

Salesforce Document Generation: Security and Permissions

Where documents are processed, how they are protected, and how admins control who generates and publishes.

A security review of a document generation app comes down to three questions: where is the data processed, how is it protected, and who can do what. CloudFiles is Document Automation for Salesforce, and this data sheet answers those questions for its Document Generation product, which produces PDF, Word, Excel and PowerPoint documents from Salesforce records. Secure document generation means clear answers on all three, and CloudFiles gives them.

What security standards does CloudFiles meet?

Independently audited for SOC 2 Type II, certified to ISO 27001, ISO 27017 and ISO 27018, and compliant with HIPAA and GDPR.

Security documents are available under NDA from the CloudFiles Trust Center, so your security team can review the evidence directly rather than relying on a summary. Ask for them during procurement, and your reviewers can check each control in this data sheet against the source documents.

Where are documents processed?

Document processing runs in CloudFiles' AWS environment, in the data-residency region you choose: United States, European Union, United Kingdom or Australia.

Choosing the region up front lets you keep document processing where your policies require it, whether your org serves customers in North America, Europe, the United Kingdom or Australia.

How is data encrypted?

TLS 1.2+ in transit, AES-256 at rest.

How do I create a password protected PDF?

Every PDF that CloudFiles generates from a Word, Excel, PowerPoint or PDF template can carry protection settings:

- **View password:** the reader must enter it to open the PDF.

- **Owner (editor) password:** required to change the document's permissions.
- **Passwords from a Flow formula:** both passwords can be set from a Flow formula, so each document gets its own password built from values on the record.
- **Disable editing:** the recipient can read the PDF but not change it.
- **Allow printing and form filling:** keep printing and form filling available where the recipient needs them.

A password protected PDF suits statements, invoices, HR letters, certificates, transcripts and any document that travels outside the company by email.

Can I control downloads and printing in preview?

Yes. The document preview can allow or block download and print, so a user can check a document on screen without taking a copy away. This is useful for reviewers who need to approve wording but should not keep a file.

Can a generated file delete itself after use?

Yes. Set retention in minutes, and CloudFiles deletes the file after that time. Documents that only need to exist long enough to be viewed or handed on do not stay behind.

Which document generation permissions do users need?

Document generation permissions are managed with the permission sets and flows your admins already use.

- **Record page.** The CloudFiles Doc-Gen component lists the object's published templates, with search. Templates still in Build or Preview do not appear to users. Each object shows its own templates, so a Case offers case letters while an Opportunity offers quotes and contracts.
- **Screen flows.** Screen flows run as the user, so give users a permission set with access to the CloudFiles generation actions. Good practice is one permission set for each group that generates documents, such as sales, finance or operations.
- **Record-triggered flows.** Record-triggered flows call the CloudFiles actions on an asynchronous path, so documents are produced in the background when a status or stage changes.
- **Scheduled and batch runs.** A scheduled flow or Batch Apex can call Generate Document (Batch) for a collection of records, with one event per document.

Because generation runs through Salesforce Flow, the same change management your team applies to flows applies to document generation.

Who decides when a template goes live?

Every template goes through three stages: Build, Preview and Publish. Publish is enabled only after a successful preview, so no template reaches users until it has produced a correct document from real data. Only published templates are listed in the record-page component.

The CloudFiles Office add-in signs in to a production or sandbox org, so template authors can build and preview in a sandbox first. Templates are built in Word, Excel and PowerPoint, or uploaded as fillable PDFs to the in-app PDF template editor where fields are mapped in Salesforce.

Where do generated files live?

By default, each document is saved as a Salesforce File linked to the record, alongside the rest of the record's files. With CloudFiles Document Management in the same package, output can go to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox. From the record-page widget a user can download the file, copy it to Salesforce Files, copy it to external storage, or send it for signing.

How does e-signature fit the security model?

CloudFiles sends documents for signature through DocuSign, using your own DocuSign account, so signing runs under the account and settings your company already controls. Recipients come from Salesforce fields, and when the envelope is completed the signed file returns to the record.

Controls at a glance

Control	What it does
Data-residency region	Processing in the United States, European Union, United Kingdom or Australia
Encryption	TLS 1.2+ in transit, AES-256 at rest
View and owner passwords	Protect the PDF, set per document from a Flow formula
Editing, printing, form filling	Disable editing, allow printing and form filling
Preview controls	Allow or block download and print in the preview
Retention	Deletes the generated file after a set time
Permission sets	Give users access to the generation actions in screen flows
Build, Preview, Publish	Only previewed, published templates reach users

Get started

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