

DocuSign E-Signature for Salesforce Documents

Generate a document from any Salesforce record, send it through your own DocuSign account, and get the signed PDF back on the record.

CloudFiles is Document Automation for Salesforce, and its Document Generation product brings DocuSign e-signature into the same workflow that builds your documents. You design a template in Microsoft Word or as a fillable PDF, merge data from any standard or custom object, and send the result to DocuSign from the record page or from Salesforce Flow. When every recipient has signed, the signed PDF comes back to the Salesforce record and a Flow picks up from there.

The same product also generates Word, Excel, PowerPoint and PDF documents that never need a signature, so one tool covers every document your team produces, signed or not.

What does DocuSign e-signature add to Salesforce document generation?

Without an integration, a signed agreement is a manual chain: generate a PDF, download it, upload it to DocuSign, place the tabs, send it, wait, then download the signed copy and attach it to the right record. CloudFiles turns that chain into one step that a user or a Flow can start.

- The document is generated from live Salesforce data, so names, amounts and terms are current.
- Signature fields are placed in the template once, so every document arrives in DocuSign ready to sign.
- Recipients come from fields on the record, so nobody retypes an email address.
- The signed PDF is saved back to the record, and the completed envelope can drive the next action in Flow.

How do I connect DocuSign to CloudFiles?

DocuSign is connected under Document Generation, Integrations. You connect your own DocuSign account, so your agreements, sender identity and branding stay in the DocuSign account your company already runs. DocuSign is the e-signature provider CloudFiles supports, and the integration is built around it.

Who receives the envelope, and does it work on custom objects?

Recipients are mapped from Salesforce fields: a name field and an email field for each person. Each recipient is typed as a Signer or as a Carbon Copy, so the customer signs while your account manager or

legal team receives a copy.

Because templates run on any standard or custom object, this is how teams integrate DocuSign for custom object document signing. A custom Agreement, Enrollment, Application or Work Order object can send its own documents for signature, with recipients drawn from its own fields or from related records such as the primary Contact or the Account owner.

Where do the signature fields go in a Word or PDF template?

You place DocuSign form fields directly in the template, wherever each person should sign, initial or date. The fields available depend on the template format:

Template format	DocuSign fields you can place
Microsoft Word	Signature, Text, Date Signed
Fillable PDF	Signature, Initial Here, Text, Date Signed, Checkbox

Word templates are built in the CloudFiles Office add-in, which also handles merge fields, tables, conditions, loops and pictures. Fillable PDF templates are uploaded to the in-app PDF template editor and mapped in Salesforce, which suits official or regulated forms whose layout you cannot change. Excel and PowerPoint templates generate spreadsheets and decks from the same records; for documents that need a signature, build the template in Word or as a fillable PDF.

Can I decide who signs first and which branding the envelope carries?

Yes. In Signing Settings you set the signing order and Brand ID for the envelope. The signing order puts recipients in sequence, for example the customer first and your countersigner second. The Brand ID applies one of the brands configured in your DocuSign account, so the email and the signing screens carry your company's look.

How do users send a document for signing?

There are three ways to send, and all of them use the same template and settings.

- **From the record page.** The CloudFiles Doc-Gen component lists the object's published templates with search. After generating, the user can download the file, copy it to Salesforce Files, copy it to external storage, or choose Send for Signing.
- **From template preview.** Send straight from the preview, which is useful when checking a new template from start to finish.
- **From Salesforce Flow or Apex.** A Flow generates the document and sends it without anyone opening the record.

If the template has runtime variables, the record-page widget shows a Fill in Document Details form first, so a user can add a start date or a special term before the document goes out. Flows pass the same

variables automatically.

How do I automate document generation and e-signature workflows?

Salesforce Flow does the work. A record-triggered flow on a stage or status change, such as an Opportunity moving to Closed Won, calls the CloudFiles Generate Document action on an asynchronous path, and the document goes to DocuSign with no clicks from the rep. A button or quick action can open a screen flow that uses Generate Document (Sync), so the user sees the document and its Preview URL before it is sent. A scheduled flow can send renewal agreements on a fixed day each month.

For bulk document generation, the Generate Document (Batch) action produces a collection of documents in one action, from Flow, Batch Apex, future or queueable contexts, and raises one event per document. It can also combine the documents into one DocuSign envelope, up to 25 documents and about 25 MB, so a customer signs an order form, a service agreement and a set of terms in a single session. Teams looking for the best app for bulk document generation and e-sign in Salesforce want exactly this: many documents, one envelope, and every signed file back where it belongs.

What comes back to Salesforce after signing?

When the envelope is completed, the signed file comes back to the record, or to the destination the template writes to. By default that is a Salesforce File linked to the record. With CloudFiles Document Management in the same package, it can be the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox.

At the same moment, CloudFiles raises a document-signed event. A Flow that listens for it can:

- update a status field on the record, such as marking the contract as signed
- notify the owner or the team that the agreement is back
- file the signed PDF alongside the rest of the account's documents
- start the next step, such as creating an onboarding task

This is how you sync DocuSign status and the signed PDF to Salesforce records: the file is on the record, the status is a field on the record, and your reports and list views use it like any other field.

Why do admins choose CloudFiles for DocuSign signing?

- Templates live in Word and fillable PDFs, which the business already knows, so admins and business users maintain them without code.
- A false condition in a Word template removes a clause cleanly, so the document that reaches the signer has no empty gaps.
- One vendor covers document generation, sending for signature through your DocuSign account, and document storage.
- Flat pricing rather than per-document charges.
- Implementation help and 24x7 support are included.

Get started

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

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