

A Print Documents Button for Real Estate Transaction Forms

One button on the Opportunity that produces the transaction's Word documents and state forms as PDFs, with preview links.

The situation: one transaction, a stack of forms

Brokerages, title and escrow companies and property managers track each transaction as an Opportunity in Salesforce. Every transaction needs a set of documents: the brokerage's own agreements and disclosures, a transaction summary, and state-mandated forms that have to be used in their official layout. The data for all of them is already on the Opportunity and its related records. Agents and transaction coordinators still fill many of them in by hand, form by form, and retype the same buyer, seller, property and price on each one.

CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce, puts one Print Documents button on the Opportunity. The user picks the forms the transaction needs, and each one comes back as a finished PDF on the record.

How do you generate multiple documents from one Salesforce record?

1. The object and its data

The master record is the Opportunity. The templates reach:

- Opportunity fields: property address, price, key dates, transaction type.
- Buyer and seller details through related contacts, and the agent through the owner, using relationship paths.
- Related records such as contingencies or inspection items.
- Values that are not stored anywhere, such as an offer expiry, collected at run time.

2. The templates: Word documents and a fillable state form

- **Word templates** for the brokerage's own documents, built in the CloudFiles Office add-in. Conditional sections handle the variations: a homeowners' association section that appears only when the property has one, or a disclosure block that appears only for a certain property type. When a condition is false, the section is removed cleanly.
- **A fillable PDF template** for the state form. The official PDF is uploaded to the in-app PDF template editor and its fields are mapped to Salesforce fields in the editor, so the data is overlaid on the state's

own layout. PDF templates support text fields and checkboxes that are ticked when a condition on the record is met.

Every template is previewed against a real Opportunity before it is published, and each carries template tags, such as the transaction type or the state, so the list can be filtered.

3. The trigger

A quick action labelled Print Documents on the Opportunity opens a screen flow.

4. The Flow actions

- **Get Doc-Gen Templates** lists the published templates for the Opportunity object, filtered by tags. It can return each template's runtime variables, so the flow knows which extra values to ask for.
- The first screen shows the live template list as a checklist. The user ticks every form this transaction needs. Because the list comes from the published templates, a newly published form appears on the button the same day, with no change to the flow.
- A second screen collects any runtime values the selected templates need.
- The flow loops over the selection and calls **Generate Document (Sync)** for each template, with PDF as the output. Each call returns a Download URL and a Preview URL.

5. Where the files go

Each PDF is saved as a Salesforce File linked to the Opportunity. The final screen lists every document with its preview link, so the user can check each form before printing or sending. With CloudFiles Document Management, the files can go to the transaction's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox.

What is the natural next step: signing?

Most transaction documents need signatures, and signing is a natural next step with DocuSign, using the brokerage's own DocuSign account. Word templates support DocuSign Signature, Text and Date Signed form fields, and PDF templates support Signature, Initial Here, Text, Date Signed and Checkbox fields, so a state form can carry its signature and initial fields where the form expects them. Recipients come from Salesforce fields, typed as Signer or Carbon Copy. Generate Document (Batch) can combine the selected documents into one DocuSign envelope, so the parties sign the whole set at once. When the envelope is completed, the signed files come back to the Opportunity, and a document-signed event lets a flow update the transaction status.

Why transaction teams like this button

- One click replaces a form-by-form routine, and the same data appears the same way on every document.
- The brokerage's documents stay in Word, which the office already edits, and the state forms stay in their official PDF layout.

- The button grows with the business: publish a new template with the right tag and it is on the list.

What to set up

- Install CloudFiles from AgentExchange and the CloudFiles Office add-in from Microsoft AppSource.
- Build the Word templates in the add-in, and upload each state form to the PDF template editor and map its fields.
- Tag the templates, preview each against a real Opportunity, and publish.
- Build the screen flow with Get Doc-Gen Templates, the checklist screen, the runtime values screen and a loop of Generate Document (Sync) calls.
- Add the flow to the Opportunity as a Print Documents quick action.
- Screen flows run as the user, so give agents and coordinators a permission set with access to the CloudFiles generation actions.

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.