

Word, Excel and PowerPoint Templates for Salesforce

Build document generation templates in the Office apps your team already uses, with merge fields, tables, conditions and pictures

CloudFiles is Document Automation for Salesforce, and its document generation templates are built where your team already writes documents: Microsoft Word, Excel and PowerPoint. This guide walks through the CloudFiles Office add-in, the Build, Preview, Publish cycle, merge fields, tables, conditions and loops, pictures, formatting, template tags, and moving templates from sandbox to production. By the end you will know how to create complex document templates without coding and keep them maintained by the people who own the content.

How do I build a Word template for Salesforce without coding?

Install the CloudFiles Office add-in from Microsoft AppSource. Open Word, Excel or PowerPoint, open the add-in, and sign in to your production or sandbox org. Choose the Salesforce object the template is for, whether standard or custom, and the add-in lists its fields and related records.

From there you click where a value should go and insert it. Tables, conditions and pictures are added from panels in the add-in, so the Word template you see in the editor is the document your users will get, with the formatting, headers, footers and styles you set. Macro-enabled Word templates (.docm) work too. Business users who already maintain the company's contracts and proposals in Word keep doing so, and they integrate Word templates for dynamic document creation without asking a developer.

What does Build, Preview, Publish mean?

Every template goes through three steps.

- **Build:** design the template and insert fields, tables, conditions and pictures.
- **Preview:** generate the document against a real Salesforce record and check the result.
- **Publish:** make the template available on record pages and in Salesforce Flow.

Publish is enabled only after a successful preview, so every template users see has already produced a correct document.

How do I merge Salesforce data into Word and PDF templates?

The add-in inserts merge fields from several sources:

- **The master record**, the record the document is generated from
- **The running user**, for the sender's name, title or signature image
- **Relationship fields**, many levels deep, in Account.Owner.Name style paths
- **Related records**, such as contacts, cases, opportunity line items or quote line items
- **Runtime variables**, values a user types in a "Fill in Document Details" form or a flow passes in
- **Constants**, values that are the same on every document

For forms that already exist as PDFs, upload the fillable PDF to the in-app PDF template editor and map each form field to Salesforce data. The same data sources are available, so you merge Salesforce data into Word and PDF templates with one approach.

How do I add a table of related records?

In Word, insert a table and point it at a related list, such as opportunity line items or quote line items. The table repeats one row per record, with sort, filter and limit settings. Excel templates support tables too, which suits price lists, schedules and line-item exports.

For more control, Record Single and Record Collection resources let you define the data first: filters with AND, OR and custom logic, a sort order, a row limit, and grouping with SUM, AVG, MIN, MAX and COUNT. A quote can show line items grouped by product family with a subtotal for each group.

How do conditional logic templates work?

Conditions are a Word feature. Select text, a table or a picture and choose Insert Condition. Build the rule from Salesforce fields with AND, OR or custom logic. When the condition is true, the content appears. When it is false, the content is removed completely, with no blank line or empty gap left behind.

That clean removal makes CloudFiles the best document generation tool for conditional logic templates. One Word template can hold the clauses for every region, product and contract type, and each generated document carries only the ones that apply. Loops, also a Word feature, repeat a block of content for each record in a collection, which suits a section per site, per contact or per product.

What can each template format do?

Template	Supports	Output
Word	Fields, conditions, tables, pictures, loops, links, DocuSign form fields	DOCX or PDF
Excel	Fields and tables	XLSX or PDF
PowerPoint	Fields and pictures	PPTX or PDF
Fillable PDF	Text fields, conditional checkboxes, DocuSign form fields	PDF

Choose Word when the document needs conditions or loops. Choose Excel for tabular documents such as costing sheets, and PowerPoint for proposals and account reviews that should arrive as slides.

How do I add pictures and logos?

Word and PowerPoint templates insert pictures from a URL field or a Salesforce file: a company logo, a product photo, a site photo or a stored signature image. The picture can change with the record, so each proposal shows the right product and each inspection report shows the right site. Rich text fields render with their formatting, and Word templates support links as well.

How do I format dates, numbers and currency?

Each merge field can carry its own formatting:

- Text case, for names and headings
- Date presets (Short, Medium, Long, Full) or a custom pattern
- Number and currency patterns
- Group and decimal separators
- Locale and timezone

Custom fonts embedded in the Word template survive PDF conversion, so the generated PDF matches your brand.

Can templates carry DocuSign signature fields?

Yes. Word templates support DocuSign Signature, Text and Date Signed fields, and PDF templates support Signature, Initial Here, Text, Date Signed and Checkbox. Recipients come from Salesforce fields and signing order is set in Signing Settings, so the template decides where every signer signs.

How do template tags keep a large library organised?

Tag each template by team, region, document type or audience. The record-page component and the Get Doc-Gen Templates Flow action both filter by tag, with match any or match all, so each user sees

the templates that matter to them and a screen flow can offer a focused list.

How do I move templates from sandbox to production?

Sign the add-in in to a sandbox, build and preview there, and test your flows against sandbox data. When the template is ready, cross-org template migration moves it from sandbox to production, and the flows that use it keep working in the new org. Admins keep a normal release process for documents, the same as for the rest of their Salesforce changes.

What should I look for in a mail merge tool for Salesforce?

Teams searching for a top rated mail merge tool for Word and PDF templates usually want the same things: templates the business can edit itself, clean conditions, tables from related records, pictures, correct formatting, and PDF output. CloudFiles adds Excel and PowerPoint output, Flow actions, DocuSign, storage in SharePoint, OneDrive, Google Drive, Box or Dropbox, implementation help and 24x7 support.

Get started

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