



DATASHEET · UNDERSTAND · CONTACTS AND RELATIONS

Typing contacts off letterheads? Now every document creates its sender.

Relations AI turns the senders of processed documents into organizations, with contact persons and all linked documents. Deadlines from the documents appear with their organization. For teams who want to know what is going on with whom.

AT A GLANCE

Organizations and people come from Document AI. Matching by VAT ID, IBAN and the sender registry, and every document is linked to its organization.

01 · WHAT IT IS ABOUT

Senders are on paper. Relations AI knows them.

Keeping a contact list by hand means typing off letterheads and later searching for which invoice belongs to which supplier. In PaperOffice, organizations and people come from document processing, and every document is linked to its sender.

INPUT

Documents processed with AI-DMS Premium or Ultra

RESULT

Organizations with contact persons, document links and deadlines

MATCHING

By VAT ID, IBAN, sender registry and name, people by email

ACCESS

Relations AI in the web app, REST API and MCP

**Organizations from documents**

When Document AI recognizes a sender, PaperOffice creates it as an organization with address and VAT ID, or links the existing one.

Contact persons

If a person of the sender appears in the document with an email, they are created under the organization with name, email and phone.

Matching before creating

Before creating anything, PaperOffice looks up the organization by VAT ID, IBAN, sender and name. If it exists, the document is linked there.

Document links

Every organization shows its linked documents and the most recent one. One click opens them in the Document Hub.

Document deadlines

Payment due dates, contract ends, resubmissions and other deadlines from the fields, sorted by due date, with a count of overdue ones.

Sender registry

Detected senders with document count, city, country and industry, matched against the central publisher database. One click shows the documents.

02 · HOW IT WORKS

Process, review, keep track.

Relations AI keeps itself current from processing. You process documents as usual, and organizations and people are created along the way. You see the result in three areas.

1

Process documents

Select documents and choose the Premium or Ultra tier under **Actions › Agents & workflows › AI-DMS**. Senders and fields come from this processing.

2

Open organizations

Relations AI › Organizations lists organizations with sender, people and documents. Use **Open in Document Hub** to see all linked documents.

3

Find people

Relations AI › People searches the contact persons of all organizations, with email, phone and organization.

4

Network and deadlines

Relations AI › Network shows coverage, publisher detection and document deadlines. Use **Publishers** to open the sender registry.

TECHNICAL DATA

FEATURE	DETAILS
Source	Sender and party fields from AI-DMS Premium and Ultra
Organization	Name, address, VAT ID, email, sender link, linked documents
Person	Name, email, phone, assignment to the organization
Deadlines	Payment due, contract end, resubmission, other deadline
Permissions	Document links and deadlines follow the user's workspace permissions
API and MCP	GET /knowledge_graph/partners, /analytics/contact-stats; po_knowledge_graph_partners_get
Plan	Relations AI is included in the Corporate plan

03 · IN PRACTICE

Where Relations AI helps every day.

New supplier in the inbox

The first invoice from a new supplier arrives. After processing, the supplier is in Relations AI as an organization with VAT ID and address, and the invoice is linked to it.

Everything on one partner

Before a meeting, the buyer opens the organization and sees the linked documents, the latest incoming document and the contact persons at a glance.

Deadlines in view

A contract is ending, an invoice is coming due. Both deadlines appear in the network under document deadlines, with organization and document, and overdue items are counted.

FREQUENTLY ASKED QUESTIONS

Do I have to create contacts myself?

No. Organizations and people come from Document AI. When processing recognizes a sender, PaperOffice creates the organization or links the document to the existing one. You can edit the master data.

Who sees which documents and deadlines?

Document links and deadlines follow workspace permissions. A team member sees the documents from their workspaces. Password- and SMS-protected workspaces stay hidden until they are unlocked in the session.

How are duplicate entries avoided?

Before creating anything, PaperOffice searches by VAT ID, IBAN, sender and name. A new organization is created when there is a clear identifier, such as a VAT ID or a known sender. People are matched by email.

Which processing and plan do I need?

AI-DMS provides sender and party fields from the Premium tier. Relations AI itself is included in the Corporate plan. Processing is billed by usage, depending on the tier.

GET STARTED

Process documents and let contacts build themselves

Process a few invoices or letters with AI-DMS Premium, then open **Relations AI › Organizations** . The detected senders are listed there with their documents.

paperoffice.ai/en/ai-contact-extraction-relationship-management



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-contact-extraction-relationship-management

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact