



DATASHEET · AGENTS · IDP AGENT

Still typing values by hand? Every field comes with its source.

An IDP Agent reads defined fields from invoices, bank statements, contracts and forms, each with its page and location in the original. You describe the fields in plain words or start from a template. Built for accounting teams, law and tax firms and developers.

AT A GLANCE

Your fields as structured data: with type, rule and source location for every value, and tables row by row. If a required field is missing, the document goes to review.

01 · WHAT IT IS ABOUT

Every layout is different. Your fields stay the same.

Suppliers, banks and authorities send every document in their own layout. Typing values by hand or maintaining a template per sender hardly keeps up. An IDP Agent reads your fields from the content, stores each value with its source location and shows what is missing.

INPUT

PDF, JPG, PNG and TIFF, from your workspace, uploaded files or the REST API

RESULT

Fields with value, page and source location, tables as rows, export as JSON, CSV, Excel

MODELS

9 tiers from Basic to Ultra Pro Max, up to 200 fields per agent

ACCESS

Web app, REST API and MCP, included in all plans

**Fields in plain words**

Each field gets a prompt in natural language, such as "gross amount of the invoice", plus a label, a key name and a category.

Template or sample document

Start from a template such as the bank statement template, or let the agent suggest fields from a selected sample document.

Rules per field

15 field types from date to IBAN, a search scope on specific pages, patterns, allowed values and a rule for what happens when a value is missing.

Source location for every value

Every value comes with its page and position in the original. In the data fields, the snippet it came from sits right next to the value.

Tables row by row

Line items and transactions are read as a table. One button copies all rows for Excel, for example to match them against receipts.

Review missing required fields

If a required field is missing, a task is created in the review queue you selected. The **IDP Review** view lists every document with open fields.

02 · HOW IT WORKS

Define it once. Use it on every document.

An IDP Agent stores fields, rules, model and output language. Before saving, you check it in a test run; after that it runs on one document, on many at once or automatically in the workspace.

1

Create the agent

Select a sample document, then **Actions > Agents & workflows > IDP** and **Create new agent**. Pick a template or describe the fields in plain words.

2

Set fields and model

Set type, prompt and rule for each field. Under **Change AI model**, choose the model tier that fits the number of fields and pages.

3

Test and save

Start full test run shows result, confidence, page and source location per field, up to 10 times in a row if you like. Then **Save and close**.

4

Apply

In the **Data Fields** tab, use **Apply Agent** for one document, **Actions > Agents & workflows > IDP** for many, or let it run automatically in the workspace after AI-DMS processing.

TECHNICAL DATA

FEATURE	DETAILS
Input formats	PDF, JPG, PNG, TIFF
Model tiers	Basic, Premium, Ultra, each with Pro and Pro Max · up to 10, 25 or, in Ultra Pro, 200 fields
Field types	15, including text, number, currency, date, IBAN, address, table, barcode, QR code
Output	Value and value_raw (ISO date, amount as number), page, bounding box; export JSON, CSV, .xlsx
Output language	Language of extracted values selectable, plus number, date and currency format
REST API	POST /documents/idp-agent-run · ad hoc: POST /job/add/workflow, template=document_idp with idp_collection
MCP tools	po_documents_idp_agent_run, po_documents_idp_collections_list, po_extraction_* per template

03 · IN PRACTICE

Wherever fixed fields matter, the IDP Agent reads them.

Bank statements at a tax firm

The bank statement template reads 13 fields, from account holder to closing balance. In our test run all 13 had a value, and the 8 transactions came as a table with date, description and amount.

Invoices from n8n

An n8n workflow sends every invoice to the API with `idp_collection=invoice`. In the test, supplier, number, amount and due date came back from three layouts, including a scan without a text layer.

Fixed fields in the mail intake

AI-DMS detects type, sender and deadlines. For fixed fields with a source location, such as IBAN or order number, an IDP Agent runs automatically in the workspace after processing.

FREQUENTLY ASKED QUESTIONS

Do I need templates or training data?

You describe the fields in plain words or let them be suggested from a sample document. The template catalog with invoices, delivery notes, bank statements, ID documents and US tax forms is a starting point.

What happens when a value is missing?

You decide per field: required with review, soft review hint, default value or allow empty. With a review queue selected, a task is created; review tasks are included in the Professional plan.

How do I know the agent reads reliably?

The test run shows result, confidence, page and source location per field. Repeat it 3, 5 or 10 times in a row and compare whether the values stay the same.

Can an agent run automatically?

Yes. In the workspace you choose IDP Agents that run in your order after AI-DMS processing. You can also set a default IDP Agent per document type, which then runs as well.

GET STARTED

Build your first agent on a real document

Create an account at app.paperoffice.ai, upload a document and create your first agent via [Actions > Agents & workflows > IDP](#). Billing is based on usage and depends on the model tier.

paperoffice.ai/en/ai-idp-intelligent-document-processing-automation



MORE ABOUT THE MODULE

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