

Purchase Order PDFs Filed to the Procurement Folder

Generate the purchase order PDF when the record is saved, file it in SharePoint, and link it back to the record.

The situation: the purchase order is in Salesforce, the filing rule is in SharePoint

Operations and procurement teams in manufacturing, distribution, construction and field services raise purchase orders in Salesforce, usually on a Purchase Order object with its own line items. Finance and the supplier-facing team work from SharePoint, and the filing rule is that every purchase order PDF sits in the procurement folder for that order. By hand, that is four steps per order: produce the document, download it, upload it to the right folder, and paste the link back on the record.

CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce, turns that into one step that nobody has to perform. When the purchase order is saved, a flow generates the PDF, writes it into the SharePoint folder held on the record, and puts the link on the record.

How do you generate purchase order PDFs from Salesforce automatically?

1. The object and its data

The master record is the purchase order, standard or custom. The template reaches:

- Purchase order fields: number, order date, required date, delivery terms and payment terms.
- The supplier's name and address through the supplier lookup, and the ship-to details, using multi-level relationship paths.
- The purchase order lines as related records, with item, description, quantity, unit price and line total.
- The running user or the approver, so the document names who raised it.

2. The template, built in Word

The purchase order is a Word template built with the CloudFiles Office add-in:

- The letterhead, logo and company details, with custom fonts that survive conversion to PDF.
- A line-item table that repeats one row per purchase order line, sorted by line number.
- Currency and number patterns with group and decimal separators, and locale formatting, so amounts read correctly for the supplier's country.
- An order total built with SUM over the lines.

- Conditional terms: a block of terms that appears only for a certain supplier type or region. When the condition is false the block is removed, with no gap.

Build, preview against a real purchase order, then publish.

3. The trigger

A record-triggered flow runs when the purchase order is saved with the conditions your process sets, for example when the status is Approved. Entry conditions decide which saves produce a document, so a draft does not generate one and a revised order can. Record-triggered flows call the CloudFiles actions on an asynchronous path.

4. The Flow action

On that asynchronous path, the flow calls Generate Document (Sync) with the purchase order and the template, and PDF as the output. The action returns the document, its Content Version Id, a Download URL and a Preview URL in the same flow, which is what makes the next step possible.

5. Where the file goes

With CloudFiles Document Management in the same package, each purchase order has its own folder in SharePoint, and the generated PDF is written straight into it. The flow then writes the returned link onto a field on the purchase order, so anyone on the record can open the filed document in one click. The same pattern works with OneDrive, Google Drive, Box or Dropbox if that is where the team files documents.

What happens after the purchase order is filed?

- Finance sees the purchase order in the procurement folder, in the location the filing rule expects, without anyone uploading it.
- The flow can put the Download URL into an email alert to the supplier contact, since CloudFiles returns links and leaves the sending to your Flow.
- For a purchase order the supplier must acknowledge, the Word template can carry DocuSign Signature, Text and Date Signed form fields and go out through your own DocuSign account. The signed PDF returns to the record or its folder, and a document-signed event lets a flow update the status.
- PDF protection can set an owner password from a Flow formula and disable editing, while allowing printing, so the supplier receives a document they can print but not change.

Why operations teams choose this pattern

- The template is a Word document that the procurement team can read and adjust, so a change to the terms is a document edit rather than a development ticket.
- Generation and document storage come from one vendor in one package, so the PDF goes straight to the folder that CloudFiles already manages for the record.

What to set up

- Install CloudFiles from AgentExchange with Document Management connected to SharePoint.
- Install the CloudFiles Office add-in from Microsoft AppSource and build the purchase order template in Word.
- Preview against a purchase order with several lines, then publish.
- Build the record-triggered flow with its entry conditions, call Generate Document (Sync) on the asynchronous path, and set the record's SharePoint folder as the destination.
- Add an update step that writes the returned link to a field on the purchase order.
- Add an email alert with the Download URL if suppliers should receive the order by email.

Each generated document uses one credit.

Get started

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