

Certificates and Transcripts on Demand, for Education Teams on Salesforce

Produce a certificate, transcript or statement of attainment from the enrolment record, with a link ready to share.

The situation: every completion needs a document, and learners want it now

Colleges, universities, training providers and professional bodies run their enrolments in Salesforce, often on the Program Enrollment object or on a custom enrolment object of their own. Every learner who completes a program needs a certificate. Many also need a transcript of their units and results, or a statement of attainment for a partial completion. When those documents are produced by exporting data and editing a Word file, the registrar's office becomes the queue, and learners wait for a document the system already has every fact for.

CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce, lets staff produce each of these on demand from the enrolment record, in a few clicks, as a finished PDF with a link they can share straight away.

How do you automate document generation from custom objects?

CloudFiles templates work on any standard or custom object, so the pattern below applies whether enrolments live on Program Enrollment or on an object your team built.

1. The object and its data

The master record is the enrolment. From it the templates reach:

- The learner's name and details through the related Contact.
- The program name, start date and completion date.
- The running user, so the document can name the staff member who issued it.
- Related records such as unit or course enrolments, each with its result, grade and credits.

2. The templates, one per document

Each document is its own template, and each is published only after a successful preview.

- **The certificate.** A single designed page with the learner's name, the program, the award date in a Long date format, the institution's logo and a stored signature image of the signatory, placed as a picture from a Salesforce file. Custom fonts embedded in the Word template survive PDF conversion, so the

certificate keeps its typography. Some teams design the certificate in PowerPoint instead, since it is one designed page; PowerPoint templates support fields and pictures and produce PPTX or PDF.

- **The transcript.** A Word template with a table that repeats one row per unit, sorted by term, with the grade and credits on each row. A summary line totals the credits using SUM on a Record Collection resource.
- **The statement of attainment.** A Word template whose table is filtered to the units the learner has completed, with a conditional paragraph that appears only when the program is partially complete.

Tag all three templates for the enrolment process so the template list on the record shows exactly these.

3. The trigger

A button or quick action on the enrolment record opens a screen flow. Staff choose which document to issue. If the flow uses Get Doc-Gen Templates, the choice is built from the live list of published templates for the object, so a new template appears in the picker without anyone editing the flow.

4. The Flow action

The screen flow calls Generate Document (Sync). If a template has runtime variables, such as an issue date or an award title that is not stored on the record, the flow collects them on a screen first. Because the action is synchronous, it returns the document, its Content Version Id, its name, a Download URL and a Preview URL in the same flow. The last screen shows the preview link, so staff can check the document before it goes anywhere.

5. Where the file goes

The PDF is saved as a Salesforce File linked to the enrolment record. With CloudFiles Document Management, it can go to the learner's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox instead.

How do learners receive the certificate?

CloudFiles returns the link; your Flow decides where it goes. The flow puts the Download URL into an email alert to the learner, or writes it to a field so a later process can use it. Staff can also download the PDF from the CloudFiles Doc-Gen component on the record page.

For documents that must not be altered, PDF protection sets an owner password and disables editing while still allowing printing. Both passwords can come from a Flow formula. The preview can also control whether a viewer may download or print.

Why education teams choose this approach

- Templates live in Word and PowerPoint, which registry and marketing staff already know, so they can update a certificate design without asking a developer.
- One enrolment record produces every completion document, so the certificate, the transcript and the statement always agree with each other.

What to set up

- Install CloudFiles from AgentExchange and the CloudFiles Office add-in from Microsoft AppSource.
- Build and preview the certificate, transcript and statement templates, then publish them.
- Build the screen flow with Generate Document (Sync), and add it as a quick action on the enrolment record.
- Screen flows run as the user, so give registry staff a permission set with access to the CloudFiles generation actions.
- Add an email alert that carries the Download URL, if learners should receive the document 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.