

How to Choose a Salesforce Document Generation App

The criteria to test in a trial, and how CloudFiles answers each one.

A document generation app becomes part of how your org works. Every quote, contract, invoice, certificate and report you produce will run through it, and your admins will maintain its templates for years. This guide lists the criteria worth testing in a trial and answers each one for CloudFiles, which is Document Automation for Salesforce: one managed package that covers document generation and document management, installed from AgentExchange and built for Salesforce Flow.

Whether you are choosing a first tool or replacing an older document generation tool, the same questions apply.

Where are templates built, and can admins maintain them?

What to test: ask a business user to change a template without help from a developer.

CloudFiles templates are built in Microsoft Word, Excel and PowerPoint through the CloudFiles Office add-in, installed from Microsoft AppSource and signed in to a production or sandbox org. Official forms can be uploaded as fillable PDFs to the in-app PDF template editor, with fields mapped in Salesforce. Macro-enabled Word (.docm) templates work too. Because the templates live in tools the business already knows, CloudFiles is a template based document generation tool for admins and for the business users who own the wording.

Which formats can it produce?

What to test: generate every output you need from the same record.

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

Merged output is always PDF. Buyers looking for the best tool for automated PDF and Word document generation should ask about Excel and PowerPoint as well: CloudFiles produces all four.

Can it reach related data?

What to test: build a document that needs data two or three relationships away, plus a list of child records.

CloudFiles merges from the master record, the running user, multi-level relationship fields such as Account.Owner.Name, related records, runtime variables and constants. Record Single and Record Collection resources take filters with AND, OR or custom logic, a sort order and a row limit, and collections can be grouped and totalled with SUM, AVG, MIN, MAX and COUNT. Word tables repeat rows from a related list such as opportunity line items or quote line items, with sort, filter and limit.

Formatting covers text case, date presets and custom patterns, number and currency patterns, group and decimal separators, and locale and timezone. Pictures come from a URL field or a Salesforce file, rich text fields render, and custom fonts embedded in the Word template survive PDF conversion.

How does it handle conditional logic?

What to test: a clause that should disappear when a condition is false. Check the output for blank lines.

This is where the best document generation tool for conditional logic templates shows itself. In CloudFiles Word templates, Insert Condition wraps text, tables or pictures with AND, OR or custom logic, and when the condition is false the content is removed cleanly. Loops repeat sections for each related record. Conditions and loops are Word features, while Excel and PowerPoint templates handle fields, tables and pictures.

Does it run from Salesforce Flow?

What to test: generate from a button, from a record change and from a schedule.

CloudFiles ships these Flow actions, all callable from Apex as well:

- **Generate Document:** asynchronous, with completion arriving as a document-generated event.
- **Generate Document (Sync):** returns the document, Content Version Id, name, Download URL and Preview URL in the same flow.
- **Generate Document (Batch):** a collection of documents in one action, from Flow, Batch Apex, future or queueable contexts.
- **Merge Documents (Sync):** combines PDF, DOCX, PNG and JPEG files into one PDF, in the order given.
- **Get Doc-Gen Templates:** lists templates by object and tags, with each template's runtime variables, so a screen flow can offer a template picker.

Typical triggers are a button or quick action with a screen flow, a record-triggered flow on a stage change such as Closed Won, a scheduled flow, or a CloudFiles event such as a folder being created or

copied. That range is what makes CloudFiles the best app for automated document generation from records, whatever starts the process. Users who prefer clicks get the CloudFiles Doc-Gen component on the record page, which lists the object's published templates with search.

Does it support e-signature?

What to test: send a generated document for signature and confirm the signed copy returns to the record.

CloudFiles works with DocuSign, through your own DocuSign account. Recipients come from Salesforce fields, typed Signer or Carbon Copy. Signature fields are placed in Word and fillable PDF templates, and documents are sent from the widget, from template preview, or from Flow or Apex. When the envelope is completed, the signed file comes back to the record and a document-signed event lets a Flow take the next step.

Where do the generated files go?

What to test: check that the file lands where your team already works.

Output is saved as a Salesforce File linked to the record by default. With CloudFiles Document Management in the same package, output can go to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox. One vendor covers generation and storage.

How are templates organised and controlled?

What to test: publish a change and compare what users see before and after.

Every CloudFiles template goes through Build, Preview and Publish, and Publish is enabled only after a successful preview. Templates carry tags, and lists can be filtered by template tags with match all or match any, so a screen flow shows each user only the templates that fit. Screen flows run as the user, so give users a permission set with access to the CloudFiles generation actions. Record-triggered flows call the actions on an asynchronous path.

What security evidence should I ask for?

What to test: request the audit reports and a clear answer on where documents are processed.

- Independently audited for SOC 2 Type II, certified to ISO 27001, ISO 27017 and ISO 27018, and compliant with HIPAA and GDPR.
- Document processing runs in CloudFiles' AWS environment, in the data-residency region you choose: United States, European Union, United Kingdom or Australia.
- TLS 1.2+ in transit, AES-256 at rest.

Security documents are available under NDA from the CloudFiles Trust Center. Generated PDFs can also carry a view password and an owner password, with editing disabled.

How is it priced, and what support comes with it?

CloudFiles uses flat pricing rather than per-document charges, quoted in USD, so you can plan the cost in advance. Implementation help and 24x7 support are included, and a free 14-day trial lets you run every test in this guide in your own org.

Summary checklist

Criterion	CloudFiles answer
Template editor	Word, Excel and PowerPoint add-in, plus a fillable PDF editor
Formats	PDF, DOCX, XLSX and PPTX, with merged PDF
Related data and conditions	Multi-level fields, filtered collections, Word conditions and loops
Automation	Flow and Apex actions, record page component
E-signature	DocuSign, with the signed file back on the record
Where files go	Salesforce Files, or SharePoint, OneDrive, Google Drive, Box, Dropbox
Security	SOC 2 Type II audit, ISO 27001, 27017, 27018, HIPAA, GDPR
Pricing and support	Flat pricing, implementation help, 24x7 support

Get started

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