# **Document AI Resource Repository**

## **📋 Quick Navigation Guide**

**Document AI** enables intelligent processing of unstructured documents using AI to extract and structure data within Salesforce Data Cloud.

## **🚀 Getting Started**

### **Product Overview**

* **[Internal]** [Data Cloud Document AI - Product Overview Presentation](https://docs.google.com/presentation/d/1FWk-GZWYZfrPbhJRZGxcOW4PPfG_PwT3aOr5MN9kZ8U/edit?slide=id.g388899ffc66_0_2667#slide=id.g388899ffc66_0_2667) *Comprehensive slide deck covering Document AI capabilities and use cases*

## **📚 Official Documentation**

### **Core Documentation**

* **[Public]** [Product Documentation](https://help.salesforce.com/s/articleView?id=data.c360_a_document_ai.htm&type=5) *Official Salesforce help documentation for Document AI*
* **[Public]** [Developer Documentation (APIs)](https://developer.salesforce.com/docs/data/connectapi/references/spec?meta=postDocumentAIConfigExtractData) *Technical API reference for developers implementing Document AI*

## **🎓 Learning Resources**

### **Video Demos**

*All demos are internal resources hosted on Google Drive*

* **[Internal]** [GA Capabilities Walkthrough](https://drive.google.com/file/d/1VEEJoMqOQB1ojvL0VnzQnJcNoxFsMIjY/view) *Overview of Generally Available features*
* **[Internal]** [Transactional/API Demo](https://drive.google.com/file/d/1v21EQGzed6gDOxv9oMQFemRIN2BnM5NL/view) *Flow and Configuration Builder UI demonstration*
* **[Internal]** [Advanced Capabilities Demo](https://drive.google.com/file/d/1s3OfvfDT_sp_bKS7Jp2cMs37esTPYrox/view) *Deep dive into advanced Document AI features*
* **[Internal]** [Bulk Pipeline Setup Demo](https://drive.google.com/file/d/1qmaG7bIRh1w5YVOTKrCeOIMf14saECSF/view) *How to configure bulk document processing*
* **[External]** [Bite-sized demo](https://salesforce.vidyard.com/watch/skQLmW6sbUe8FJWkam9ZzG)*Quick overview of Document AI - both Batch and API.* [*Link*](https://salesforce-internal.slack.com/archives/C08G0KA51EY/p1757473013215559)

### **Webinars**

* **[Public]** [May TRE Webinar](https://datacloud.hubs.vidyard.com/watch/8SWKymzCaKtdVYnjAAnywf) *Start at 2:12:40 for Document AI content*
* **[Public]** [August TRE Webinar](https://datacloud.hubs.vidyard.com/watch/GYScjkiX7SGLkqZjt6bzs4) *Start at 1:56:19 for Document AI content*
* [**Internal**] [Asia SE community](https://drive.google.com/file/d/1evlQZBR1I8pyp9KzCdC_79NIZc-lXgWl/view) - on 19th Sept

### **Implementation Guides**

* Simple Contact enrichment screen flow:
  + [contact-enrich-docai.mp4](https://drive.google.com/file/d/1osG-CF4hSYS1KmBo61H0fCNUMAinS5Ef/view)
  + [Document AI cookbook - File-based Contact Enrichment Flow](https://docs.google.com/document/d/1yy7EDfQRf9RgmLbVE1c1p6FquSMJBMJM6ZEXyB6Xwsg/edit?tab=t.0)
* Loan Prequalification Agentforce agent:
  + [docuai-agent2.mp4](https://drive.google.com/file/d/1nxHECsA96px-spkjEhCyo7xAe0HuVBus/view)
  + [Loan Pre-qualification Agent with Document AI - Implementation Guide](https://docs.google.com/document/d/1pE1Yr8xXTO0Z3cwhpPO9yJ4zAJ_meNvpfMpIWG0Bls8/edit?tab=t.rfd61xyli54g)
* [Document AI with Prompt Builder/Flow - Step-by-Step Guide](https://salesforce.quip.com/hIbbAsZGcjqT) *Created by Vishal Tandon and Vivek Kumar - Hands-on implementation guide*

### **Code Samples & Testing**

* **[Public]** [Document AI API - "Hello, World" GitHub Project](https://github.com/ananth-anto/sf-datacloud-idp-testbed) *Sample code and API test application for hands-on experimentation*
* **[Internal]** [GitHub Project Setup Video](https://drive.google.com/file/d/1ywzCiRYxpqQvI5ykHAl_Ln7Ousttx7AU/view) *Video walkthrough on setting up the GitHub project locally for testing and exploration*

## **💬 Community & Support**

### **Internal Resources**

* **[Internal]** [Document AI FAQ Document](https://docs.google.com/document/d/1ABMg533RoIOo0LD5TYY4OiYZhqofZHycaV7HQMhc28E/edit?tab=t.ptxgm3d4uz2g#heading=h.mb8g78zi042z) *Frequently asked questions and answers*
* **[Internal]** [Document AI Slack Community](https://salesforce.enterprise.slack.com/archives/C08H67ESW59) *Join the internal Slack channel for discussions and support*

**Community blog posts/social media mentions**

* **[LinkedIn]** [Using Document AI in Flow/Prompt builder](https://www.linkedin.com/posts/sagarsatishkulkarni_this-demo-highlights-how-salesforce-data-activity-7372978373293305856-cznN?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAER7YYBIKjZ46-lFATtEH9QwaeA884dK5k) (Medical prescription processing) [*Sagar Kulkarni (Data Cloud)*](mailto:sagarkulkarni@salesforce.com)
* **[LinkedIn]** [Using Document AI in Agents](https://www.linkedin.com/posts/akshatasawant02_datacloud-documentai-agentforce-activity-7371525438868840448-eqjO?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAER7YYBIKjZ46-lFATtEH9QwaeA884dK5k) (Resume processing)[Akshata Sawant](mailto:akshata.sawant@salesforce.com)
* **[Blog]** [Process unstructured data using Document AI](https://developer.salesforce.com/blogs/2025/08/process-unstructured-data-with-document-ai?utm_campaign=amer_sfld&utm_content=Salesforce+Developers__sprout-1755630025&utm_medium=organic_social&utm_source=linkedin) (Introductory post) [Akshata Sawant](mailto:akshata.sawant@salesforce.com)
* [**Blog**] [Document AI: Supercharging the Customer 360 Experience in Salesforce Data Cloud and Agentforce](https://www.salesforce.com/blog/document-ai-supercharging-the-customer-360-experience-in-salesforce-data-cloud-and-agentforce/) [Harsha Vardhan Viswanath](mailto:hviswanath@salesforce.com)
* [**LinkedIn**]: [Using Document AI using Postman (Technical how-to)](https://www.linkedin.com/posts/akshatasawant02_salesforce-developers-datacloud-activity-7361711554200768512-ybor?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAER7YYBIKjZ46-lFATtEH9QwaeA884dK5k) [Akshata Sawant](mailto:akshata.sawant@salesforce.com)
* [**LinkedIn**]: [First look at Document AI](https://www.linkedin.com/posts/akshatasawant02_first-look-at-data-clouds-newest-capability-activity-7360958401100640256-lCMB?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAER7YYBIKjZ46-lFATtEH9QwaeA884dK5k) [Akshata Sawant](mailto:akshata.sawant@salesforce.com)
* [**LinkedIn**]: [GA announcement for Document AI](https://www.linkedin.com/feed/update/urn:li:activity:7371273250376450048/) [Ananth Anto](mailto:ananth.anto@salesforce.com)
* [**Blog**]: [Rise of Intelligent Document processing](https://www.linkedin.com/pulse/rise-intelligent-document-processing-unlocking-power-data-shanmugam-ct9cc/) [Sivakumar Shanmugam](mailto:sivakumar.shanmugam@salesforce.com)
* [**LinkedIn**]: [Document AI - Sample code - Reference implementation](https://www.linkedin.com/posts/ananth-anto-b720186_the-response-to-our-document-ai-beta-program-activity-7350772288964710400-7Dwg?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAER7YYBIKjZ46-lFATtEH9QwaeA884dK5k) [Ananth Anto](mailto:ananth.anto@salesforce.com)
* [**LinkedIn**]: [Public Beta launch of Document AI](https://www.linkedin.com/feed/update/urn:li:activity:7333009077054193664/) [Sivakumar Shanmugam](mailto:sivakumar.shanmugam@salesforce.com)
* [Blog post]: [Salesforce strikes gold with Document AI](https://www.deep-analysis.net/salesforce-strikes-gold-with-idp/) *Dan Lucarni (*IDP industry veteran - consultant*)*

## **📖 Additional Reading**

### **Blogs & Articles**

* **[Public]** [Process Unstructured Data with Document AI](https://developer.salesforce.com/blogs/2025/08/process-unstructured-data-with-document-ai) *Salesforce Developer blog on practical applications*
* **[Public]** [Rise of Intelligent Document Processing](https://www.linkedin.com/pulse/rise-intelligent-document-processing-unlocking-power-data-shanmugam-ct9cc/) *LinkedIn article on industry trends and Document AI's role*

## **🔍 Quick Reference**

**For Developers:** Start with the [Developer Documentation](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#core-documentation) and [Step-by-Step Guide](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#implementation-guides) **For Business Users:** Begin with the [Product Overview](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#product-overview) and [GA Capabilities Demo](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#video-demos) **For Support:** Check the [FAQ Document](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#internal-resources) or join the [Slack Community](https://claude.ai/chat/65adfb30-7ae6-46e5-8313-129744a2d735#internal-resources)

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