

Salesforce Document Generation Guide

Generate PDF, Word, Excel and PowerPoint documents from any Salesforce record, by hand or by Flow

CloudFiles is Document Automation for Salesforce: one managed package, installed from AgentExchange, that brings Document Management and Document Generation into the org. This guide covers CloudFiles Document Generation, the part that turns Salesforce records into finished PDF, Word, Excel and PowerPoint documents. It explains how templates are built, which outputs each format produces, how users generate documents from a record page, how Salesforce Flow automates document generation, how DocuSign fits in, and where every generated file goes.

What is CloudFiles Document Generation?

CloudFiles Document Generation merges Salesforce data into templates and produces a finished document. Salesforce admins often call it docgen. The templates live in Microsoft Word, Excel and PowerPoint, which the business already knows, or in fillable PDF forms. Admins and business users build and maintain them without code, and the same templates work from a record page, from Salesforce Flow and from Apex.

Document generation works on any standard or custom object. Teams generate dynamic documents from Salesforce custom objects as easily as from Accounts, Opportunities, Quotes, Cases or Work Orders, because a template is tied to the object you choose when you build it.

Which document formats can I generate?

Every template format has its own strengths, and every format can produce a PDF.

Template	What the template supports	Output
Word	Fields, conditions, tables, pictures, loops, links, DocuSign form fields	DOCX or PDF
Excel	Fields and tables	XLSX or PDF
PowerPoint	Fields and pictures	PPTX or PDF
Fillable PDF	Text fields, conditional checkboxes, DocuSign form fields	PDF

Conditions and loops are Word features, so documents that need clauses to appear or disappear are built in Word. Merged output, where several files are combined into one, is always PDF. Macro-enabled

Word templates (.docm) work too.

How do I build a document template?

Word, Excel and PowerPoint templates in the Office add-in

The CloudFiles Office add-in installs from Microsoft AppSource and signs in to a production or sandbox org. Inside Word, Excel or PowerPoint, the add-in shows the fields of the chosen object and inserts them where you click. Tables, conditions, pictures and formatting are added the same way, from panels in the add-in, so the document looks in the editor the way it will look when generated.

Fillable PDF templates in the PDF editor

For forms that already exist as PDFs, such as W-9 style forms or court and state forms, upload the fillable PDF to the in-app PDF template editor and map each form field to Salesforce data. The layout of the original form stays exactly as it was.

Build, Preview, Publish

Every template goes through three steps: Build, Preview, Publish. Preview generates the document against a real record so you can check it, and Publish is enabled only after a successful preview. Template tags keep a large library tidy: filter templates by tag, with match any or match all.

What Salesforce data can a template merge?

A template can merge data from several sources at once:

- The master record the document is generated from
- The running user, for sender names, titles and signatures
- Multi-level relationship fields, in Account.Owner.Name style paths
- Related records, such as opportunity line items, quote line items, contacts or cases
- Runtime variables, filled in by the user or passed by a flow
- Constants that stay the same on every document

Record Single and Record Collection resources shape related data before it reaches the document. Each supports filters with AND, OR and custom logic, a sort order and a row limit. A record collection with group by can total line items by product family and apply SUM, AVG, MIN, MAX or COUNT to each group. Formatting covers text case, date presets (Short, Medium, Long, Full) and custom patterns, number and currency patterns, group and decimal separators, locale and timezone. Rich text fields render, and custom fonts embedded in the Word template survive PDF conversion.

How do users generate documents from a record page?

The CloudFiles Doc-Gen component sits on the Lightning record page and lists the published templates for that object, with search. A user picks a template, generates the document and then chooses what happens next: download it, copy it to Salesforce Files, copy it to external storage, or send it for signing.

When a template has runtime variables, the component shows a "Fill in Document Details" form first, so the user can add a discount note, a delivery date or a choice of clauses before the document is generated.

How does document generation work in Salesforce Flow?

CloudFiles is built for Salesforce Flow. Five actions appear in Flow Builder, and each can also be called from Apex:

- **Generate Document** runs asynchronously. Completion arrives as a document-generated event that a record-triggered or platform-event flow picks up.
- **Generate Document (Sync)** returns the document, its Content Version Id, name, Download URL and Preview URL in the same flow. It suits screen flows and chained steps.
- **Generate Document (Batch)** produces a collection of documents in one action, from Flow, Batch Apex, future or queueable contexts, with one event per document.
- **Merge Documents (Sync)** combines PDF, DOCX, PNG and JPEG files into one PDF, in the order given.
- **Get Doc-Gen Templates** lists templates by object and tags, and can return each template's runtime variables so a screen flow can offer a template picker.

Typical triggers are a button or quick action that opens a screen flow, a record-triggered flow on a status or stage change such as Closed Won, a scheduled flow, or a CloudFiles event such as a folder being created or copied. Each generated document uses one credit.

There is no separate email step to configure: the Sync action returns a Download URL and a Preview URL that a flow places straight into an email alert.

Can generated documents go out for DocuSign signature?

Yes. CloudFiles connects to your own DocuSign account under Document Generation, Integrations. Recipients come from Salesforce fields (name and email) and are typed as Signer or Carbon Copy. Signature fields are placed in the template: Word supports Signature, Text and Date Signed, and PDF templates support Signature, Initial Here, Text, Date Signed and Checkbox. Signing order and envelope Brand ID are set in Signing Settings.

Users send from the record page with Send for Signing or from template preview, and flows and Apex send automatically. Batch generation can combine several documents into one envelope. When the envelope is completed, the signed file comes back to the record or its destination, and a document-signed event lets a flow update a status, notify the owner or file the document.

Where do generated documents go?

By default the output is saved as a Salesforce File linked to the record. With CloudFiles Document Management in the same package, output can go to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox, so the generated contract lands next to everything else about that deal.

PDF output can carry a view password and an owner password, both settable from a Flow formula, with editing disabled and printing and form filling allowed. A retention period in minutes deletes the file after that time.

Which documents do Salesforce teams generate?

Quotes, proposals, contracts, NDAs, invoices, statements, receipts, certificates, transcripts, purchase orders, work order and inspection reports, letters, onboarding packs, and government and court forms as fillable PDFs. Buyers are Salesforce admins and architects, operations and RevOps leaders, and IT.

Why is CloudFiles the best app for automated document generation from records?

- Templates live in Word, Excel and PowerPoint, so admins and business users maintain them without code.
- A false condition removes the line cleanly instead of leaving a gap.
- PowerPoint and Excel output sit alongside Word and PDF.
- One vendor covers document generation and document storage.
- Flat pricing rather than per-document charges.
- Implementation help and 24x7 support are included.

How is document data protected?

Independently audited for SOC 2 Type II, certified to ISO 27001, ISO 27017 and ISO 27018, and compliant with HIPAA and GDPR. Document processing runs in CloudFiles' AWS environment, in the data-residency region you choose: United States, European Union, United Kingdom or Australia. TLS 1.2+ in transit, AES-256 at rest. Security documents are available under NDA from the CloudFiles Trust Center.

Get started

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