



SHORT GUIDE · INDUSTRY · LEGAL AND LAW FIRMS

Twenty client matters, one pile of mail? Every matter gets its own workspace.

Briefs, court orders, powers of attorney and client mail arrive mixed together, yet each belongs to exactly one matter. This short guide shows how PaperOffice files them per matter, reads them, makes them searchable by question and shares them safely. For law firms and legal departments.

WHAT IT COMES DOWN TO

One workspace per matter with its own rights, type and reference number from every incoming document, answers from the file with the documents found, and redacted copies sent out by link with a password.

01 · THE PROBLEM

The mail arrives mixed. The file needs it separated.

Every day a law firm receives briefs, court orders, powers of attorney, contracts and client mail, on paper, by fax and by email. Each item belongs to exactly one matter, and all of it is confidential. Sorting, looking things up and passing documents on take time every single day.

WHY IT HAPPENS

Many channels, one matter

Letters, faxes, emails and client documents arrive in different places. Before everything sits with the right matter, it passes through several hands.

Answers are buried in the file

What the other side argued or when a contract was amended is somewhere in briefs and exhibits. Anyone who needs to know leafs through the whole file.

Sharing takes care

Experts, insurers and opposing counsel need documents, but not bank details or third-party addresses. Covering them by hand takes time, and one spot is easily missed.

HOW YOU NOTICE IT

- A brief sits in the inbox tray for a day before it reaches the file.
- A client's follow-up question means leafing through the entire file.
- The same court order is in the file, in the mailbox and in the scan folder.
- Copies for the expert are covered by hand and scanned again.
- Who may see which matter is governed by a folder structure on a shared drive.

02 · THE WAY WITH PAPEROFFICE

Every matter on its own, every answer with a source.

The path is the same for briefs, court orders and contracts: file it in the matter's workspace, recognize it, read the fields, ask the file and share it safely. For each step there is a building block in the app.

1

One workspace per matter

You assign rights per workspace and group. Business workspaces can ask for a password or SMS code before they open, and Compliance workspaces add a watermark to every download.

[MODULE: WORKSPACES](#)

2

Recognize what comes in

AI-DMS detects the type, such as court document, power of attorney, settlement, warning letter or fax, and summarizes it. From Premium on, it adds sender, recipient and reference number.

[MODULE: CLASSIFICATION](#)

3

Read case numbers and deadlines

The **Analyze Legal Document** template reads case number, client, opposing party, subject matter and deadlines, each value with its source in the brief. You describe your own fields in plain words.

[MODULE: IDP AGENT](#)

4

Ask the file

Document Chat searches the matter's workspace by meaning, text and data fields, reads the matching documents and lists them below the answer.

[MODULE: DOCUMENT CHAT](#)

5

Share a redacted copy

The **Legal Proceedings** scenario redacts third-party contact data, and a whitelist keeps the parties to the proceedings visible. The copy goes out by link with its own password, and every access is logged.

[MODULE: SECURE EMAIL DELIVERY](#)

03 · IN THE APP

From the first matter to a file you can ask.

Here is how to set up a matter and work with it. You need an account, a workspace and a few typical briefs from that matter.

1

Create the workspace

Under **Document AI › Workspaces**, create one workspace per matter, choose Business or Compliance as the type and set AI-DMS Premium for new documents.

2

Process existing files

Load existing briefs into the workspace, select them and choose the Premium tier under **Actions › Agents & workflows › AI-DMS**. Type, sender and reference number then appear on the document.

3

Create the field agent

With a brief selected, open **Actions › Agents & workflows › IDP** and build an agent from the **Analyze Legal Document** template. Compare the test run field by field with the brief, then save.

4

Ask the file

Open the chat with **Ask Agent**, pick the matter in **Search scope** and ask in plain words. A click on a document below the answer opens the original.

5

Redact and send

Under **Actions › Agents & workflows › Redact**, redact with a preview using the **Legal Proceedings** scenario. Send the copy with **Actions › Share & export › Send by email**, with the password by SMS if you like.

TIP FROM PRACTICE

Double-check every deadline against the brief Next to the value, the data field shows the excerpt from the brief. Check the start and end of the deadline there, and create a task with a due date and an assignee on the **Activities** tab.

04 · AN EXAMPLE

A construction law firm, three hundred open matters.



A firm for construction and tenancy law with 14 employees handles about 300 open matters. Mail arrives by letter, fax and email. Every morning a paralegal sorts it into the files and prepares copies for experts.

BEFORE

- Every morning he sorts the pile of mail into the files by hand.
- For a follow-up question he leafs through the file's briefs and exhibits.
- He copies deadlines from the brief into the calendar by hand.
- He covers copies for experts by hand and scans them again.

WITH PAPEROFFICE

- He scans the mail into the workspace of each matter, and AI-DMS detects type and sender.
- Case number, opposing party and deadlines are fields with their source on the brief.
- Document Chat answers follow-up questions and lists the documents found below.
- For the expert, a redacted copy goes out by link with a password.

An invented example for illustration: the firm and its staff are made up. Check with your own briefs whether case numbers and deadlines are read correctly.

05 · CHECKLIST

Before the first matter moves into a workspace.

Settle these points with your lawyers and support staff. Most of them can be tried out on a single matter.

- ☐ You have decided whether to create one workspace per matter or per practice area.
- ☐ Matters with especially sensitive documents sit in Business or Compliance workspaces.
- ☐ New documents run with AI-DMS Premium so that sender and reference number are read.
- ☐ The agent has been tested on three briefs from different courts.
- ☐ A redaction scenario with a whitelist is set for experts and opposing counsel.
- ☐ For each matter, it is settled which groups may read, upload or do everything.
- ☐ The route for mail is set: upload, scanner, mailbox or an intake workspace.
- ☐ The field list for briefs is agreed, such as case number, opposing party and deadlines.
- ☐ Every deadline that is read is checked against the original and recorded under your firm's rules.
- ☐ Documents go out by secure delivery with a password, and the proof PDF goes into the file.

06 · FREQUENTLY ASKED QUESTIONS

What lawyers and staff want to know.

How does PaperOffice fit with our practice management software?

Case management, billing and the calendar stay in your practice software. PaperOffice handles the documents: recognize, read, ask and share safely. Read fields go to your systems as XLSX, CSV or JSON or are retrieved through the REST API.

Are deadlines in briefs recognized?

The **Analyze Legal Document** template reads deadlines as a field, with the source in the brief. You keep running deadline control under your firm's rules and attach a task with a due date and an assignee to the brief on the **Activities** tab.

How do we redact before sharing?

Under **Actions › Agents & workflows › Redact**, with a preview: the **Legal Proceedings** scenario marks third-party contact data, and you add or remove areas with a click. The text underneath is removed from the copy, and the original stays unchanged.

How does mail reach the right matter?

You upload it straight into the matter's workspace. Or an intake workspace takes everything in, and a Workflow Agent moves each processed document according to your instruction. Workflow Agents come with the Professional plan.

Can the chat answer questions about the whole file?

Yes. In **Search scope** you choose the matter's workspace, and the chat then searches the processed documents in it. The documents found appear below the answer and open in the original with a click. The legal evaluation remains a matter for your lawyers.

How are matters kept apart?

Through separate workspaces with rights per group: view and download, plus upload, or full access. The server checks these rights on every call, whether from the app, through the REST API or over MCP.

07 · HOW TO START

Create the workspace for your next matter.

Sign up at app.paperoffice.ai, set up a workspace for an open matter and scan the next mail into it. You are charged for usage; the pricing page has the details.

Pick a matter

Take an open matter with mixed mail and create the first workspace for it.

Agree on the field list

Decide with your lawyers which fields every brief should deliver and who checks them.

Read up on the building blocks

The datasheets on Workspaces, IDP Agent, Document Chat and secure delivery explain each building block in detail.

DATASHEETS ON THIS TOPIC

Workspaces

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

Secure email delivery

paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf

Workflow Agents

paperoffice.ai/downloads/paperoffice-ai-datasheet-workflow-agents.pdf

MORE ON THIS TOPIC

Legal and law firms

paperoffice.ai/en/solutions/industry/ai-legal-law-firms-document-management



MORE ON THIS TOPIC

paperoffice.ai/en/solutions/industry/ai-legal-law-firms-document-management

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact