



SHORT GUIDE · DOCUMENT TYPE · FORMS

Typing up stacks of paper forms? Every form becomes a clean record.

Applications, registrations and questionnaires come back filled in: scanned, photographed, often handwritten. This short guide shows how PaperOffice reads text fields, checkboxes and handwriting, checks required details and turns each form into a record. For clubs, administration and case handling.

THE KEY POINT IN ONE SENTENCE

One agent per form: it reads text fields, checkboxes as yes or no and handwriting, each with its source location, and hands missing required details to a person for review.

01 · THE PROBLEM

Filled in on paper. Needed as a record.

A form is meant to collect details in a uniform way. Filled in on paper, someone still has to read, decipher and transfer every entry into a spreadsheet or software. Illegible fields, forgotten checkmarks and missing signatures often show up late in the process.

WHY IT HAPPENS

Handwriting takes time

Everyone writes differently. Deciphering names, addresses and email addresses in boxes or on lines takes longer than any printed line and leads to follow-up questions.

Checkmarks need context

A checkmark only means something once it is clear which question it belongs to. Whoever types up checkboxes matches every row to its question and translates the result into yes or no.

Returned incomplete

Required fields stay empty, signatures are missing, old versions of the form are in circulation. This is often noticed only during entry, when the form is already in the pile.

HOW YOU NOTICE IT

- Completed forms sit in the tray for days before anyone has time to enter them.
- Email addresses and phone numbers read from handwriting lead to bounces and wrong numbers.
- Missing signatures or checkmarks surface only when the case is supposed to move on.
- Several versions of the same form are in circulation at the same time.
- Data entry depends on one person who knows the forms and their quirks.

02 · THE WAY WITH PAPEROFFICE

From paper form to finished record.

The path is the same for every layout: collect, split, read, review, pass on. You set up no fixed field coordinates for this; the agent reads your fields from the content.

1

Collect the returns

Forms arrive via network scanner, upload or as a photo from your team's Mobile App. The app detects the sheet and corrects the perspective.

[MODULE: MOBILE APP](#)

2

Split the stack into forms

If every form has the same number of pages, the Split Agent separates the stack with the rule `Every N pages`. Otherwise it detects boundaries from the content or a cover sheet.

[MODULE: SPLIT AGENT](#)

3

Detect type, start the agent

Classification detects the type, such as form or a custom type like membership application. The IDP Agent set for that type starts automatically.

[MODULE: CLASSIFICATION](#)

4

Fields, checkboxes, handwriting

The IDP Agent reads text fields, checkboxes as yes or no, selection fields and handwriting, each with its page and position in the original.

[MODULE: IDP AGENT](#)

5

Review and pass on

If a required field is missing or a value breaks a required rule, the attached review queue creates a task. You export the records as Excel, CSV or JSON.

03 · IN THE APP

How a paper form becomes a record.

Five steps in the app. You can use the IDP Agent in all plans; review tasks are included in the Professional plan.

1

Create your own form type

Under **Document AI > Document Types**, create a new type, such as membership application, and describe it briefly in English for the AI.

2

Build an agent for handwriting

Select a completed form, then **Actions > Agents & workflows > IDP** and **Create new agent**. For handwriting and checkboxes, choose **Free template (Vision Pro)** with the Ultra Pro Max model.

3

Define fields and test

Set checkboxes as yes/no fields, selections with allowed values and required details as required with review. Then **Start full test run** on several forms.

4

Bind the agent to the type

On the type under **Document AI > Document Types**, choose the agent as **Default IDP Agent**. From then on, it reads every detected form automatically.

5

Review and export

Review open fields under **Workflow AI > Human In The Loop Tasks**, then confirm or correct them. Via **Share & export > Export data**, download the records as Excel, CSV or JSON.

TIP FROM PRACTICE

Design forms so they are easy to read If your forms always have the same number of pages, an agent under **Document AI > Split Agent > Create Split Agent** with the rule **Every N pages** splits every stack by a fixed page count. Print the form version in the footer, and you can read it as a separate field.

04 · AN EXAMPLE

A sports club captures without retyping.



A sports club with 900 members accepts membership applications on paper, at the clubhouse, at training and at events. A volunteer types name, address, date of birth, section and SEPA details into the membership software, usually on weekends.

BEFORE

- Applications collect in a folder and are entered once a week.
- Handwritten email addresses are guessed, and bounces follow later.
- A missing checkmark or date of birth is noticed only while typing.
- Data entry depends on one person and their free weekends.

WITH PAPEROFFICE

- The stack is scanned, and the Split Agent separates it into applications of two pages each.
- An IDP Agent with Ultra Pro Max reads name, address, section and the checkboxes as yes or no.
- If the date of birth or another required field is missing, the application goes to the board as a task.
- The reviewed records go into the membership software as CSV.

An example for illustration, not a real customer. Check which details are required, how your software imports CSV and how you handle personal data.

05 · CHECKLIST

Are your forms ready to be read?

Use these points to prepare your first form type and to see where the review should start.

- ☐ Which forms come back filled in, and how many per month?
- ☐ Which fields are handwritten, and which are checkboxes?
- ☐ Which versions of the form are in circulation, and is the version printed on it?
- ☐ Which format does your software need for dates, numbers and yes/no values?
- ☐ Which workspace should hold the forms, and who may open it?
- ☐ Which details are required before an application can be processed?
- ☐ Does every form have the same page count, or do you separate with a cover sheet?
- ☐ Which fields have fixed values, such as section or rate?
- ☐ Who reviews incomplete forms, and who receives the review tasks?
- ☐ Do you have three completed sample forms for the first test run?

06 · FREQUENTLY ASKED QUESTIONS

What to know about forms before you start.

Do I need to set field coordinates?

No. You describe each field in plain words, and the IDP Agent reads it from the content. If a form changes, you check the agent in a test run on the new version instead of redrawing a template.

How do checkboxes get into the record?

As a field of type boolean with yes or no, or for several options as a selection with allowed values. Test forms with corrections or double checkmarks specifically in the test run before going into production.

Does form data stay in its own area?

Put the forms in their own workspace. Workspaces separate documents by department or procedure, and from the Business type up, a password or SMS code also protects them on opening.

Are handwritten entries read?

Yes. The **Free template (Vision Pro)** with the Ultra Pro Max model is designed for handwriting and checkboxes. Every value comes with its source location, so you can check uncertain spots against the original.

What happens with incomplete applications?

For each field, you decide what happens when a value is missing: required with review, review flag, default value or allow empty. With a review queue attached, a task is created for required fields.

How does the data get into our software?

As an export of the selected documents in Excel, CSV, JSON or PDF, via REST API or via MCP. You set the language of the values and the date, number and currency format in the agent.

07 · HOW TO START

Read in your first stack of forms.

Create an account at app.paperoffice.ai, upload three completed forms and build your first agent via [Actions > Agents & workflows > IDP](#). Billing is based on usage and depends on the model tier.

Pick one form

Start with the form that comes back most often and create a custom document type for it.

Test on real forms

Include easy and hard-to-read forms in the test run, including corrections. Once the values are right, bind the agent to the type.

Decide review and export

Decide who reviews incomplete forms and test the export with your software before the whole stack runs.

DATASHEETS ON THIS TOPIC

IDP Agent

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

AI-OCR

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

Classification

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

Split Agent

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

Mobile App

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

Network Scanner

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

MORE ON THIS TOPIC

Forms

paperoffice.ai/en/solutions/document/ai-form-recognition-ocr-automation



MORE ON THIS TOPIC

paperoffice.ai/en/solutions/document/ai-form-recognition-ocr-automation

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact