

Open, key in and
pass on every
invoice?

**From now on,
every invoice
arrives read and
ready for approval.**

Inbox, scanner, upload and e-invoice. This guide shows step by step how PaperOffice collects invoices in one Workspace, reads header data and line items, matches them against purchase order and delivery note and hands them to your team as a review task.



TRY IT YOURSELF IN 45 MINUTES

One procurement case in seven files: purchase order, delivery note, an invoice with a higher unit price, an e-invoice, an invoice that arrived twice and one with new bank details. With a test package to follow along.

WHY THIS GUIDE

The time isn't spent reading. It's spent searching and comparing.

Reading an invoice takes seconds. Before it is approved, someone looks for the purchase order, asks the warehouse for the delivery note and carries the invoice down the hallway.



In many accounting teams, invoice review is mostly searching: Which purchase order belongs to it, has everything been delivered, is the price right, has this invoice arrived before? It takes time, and it is the same every month.

This guide shows how PaperOffice takes over this part: one Workspace for all inputs, data fields with their source location, matching against purchase order and delivery note, and a review task for your team. With the test package, you can try it yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice

WHO THIS IS FOR

Accounts payable

You capture and review incoming invoices and want to spend less time keying in and searching.

Purchasing

You place orders, receive deliveries and resolve variances with suppliers.

Head of finance

You approve and want to know which invoices stand out and why.

WHAT YOU CAN DO AFTERWARD

Set up an invoice Workspace, connect inbox and scanner, have data fields and e-invoices read, match invoices against purchase order and delivery note, spot duplicates and new bank details, and create review tasks.

OVERVIEW

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AT A GLANCE

- An "Incoming Invoices" Workspace collects the invoice inbox, scanner, upload and smartphone.
- From AI-DMS Premium, sender, amounts and PO reference are available as data fields, each value with its source location. PaperOffice reads e-invoices from the XML.
- Three IDP Agents from the catalog read the line items of purchase order, delivery note and invoice. Matching shows where invoice, purchase order and delivery note differ.
- Possible duplicates show on the document. AI-DMS Ultra checks bank details and VAT ID and holds what stands out in quarantine.
- A HITL Agent creates the review task, for several people from your amount. The data goes to your accounting via export, REST API or webhook.

01 · MONDAY IN ACCOUNTS PAYABLE

One inbox, one stack. And one invoice doesn't match.

Monday, 8:30 a.m. Malte Rohwer, accounts payable clerk at Wohnwerk Elmendorf GmbH, a maker of upholstered furniture, opens the invoice inbox. Friday's paper mail is on his desk.



Stoffweberei Lindqvist charges 26.40 per meter for the velour ST-4410. The order said 23.90. Whether everything was delivered is on the delivery note, and that is in the warehouse.

The invoice from Beschlagtechnik Kornmeyer came by letter and by email. Spedition Ahlgrimm writes that it has a new bank account. And Holzhandel Rautenberg sends an e-invoice in ZUGFeRD format.

Approval has to come from head of finance Sabine Krolow, who will be at the furniture fair from Wednesday.

THE REAL HURDLE

Only someone who has invoice, purchase order and delivery note side by side can review. Until then, most of the time goes into searching, keying in and following up.

02 · WHAT HOLDS INVOICES UP

Four time sinks. Each one small on its own.

Hardly any invoice is difficult. The time goes into the many ways invoices arrive and into finding their purchase order and delivery note.

Many inputs

Invoices arrive by mail, at personal inboxes, as PDFs and as e-invoices. Whoever processes them first has to gather them.

Keying in

Supplier, number, amount and PO number are copied by hand. Transposed digits slip through.

Matching by hand

Whether quantity and price are right only shows when comparing with purchase order and delivery note. Both sit elsewhere.

Approval down the hallway

The invoice travels to approval and back. Whoever is out holds up the run.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Many inputs	Inbox, scanner, upload and smartphone deliver into one Workspace	Invoice as a letter and as an email
Keying in	Data fields with source location, e-invoices from the XML	ZUGFeRD invoice from Rautenberg
Matching by hand	Matching via the PO reference, variance per line item	Unit price 26.40 instead of 23.90
Approval down the hallway	HITL Agent with review task and amount rule	Lindqvist invoice as a task

All files in the test package are made up. What you should see with them in the app is on page 17.

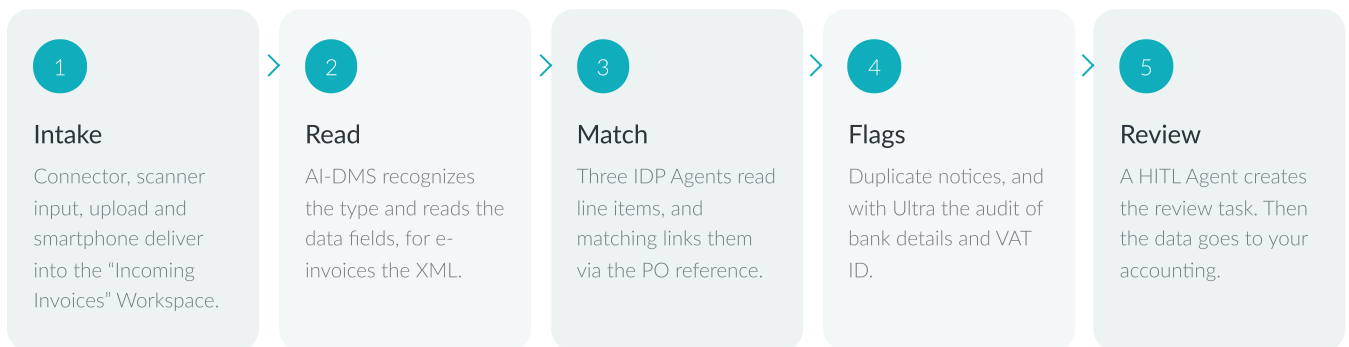
WHAT STAYS WITH YOU

The expert review, approval, posting and payment. PaperOffice reads, matches and shows what stands out.

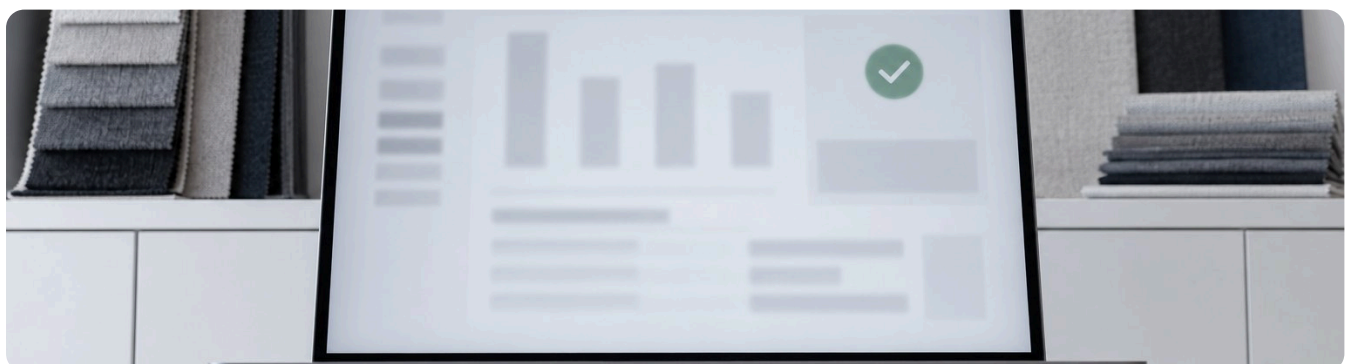
03 · THE PROCESS AT A GLANCE

Five stations. From the inbox to handover.

Every invoice follows the same path, whether it arrives by email, as a letter or as an e-invoice.



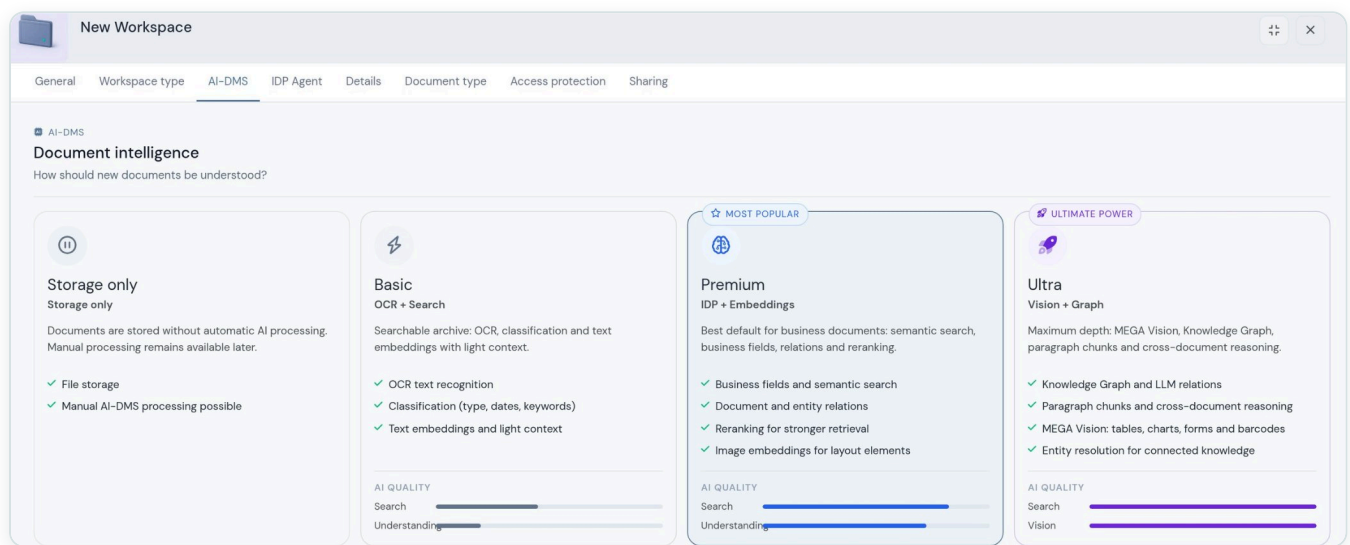
STATION	WHAT PAPEROFFICE DOES	WHAT YOU DECIDE
Intake	fetches emails, scans and uploads into the Workspace	which inboxes and devices are connected
Read	type, sender, amounts, PO reference, XML fields	the AI-DMS tier of the Workspace
Match	checks documents, amounts, quantities and prices	PO and item numbers from your suppliers
Flags	shows duplicates, findings and quarantine	quarantine threshold and who has write access in the Workspace
Review	creates tasks, for several people from your amount	groups, amount limits and handover path



04 · ONE WORKSPACE FOR INCOMING INVOICES

One Workspace for all invoices. With the right reading depth.

Under [Document AI](#) > [Workspaces](#), click [Create New Workspace](#). On the “General” tab, enter the name “Incoming Invoices” and the type “Accounting”, choose Business on the “Workspace type” tab and the tier on the “AI-DMS” tab.



- The tier for new documents.** Premium reads sender, amounts and PO reference and flags possible duplicates. Ultra also checks every new document in the audit. You can change the tier later under [Edit Workspace](#) > [AI-DMS](#).

One place for the case

Purchase orders and delivery notes belong in the same Workspace as the invoices. That is where matching finds them.

Workspace type Business

Business adds a trash, details, access protection and external sharing of the Workspace.

Premium or Ultra

Premium for data fields and duplicates. Ultra when every document should also be checked for bank details and VAT ID.

GOOD TO KNOW

Attachments from the invoice inbox run with this Workspace's tier. You can upgrade individual invoices later: select them, then [Actions](#) > [Agents & workflows](#) > [AI-DMS](#) and choose the tier.

05 · ALL INPUTS INTO ONE WORKSPACE

Inbox, scanner, upload. Everything lands in one place.

For the invoice inbox, create a Storage Mount “Email (IMAP)” under [Document AI](#) > [Storage Mounts](#) with the purpose “Use as import source”. A connector then fetches new emails including attachments.


Email (IMAP) Connection
Connect an IMAP mailbox (Exchange, Gmail, any mail server) to automatically process emails and attachments.

IMAP Server *

Port

Username / Email *

Password *

☒ Use SSL/TLS (recommended)
☐ Allow self-signed certificate
Only for your own mail server that you trust. PaperOffice then does not verify the server's TLS certificate.

Default Folder

The IMAP folder used as the base. Default: INBOX.

- 1 **Enter the mailbox.** IMAP server, port, username and default folder, such as INBOX; SSL/TLS stays on. Then, under [Document AI](#) > [Connectors](#), “Create connector” and on the “Import source & target” tab choose this mount and the target Workspace “Incoming Invoices”. Leave “Scan unread emails only” and “Mark as read after import” on; the inbox is checked on a schedule, from every 5 minutes.

PATH	HOW TO SET IT UP	IDEAL FOR
Inbox	Storage Mount “Email (IMAP)” and a connector, as above	invoices by email
Scanner	Storage Mount “Provide as Scanner Endpoint”, on the device SFTP to sftp.paperoffice.ai, port 2022, folder /inbox, plus a connector	paper mail
Upload	Add document , “File” tab, emails as .eml files too	single invoices
Smartphone	Add document , “Mobile devices” tab, scan the QR code	receipts on the go

Split batches

If the mailroom scans several invoices as one PDF, the Split Agent separates the batch: select it, then [Actions](#) > [Agents & workflows](#) > [Split](#).



06 · WHAT PAPEROFFICE READS FROM EVERY INVOICE

Every field with its source. Review instead of re-typing.

Classification recognizes invoice, credit note, delivery note, purchase order and payment reminder. From AI-DMS Premium, publisher, amounts and PO reference appear on the **Data Fields** tab.

The screenshot displays the PaperOffice interface with two main panels. The left panel shows a scanned invoice from Lindqvist, and the right panel shows the extracted data fields.

Invoice Details (Left Panel):

LINDQVIST
Stoffweberei GmbH

Stoffweberei Lindqvist GmbH · Weberstraße 21 · 48599 Musterhausen
Wohnwerk Elmendorf GmbH
Kreditorenbuchhaltung
Gewerberg 7
32760 Musterstadt

Rechnungsnummer: SL-2026-1187
Rechnungsdatum: 14.10.2026
Lieferdatum: 12.10.2026
Kundennummer: 20417
Zahlungstitel: 30 Tage netto

Rechnung SL-2026-1187
Ihre Bestellung / Bestellreferenz: PO-2026-0412 · Lieferschein LS-88213 vom 12.10.2026

Sehr geehrte Damen und Herren,
für die Lieferung vom 12.10.2026 berechnen wir Ihnen:

Pos.	Art.-Nr.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	ST-4410	Velours Satbei	120	m	26,40 EUR	3.168,00 EUR
2	ST-4415	Bouté Sand	80	m	27,50 EUR	2.200,00 EUR
3	ST-9002	Vliesunterlage	200	m	3,20 EUR	640,00 EUR
					Nettobetrag	6.008,00 EUR
					Umsatzsteuer 19 %	1.141,52 EUR
					Rechnungsbetrag	7.149,52 EUR

Zahlbar innerhalb von 30 Tagen ab Rechnungsdatum ohne Abzug.
Mit freundlichen Grüßen
Stoffweberei Lindqvist GmbH

Data Fields (Right Panel):

- Invoice date: 14.10.2026
- Invoice number: SL-2026-1187
- Net amount: 6.008,00 EUR
- Reference Number: PO-2026-0412
- Supplier name: Stoffweberei Lindqvist GmbH
- Tax amount: 1.141,52 EUR
- Total amount: 7.149,52 EUR

Line Items
3 rows · 7 Columns
Copy for Excel

- The Lindqvist invoice from the test package. On the left the invoice, on the right the values read, here filtered to the agent "Invoice (3-Way Matching)" from chapter 08: the PO reference PO-2026-0412 in the "Reference Number" field, supplier name Stoffweberei Lindqvist GmbH and the total amount. Next to each value is the snippet it was read from.

Name and summary

Every invoice gets a type, a descriptive name and a summary, plus suggested storage paths.

Correct the type

If the type is wrong, change it on the "Properties" tab, for example when a credit note was recognized as an invoice.

Line items as a table

An IDP Agent reads line items (chapter 08). "Copy for Excel" above the table copies all rows.

07 · E-INVOICES: DATA FROM THE XML

ZUGFeRD, Factur-X, XRechnung. Read from the data record.

From ZUGFeRD and Factur-X, PaperOffice reads the embedded XML, and XRechnung and other UBL or CII files directly. It takes number, date, amounts and supplier from the data record, at every AI-DMS tier.

RAUTENBERG
Holzhandel KG

Holzhandel Rautenberg KG · Sägewerkstraße 3 · 37603 Mutenwald

Wohnwerk Elmendorf GmbH
Kreditorenbuchhaltung
Gewerbering 7
32760 Musterstadt

Rechnungsnummer: RG-2026-30418
Rechnungsdatum: 13.10.2026
Lieferdatum: 12.10.2026
Kundennummer: K7730
Fällig am: 12.11.2026

Rechnung RG-2026-30418

Sehr geehrte Damen und Herren,
wir berechnen Ihnen die Lieferung vom 12.10.2026:

Pos.	Art.-Nr.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	HR-2201	Buchenholz-Gestell Sessel „Ella“	24	Stück	48,50 EUR	1.164,00 EUR
2	HR-2210	Armlehnen-Set Buche	24	Stück	12,80 EUR	307,20 EUR
Nettobetrag						1.471,20 EUR
Umsatzsteuer 19 %						279,53 EUR
Rechnungsbetrag						1.750,73 EUR

Zahlbar bis 12.11.2026 ohne Abzug.

Mit freundlichen Grüßen
Henrike Rautenberg
Holzhandel Rautenberg KG

Diese Rechnung ist eine E-Rechnung im Format ZUGFeRD, Profil EN 16931. Die Rechnungsdaten sind als Datei factur-x.xml in dieses PDF eingebettet.

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

Connections

E-invoice protocol
E-invoice valid
The XML satisfies the EN 16931 core rules. A successful parse alone would not be sufficient.
Download protocol

Validation module: po_en16931_core_v1
Checked at: Oct 21, 2026, 9:41 AM
XML SHA-256: c4c6c0329587...
Failed rules: 0

Only with AI-DMS Ultra
This document receives a complete security assessment

Fraud and risk scores
Scale from 1 to 10 with reasoning, not just a status dot.

Compliance signals
Detects personal, bank, tax and health data in this document.

Figures and plausibility

- 1 The e-invoice RG-2026-30418 from the test package. The **Audit** tab shows the e-invoice protocol: “E-invoice valid”, the XML satisfies the EN 16931 core rules. Below it the validation module, the time of the check and the XML checksum, plus “Download protocol”.

Invalid means: review

If the XML does not meet the core rules, it says “E-invoice invalid — review required” with the failed rules, such as “The invoice number (BT-1) is missing.”

Same path as paper

An e-invoice goes through the same duplicate check, the same matching and the same review task as an invoice from the scanner.

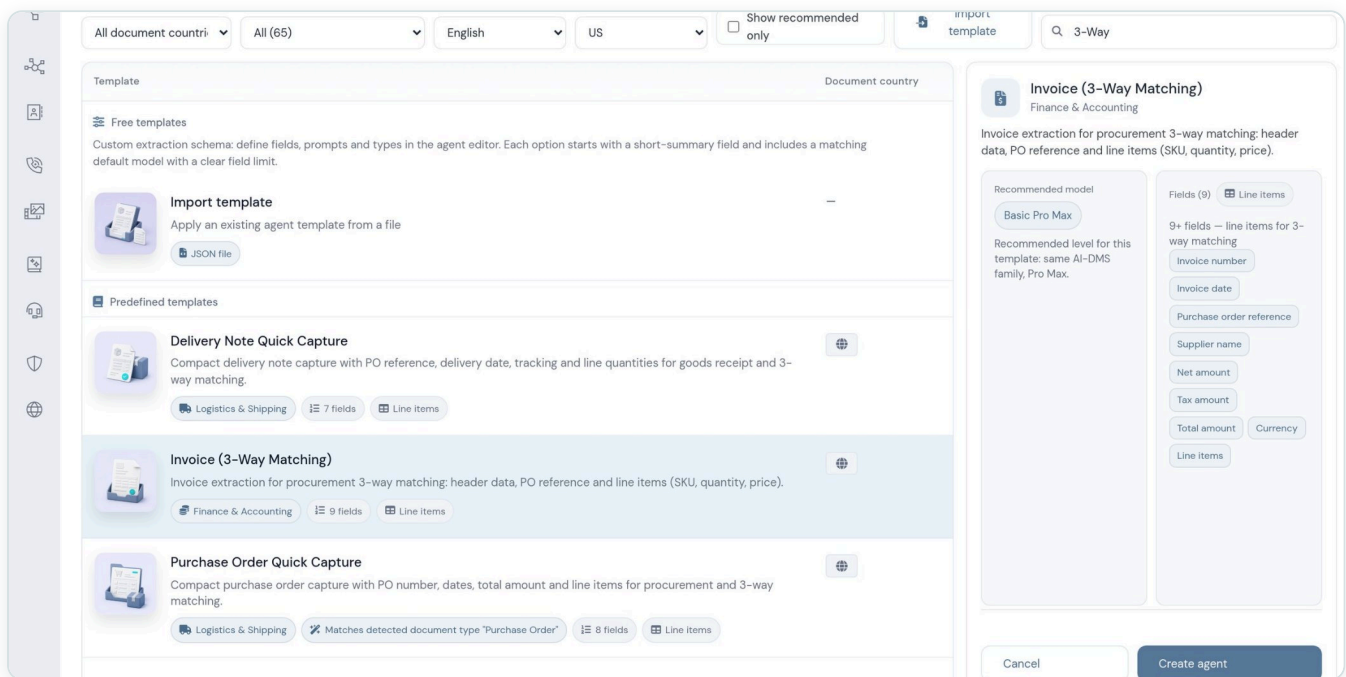
GOOD TO KNOW

PaperOffice checks the core rules with its own validation module. You can download the protocol for each invoice and add it to your records.

08 · READING LINE ITEMS: THREE PROCUREMENT AGENTS

Three agents, one PO reference. Created once.

For matching, PaperOffice needs the line items of purchase order, delivery note and invoice. Select a purchase order, then **Actions** > **Agents & workflows** > **IDP**, “Create new agent”.



- 1 **Three templates in the catalog.** The search “3-Way” shows “Purchase Order Quick Capture”, “Delivery Note Quick Capture” and “Invoice (3-Way Matching)”, all with line items. The invoice template also reads the “Purchase order reference”. For each template, “Create agent”, then “Save and close” in the editor.
- 1 **Apply automatically:** under **Document AI** > **Document Types**, open the “Invoice” type, go to the “Default IDP Agent” tab and select “Invoice (3-Way Matching)”. Do the same for “Delivery Note” with “Delivery Note Quick Capture” and “Purchase Order” with “Purchase Order Quick Capture”.
- 2 **From then on it runs along:** when AI-DMS recognizes one of these types, PaperOffice queues the agent automatically.
- 3 **Catch up individually:** for earlier documents, click “Apply Agent” on the “Data Fields” tab.

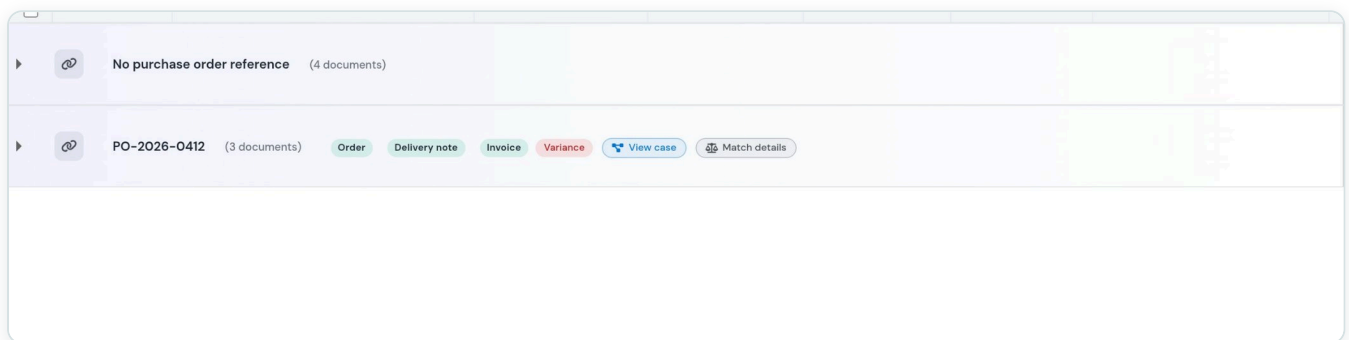
TIP FROM PRACTICE

The PO reference belongs on every document. Matching links documents with the same PO reference in the Workspace, pairs line items by item number and compares quantities as numbers. Ask suppliers for your PO and item numbers and quantities in your unit.

09 · MATCHING AGAINST PURCHASE ORDER AND DELIVERY NOTE

26.40 instead of 23.90. The variance shows on the invoice.

If the three documents carry the same PO reference in the same Workspace, PaperOffice matches the case after every processing run, even if the delivery note arrives later.



- 1 **Cases in the list.** Under **Options** > **Configure view**, set "Group by" to "Purchase order reference (PO)". Group PO-2026-0412 shows order, delivery note and invoice and the result "Variance". "Match details" opens the 3-way match, "View case" the documents.

Stoffweberei Lindqvist GmbH · Weberstraße 21 · 48599 Musterhausen

Wohnwerk Elmendorf GmbH
Kreditorenbuchhaltung
Gewerberg 7
32760 Musterstadt

Rechnungsnummer: SL-2026-1187
Rechnungsdatum: 14.10.2026
Lieferdatum: 12.10.2026
Kundennummer: 20417
Zahlungsziel: 30 Tage netto

Rechnung SL-2026-1187

Ihre Bestellung / Bestellreferenz: **PO-2026-0412** · Lieferschein LS-88213 vom 12.10.2026

Sehr geehrte Damen und Herren,

für die Lieferung vom 12.10.2026 berechnen wir Ihnen:

Pos.	Art.-Nr.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	ST-4410	Velours Salbei	120	m	26,40 EUR	3.168,00 EUR
2	ST-4415	Bouclé Sand	80	m	27,50 EUR	2.200,00 EUR
3	ST-9002	Vliesunterlage	200	m	3,20 EUR	640,00 EUR
Nettobetrag						6.008,00 EUR
Umsatzsteuer 19 %						1.141,52 EUR
Rechnungsbetrag						7.149,52 EUR

Zahlbar innerhalb von 30 Tagen ab Rechnungsdatum ohne Abzug.

Mit freundlichen Grüßen
Stoffweberei Lindqvist GmbH

3-way match
Variance
Review required

Purchase order reference: PO-2026-0412
Checked at: Oct 21, 2026, 9:52 AM

Open purchase order Open delivery note

Checks

OK Order found

OK Delivery note found

Not met Amounts match the order
PO total 5,708.00 Invoice total 6,008.00

Not met Quantities and prices per item match

Item	Order Quantity	Delivery note Quantity	Invoice Quantity
ST-4410	120	120	120
Unit price differs from order price		Price 23.90	Price 26.40

- 2 **On the invoice's Audit tab.** Four checks: "Order found", "Delivery note found", "Amounts match the order" and "Quantities and prices per item match". The last two are not met here; for ST-4410 it says "Unit price differs from order price". The buttons open purchase order and delivery note.

10 · DUPLICATES AND SUSPICIOUS BANK DETAILS

The same invoice twice? A new account? It stands out.

From AI-DMS Premium, PaperOffice looks for earlier documents with the same content or document number from the same issuer. With Ultra, the audit also checks bank details and VAT ID.

KORNMEYER
Beslagtechnik GmbH

Beschlagtechnik Kornmeyer GmbH · Industrieweg 44 · 58089 Musterberg

Wohnwerk Elmendorf GmbH
Kreditorenbuchhaltung
Gewerbering 7
32760 Musterstadt

Rechnungsnummer: KB-26-5531
Rechnungsdatum: 08.10.2026
Lieferdatum: 08.10.2026
Kundennummer: 61208
Fällig am: 23.10.2026

Rechnung KB-26-5531

Sehr geehrte Damen und Herren,

für die Lieferung vom 08.10.2026 berechnen wir Ihnen:

Pos.	Art.-Nr.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	MF-120	Möbelfuß Metall schwarz	400	Stück	2,15 EUR	860,00 EUR

Possible Duplicate This document likely already exists: "Scan_Rechnung_KB-26-5531_Kornmeyer.pdf" in "Incoming Invoices" from 10/21/2026.

Same Document Number Same Issuer Same Amount

Open Original Not a duplicate

Overview Properties Data Fields Storage Paths Activities Audit Revisions

Connections

Not revision-secure
WORM can be activated for this document.

Activate WORM retention

Invoice KB-26-5531 Beslagtechnik Kornmeyer GmbH.pdf

Invoice KB-26-5531 from Beslagtechnik Kornmeyer GmbH

- 1 The Kornmeyer invoice arrived twice. Below the action bar, "Possible Duplicate" links to the earlier document and names the reasons, such as "Same Document Number". "Not a duplicate" hides a false alarm.

Speidition Ahlgrimm & Söhne GmbH · Hafenstraße 9 · 28197 Musterhafen

Wohnwerk Elmendorf GmbH
Kreditorenbuchhaltung
Gewerbering 7
32760 Musterstadt

Rechnungsnummer: SA-2026-0977
Rechnungsdatum: 15.10.2026
Leistungszeitraum: 07.10.-10.10.2026
Kundennummer: 3305
Fällig am: 29.10.2026

Rechnung SA-2026-0977

Sehr geehrte Damen und Herren,

für die Transporte vom 07.10. bis 10.10.2026 berechnen wir Ihnen:

Pos.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	Transport Polstergestelle, 10ur Musterwald - Musterstadt:	3	Touren	420,00 EUR	1.260,00 EUR
				Nettobetrag	1.260,00 EUR
				Umsatzsteuer 19 %	239,40 EUR
				Rechnungsbetrag	1.499,40 EUR

Wichtig: Unsere Bankverbindung hat sich geändert. Bitte überweisen Sie ab sofort ausschließlich auf unser neues Konto: **IBAN DE02 1203 0000 0000 2020 51**. Das bisherige Konto wird aufgelöst.

Zahlbar bis 29.10.2026 ohne Abzug.

Mit freundlichen Grüßen
Speidition Ahlgrimm & Söhne GmbH
Buchhaltung

Document in security quarantine

Editing, moving, downloading, and deleting are blocked. In the Audit tab, you can review findings, create tasks, and release the quarantine.

Severity 9 · threshold 7 · since Oct 21, 2026, 9:50 AM

Release from quarantine

AUDIT CONTROL CENTER

Security quarantine active

Complete AI security assessment for this document

AUDIT ENGINE
AI-DMS Ultra

LAST AUDIT RUN
Oct 21, 2026, 9:51 AM

PDF report

PDF incl. origi

FINDINGS
3

REVIEW OPEN
3

CONTROLS
12

MAX. SEVERITY
9

FRAUD RISK ANALYSIS
9/10
Critical security signals

RISK ASSESSMENT
Not applicable

- 2 The Ahlgrimm invoice announces a new account. The audit reports a fraud risk of 9 out of 10 and explains it with the notice of changed bank details. From severity 7, the default, the document goes into security quarantine until someone chooses "Release from quarantine" on the Audit tab. "Approve" in a review task does not lift the quarantine. It flags the made-up VAT ID as "formally invalid".

Call back first

Call the supplier at the known number. "Mark as reviewed" records who reviewed it and when.

Set the threshold

Under Organization Settings

Document Audit Quarantine, you set the severity from which quarantine applies.

11 · REVIEW TASK AND APPROVAL

Every invoice as a task. Two reviewers from your amount.

Under **Workflow AI** > **HITL Agents**, use “New HITL Agent” to set when an invoice goes to review and who reviews it. Review tasks are included from the Professional plan.

- 1 Trigger and review:** on the “Trigger” tab, document type “Invoice”, Workspace “Incoming Invoices” and a trigger rule, for example of rule type “Always”. On the “Review” tab, the instructions for the reviewer.
- 2 Assignment:** on the “Assignment” tab, choose a group with at least one active member and use the “Amount rule” to set the amount from which more people review.
- 3 Decide:** under **Workflow AI** > **Human In The Loop Tasks**, “Approve” or “Reject”.

Amount rule

From the selected amount on, more people review. If the amount is missing or the currency differs, two people always review. Applies only when assigned to a group. Applies only to invoices, receipts and credit notes. For other document types, the number of reviews stays unchanged.

☒ Enabled

Amount field

__document__data__financial__total_amount

Currency

EUR

From amount

5000

Reviews required

2

[+ Add rule](#)

- 1 Amount rule.** From 5,000, two people review. If the amount is missing or the currency differs, two always review. The rule applies to invoices, receipts and credit notes when the task is assigned to a group.

Kreditorenbuchhaltung
Gewerbering 7
32760 Musterstadt

Rechnungsnummer SL-2026-1187
Rechnungsdatum 14.10.2026
Lieferdatum 12.10.2026
Kundennummer 20417
Zahlungsziel 30 Tage netto

Rechnung SL-2026-1187

Ihre Bestellung / Bestellreferenz: PO-2026-0412 · Lieferschein LS-88213 vom 12.10.2026

Sehr geehrte Damen und Herren,

für die Lieferung vom 12.10.2026 berechnen wir Ihnen:

Pos.	Art.-Nr.	Bezeichnung	Menge	Einheit	Einzelpreis	Betrag
1	ST-4410	Velours Salbei	120	m	26,40 EUR	3.168,00 EUR
2	ST-4415	Bouclé Sand	80	m	27,50 EUR	2.200,00 EUR
3	ST-9002	Vliesunterlage	200	m	3,20 EUR	640,00 EUR
Nettobetrag						6.008,00 EUR

Consensus 0 / 2 [Blind review](#)

No review fields configured
This review queue has no fields or checkpoints defined. Please update the queue configuration so reviewers receive a clear task.
[Edit queue in HITL config](#)

☐ Document fully reviewed and ready for decision

DECISION
Additional details are requested after clicking an action.

☒ **Approve**
Approve review · continue workflow

☐ **Reject**
Reject review · comment recommended

MORE ACTIONS

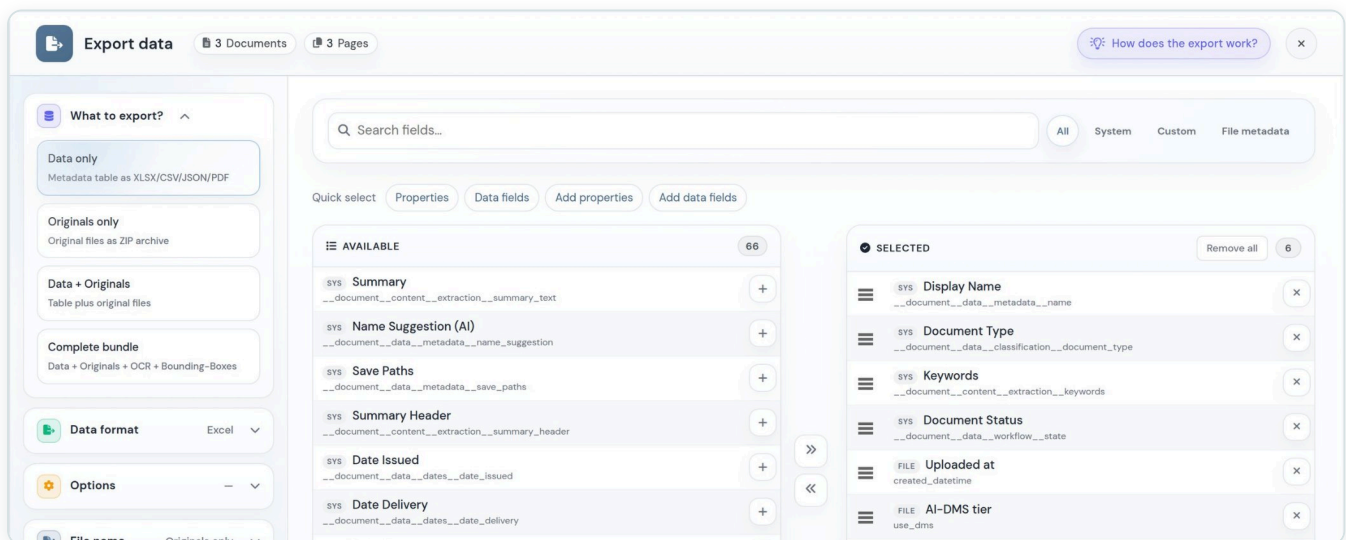
- 2 The task for the Lindqvist invoice.** The team sees the document; “Consensus 0 / 2” shows the two reviews from the amount rule. The decision is “Approve” or “Reject”. Without fields on the HITL Agent’s “Review” tab, the team checks the document itself.

12 · HANDOVER TO ACCOUNTING

Posting happens on your side. The data arrives ready.

Posting and payment happen in your accounting system. PaperOffice delivers invoices and the data read to the software your accounting team works with.

PATH	HOW IT WORKS	IDEAL FOR
Export data	Actions › Share & export › “Export data”, mode “Data only”	lists, manual reconciliation
Copy for Excel	button above tables such as the line items	single invoices
REST API	fetch fields with a key from API & Developer › API Keys	connecting your accounting
Webhook	“document.processed” notification with the fields read	automatic handover



- 1 **Export data.** For the selected invoices, choose the “Data only” mode: the metadata table as XLSX, CSV, JSON or PDF. You can view and copy the API key under API Keys at any time.

HAND OVER AFTER REVIEW?

The “document.processed” webhook reports an invoice as soon as it has been read. If handover should wait for approval, fetch the fields afterward via the REST API. Our practical guide “n8n + PaperOffice” shows how API and webhook work together.

Seven questions before the first invoice.



Where are entries posted and payments made?

In your accounting system. PaperOffice reads, matches, shows what stands out and creates review tasks. The data comes via export, REST API or webhook.

Are e-invoices processed too?

Yes. From ZUGFeRD and Factur-X, PaperOffice reads the embedded XML, and XRechnung and other UBL or CII files directly. The e-invoice protocol on the Audit tab shows whether the EN 16931 core rules are met.

What does matching need?

Purchase order, delivery note and invoice in the same Workspace with the same PO reference, plus the line items from the three 3-way agents for purchase order, delivery note and invoice and item numbers on all documents.

What if the delivery note arrives later?

Then PaperOffice matches the case again as soon as the delivery note has been processed. The result then shows on every invoice in the case.

How does PaperOffice spot duplicate invoices?

From AI-DMS Premium, it looks for earlier documents with the same content or the same document number from the same issuer. A match appears as a notice on the document, and you hide false alarms with "Not a duplicate".

Who approves, and when do two people review?

When a trigger rule matches, the HITL Agent creates the task for a group. With the amount rule, more people review from your amount on; if the amount is missing or the currency differs, two do.

What does it cost?

Billing is based on usage, depending on tier and function. The pricing page shows the details: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Run through one case.

Seven made-up files from a German maker of upholstered furniture show the whole path: from the inbox to the review task.

INVOICE PROCESSING TEST PACKAGE

Seven files and a guide (README.txt)

Bestellung_PO-2026-0412_Lindqvist.pdf Purchase order, 3 line items
 Lieferschein_LS-88213_Lindqvist.pdf Delivery note for the order
 Rechnung_SL-2026-1187_Lindqvist.pdf Invoice with a higher unit price
 ZUGFeRD_RG-2026-30418_Rautenberg.pdf E-invoice with embedded XML
 Scan_Rechnung_KB-26-5531_Kornmeyer.pdf Invoice as a scan
 E-Mail_Kornmeyer_KB-26-5531.eml The same invoice by email
 Rechnung_SA-2026-0977_Ahlgrimm.pdf Invoice with new bank details
paperoffice.ai/downloads/paperoffice-ai-test-package-invoice-processing.zip



- 1 **Workspace:** create "Incoming Invoices", type "Accounting", Workspace type Business, AI-DMS Premium (chapter 04).
- 2 **Agents:** upload the purchase order, create the three 3-way templates as agents in the agent creator, set the default IDP Agents and apply one to the purchase order (chapter 08).
- 3 **Review task:** optionally create a HITL Agent with an amount rule from 5,000 (chapter 11).
- 4 **Upload:** the other six files via "Add document".
- 5 **Ultra:** process the Ahlgrimm invoice with Ultra via [Actions](#) › [Agents & workflows](#) › [AI-DMS](#) .

FILE	WHAT TO LOOK FOR
Purchase order and delivery note	types "Purchase Order" and "Delivery Note", PO reference PO-2026-0412
Lindqvist invoice	Audit tab: 3-way match "Variance", unit price of ST-4410
Rautenberg e-invoice	Audit tab: e-invoice protocol "E-invoice valid"
Kornmeyer, scan and email	"Possible Duplicate" notice on the second arrival
Ahlgrimm invoice	with Ultra: "Fraud Risk", security quarantine

All company names, personal names, addresses, tax and bank details and amounts in the test package are made up; the IBAN is a test IBAN. The pricing page shows what the test costs: paperoffice.ai/en/pricing.

15 · READ MORE: DATASHEETS AND SHORT GUIDE

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

The datasheets describe the building blocks of this guide one by one, with menu paths and settings. The short guide sums up the topic on eight pages.

SHORT GUIDE

Invoice processing on eight pages

The problem, the path with PaperOffice, the click paths, an example and a checklist. Good for colleagues who want to see the overview first.

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



DATASHEETS

DATASHEET

Workspaces: types, tiers and permissions

DATASHEET

Connectors: connect inboxes and folders

DATASHEET

Network Scanner: scans via SFTP

DATASHEET

Mobile App: receipts on the go

DATASHEET

Split Agent: separate batches

DATASHEET

Classification: type, sender, amounts

DATASHEET

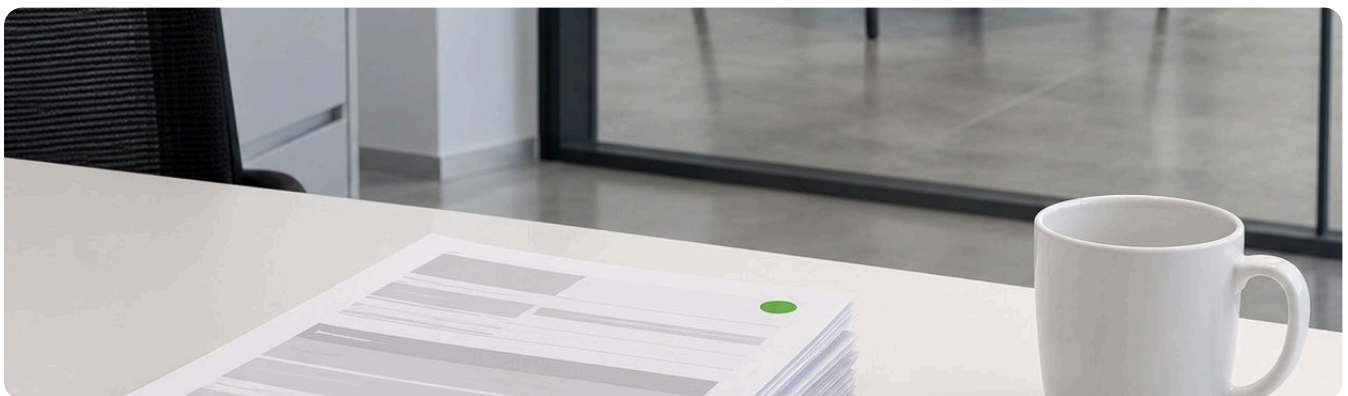
IDP Agent: fields and line items

DATASHEET

Audit Center: findings and quarantine

DATASHEET

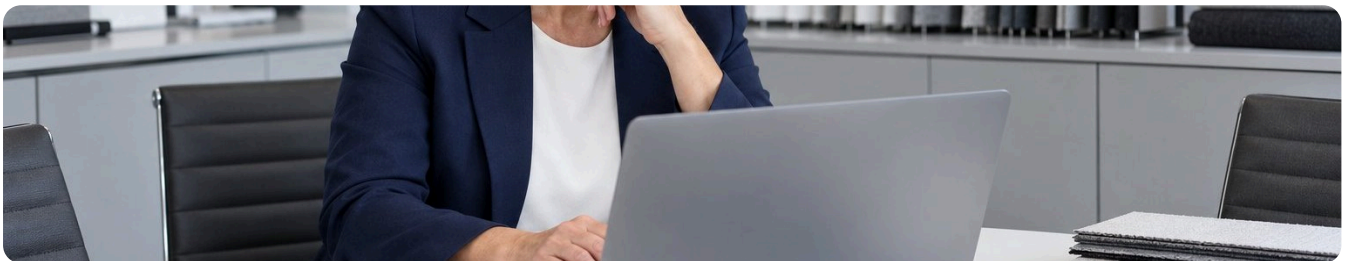
VAT ID Check via VIES



16 · YOUR FIRST RESULT IN FIVE DAYS

Start with one supplier. Then add each next one.

To get started, all you need is one supplier who sends PO reference and item numbers, and one week's invoices.



1

Day 1 · Workspace and inbox

Create the "Incoming Invoices" Workspace, choose AI-DMS Premium, set up the Storage Mount "Email (IMAP)" and a connector.

2

Day 2 · Paper and smartphone

Enter the Scanner Endpoint on the device, create a connector, pair smartphones via "Mobile devices".

3

Day 3 · Procurement

Create the three 3-way agents from the catalog, set default IDP Agents on Invoice, Delivery Note and Purchase Order.

4

Day 4 · Review task

Create a HITL Agent with a group and amount rule, set the quarantine threshold, decide whether Ultra runs.

5

Day 5 · Handover

Choose export, REST API or webhook for your accounting and run through the week's invoices.

MEASURE THESE FOUR VALUES

Intake

Invoices per week arriving in the Workspace through all paths

Match OK

Share of cases with "Match OK" instead of "Variance"

Time to approval

Time from arrival to "Approve" in the review task

Flags

Possible duplicates and cases in quarantine per month

Measure the first week closely. Only the comparison with the following weeks shows how much searching and keying in goes away.

17 · CHECKLIST AND START

Before you expand.

- ☐ All invoice paths lead into one Workspace: inbox, scanner, upload and smartphone.
- ☐ The Workspace's AI-DMS tier is a deliberate choice, at least Premium.
- ☐ Purchase orders and delivery notes sit in the same Workspace as the invoices.
- ☐ Your suppliers send PO reference, item numbers and quantities in your unit.
- ☐ The three agents for purchase order, delivery note and invoice are created and the default IDP Agents are set.
- ☐ Someone looks at possible-duplicate notices before payment.
- ☐ It is defined from which amount two people review and who releases a quarantine.
- ☐ A run with the test package is done.

GET STARTED NOW

Create an account, set up the "Incoming Invoices" Workspace, upload the test package.
Billing is based on usage, and the pricing page shows the details.

app.paperooffice.ai**THE SOLUTION ON PAPEROFFICE.AI**

Invoice processing with PaperOffice: intake, reading, matching and approval on one page.

paperooffice.ai/en/solutions/process/ai-invoice-processing-automation-ocr

**QUESTIONS ABOUT THIS GUIDE?**

Write to us if you have questions about setup or your invoice intake.

paperooffice.ai/contact

As of October 2026. Screenshots are from a test account. All examples, company names, personal names, tax and bank details and values in this guide are made up.
PaperOffice, paperooffice.ai.