



SHORT GUIDE · INDUSTRY · REAL ESTATE AND PROPERTY MANAGEMENT

Lease papers here, utility bills over there?

Now every property lives in one Workspace.

Leases, rental applications, utility bills, handover reports and contractor invoices are spread across binders, inboxes and drives. This short guide shows how PaperOffice files them per property, reads them and makes them easy to ask about. For property managers, landlords and letting agents.

WHAT IT IS ABOUT

One Workspace per property, rent details and meter readings as fields, answers from your portfolio with the documents found, and handover reports the tenant signs on site on a smartphone.

01 · THE PROBLEM

One property, many files. Each holds only a part.

Every building comes with leases, tenants' rental applications and proofs, utility bills, contractor invoices, minutes of owners' meetings and handover reports with photos. They sit in binders, inboxes and drives, sorted by sender rather than by property.

WHY IT HAPPENS

Many senders per property

Tenants, utilities, contractors, owners and authorities send documents through their own channels. Which address a document belongs to is stated only in the document itself.

Every lease is different

Old standard leases, association forms and your own templates mix in the portfolio. Base rent, deposit and notice period sit in a different place each time.

Appointments on site

Handovers, meter readings and defects are recorded in the empty apartment, on paper and with a phone. It often takes days until report and photos reach the office.

HOW YOU NOTICE IT

- For a tenant question, binders, inbox and drive are searched for the lease.
- Base rent and deposit are retyped from the lease into the property management software.
- Meter readings from utility bills are copied by hand for every unit.
- A contractor invoice came by mail and by email and was paid twice.
- The signed handover report is in the car, and the photos are on the phone.

02 · THE WAY WITH PAPEROFFICE

File per property, read and ask.

Your property management software remains the system for rents, accounting and statements. PaperOffice handles the documents around it: file them per property, recognize them, read lease details, ask about the portfolio and have reports signed on site.

1

One Workspace per property

Every address gets a Workspace with its own group rights. Business Workspaces can ask for a password or SMS code on opening, and deleted documents go to the trash.

[MODULE: WORKSPACES](#)

2

Recognize what comes in

Mail arrives by scanner or upload, photos by Mobile App. AI-DMS recognizes types such as lease, utility statement, handover report, land register extract and energy certificate.

[MODULE: CLASSIFICATION](#)

3

Rent and meters as fields

An IDP Agent reads base rent, advance payment, deposit, lease start and notice period as you describe them. The **Utility Bill** template delivers meter number, meter readings and period.

[MODULE: IDP AGENT](#)

4

Ask about the portfolio

Document Chat searches one or all properties, reads the matching leases and shows them below the answer, for example for "Which leases have stepped rent?".

[MODULE: DOCUMENT CHAT](#)

5

Sign on site

The tenant receives the handover report by SMS link on their smartphone and signs in the browser. The signed PDF carries a certificate with a timestamp.

[MODULE: PAPEROFFICE SIGN](#)

03 · IN THE APP

From the first property to a portfolio you can ask.

This is how you set up a property and work with it. You need an account, a Workspace with AI-DMS Premium and a few typical leases and bills for that building.

1

A Workspace per property

Under **Document AI > Workspaces**, create a Workspace named after the address, choose Business as its type and set AI-DMS Premium for new documents.

2

Pair the smartphone

Pair the smartphone by QR code in the **Security Center**. In the app, you then send photos and reports from appointments straight into the property's Workspace.

3

Create the lease agent

Select a lease, open **Actions > Agents & workflows > IDP**, pick **Free template (Vision)** in the catalog and add the fields with **New field**. For utility bills, choose the **Utility Bill** template.

4

Ask the portfolio

Open the chat with **Ask Agent**, choose one or all properties in the **Agent context** and ask in your own words. A click opens the lease in the original.

5

Sign the report

Select the prepared handover report, choose **Actions > Signature > Sign on smartphone** and set where the signature goes. The tenant signs in the browser.

TIP FROM PRACTICE

Workspaces by property, not by document type Create Workspaces per address instead of per document type. Lease, statement and report of a building then sit together, and in the **Agent context** you choose one property or the whole portfolio.

04 · AN EXAMPLE

A new build with 48 units goes up for rent.



A real estate agent is letting a new build with 48 apartments for a developer. She collects rental applications and proof of income, closes leases, registers meters with the utilities and hands over the apartments, often in an empty unit between two appointments.

BEFORE

- Rental applications and payslips sit in folders and in the inbox.
- She retypes base rent, deposit and lease start from every lease.
- She copies meter readings from the utility unit by unit into a list.
- The tenant signs the handover report on paper; the photos stay on the phone.

WITH PAPEROFFICE

- All documents for the new build sit in one Workspace, recognized by type.
- The IDP Agent reads base rent, deposit and lease start, with the source in the lease.
- The **Utility Bill** template delivers meter number and meter readings for export.
- The tenant signs on a smartphone, and the photos are added by Mobile App.

An invented letting case for illustration. Check for yourself which fields your leases should deliver, what form a contract requires and how you handle tenant data.

05 · CHECKLIST

Is your office ready for Workspaces per property?

Go through these points with management, accounting and field staff. Most can be tried out on a single building.

- ☐ It is decided whether you create one Workspace per building, per economic unit or per owners' association.
- ☐ New documents run on AI-DMS Premium so that senders and amounts are read.
- ☐ The lease agent has been tested on three leases from different decades.
- ☐ The smartphones for handovers and meter readings are paired.
- ☐ For notice periods, there is a task with deadline and assignee on the lease.
- ☐ For each Workspace it is set which groups may read, upload or do everything.
- ☐ The lease fields are agreed: unit, base rent, advance payment, deposit, lease start, notice period.
- ☐ 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.
- ☐ Whoever uses chat answers checks every figure in the original lease.

06 · FREQUENTLY ASKED QUESTIONS

What management and letting ask first.

Does PaperOffice cope with old lease templates?

An IDP Agent reads your fields by content, by labels and context, instead of fixed positions. You describe your own fields, such as parking space or stepped rent, in words. Test the agent on leases from several decades.

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 an invoice is paid twice.

How do lease details get into our software?

Rents, deposits and meter readings sit as data fields on the document and go to your software as XLSX, CSV or JSON. Via REST API you start an agent and fetch the fields; AI assistants ask over MCP.

How do we record notice periods?

The IDP Agent reads lease start and notice period as fields with their source location in the lease. On the lease, you add a task with deadline and assignee on the **Activities** tab. The legal assessment of a termination stays with you.

What kind of signature does the handover report get?

A simple electronic signature (SES) under eIDAS. The link arrives by SMS at the tenant's mobile number, and the certificate shows mobile number, time and device. Clarify with your legal advisor what form a lease requires.

How do we share documents with owners or buyers?

The **External Sharing** redaction scenario removes personal data from a copy, with a preview. The copy goes out by link with a password, and every access is logged for that delivery.

07 · HOW TO START

Create the Workspace for your next property.

Create an account at app.paperoffice.ai, set up a Workspace for one building and upload its leases and bills. You pay for what you process; the pricing page lists the tiers.

Pick a building

Take a property with a mixed portfolio, upload leases, bills and reports and see which types are recognized.

Agree on lease fields

Decide with management and accounting which fields every lease should deliver, and test the agent on old and new templates.

Make the next handover digital

Pair the smartphone for field staff and have the next handover report signed on site on the tenant's smartphone.

DATASHEETS ON THIS TOPIC

Workspaces

paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

Mobile App

paperoffice.ai/downloads/paperoffice-ai-datasheet-mobile-app.pdf

Classification

paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf

IDP Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf

Document Chat

paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf

PaperOffice Sign

paperoffice.ai/downloads/paperoffice-ai-datasheet-esignature.pdf

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