

Intelligent Document Processing for Salesforce

How CloudFiles Document AI runs the whole document process inside Salesforce and Flow

What is intelligent document processing in Salesforce?

CloudFiles is Document Automation for Salesforce, and CloudFiles Document AI is the part of it that runs document processes. Intelligent document processing (IDP) is the work of taking a document that arrives in your business, understanding what it is and what it says, and making the right thing happen next.

Most teams still run this process by hand. Documents arrive by email, fax, portal upload or scan. Someone opens each one, works out what it is, re-keys the values into Salesforce and files the document. Template-based OCR tools promised to fix this and then broke the first time a vendor moved a field on the page. Bundles still get split by hand, and some teams still put a separator sheet in front of every packet.

Document AI replaces that manual work with AI document processing that lives inside Salesforce. It reads, classifies, splits and understands unstructured documents, then drives what happens next through Salesforce Flow, Salesforce records and the permissions you already have.

What does an IDP process actually do, step by step?

A document process in Document AI follows the path a document takes through your business:

- **Arrive.** A file is attached to a record, uploaded through a screen Flow, delivered by Email-to-Case, or dropped into a connected folder.
- **Read.** Native PDF text is read directly. Scanned and mixed pages are sent to OCR.
- **Classify.** The document is identified by type: an invoice, a transcript, an audit report, an application form, a board pack.
- **Split.** A multi-document PDF bundle is split into one file per document, each named from its content.
- **Extract.** Fields and lists of items, such as invoice line items, are taken from the document using plain-language descriptions of what you want.
- **Match.** Values are matched against existing records, such as the account, company, contact or vendor, and missing records can be created.
- **Write.** Records and child records are created or updated in Salesforce through standard DML.

- **Review.** Runs that need a person's sign-off are held for review before anything is written.
- **Record.** Each run is recorded in Salesforce as a CloudFiles DocAI Run record.

Extraction is one step in that chain. Intelligent document processing joins every step into one process that runs on its own and stops only where your team wants to look.

How do you run Document AI in Salesforce?

Document AI runs as Salesforce Flow actions, and the same invocable actions can be called from Apex. There are five ways to run it:

Flow action	What it does
CloudFiles: Process Document using AI	Reads a PDF, JPEG, PNG, CSV, TXT or JSON file and returns its content to the Flow
CloudFiles: Query Document/Dataset	Asks a document or a dataset a question in plain language and returns a structured answer to the Flow, with a batch version
CloudFiles: Split Document using AI	Splits a multi-document PDF bundle into one file per document, names each file from its content and saves the pieces as Salesforce Files
CloudFiles: Document Mapper	Runs a saved mapper configuration that creates or updates a Salesforce record plus its child records
CloudFiles: Run Doc AI Workflow	Runs a Doc AI Workflow built on a visual canvas

CloudFiles: Create Dataset combines files and SOQL sources, refreshed every 24 hours, 48 hours or weekly, so the query action can answer across many documents and records. Results come back as CloudFiles events, read with CloudFiles: Get Event Details. A Super Admin can try prompts on a real document in the AI Playground before building.

When is Document Mapper the right choice?

Document Mapper suits document processing where one document becomes one record and its children: an invoice and its line items, or an application and its services. You describe each field in plain language, with no layout templates. Lookups are resolved per field by Get Existing, Create New or Call Flow Action. Mapper runs from Flow and from List View and Detail Page buttons, document sets let one run read several files, and it reads images as well as PDFs.

When is a Doc AI Workflow the right choice?

A Doc AI Workflow suits processes with branches. On a visual canvas you combine Classify, Extract fields, Ask the document, find or search records, create, update, delete, Create Salesforce records (bulk), run a Salesforce Flow, Decision and For each. Record matching can be strict, fuzzy or AI-picked. A blank value never wipes a field. The start card checks every object and field the workflow references, and

published workflow versions are frozen, so a live process does not change under you. Workflows accept PDFs and Office documents.

Where do the documents come from?

Unstructured documents reach Salesforce in many ways. Record-triggered Flows run on an asynchronous path. CloudFiles events fire when a Salesforce file is attached or a file is uploaded. Screen Flows let a user upload and process in one step. Mapper buttons start a run from a list view or a record page, and a workflow has its own launch form. Email-to-Case attachments are a common entry point.

Documents live in Salesforce Files, and with CloudFiles Document Management also in SharePoint, OneDrive, Google Drive, AWS S3, Azure Blob, Box and Dropbox. A file dropped into a connected folder can trigger processing, and classified documents can be moved into the right folder with Document Management's Move Resource action. Document Generation can create documents from the extracted data in the same process.

Why should document processing be native to Salesforce and Flow?

When IDP runs outside Salesforce, every result has to be carried back in, mapped again and secured again. Document AI is part of one managed package, it runs as Flow actions your admins already know, and it writes through standard Salesforce DML, so validation rules and field-level security apply to every write.

That also changes who owns the process. A Salesforce admin can build, test and change a document process in Flow Builder and on the workflow canvas, replacing template-based OCR tools, a MuleSoft IDP project or a custom build.

Can we review results before anything is written?

Yes. In Document Mapper, the setting for when automation runs finish is either Auto approve or the review queue. Held runs show Pending Review, and a reviewer can edit cells, add rows, then choose "Approve & Write to Salesforce" or Reject. A lookup with no match, or with several matches, forces review.

In a Doc AI Workflow, the review policy is one of three: Straight through, a hold on the first write, or Approve every write. A single step can also be set to need approval for its own write, and the run shows "Awaiting review" until someone acts. Review queues and approval settings decide what is written without a person's sign-off.

How is each run recorded?

Each run is recorded in Salesforce as a CloudFiles DocAI Run record, with its status: Processing, Completed, Pending Review, Failed or Rejected. Reprocessing creates a new run and keeps the old one. Workflows keep a step-by-step history of every run, and every pause, approval and rejection is recorded.

Document AI uses large language models and OCR, and CloudFiles does not train or fine-tune AI models on your documents.

What does intelligent document processing look like in practice?

A pattern we see in private equity: an offering memorandum arrives by email and Email-to-Case creates a Case. A Doc AI Workflow extracts the deal fields and matches the company, contacts and source to existing records, creating any that do not exist. The sender gets the extracted fields by email and replies to confirm or correct, and only then is the Deal created and the document filed into the deal's SharePoint folder by Document Management.

For example, a scholarship nonprofit can attach a transcript to a scholar's document record. When the status is set to Submitted, a workflow checks institution, student name, term, units and a program rule against the record, and the result is Approved, Rejected, or Manual Review Pending with a named reason.

Get started

Install CloudFiles Document AI from AgentExchange and start a free 14-day trial or a Test Drive, or book a demo at cloudfiles.io. A free sandbox proof of concept on your own documents is also offered, with implementation and 24x7 support included.