



SHORT GUIDE · INDUSTRY · CONSULTING AND SERVICES

Where does it say what we promised the client?

The project file answers, source included.

Consultancies and service providers collect quotes, statements of work, timesheets, minutes and travel receipts per project. This short guide shows how PaperOffice files them by project, reads amounts as fields and answers questions to the project file. For partners, project leads and back office.

WHAT YOU TAKE AWAY

One workspace per project, receipts by mobile app, values as fields and Document Chat for the question about the status. Every answer names the documents it comes from.

01 · THE PROBLEM

The report has gone out. Which version was it?

Projects produce many documents: quote, statement of work, minutes, change requests, timesheets, invoices and travel receipts from abroad. They sit in emails, on laptops and on the project drive. Anyone who wants to clarify the status searches all three places.

WHY IT HAPPENS

Projects run through many channels

Commitments are in the minutes, changes in an email thread, the price in the quote. Each document stays wherever it happened to be created.

Receipts are created on the road

Hotel invoices from Paris, taxi receipts from Warsaw, train tickets as PDFs. They come in several languages and currencies and are often submitted weeks later.

Teams change

Whoever set up the project has long moved on to the next engagement. The new project lead knows the history from folders that someone else created.

HOW YOU NOTICE IT

- Before the steering committee, someone searches the emails for the latest minutes.
- The question about the status of a change request takes an afternoon.
- A hotel invoice is submitted twice, once from the hotel and once from the booking portal.
- Person-days from the statement of work are typed in again for every invoice.
- Travel receipts in a foreign language sit untouched until someone can read them.

02 · THE WAY WITH PAPEROFFICE

A project file that gives answers.

Statement of work, timesheet or travel receipt: every document goes into its project's workspace, is read and can then be queried. Projects and clients stay cleanly separated along the way.

1

One workspace per project

Every project or client gets its own workspace. Group permissions define who may view, upload or do everything, and from Business an SMS code protects confidential engagements.

[MODULE: WORKSPACES](#)

2

Receipts from the road

The mobile app scans receipts with edge detection, page by page in batch mode, and sends them to the chosen workspace. Offline, the scans wait until the network is back.

[MODULE: MOBILE APP](#)

3

Type, language, fields

AI-DMS recognizes quote, timesheet, minutes, invoice or receipt and the language. An IDP Agent reads person-days, service period, amount and currency with the source location.

[MODULE: IDP AGENT](#)

4

The project history in one line

The **Timeline** orders quote, minutes, change requests and acceptance by **Document date**, grouped by week or month. One click opens the document.

[MODULE: TIMELINE](#)

5

Questions to the project file

Document Chat answers questions such as "What did the steering committee decide on CR-03?" and lists the documents below the answer. Search also finds text in scans.

[MODULE: DOCUMENT CHAT](#)

03 · IN THE APP

From project kickoff to the first answer.

This is how you set up a project file. You need a workspace with AI-DMS Premium and documents from a running project whose content you know well.

1

Create the project workspace

Under **Document AI › Workspaces**, create a workspace for the project and set AI-DMS to Premium. Upload existing documents, select them and process them via **Actions › Agents & workflows › AI-DMS**.

2

Type for change requests

Under **Document AI › Document Types**, create a new type "Change Request" and describe briefly in English how to recognize it, for example number, reason and effort.

3

Read project fields

Select a statement of work, open **Actions › Agents & workflows › IDP** and create an agent with person-days, period, amount and currency. **Start full test run** shows value and source location for each field.

4

View the history

In the document list, choose the **Timeline** view with the date field **Document date**. Minutes, change requests and invoices appear one below the other for each month.

5

Ask the project file

Click **Ask Agent**, choose the project workspace in the **Search scope** and ask your question. The documents found appear below the answer and open with a click.

TIP FROM PRACTICE

Give change requests a fixed number Give every change request a fixed number such as CR-03 and use it in emails and minutes. Search then hits the number exactly, and the chat finds every document about the same change request.

04 · AN EXAMPLE

A management consultancy before the steering committee.



A management consultancy with 35 consultants runs a supply chain project for an industrial client, with assignments in Paris and Warsaw. A project folder on the drive, emails in several inboxes, travel receipts in envelopes. Before the steering committee, the partner wants to know the status of two change requests.

BEFORE

- Minutes and change requests sit in the inboxes of the project members.
- The back office types person-days from the statement of work into every invoice.
- Someone checks hotel invoices in French and Polish with a dictionary.
- To learn the status of a change request, the partner calls three colleagues.

WITH PAPEROFFICE

- All project documents sit in the project workspace, and receipts arrive by mobile app.
- The project agent reads person-days, period, amount and currency with the source.
- The **Timeline** shows quote, change requests and minutes by date.
- The chat answers the status question and names the minutes and email behind it.

An invented case that shows the approach. Check with documents from one of your own projects whether types and fields are right, and verify every chat answer against the original.

05 · CHECKLIST

Keeping the project file complete.

Ten points to settle before the first project and to look at regularly afterwards.

- ☐ Every running project has its own workspace with clear group permissions.
- ☐ The consultants have paired the mobile app and choose the project workspace when scanning.
- ☐ Change requests have a document type of their own with a short description.
- ☐ Someone checks person-days and amounts against the original before they go into billing.
- ☐ New versions of a report are added as a version to the existing document.
- ☐ The project workspace is set to AI-DMS Premium.
- ☐ Project emails reach the workspace through a connector from an IMAP mailbox.
- ☐ The project agent is tested on a statement of work, a timesheet and an invoice.
- ☐ Notices of possible duplicates are looked at before every reimbursement.
- ☐ The travel policy sits in the workspace so the chat finds it when asked.

06 · FREQUENTLY ASKED QUESTIONS

What partners and project leads want to know first.

How does PaperOffice fit with time tracking and invoicing?

Time tracking, planning and invoicing stay in your tools. PaperOffice takes care of the documents they produce and passes the extracted fields on as an export or through the REST API.

How do we keep the project budget in view?

Person-days from the statement of work and amounts from the invoices arrive as fields per project and can be exported. Totals and assessment stay in your project controlling, and PaperOffice supplies the documents with their source.

How do we track change requests?

With a document type of their own, AI-DMS recognizes them at intake. In the **Timeline** they appear with minutes and emails by date, and the chat answers questions about the status with the documents behind it.

Can PaperOffice read travel receipts from abroad?

Yes. AI-OCR detects the language of every page, also for photos from the mobile app. The IDP Agent delivers amount and currency as fields, in the output language you set on the agent.

What happens to a hotel invoice submitted twice?

Same document number from the same issuer or the same text: the document shows **Possible Duplicate** with the reason and a link to the first copy. You look at both and decide before anything is reimbursed.

Do all consultants see all projects?

Everyone sees the workspaces their group has permissions for, in the list, in search, in the chat and through MCP. For confidential engagements, a password or SMS code also protects the workspace from Business.

07 · HOW TO START

Start with your current project

Create an account at app.paperoffice.ai, set up a workspace for a running project and upload the statement of work, minutes and receipts. Billing is based on usage, and the pricing page shows the prices.

Pick a project

Take a project whose history you know. With the first questions to the chat you then see right away whether the answers are correct.

Agree on the fields

Decide with the project lead and the back office which values every statement of work and every invoice should deliver.

Bring the consultants along

Pair the mobile app on the team's phones. Travel receipts then land in the project workspace on the day of the trip.

DATASHEETS ON THIS TOPIC

Workspacespaperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf**Mobile App**paperoffice.ai/downloads/paperoffice-ai-datasheet-mobile-app.pdf**IDP Agent**paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf**Timeline**paperoffice.ai/downloads/paperoffice-ai-datasheet-timeline.pdf**Document Chat**paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf**Smart Search**paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

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