



DATASHEET · CAPTURE · CLASSIFICATION

Reading every letter just to file it? The document type is set before anyone looks.

AI-DMS classification detects document type, language and direction with every processing run and suggests storage paths, from Premium also sender and recipient. You describe your own types in words, without training.

AT A GLANCE

One type per document, from the system catalog or from your own types. For each type you set retention, legal basis and a default IDP Agent that starts after recognition.

01 · WHAT IT IS ABOUT

Every incoming item needs reading. Its type is already set.

Invoice, bank statement, tax notice or contract: before a document sits in the right folder or moves on to the next step, someone has to read and sort it. Classification does that with every AI-DMS processing run, from the Basic tier up.

INPUT

Every document a workspace processes with AI-DMS

RESULT FROM BASIC

Document type, language and region, direction, summary, keywords, storage paths

FROM PREMIUM

Plus sender, recipient and amounts; visual traits for your own types

ACCESS

Web app, MCP tools `po_documents_document_types_*` and `po_document_analysis_analysis_dms`


One type per document

The AI picks the matching type from the system catalog and your own types. If none fits with enough confidence, the document stays under Other / Uncategorized.

Your own types, no training

A name and an instruction for the AI in English; typical traits and how to tell it apart from similar types. The instruction feeds into classification.

Storage paths and name

For every document, AI-DMS suggests storage paths and a descriptive name. In the document list the paths work as a filter.

Retention per type

Per type, retention years, jurisdiction and legal basis, such as GoBD. When a document is locked as tamper-proof, the period of its type applies.

Default IDP Agent

When AI-DMS recognizes a type, PaperOffice queues the IDP Agent chosen there automatically, in addition to the workspace pipeline.

Workflow triggers

In the start event of a Workflow Agent, the document type acts as a filter, so that every invoice starts the approval, for example.

02 · HOW IT WORKS

Describe, process, review, pass on.

Classification runs with every AI-DMS processing run. You maintain the type catalog, have documents processed and correct where needed.

1

Open the type catalog

Under **Document AI** > **Document Types** you see system and custom types with jurisdiction, retention and IDP Agent.

2

Create your own type

With **New document type**, enter a display name and the **Instruction for the AI**, set period and legal basis on the **Retention** tab, and optionally pick a **Default IDP Agent**.

3

Process documents

The workspace classifies new uploads from AI-DMS Basic. For existing documents, select them, choose **Actions** > **Agents & workflows** > **AI-DMS** and set the tier.

4

Review the result

Type and data fields appear on the document. You correct the type on the **Properties** tab or over MCP with `po_documents_update_index`.

TECHNICAL DATA

FEATURE	DETAILS
Tiers	Basic: type, language, direction, storage paths · Premium: plus sender, recipient, amounts
Catalog	System types per jurisdiction and global, plus your own types
Custom type	Display name, description, instruction for the AI in English, retention, IDP Agent
Retention	Years, jurisdiction, legal basis; mode Compliance (WORM) or None
Fallback type	Other / Uncategorized
MCP tools	<code>po_documents_document_types_list/_create/_update/_delete</code> , <code>po_document_analysis_analysis_dms</code>
Billing	By usage, depending on the tier

03 · IN PRACTICE

Where the document type routes the work.

Receipts at a tax firm

In the test run for our tax advisor guide, AI-DMS recognized invoice, receipt / voucher, bank statement and tax assessment. With an IDP Agent on the bank statement type, the transactions follow.

A custom type for service reports

A service company creates the type Maintenance report and describes it in English: a technician's report with date, asset and signature. It is recognized from the next document on.

Invoices into approval

A Workflow Agent filters its start event on the type Invoice. Every recognized invoice then starts the approval, while contracts and letters pass by.

FREQUENTLY ASKED QUESTIONS

Do I have to train the classification?

No. System types are recognized from the first document. For a custom type you enter a name and a short instruction for the AI in English, with no sample documents needed.

What if a document is assigned the wrong type?

You change the type on the document's Properties tab or over MCP. If you lock the document as tamper-proof later, the period and legal basis of the new type apply.

What is recognized besides the type?

From Basic: language and region, direction, summary, keywords, dates, a name suggestion and storage paths. Premium adds sender, recipient and amounts, and classification also evaluates visual traits.

How do document type and IDP Agent fit together?

You set a default IDP Agent on the type. When AI-DMS recognizes that type, PaperOffice queues the agent automatically, in addition to the workspace pipeline; duplicate agents are merged.

GET STARTED

Let your next incoming document be classified.

Create an account at app.paperooffice.ai, choose a workspace with AI-DMS Basic or higher and upload documents. You create your own types under [Document AI › Document Types](#).

paperooffice.ai/en/ai-classification-and-automatic-categorization



MORE ABOUT THE MODULE

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