



DATASHEET · CREATE · CREATOR AGENT

Every quotation starts with a blank page?

Now the agent writes the draft from your own sources.

The Creator Agent writes quotations, letters and certificates on your template. It takes prices and rules from your knowledge bases, the recipient from Relations AI and the sender from your company profile. For sales, admin and anyone who creates documents to a pattern.

AT A GLANCE

You describe the document in your own words. The agent shows a watermarked preview and asks follow-up questions. The PDF is created as soon as you confirm it.

01 · WHAT IT IS ABOUT

Quotations are written by hand. The agent writes the draft.

For every quotation, someone copies prices from the list, looks up the customer address and rewrites the text. The Creator Agent takes over this work: it knows your template and your sources, asks when details are missing and stores the finished PDF in the workspace.

INPUT

A request in your own words: customer, items, quantities, dates

SOURCES

Up to 20 knowledge bases, 30 pinned articles, Relations AI, company profile

RESULT

PDF in the chosen workspace, with a sequential number if you like

ACCESS

Web app, API and MCP, included in the Corporate plan

**Facts from your sources**

Up to 20 knowledge bases per agent and up to 30 pinned articles such as the price list. If you like, the agent also reads your documents.

Recipient and sender

Address and contact person come from matching entries in Relations AI, your company data from the company profile in the account settings.

Figures with a source

By default, the agent fills number fields exclusively with amounts and quantities found in a source, a fixed value or your request.

Questions instead of guesses

If a detail is missing, such as the contact person, the agent asks with the preview. If several companies match the name, it asks which one you mean.

Watermarked preview

The preview shows the finished layout and stores nothing in the workspace. It stays valid for 24 hours; after that, you create a new one.

Numbers and writing rules

Sequential numbers in your pattern, such as A-2026-0042. Plus tone, form of address, language and an instruction of up to 8,000 characters.

02 · HOW IT WORKS

Set it up once. After that, one sentence will do.

A Creator Agent belongs to one template and one target workspace. You set it up once; after that, you describe each new document the way you would brief a colleague.

1

Create the agent

Under **Document AI > Creator Agent**, click **Create Creator Agent**, choose template and workspace, and connect knowledge bases on the **Knowledge** tab.

2

Set the rules

Choose tone, form of address, language and AI tier. On the **Numbers & fixed values** tab, set up numbering and fixed values.

3

Describe the request

Click **Create document** on the agent, enter customer, items and quantities in your own words, then **Create preview**.

4

Check and create

On the **Preview & questions** tab, you answer questions and check the PDF. **Create document** stores it in the workspace.

TECHNICAL DATA

FEATURE	DETAILS
Output	PDF in the agent's workspace; preview as a watermarked PDF
Templates	HTML templates with versions; starter templates quotation, invoice, letter, certificate (DE, EN)
Sources	Knowledge bases, pinned articles, Relations AI, company profile, Documents (read only)
AI tiers	Basic, Premium or Ultra, chosen per agent
Approval	Check the preview (default) or create directly once all details are complete
Billing	By usage, depending on the AI tier
API and MCP	POST /document_generation/creator-agent-preview and .../creator-agent-run; po_documents_creator_agent_run

03 · IN PRACTICE

Where the Creator Agent writes in daily work.

Quotation from the price list

Sales writes: "Quotation for Nordlicht Energie, standard maintenance package, 12 months." The agent takes the prices from the pinned price list and asks for the contact person.

Certificates of attendance

Course name and date are stored as fixed values in the agent. For each certificate, the participant's name is enough; the numbering counts on by itself.

Customer letters in one tone

Admin sets tone and form of address once, plus an instruction such as "Always mention our hotline in the closing text." From then on, every letter sounds the same.

FREQUENTLY ASKED QUESTIONS

Where do the figures in the document come from?

From your sources: pinned articles, knowledge bases, fixed values and your request. By default, number fields without a source stay empty. Still, check the preview before you create the document.

Is the document stored right away?

In the web app, you first see the watermarked preview, which stores nothing in the workspace. The PDF is created with [Create document](#). For API and MCP, direct creation can be switched on.

Does the agent send the documents?

The agent works with read rights: it stores the PDF in the workspace and sends, changes or deletes nothing. You then send it to the recipient yourself.

Which templates can I use?

Your own HTML template with versions. To get started, there are templates for quotation, invoice, letter and certificate in German and English. A template can also be created from a DOCX, ODT, RTF, HTML or TXT file in the DMS.

GET STARTED

Create your first Creator Agent.

Open [Document AI > Creator Agent](#), choose a starter template and pin your price list. The first preview shows what the agent makes of it.

paperoffice.ai/en/ai-creator-agent-quotes-letters-pdf



MORE ABOUT THE MODULE

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PRICING

paperoffice.ai/en/pricing

CONTACT

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