



Old receipts buried in boxes?

From now on, the retention date sits on the document.

Invoices, bank statements and contracts stay in the archive for years, often in boxes with a year written on the label. This guide shows step by step how PaperOffice keeps the retention period on the document type, locks documents with WORM and keeps the evidence ready for a tax audit.

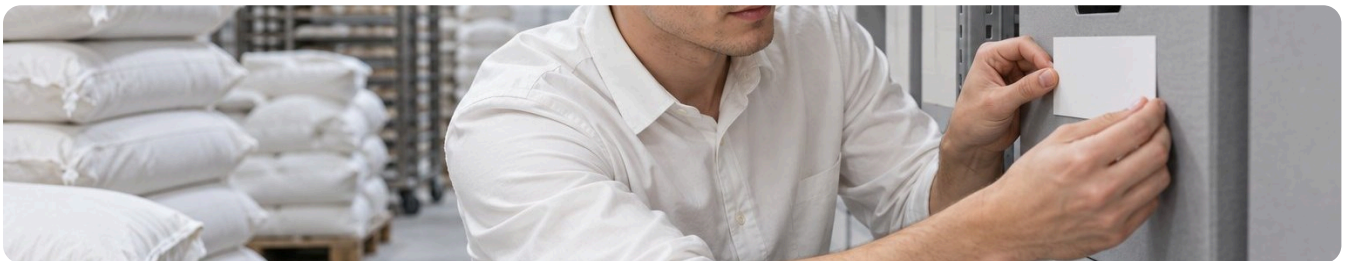
TRY IT YOURSELF IN 45 MINUTES

One archive year of a bakery in six files: two invoices, a maintenance contract, a bank statement, a till receipt and older records as a ZIP. Includes a test package to follow along.

WHY THIS GUIDE

Filing is quick. Proving it takes years.

A record has to stay unchanged until its retention period ends, and you have to be able to show it whenever someone asks.



In many businesses, the archive is a room in the basement. The boxes show a year, and usually only the person who packed them knows the retention period. On the shared drive next door, any file can be changed, moved or deleted.

This guide shows how PaperOffice brings order to this: the retention period belongs to the document type, the WORM lock to the single document, and change history, legal hold and export provide the evidence. Every step comes with its click path, and with the test package you can try it in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice

WHO THIS IS FOR

Accounting

You file records and need to find them unchanged years later.

Management

You are responsible for retention and want to know what may go and when.

Tax advisors

You agree on retention periods with the business and support the audit.

WHAT YOU CAN DO AFTERWARD

Set up a Business workspace for the archive, check retention periods per document type and create your own types, import older records, lock documents with a period start, prove changes, place a legal hold and export records for the audit.

OVERVIEW

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AT A GLANCE

- System types such as invoice, bank statement or contract bring retention years and apply globally; their legal basis is a general note. You create your own types with your values.
- From the Business workspace type on, "Activate WORM retention" locks a document with WORM, with the period starting immediately or at the end of the year.
- The file then stays unchanged. Deleting, moving and renaming are blocked until the period ends, and the document shows the end date and days remaining.
- The Revisions tab shows changes with old and new value, user and time. A legal hold blocks deletion with a reason.
- For the audit, you filter by document type, select the documents and export the data together with originals and OCR text.

01 · A BOX LABELED 2021

A tax audit is announced. The receipt is in the basement.

Tuesday, 7:30 a.m. Gisela Hartung runs the accounting at Backhaus Wendeler GmbH, a family bakery with a central bakehouse and several shops. On her desk lies the notice of a tax audit.



She needs the invoice for the new deck oven from 2021. In the basement archive, gray boxes stand next to the flour sacks, each marked with a year. Which box holds which records is something Ms. Hartung knows best.

The maintenance contract for the ovens sits on the shared drive in three versions, and nobody knows which one applies. Newer invoices arrive as PDFs by email and end up in subfolders.

At the end of every year, the same question comes up: which boxes may go, and which have to stay?

Gisela Hartung

Accounting. Knows the archive and pulls the records together for the audit.

Timo Brandt

Junior accountant. Labels the boxes and looks after the shared drive.

Bernd Wendeler

Owner. Wants to be sure that nothing is missing during the audit.

THE REAL HURDLE

An archive is only judged when someone asks. At that point it must be clear how long a record stays, that it is unchanged and where it is.

02 · WHAT HOLDS THE ARCHIVE UP

Four time sinks. Visible only in the audit.

Hardly any record is hard to find if you know where it is. The time goes into the fact that the retention period, the valid version and the location are nowhere on the record itself.

The period is on the box

The label shows a year. Which period applies to invoices, contracts or business letters is not written there.

Files stay editable

On the shared drive, any file can be overwritten, moved or deleted. Nothing there shows which version applies.

Searching boxes

When the audit asks for one year's records, the search starts on shelves and in subfolders.

Missing evidence

Who changed what and when, and why a record is still there, can rarely be shown.

TIME SINK	HOW PAPEROFFICE HELPS	CHAPTER
Period on the box	Years, jurisdiction and legal basis on the document type	05, 06
Files stay editable	WORM lock with a period start, deletion blocked until the period ends	09, 10
Searching boxes	Search across full text and scans, filter by document type	12
Missing evidence	Revisions tab, legal hold with a reason, compliance certificate	10, 11

WHAT REMAINS WITH YOU

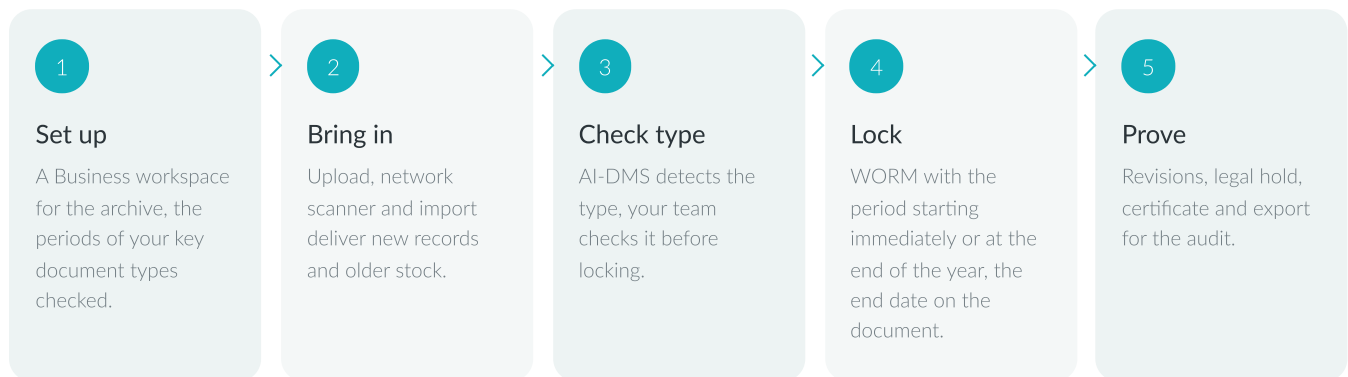
Deciding which retention periods apply to your document types and whether your process meets your obligations. You settle this with your tax advisor. PaperOffice keeps the periods, locks the documents and provides the evidence.



03 · THE PROCESS AT A GLANCE

Five stages. From intake to the audit.

Every document follows the same path, whether it is new or comes from older stock.



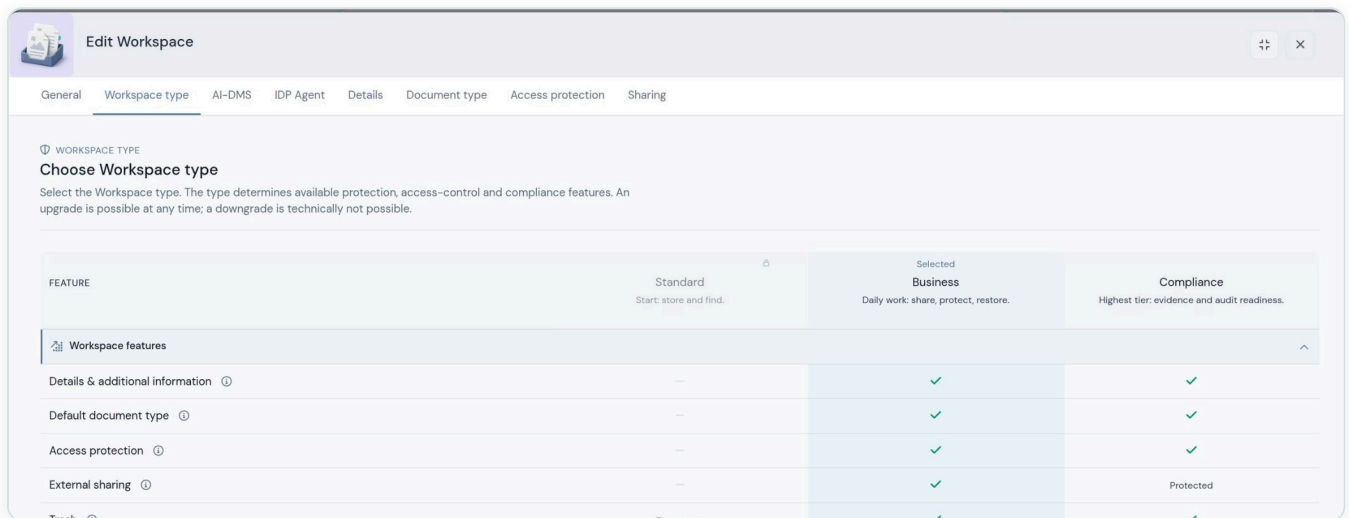
STAGE	WHAT PAPEROFFICE DOES	WHAT YOU DECIDE
Set up	keeps years, jurisdiction and legal basis per type	which periods apply, with your tax advisor
Bring in	accepts files, scans and ZIP archives, skips duplicates	which channels and which years
Check type	detects the type, shows name and summary	who checks and corrects
Lock	calculates the end date, locks the file and deletion	when and with which period start
Prove	shows changes, blocks via legal hold, exports	who places legal holds and exports



04 · A WORKSPACE FOR THE ARCHIVE

A workspace for the archive. Of type Business.

Under **Document AI** > **Workspaces**, use **Create New Workspace** to add a workspace, for example “Archive Backhaus Wendeler”. Under **Workspace type**, choose Business.



- Workspace type Business.** From Business on, a document can be locked with WORM. A workspace can be upgraded at any time, for example to Compliance later.

Recycle bin

In Business and Compliance, deleted documents go to the recycle bin and can be restored.

Default document type

On the Document type tab, you give new documents a default type. With “Automatic recognition”, AI-DMS sets the type.

PaperOffice Cloud

Documents are locked in the PaperOffice Cloud. The storage mode is fixed when the workspace is created.

AI-DMS LEVEL

Under **AI-DMS**, you choose the level for new documents. AI-DMS detects the document type from Basic on, and Premium also reads sender, recipient and amounts. New workspaces start with Premium.

05 · RETENTION PERIOD AND LEGAL BASIS PER DOCUMENT TYPE

The period follows the type. Not the box.

Under **Document AI** > **Document Types** you find the catalog: system types per jurisdiction and your own types. Types with retention carry years, legal basis and the WORM switch.

Q contract		Options		+ New document type		
INTERNAL KEY	DEFAULT IDP AGENT	LEGAL BASIS	DOCUMENTS	WORKSPACES	RETENTION	JURISDICTION
Contract						
Contracts and contra	contract	—	Varies by jurisdiction (set retention to local law)	3	0	🔒 WORM 10 years SYSTEM
Employment Contract						
Employment and serv	employment_contr...	—	—	2	0	🔒 WORM 10 years SYSTEM
Contract Amendment						
Amendments changir	amendment	—	—	2	0	🔒 WORM 10 years SYSTEM
Maintenance contract						
	maintenance_contr...	—	Internal retention rule, agreed with tax advisor	2	0	🔒 WORM 10 years 
Termination Notice						
Notices terminating c	termination_notice	—	—	1	0	🔒 WORM 10 years SYSTEM

- The catalog.** The “Only with retention” filter shows the types with a WORM period, here with the search “contract”. Each row shows legal basis, retention with years and jurisdiction: system types are marked “System” and apply globally, your own type “Maintenance contract” applies to Germany.

System types

Types such as invoice, bank statement or contract bring their years, apply globally and carry a general note as legal basis, many none at all. They are marked “System” and are read-only.

Your own types

If a period differs for you or a type is missing, create your own (chapter 06). You can edit your own types at any time.

Jurisdiction

The catalog shows “Your region + global”. With “All jurisdictions” you see the types of other countries.

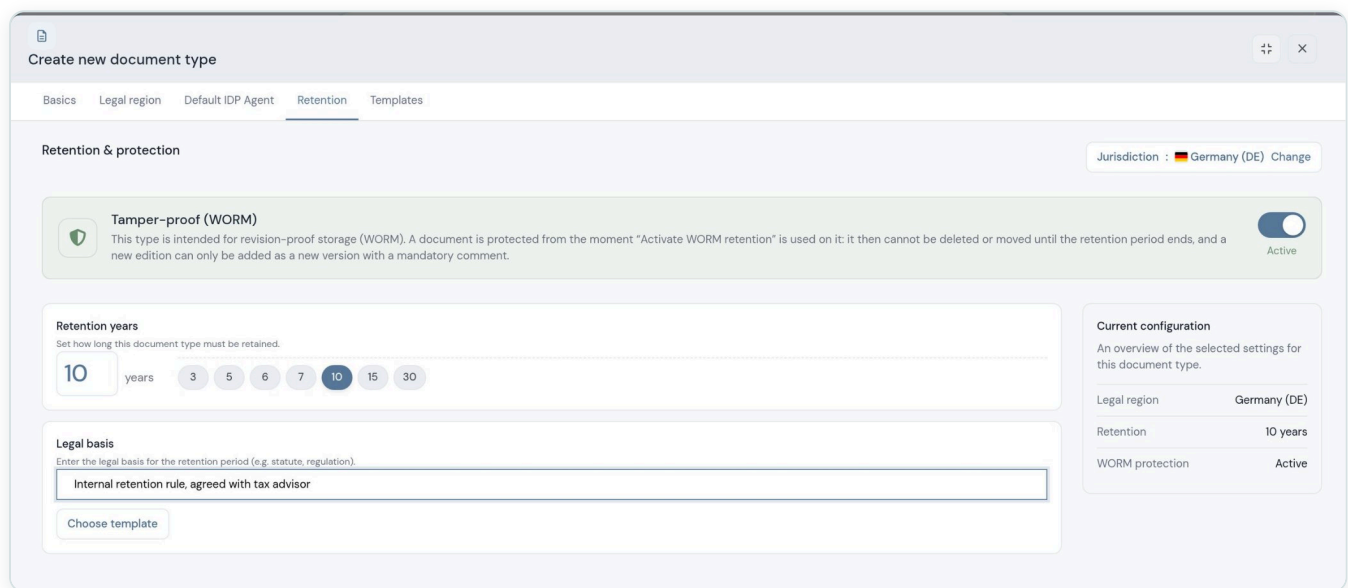
BEFORE YOUR FIRST LOCK

Check the years and legal bases of the types you use with your tax advisor. A document’s retention period comes from its type and is fixed once the document is locked.

06 · YOUR OWN DOCUMENT TYPES WITH A RETENTION PERIOD

Your own type, your period. Create once, use every time.

With **New document type** you create a type that the catalog does not know or that has its own period in your business, for example “Maintenance contract” for the ovens.



- 1 **Retention tab.** Turn on “Tamper-proof (WORM)” and enter retention years and legal basis. The jurisdiction is shown at the top, and “Change” takes you to the Legal region tab.
- 1 **Basics:** a name and an instruction for the AI in English, with typical features and how the type differs from similar ones. The instruction is used in classification.
- 2 **Legal region:** choose the country the type applies to.
- 3 **Retention:** turn on WORM, enter years and legal basis. A type with retention years is saved with WORM switched on.
- 4 **Default IDP Agent:** optionally choose an IDP Agent that runs automatically for this type.
- 5 **Save:** “Create document type”. The type then appears in the catalog and in the selection when you lock a document.

TIP FOR A TRIAL RUN

For tests, create your own type “Archive test run” with one year. With the period starting “Immediately”, a test document then stays locked for one year instead of the full period of a system type. It then carries the type “Archive test run”.

07 · BRINGING IN NEW RECORDS AND OLDER STOCK

New records by scanner. Older ones year by year.

New records come in through [Add document](#) . The import wizard brings in older stock: select the workspace, then [Actions](#) > [Import Documents](#) .

Select import source

2 Files
Review selection

3 Review
Check configuration

4 Import
Start transfer

Check selection, processing and possible conflicts.

Ready for import. 10 · 785.1 KB

10 Files

785.1 KB Total Size

3 Folders

Review result

- File formats are supported
- As in Workspace · AI-DMS Premium

File preview (first 20)

File Name	Size
Rechnung_MG-2023-01188_Grevenbrock.pdf	61.8 KB
Rechnung_MG-2023-02964_Grevenbrock.pdf	62.5 KB
Rechnung_MG-2023-05502_Grevenbrock.pdf	74.5 KB

☒ Automatically skip duplicates (hash-based)
Files with identical SHA-256 content hash that already exist in this Workspace will be skipped. Disable to consciously re-import duplicates.

Target
Archive Backhaus Wendeler

Source
Computer & Network

Files
10 · 785.1 KB

Processing
As in Workspace · AI-DMS Premium

- Review step.** Before the start, the wizard shows files, total size, folders and the "File preview (first 20)". Leave "Automatically skip duplicates (hash-based)" checked.

CHANNEL	HOW IT WORKS	IDEAL FOR
Upload	Add document , File tab	single records
Network scanner	SFTP to folder /inbox, new scans on the Scanner tab	paper records from the office
ZIP import	source Computer & Network, up to 2,000 files per job	past years from the drive
Storage Mount	folder via SFTP, S3 or WebDAV including subfolders	stock on a server or NAS



CHECK THE REPORT

At the end, the report shows how many files were imported, skipped or failed. Compare the numbers with the source folder before you lock a year of records. The SHA-256 check skips files whose content is already in the workspace.

08 · CHECK THE TYPE BEFORE YOU LOCK

Check the type first. Then lock.

During processing, AI-DMS detects the document type, such as invoice or contract, and suggests a name and summary. If no type fits with enough certainty, the document is filed under "Other / Uncategorized".

The screenshot displays the 'Properties' tab of the AI-DMS interface. On the left, a document preview shows a 'Wartungsvertrag Nr. WV-2024-017' from 'STEINHAGEN'. The main panel on the right is titled 'Classification' and includes a 'Status' field with a text input and a 'Document name' field containing 'Maintenance_Contract_WV-2024-017_Steinhagen.pdf'. Below these, a 'Document type' dropdown menu is set to 'Maintenance contract'. A 'Suggestions (click to apply):' section lists the same document name. The top navigation bar includes tabs for Overview, Properties, Data Fields, Storage Paths, Activities, Audit, and Revisions.

- 1 **Properties tab.** Under Classification you see the document type, here your own type "Maintenance contract". To change a wrong type, click the Document Type field.



Why first

The type determines retention period and legal basis. Once a document is locked, document type and retention details are locked too.

Data fields stay open

Values such as invoice number or amount remain editable. Every change appears on the Revisions tab.

Existing documents

Select them and choose the level under **Actions** ›

Agents & workflows › AI-DMS . AI-DMS then detects their type.

09 · LOCKING WITH A PERIOD START

One click on the document. Locked until the period ends.

On the Overview tab, every document without a lock shows the notice “Not revision-secure” with the **Activate WORM retention** button. It opens the form on the Revisions tab.



- 1 The notice on the document. “WORM can be activated for this document.” The button on the right opens the form.

The screenshot shows the "Activate WORM retention" form. On the left, there is a preview of an invoice for "Rechnung MG-2026-04417" with details like "Ofenstraße 12, 12345 Musterstadt" and a table of items. On the right, the form has fields for "Jurisdiction" (set to "Global"), "Document type" (set to "Invoice [INVOICE] [10y]"), "Period start" (radio buttons for "Immediately (day-exact from today)" and "End of year (EoY — common for statutorily bound types)"), and "Period end (calculated)" (set to "12/31/2036 (10 years) · Legal basis: Varies by jurisdiction (set retention to local law)"). At the bottom, there is a green button "Activate WORM retention now (irreversible)" and a "Cancel" button.

- 2 The form. The document type list shows the types of the selected jurisdiction. If the type is not in it, set the jurisdiction to “Global”, where the Invoice type is listed. Below are the period start and “Period end (calculated)” with the legal basis.
- 1 **Confirm the type:** check jurisdiction and document type. The list shows the years of each type, and the type you choose becomes the document’s type.
- 2 **Choose the period start:** “Immediately (day-exact from today)” or “End of year”. For statutorily bound types, the form points to the end of the year.
- 3 **Confirm:** look at the period end, then click “Activate WORM retention now (irreversible)”.

BEFORE YOU CONFIRM

The lock cannot be undone, and it is billed. Choose a type for which “Period end (calculated)” shows a date. The period runs from the moment of locking, so lock records promptly, for example after they are booked.

10 · WHAT A LOCKED DOCUMENT SHOWS

End date and days remaining. Right on the document.

Once a document is locked, the Revisions tab shows the status “Active (WORM)”, the activation date, “Retained until” with the days remaining, and the legal basis.


This document is WORM-protected

Status	 Active (WORM)
Activated on	10/21/2026
Retained until	12/31/2036 (3725 days remaining)
Legal basis	Varies by jurisdiction (set retention to local law)


Compliance Certificate
 PDF with SHA-256 checksum, retention details, audit trail, QR code and public verification link.
 If it is created again within 30 days for unchanged content, the certificate number and verification link stay the same.


Download certificate

- 1 **Status on the document.** Below it is the Compliance Certificate with [Download certificate](#) : a PDF with SHA-256 checksum, retention details, audit trail, QR code and public verification link.

3	Maintenance_Contract_WV-2024-017_Steinhagen.pdf	 Legal Hold
4	Rechnung OS-2026-1183 – Backhaus Wendeler GmbH.pdf	
5	Invoice MG-2026-04417 – Mühle Grevenbrock KG to Backhaus Wendeler GmbH.pdf	 WORM until 12/31/2036

- 2 **In the document list,** here in the Table view, the locked document carries the “WORM until” label with the end date, and a document under legal hold carries the “Legal Hold” label.

Locked

The file stays unchanged. Deleting, moving and renaming are blocked until the period ends, and so are document type and retention details.

Editable

Data fields such as invoice number or amount. Every change appears with old and new value on the Revisions tab.

New edition

Via **Versions** , “Upload new version” with a required note. The new version is locked as well, and the previous one is kept.

11 · PROVING CHANGES, BLOCKING DELETION

Who changed what. And what has to stay.

The Revisions tab shows changes to the document with field, old and new value, user and time. The history covers all documents, whether locked or not.

any retention period.

[Show history](#)

[Place legal hold](#)

All **Field changes** Notes Status WORM Retention

[Refresh](#) [Export](#)

 **Field changed** 10/21/2026 09:35 AM

__document__data__dates__date_due

~~2026-10-23~~

2026-10-30

- 1 **Revisions tab.** The “Field changes” filter, old and new value per entry. “Export” downloads the entries shown as CSV: date, time, action, field, old and new value, user.

Legal hold. During an audit or a legal dispute, choose [Place legal hold](#) on the Revisions tab, enter a reason and optionally a file number. The legal hold blocks deleting, moving and renaming the document and all of its versions until it is released, regardless of any retention period.

“Release” asks for confirmation first, and “Show history” lists placed and released legal holds with date and reason.

Overview Properties Data Fields Storage Paths Activities Audit **Revisions**

Connections

[Legal hold \(deletion lock\)](#)

A legal hold blocks deleting, moving and renaming this document and all of its versions until it is released, regardless of any retention period.

Reason *

Reference No. / File Number (optional)

[Cancel](#) [Place legal hold](#)

[Show history](#)

All **Field changes** Notes Status WORM Retention

[Refresh](#) [Export](#)

- 2 **Place legal hold** with a required reason.

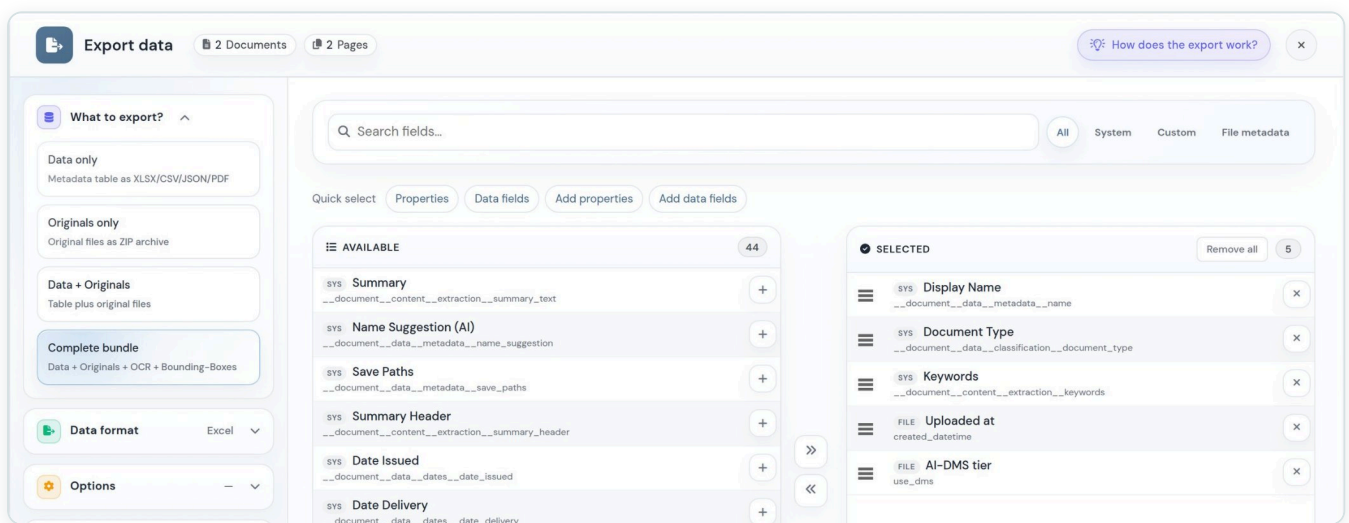
WHO CAN DO THIS

The legal hold section is shown to owners and administrators of your PaperOffice account. Via the API, both placing and releasing a legal hold require the workspace rights “Administrator” and “Delete”.

12 · FINDING RECORDS AND HANDING THEM TO THE AUDIT

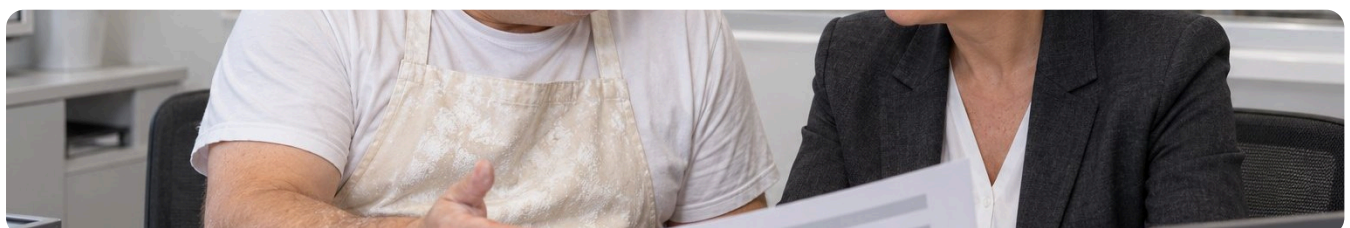
Filter by type. Hand over one bundle.

Search finds documents by full text, text from scans and meaning. At the top, under **Search** › **Filters** › **Document type**, narrow down by type; the date range filters by the date the documents were added. Select the documents and open **Actions** › **Share & export** › **Export data**.



- Four modes.** Data only (table as XLSX, CSV, JSON or PDF), Originals only, Data + Originals and Complete bundle with data, originals, OCR text and bounding boxes.

CHANNEL	HOW IT WORKS	IDEAL FOR
Export	Complete bundle as a ZIP from the selected documents	records for the audit
Read access	user group with the "View + Download" right on the workspace	auditors who look things up themselves
REST API	documents-export, document-revisions, document-legal-hold, document-retention-activate	connecting your own systems
MCP	po_documents_audit_trail_get, po_documents_legal_holds_create	AI assistants with your rights



Seven questions before your first year of records.



Does this meet GoBD requirements?

PaperOffice provides the building blocks: retention period and legal basis per type, WORM lock, change history, legal hold, certificate and export. Whether your process as a whole is sufficient is for your tax advisor to judge, based on your process documentation.

When does the retention period start?

When you lock the document, either immediately to the day or at the end of the year. The years come from the document type. So lock records promptly, for example in the year they are booked.

Can a locked document still be changed?

The file stays unchanged. Data fields remain editable, every change appears on the Revisions tab, and a new edition is added as a new version. The lock itself cannot be undone.

Who can lock documents?

Anyone with write access to the workspace. In the app, legal holds are placed by owners and administrators of your account.

How does our older stock get in?

As a ZIP or from a Storage Mount, up to 2,000 files per job. A SHA-256 check skips duplicates, AI-DMS detects the type, and the report shows what was imported.

What does the tax audit receive?

An export of the selected documents, for example filtered by type, as a table or as a Complete bundle with originals and OCR text. Or read access through a user group with the "View + Download" right.

What does it cost?

Billing is based on usage: locking and compliance certificate per action, processing depending on the AI-DMS level. Prices are on the pricing page: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Run through one archive year.

Six invented German files from Backhaus Wendeler GmbH show the whole path: from your own document type to the export for the audit.

ARCHIVING TEST PACKAGE

Six files and a guide (README.txt)

Rechnung_MG-2026-04417_Grevenbrock.pdf Invoice from a mill for flour
 Rechnung_OS-2026-1183_Steinhagen.pdf Invoice for oven maintenance
 Wartungsvertrag_Ofenanlage_Steinhagen.pdf Maintenance contract, two pages
 Kontoauszug_2026-10_Musterbank.pdf Bank statement for October
 Foto_Kassenbeleg_Tankstelle.jpg Phone photo of a till receipt
 Altbestand_2023.zip ten records from 2023
paperoffice.ai/downloads/paperoffice-ai-test-package-archiving.zip



- 1 Workspace and types:** at app.paperoffice.ai, create a workspace "Archive test" of type Business, plus your own types "Maintenance contract" and "Archive test run" with one year.
- 2 Bring in:** the five single files via "Add document", the ZIP via **Actions** > **Import Documents**. Then import the ZIP a second time.
- 3 Check the type:** on the Properties tab, set the contract to "Maintenance contract" if needed.
- 4 Lock:** open the flour invoice, select the Invoice type in the form (if missing, jurisdiction "Global") and see its period end, then confirm "Archive test run" with "Immediately". The invoice then carries this type.
- 5 Prove and export:** change a data field in the Steinhagen invoice, open the Revisions tab, place a legal hold on the contract, filter by type, export a Complete bundle.

FILE	WHAT YOU TRY WITH IT
Grevenbrock invoice	form with period start, end date on the document, certificate
Steinhagen invoice	change a data field, entry on the Revisions tab, CSV export
Maintenance contract	your own type, type on the Properties tab, legal hold with a reason
Bank statement and till receipt	filter by document type, search in the text of a photo
Altbestand_2023.zip	import with report; second import: all files already present

All companies, names, addresses, bank details and amounts in the test package are fictional. Locked test documents stay in the workspace until their period ends. The cost of the test is shown on the pricing page: paperoffice.ai/en/pricing.

15 · READ MORE

Every building block in detail. As a PDF to pass on.

The data sheets describe the modules this guide uses, with features, click paths and technical details. The short guide sums up the topic on eight pages.

SHORT GUIDE

Archiving: retention on the document type, WORM lock, evidence and export, on eight pages to share with your team.

paperoffice.ai/downloads/paperoffice-ai-short-guide-prozess-archivierung.pdf

DATA SHEETS

DATA SHEET

Classification: document type and retention per type

paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf

DATA SHEET

Workspaces: types, recycle bin and rights

paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

DATA SHEET

Import & Migration: ZIP, Storage Mount, report

paperoffice.ai/downloads/paperoffice-ai-datasheet-import-migration.pdf

DATA SHEET

Smart Search: full text, scans, meaning

paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

DATA SHEET

Network Scanner: scans via SFTP into the workspace

paperoffice.ai/downloads/paperoffice-ai-datasheet-integration-network-scanner.pdf

DATA SHEET

Audit Center: review findings with evidence

paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-center.pdf



16 · YOUR FIRST YEAR OF RECORDS IN FIVE DAYS

Start with one year. Then add each further one.

To get started, all you need is one year of records and a meeting with your tax advisor.

1

Day 1 · Retention periods

Agree with your tax advisor which document types you use and which periods and legal bases apply.

2

Day 2 · Workspace and types

Create a Business workspace, check the system types in the catalog, create your own types with their period.

3

Day 3 · Intake

Set up the network scanner and decide how new records come in.

4

Day 4 · Older stock

Import one year of records, compare the report with the source folder, spot-check the types.

5

Day 5 · Locking

Set the rule for when and with which period start documents are locked, and decide who places legal holds and exports.

MEASURE THESE FOUR VALUES

Locked

Share of a year's records with the status "Active (WORM)"

Type corrected

Documents whose type was changed before locking

Import report

imported, skipped and failed files per year of records

Time to export

Time from the auditor's request to the finished bundle

Record the process in your process documentation. It describes how your business archives with PaperOffice.



17 · CHECKLIST AND START

Before you clear the basement.

- ☐ The periods of your key document types are agreed with your tax advisor.
- ☐ For each of these types, years, jurisdiction and legal basis are set under Document AI › Document Types.
- ☐ Your own types, such as the maintenance contract, are set up with their period.
- ☐ The archive sits in a workspace of type Business or Compliance in the PaperOffice Cloud.
- ☐ You have decided when a document gets locked and with which period start.
- ☐ The document type is checked before locking.
- ☐ During an audit or a legal dispute, an administrator places a legal hold with a reason.
- ☐ Auditors get the "View + Download" right through a user group.
- ☐ Older stock has been imported, and the report has been compared with the source folder.

GET STARTED NOW

Create an account, set up a Business workspace, check the period of a document type and upload the test package. Billing is based on usage.

app.paperoffice.ai**THE SOLUTION**

Archiving at paperoffice.ai: retention per document type, locking and evidence at a glance.

paperoffice.ai/l/loesungen-prozess-archivierung

**QUESTIONS ABOUT THIS GUIDE?**

Contact us if you have questions about the setup or your archive.

paperoffice.ai/contact

As of October 2026. The app screenshots come from a test account, and the photos are AI-generated. All examples, companies, names and values in this guide are fictional. PaperOffice, paperoffice.ai.