

Checking delivery notes against the order line by line?

The variance per item is already there.

Delivery notes arrive at the gate, mill certificates by email, invoices days later. This guide shows how PaperOffice captures your goods-receipt documents, reads line items and batches, and matches order, delivery note and invoice by the purchase order reference.



TRY IT YOURSELF IN 45 MINUTES

Two purchase orders in eight files: a stamped delivery note scan with two batches, a phone photo, a mill certificate by email, an inspection report and an invoice with an over-delivery and a new unit price. Includes a test package to follow along.

WHY THIS GUIDE

Time isn't lost on deciding. It's lost on comparing.

Before anyone decides on an over-delivery or a new price, someone lays three documents side by side and goes through them line by line.



In many plants, checking starts with a stack of paper. The delivery note comes with the truck, the mill certificate goes to purchasing, the invoice to accounting. Anyone who wants to know whether item, quantity and price match the order first collects everything and then types it up.

This guide shows how PaperOffice takes over that part: one workspace for goods receipt, the network scanner at the gate as an inbox, IDP Agents for line items and batches, and a 3-way match per purchase order reference. Every step comes with its path in the app. With our test package, you can try it yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice

WHO THIS IS FOR

Goods receipt

You accept goods and delivery notes at the gate and want to know whether the delivery matches the order.

Purchasing

You settle over-deliveries, prices and missing documents with the supplier.

Quality

For every batch, you need the delivery note, the certificate and the inspection report.

OVERVIEW

Contents

01	Monday, 7:40 a.m. at the gate	04
02	What holds up goods receipt	05
03	The process at a glance	06
04	One workspace for goods receipt	07
05	Connecting the gate scanner and the mailbox	08
06	Recognizing document types	09
07	Creating agents for line items	10
08	Reviewing line items and batches	11
09	Grouping by purchase order reference	12
10	What the match needs	13
11	Resolving variances on the invoice	14
12	Tracing a batch, handing over data	15
13	What teams ask when they start	16
14	Try it yourself in 45 minutes	17
15	Further reading: datasheets and short guide	18
16	Your first result in five days	19
17	Checklist and start	20

AT A GLANCE

- Orders, delivery notes and invoices of one plant sit in one workspace with AI-DMS Premium.
- The network scanner at the gate scans via SFTP into its own inbox, and a connector brings the scans into the workspace.
- IDP Agents created from templates read the purchase order reference and line items, on the delivery note also batch, serial number and weight.
- PaperOffice matches documents with the same purchase order reference by item number: Ordered, Delivered, Invoiced.
- Booking stays in your ERP. PaperOffice delivers the fields by export or REST API.

01 · MONDAY, 7:40 A.M. AT THE GATE

Three documents, one delivery. And the machine is waiting.

At Drevholm Präzisionstechnik GmbH, a machining company with 140 employees, the truck from Ostrelin Halbzeuge is standing at gate 2.



On the pallet are aluminum round bars from two batches, brass, and 42CrMo4 round steel. Delivery note LS-88130 carries the goods-receipt stamp, and someone has written in the margin: "2 bars 42CrMo4 too many".

The mill certificate for aluminum batch 2211 sits in purchasing's mailbox, purchase order PO-2026-0447 in the ERP. The invoice arrives two days later, with twelve instead of ten bars of round steel and a higher price for the brass. Production manager Sandra Wehling needs the material for a job on Wednesday.

THE REAL HURDLE

Whether quantity and price are right only shows once someone lays order, delivery note and invoice side by side. Until then, the goods wait at goods receipt or go into production unchecked.

02 · WHAT HOLDS UP GOODS RECEIPT

Four time-wasters. Each one small on its own.

Hardly any delivery note is difficult. What costs time is that the documents arrive separately and every line is compared by hand.

Three channels, three places

The delivery note comes with the goods, the certificate by email, the invoice by mail. What belongs together sits in three places.

Every supplier, a different layout

Item, quantity and batch appear differently on every supplier's document. Still, every line gets typed up.

Comparing line by line

Ordered, delivered, invoiced: an over-delivery or a new unit price only shows up when someone compares the three documents.

Tracing the batch

In a complaint, what counts is which delivery note, which certificate and which inspection report belong to the batch.

TIME-WASTER	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Three channels	Gate scanner, email mailbox and upload deliver into the same workspace	scan, photo, email and PDFs
Every supplier, a layout	IDP Agents read line items by content, every row with its source in the original	two suppliers, two layouts
Line by line	3-way match per purchase order reference and item number	12 instead of 10 bars, brass more expensive
Tracing the batch	Search across the recognized text of all documents, scans included	batch 2211 in three documents

The test package on page 17 contains exactly these cases, invented but typical for a machining company.

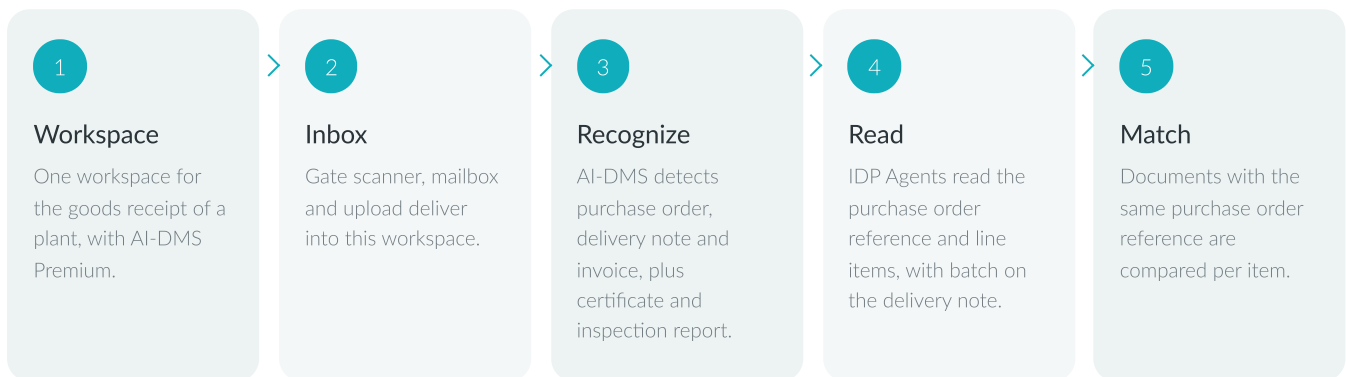
WHAT REMAINS IN YOUR HANDS

The decision on acceptance, complaint and price, the booking in the ERP and the release by quality. PaperOffice reads, organizes and shows where the documents differ from each other.

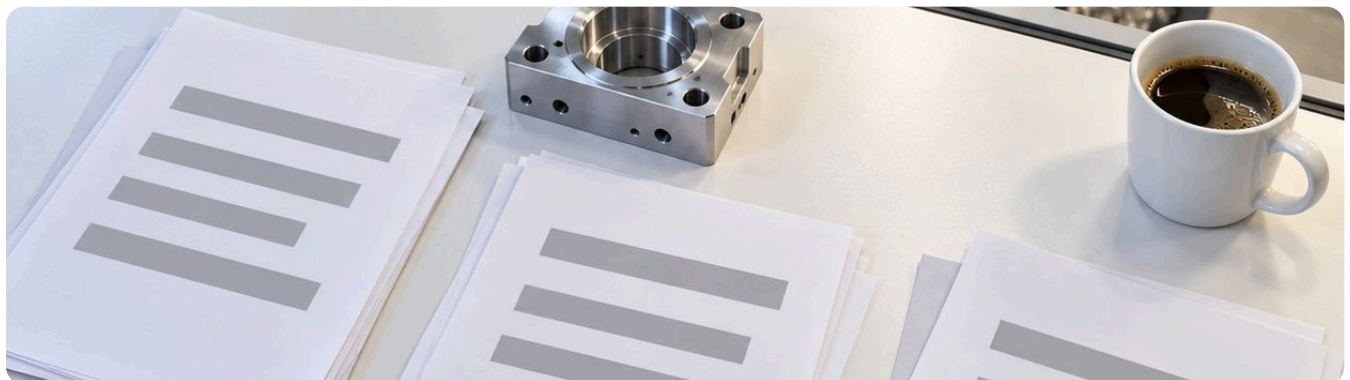
03 · THE PROCESS AT A GLANCE

Five stations. From the gate to the match.

Every document follows the same path, whether it is scanned at the gate, photographed or sent by email.



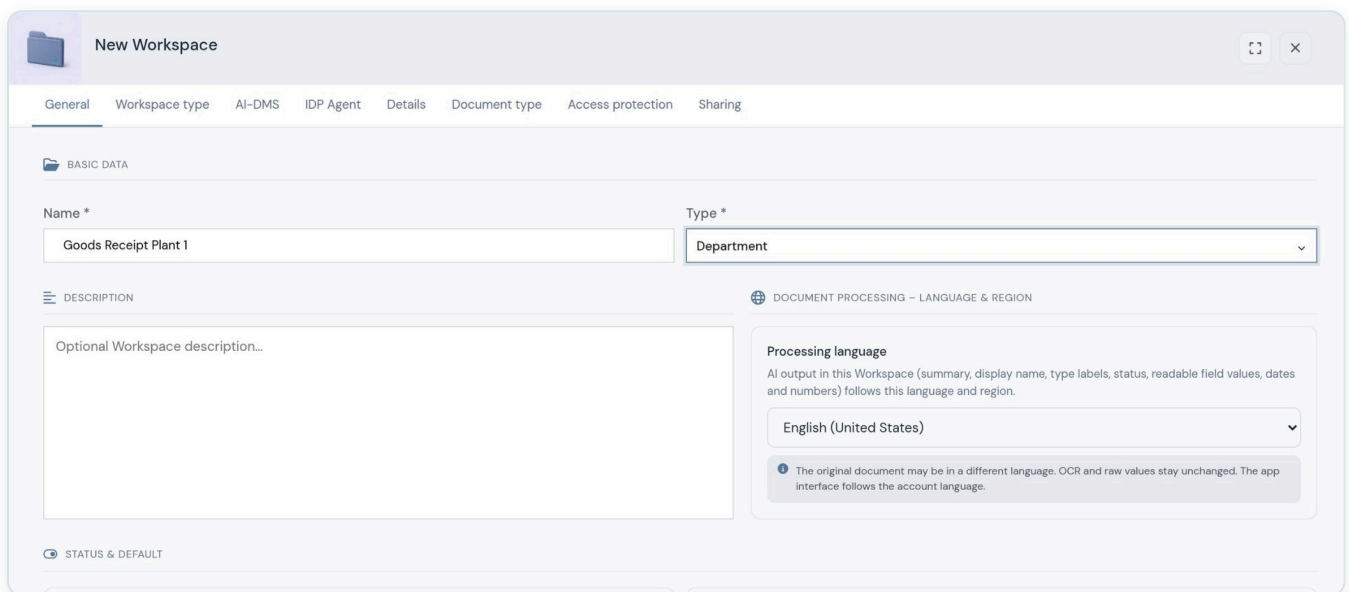
STATION	WHAT PAPEROFFICE DOES	WHAT YOUR PLANT DECIDES
Workspace	keeps goods-receipt documents apart from other departments	one per plant, and team rights
Inbox	accepts scans, photos, emails and files	which scanner and which mailbox deliver
Recognize	assigns a document type to every document	your own types such as mill certificate
Read	reads header data, line items and batches with their source	which templates and which model tier
Match	compares quantities and prices per item number	who decides on a variance



04 · ONE WORKSPACE FOR GOODS RECEIPT

One plant, one workspace. All three documents inside.

The match looks for order, delivery note and invoice in the same workspace. So create one workspace per plant: [Document AI](#) > [Workspaces](#), then “Create New Workspace”.



- 1 **Create.** Name “Goods Receipt Plant 1”, type “Department”. On the “Workspace type” tab, choose Business, on the “AI-DMS” tab the Premium tier.

Premium tier

Premium reads sender, amounts and the reference, document and transaction numbers. The match builds on these.

Business type

Business adds the recycle bin, access protection with password or SMS code, and external sharing.

Team rights

Group rights per workspace: view and download, plus upload or full access.

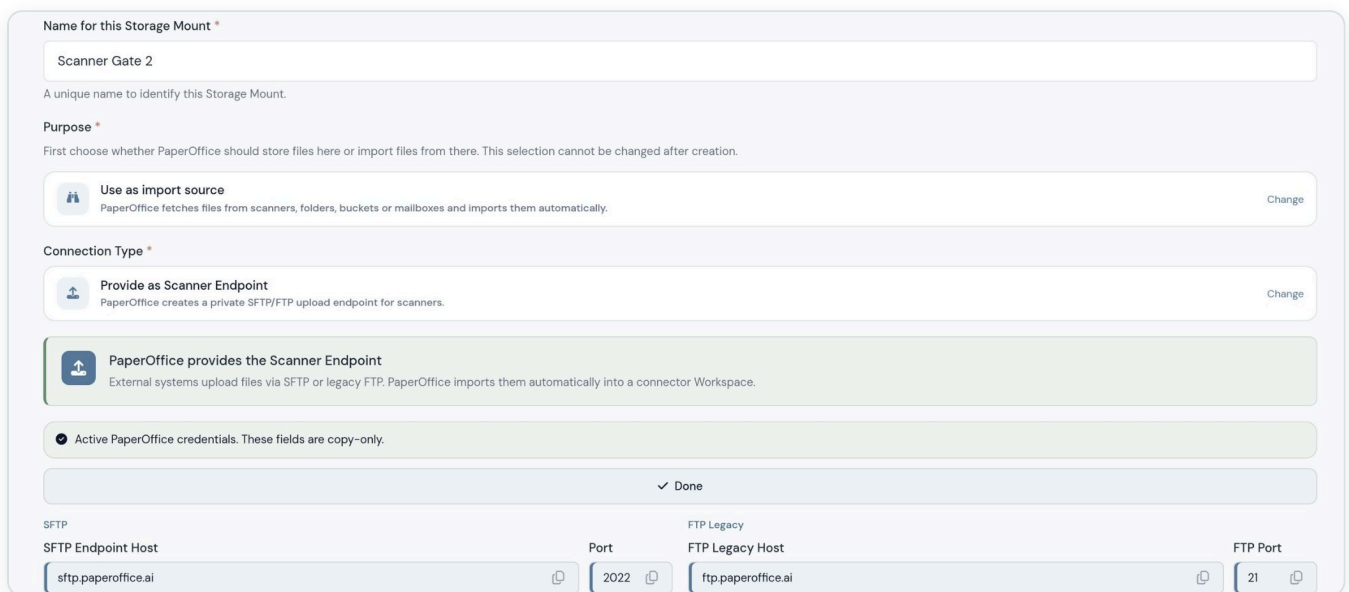
GOOD TO KNOW

Drawings and formulations belong in a separate workspace, such as “Engineering”, with its own group rights. That way goods receipt sees what it needs, and engineering keeps its documents to itself.

05 · CONNECTING THE GATE SCANNER AND THE MAILBOX

Scan at the gate. Arrive in the workspace.

PaperOffice provides your network scanner with its own SFTP inbox. A connector picks up the scans there and brings them into the goods-receipt workspace.



Name for this Storage Mount *

Scanner Gate 2

A unique name to identify this Storage Mount.

Purpose *

First choose whether PaperOffice should store files here or import files from there. This selection cannot be changed after creation.

Use as import source
PaperOffice fetches files from scanners, folders, buckets or mailboxes and imports them automatically.

Connection Type *

Provide as Scanner Endpoint
PaperOffice creates a private SFTP/FTP upload endpoint for scanners.

PaperOffice provides the Scanner Endpoint
External systems upload files via SFTP or legacy FTP. PaperOffice imports them automatically into a connector Workspace.

Active PaperOffice credentials. These fields are copy-only.

✓ Done

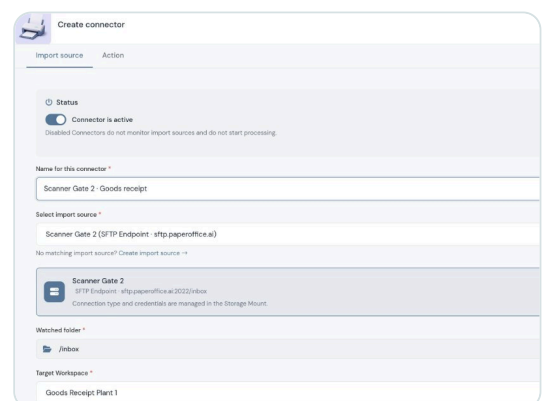
SFTP	Port	FTP Legacy	FTP Port
SFTP Endpoint Host	2022	FTP Legacy Host	21
sftp.paperoffice.ai		ftp.paperoffice.ai	

1 **Scanner Endpoint.** Under **Document AI** > **Storage Mounts**, “Add Storage Mount”, then “Use as import source” and “Provide as Scanner Endpoint”. “Activate Endpoint” shows host, port 2022, user and password, and below them the target folder /inbox. Enter these details on the device.

1 **Create a connector:** under **Document AI** > **Connectors**, “Create connector”; on the “Import source” tab, choose the Scanner Endpoint and the goods-receipt workspace as “Target Workspace”.

2 **Schedule:** on the “Action” tab, turn on “Scheduled polling active” and choose the interval, from every minute.

3 **Mill certificates:** a connector on purchasing's mailbox (IMAP) files every attachment as a document of its own.



Create connector

Import source

Action

Status

Connector is active

Disabled Connectors do not monitor import sources and do not start processing.

Name for this connector *

Scanner Gate 2 - Goods receipt

Select import source *

Scanner Gate 2 (SFTP Endpoint: sftp.paperoffice.ai)

No matching import source? Create import source →

Scanner Gate 2
SFTP Endpoint: sftp.paperoffice.ai:2022/inbox
Connection type and credentials are managed in the Storage Mount.

Watched folder *

/inbox

Target Workspace *

Goods Receipt Plant 1

FOR SINGLE DOCUMENTS

In the workspace, “Add document”: on the “Mobile devices” tab, goods receipt photographs a delivery note via the QR code; on the “Scanner” tab, new scans are ready for upload.

06 · RECOGNIZING DOCUMENT TYPES

Delivery note, certificate, report. The type is set.

With every processing run, AI-DMS assigns a document type. For the match, what counts is purchase order, delivery note and invoice.

Goods Receipt Plant 1

Options Current versions Add document

Ctrl+C copies the selected cells — paste into Excel with Ctrl+V

	NAME	TYPE	SENDER	DATE	AMOUNT	ST.	P.
1	Invoice RN-77310 Drevholm Präzisionstechnik GmbH 2026-10-05.pdf	Invoice	Tessbruck Normteile KG	10/21/26	166.60 EUR	-	1
2	Invoice RE-2026-31877 Drevholm Präzisionstechnik GmbH 2026-10-07.pdf	Invoice	Ostrelin Halbzeuge GmbH	10/21/26	4,905.89 EUR	-	1
3	Inspection Report WEP-2026-1187 Drevholm Präzisionstechnik GmbH 2026-10-05.pdf	Inspection Report	Drevholm Präzisionstechnik GmbH	10/21/26		Final	1
4	Certificate WZ-2026-4410 Ostrelin Halbzeuge GmbH 2026-10-01.pdf	Certificate	Ostrelin Halbzeuge GmbH	10/21/26		-	1
5	Delivery Note LS-2026-5521 Drevholm Präzisionstechnik GmbH 2026-10-02.jpg	Delivery Note	Tessbruck Normteile KG	10/21/26		-	1
6	Purchase Order PO-2026-0452 Tessbruck Normteile KG 2026-09-24.pdf	Purchase Order	Drevholm Präzisionstechnik GmbH	10/21/26	166.60 EUR	-	1
7	Purchase Order PO-2026-0447 Ostrelin Halbzeuge GmbH 2026-09-21.pdf	Purchase Order	Ostrelin Halbzeuge GmbH	10/21/26	4,547.23 EUR	-	1
8	Delivery Note LS-88130 Drevholm Präzisionstechnik GmbH 2026-10-05.pdf	Delivery Note	Ostrelin Halbzeuge GmbH	10/21/26		Received	1

- The test package documents in the “Table” view. Purchase Order, Delivery Note and Invoice for two orders, the mill certificate from the email as “Certificate”, the incoming inspection as “Inspection Report”.

Bind IDP Agent

Basics Legal region Default IDP Agent Retention Templates

Automatic processing

Choose the agent that runs after this document type is recognized.

Default IDP Agent

Select IDP Agent

Analyze Delivery Note

Alternatively no automatic IDP Agent.

Analyze Delivery Note

View agent

Execution order

1 AI-DMS recognition
This document type is recognized automatically.

2 Default IDP Agent
This selected agent is executed.

3 Workspace pipeline
The document is processed.

Without a default IDP Agent only the Workspace pipeline runs.

One agent per type

Under **Document AI** > **Document Types**, select the Delivery Note type, “Actions” > “Bind IDP Agent”, pick the agent on the “Default IDP Agent” tab and save; likewise on Purchase Order and Invoice. It then runs on every newly detected document of that type, in all workspaces of your account.

Your own type: mill certificate

With “New document type”, enter a name and the “Instruction for the AI” in English, for example: inspection certificate per EN 10204 with heat or batch number. No training is needed.

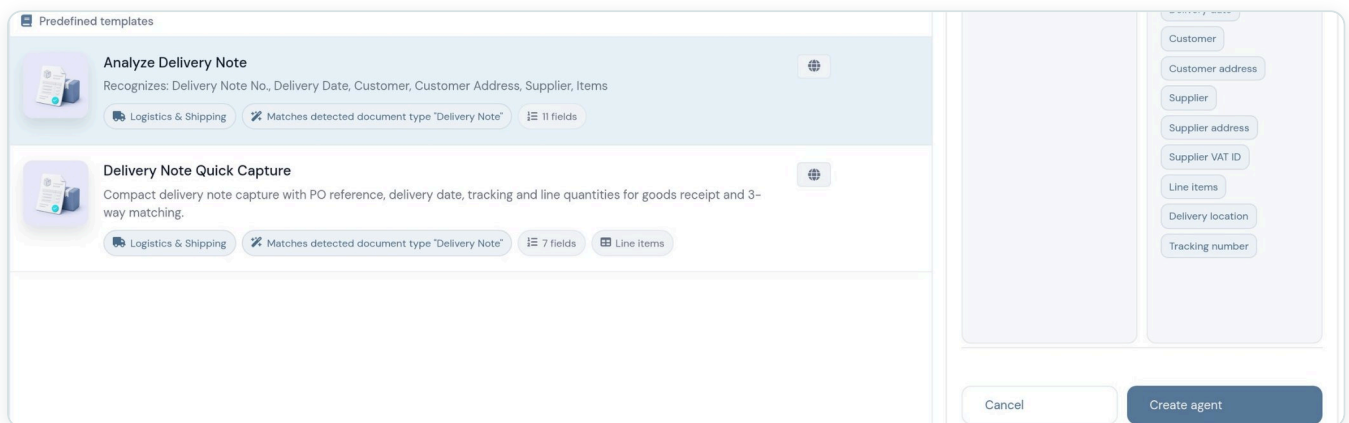
IN THE CATALOG FOR MANUFACTURING

Certificate, Test Report, Technical Drawing, Declaration of Conformity, Inspection Report and Work Order are available as system types. Anything the AI cannot assign to a type with confidence goes to “Other / Uncategorized”.

07 · CREATING AGENTS FOR LINE ITEMS

Three templates. Order, delivery note, invoice.

An IDP Agent reads the line items. Select a delivery note, then **Actions** > **Agents & workflows** > **IDP** and “Create new agent”.



- 1 **Choose a template.** Search for “delivery note” and choose “Analyze Delivery Note”; the recommended model and the fields appear on the right. Then click “Create agent”. Create “Process Order” and “Extract Invoice (Full)” the same way.

TEMPLATE	READS, AMONG OTHER THINGS	PURCHASE ORDER REFERENCE
Analyze Delivery Note	delivery note number, delivery date, supplier, line items with item, quantity, unit, batch, serial number and weight	field “Purchase order reference”
Process Order	order number, order date, supplier, total amount, line items with quantity, unit and unit price	as order number
Extract Invoice (Full)	invoice number, amounts, supplier, IBAN, line items with quantity and unit price	field “Purchase order reference”

- 1 **Check the model:** the three templates come with “Premium Pro Max”, shown under “Change AI model”. Stay with a Premium tier: it reads tables, and the invoice template has more than ten fields.
- 2 **Test:** “Start full test run” shows result, confidence, page and source for each field.
- 3 **Save:** “Save and close”. Then bind the agent to the matching document type (Chapter 06).

GOOD TO KNOW

You may adjust the prompts and labels of the fields. Keep the key names of the fields “Line items” and “Purchase order reference” as they are: the match reads exactly these fields.

08 · REVIEWING LINE ITEMS AND BATCHES

Every row with its batch. Every column against the scan.

In the delivery note, open the **Data Fields** tab. If the agent did not run automatically, start it there with “Apply Agent”.

The screenshot displays the PAPEROFFICE interface. On the left, a scanned delivery note from Ostrein Halbzuge GmbH is visible, featuring a stamp from DREVHOLM - WERK 1 dated 05.10.2026 and a handwritten note: "2 Stangen 42CrMo4 zu viel". On the right, the software's data processing interface is shown, with the "Data Fields" tab selected. It displays the Transaction Number "PO-2026-0447" and a table titled "Line Items" with 4 rows and 7 columns. The table contains the following data:

	Position	Item nu...	Descript...	Batch n...	Quantit...	Unit	Weight
1	1	AL-6082-D40	Rundstange EN	2211	16	St.	162.9
2	2	AL-6082-D40	dto.	2214	8	St.	81.4
3	3	MS-CW614N-C	Messing CW61	M-5530	6	St.	74.8
4	4	ST-42CRMO4-	Rundstahl 42C	S-7781	12	St.	799

- 1 The delivery note from the test package. On the left the scan with stamp and margin note, on the right PO-2026-0447 in the “Transaction Number” field and the “Line Items” table with four rows: the aluminum round bar in batches 2211 and 2214 (16 and 8 pieces), brass 6 and 12 bars of round steel, each with item number and weight.

Copy for Excel

The button above the table copies all rows, for example for the goods-receipt posting in the ERP.

Two batches, one item

If an item appears in two rows, the match adds up the quantities: 16 and 8 bars make 24.

Stamps and handwriting

With AI-DMS Ultra, handwriting, stamps and signatures are added as separate details, such as the note in the margin.

TIP FROM PRACTICE

Test the agent on delivery notes from three suppliers, including a stamped scan. That way you see before going live whether item number, quantity and batch land in the right column.

09 · GROUPING BY PURCHASE ORDER REFERENCE

One reference, one group. The status is in the header.

In the document list, choose “Group by” and “Purchase order reference (PO)”. Each group shows whether order, delivery note and invoice are present, and where the match stands.

	DOCUMENT	DOCUMENT TYPE	KEYWORDS	DOCUMENT STATUS	ADDED	AUTOMATION
▶	PO-2026-0447 (5 documents)	Order	Delivery note	Invoice	Variance	View case Match details
▶	PO-2026-0452 (3 documents)	Order	Delivery note	Invoice	Match OK	View case Match details

- Two orders from the test package. PO-2026-0447 with five documents shows “Variance”, PO-2026-0452 “Match OK”. Documents without a reference are collected in the group “No purchase order reference”.

3-way match

Purchase order reference: PO-2026-0447

Variance

CHECKS

✓ All documents present
✗ Header amount matches
✗ Delivery ≤ order quantity
✓ Quantities match
✗ Unit prices match

HEADER AMOUNTS

PO total
3,821.20

Invoice total
4,122.60

LINE ITEMS

SKU	ORDERED	DELIVERED	INVOICED	STATUS
AL-6082-D40	24	24	24	OK
MS-CW614N-D25	6	6	6	Variance
ST-42CRMO4-D60	10	12	12	Variance

- “Match details”. Five checks, the header amounts and, per item number (SKU), Ordered, Delivered, Invoiced. AL-6082-D40 shows 24, 24, 24 and OK; brass (6, 6, 6, new price) and round steel (10, 12, 12) show Variance.

The group shows the status “Match OK”, “Variance”, “Partial match” or “No line items” as soon as order, delivery note and invoice are present.

10 · WHAT THE MATCH NEEDS

Same reference, same number. Same unit.

The match groups documents by purchase order reference and lines up line items by item number. These five rules decide whether it works.

RULE	HOW PAPEROFFICE CALCULATES	YOUR LEVER
PO reference	Documents form a group when the purchase order reference is spelled the same. "PO-2026-0447" and "PO 2026/0447" are two groups.	Order numbers in the pattern PO-year-number, copied unchanged by suppliers.
Item number	Line items are lined up by item number. Upper and lower case and spaces do not count, hyphens and dots do: "AB-100" and "AB100" are two items.	Your item number on delivery note and invoice.
Unit of measure	The quantity is compared as the number on the document: "4 rolls" and "200 m" count as 4 and 200.	Order in the unit that is delivered and invoiced.
Tolerance	Quantities must match exactly. For the header amount, differences up to 1% count as equal, for the unit price up to 2%.	Check small price changes on the document.
One document per role	The dialog takes one order, one delivery note and one invoice per group; if there are several, the one with the most line items in each case. Each invoice carries its own result on the Audit tab.	Look at partial deliveries in the group.

Short delivery

If delivery note and invoice both state 8 of 10 ordered pieces, the line item counts as OK. The header amount then shows the variance.

No item numbers

If none of the documents has line items with an item number, the group shows "No line items" and PaperOffice compares the header amount.

Filing order confirmations

File your suppliers' order confirmations in a separate workspace, such as "Purchasing Plant 1". The match looks in the goods-receipt workspace and so compares your own purchase order.

Pattern PO-year-number

PaperOffice also finds order numbers such as PO-2026-0447 in the text of order, delivery note and invoice and enters them as the purchase order reference.

11 · RESOLVING VARIANCES ON THE INVOICE

The result is on the invoice. With the reason per item.

As soon as a document of the group has finished processing, PaperOffice re-runs the match for the purchase order reference and stores the result on every invoice whose purchase order it finds by the purchase order reference, on the **Audit** tab.

Ostrelin Halbzuge GmbH · Hafenstraße 41 · 47999 Stahlhofen

Drehholm Präzisionstechnik GmbH
Buchhaltung
Industriestraße 18
72999 Werkheim

Rechnungsnummer RE-2026-31877
Rechnungsdatum 07.10.2026
Lieferdatum 05.10.2026
Ihre Bestellung PO-2026-0447
Lieferschein LS-88130

Rechnung RE-2026-31877

Sehr geehrte Damen und Herren,

Ihre Bestellung PO-2026-0447, Lieferschein LS-88130. Für unsere Lieferung vom 05.10.2026 berechnen wir:

Pos	Artikel-Nr.	Bezeichnung	Menge	Einheit	Preis/Einheit	Gesamt
1	AL-6082-D40	Rundstange EN AW-6082 T6 Ø 40 mm, 3 m	24	St.	86,50	2.076,00
2	MS-CW614N-D25	Messing-Rundstange CW614N Ø 25 mm, 3 m	6	St.	57,10	342,60
3	ST-42CRMO4-D60	Rundstahl 42CrMo4+QT Ø 60 mm, 3 m	12	St.	142,00	1.704,00
Nettobetrag						4.122,60 EUR
USt 19 %						783,29 EUR
Gesamtbetrag						4.905,89 EUR

Zahlbar innerhalb von 30 Tagen ohne Abzug.

Mit freundlichen Grüßen
Ostrelin Halbzuge GmbH

Ostrelin Halbzuge GmbH · Hafenstraße 41 · 47999 Stahlhofen
Tel: 040 66969 230 · USt-Nr: DE123456789

IBAN DE02 3203 0000 0000 2302 51 (BIC: 25120303)

Connections

3-way match
Variance
Review required

Purchase order reference
PO-2026-0447

Checked at
Oct 21, 2026, 10:03 PM

Open purchase order Open delivery note

Checks

OK Order found

OK Delivery note found

Not met Amounts match the order
PO total 3,821.20 Invoice total 4,122.60

Not met Quantities and prices per item match

Item	Order Quantity	Delivery note Quantity	Invoice Quantity
MS-CW614N-D25 Unit price differs from order price	6	6	6 Price 57,10
ST-42CRMO4-D60 Delivery quantity exceeds order quantity	10	12	12

- The invoice from the test package. "Variance" and "Review required". Order and delivery note found, amounts not met, below them the deviating line items: "Delivery quantity exceeds order quantity" for the round steel, "Unit price differs from order price" for the brass.

NOTE ON THE ITEM	TYPICAL RESOLUTION
Delivery quantity exceeds order quantity	accept or return the extra quantity, agree with purchasing
Invoice quantity differs from delivery quantity	request a corrected invoice from the supplier
Unit price differs from order price	compare the price with the order and the framework agreement

Open the documents

"Open purchase order" and "Open delivery note" lead to the documents used for the comparison. "Checked at" states the time.

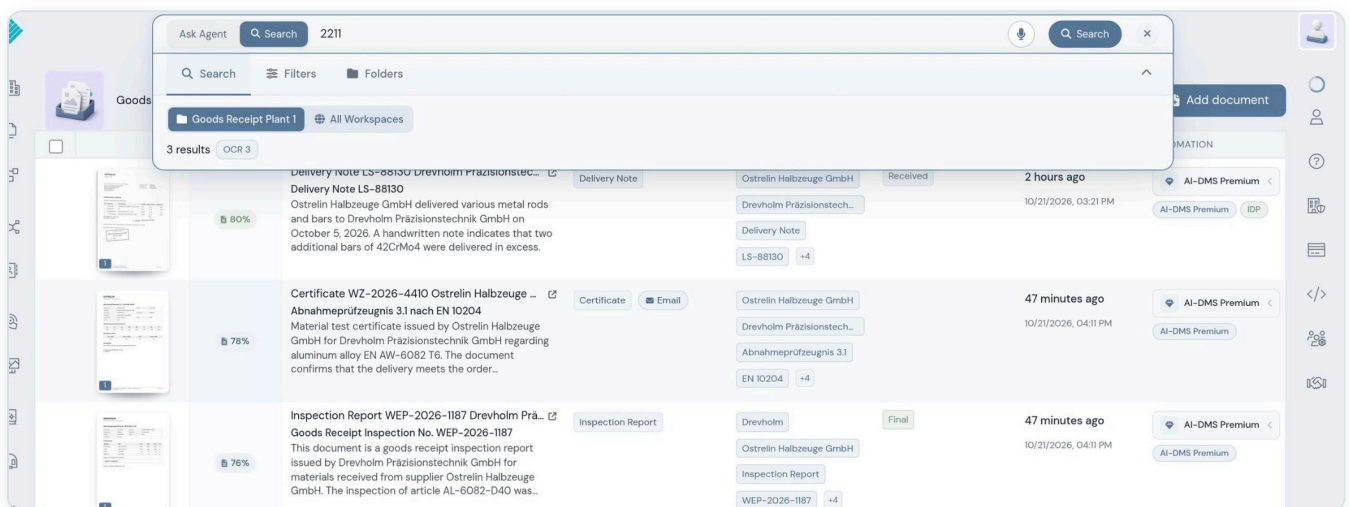
Before the delivery note

If only order and invoice are present so far, PaperOffice already compares header amount, quantities and prices on the invoice against the order.

12 · TRACING A BATCH, HANDING OVER DATA

Search for batch 2211. Find three documents.

Search finds a batch number in the recognized text of every document, scans included. Results come from the workspaces you have rights to.



- 1 Search for "2211". Scope "Goods Receipt Plant 1", 3 results: delivery note, mill certificate and inspection report of the aluminum batch in one result list, the email itself not.

Ask instead of search

"Ask Agent" opens Document Chat. Choose goods receipt as the "Search scope" and ask, for example, "Which certificate belongs to batch 2211?". The documents found are listed below the answer.

ROUTE TO THE ERP	HOW IT WORKS	IDEAL FOR
Copy for Excel	Button above the line item table on the Data Fields tab	single deliveries
Export	Results of an IDP Agent as JSON, CSV or .xlsx	lists for purchasing and quality
REST API	POST /documents/idp-agent-run reads the fields, GET /knowledge_graph/procurement_case returns the match per purchase order reference	connecting your ERP

Booking stays in your ERP. PaperOffice delivers the extracted fields and the status of the match.

13 · WHAT TEAMS ASK WHEN THEY START

Eight questions from goods receipt, purchasing and quality.

**Do we need a template per supplier?**

No. You create the agent once from a template, and it reads the fields by content, even in a new layout. Test with documents from several suppliers before it runs automatically.

What does the match need?

Order, delivery note and invoice in the same workspace, with an identically spelled purchase order reference. For quantities and prices, line items need the same item number.

We order in rolls, the supplier delivers in meters?

The match compares the quantity as a number. So order in the unit that is delivered and invoiced, for example in meters instead of rolls.

Are batch and serial numbers read?

Yes, if the delivery note shows them. "Analyze Delivery Note" reads them as columns of the line items. For certificates, you add batch and material as fields of their own.

And stamped or handwritten documents?

AI-OCR also reads scans and photos. With AI-DMS Ultra, handwriting, stamps and signatures are added. Check values from handwriting against the original before they go into the ERP.

How does the data get into our ERP?

Booking stays in your ERP. PaperOffice delivers the fields by export or through the REST API, and the match per purchase order reference by API as well.

How do we protect drawings?

In a separate workspace with group rights, from Business on with a password or SMS code. You file new revisions via "Versions" and "Upload new version"; the previous one remains.

What does it cost?

Costs follow usage, depending on the tier. The automatic match on the invoice counts as well. The pricing page lists the prices: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Run two orders end to end.

Eight invented files from a German machining company, in German like many supplier documents, show the whole path: from the stamped delivery note to the variance on the invoice.

MANUFACTURING TEST PACKAGE

Eight files and a guide (README.txt)

Bestellung_PO-2026-0447_Ostrelin.pdf Purchase order, three line items
 Scan_Lieferschein_LS-88130.pdf Scan with stamp and note, two batches
 Rechnung_RE-2026-31877_Ostrelin.pdf Over-delivery and new unit price
 E-Mail_Ostrelin_Zeugnis_LS-88130.eml Email with 3.1 inspection certificate
 QS-Bericht_WEP-2026-1187.pdf Incoming inspection for batch 2211
 Bestellung_PO-2026-0452_Tessbruck.pdf Purchase order for standard parts
 Foto_Lieferschein_Tessbruck.jpg Phone photo of the delivery note
 Rechnung_RN-77310_Tessbruck.pdf Invoice matching the order
paperoffice.ai/downloads/paperoffice-ai-test-package-manufacturing.zip



- 1 **Workspace:** at app.paperoffice.ai, create “Goods Receipt Plant 1”, type Department, Business, AI-DMS Premium (Chapter 04).
- 2 **Agents:** create the three templates with a Premium tier and bind them under Document Types; this applies to your whole account (Chapters 06 and 07).
- 3 **Upload:** all eight files via “Add document”, the photo preferably via “Mobile devices”.
- 4 **Group:** “Group by”, “Purchase order reference (PO)”, then “Match details” (Chapter 09).
- 5 **Resolve and search:** invoice RE-2026-31877, “Audit” tab, then search for “2211” (Chapters 11 and 12).

FILES	WHAT TO LOOK FOR
Ostrelin, three documents	Group PO-2026-0447 shows “Variance”: 12 instead of 10 bars of round steel, brass at 57.10 instead of 54.20
Delivery note scan	Batches 2211 and 2214 as separate rows, 24 aluminum bars in total
Tessbruck, three documents	Group PO-2026-0452 shows “Match OK”
Certificate and report	Certificate as its own document marked “Email”, both found via “2211”

All company names, personal names, addresses, numbers, bank details and amounts in the test package are fictional. The cost of the test is shown on the pricing page: paperoffice.ai/en/pricing.

15 · FURTHER READING: DATASHEETS AND SHORT GUIDE

More on every building block. As a PDF to pass on.

Every module in this guide has its own datasheet with features, click paths and technical details. The short guide sums up the topic in eight pages.

SHORT GUIDE INDUSTRY AND MANUFACTURING

The essentials in eight pages

For purchasing, quality and plant management: the problem at goods receipt, the route with PaperOffice, a checklist and the most frequent questions.

paperoffice.ai/downloads/paperoffice-ai-short-guide-branche-industrie.pdf



DATASHEETS

NETWORK SCANNER

Scans via SFTP into an inbox of their own, by connector into the workspace

CONNECTORS

Watch folders, the Scanner Endpoint and mailboxes

CLASSIFICATION

Document types, your own types and an agent per type

IDP AGENT

Read fields and tables, every value with its source

AI-OCR

Text from scans and photos, handwriting with Ultra

SMART SEARCH

Find numbers and terms in text, OCR and entities

WORKSPACES

Types, access protection and group rights

DOCUMENT CHAT

Questions across workspaces, answers with documents

All datasheets and guides are available at paperoffice.ai/downloads. Scan the QR code with your phone camera or open the link.

16 · YOUR FIRST RESULT IN FIVE DAYS

Start with one supplier. Then add the next.

To get started, you need one supplier who delivers often and prints your order number cleanly, and the documents of one week.



1

Day 1 · Workspace and types

Create the workspace "Goods Receipt Plant 1": type Department, Business, AI-DMS Premium. Add your own type for mill certificates.

2

Day 2 · Inboxes

Set up the Scanner Endpoint at the gate, a connector into the workspace and a connector on purchasing's mailbox; send a test scan.

3

Day 3 · Agents

Create the three templates with a Premium tier, test them on documents from three suppliers and bind them to the document types; the binding applies to the whole account.

4

Day 4 · Match

File one week of orders, delivery notes and invoices, group by purchase order reference and compare with your previous checks.

5

Day 5 · Review routine

Decide who looks at "Variance" daily, who decides and how the fields reach the ERP. Practice searching for a batch.

MEASURE THESE FOUR VALUES

Documents at the gate

Delivery notes per day that arrive in the workspace through the scanner

Match OK

Share of purchase order references that show "Match OK" without rework

Causes

Variances per week by quantity, price, unit or reference

Time to decision

Time from goods receipt to the decision on a variance

17 · CHECKLIST AND START

Before you expand.

- ☐ Orders, delivery notes and invoices of one plant sit in one workspace with AI-DMS Premium.
- ☐ The gate scanner is set up as a Scanner Endpoint, and a connector brings the scans into the workspace.
- ☐ The three agents are created with a Premium tier, tested and bound to the document types.
- ☐ Your suppliers copy your order number unchanged onto delivery note and invoice.
- ☐ Item number and unit of measure are the same on order, delivery note and invoice.
- ☐ It is settled who decides on which variance.
- ☐ Drawings sit in a separate workspace with group rights.
- ☐ A run with the test package has been completed.

GET STARTED NOW

Create your account, set up the goods-receipt workspace and upload the test package.
Costs follow usage, and the pricing page lists the prices.

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

Industry and manufacturing: goods receipt, batches and the match with the order at a glance.
paperoffice.ai/en/solutions/industry/ai-manufacturing-production-document-automation

**QUESTIONS ABOUT THIS GUIDE?**

Please contact us if you have questions about setup or your suppliers.

paperoffice.ai/en/contact

As of October 2026. Screenshots are from a test account. All examples, company names, personal names, numbers, bank details and values in this guide are fictional.
PaperOffice, paperoffice.ai.