



DATASHEET · CAPTURE · HOLDDED

Invoice open or paid? Looking it up again?

Now your agent tells customers the status.

The connection reads sales orders, invoices, credit notes and products from Holded. After a proof, the website chat and the conversation agent tell your customers the status. For businesses that invoice with Holded. One API key is all it takes.

AT A GLANCE

Five invoice statuses: open, paid, overdue, canceled, credit note issued. Plus the shipping status of every order. On request, new documents are filed once as a PDF in a workspace.

01 · WHAT IT IS ABOUT

Customers ask about invoices. The agent checks in Holded.

“Has my invoice been paid?” “When will my order arrive?” Today, every one of these questions means someone opens Holded and looks up the document. With the connection, PaperOffice mirrors orders and invoices, and your agent states the status on its own once the customer has verified who they are.

SOURCE

Holded API v2 at api.holded.com, connected with your API key

WHAT IS READ

Sales orders, invoices, credit notes, products and contacts

ANSWERS

In the website chat and on the phone, after the customer provides proof

ACCESS

Read-only: every call is a GET, nothing changes in Holded

**One API key is enough**

You enter the key; the address api.holded.com is built in. PaperOffice stores the key encrypted.

Invoices and credit notes

With number, date, due date, amount and status: open, paid, overdue, canceled or credit note issued.

Sales orders

Orders with shipping status and delivery date. If an order has a tracking number, it becomes a shipment in the mirror.

Proof through contacts

Postal code, phone and email come from the Holded contacts. Customers verify with invoice or order number plus postal code, an SMS code or the caller number.

Fresh at proof time

If an order is missing from the mirror or older than 15 minutes, PaperOffice fetches it straight from Holded during the proof.

Documents as PDF in the archive

On request, PaperOffice files new invoices, credit notes and orders once as a PDF in a workspace. The status stays in the mirror.

02 · HOW IT WORKS

Key, preview, answers.

You set up the source yourself in the web app. After the preview, the sync runs on its interval, and your conversation agents answer questions about invoices and orders.

1

Create an API key

Create an API key in Holded. That is all the connection needs.

2

Add the source

Under **Knowledge Base AI · Operational sources**, click **Add source**, choose Holded as the connection and enter the key in the **API key** field.

3

Preview and sync

With an invoice or order number as reference, the **Preview** tab tests the connection. Then save and choose **Sync now**.

4

Proof and answers

On the **Proof** tab, choose the allowed proofs. Your agent then states the status in the **Website chat** and on the phone.

TECHNICAL DATA

FEATURE	DETAILS
Connection	Holded API v2 (api.holded.com), sign-in with API key, every path is checked
What is read	Sales orders, invoices, credit notes, products, contacts for the proof
Invoice status	open, paid, overdue, canceled, credit note issued
Sync	Every 180 minutes by default, adjustable from 15 minutes to 7 days, plus Sync now
Proof	Invoice or order number + postal code, SMS one-time code, or caller number, valid for 15 minutes
PDF filing	Optional: invoices, credit notes, orders with a document number from saving on, once per document
Plan	Operational sources from the Plus plan, answers in chat and on the phone from the Professional plan

03 · IN PRACTICE

Where the connection helps every day.

Question about an invoice

A customer asks in the website chat whether his invoice is still open. He enters the invoice number and postal code, and the agent states the status from Holved, such as paid or overdue.

Call about an order

A customer calls to ask about her order. After the SMS code, the agent states the shipping status and delivery date from Holved.

Documents filed on their own

From the moment you save, every new invoice and credit note lands once as a PDF in the chosen workspace. There PaperOffice processes it like any other document in that workspace.

FREQUENTLY ASKED QUESTIONS

Which data does PaperOffice read from Holved?

Sales orders, invoices, credit notes and products. Postal code, phone and email for the proof come from the contacts. Orders with a tracking number become shipments in the mirror.

How current is the data?

The sync runs on the interval you set, every 180 minutes by default. During a proof, PaperOffice also checks: if the order is missing from the mirror or older than 15 minutes, it comes straight from Holved.

Does PaperOffice change anything in Holved?

No. Every call is a read-only GET to the Holved API, and every path is checked before the call. For PDF filing, too, PaperOffice reads the documents without changing them.

How do the documents get into the archive as PDF?

Choose a workspace in the `Workspace for the documents` field. From the moment you save, PaperOffice files new invoices and credit notes once as a PDF, and on request orders with a document number too. The same file never comes in twice.

GET STARTED

Connect Holved and hand off status questions

Sign in to the web app and, under `Knowledge Base AI > Operational sources`, add a source with the Holved connection. The preview shows right away whether the key works.

paperoffice.ai/en/ai-holved-integration-invoice-status



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-holved-integration-invoice-status

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact