CloudFiles

Dreamforce
2026

The *easiest* AI win in your org: automate documents in Salesforce

Document automation for Salesforce

Vishesh Singhal
CEO, CloudFiles

SESSION 2894 · THURSDAY 1:00 PM PT · BOOTH 536

Every AI roadmap starts with the *hardest* thing

CloudFiles

WHERE ROADMAPS START

Agents making judgment calls

Months of design, review and trust building before the first useful outcome reaches anyone.

WHERE THE WIN ALREADY SITS

Documents

Deterministic work, sitting in every org, every morning. No judgment to trust: the field was read or it was not.

Start with the deterministic one.

Meet Megan

CloudFiles

She is the reason this talk is about documents and not about models.

Megan Walsh
Claims intake examiner

Bluewater Mutual
PROPERTY & CASUALTY INSURANCE

She works at Bluewater Mutual, a fictional regional property and casualty insurer. Every claim reaches her the same way: a broker email with multiple files attached.

Her job is to turn that email into a record the adjuster, the appraiser and the contractor can all work from.

40 new claims land in her inbox every morning

10 attachments on the email for a single claim

10 all in a different format, because every broker sends its own form

Her morning, one claim, end to end

CloudFiles

The way it is done today, on a claim where nothing goes wrong.

Step	Minutes
Open the email and its ten attachments, read them	8
Retype the fields into the Case and the claim summary	10
Find and check the policy, link it to the claim	4
Maintain a checklist of documents	5
Write the acknowledgment letter from last week's letter	8
Rename and file ten documents on the shared drive (SharePoint)	10
Email the appraiser a copy of everything	5

50

minutes a claim.

Forty claims is more than a day.

None of it is a decision.

Four things make it *slow*

CloudFiles

Fix one of these and the morning barely moves. They have to go together.

Reading the documents is hard

Ten attachments, two of them handwritten, and a different first notice of loss form from every broker.

The letters are built by hand

Last week's acknowledgment letter, opened, saved under a new name and retyped for this claim.

The files never leave the org

The appraiser and the contractor work outside it and have no way to reach the intake file.

The claim lives in three places

Part of it is in the inbox, part on the shared drive, part on the Case. No one place is the claim.

One record. *Three* moves.

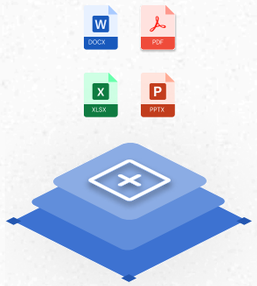
CloudFiles

All three configured in Salesforce. Nothing here is a build project.

AI

Extract

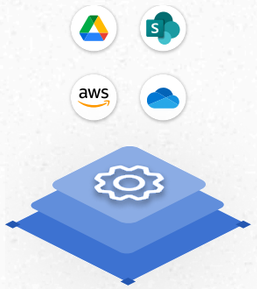
The broker's email and its ten attachments become a claim summary and the fields on the Case. Megan reviews and confirms.



Not AI

Generate

The acknowledgment letter and the adjuster assignment summary come from those fields, in one click.



Not AI

File

Every document lands in SharePoint sorted by type, and the outside appraiser gets the folder without a license.

Two of the three moves are not AI. AI closed the one step that never had a way.

CloudFiles

Let’s see a demo

The same morning, after

CloudFiles

Same claim, same ten attachments, same broker email.

Fields are reviewed, not retyped

Megan reads the proposed values beside the claim summary and confirms them.

Ten documents file themselves

Sorted into their typed subfolders within a minute of the email arriving.

The appraiser has the evidence

They open the folder they are entitled to, and nothing else, without a Salesforce or a SharePoint license.

The policy period question is a filter

Date of loss outside the policy period is now a report, not a reading exercise.

50 minutes

of typing and filing

3 minutes

of review

What it is worth

CloudFiles

Megan's numbers, as an illustration. Yours come from your own queue.

Time saved

50 minutes a claim becomes 3. Forty claims a day gives the intake team back a full working day, every day.

Speed

The adjuster has the claim in minutes, not the afternoon. The acknowledgment goes out the same hour it arrived.

Accuracy

Fields are reviewed, not retyped. No transposed policy number, no letter carrying last week's claimant.

Compliance

Every document filed, named and tagged, retention on SharePoint's rules, a record of who saw what.

Reach without seats

The appraiser and the contractor work from the folder they are entitled to. No Salesforce license, no email chains.

Capacity

Storm season is more claims, not more hires. The same team absorbs the peak.

Claims is *one* example

CloudFiles

The same three moves run on any work where documents arrive and a record has to catch up.

- Vendor invoices and payment packets
- Candidate credentialing in staffing
- Deal intake from investment memos
- Grant and scholarship applications
- Supplier audit certificates
- Loan document checklists
- Legal matter intake

Different documents, same three moves.

Pick the queue with the most attachments and the least judgment.

Bring your use case to us

CloudFiles

Booth 536

Thank you

Document automation for Salesforce

Vishesh Singhal, CEO, CloudFiles

Book a meeting

meet.cloudfiles.io/salesforce

cloudfiles.io