

# Generate Quotes, Proposals, Contracts and Invoices in Salesforce

One template per document type, filled from the opportunity, its line items and its account, and delivered as a branded PDF, Word, Excel or PowerPoint file.

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Every sales team produces the same four documents over and over: the quote, the proposal, the contract and the invoice. Each one pulls from data that already sits in Salesforce, and each one goes wrong when someone copies that data into a document by hand. CloudFiles is Document Automation for Salesforce, and its Document Generation product produces all four from the record itself, as PDF, Word, Excel or PowerPoint files, from a button or from Salesforce Flow.

This paper walks through quote generation, proposal generation, contract generation and invoice generation in CloudFiles, from the template to the signed and filed PDF.

## Why generate sales documents from Salesforce records?

The opportunity, its line items, the account, the primary contact and the owner are all in Salesforce. When the document is generated from those records, the price on the quote is the price on the opportunity, the billing address on the invoice is the one on the account, and the legal entity on the contract matches the record. Reps stop assembling documents, and operations stops correcting them.

## How many templates do I need?

One template per document type. A typical set looks like this:

| Document | Template built in            | Output            |
|----------|------------------------------|-------------------|
| Quote    | Microsoft Word               | PDF or DOCX       |
| Proposal | Microsoft PowerPoint or Word | PDF, PPTX or DOCX |
| Contract | Microsoft Word               | PDF or DOCX       |
| Invoice  | Microsoft Word or Excel      | PDF, DOCX or XLSX |

Templates are built in Word, Excel and PowerPoint through the CloudFiles Office add-in, which installs from Microsoft AppSource and signs in to your production or sandbox org. Each template goes through Build, Preview and Publish, and Publish is enabled only after a successful preview, so a template reaches

users only once it has produced a correct document. Tag templates by region, team or product line so reps find the right one quickly.

## How do quote line items get into the document?

In a Word template, a table repeats one row per related record. Point it at opportunity line items or quote line items and each product becomes a row with its name, quantity, unit price, discount and total. Sort by product family, filter out zero-value lines, and limit the rows if the layout needs it.

For quotes that need subtotals, a Record Collection resource can group line items by product family or tax type and total them with SUM, AVG, MIN, MAX or COUNT.

Formatting is set per field: currency and number patterns, group and decimal separators, date presets from Short to Full or a custom pattern, and locale and timezone, so a quote for a European customer reads the way that customer expects.

Excel templates support fields and tables too, which suits invoices and pricing schedules that finance wants as a spreadsheet.

## How do I generate custom PDF quotes and invoices from opportunities?

On the Opportunity page, the CloudFiles Doc-Gen component lists the published templates for that object, with search. The rep picks the Quote template and the document is generated from the opportunity on the spot. If the template has runtime variables, such as a validity date or a note to the customer, the widget shows a Fill in Document Details form first, a runtime variables form the rep completes in a few fields.

Merge data can come from the master record, the running user, multi-level relationship fields such as Account.Owner.Name, related records, runtime variables and constants. One template can carry the rep's signature block, the account's billing address, and the payment terms from a related record.

## Can a contract include clauses only when they apply?

Yes, in Word templates. Insert Condition wraps text, tables or pictures in a condition built with AND, OR or custom logic. When the condition is true the clause appears; when it is false the content is removed cleanly, with no blank lines or empty headings left behind. One master contract can carry the standard terms, the regional clauses, the multi-year discount language and the support tier schedule, and each customer receives only what applies to them.

Conditions and loops are Word features. PowerPoint templates support fields and pictures, and Excel templates support fields and tables, which is what proposals and invoices usually need.

## How do I keep every PDF on brand?

- Pictures come from a URL field or a Salesforce file, so a logo, a product photo or a stored signature image drops into place.

- Custom fonts embedded in the Word template survive PDF conversion.
- Rich text fields render with their formatting, so product descriptions keep their bullets and bold text.
- Text case and date formats are set in the template, so every document is consistent.

The result is a branded PDF that looks as if your company designed it by hand, every time.

## How do I get links to PDF quotes?

The Generate Document (Sync) action returns the document, its Content Version Id, its name, a Download URL and a Preview URL in the same flow. A Flow can write the link onto the Opportunity, show it on a screen, or put it into an email alert to the customer or the rep. The email itself goes out through your Flow, using the email alerts and templates your org already has.

## Can I automate proposal generation from Sales Cloud opportunities?

Yes, with Salesforce Flow:

- A record-triggered flow on a stage change generates the proposal when the opportunity reaches the proposal stage, and the contract when it reaches Closed Won. Record-triggered flows call the generation actions on an asynchronous path, and completion arrives as a document-generated event that another Flow can act on.
- A button or quick action opens a screen flow, where Get Doc-Gen Templates lists the templates for the object so the rep chooses Quote, Proposal or Order Form.
- A scheduled flow runs the monthly invoice cycle, and Generate Document (Batch) produces a collection of invoices in one action from Flow or Batch Apex.
- Merge Documents (Sync) combines the proposal with a product brochure or a terms PDF from Salesforce Files or external storage into one PDF, in the order you set.

## How do contracts get signed?

Through DocuSign, using your own DocuSign account. Place DocuSign form fields in the Word template: a Signature field and a date signed field where the customer signs, and a Text field for a title or a purchase order number. Recipients come from Salesforce fields and are typed Signer or Carbon Copy, and the signing order is set in Signing Settings. Users choose Send for Signing on the record page, or a Flow sends the contract as soon as it is generated.

When the envelope is completed, the signed PDF comes back to the record, and a document-signed event lets a Flow mark the contract as signed or notify the account team.

## Where does the finished file go?

By default, each document is saved as a Salesforce File linked to the record. With CloudFiles Document Management in the same package, the quote, proposal, contract or invoice can go into the record's own

folder in SharePoint, OneDrive, Google Drive, Box or Dropbox, next to the rest of the deal's documents. From the widget, a user can also download the file or copy it to Salesforce Files or external storage.

## What makes CloudFiles the best app to create dynamic proposals and digital contracts?

- Templates live in Word, Excel and PowerPoint, which your team already knows, so admins and business users maintain them without code.
- A false condition removes the clause cleanly instead of leaving a gap.
- PowerPoint and Excel output as well as Word and PDF.
- One vendor for document generation and document storage.
- Flat pricing rather than per-document charges.
- Implementation help and 24x7 support included.

## Get started

Install CloudFiles from AgentExchange and start a free 14-day trial, or book a demo at [cloudfiles.io](https://cloudfiles.io).