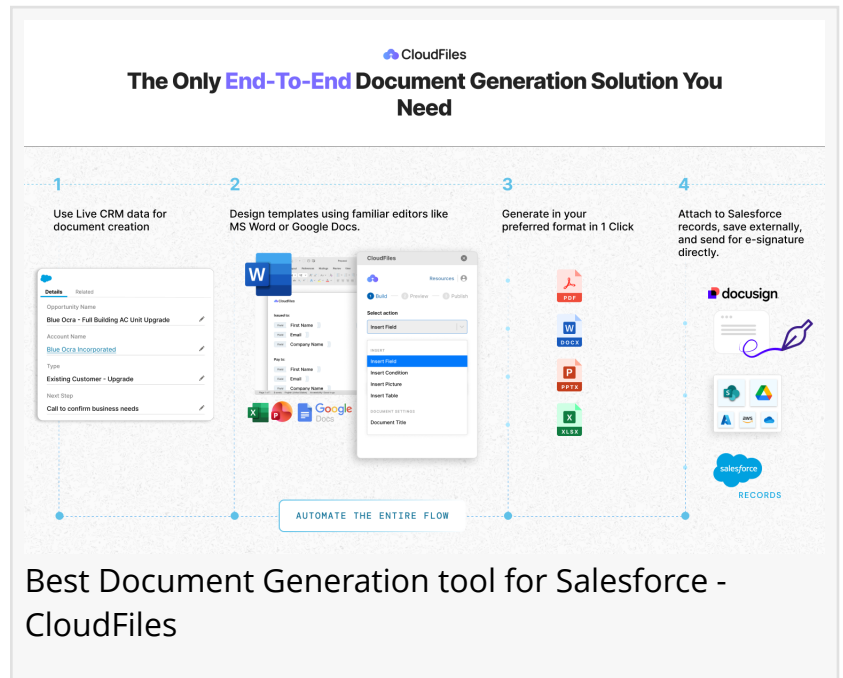


CloudFiles Helps Enterprise Salesforce Teams Generate Complex Documents with Up to 50% Less Manual Effort

CloudFiles helps Salesforce teams create complex documents from CRM data with MS Office tools, no heavy setup, cutting delivery by 40% & going live in 2 weeks!

FREMONT, CA, UNITED STATES, July 7, 2026 /EINPresswire.com/ -- CloudFiles Document Generation is a Salesforce-native application that creates business documents from Salesforce records using Microsoft Office templates, with output to Word, Excel, PowerPoint, and PDF. It is available on Salesforce AppExchange (AgentExchange) as part of the broader CloudFiles document suite, alongside [CloudFiles Document Management](#) and [CloudFiles Document AI](#).



Check out [CloudFiles Document Generation Solution for Salesforce on AppExchange](#)

(AgentExchange) -

<https://appexchange.salesforce.com/appxListingDetail?listId=de62e2e1-191d-4aa2-a73e-237b426b4675>

“

Salesforce teams don't need another template tool. They need connected document workflows. CloudFiles brings generation, e-signature, storage, AI processing, & record visibility into one easy platform”

Vishesh Singhal, Co-Founder and CEO of CloudFiles

The problem: most Salesforce document tools solve only half of it

Salesforce teams have many document generation options, but most tools solve only one part of the problem. Some are built for basic template merging. Some require users to rebuild templates in separate editors. Some turn into heavy implementation projects. Others stop once the document is created, leaving teams to manage storage,

sharing, eSignature, AI processing, and downstream automation through separate systems. CloudFiles is built for the middle ground Salesforce teams often need: lightweight enough for enterprise users, flexible enough for complex documents, and connected enough to support the full document lifecycle.

How CloudFiles Document Generation works

With CloudFiles Document Generation, teams can create templates in the Microsoft Office tools they already use, merge live Salesforce data, generate documents in Word, Excel, PowerPoint, or PDF formats, trigger generation through Salesforce Flow, and store outputs in Salesforce Files or external storage systems such as SharePoint, OneDrive, Google Drive, Dropbox, Box, AWS S3, and Azure Blob.

That matters most for document-heavy teams in sales, service, operations, field service, financial services, insurance, real estate, and healthcare, where documents are rarely simple one-page PDFs. They often include related Salesforce records, dynamic tables, images, runtime inputs, compliance fields, customer data, approval steps, and storage rules.

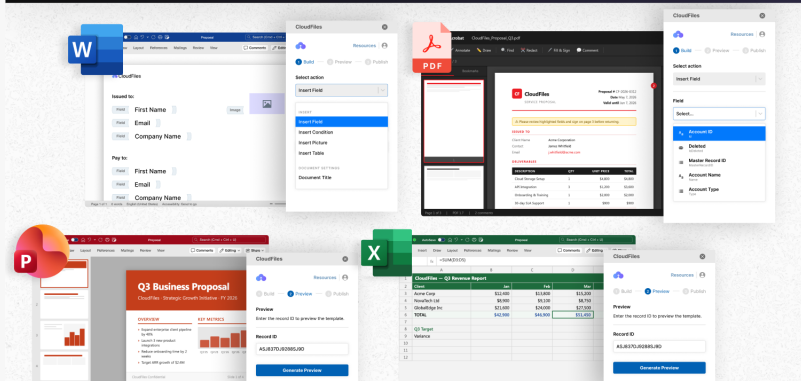
A global automotive manufacturer cut project delivery time by 40%. The company used CloudFiles Document Generation and Document Management to automate project documentation across Salesforce and SharePoint, with automated folder structuring, dynamic Word templates, screen-flow personalization, and read-only access controls.

The results?

- 40% faster project completion, from five days to three days per project
- 50% reduction in document management effort, from one hour to 30 minutes per project
- 60% improvement in compliance & security, with documents needing manual correction falling

Design Templates In Tools You Already Use

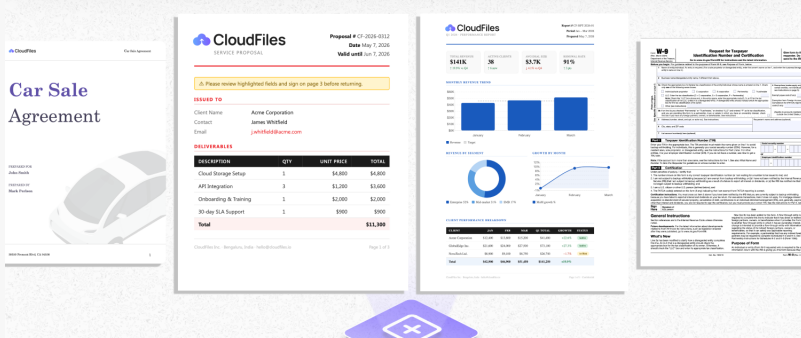
Create document templates in Microsoft Word, Excel, PowerPoint and PDF builder. Use Office Add-Ins to insert live Salesforce data directly into templates without changing tools or layouts.



Design templates for Salesforce tools you already use

Create Documents That Drive Business

Generate Agreements, Invoices, Reports And Forms Directly From Salesforce. Automate Complex Document Workflows And Eliminate Manual Document Creation At Scale.



Create Documents for all businesses in Salesforce

from roughly 20% to 8%

- Live in 2 weeks, with more than 15,000 existing documents migrated in 72 hours
- 100% team adoption after a single 90-minute training session

The same flexibility applies across industries. A field service team can generate site visit reports that combine record data, checklist responses, observations, images, and customer-ready formatting in one automated document, a structure CloudFiles has supported with more than 20 runtime questions, data from 4 Salesforce objects, 6 content types, and up to 4 images per page. A financial services team can produce onboarding packs, KYC summaries, policy documents, loan processing files, investment proposals, and compliance reports from Salesforce data and uploaded customer documents.

CloudFiles is trusted by 1,200+ Salesforce teams managing millions of documents and has crossed 250+ five-star reviews for its Salesforce document management and SharePoint integration solution. Customers use CloudFiles across financial services, healthcare, real estate, technology, professional services, field operations, and other document-heavy industries.

"Salesforce teams are asking for fewer tools, not more tools," added Singhal. "They want document generation, document management, and document intelligence to work together inside Salesforce. That is where CloudFiles stands apart. We are not just helping teams generate a file. We are helping them automate what happens before and after that file is created."

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