

Document AI for Public Sector and Transportation Agencies: Application Intake in Salesforce

AI document processing that reads scanned and uploaded application forms and creates complete records, with review that follows the agency's own process

CloudFiles Document AI is part of CloudFiles, Document Automation for Salesforce. This guide describes a pattern we see at public sector and transportation agencies that run their programs in Salesforce: applications arrive as paper and PDF forms, and intake staff turn each one into a record before the application can move.

What do application forms look like at an agency?

The forms vary by program. A transit agency receives rider applications for reduced-fare and paratransit services. A public benefits program receives injury-support applications. A service agency receives service authorizations that list the services a person is approved for. The forms arrive by mail and are scanned, come in by fax, are uploaded through a portal, or are photographed by a caseworker in the field.

Intake staff read each form and re-key every field into Salesforce: applicant details, addresses, eligibility answers, requested services, signatures and dates. The same form can come in on several versions of the layout, and older versions stay in circulation. Manual data entry is the step that holds the queue up. Application forms are unstructured documents, and intelligent document processing inside Salesforce reads them without a template per form version.

How does a scanned application become a record?

In this pattern, CloudFiles: Document Mapper reads the application and writes it to Salesforce.

1. **The form is read.** Mapper reads PDFs and images (JPEG and PNG). Scanned and faxed pages are sent to OCR, and native PDF text is read directly.
2. **Every field is extracted.** A saved mapper configuration describes each field in plain language: "applicant's date of birth", "mobility device used", "services requested". There are no layout templates, so an old version of the form and a new one are read by the same configuration.
3. **A record is created or updated.** Mapper creates the application record, or updates it if one exists, with every field. Child records are created in the same run, for example an application and each of the services it requests.

4. **The file is attached.** The original form is attached to the record, so the reviewer sees the source next to the fields.
5. **A processing status is set.** The record carries a status the agency defines, such as Received, In Review or Ready for Eligibility.

Writes go through standard Salesforce DML, so the agency's validation rules and field-level security apply to every record Mapper writes.

How is the mapper configured for our forms?

Configurations are built in the new configuration dialog, inside Salesforce. An admin names the target object, lists the fields and describes each one in plain language. Lookups are resolved per field: Get Existing finds the existing applicant or program, Create New adds one when none exists, and Call Flow Action runs the agency's own logic. A per-field option that protects existing values keeps a caseworker's corrections from being overwritten when a form is processed again.

When an applicant sends several files, such as the application plus a supporting letter, a document set lets one run read them together.

Can intake staff run it from a list view?

Yes. Mapper runs from List View and Detail Page buttons. An intake worker can select a batch of new application records in a list view and run the mapper across them, or open a single record and run it from the page. The process can also start on its own:

- when a file is uploaded to a record, through a CloudFiles event,
- when an application arrives by email, through Email-to-Case,
- from a screen Flow that walks an intake worker through an upload.

How does review follow the agency's own process?

Agencies decide who signs off, and Document AI follows that decision. In Document Mapper, "When automation runs finish" is set to "Auto approve" or to the review queue setting. With review on, a finished run shows Pending Review. The reviewer compares the extracted fields with the attached form, edits cells, adds rows for services that need adding, and chooses "Approve & Write to Salesforce" or Reject.

A lookup with no match or with several matches forces review regardless of the setting, so an applicant who might already exist under a different spelling goes to a person rather than into a duplicate record.

Around the review, the agency's own screens take over. The review steps, eligibility screens and approval chains the agency already built in Salesforce stay in place, and Document AI hands them a complete record to work with.

What if one inbox receives several kinds of application?

Classification handles that. A Document Type field in Mapper records what each form is, or a CloudFiles: Query Document/Dataset prompt in Flow asks the document to classify itself. A Decision in Flow then runs the right mapper for a rider application, an injury-support application or a service authorization.

What is recorded for each application?

Each run is recorded in Salesforce as a CloudFiles DocAI Run record with its status: Processing, Completed, Pending Review, Failed or Rejected. Reprocessing creates a new run and keeps the old one, so an application processed twice shows both runs.

Where do the application files live?

In Salesforce Files by default. With CloudFiles Document Management, files can live in SharePoint, OneDrive, Google Drive, AWS S3, Azure Blob, Box or Dropbox, and a file dropped into a connected folder can trigger processing.

How is applicant data handled?

CloudFiles does not train or fine-tune AI models on your documents. Document AI uses large language models and OCR. Your files are stored in the data-residency region you choose: United States, European Union, United Kingdom or Australia. Security documents are available under NDA from the CloudFiles Trust Center.

Get started

Install CloudFiles Document AI from AgentExchange and start a free 14-day trial or a Test Drive, or book a demo at cloudfiles.io. A free sandbox proof of concept is offered, so the agency can run its own forms through the process first.