

Searching four places for every tenant question? **Now every property lives in one Workspace.**

Leases, notices, utility and contractor invoices, handover reports. This guide shows how PaperOffice files the documents of your buildings per property, reads them and makes them easy to ask about, and how the tenant signs the report on site on a smartphone.

TRY IT YOURSELF IN 45 MINUTES

One building in eight files: two leases from different decades, a notice of termination, an electricity bill, a contractor invoice that arrived twice, a handover report and an energy certificate. Includes a test package to follow along.

WHY THIS GUIDE

The answer is in the lease. The lease is somewhere.

A tenant asks about the deposit, accounting asks for the meter reading, the owner asks for the report from the last handover. The answers are in the documents. Finding them is what takes the time.



In many property management offices, the documents of one building sit in four places: in a binder, in an inbox, on a shared drive and on the caretaker's phone. Whoever needs to answer a question first searches, then retypes.

This guide shows how PaperOffice brings order to that: one Workspace per property, several ways in, rent details and meter readings as fields, and answers that point to the lease. Every step comes with a click path and a screenshot from the app. With our test package, you can try it yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice

WHO THIS IS FOR

Property management

You manage rental buildings and condominium associations and need every document filed with the right building.

Landlords and portfolios

You rent out your own apartments and want lease details without retyping them.

Caretakers and field staff

You are on site for handovers and meter readings and send reports and photos to the office.

WHAT YOU CAN DO AFTERWARDS

Create one Workspace per property, bring in mail, emails and photos, have leases and electricity bills read as fields, spot duplicate invoices, ask questions about your portfolio, have handover reports signed on site and send redacted copies securely.

OVERVIEW

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AT A GLANCE

- Every building gets a Workspace of type "Property", with its address, rights per user group and, if you wish, access protection.
- Mail comes in by scanner or upload, emails through a connector, photos and reports from appointments through the Mobile App.
- AI-DMS picks the type from the catalog, such as lease, notice of termination or handover report, and points out possible duplicates.
- An IDP Agent reads base rent, deposit and lease start, and the "Utility Bill" template reads meter number and meter readings.
- The tenant signs the handover report on their own smartphone. Your property management software receives the data by export, API or webhook.

01 · MONDAY AT THE PROPERTY MANAGEMENT OFFICE

One call, one question. And four places to look.

Monday, 8:40 a.m. Markus Feldmann manages the building at Ahornweg 12 with twelve apartments for Hausverwaltung Kranich GmbH. On the phone is Lukas Brandt from unit 3. He has given notice for October 31 and asks about his deposit and the date of the move-out inspection.



The 2019 lease is in a binder in the records room, the notice is in the office inbox. On the desk lies the annual bill from Stadtwerke Talstadt for the common-area electricity, whose meter readings Jan Wolter from accounting needs.

The invoice from Haustechnik Brehm for the bathroom in unit 7 came by mail and by email. On Friday, caretaker Petra Sommer hands over the apartment, with the report on paper and the photos on her phone. And the owner wants to show the leases to a prospective buyer, without the tenants' personal data.

THE REAL HURDLE

Each of these questions is answered quickly once all documents of the building sit in one place and have been read. Until then, most of the time goes into searching and retyping.

02 · WHAT HOLDS UP PROPERTY DOCUMENTS

Four time sinks. Each one small on its own.

Hardly any document is difficult. The time goes into the fact that they arrive through many channels, look different from every sender and first have to find their way to the right building.

Many places

Binders, inbox, shared drive and phone, sorted by sender rather than by property. Which building a document belongs to is stated only in the document itself.

Every lease is different

Old standard leases, association forms, your own templates. Base rent is called one thing here and another there, and it sits in a different place every time.

Duplicate arrivals

Contractors send their invoice by mail and by email. Whoever approves it does not see that the same invoice has already arrived once.

Appointments on site

Handovers and meter readings take place in empty apartments and basements. The report is on paper, the photos are on a phone.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Many places	One Workspace per property, intake by scanner, upload, email connector and Mobile App	8 files, one Workspace "Objekt Ahornweg 12"
Every lease is different	IDP Agent with fields in your own words, source location for every value	Leases from 2004 and 2019, one with "Grundmiete", one with "Nettokaltmiete"
Duplicate arrivals	"Possible Duplicate" notice from AI-DMS Premium, with its reason	Invoice HB-26-1187 as a scan and as the PDF from the email
Appointments on site	Mobile App with batch scanning, tenant signature by SMS link	Handover report for unit 3 with an empty signature field

The test package contains invented documents of an apartment building. Chapter 14 shows how to work through it.

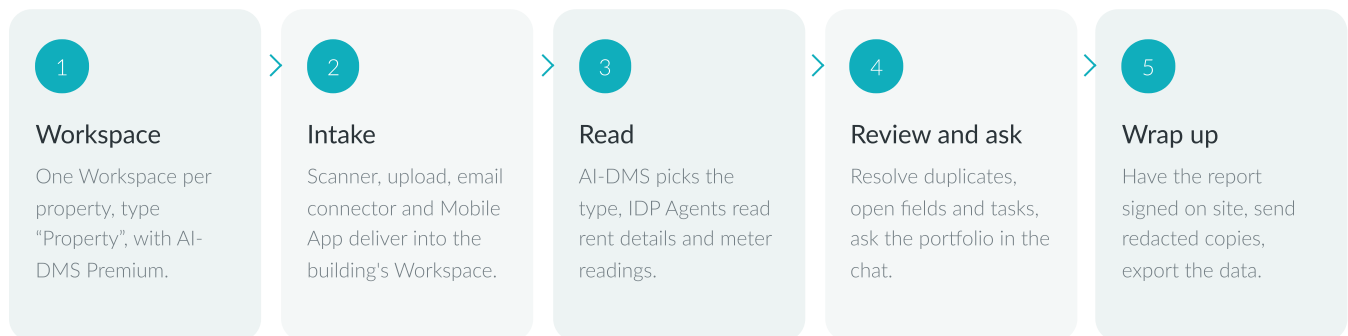
WHAT REMAINS IN YOUR HANDS

Rent accounting, the operating cost statement, the legal assessment of notices and deadlines, and the decision about what gets paid. PaperOffice files the documents, reads them and shows what stands out.

03 · THE PROCESS AT A GLANCE

Five stages. From the mailbox to the handover.

Every document follows the same path, whether it is scanned, emailed or photographed in the apartment.



STAGE	WHAT PAPEROFFICE DOES	WHAT YOUR OFFICE DECIDES
Workspace	creates the property with type, address and rights	one per building, per economic unit or per owners' association
Intake	accepts scans, files, email attachments and photos	which channels each property uses
Read	type, sender, amounts, rent details, meter readings	which fields every lease should deliver
Review	shows duplicates, open fields and tasks	who reviews and who approves invoices
Wrap up	signature by SMS link, redacted copy, export	what goes to owners and to your software



04 · ONE WORKSPACE PER PROPERTY

One building, one Workspace. With address and rights.

Under **Document AI** > **Workspaces**, click **Create New Workspace**. On the **General** tab, choose the type "Property" from the "Real Estate" group.

- 1 **Create.** Name "Objekt Ahornweg 12", type "Property". The same group offers Residential Unit, Commercial Unit, Land / Plot, Tenant and Owner.

Workspace type Business

Unlocks details, the trash and access protection: a password or SMS code on opening.

AI-DMS Premium

Choose Premium on the "AI-DMS" tab. This level reads sender, recipient and amounts and points out possible duplicates.

Details

The building's address, "Reference No. / File Number" for your property number, "Responsible" and tags.

USER GROUP	RIGHT (USER GROUPS › WORKSPACES)	FOR
Management	Full access	property management, leases, sharing
Caretakers	View + Download + Upload	reports and photos from appointments
Accounting	View + Download	invoices, meter readings, export

FOLDERS AS A FILING AID

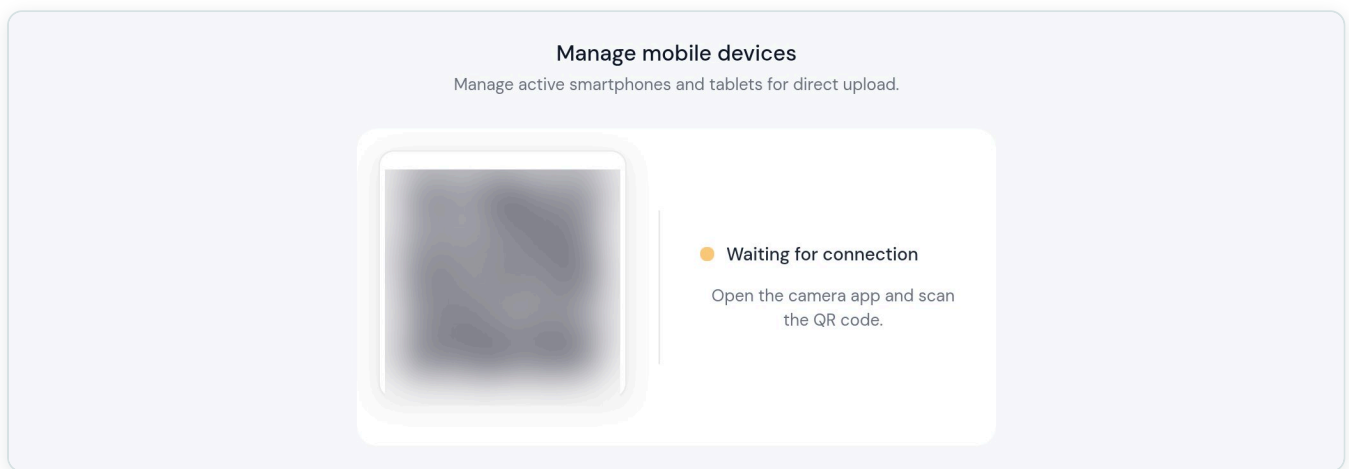
Group the documents of one apartment into a folder inside the Workspace, such as "WE 03": select them, then

Actions > **Document folder** > **New Folder**.

05 · MAIL, EMAIL AND SMARTPHONE

Four ways in. All into the building's Workspace.

In the Workspace, click **Add document**. Next to the “File” tab you will find “Mobile devices” and “Scanner”. Emails are picked up from the mailbox by a connector.



- 1 **“Mobile devices” tab.** One tab per channel. Here, paired smartphones and tablets upload straight into this Workspace; to pair one, scan the QR code with the camera app.

Mail by scanner

Set up a Scanner Endpoint once (SFTP or Legacy FTP) and enter /inbox as the target folder on the device. New scans appear on the “Scanner” tab.

Emails by connector

Add a mailbox, for example for contractor invoices, as a Storage Mount (IMAP). Under Document AI > Connectors, a connector brings it into the target Workspace, with attachments as separate documents.

Pair the smartphone

In the Security Center, click “Add mobile device”, choose the “Connection Validity” and scan the QR code with the phone's camera app.

Scan on site

In “Batch” mode, the app captures a report page by page, with the flash even in a dark basement. Before sending, you select the Workspace.

NO SIGNAL IN THE BASEMENT?

The Mobile App stores the scan on the device and uploads it automatically as soon as the connection is back.

06 · WHAT PAPEROFFICE RECOGNIZES

Every document with a type. Duplicates stand out.

With AI-DMS, every document gets a type, a descriptive name, a summary and keywords. From Premium on, it reads sender, recipient and amounts.

Objekt Ahornweg 12

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 HB-26-1187 Hausverwaltung Kranich GmbH 2026-10-06.pdf	Invoice	Haustechnik Brehm GmbH	10/21/26	473.03 EUR	-	1
2	Energy Performance Certificate TS-2024-004471 Energieberatung Reuter 2024-03-15.pdf	Energy Performance Certificate	Energieberatung Reuter	10/21/26		-	2
3	Handover Lukas Brandt 2026-10-30.pdf	Handover / Acceptance Report	Hausverwaltung Kranich GmbH	10/21/26		-	2
4	Invoice HB-26-1187 Haustechnik Brehm GmbH 2026-10-06.pdf	Invoice	Haustechnik Brehm GmbH	10/21/26	473.03 EUR	Received	1
5	Utility 2026-0126-87552 Grundbesitz Ahornweg GbR 2026-01-26.pdf	Utility / Service Charge Statement	Stadtwerke Talstadt GmbH	10/21/26	92.44 EUR	-	2
6	Termination Notice Hausverwaltung Kranich GmbH 2026-07-28.pdf	Termination Notice	Lukas Brandt	10/21/26		Received	1
7	Lease Agreement AH12-WEO3 Lukas Brandt 2019-03-08.pdf	Lease Agreement	Grundbesitz Ahornweg GbR	10/21/26	1,060.00 EUR	-	4
8	Lease Agreement Grundbesitz Ahornweg GbR 2004-08-12.pdf	Lease Agreement	Grundbesitz Ahornweg GbR	10/21/26	575.00 EUR	Final	3

- The Workspace after the upload, here in the "Table" view (Options): every row with name, type and sender. If needed, you change the type on the document's "Properties" tab.

FILE IN THE TEST PACKAGE	MATCHING TYPE IN THE CATALOG
Leases for units 1 and 3	Lease Agreement
Notice for unit 3	Termination Notice
Annual common-area electricity bill	Utility / Service Charge Statement
Haustechnik Brehm invoice (twice)	Invoice
Handover report unit 3, energy certificate	Handover / Acceptance Report, Energy Performance Certificate

Workspace Download Open Share Hyperlink Sign Versions Automation history

Possible Duplicate This document likely already exists: "Rechnung_HB-26-1187_Brehm_Scan.pdf" in "Objekt Ahornweg 12" from 10/21/2026.

Same Document Number

Same Issuer

Same Amount

Open Original

Not a duplicate

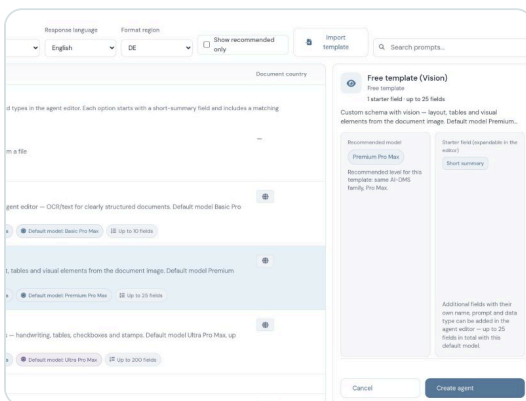
Overview Properties Data Fields Storage Paths Activities Audit Revisions

- Possible Duplicate.** Below the action bar, the second invoice HB-26-1187 shows the notice with its reason, such as "Same Document Number" and "Same Issuer", plus "Open Original". The check covers all Workspaces you are allowed to see.

07 · HAVING LEASES READ

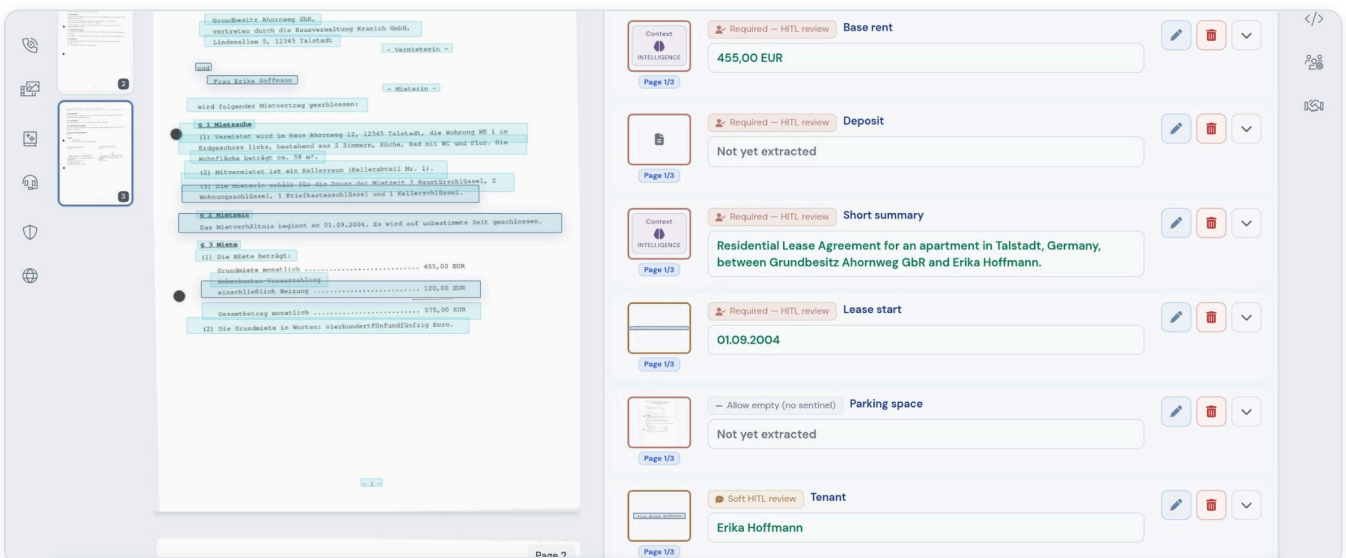
Your fields, in your words. Even from old templates.

Select the 2004 lease, then **Actions** > **Agents & workflows** > **IDP** and “Create new agent”. In the catalog, pick “Free template (Vision)” and click “Create agent”.



Add the fields

In the agent editor, use “New field” to add a label, field type and prompt for each field: unit, tenant, lease start, base rent (also “Grundmiete”), advances for operating and heating costs, deposit (also “Mietsicherheit”), tenant's notice period, parking space. “Free template (Vision)” holds up to 25 fields, and no training is required.



1 **Test run on the 2004 lease.** “Start full test run” shows the value, page and rule for each field, and the preview on the left marks the passages read. In the old template, base rent appears as “Grundmiete”: read as 455,00. Deposit and parking space stay empty.

1 **Define each field:** “Field label”, a “Field type” such as date or currency, and the prompt.

2 **Rule for missing values:** under “Behavior when value is missing”, choose “Required — HITL review” for base rent, deposit and lease start, and “Allow empty (no sentinel)” for the parking space.

3 **Save and apply:** “Save and close”. Then apply it to both leases with “Apply Agent” on the “Data Fields” tab, which also checks it on the 2019 lease.

08 · UTILITY BILLS AND METER READINGS

Meter readings from the bill. With a ready-made template.

Select the bill, then [Actions](#) > [Agents & workflows](#) > [IDP](#) and “Create new agent”. Search the catalog for “Utility Bill” and click “Create agent”. The template comes with 25 fields.

Stadtwerke Talstadt GmbH · Werkstraße 2 · 12345 Talstadt

Rechnungsdatum: 26.01.2026
Kundennummer: 40 1187 552
Rechnungsnummer: 2026-0126-87552
Fällig am: 16.02.2026
Kundenservice: 030 23125 300

Jahresrechnung Strom 2025

Verbrauchsstelle: Ahornweg 12, 12345 Talstadt
Sparte: Strom
Tarif: Talstrom Basis
Abrechnungszeitraum: 01.01.2025 bis 31.12.2025

Zählerstände und Verbrauch

Zählernummer	Ablesung	Alter Zählerstand	Neuer Zählerstand	Verbrauch
1TAL0047 1182	31.12.2024 · 31.12.2025	18.402	21.317	2.915 kWh

Ihre Rechnung

Position	Berechnung	Betrag
Grundpreis 01.01.2025 bis 31.12.2025	12 Monate x 11,90 EUR	142,80 EUR
Arbeitspreis	2.915 kWh x 0,2890 EUR/kWh	842,44 EUR
Summe netto		985,24 EUR
Umsatzsteuer 19 %		187,20 EUR
Rechnungsbetrag brutto		1.172,44 EUR
abzüglich geleisteter Abschläge (12 x 90,00 EUR)		— 1.080,00 EUR
Zu zahlender Betrag		92,44 EUR

Bitte überweisen Sie den Betrag von **92,44 EUR** bis zum **16.02.2026** auf unser Konto IBAN DE23 0000 0000 0040 1187 55 (DEMO) und geben Sie Ihre Kundennummer 40 1187 552 an.
Ihren Verbrauchsvergleich zum Vorjahr und Ihre Abschläge für 2026 finden Sie auf Seite 2.

Meter number: 1TAL0047 1182

Payments received: 1080

Previous balance: VALUE_MISSING

Previous reading: 18.402

Rate plan: Talstrom Basis

Service address: Ahornweg 12, 12345 Talstadt

- The electricity bill from the test package after “Apply Agent” on the “Data Fields” tab: the bill on the left, the values on the right, most with the snippet they were read from. If a required value is missing, it shows VALUE_MISSING.

TEMPLATE FIELD	ON THE TEST BILL
Utility company · Service address	Stadtwerke Talstadt GmbH · Ahornweg 12, common-area electricity
Meter number	1TAL0047 1182
Previous reading · Current reading	18,402 · 21,317
Usage · Unit	2,915 · kWh
Service period start · end	01/01/2025 · 12/31/2025

Adjust the field list

Fields you do not need, such as demand charge or average daily usage, you take out in the agent editor with “Remove field”.

Automatic per document type

Under [Document AI](#) > [Document Types](#), open the type and choose the agent on the “Default IDP Agent” tab. Whenever AI-DMS recognizes the type, it runs as well, for leases too.

09 · REVIEWING WHAT STANDS OUT

What is open is marked. So is who is responsible.

Three places show your team what needs doing: the “Possible Duplicate” notice, the “IDP Review” view and tasks on the document.

The screenshot shows a document titled "Kündigung meines Mietverhältnisses Ahornweg 12, WE 3, 1. OG rechts" with a signature of Lukas Brandt. To the right, a task creation form is visible. The form includes a text area with "Prepare move-out inspection for unit 3", a checked box for "Completion required (create task)", a deadline of "10/30/2026", a priority of "High", and a selection of "Caretakers" as the responsible group. There is also a checkbox for "Deadline reminder (paid)".

- 1 **A task on the notice.** On the “Activities” tab, click “New” (Create note or task): content “Prepare move-out inspection for unit 3”, check “Completion required (create task)”, deadline 10/30/2026, priority “High”, “Who must complete this?” the Caretakers group. The pre-checked “Deadline reminder (paid)” reminds before the deadline and when it is reached; uncheck it if you do not want it.

DOCUMENT	DOCUMENT TYPE	KEYWORDS	DOCUMENT STATUS	ADDED	AUTOMATION
Lease Agreement Grundbesitz Ahornweg GbR 2... Lease Agreement for Residential Premises This document is a lease agreement for residential premises signed by the landlord, Grundbesitz Ahornweg GbR, and the tenant, Erika Hoffmann. The contract covers an apartment in Talstadt with a monthly rent of...	Lease Agreement	Lease Agreement Grundbesitz Ahornweg G... Erika Hoffmann Hausverwaltung ... +4	Final	59 minutes ago 10/21/2026, 03:04 PM	AI-DMS Premium AI-DMS Premium IDP
Utility 2026-0126-87552 Grundbesitz Ahornwe...	Utility / Service Charge Statement	Stadtwerke Talstadt		59 minutes ago	AI-DMS Premium

- 2 **“IDP Review” view.** Under **Options** → **IDP Review**, it shows documents with missing or incomplete IDP fields, such as the 2004 lease, whose deposit is stated in an annex. In the test, the 2019 lease was listed too: its “Short summary” starter field stayed empty.

Resolve duplicates

Compare with “Open Original”. If it is not a duplicate, “Not a duplicate” hides the notice.

Close tasks

Responsibility goes to you, a user or a group. “Mark as completed” closes the task.

Notice periods

The lease agent reads the notice period as a field with its source location. You assess the date yourself and record it as a task.

10 · ASKING ABOUT YOUR PORTFOLIO

Questions in your own words. Answers with the lease.

At the top of the app, click **Ask Agent** or press Alt+A. The **Agent context** lists the Workspace you ask from as a source, and below it the documents behind the answer.

WORKSPACES

01 Objekt Ahornweg 12 ×
8

THIS ANSWER

02 Kuendigung_WEO3_Brandt.pdf +
Termination Notice · Objekt Ahornweg 12

03 Mietvertrag_WEO3_Brandt_2019.pdf +
Lease Agreement · Objekt Ahornweg 12

04 Mietvertrag_WEO1_Hoffmann_2004.pdf +
Lease Agreement · Objekt Ahornweg 12

As of when has unit 3 (WE 3) been terminated, and what deposit does the WE 3 lease state?

Termination takes effect October 31, 2026: tenant Lukas Brandt's notice (Kuendigung_WEO3_Brandt.pdf, dated 28 July 2026, received 29 July 2026) ends the tenancy for WE 3, 1st floor right, on that date. The lease (Mietvertrag_WEO3_Brandt_2019.pdf, dated 08.03.2019) states a deposit of 2,340.00 EUR — three net cold rents — payable in three equal monthly installments into the landlord's deposit account IBAN DE02 1203 0000 2020 51. Brandt has asked for the deposit back after settlement to his account ending 0750 30. Shall I pull up the handover details or draft a confirmation of receipt?

QShow in Workspace: brandt

- 1 A question about unit 3. "As of when has unit 3 (WE 3) been terminated, and what deposit does the WE 3 lease state?" Answer: October 31, 2026, plus the deposit from the 2019 lease. Name the document that counts: asked "When does the tenancy end?", the agent answered from the lease only (indefinite term) in the test.

Typical questions

"Which leases at Ahornweg 12 include a parking space?" ·
"Which defects does the handover report for unit 3 list?" ·
"Which leases in the portfolio have stepped rent?"

Ask about selected documents

Select two leases, then **Actions** >
Agents & workflows > **Ask Agent**, for example to compare them.

Hits in the list

Below the answer, the chat offers to set the document list to the hits. One click, and the list shows exactly these documents.

What is searched

Everything AI-DMS has processed, in the Workspaces you are allowed to open. The Agent context shows which sources the answer uses.

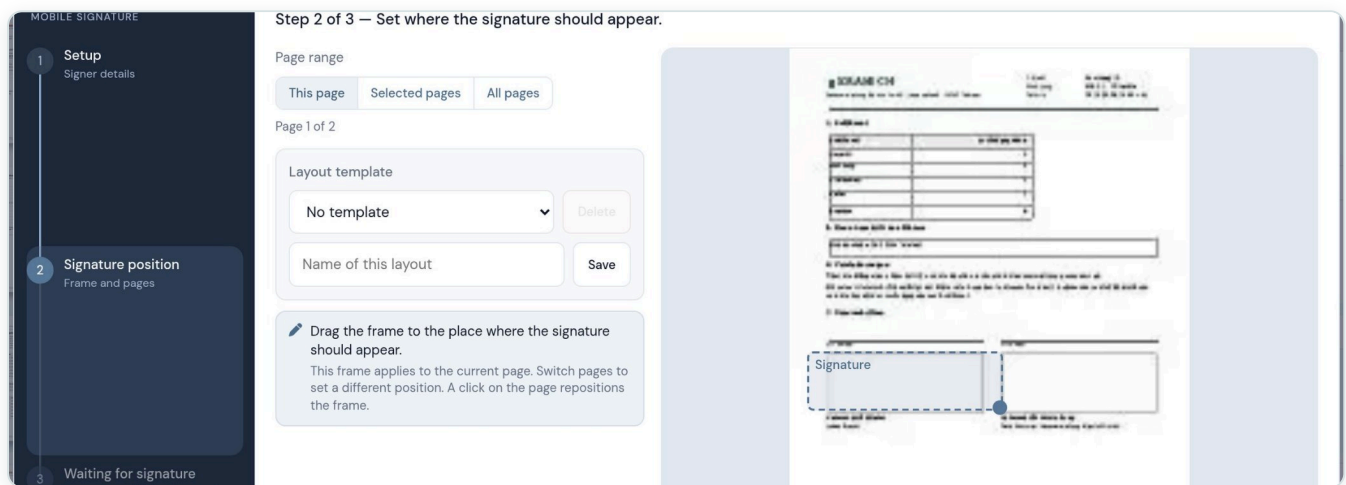
CHECK EVERY FIGURE IN THE ORIGINAL

An answer is a starting point. Before you quote an amount to a tenant, open the lease with one click and check the passage.

11 · SIGNING THE HANDOVER ON SITE

Signed at the appointment. On the tenant's own phone.

Select the prepared handover report, then **Actions** > **Signature** > **Sign on smartphone** . The dialog leads to the signature in three steps.



1 Signature position. Drag the frame over the tenant's signature field on page 2. Saved as a "Layout template", you load it again for the next report.

- 1 Setup:** "Signer name", "Role (optional)", "Signer mobile number" and "Signer language". The SMS and the signing page appear in this language.
- 2 Signature position:** place the frame and choose the "Page range", for example "This page".
- 3 Waiting for signature:** "Start signing via SMS". The tenant opens the link in the browser, with no app to install, and signs with a finger. The dialog stays open until the signature is in.

Signature and proof

A simple electronic signature (SES) under eIDAS. Whoever opens the SMS link counts as verified. The certificate shows mobile number, time, IP address, device and a timestamp under RFC 3161.

Get the result

Under **Actions** > **Signature** > **View status** , download the signed PDF and the certificate. Photos from the appointment go into the same Workspace through the Mobile App.

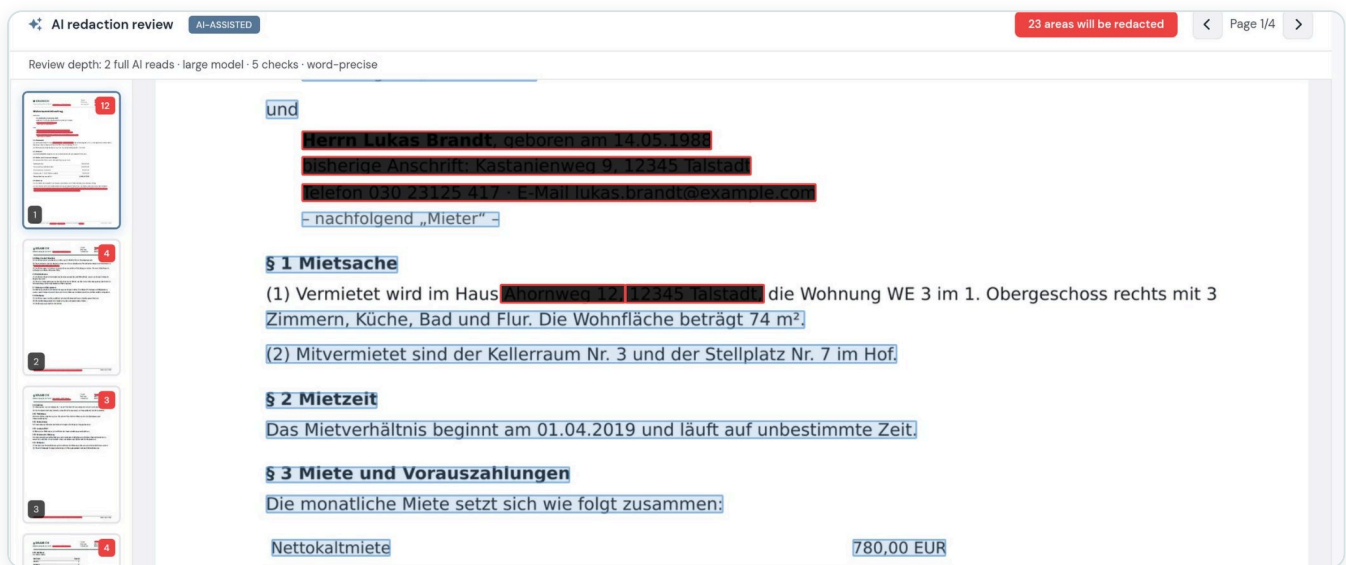
LEASES HAVE FORM REQUIREMENTS

This guide shows Sign for handover reports. Clarify with your legal advisor what form a lease requires.

12 · SHARING AND HANDING OVER

Redacted for outsiders. As data for your software.

Your property management software remains the system for rents and statements. PaperOffice delivers documents and extracted fields to it, and outsiders receive a redacted copy.



- 1 **“External Sharing” profile.** In the test, the AI redacted the tenant's data including the IBAN, plus the building's address; rent and amounts stayed visible. In the preview, you click areas or draw a rectangle.
- 1 **Redact:** Actions > Agents & workflows > Redact , “Edit with preview”, then “Apply redaction”. The copy is saved as a new document in the Workspace, and the original stays unchanged.
- 2 **Send:** “Send by email” opens the delivery dialog with the copy. Choose “PDF password by SMS” and “Send now”. The delivery history shows when the link was opened and the file downloaded.

PATH	HOW IT WORKS	IDEAL FOR
Export data	Actions > Share & export > “Export data”, “Data only” as XLSX, CSV or JSON	rents and meter readings for your software
REST API	start an IDP Agent with POST /documents/idp-agent-run and fetch the fields, with an API key	a fixed integration
Webhook	“document.processed” notification as soon as a document is ready	automatic handover
MCP	AI assistants ask about the portfolio, with the rights of the connected key	questions from your own assistant

Seven questions before your first property.

**Does PaperOffice replace our property management software?**

No. Rents, accounting and the operating cost statement stay there. PaperOffice files the documents per property, reads them and delivers the fields by export, REST API or webhook.

Does PaperOffice cope with old lease templates?

An IDP Agent reads your fields by content, labels and context. Test it on leases from several decades, as in the test package with "Grundmiete" and "Nettokaltmiete".

How do we record notice periods?

The agent reads lease start and notice period as fields with their source location. On the "Activities" tab, you add a task with deadline and assignee, optionally with "Deadline reminder (paid)". The legal assessment stays with you.

What happens to contractor invoices that arrive twice?

With AI-DMS Premium, PaperOffice checks whether the content or the issuer's document number already exists in the account. A match appears as "Possible Duplicate" with its reason. You decide before anything is paid.

What kind of signature does the handover report get?

A simple electronic signature (SES) under eIDAS, by SMS link on the tenant's smartphone. Clarify with your legal advisor what form a lease requires.

Who sees which property documents?

Rights apply per user group and Workspace: View + Download, plus Upload or Full access. Business Workspaces can ask for a password or SMS code on opening, and deleted documents go to the trash.

What does it cost?

Billing is based on usage, depending on the level. The pricing page has the details: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Work through one building.

Eight invented German documents of the building at Ahornweg 12 show the whole path: from intake to the tenant's signature.

TEST PACKAGE REAL ESTATE AND PROPERTY MANAGEMENT

Eight files and a guide (README.txt)

Mietvertrag_WE01_Hoffmann_2004.pdf old template, deposit in an annex
 Mietvertrag_WE03_Brandt_2019.pdf base rent, parking space, deposit
 Kuendigung_WE03_Brandt.pdf notice for October 31, 2026
 Stadtwerke_Talstadt_Allgemeinstrom_2025.pdf annual bill with meter readings
 Rechnung_HB-26-1187_Brehm_Scan.pdf · ..._Mail.pdf the same invoice twice
 Uebergabeprotokoll_WE03.pdf two pages, signature field empty
 Energieausweis_Ahornweg12.pdf energy certificate based on consumption
paperoffice.ai/downloads/paperoffice-ai-test-package-real-estate.zip



- 1 **Create the Workspace:** at app.paperoffice.ai, "Objekt Ahornweg 12", type "Property", Business, AI-DMS Premium (Chapter 04).
- 2 **Upload:** all eight files via "Add document", the Brehm invoice first as the scan, then as the PDF from the email (Chapter 05).
- 3 **Lease agent:** create it from the 2004 lease with "Free template (Vision)", test it, save it, apply it to both leases (Chapter 07).
- 4 **Electricity bill:** create and apply the "Utility Bill" template (Chapter 08).
- 5 **Review and ask:** open the second Brehm invoice, add a task to the notice (uncheck the pre-checked "Deadline reminder (paid)" if you do not want it), ask the chat about unit 3 (Chapters 09, 10).
- 6 **Sign and share:** send the report to your own phone with "Sign on smartphone", redact the lease for unit 3 (Chapters 11 and 12).

FILE	WHAT TO LOOK FOR
Leases	base rent even for "Grundmiete"; unit 1 without a deposit shows up in "IDP Review"
Electricity bill	meter number, previous and current reading, usage in kWh
Brehm invoice	"Possible Duplicate" notice on the second arrival, with its reason
Handover report	signed PDF and certificate under "View status"

All companies, names, addresses, meter 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

Every module in detail. And the overview for your team.

The datasheets describe every module from this guide with features, click paths and technical data. The short guide sums up the topic in eight pages.

SHORT GUIDE · 8 PAGES

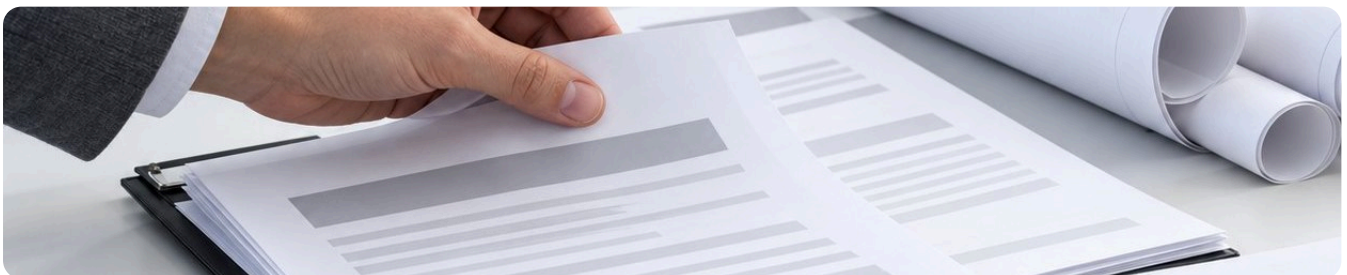
Real estate and property management

To pass on to colleagues and owners: the problem, the path with PaperOffice, an example, a checklist and frequent questions.

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



DATASHEET	INSIDE	DOWNLOAD
Workspaces	types, AI-DMS level, access protection, rights	...-datasheet-workspaces.pdf
Network Scanner	SFTP intake, target folder /inbox	...-datasheet-integration-network-scanner.pdf
Mobile App	pairing, batch scanning, offline queue	...-datasheet-mobile-app.pdf
Classification	document types, default IDP Agent	...-datasheet-classification.pdf
IDP Agent	fields, rules, test run, templates	...-datasheet-idp-intelligent-document-processing.pdf
Document Chat	search scope, sources, hits in the list	...-datasheet-document-chat.pdf
PaperOffice Sign	SES, on-site signing, certificate	...-datasheet-esignature.pdf
Secure email delivery	link with password, delivery history, proof	...-datasheet-audit-safe-email-delivery.pdf



16 · YOUR FIRST PROPERTY IN FIVE DAYS

Start with one building. Then add each next one.

To get started, you need one building with a mixed set of documents, the documents of one quarter and an upcoming handover.

1

Day 1 · Workspace and rights

Create "Objekt ...": type "Property", Business, AI-DMS Premium, address and property number. Define user groups and a naming scheme for all buildings.

2

Day 2 · Intake

Set up the Scanner Endpoint, connect the mailbox for contractor invoices with a connector, pair the smartphones of caretakers and field staff.

3

Day 3 · Lease agent

Agree on the fields with management and accounting, check the agent with "Apply Agent" on three leases from different decades and set it on the "Lease Agreement" type.

4

Day 4 · Utility bills

Create the "Utility Bill" template, adjust the field list and output the meter readings for your software as XLSX or CSV with "Export data".

5

Day 5 · Review routine and handover

Decide who looks at duplicates, "IDP Review" and tasks. Complete the next handover with "Sign on smartphone".

MEASURE THESE FOUR VALUES

Documents

documents per building and month arriving in the Workspace

No rework

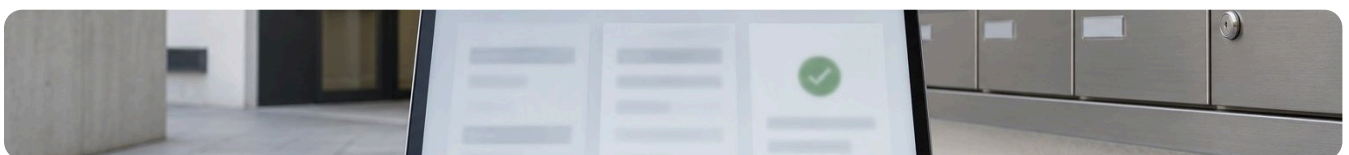
share of leases that do not show up in "IDP Review"

Response time

time from the call to the answer with the passage in the lease

Duplicates

"Possible Duplicate" notices on invoices per month



Measure the first building precisely. Only the comparison with the buildings that follow shows how much searching and retyping goes away.

17 · CHECKLIST AND START

Before you expand.

- ☐ It is decided whether you create one Workspace per building, per economic unit or per owners' association.
- ☐ Every property has a Workspace of type "Property" with address and property number.
- ☐ For each Workspace it is set which user group may view, upload or do everything.
- ☐ Scanner, mailbox and smartphones deliver into the right Workspace.
- ☐ The lease agent has been tested on leases from several decades and is set on the "Lease Agreement" type.
- ☐ Utility bills run on the "Utility Bill" template, and the meter readings go out as an export.
- ☐ Whoever approves contractor invoices looks for the "Possible Duplicate" notice on the document.
- ☐ For notice periods, there is a task with deadline and assignee on the lease.
- ☐ Handover reports have a saved layout template for the signature.
- ☐ A run with the test package has been completed.

GET STARTED NOW

Create your account, set up your first property Workspace and upload the test package.
Billing is based on usage; the pricing page lists the levels.

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

Real estate and property management: all building blocks on one page.

paperoffice.ai/en/solutions/industry/ai-real-estate-property-document-automation

**QUESTIONS ABOUT THIS GUIDE?**

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

paperoffice.ai/en/contact

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