

Automate Document Generation with Salesforce Flow

Five Flow actions that generate, merge and send PDF, Word, Excel and PowerPoint documents without code

CloudFiles is Document Automation for Salesforce, and its document generation is built for Salesforce Flow. This guide is for Salesforce admins and architects who want documents to appear when the business process says they should: a contract when an opportunity closes, a certificate when a course is completed, a purchase order when a record is saved. It covers each Flow action, when to use sync or async generation, how to handle completion events, batch generation and combined DocuSign envelopes, template pickers in screen flows, and two worked patterns you can build today.

How do I add document generation actions to Flow Builder?

Install CloudFiles from AgentExchange and the actions are ready in Flow Builder. Add an Action element and choose one of the five CloudFiles actions. Each one takes the record, the template and any runtime variables as inputs, and each can also be called from Apex, so you can embed document generation in Salesforce Flow and Apex with the same templates.

Flow action	What it does	Best for
Generate Document	Generates one document asynchronously; completion arrives as a document-generated event	Record-triggered and scheduled flows
Generate Document (Sync)	Returns the document, Content Version Id, name, Download URL and Preview URL in the same flow	Screen flows and chained steps
Generate Document (Batch)	Generates a collection of documents in one action, with one event per document	Bulk runs from Flow, Batch Apex, future or queueable contexts
Merge Documents (Sync)	Combines PDF, DOCX, PNG and JPEG files, in order, into one PDF	Letter plus attachments, document packs
Get Doc-Gen Templates	Lists templates by object and tags, optionally with each template's runtime variables	Template pickers in screen flows

Templates are built in Word, Excel and PowerPoint through the CloudFiles Office add-in, or as fillable PDFs in the in-app PDF editor. Word templates produce DOCX or PDF, Excel templates XLSX or PDF, PowerPoint templates PPTX or PDF, and PDF templates PDF.

Should I use Generate Document or Generate Document (Sync)?

Use **Generate Document (Sync)** when the flow needs the file straight away. A screen flow can show the Preview URL to the user on the next screen, and a later element can put the Download URL into an email alert or write it to a field. The action also returns the Content Version Id and document name, which makes it easy to chain a Merge Documents step or a DocuSign send right after it.

Use **Generate Document** when nobody is waiting on screen. A record-triggered flow calls it on an asynchronous path, the document is generated in the background, and the completion event tells the next flow what was produced. This is the right choice for stage changes, status changes and scheduled runs.

How do I handle the completion event?

When the asynchronous action finishes, CloudFiles publishes a document-generated event. Build a record-triggered or platform-event flow that listens for it. That document-generated event handler receives the details of the new file and can do whatever the process needs next: update a status field, post to the record, notify the owner, write a link onto a custom field, or send the document for signing.

Signing has its own event. When a DocuSign envelope is completed, the signed file comes back to the record or its destination, and a document-signed event lets a flow move the record to its next stage.

How does bulk document generation work for Flow and custom objects?

Generate Document (Batch) takes a collection of records and produces one document for each, in a single action. It runs from Flow, Batch Apex, future and queueable contexts, and it works on any standard or custom object. Each document raises its own event, so follow-up logic stays per record.

Batch generation can also combine the documents into one DocuSign envelope, up to 25 documents and about 25 MB. A renewal pack, an onboarding set or a group of agreements for one account goes out as a single signing request.

How do I offer a template picker in a screen flow?

Get Doc-Gen Templates returns the published templates for an object, filtered by tags with match any or match all. Put the result in a choice or data table component and the user picks one template or several from the live list. New templates appear in the picker as soon as they are published, with no change to the flow.

The action can also return each template's runtime variables. The flow then shows only the inputs the chosen template needs, such as a delivery date or a custom note, and passes them into the generation action.

What access do users need to run a screen flow?

Screen flows run as the user, so good practice is a permission set that grants access to the CloudFiles generation actions, assigned to everyone who will press the button. Record-triggered flows call the actions on an asynchronous path.

Pattern 1: How do I automate document generation for Closed-Won opportunities?

This pattern generates the customer contract the moment a deal closes and sends it for signature.

1. Build the contract as a Word template in the Office add-in, with a table of opportunity line items and DocuSign Signature and Date Signed fields. Preview it against a real opportunity and publish.
2. Create a record-triggered flow on Opportunity that runs when Stage changes to Closed Won.
3. On the asynchronous path, add **Generate Document** with the opportunity Id and the contract template, output as PDF.
4. Add a document-generated event flow that sends the PDF for DocuSign signature, with the primary contact as Signer and the account owner as Carbon Copy.
5. Add a document-signed event flow that updates a contract status field and notifies the owner.

The signed contract lands on the opportunity, or in its SharePoint, OneDrive, Google Drive, Box or Dropbox folder when CloudFiles Document Management is in use. This is how teams automate PDF document generation from Salesforce records with no manual step between the stage change and the signed file.

Pattern 2: How do I build a button that generates a document?

This pattern gives users a "Generate Documents" button on the record.

1. Create a screen flow that starts with **Get Doc-Gen Templates** for the object and a tag such as "Customer facing".
2. Show the templates as a choice list. When the chosen template has runtime variables, show a screen that asks for them.
3. Call **Generate Document (Sync)** with the record Id, the template and the variables.
4. On the final screen, show the Preview URL so the user can check the document, and save the file to the record.
5. Add the flow as a quick action on the page layout, and assign the permission set.

For several documents at once, loop over the selected templates, collect the results, and call **Merge Documents (Sync)** to hand the user one PDF.

How do I email a generated document?

There is no separate email step to set up. **Generate Document (Sync)** returns a Download URL and a Preview URL, and the flow places either one in an email alert. Recipients get a link to the document itself.

Which other triggers can start document generation?

A scheduled flow can produce monthly statements. A CloudFiles event, such as a folder being created or copied in external storage, can generate a costing sheet into the new project folder. Each generated document uses one credit, with flat pricing rather than per-document charges.

Get started

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