



DATASHEET • AGENTS • WORKFLOW AGENTS

Waiting for someone to code every process? Now one sentence is enough.

Workflow Agents run document processes that you describe in plain words: move documents, set fields, create tasks, report results. A trigger starts each run, and every step is logged. Built for business teams, operations and IT.

AT A GLANCE

From a sentence to an instruction, from a test run to automation: the agent plans the steps, uses the DMS tools and brings in a person wherever you decide.

01 · WHAT IT IS ABOUT

A rule for every special case? One sentence, and the agent acts.

Classic workflows need a rule for every case and someone to maintain it. Workflow Agents work from an instruction built from your description: the model reads the document, plans the next steps and calls the DMS tools. Tests and approvals set the boundaries.

TRIGGERS

After AI-DMS, metafield change, completed task, approval, signature, or manual

TOOLS

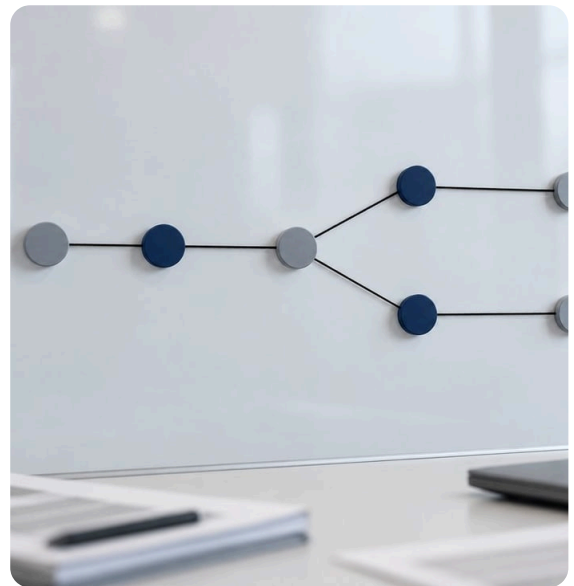
Set fields, move, rename, redact, create tasks and review requests

CONTROL

Dry-run before automation, optional execution approval, a log for every run

ACCESS

Web app, REST API and MCP, included in the Professional plan

**Prompt Studio**

Describe the process in your own words. Prompt Studio turns it into the agent instruction and shows detected rules, success criteria and tools.

Testing without side effects

The dry-run plays the instruction through on a test document. Changing actions are simulated server-side, and the document stays unchanged.

Automation only after approval

Automation mode stays locked until the prompt is approved and a test has succeeded. If you like, a person confirms every execution.

Minimum AI-DMS tier

Every agent requires a minimum tier on the document. If a document is below it, PaperOffice catches up on processing in automation mode.

People in the process

The agent creates tasks or requests a human review. Tasks appear in the web app and in the mobile app.

Results to your systems

Webhook targets report every successful or failed run, for example to n8n or your own URL, signed and with up to 10 retries.

02 · HOW IT WORKS

Describe, test, then let it run.

A Workflow Agent combines a trigger, a minimum AI-DMS tier, the approved instruction and a model tier. Every run then appears in the executions with its steps and duration.

1

Create the agent

Under **Workflow AI > Workflow Agents**, use **Create Workflow Agent** to choose a name, **Trigger** and model tier, for example after AI-DMS in an invoices workspace.

2

Write the instruction

In **Prompt Studio**, describe the process, for example "move payment reminders to the Accounting workspace", then **Create agent instruction**.

3

Check in a dry-run

Start dry-run on a test document shows steps, tools and planned changes. Nothing is changed in the process.

4

Turn on automation

After approval and a successful test, enable **Automation mode**. Every run then appears under **Executions**.

TECHNICAL DATA

FEATURE	DETAILS
Triggers	After AI-DMS, metafield change, completed task, approval or signature; manual via button, API, MCP
Filters	Workspace, document type, metafield key, protection against repeated triggers
Model tiers	Workflow Agent Basic, Premium, Ultra: from clear flows to analysis and trade-offs
Control	Dry-run, prompt approval, spending limit per run, optional execution approval
Log	Status, document, duration, step history and tool timeline with every change
REST API	/workflow_templates/agent_add, agent_update, agent_list, agent_get, agent_run_on_document
MCP tools	po_workflow_agent_add, _update, _list, _get, _run_on_document

03 · IN PRACTICE

Wherever documents create work, a Workflow Agent takes over.

Mail intake by rules

"Move payment reminders to the Accounting workspace and email them to the team lead." The agent applies this plain-language rule to every incoming document once processing is done.

Cancellations to review

The agent moves a cancellation with a deadline to the Legal workspace and puts it into review there. A person decides before anyone acts.

Report results to n8n

After every run, a webhook target reports the result to n8n, with placeholders such as `trigger.pofid` in the path or headers. Your system verifies the signature and fetches the data.

FREQUENTLY ASKED QUESTIONS

Do I need programming skills?

You describe the process in your own words, and Prompt Studio turns it into the instruction. Developers can also create agents through the REST API or MCP and run them on individual documents.

Which model works in the workflow?

You choose per agent: Basic for simple, clearly structured flows, Premium for multi-step workflows with conditions and Ultra for complex analysis and trade-offs.

How do I stay in control?

Before automation comes the dry-run, in which changing actions are simulated. Automation mode stays locked until the prompt is approved. With execution approval, a person also confirms every run.

Can I see what an agent did?

Yes. Under **Executions**, every run is listed with status, document and duration, plus the step history and a tool timeline showing every change. Simulated steps are marked as simulations.

GET STARTED

Describe your first process in one sentence

On the Professional plan, create your first agent under **Workflow AI > Workflow Agents**, describe it in **Prompt Studio** and test it in a dry-run. Billing is based on usage and depends on the model tier.

paperoffice.ai/en/ai-workflow-agents-agentic-process-automation



MORE ABOUT THE MODULE

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