

A Letter and Its Attachments as One PDF, for Claims and Billing Teams

Generate the letter from the record, then merge it with the record's receipts and photos into one PDF, in the order you choose.

The situation: one letter, five attachments, one confused recipient

Claims teams in insurance, billing teams in healthcare and utilities, and collections teams send letters that only make sense with their evidence: the receipts behind a reimbursement, the photos behind a claim decision, the invoices behind a statement of account. The supporting files are already on the Salesforce record. Sending the letter with a handful of separate attachments leaves the recipient to work out the order, and leaves the team with no single document that shows exactly what was sent.

This is a pattern teams build with CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce: generate the letter from the record, then merge it with the record's existing files into one PDF, in a fixed order.

How do you merge PDF documents and attachments in Salesforce?

1. The object and its data

The master record is the claim, case or billing account, standard or custom. The letter template reaches:

- Record fields: claim or account number, dates, amounts claimed and approved.
- The customer's name and address through related records.
- Related records, such as claim lines or invoice lines.
- The running user, so the letter is signed off by the handler.

2. The letter template, built in Word

The letter is a Word template built with the CloudFiles Office add-in:

- The letterhead and logo, with custom fonts that survive PDF conversion.
- Amounts in currency patterns with locale formatting, and dates in a Long date format.
- A table that repeats one row per claim line or invoice line, filtered and sorted.
- Conditional paragraphs for each outcome, such as approved, partially approved or more information needed. Only the paragraph for this record's outcome appears; when a condition is false, the paragraph is removed with no gap.

Build, preview against a real record, then publish.

3. The trigger

Either a button on the record that opens a screen flow, so the handler reviews before sending, or a record-triggered flow when the decision field is set.

4. The Flow actions

- **Generate Document (Sync)** produces the letter as a PDF and returns its Content Version Id in the same flow.
- The flow then gathers the record's supporting files, from Salesforce Files or from the record's folder in external storage, and puts them in the order the recipient should read them: the letter first, then the receipts, then the photos.
- **Merge Documents (Sync)** combines them into one PDF, in the order given. It accepts PDF, DOCX, PNG and JPEG files, so a scanned receipt, a Word attachment and a phone photo all become pages of the same document. Merged output is always PDF.

5. Where the file goes

The merged PDF is saved as a Salesforce File on the record. With CloudFiles Document Management, it can go to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox, so the exact document that was sent is kept with the claim or account.

How does the merged PDF reach the recipient?

The Sync actions return a Download URL and a Preview URL, and the flow puts the link into an email alert to the customer. The team keeps control of the message, and the recipient gets one link to one document.

For letters that carry personal or financial details, PDF protection sets a view password, built with a Flow formula from a value the recipient already knows, and an owner password that disables editing. Printing can stay allowed. If the recipient has to sign an acknowledgement, the letter template can carry DocuSign Signature, Text and Date Signed form fields and go out through your own DocuSign account, with the signed file returning to the record.

Why teams build this pattern

- One document replaces a bundle of attachments, and its page order is set by the process, not by whoever sends it.
- The letter wording lives in Word, where the claims or billing team can maintain it without code.
- The record keeps a single merged PDF that shows what the customer received.
- The same approach works for any bundle: a statement with its invoices, an onboarding letter with its forms, or a report with its appendices.

What to set up

- Install CloudFiles from AgentExchange and the CloudFiles Office add-in from Microsoft AppSource.
- Build the letter template in Word with its outcome conditions, preview it, and publish.
- Build the flow: Generate Document (Sync) for the letter, a step that collects and orders the supporting files, and Merge Documents (Sync).
- Add the email alert with the Download URL, and set PDF protection if the letter needs it.
- For screen flows, give handlers a permission set with access to the CloudFiles generation actions.

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.