



SHORT GUIDE · INDUSTRY · INDUSTRY AND MANUFACTURING

Checking delivery notes against the order by hand?

The variance per item is already there.

Delivery notes, mill certificates, test reports and drawings arrive at the gate, by mail and by email. This short guide shows how PaperOffice captures them at goods receipt, reads line items and batches, and matches order, delivery note and invoice. For production, purchasing and quality.

OVERVIEW

Scans from the network scanner at the gate, line items with quantity and batch as a table with their source, a 3-way match per order reference, and a search that finds the certificate and test report for a batch.

01 · THE PROBLEM

The goods are at the gate. The check takes time.

At goods receipt, delivery notes arrive on paper, mill certificates reach purchasing by email, invoices go to accounting. Anyone checking whether item, quantity and batch match the order lays documents side by side and types up line items. Until then the goods wait or go into production unchecked.

WHY IT HAPPENS

Documents arrive separately

The delivery note comes with the truck, the certificate by email, the invoice by mail days later. What belongs together sits in three places and is only pulled together when someone checks.

Every supplier, a different layout

Line items, quantities and batches sit differently on every supplier's document. A fixed template per supplier hardly keeps up with new suppliers.

The batch must be traceable

In a complaint, what counts is which delivery note, which certificate and which test report belong to a batch. If the documents are scattered, the search starts in binders and mailboxes.

HOW YOU NOTICE IT

- Delivery notes sit in a tray at goods receipt until someone carries them to the office.
- Line items and quantities are compared with the order in the ERP by hand.
- Mill certificates sit in purchasing's mailbox, and goods receipt sees them later.
- An over-delivery only shows up when the invoice arrives.
- For a complaint, the certificate for a batch is searched for in several binders.

02 · THE WAY WITH PAPEROFFICE

From the gate into the workspace, matched against the order.

Order, delivery note and invoice land in the same workspace. AI-DMS detects the type, an IDP Agent reads the line items, and PaperOffice matches documents with the same order reference. Search finds certificates and test reports by batch number.

1

Scans from the gate and the mailbox

The network scanner at goods receipt scans via SFTP into its own inbox, and a connector brings the scans into the workspace. An email connector picks up certificates from the mailbox.

[MODULE: NETWORK SCANNER](#)

2

Recognize the type

AI-DMS detects delivery note, purchase order, invoice, certificate, test report, technical drawing or declaration of conformity. You add your own types, such as mill certificate.

[MODULE: CLASSIFICATION](#)

3

Read line items and batches

The `Analyze Delivery Note` template reads the order reference and line items as a table, including columns such as batch, serial number and weight. Fields and table rows come with their source.

[MODULE: IDP AGENT](#)

4

Match against the order

If order, delivery note and invoice carry the same order reference, PaperOffice matches them in the workspace: header amount, delivered quantity, invoiced quantity and unit price per item.

5

Find the certificate for a batch

Search finds a batch number in the recognized text of every document, scans included. Document Chat answers questions such as “Which certificate belongs to batch 2211?” with the documents.

[MODULE: SMART SEARCH](#)

03 · IN THE APP

From the scanner at the gate to the 3-way match.

Here is how to set up the route from goods receipt to the match. You need a goods-receipt workspace with AI-DMS Premium in which orders, delivery notes and invoices sit together.

1

Connect the scanner at the gate

Under **Document AI** › **Storage Mounts**, add a Storage Mount with **Provide as Scanner Endpoint**, choose **Activate Endpoint** and enter host, port 2022, user and password on the device. A connector fetches the scans.

2

Agents from templates

Select a delivery note, open **Actions** › **Agents & workflows** › **IDP** and create an agent with **Analyze Delivery Note**. For orders choose **Process Order**, for invoices **Extract Invoice (Full)**.

3

One agent per document type

Under **Document AI** › **Document Types**, use **Bind IDP Agent** on delivery note, purchase order and invoice to set the matching agent. It then reads every newly detected document in all workspaces.

4

Group by order

In the document list, choose **Group by** › **Purchase order reference (PO)**. Each group shows whether order, delivery note and invoice are present, and the status of the match.

5

Review a variance

The **3-way match** dialog lists the checks, for example whether the delivered quantity exceeds the ordered quantity, and Ordered, Delivered and Invoiced per item.

TIP FROM PRACTICE

Test with your most difficult supplier For the first test, take delivery notes from three suppliers, including a stamped scan. The test run shows value, page and source for each field. That way you see before going live whether quantities and batches are right.

04 · AN EXAMPLE

An injection molder, twelve suppliers, one gate.



An injection molding plant with 90 employees buys granulate, color concentrate and inserts from twelve suppliers. Goods receipt accepts delivery notes on paper, and mill certificates reach purchasing by email. Production planning checks quantities and batches against the order in the ERP.

BEFORE

- Delivery notes sit in the tray at the gate until production planning picks them up.
- Quantities and items are compared line by line with the order in the ERP.
- Mill certificates sit in purchasing's mailbox, apart from the delivery note.
- For a complaint, the certificate for a batch is searched for in binders.

WITH PAPEROFFICE

- Goods receipt scans every delivery note at the network scanner, and a connector files it in the workspace.
- Line items, quantities and batches are a table with their source on the delivery note.
- The group per order reference shows whether quantities and prices match the order.
- A search for the batch number finds delivery note, certificate and test report.

An invented business for illustration; all people are made up. Check with documents from your own suppliers whether order reference, item numbers and batches are read correctly.

05 · CHECKLIST

Before the first delivery note goes through the scanner.

Go through the points with goods receipt, purchasing and quality. Each of them can be settled in your own plant before you start.

- ☐ Orders, delivery notes and invoices of one plant sit in the same workspace.
- ☐ Your suppliers print your order number unchanged on delivery note and invoice.
- ☐ The network scanner at the gate is set up as a Scanner Endpoint and checked with a test scan.
- ☐ It is settled who decides on a variance in the 3-way match .
- ☐ Drawings and formulations sit in a separate workspace with group rights.
- ☐ The goods-receipt workspace processes with AI-DMS Premium or Ultra.
- ☐ The item number is the same in order, delivery note and invoice.
- ☐ The delivery note agent has been tested on documents from several suppliers, scans included.
- ☐ For mill certificates, it is clear which fields are read, such as batch and material.
- ☐ New drawing revisions are filed as a version on the existing document.

06 · FREQUENTLY ASKED QUESTIONS

What goods receipt, purchasing and quality want to know.

Do we need a template per supplier?

You describe the fields once, and the IDP Agent reads them by content, even in a new layout. Test with delivery notes from several suppliers before the agent runs automatically.

Are batch and serial numbers read?

Yes, if the delivery note shows them. The [Analyze Delivery Note](#) template reads them as columns of the line item table. For certificates and test reports, you add the batch as a field of its own, described in plain words.

How does the data get into our ERP?

Booking stays in your ERP. PaperOffice delivers the fields as XLSX, CSV or JSON, or your ERP pulls them through the REST API, for example with `POST /documents/idp-agent-run`.

What does the match against the order need?

Order, delivery note and invoice in the same workspace, with an identically spelled order reference. For quantities and prices, line items need the same item number on all three documents. Without line items, the match compares the header amount.

What about stamped and handwritten documents?

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

How do we protect drawings and formulations?

In a separate workspace: group rights set who can view, upload or do everything. From the Business workspace type on, a password or an SMS code also protects opening it. You file new revisions as a version.

07 · HOW TO START

Scan your next delivery note at the gate.

Sign in to your PaperOffice account, create the goods-receipt workspace and upload an order with its delivery note. Costs follow usage, and the pricing page spells them out.

Pick one supplier

Start with a supplier who delivers often and prints the order number cleanly on its documents.

Match for one week

File one week of orders and delivery notes and compare the match with your previous checks.

Extend to all suppliers

Once the route works, connect the scanner at the gate and bind the agents to the document types.

DATASHEETS ON THIS TOPIC

Network Scanner

paperoffice.ai/downloads/paperoffice-ai-datasheet-integration-network-scanner.pdf

Connectors

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

Classification

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

IDP Agent

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

AI-OCR

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

Smart Search

paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

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