

Salesforce PDF Generation and PDF Merge

Generate PDF documents from Word, Excel, PowerPoint and fillable PDF templates, then merge, protect and send them from Salesforce

CloudFiles is Document Automation for Salesforce. Its document generation produces PDF documents from any Salesforce record, from templates built in Word, Excel and PowerPoint or from fillable PDF forms, and its Merge Documents action combines several files into one PDF. This data sheet covers PDF generation from every template format, fillable PDF templates, PDF merge, action buttons, password protection, retention, storage and DocuSign signing.

How do I generate a PDF from Salesforce?

Pick a template, pick a record, and generate. Every CloudFiles template format can produce a PDF:

Template built in	Editable file output	PDF output
Microsoft Word	DOCX	Yes
Microsoft Excel	XLSX	Yes
Microsoft PowerPoint	PPTX	Yes
Fillable PDF	PDF only	Yes
Merge Documents	PDF only	Always PDF

Users generate a PDF from the CloudFiles Doc-Gen component on the record page, which lists the object's published templates with search. Salesforce Flow and Apex generate PDFs automatically, with the Generate Document, Generate Document (Sync) and Generate Document (Batch) actions. PDF generation works on any standard or custom object, and each generated document uses one credit.

How does Word to PDF conversion work?

Build the template in Word through the CloudFiles Office add-in, and choose PDF as the output. The Word template keeps its conditions, tables of related records, pictures, loops and links, and the generated PDF carries the result. Custom fonts embedded in the Word template survive PDF conversion, rich text fields render, and date, number and currency formatting follow the locale and timezone you set. Word to PDF is the most common route for contracts, proposals, letters and certificates, because the business already writes those documents in Word.

Excel to PDF and PowerPoint to PDF work the same way: a costing sheet or a slide proposal is generated with Salesforce data and delivered as a PDF.

How do I create custom PDF templates with Salesforce merge fields?

When the document already exists as a PDF form, use it as the template. Upload the fillable PDF to the in-app PDF template editor and map each form field to Salesforce data: the master record, the running user, relationship fields in Account.Owner.Name style paths, related records, runtime variables and constants. The original layout stays exactly as it is.

PDF templates support text fields, checkbox by condition, and DocuSign form fields. A checkbox is ticked when its Salesforce condition is true and left clear when it is false, which is how a government or court form reflects the choices held on the record. The DocuSign form fields available in PDF templates are Signature, Initial Here, Text, Date Signed and Checkbox.

This is how teams create custom PDF templates with Salesforce merge fields for W-9 style forms, court and state forms, applications and registrations, with no redrawing of the form.

How do I generate and combine multiple PDF documents automatically?

Merge Documents (Sync) combines PDF, DOCX, PNG and JPEG files into one PDF, in the order you give. The files can come from Salesforce Files or from external storage. A common pattern teams build:

1. Generate the letter with **Generate Document (Sync)**.
2. Collect the record's existing files, such as receipts or photos.
3. Call **Merge Documents (Sync)** with the letter first and the attachments after it.
4. Save the single PDF to the record, or send it for signing.

A screen flow can also let a user pick several templates from the live list returned by **Get Doc-Gen Templates**, generate each one, and merge them into one PDF. That is how Salesforce teams generate and combine multiple PDF documents automatically, whether for a claims letter with its evidence or an onboarding pack.

For signing, **Generate Document (Batch)** can combine up to 25 documents, about 25 MB, into one DocuSign envelope.

How do I add action buttons for automated PDF generation?

Build a screen flow around **Generate Document (Sync)** and add it to the page layout as a quick action. The user presses the button, answers any runtime variables the template needs, and gets the PDF with a Preview URL on the final screen. The file is saved to the record at the same time.

Teams add action buttons for automated PDF generation such as "Print Documents", "Generate Quote PDF" or "Create Certificate". Because screen flows run as the user, assign a permission set with access to the CloudFiles generation actions to everyone who will use the button.

For PDF generation with no button at all, a record-triggered flow on a stage or status change calls **Generate Document** on the asynchronous path, and a document-generated event flow handles what comes next.

Can I password-protect a generated PDF?

Yes. Each generated PDF can carry these protection settings:

- **View password**, required to open the file
- **Owner (editor) password**, for editing rights
- **Disable editing**
- **Allow printing** and **allow form filling**
- **Control download and print** in the preview

Both passwords can be set from a Flow formula, so each recipient's PDF can use a value from their own record.

How long are generated PDFs kept?

Set a retention period in minutes and CloudFiles deletes the file after that time. Retention suits documents that should be viewed or downloaded once, such as a statement link sent by email, and should not stay on the record.

Where are generated PDFs saved?

By default each PDF is saved as a Salesforce File linked to the record. With CloudFiles Document Management in the same package, the PDF can go to the record's own folder in SharePoint, OneDrive, Google Drive, Box or Dropbox. From the record-page component a user can download the PDF, copy it to Salesforce Files, copy it to external storage, or send it for signing.

There is no separate email step to configure. The Sync action returns a Download URL and a Preview URL, and a flow puts either one into an email alert.

Can a generated PDF be sent for DocuSign signature?

Yes, through your own DocuSign account, connected under Document Generation, Integrations. Recipients come from Salesforce fields as Signer or Carbon Copy, and signing order and envelope Brand ID are set in Signing Settings. Send from the record page, from template preview, or from Flow or Apex. When the envelope is completed, the signed PDF returns to the record or its folder, and a document-signed event lets a flow update the record.

Why do teams choose CloudFiles for PDF generation?

Templates stay in Word, Excel, PowerPoint and PDF, which the business already knows. A false condition removes content cleanly. One vendor handles PDF generation, PDF merge and document storage, with flat pricing rather than per-document charges, 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.

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