

Document AI for Food and Consumer Goods Manufacturers: Supplier Quality Audits in Salesforce

Extract audit dates, schemes, scores and findings from third-party audit reports and certificates, and write them to the supplier record

CloudFiles Document AI is part of CloudFiles, Document Automation for Salesforce. This guide describes a pattern we see at food and consumer goods manufacturers that manage supplier quality in Salesforce: every supplier site has to hold current third-party audits and certificates, and the quality team has to know what each one says.

What supplier documents does a quality team handle?

A manufacturer's approved supplier program depends on documents the manufacturer does not write. Certification bodies issue audit reports and certificates under different food safety and quality schemes. Each certification body has its own report layout, and the same scheme's report can look different from one auditor to the next. Some arrive as native PDFs, some as scans, some as photographs of a printed certificate.

The quality team reads each one for the same facts: the audit date, the auditor or certification body, the scheme, the audit type, the score or grade, and the counts of findings by severity. Then they key those facts into the supplier location record. When dozens of sites renew around the same season, that keying backs up, and a supplier's status in Salesforce falls behind the paper. AI document processing inside Salesforce takes over that step: it reads each report, classifies it, extracts the facts and writes them to the supplier location record, with review where the team wants it.

How do audit reports get into Salesforce?

In this pattern, audit reports and certificates are attached to the supplier location record. There are two ways in:

- **One at a time.** A quality specialist attaches a report to the supplier location record, and the upload starts processing through a CloudFiles event.
- **In a batch.** A batch-upload screen Flow lets the specialist pick the supplier locations and upload a set of files in one pass.

Scanned reports are sent to OCR, and native PDF text is read directly. Photographed certificates in JPEG or PNG are read by Document Mapper as well.

How does the right mapper get picked for each document?

A filename rule in the Flow looks at the file name and picks the mapper configuration for that document: one configuration for full audit reports, another for certificates. Where file names are not reliable, the document can classify itself instead: a CloudFiles: Query Document/Dataset prompt asks whether the file is an audit report or a certificate, or a Document Type field in the mapper records it. A Decision step then runs the matching configuration.

What gets extracted and written back to the supplier record?

CloudFiles: Document Mapper reads the document and updates the supplier location record with:

Field	Example description in the mapper
Audit date	The date the audit was carried out
Auditor	The certification body and the lead auditor named on the report
Scheme	The food safety or quality scheme the audit was run under
Audit type	Initial, recertification, surveillance or unannounced
Score	The overall score or grade awarded
Finding counts	The number of findings at each severity level

Fields are described in plain language, with no layout templates. A new certification body's report is read by the same configuration as the old one. If the team tracks findings one by one, the same configuration can create a child record for each finding under the audit.

Lookups are resolved per field: Get Existing finds the certification body or scheme record, Create New adds one when it does not exist yet, and Call Flow Action runs the team's own logic. A per-field option that protects existing values keeps fields the quality team set by hand from being overwritten by a later document.

Writes go through standard Salesforce DML, so validation rules and field-level security apply.

Which results go to review?

In Document Mapper, "When automation runs finish" is set to "Auto approve" or to the review queue setting. A quality team can auto-approve certificates and hold full audit reports, because a score or a count of major findings can change a supplier's approval status. A held run shows Pending Review. The reviewer compares the extracted fields with the report, edits cells, adds rows, and chooses "Approve & Write to Salesforce" or Reject.

A lookup with no match or with several matches forces review regardless of the setting, so a report from an unfamiliar certification body goes to a person.

Can the team ask questions across every supplier audit?

Yes. CloudFiles: Create Dataset combines the audit files with SOQL sources, such as supplier location and supplier account records, refreshed on a schedule. CloudFiles: Query Document/Dataset then answers plain-language questions across them, for example which sites had a major finding under a given scheme, or which certificates name a certification body the program no longer accepts.

This is where unstructured documents turn into a supplier quality view the team can act on: the reports stay the source, and the answers come back structured.

What happens after the record is updated?

The supplier record now holds the facts the rest of the org needs. A record-triggered Flow can alert purchasing when a score falls below the program's line, create a task for the next audit, or change the supplier's approval status. CloudFiles Document Generation can create documents from the extracted data in the same process, such as a supplier quality summary for a sourcing review.

What is recorded for each document?

Each run is recorded in Salesforce as a CloudFiles DocAI Run record with its status: Processing, Completed, Pending Review, Failed or Rejected. Reprocessing creates a new run and keeps the old one, so a corrected report from a certification body sits alongside the original run.

Do supplier documents train the AI model?

No. CloudFiles does not train or fine-tune AI models on your documents. Document AI uses large language models and OCR.

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. A free sandbox proof of concept is offered, so the quality team can run its own audit reports and certificates through the process first.