending Review, corrects a cell if needed, and chooses "Approve & Write to Salesforce".
6. **Follow up.** Get Event Details reads the document-mapper-run event and the Flow notifies the Case owner. An error-event opens a Task instead.

Get started

Install CloudFiles Document AI from AgentExchange and start a free 14-day trial or a Test Drive, or book a demo at cloudfiles.io.