



SHORT GUIDE · INDUSTRY · CLUBS AND NON-PROFITS

Receipts in envelopes, grant letters lost in binders?

Now every club document sits read and ready in one place.

Receipts, grant decisions, statutes and resignations arrive on paper, by email and often handwritten. This short guide shows how PaperOffice captures, reads and files them by area. For clubs, associations and non-profits run by volunteers on the board and in the treasury.

IN SHORT

Receipts go by smartphone into the treasury's Workspace, amounts and dates become fields with their source location, duplicates are flagged, and questions about statutes and grants name the documents as sources.

01 · THE PROBLEM

Volunteers have little time. The receipts keep coming.

Many people help out in a club, but few have time for paperwork. Receipts come from coaches and helpers, grant decisions from funders, resignations by letter. Everything piles up with whoever runs the treasury or the board right now, in binders, envelopes and a private inbox.

WHY IT HAPPENS

Many hands, one treasury

Receipts are created at training, at the summer fair and on shopping runs. They travel through jacket pockets and envelopes and often reach the treasurer weeks later, with no note on what they were for.

Officers change

With every election, binders move from one basement to the next. Knowing where each grant decision and each contract sits often leaves with the person who hands over the role.

Deadlines in the small print

Grant decisions set conditions and proof deadlines, the statutes set notice periods for meetings and resignations. Whoever needs them first has to find the document, then the right passage.

HOW YOU NOTICE IT

- Before the annual audit, someone spends a weekend sorting, searching and asking around.
- Receipts handed in twice surface only when checked against the bank statement.
- Receipts for the proof of use are missing because they sit somewhere in the club.
- A handwritten resignation is noticed only after the fee has been collected.
- After an election, the new board does not know which records exist at all.

02 · THE WAY WITH PAPEROFFICE

Capture, read, file in one place.

Your membership software stays as it is. PaperOffice handles the paper around it: it takes in receipts and letters, reads type, amounts and dates, and files everything in the Workspace of the right area.

1

Capture receipts right away

The treasurer photographs receipts with the Mobile App; the camera detects the page and corrects the perspective. Without a connection, the scan waits on the device.

[MODULE: MOBILE APP](#)

2

One Workspace per area

Treasury, board and sections get their own Workspaces with rights per group. From the Business type, a password or SMS code also protects each opening.

[MODULE: WORKSPACES](#)

3

Read amounts and dates

An IDP Agent with the **Receipt** template reads receipt number, date, merchant, total, VAT and payment method, each value with its source location in the original.

[MODULE: IDP AGENT](#)

4

Flag duplicate receipts

From AI-DMS Premium, PaperOffice compares content as well as document number and issuer. If the receipt already exists, the document shows **Possible Duplicate** with a link to the original.

[MODULE: KNOWLEDGE GRAPH](#)

5

Ask statutes and grants

Document Chat answers questions such as "How much notice do we give for the general meeting?" across the chosen Workspaces and names the documents as sources.

[MODULE: DOCUMENT CHAT](#)

03 · IN THE APP

How the club sets up PaperOffice.

Five steps for treasury and board. You need an account, one Workspace per area and a smartphone for receipts. AI-DMS Premium suits receipts; choose Ultra for handwritten letters.

1

Create Workspaces

Under **Document AI > Workspaces**, create one Workspace each for treasury, board and sections and choose the AI-DMS tier. You grant rights per group and Workspace.

2

Pair a smartphone

In the **Security Center**, click **Add mobile device** and scan the QR code with the phone. Then photograph receipts, pick the treasury's Workspace and send.

3

Build the receipt agent

Select a receipt, open **Actions > Agents & workflows > IDP** and create a new agent from the **Receipt** template. Check the values in the test run, then save.

4

Resolve duplicates

If a receipt shows **Possible Duplicate**, one click opens the earlier document. If it is a separate payment, hide the note with **Not a duplicate**.

5

Ask and export

Use **Ask Agent** to ask about statutes and grant decisions. For the audit, select the receipts and output them as Excel or CSV via **Share & export > Export data**.

TIP FROM PRACTICE

One task for every proof deadline When a grant decision arrives, read the proof deadline in the original and add a task with deadline and assignee on the decision's **Activities** tab. That way even a newly elected board sees what is still open.

04 · AN EXAMPLE

A community association gets its treasury in order.



A community association with 350 members runs a neighborhood center with classes, festivals and a small café. The volunteer treasurer collects receipts from twelve helpers, manages grants from the city and prepares the audit every year.

BEFORE

- Receipts arrive in envelopes, often weeks after the purchase and with no purpose noted.
- In the evenings, the treasurer types date, merchant and amount into a spreadsheet.
- A drinks invoice arrived by post and by email and was paid twice.
- For the proof of use, the board searches for receipts in three binders.

WITH PAPEROFFICE

- The treasurer photographs every receipt with the Mobile App as it is handed in.
- The Receipt template reads date, merchant, amount and payment method.
- The second drinks invoice carries Possible Duplicate and is checked before anyone pays.
- For the audit, he exports the year's receipts as an Excel list.

A made-up club for illustration. Check for yourself which receipts your auditors require, how long you keep them and who may see which data.

05 · CHECKLIST

Is your club ready for the first receipt?

Settle these points on the board before the first receipts go through. Most of them can be ticked off in one meeting.

- ☐ The board has agreed which areas get a Workspace of their own: treasury, board, sections.
- ☐ Member lists and bank details open only after a password or SMS code.
- ☐ Helpers know when and where to hand in their receipts.
- ☐ Someone regularly checks which receipts are flagged as possible duplicates.
- ☐ The export list for the audit has been agreed with the auditors.
- ☐ Each Workspace has groups assigned: who views and downloads, who uploads, who has full access.
- ☐ The treasury's smartphone is paired, and receipts land in the treasury's Workspace.
- ☐ The receipt agent has been tested on five real receipts, including a crumpled one.
- ☐ Every grant decision has a task with its proof deadline and an assignee.
- ☐ Retention periods for receipts have been clarified with your tax advisor.

06 · FREQUENTLY ASKED QUESTIONS

What board and treasurer want to know first.

Do we keep using our club software?

Yes. Membership management, fee collection and accounting stay in your programs. PaperOffice takes care of the documents. The fields it reads go on as Excel, CSV or JSON, via the REST API or over MCP.

Can we look things up in the statutes?

Yes. Document Chat reads statutes, invitation and minutes and names the documents its answer relies on. Read the passage in the original; the assessment stays with the board.

Who sees member data and receipts?

You grant rights per Workspace: view and download, plus upload, or full access. From the Business type, a Workspace can be set to open only with a password or SMS code.

Does PaperOffice read handwritten resignations?

Yes. Put letters in a Workspace with AI-DMS Ultra, and AI-OCR also reads handwriting. The text appears on the document and in search. Whether the notice period in the statutes was met is for the board to judge.

How do we keep track of grants?

A custom IDP Agent reads funder, amount, conditions and proof deadline from grant decisions as fields, each with its source location. On the decision, you add a task with deadline and assignee.

How long do we keep receipts?

You set this per document type: years, jurisdiction and legal basis. When a receipt is locked as tamper-proof, the period of its type applies. Which periods apply to your club, clarify with your tax advisor.

07 · HOW TO START

Capture your next receipt with a smartphone.

Create an account at app.paperoffice.ai, set up a Workspace for the treasury and pair the smartphone. PaperOffice bills by usage, and the pricing page shows what that costs.

Start with the treasury

Most receipts are created in the treasury. Start there with one Workspace and the receipt agent, and add the other areas afterwards.

Set a routine for receipts

Decide when helpers hand in their receipts, and photograph them right then. That way every receipt is already in the Workspace at year-end.

Bring in older years

Scan binders from earlier years as batches. The Split Agent separates each batch into single receipts, and search finds them again afterwards.

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**AI-OCR**paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf**Knowledge Graph**paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-graph.pdf**Document Chat**paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf

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