

How to Choose an Intelligent Document Processing App for Salesforce

Ten tests to run before you pick an IDP app, and how CloudFiles Document AI answers each one

What should an intelligent document processing app for Salesforce do?

Lists of the best OCR apps for automated document and form processing tend to rank tools on reading alone. Reading is one step. An intelligent document processing (IDP) app for Salesforce has to run the whole process: a document arrives, is read, is classified, is split if it is a bundle, has its data extracted, is matched against existing records, is written where it belongs, and is held for review where someone has to sign off.

Buyers often ask whether a product is an OCR solution or an AI solution. For CloudFiles Document AI the answer is both, in order: OCR is the reading step, large language models understand the content, and Salesforce Flow drives what happens next. CloudFiles is Document Automation for Salesforce, and the ten tests below are the ones we would run on any IDP app, answered for Document AI.

1. Does it run inside Salesforce and Flow?

Document intelligence that lives outside Salesforce means another integration to build and monitor. Ask whether document processing runs as native Flow actions your admins can build with.

How CloudFiles answers: Document AI runs as Salesforce Flow actions, and the same invocable actions are callable from Apex. There are five ways to run it: Process Document using AI, Query Document/Dataset, Split Document using AI, Document Mapper and Run Doc AI Workflow. Results come back as CloudFiles events read with Get Event Details, so the next step is just more Flow.

2. Does it work without templates?

Template OCR breaks when a vendor moves a field or a value is not where the template expects it. Ask how much setup a new layout needs.

How CloudFiles answers: Fields are described in plain language, with no layout templates. Scanned and mixed pages are sent to OCR, native PDF text is read directly, and a new layout needs no new configuration.

3. Can it classify and split documents?

Unstructured documents rarely arrive one at a time. Ask how the app handles a packet with no separator sheets.

How CloudFiles answers: Split Document using AI splits a multi-document PDF into one file per document, names each file from its content, and saves the pieces as Salesforce Files. Document classification happens through a Classify step in a workflow, a Query prompt in Flow, or a Document Type field in Mapper, and a Decision step routes each type down its own path.

4. Does it write records and child records?

Extracting data into a JSON blob still leaves someone to build the records. Ask whether the app writes a parent record and its children in one run.

How CloudFiles answers: Document Mapper creates or updates a Salesforce record plus child records, for example an invoice and its line items, or an application and its services. Doc AI Workflows extract typed fields and lists of items and write them with create, update and "Create Salesforce records (bulk)" steps.

5. How does it match documents to existing records?

A document is only useful on the right record. Ask how the app finds the account, contact or vendor a document belongs to, and what happens when it cannot.

How CloudFiles answers: In Mapper, lookups are resolved per field by Get Existing, Create New or Call Flow Action, and a lookup with no match or several matches forces review. Workflow find and search steps match on a field value, by fuzzy match or by an AI-picked match.

6. Can a person review before anything is written?

Most teams want to see results before they reach production data. Ask where review happens and how granular it is.

How CloudFiles answers: In Document Mapper, "When automation runs finish" is set to "Auto approve" or to the review queue setting, and a reviewer can edit cells, add rows, then choose "Approve & Write to Salesforce" or Reject. In workflows, the review policy is "Straight through", a hold on the first write, or approval on every write, and a single step set to "Require approval for this write" shows a Requires approval badge on the canvas.

7. Is every run recorded?

Ask what an admin sees the day after a run finishes.

How CloudFiles answers: 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. Workflows keep a step-by-step history of every run, and every pause, approval and rejection is recorded.

8. Where do the documents live?

Ask whether the app forces documents into its own storage.

How CloudFiles answers: Documents live in Salesforce Files, and with CloudFiles Document Management also in SharePoint, OneDrive, Google Drive, AWS S3, Azure Blob, Box and Dropbox. A file dropped into a connected folder can trigger processing, and classified documents can be moved into the right folder with the Move Resource action.

9. Can it answer the security questions?

Ask for written answers on training, storage, encryption and certification.

How CloudFiles answers:

- CloudFiles does not train or fine-tune AI models on your documents.
- TLS 1.2 or higher in transit, AES-256 at rest.
- CloudFiles is independently audited for SOC 2 Type II and certified to ISO 27001, and is GDPR compliant.
- Security documents are available under NDA from the CloudFiles Trust Center.

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

10. Will it prove itself on your own documents?

A demo on the vendor's sample files proves little. Ask for a proof of concept on your documents, in your org.

How CloudFiles answers: A free sandbox proof of concept is offered, alongside a free 14-day AppExchange trial and a Test Drive. The AI Playground lets a Super Admin try prompts on a real document before building.

What about insights across unstructured Salesforce data?

The best AI tools to glean insights from unstructured Salesforce data go past one document at a time. CloudFiles: Create Dataset combines files and SOQL sources, refreshed every 24 hours, 48 hours or weekly, and Query Document/Dataset asks it questions in plain language and returns structured answers to a Flow. Unstructured data across many documents and records becomes something your automation can act on.

The checklist

Test	CloudFiles Document AI
Native to Salesforce and Flow	Flow actions, callable from Apex
No templates	Plain-language field descriptions
Classify and split	Classify step, Query prompt, Document Type field, Split Document using AI
Records and child records	Document Mapper and workflow create steps
Matching	Per-field lookups, fuzzy and AI-picked match
Review before write	Review queue, workflow review policy, per-step approval
Run records	CloudFiles DocAI Run records with status
Document storage	Salesforce Files plus connected storage
Security answers	Published wording, documents under NDA
Proof on your documents	Free sandbox proof of concept

Teams run these tests when replacing template-based OCR tools, a MuleSoft IDP project or a custom build, and Document AI passes every one inside a single managed package with implementation and support included.

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.