



DATASHEET · CREATE · DOCUMENTS FROM TEMPLATES

Copying every quote together in Word again?

Now the API fills your template with data.

Documents from templates turns your HTML template with placeholders and your data into a PDF and stores it in the workspace you choose. For developers and teams that create quotes, invoices, letters or certificates from their own systems: via REST API and via MCP.

AT A GLANCE

Placeholders, lists and calculation helpers in the template, checked required fields and a PDF stored in the workspace like an upload. In every plan via REST API and MCP.

01 · WHAT IT IS ABOUT

Copy, adjust, export. Or: one template, then data.

Quotes and letters often start from the last file: copy it, replace the names, recalculate the totals, save as PDF, file it. With documents from templates, you set up the layout once. After that you only send the data for each document, and the PDF lands in the workspace.

INPUT

HTML template with placeholders and variables as JSON, or Markdown/HTML up to 5 MB

OUTPUT

PDF in the chosen workspace, stored like an upload; the response returns the pdfid

ACCESS

REST API /document_generation/... and MCP tools po_templates_* and po_documents_create_from_*

PAGE

A4, A3, A5, Letter or Legal, portrait or landscape, margins in mm, header and footer


Placeholders and lists

{{variable}} inserts values HTML-safely, {{#each}} repeats a block per entry and {{@number}} counts along, for example for line items.

Calculations in the template

sum, sum_product, multiply and calculate build totals and formulas, while format_number and format_date format numbers and dates.

Required fields checked

If a field from variables_schema.required is missing, the API answers with MISSING_REQUIRED_VARIABLES and names it. No document is created then.

Stored like an upload

Before storing, PaperOffice checks the upload permission and the security level of the workspace. The PDF is stored encrypted like any document.

Safe renderer

Scripts, forms, iframes, SVG and external sources are removed. The renderer never loads anything from outside.

Versions and preview

Included in the Corporate plan: the [Document templates](#) page with starter templates, preview with sample data, checks, conditions and versions.

02 · HOW IT WORKS

Create a template, send data. Find the PDF in the workspace.

There are two ways to a PDF: render Markdown or HTML directly, or fill a stored template with variables. Both store the result in the workspace.

1

Create a template

Use POST `/document_generation/template-create` to store an HTML template with placeholders, page format, margins and required fields.

2

Send data

Call `create-from-template` with `template_id`, `workspace_id` and the variables as JSON, including lists for line items.

3

PDF in the workspace

The response comes back with 201 Created and the `pofid`. An AI-DMS automation in the workspace processes the PDF like any upload.

4

Maintain it in the app

In the Corporate plan, on the `Document templates` page: create one `From starter`, `Check template`, test it in `Preview` and restore older versions under `Versions`.

TECHNICAL DATA

FEATURE	DETAILS
Output format	PDF
Placeholders	{{variable}}, {{#each}} with {{@index}} and {{@number}}, today, now, year, month, day, time
Page layout	A4, A3, A5, Letter, Legal; portrait or landscape; margins 0 to 100 mm; header and footer per template
Content	Markdown or HTML up to 5 MB, custom CSS, header and footer up to 512 KB
Idempotency	<code>idempotency_key</code> (8 to 128 characters) returns the same result for 24 hours without a second document
REST API	<code>/document_generation/</code> : <code>create-from-content</code> , <code>create-from-template</code> , <code>templates-list</code> , <code>template-create</code>
MCP tools	<code>po_documents_create_from_template</code> , <code>po_documents_create_from_content</code> , <code>po_templates_list</code> , <code>_get</code> , <code>_create</code> , <code>_update</code>

03 · IN PRACTICE

Data turns into documents. In your layout, in your workspace.

Quotes from your shop or CRM

A program sends the customer number, line items and validity to create-from-template. The quote with totals lands as a PDF in the sales workspace, and the pofid goes back to the CRM.

Certificates in series

HR creates certificates from one template. Only the name and details change per person, while layout, header and footer stay the same.

Documents via AI assistant

In Claude or Cursor, po_documents_create_from_template creates a cover letter from your template and stores it in the workspace you want.

FREQUENTLY ASKED QUESTIONS

How do create-from-content and create-from-template differ?

create-from-content renders the Markdown or HTML you send.
create-from-template fills a stored template with your variables and uses its page format, margins, header and footer.

Are there ready-made templates to start with?

Yes, in the Corporate plan: starter templates for quotation, invoice, business letter and certificate, each in German and English. On the [Document templates](#) page, use [From starter](#) to create your own template from one.

Where is the PDF stored?

In the workspace you specify with workspace_id, just like an upload. You need upload permission there. If the workspace has an AI-DMS automation, it processes the PDF like any new document.

Who can create and change templates?

The main account and admins. template-delete deactivates a template, and template-update with is_active turns it back on.

GET STARTED

Build your first template and create your first PDF.

Create an API key in your PaperOffice account and send your template to template-create. Billing is usage-based.

paperoffice.ai/en/ai-document-generation-pdf-templates-api



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-document-generation-pdf-templates-api

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact