

Typing up figures for the monthly report?

From now on, the values arrive as a finished table.

Amounts, due dates, suppliers and cost centers are already in your invoices. This guide shows step by step how PaperOffice reads these values as fields during processing, shows amounts in the Table view and on the Timeline, and hands all values to your analysis tool as an export or via API.



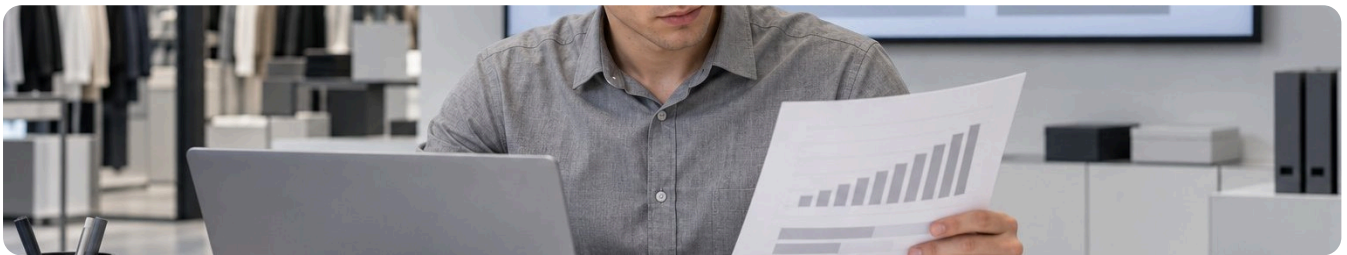
TRY IT YOURSELF IN 45 MINUTES

One reporting month in eight invoices: seven suppliers, two months, euros and dollars, and one invoice without a cost center. Includes a test package to follow along.

WHY THIS GUIDE

The report is built quickly. The typing before it takes hours.

Every figure for the monthly report is already in a document. Before anyone can analyze it, someone else copies the values by hand.



In many controlling teams, the monthly report starts with typing. Amounts, dates and cost centers move from PDF invoices into a spreadsheet, totals are recalculated, and every question starts a search for the source document.

This guide shows how PaperOffice takes over this work: AI-DMS reads the standard fields, an IDP Agent reads your own key values, the Table view and the Timeline show amounts per document and per month, and the export and the REST API pass all values on. With our test package, you can try the whole path yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice

WHO THIS IS FOR

Controlling

You build monthly reports and want to check values instead of typing them.

Accounting

You process the invoices and deliver the figures for the report.

Management

You read the report and want to know where a figure comes from.

WHAT YOU CAN DO AFTERWARD

Set up a Workspace for the report documents, read your own key values such as the cost center with an IDP Agent, check values against the source, filter the reporting month, count and total per month on the Timeline, export as XLSX, CSV, JSON or PDF, and fetch totals via the REST API.

OVERVIEW

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AT A GLANCE

- AI-DMS Premium reads type, sender, amounts, currency, document number and date fields such as invoice date and due date.
- Your own key values, such as cost center or project, are read by an IDP Agent, each value with its source location in the document.
- The Table view shows documents in Excel style, and the Timeline counts and totals per day, week or month.
- The export delivers the selected fields as XLSX, CSV, JSON or PDF, with the document ID as the way back to the source.
- Financial Analytics returns totals per currency and items due before today via the REST API and MCP.

01 · THE MONTHLY REPORT AT NIGHT

Eight invoices, one report. And the meeting is tomorrow morning.

Thursday, 7:40 p.m. Katrin Wessel, controller at Lindenhain Handels GmbH, is still working on the October report: incoming invoices per supplier and per cost center.



Lindenhain runs three stores and a warehouse. The invoices sit as PDFs in the mailbox and on the shared drive: lights for the Markt store, cleaning for the Hafen store, electricity for the head office, freight for the warehouse, office supplies, signage. One invoice comes from the US, in dollars.

For each invoice, she types amount, date, due date and cost center into her spreadsheet. One invoice has no cost center, so she asks purchasing. And the September total does not add up, because euros and dollars sit in one column.

THE REAL HURDLE

She can only start analyzing once every figure is in the spreadsheet and matches its source. Until then, the evening is gone.

02 · WHAT HOLDS REPORTS UP

Four time sinks. Each one small on its own.

Hardly any figure is hard to find. The time goes into capturing each one twice, reconciling it and, in the end, backing it up with its source.

Captured twice

The amount is on the invoice and gets typed again for the report. Every typo flows into the total.

Gaps show up late

An invoice without a cost center is noticed only when assigning it, usually at month end.

Totals across currencies

Euros and dollars in one column add up to a number nobody can explain.

The source gets lost

When management asks about a figure, the search for the document behind it begins.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Captured twice	AI-DMS Premium and an IDP Agent read the values during processing	8 invoices with amount, currency, dates and cost center
Gaps	Required field with HITL review, "IDP Review" view	Werbetechnik Sonnenhang invoice without a cost center
Totals across currencies	Monthly total when all amounts share one currency; Financial Analytics per currency	September with euros and dollars
Source	Source location for every value, Document ID (POFID) as an export field	every export row with its POFID

This is how the test package is built. Chapter 14 lists the values you can expect in your own run.

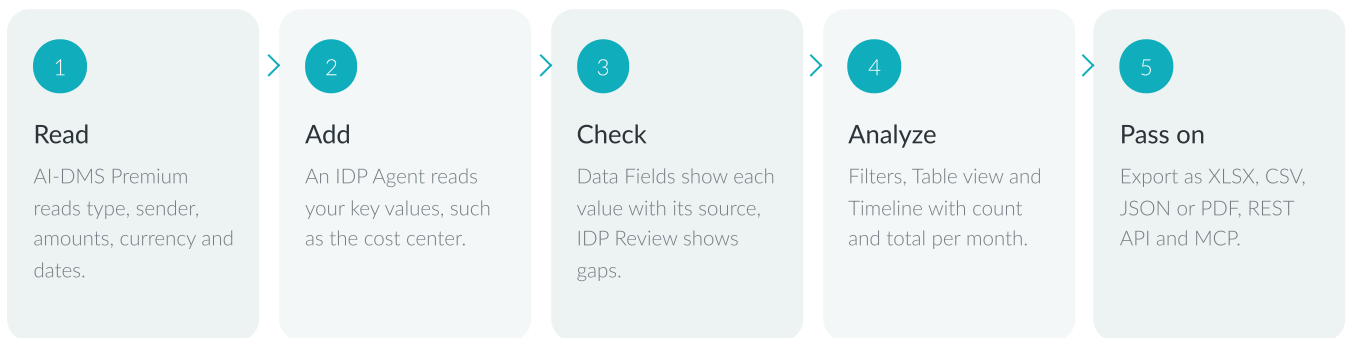
WHAT STAYS WITH YOU

Assessing the figures, posting them, and the report itself. PaperOffice reads the values and passes them on. Whether an invoice has been paid is in your accounting system.

03 · THE PROCESS AT A GLANCE

Five stations. From PDF to table.

Every invoice follows the same path, no matter which supplier sends it or how it is laid out.



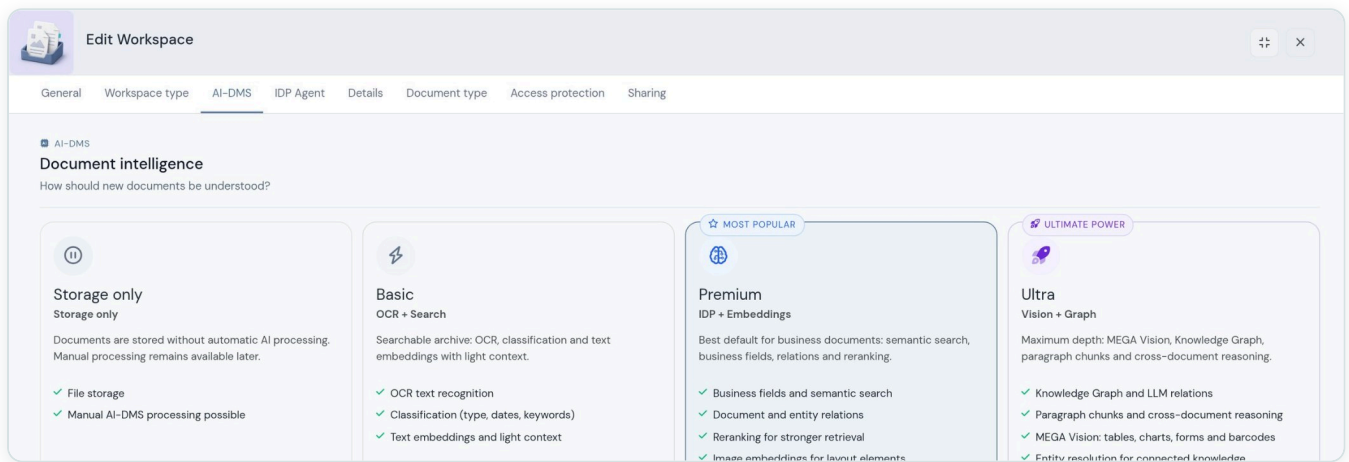
STATION	WHAT PAPEROFFICE DOES	WHAT YOU DECIDE
Read	reads the standard fields of every invoice	Workspace and AI-DMS level
Add	reads your own fields, each with its source	which key values, which keyname
Check	shows values, sources and missing fields	who reviews and when
Analyze	counts and totals per period	filters, date field and grouping
Pass on	delivers the table and the totals	format, fields and pull schedule



04 · A WORKSPACE FOR THE REPORT DOCUMENTS

One Workspace for the invoices. With AI-DMS Premium.

Put the documents you report on into their own Workspace, in the example “Incoming invoices Lindenhain”. Under [Edit Workspace](#) › [AI-DMS](#) , choose Premium.



- 1 **Level for new documents.** “How should new documents be understood?” Premium reads business fields such as amounts, numbers and dates. Documents already in the Workspace are processed via [Actions](#) › [Agents & workflows](#) › [AI-DMS](#) .

WHAT AI-DMS PREMIUM READS	WHAT IT IS FOR IN THE REPORT
Document type	separating invoices from other documents
Sender	reporting per supplier
Gross, net and tax amount, currency	totals, separated by currency
Document number	questions to the supplier
Invoice date and due date	reporting month and payment planning

One Workspace per report scope

Financial Analytics in the API counts every document with an amount in the selected Workspace. A Workspace of its own for invoices keeps the totals clean.

Rights per Workspace

The list, the export and the API show documents from the Workspaces someone has rights to.

Processing language

It determines the language in which type, summary and field values appear.

05 · YOUR OWN KEY VALUES: THE COST CENTER

Your key values as fields. Described in your own words.

Cost center, project or order number are on the invoice and belong in your report. An IDP Agent reads them. Select an invoice, then [Actions](#) > [Agents & workflows](#) > [IDP](#) , “Create new agent”.

- 1 **One field, four entries.** Field label “Cost center”, keyname “cost_center” (PaperOffice adds a leading underscore: `_cost_center`), field type “Text” and a prompt in your own words, such as “Cost center from the reference block, four digits”. Under “If value not found on document”, the rule is “Required — HITL review”. Expanded, the field card shows type, rule, keyname and prompt; before the test run it reads “Not yet extracted”.
- 1 **Choose a template:** “Free template (Blank)” in the catalog for a custom schema, then “Create agent”.
- 2 **Add the field:** in the agent editor, click “New field”, then enter field label, keyname, field type and prompt.
- 3 **Set the rule:** “Required — HITL review” for values the report cannot do without. If the value is missing, the invoice appears in the “IDP Review” view.

TIP: ONE KEYNAME PER KEY VALUE

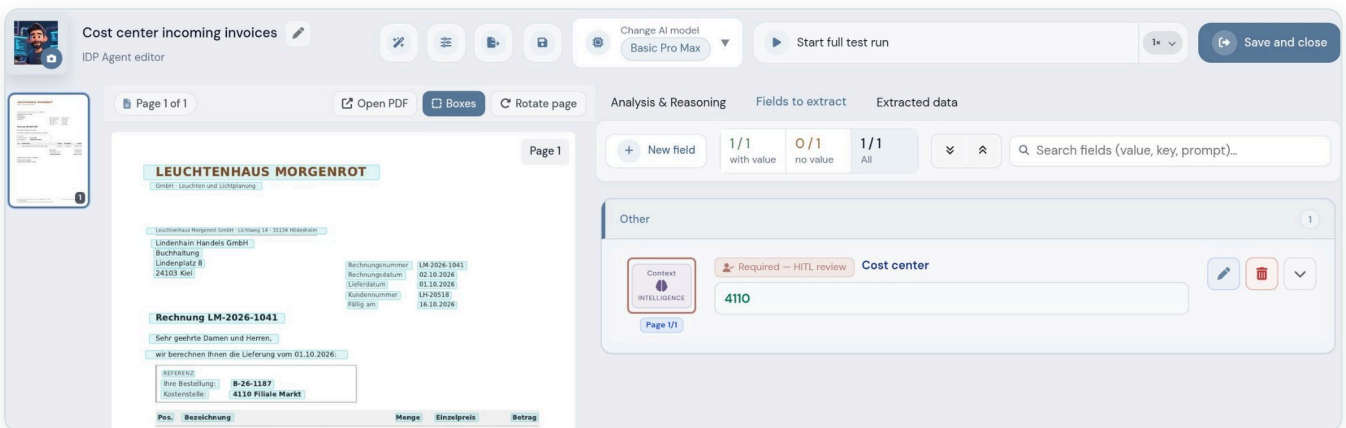
Give the same field the same keyname in every IDP Agent, such as `cost_center`. PaperOffice keeps it as one field, and the export puts the value in one column, whichever document type it comes from.



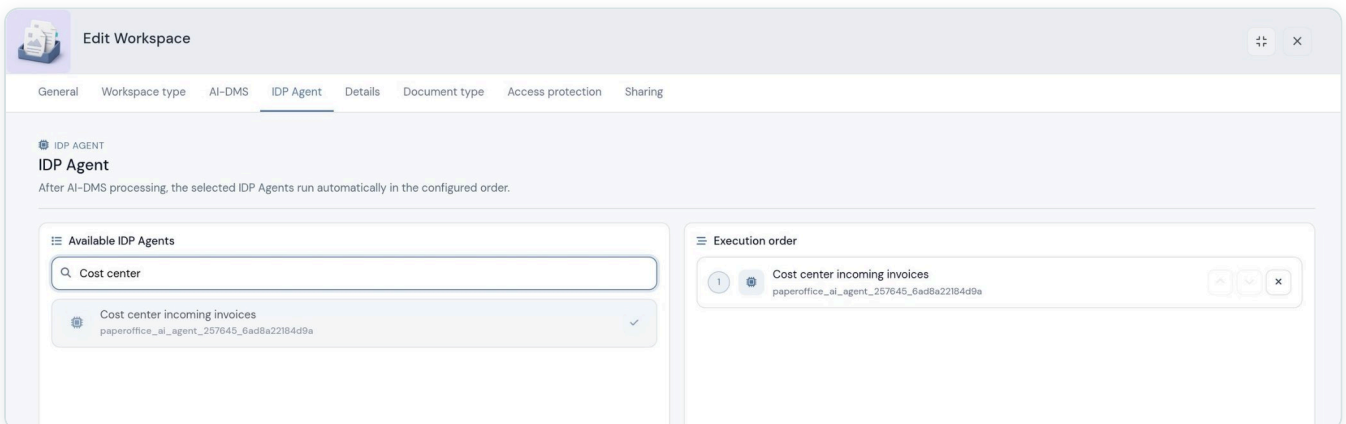
06 · TEST IT, THEN LET IT RUN

Test first. Then the agent runs every time.

In the agent editor, you check the field on the selected invoice before saving. Then you attach the agent to the Workspace.



- 1 "Start full test run". Each field shows the result and the page; on invoice LM-2026-1041, the cost center is 4110 on page 1. If the agent finds a source box, it is marked on the document on the left. Repeat the run 3, 5 or 10 times and compare whether the value stays the same. Then "Save and close".



- 2 **Edit Workspace** > **IDP Agent**. On the left "Available IDP Agents", on the right the "Execution order". After AI-DMS processing, the selected agents run automatically in this order.

Invoices already there

Select them, **Actions** > **Agents & workflows** > **IDP**,
"Apply existing agent".

A single document

In the "Data Fields" tab with "Apply agent", for example
after sharpening the prompt.

07 · CHECKING VALUES AGAINST THE SOURCE

The values with their source. A view shows what is missing.

Open an invoice and the **Data Fields** tab. It lists the values from AI-DMS and from the IDP Agent, values such as amounts and numbers with the snippet from the document.

The screenshot shows the 'SPEDITION HALDENWEG' invoice on the left and the 'Data Fields' tab on the right. The invoice details include: Rechnungsnr. SH-26-5531, Rechnungsdatum 09.10.2026, Leistungszeitraum 01.10.-09.10.2026, Kundennummer HW-00239, and Fällig am 09.11.2026. The invoice is addressed to Lindenhai Handels GmbH, Buchsalmberg, Lindenplatz 8, 24533 Kahl. The 'Rechnung SH-26-5531' section lists items with columns for Menge, Einzelpreis, and Betrag. The total amount is 4,069.80 EUR. The 'Data Fields' tab on the right shows fields extracted from the invoice, categorized by source: AI-DMS (Cost center: 4200, Currency: EUR, Document Number: SH-26-5531, Gross Amount: 4,069.80, Net Amount: 3,420.00) and IDP (Cost center: 4200, Currency: EUR, Document Number: SH-26-5531, Gross Amount: 4,069.80, Net Amount: 3,420.00). Each field has a small snippet of the document text next to it.

- 1 The Spedition Haldenweg invoice. On the left the invoice, on the right Cost center 4200 from the IDP Agent, then Currency EUR, Document Number SH-26-5531, Gross Amount 4,069.80 and Net Amount 3,420.00 from AI-DMS. Document number and amounts each sit next to the snippet they were read from.

The screenshot shows the 'Incoming Invoices Lindenhai...' view. It features a table with columns: DOCUMENT, DOCUMENT TYPE, KEYWORDS, DOCUMENT STATUS, ADDED, and AUTOMATION. The first row shows an invoice from 'Werbetchnik Sonnenhang GmbH' issued to 'Lindenhai Handels GmbH' for window film and installation services totaling 2,320.50 EUR including VAT. The invoice is marked as 'Manual review required' and 'Value could not be recognized'. The 'AUTOMATION' column shows 'AI-DMS Premium' and 'IDP'.

- 2 "IDP Review" view. Under **Options** → **Configure view**, it shows documents with missing or incomplete IDP fields. In the test package, that is the Werbetchnik Sonnenhang invoice, which carries no cost center.

Correct on the document

If a value was misread, correct it in the Data Fields. The next export contains the corrected value.

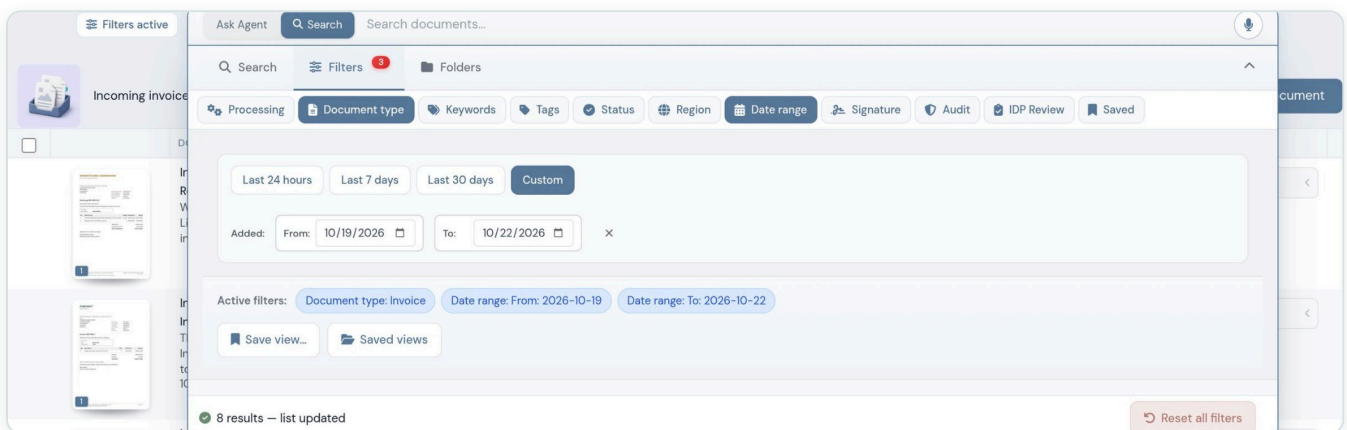
Review tasks

With a "Review queue when required fields are missing" in the agent, a missing value creates a task. Review tasks are included in the Professional plan.

08 · NARROWING DOWN THE REPORTING MONTH

Filter first. Then count.

The Table view and the Timeline work with the documents in the list, up to 500 of them. So narrow down the list under **Filters** in the search field at the top before you analyze.



- Filters for the report.** Under “Document type”, Invoice; under “Date range”, “Custom” with From and To. Below are the active filters and, at the bottom, the number of results, here all 8 invoices. The date range applies to the upload date, shown in the app as “Added”.



Allow a little extra

Invoices from the end of a month often arrive in the next one. Choose a date range a few days longer than the reporting month. The Timeline then sorts by invoice date.

Save the filter

“Save view...” keeps the selection in your browser. Next month, you call it up again under “Saved views”.

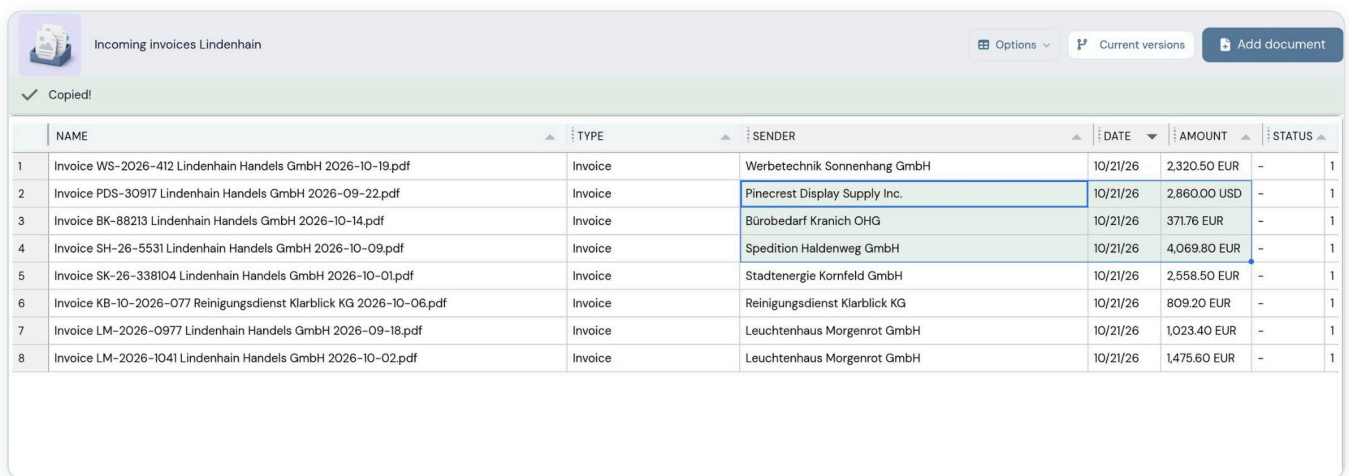
GOOD TO KNOW

With more than 500 documents in the list, the Table view and the Timeline show the first 500 and say “showing first 500”. Count and total then cover those 500. With more than 2,000 documents, the app stays in the List view. A filter keeps you below that.

09 · THE EXCEL-STYLE TABLE VIEW

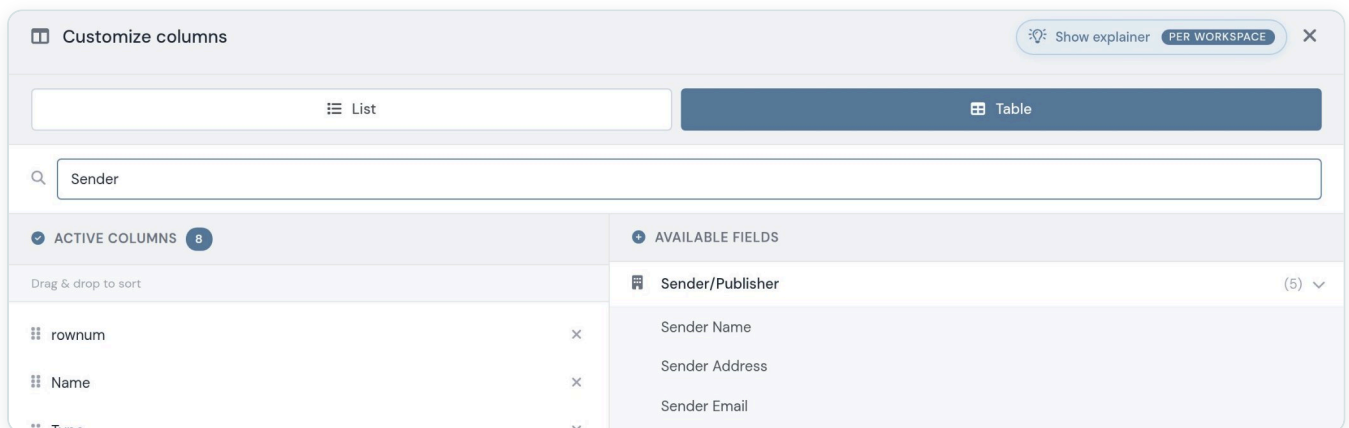
Rows and columns. Copy as in Excel.

Under **Options** > **Configure view**, choose “Table”. Each row is a document. You select cell ranges and copy them together with the column headers.



	NAME	TYPE	SENDER	DATE	AMOUNT	STATUS
1	Invoice WS-2026-412 Lindenhein Handels GmbH 2026-10-19.pdf	Invoice	Werbetechnik Sonnenhang GmbH	10/21/26	2,320.50 EUR	- 1
2	Invoice PDS-30917 Lindenhein Handels GmbH 2026-09-22.pdf	Invoice	Pinecrest Display Supply Inc.	10/21/26	2,860.00 USD	- 1
3	Invoice BK-88213 Lindenhein Handels GmbH 2026-10-14.pdf	Invoice	Bürobedarf Kranich OHG	10/21/26	371.76 EUR	- 1
4	Invoice SH-26-5531 Lindenhein Handels GmbH 2026-10-09.pdf	Invoice	Spedition Haldenweg GmbH	10/21/26	4,069.80 EUR	- 1
5	Invoice SK-26-338104 Lindenhein Handels GmbH 2026-10-01.pdf	Invoice	Stadtenergie Kornfeld GmbH	10/21/26	2,558.50 EUR	- 1
6	Invoice KB-10-2026-077 Reinigungsdienst Klarblick KG 2026-10-06.pdf	Invoice	Reinigungsdienst Klarblick KG	10/21/26	809.20 EUR	- 1
7	Invoice LM-2026-0977 Lindenhein Handels GmbH 2026-09-18.pdf	Invoice	Leuchtenhaus Morgenrot GmbH	10/21/26	1,023.40 EUR	- 1
8	Invoice LM-2026-1041 Lindenhein Handels GmbH 2026-10-02.pdf	Invoice	Leuchtenhaus Morgenrot GmbH	10/21/26	1,475.60 EUR	- 1

- 1 The eight invoices as a table. Columns Name, Type, Sender, Date (of upload), Amount and Status. Three rows are selected and copied with Ctrl+C (“Copied!”) for your spreadsheet. Amount shows each value with its currency.



Customize columns

Show explainer PER WORKSPACE

List

Table

Sender

ACTIVE COLUMNS 8

Drag & drop to sort

rownum

Name

Type

AVAILABLE FIELDS

Sender/Publisher (5)

Sender Name

Sender Address

Sender Email

- 2 “Customize columns”. At the top the switch between List and Table, on the left the active columns to reorder by drag and drop, on the right the available fields by category, such as Financial Data or Sender/Publisher, here narrowed by the search “Sender”. The choice applies per Workspace and is saved in the browser.

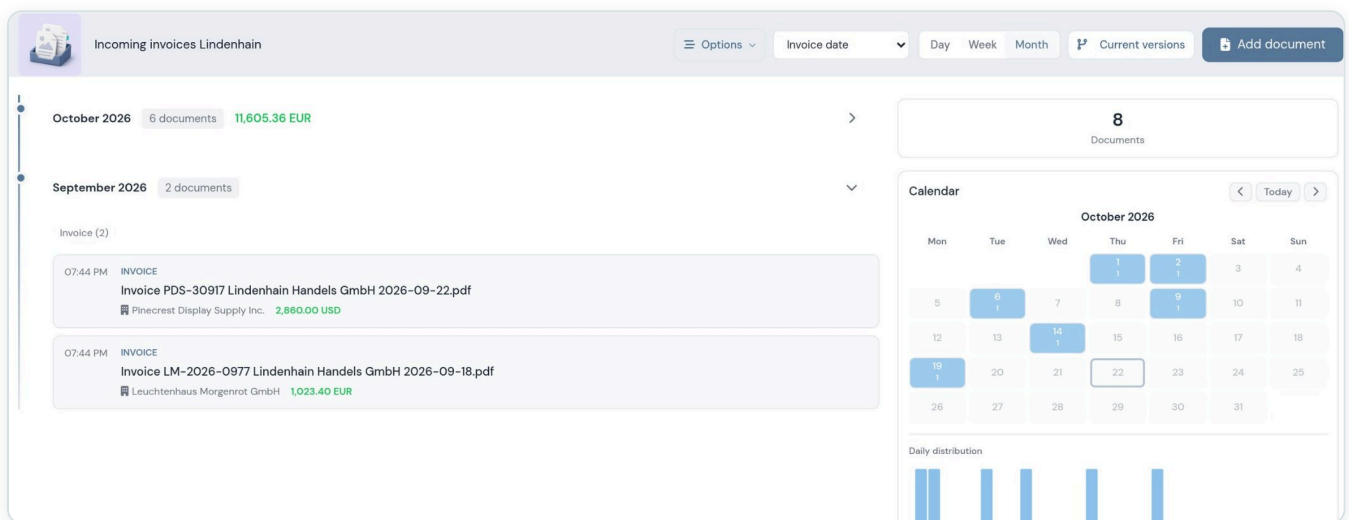
KEY VALUES FROM THE IDP AGENT

The cost center and your other own fields are on the document and in the export. For the report per cost center, use the export from Chapter 11.

10 · COMPARING MONTHS ON THE TIMELINE

Count and total per month. By the date that matters.

Under **Options** > **Configure view**, choose “Timeline”. At the top, set the date field to “Invoice date” and the grouping to “Month”.



- 1 **October and September 2026.** October: 6 documents, total in euros 11,605.36. September expanded: Invoice (2), USD 2,860.00 and EUR 1,023.40, therefore without a total. On the right, the calendar with the days that have invoices.

DATE FIELD	GOOD FOR
Invoice date	monthly report by invoice month
Due date	what is payable in which week, grouping “Week”
Added	what arrived during the month, all documents
Delivery, document and order date, Valid until	deliveries, orders and terms

One currency per total

The total appears when all amounts in a period share the same currency. That way, euros and dollars never become one number.

Documents with a date

The view for a date field shows the documents that carry this date. With “Added”, you see all of them again.

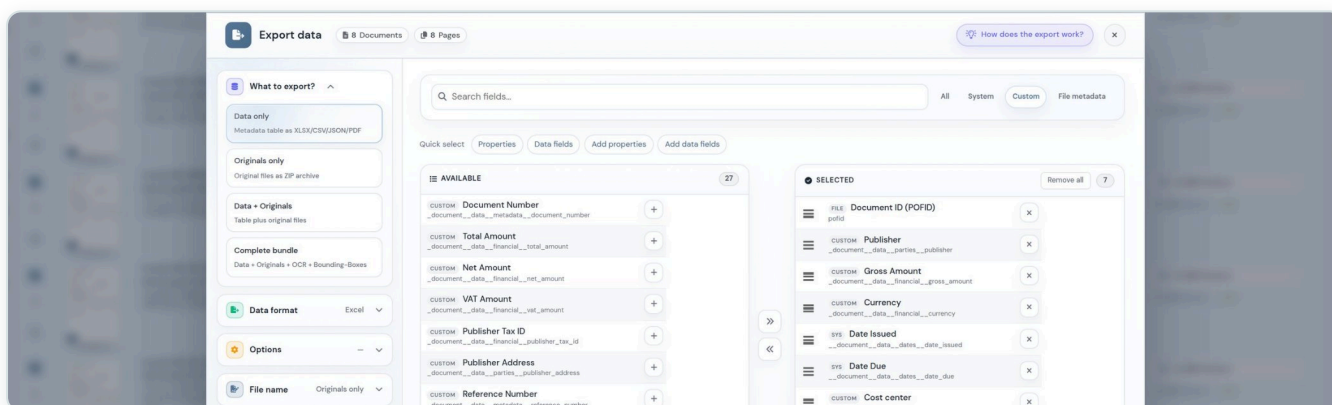
One click to the source

Each entry shows type, sender and amount and opens the document with one click.

11 · EXPORT AS A TABLE

The fields you choose. As XLSX, CSV, JSON or PDF.

In the “List” view, select the filtered invoices, then **Actions** > **Share & export** > **Export data**. One export covers up to 5,000 documents.



- 1 The export for the monthly report. “Data only” delivers the metadata table, with “Excel” as the format. The field list filters by “System”, “Custom” and “File metadata”. Selected are Document ID (POFID), Publisher (the sender), Gross Amount, Currency, Date Issued (invoice date), Date Due (due date) and Cost center with the key `_cost_center`.

MODE	WHAT YOU GET
Data only	metadata table as XLSX, CSV, JSON or PDF
Data + Originals	table plus original files
Originals only	original files as a ZIP archive
Complete bundle	data, originals, OCR and bounding boxes



Include the document ID

Select the field Document ID (POFID). Then every row leads back to its source, even months later.

Save as a profile

Under “Export profiles”, “Save current configuration as profile” keeps fields, mode and format in your browser. Next month, the profile is all you need.

12 · HANDOVER VIA REST API AND MCP

Your tool fetches the figures. On its own schedule.

For recurring reports, your BI tool pulls the same data via the REST API. Create the API key under [API & Developer](#) > [API Keys](#) with "Create New Key". It stays visible and copyable there.

```
GET https://api.paperoffice.ai/latest/analytics/financial-summary?period=30d&workspace_id=...
Authorization: Bearer poai_...
// response, shortened, expected for the test package
{
  "summary": { "total_amount": null, "total_amount_scope": "not_computed_mixed_currency" },
  "by_currency": [
    { "currency": "EUR", "total_amount": 12628.76, "document_count": 7 },
    { "currency": "USD", "total_amount": 2860.0, "document_count": 1 } ],
  "top_partners": [ { "name": "Spedition Haldenweg GmbH", "total_amount": 4069.8, ... } ]
}
```

PATH	CALL	RETURNS
Table	documents/documents-export with selected_pofids, selected_fields, export_format	the same table as the export, up to 5,000 documents
Totals	analytics/financial-summary, period 7d, 30d, 90d, 365d or all	total and count per currency, the ten largest partners
Due items	analytics/financial-overdue, limit up to 100	items due before today, days since due date, pofid
MCP	po_analytics_financial_summary_get, po_analytics_financial_overdue_get	the same figures in a conversation with Claude or Cursor

PERIOD BY UPLOAD DATE

period counts from the upload date; the default is 30 days. For a monthly report by invoice date, use the Timeline or the export; for all due items, use period=all. Whether an item has been paid is in your accounting system.

Seven questions before the first report.



Do we have to maintain data twice?

The fields come from processing: AI-DMS reads type, sender, amounts and dates, and an IDP Agent reads your own fields. You make corrections on the document, and the next export includes them.

Where does a figure in the export come from?

Each row can carry the Document ID (POFID). On the document, every value comes with its source location in the original, so you can check any figure against its source.

Are euros and dollars added up?

The Timeline shows a total when all amounts share one currency. Financial Analytics totals per currency and leaves the overall total empty for mixed currencies.

How does the data get into our BI tool?

As an export in XLSX, CSV or JSON, or via the REST API: documents-export returns the table, analytics/financial-summary the totals as JSON.

Who sees which figures?

The list, the export and the API show documents from the Workspaces someone has rights to. The same applies over MCP.

Can we see overdue invoices?

Via the REST API and MCP, Financial Analytics lists items due before today, with amount, partner and days since the due date. Whether they are paid, you see in your accounting system.

What does it cost?

Billing is based on usage, depending on the AI-DMS level and model. Prices are on the pricing page: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Run through one reporting month.

Eight invented invoices to Lindenhain Handels GmbH, a German retailer, show the whole path: from the cost center field to the total per currency. Seven are in German, one is in English.

REPORTING TEST PACKAGE

Eight invoices and a guide (README.txt)

Rechnung_LM-2026-1041_Leuchtenhaus_Morgenrot.pdf October, cost center 4110
 Rechnung_LM-2026-0977_Leuchtenhaus_Morgenrot.pdf September, cost center 4130
 Rechnung_KB-10-2026-077_Klarblick.pdf cleaning, cost center 4120
 Rechnung_SK-26-338104_Stadtenergie_Kornfeld.pdf electricity, cost center 4100
 Rechnung_SH-26-5531_Spedition_Haldenweg.pdf freight, cost center 4200
 Rechnung_BK-88213_Kranich.pdf office supplies, cost center 4100
 Invoice_PDS-30917_Pinecrest_Display_Supply.pdf September, in dollars
 Rechnung_WS-2026-412_Werbetechnik_Sonnenhang.pdf without a cost center
paperoffice.ai/downloads/paperoffice-ai-test-package-reporting.zip



- 1 **Workspace:** at app.paperoffice.ai, create "Incoming invoices Lindenhain" with AI-DMS Premium (Chapter 04).
- 2 **Agent:** upload LM-2026-1041, create the IDP Agent with the cost center field on it, test it and attach it to the Workspace (05, 06).
- 3 **Upload:** the other seven invoices via "Add document"; for LM-2026-1041, use "Apply existing agent".
- 4 **Analyze:** "IDP Review", the Table view and the Timeline with invoice date and month (07 to 10).
- 5 **Export and API:** export all eight to Excel with Document ID and cost_center, optionally call financial-summary (11, 12).

STEP	WHAT YOU SHOULD SEE
Data Fields	type Invoice, sender, gross amount and currency, seven cost centers
IDP Review	Werbetechnik Sonnenhang, cost center missing
Timeline, month	October 6 documents, total 11,605.36; September 2, without a total
Export	8 rows with POFID and a cost_center column
financial-summary	euros 12,628.76 from 7 documents, dollars 2,860.00 from one

The values are the amounts on the invented invoices; check what PaperOffice reads against the document. All companies, names, addresses and bank details are fictitious. The cost of the test is shown on the pricing page: paperoffice.ai/en/pricing.

15 · [READ MORE: DATASHEETS AND SHORT GUIDE](#)

Every building block in detail. As a PDF to read.

The datasheets describe the modules this guide uses, and the short guide sums up the topic on eight pages. A click on a card opens the PDF.

SHORT GUIDE Reporting: the topic on eight pages	DATASHEET IDP Agent: your own fields with source	DATASHEET Timeline: documents by date, per month
DATASHEET Financial Analytics: totals and due items via API	DATASHEET Smart Search: filters and matches	DATASHEET Workspaces: levels, rights and sharing

PDF	ADDRESS
Short guide Reporting	paperoffice.ai/downloads/paperoffice-ai-short-guide-prozess-reporting.pdf
IDP Agent	paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf
Timeline	paperoffice.ai/downloads/paperoffice-ai-datasheet-timeline.pdf
Financial Analytics	paperoffice.ai/downloads/paperoffice-ai-datasheet-financial-analytics.pdf
Smart Search	paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf
Workspaces	paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

SUGGESTED READING ORDER

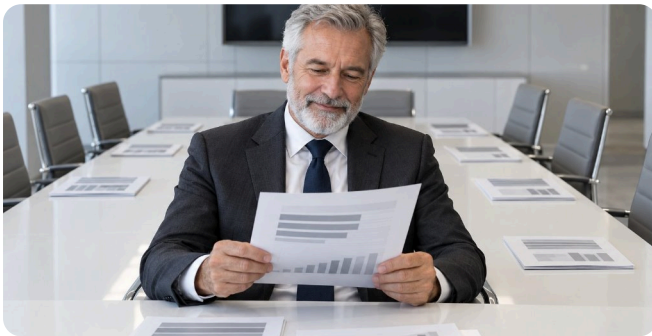
Start with the short guide for the overview, then the IDP Agent datasheet for your own fields. If you connect via API, read Financial Analytics last.



16 · YOUR FIRST REPORT IN FIVE DAYS

Start with one report. Then add the next.

To get started, you need one report you build every month and the invoices of one month.



1

Day 1 · Key values and Workspace

Decide which values the report needs and which documents they are on. Create a Workspace with AI-DMS Premium.

2

Day 2 · Own fields

Create an IDP Agent with cost center and other key values, test it on three invoices, fix the keynames.

3

Day 3 · Let it run and review

Attach the agent to the Workspace under "IDP Agent", process one month of invoices, go through "IDP Review".

4

Day 4 · Analyze

Save the filter, set up the Table view and the Timeline, create an export profile, compare spot checks with the original.

5

Day 5 · Handover

Create an API key, set up the pull in your BI tool, decide who pulls the report every month.

MEASURE THESE FOUR VALUES
No rework

Share of invoices that do not appear in "IDP Review"

Spot checks

Export values that match the original

Time to report

Time from the last document of the month to the finished report

Questions

Questions about figures answered via the document ID

Measure the first month carefully. Only the comparison with the following months shows how much typing goes away.

17 · CHECKLIST AND START

Before you expand.

- ☐ You have decided which key values the report needs and which documents they are on.
- ☐ The invoices sit in a Workspace of their own with AI-DMS Premium.
- ☐ Your own fields, such as the cost center, are described and tested in an IDP Agent.
- ☐ The same field carries the same keyname in every agent.
- ☐ The agent runs automatically in the Workspace under "IDP Agent".
- ☐ Someone checks the "IDP Review" view regularly.
- ☐ The filter for the reporting month is saved and stays below 500 documents.
- ☐ The export profile includes the Document ID (POFID).
- ☐ Amounts in different currencies are analyzed separately.

GET STARTED NOW

Create your account, set up the Workspace for your invoices and upload the test package.
Billing is based on usage; prices are on the pricing page.

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**QUESTIONS ABOUT THIS GUIDE?**

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

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As of October 2026. Screenshots are from a test account. All examples, company names, personal names, cost centers and values in this guide are fictitious. PaperOffice, paperoffice.ai.