

Field Inspection Reports with Photos, Generated in Salesforce

Turn a completed Work Order, its site data and its visit photos into a finished PDF report on the record.

The situation: inspections finish in the field, reports finish at a desk

Field service teams in utilities, facilities and property maintenance run inspections from Salesforce. A technician completes the Work Order, records readings and findings, and uploads photos from the visit. The report the customer or regulator receives is often still assembled by hand: someone types the site details into a Word file, drags in the photos, saves a PDF and attaches it back to the record.

CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce, removes that step. The team builds one Word template for the inspection report, and a Salesforce Flow generates the finished PDF from the Work Order as soon as the inspection is complete. The report lands on the record it describes.

How do you generate PDF documents from Salesforce records automatically?

The pattern has five parts.

1. The object and its data

The master record is the Work Order. The template reaches everything around it:

- Work Order fields such as the number, the completion date, the assigned technician and the findings.
- Relationship fields several levels deep, such as the account name or the site address, written as paths in the style of Account.Owner.Name.
- Related records, such as the readings or checklist items held against the site or the Work Order.
- The site-visit photos, stored as Salesforce Files or referenced by a URL field.

2. The template, built in Word

The template is an ordinary Word document built with the CloudFiles Office add-in. Admins insert fields, tables and pictures from a side panel, with no code:

- A header with the company logo, placed as a picture from a Salesforce file.
- A summary block with the site, the inspection date in a Long date format, and the technician's name.

- A table that repeats one row per reading or checklist item, sorted and filtered, for example to list only the items marked as failed.
- A photo section that repeats a picture for each site-visit photo.
- A conditional section that appears only when the inspection has open defects. When the condition is false, the section is removed cleanly, with no blank gap in the report.

The team previews the template against a real Work Order, then publishes it. Publish is enabled only after a successful preview, so a broken template never reaches the field.

3. The trigger

A record-triggered flow runs when the Work Order status changes to Completed. Record-triggered flows call the CloudFiles generation actions on an asynchronous path, which keeps the save fast for the technician.

4. The Flow action

The flow calls the Generate Document action with the Work Order, the inspection template and PDF as the output format. Generation runs asynchronously, and when the document is ready CloudFiles raises a document-generated event. A second flow that runs on that event can update a status field or notify the service manager that the report is ready.

5. Where the file goes

The PDF is saved as a Salesforce File linked to the Work Order. Teams that also use CloudFiles Document Management can send it to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox, so the report sits with the rest of the job's documents.

What happens after the inspection report is generated?

The report is now a file on the record, so the rest of the process can pick it up:

- The service manager opens it from the CloudFiles Doc-Gen component on the Work Order to preview it, download it or copy it to external storage.
- If the customer has to sign off the inspection, the same Word template can carry DocuSign Signature, Text and Date Signed form fields, and the report goes out through the team's own DocuSign account. When the envelope is completed, the signed PDF comes back to the record.
- If the report needs to be locked, PDF protection adds an owner password and disables editing while still allowing printing.

Can one template handle every inspection type?

One Word template usually covers a whole family of inspections, because conditional sections show or hide entire blocks by inspection type. Where two inspection types are very different, teams publish a separate template for each and filter them with template tags, so staff see only the templates that apply

to the Work Order in front of them. The same template can also produce a DOCX, and Excel or PowerPoint templates can sit beside it.

What to set up

- Install CloudFiles from AgentExchange, then install the CloudFiles Office add-in from Microsoft AppSource and sign it in to your sandbox.
- Build the inspection template in Word: the fields, the readings table, the repeating photos and the defect condition.
- Preview against a completed Work Order that has photos attached, then publish.
- Build the record-triggered flow on Work Order status, with the Generate Document action and PDF as the output.
- Add the CloudFiles Doc-Gen component to the Work Order page so staff can produce a report on demand.
- Move the template from sandbox to production once the flow is tested.

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.