



SHORT GUIDE · INDUSTRY · IT AND SOFTWARE

License, subscription, DPA: what ends when?

From now on, term and notice period sit on the contract as fields.

IT and software companies manage customer contracts, licenses, software subscriptions, DPAs and security evidence. This short guide shows how PaperOffice files them by area, reads contract durations as fields and answers questions from customer audits with sources. For management, IT and finance.

WHAT YOU TAKE AWAY

One workspace per area, an IDP Agent for your contract fields and Document Chat for questions from the security questionnaire. Every value leads back to its place in the original.

01 · THE PROBLEM

Subscriptions here, contracts there. So where is the deadline?

In IT companies, contracts come from many directions: customers send framework agreements and DPAs, software and cloud vendors send their subscription terms, purchasing sends invoices in euros and dollars. Everyone files where they happen to work. Anyone looking for a term or a commitment asks around.

WHY IT HAPPENS

Contracts are signed with a click

Many software subscriptions are taken out online. The terms arrive as a PDF by email and stay in the inbox of whoever placed the order. The central file often never sees them.

Every vendor writes it differently

Term, renewal and notice period sit in the order form for one vendor and in the terms or an annex for another. Sometimes in German, sometimes in English, sometimes in months, sometimes as a date.

Customers want evidence

Before a contract renewal, customers send security questionnaires. The answers are in DPAs, certificates and audit reports that different teams keep.

HOW YOU NOTICE IT

- A subscription runs for another year because the notice period was noticed too late.
- The license list in the spreadsheet has long described other contracts than the current ones.
- Three teams search for the same evidence for one security questionnaire.
- The same invoice exists once as a PDF from the email and once as a scan.
- English contract terms only get read when things are urgent.

02 · THE WAY WITH PAPEROFFICE

File it, extract it, look it up.

Customer contract, license and audit report follow the same path: file by area, recognize the type, read contract fields, order end dates and answer questions with sources. The building blocks every workspace comes with are all it takes.

1

One workspace per area

Contracts, finance and security each get their own workspace with their own group permissions. From Business, a password or SMS code protects the workspace on top of the login.

[MODULE: WORKSPACES](#)

2

Intake through a connector

Contracts arrive by upload or through a connector from SFTP, S3, WebDAV or an IMAP mailbox. Attachments of an email become documents of their own.

[MODULE: CONNECTORS](#)

3

Recognize the type

AI-DMS recognizes contract, license, data processing agreement, certificate, audit report or invoice. From Premium, sender, amounts and the contract end are added.

[MODULE: CLASSIFICATION](#)

4

Read contract fields

An IDP Agent reads vendor, term, renewal, notice period, amount and currency, described in your own words. For every value it shows the page and the spot in the original.

[MODULE: IDP AGENT](#)

5

End dates and questions

Sorted by **Valid until**, the **Timeline** shows which subscriptions and licenses end in which month. Document Chat answers questions from the questionnaire with the matching documents.

[MODULE: DOCUMENT CHAT](#)

03 · IN THE APP

Three workspaces, one contract agent.

This is how you set up the contract file. You need workspaces with AI-DMS Premium and a few typical contracts as samples, such as a software subscription, a license and a customer contract with a DPA.

1

Create the areas

Under **Document AI > Workspaces**, create one workspace per area, type Business, AI-DMS Premium. Upload existing contracts, select them and process them via **Actions > Agents & workflows > AI-DMS**.

2

Build the contract agent

Select a contract, then **Actions > Agents & workflows > IDP** and **Create new agent**. Create fields in your own words, such as "notice period in months" or "renews automatically, yes or no".

3

Test it and let it run

Start full test run shows value, page and source location for each field. Once the values are right, assign the agent to the workspace so it reads every new contract.

4

View end dates

In the document list, choose the **Timeline** view with the date field **Valid until** and group by month. On the contract, add a task with a deadline on the **Activities** tab.

5

Look up evidence

Click **Ask Agent** at the top, choose the Contracts and Security workspaces as scope and ask the question from the questionnaire. The documents appear below the answer.

TIP FROM PRACTICE

Contract end and notice period side by side **Valid until** is the contract end. Read the notice period as a field of its own, so both sit on the contract and you can set the task early enough to give notice. Check renewed contracts against the original.

04 · AN EXAMPLE

A software company before a contract renewal.



A software company with 60 employees serves customers in retail and industry and uses around 40 software subscriptions itself. The IT administrator keeps licenses and contract durations in a spreadsheet. Before renewing its framework agreement, a major customer sends a security questionnaire.

BEFORE

- Subscription terms sit in the inboxes of the colleagues who placed the orders.
- She types term and notice period into the spreadsheet by hand.
- She reads English contract terms only when a cancellation is urgent.
- For the questionnaire she gathers DPAs, certificates and reports from three teams.

WITH PAPEROFFICE

- Subscriptions, licenses and customer contracts sit in the workspace of their area.
- The contract agent reads term and notice period, and the values arrive in her language.
- In the **Timeline** she sees which contracts end in which month.
- Document Chat names, for each question, the documents the answer comes from.

A fictitious case for illustration. Check with your own subscription and license contracts whether contract end and notice period are right, and verify every chat answer against the original.

05 · CHECKLIST

Ten points for the contract file.

Use these points to check whether filing, contract fields and evidence hold up in everyday work.

- ☐ It is settled which areas get their own workspace, such as contracts, finance and security.
- ☐ Each workspace has a clear rule on which group may view, upload or do everything.
- ☐ The workspaces with contracts are set to AI-DMS Premium.
- ☐ The field list is agreed: vendor, term, renewal, notice period, amount, currency.
- ☐ The contract agent is tested on a subscription, a license and a customer contract.
- ☐ The agent is assigned to the workspace and reads new contracts as well.
- ☐ Subscription confirmations from mailboxes reach the workspace through a connector or by upload.
- ☐ Every important contract end has a task with a deadline and an assignee.
- ☐ DPAs, certificates and audit reports sit in the Security workspace so the chat can find them.
- ☐ Someone looks at notices of possible duplicates before anything is paid.

06 · FREQUENTLY ASKED QUESTIONS

What management and IT want to know.

How does PaperOffice fit with our ticketing and license system?

Tickets, billing and development keep running in your tools. PaperOffice files the documents around them, extracts them and makes them findable. The fields move on as JSON, CSV or Excel or through the REST API.

How do we keep automatic renewals in view?

AI-DMS Premium reads the contract end as **Valid until**, and an IDP Agent adds notice period and renewal as fields. In the **Timeline** you sort by the end date, and on the contract you add a task with a deadline on the **Activities** tab.

Can we work with English contracts and reports?

Yes. AI-OCR detects the language of every page, and the IDP Agent delivers the values in the language you set on the agent. Individual passages go through AI Translation, and you protect technical terms in the glossary.

Does PaperOffice help with a customer's security questionnaire?

With looking things up. Document Chat searches DPAs, certificates and audit reports and names the documents its answer is based on. You write and take responsibility for the answers in the questionnaire yourself.

What happens when an invoice arrives twice?

If it carries the 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 one. You decide whether it is a duplicate. Byte-identical files are already flagged at upload.

How are the areas kept apart?

Through separate workspaces. You grant permissions per group and workspace, and from Business a password or SMS code is added. List, search, chat and MCP show each person the workspaces they have permissions for.

07 · HOW TO START

Have your first license contract read

Create an account at app.paperoffice.ai, set up a Contracts workspace and upload a typical software subscription. Billing follows usage, and the pricing page lists the prices.

Define the areas

Agree with management and finance which areas are kept apart and which group may see which workspace.

Pick three sample contracts

A software subscription, a license, a customer contract with a DPA: use them to test the contract agent before the rest of the files follow.

Collect the evidence

Put DPAs, certificates and audit reports into the Security workspace. At the next questionnaire, ask the chat first.

DATASHEETS ON THIS TOPIC

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

Workspaces

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

Classification

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

Connectors

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

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