



SHORT GUIDE · PROBLEM · ERROR RATE

A transposed digit nobody noticed? Every value can be checked against the original.

Retyping by hand causes transposed digits, swapped fields and missing details. This short guide shows how PaperOffice reads values straight from the document, checks them against your rules and hands missing or rule-breaking values to a person. For accounting and case handling.

THE KEY POINT IN ONE SENTENCE

Fewer errors come from fewer manual steps: the IDP Agent reads every value with its source location, your rules per field flag deviations, and a person reviews exactly the fields that need it.

01 · THE PROBLEM

The error happens while typing. It is noticed much later.

Amounts, numbers and dates move from paper or PDF into the ERP, a spreadsheet or a case system by keyboard. Every manual step is a chance for a transposed digit. The error often shows up only when a customer asks, in a dunning run or during an audit, and then someone has to find where the value came from.

WHY IT HAPPENS

Entered twice, risky twice

The value is already in the document and still gets typed a second time. Whoever retypes it reads, remembers digits and writes them again, and any of these steps can shift a digit.

Checks by gut feeling

Spot checks and second looks depend on time and focus. At month-end or under high volume, people look less closely, exactly when the most is being entered.

No way back to the source

In the end, the system holds the number. Where it came from and who entered it is hard to tell later. Every correction therefore starts with a search for the original.

HOW YOU NOTICE IT

- Customer or supplier queries are about wrong amounts, numbers or dates.
- Correcting entries and credit notes caused by entry errors are part of daily work.
- To confirm a value in the system, someone has to dig out the original.
- Checks run as spot checks because there is no time for a full review.
- Missing required details show up in the next work step instead of on arrival.

02 · THE WAY WITH PAPEROFFICE

Read instead of type. Review where it counts.

PaperOffice takes the values straight from the document. Every value keeps its source location, your rules per field flag deviations, and missing required details become a task for a person. With AI-DMS Ultra, a content audit is added.

1

The document type picks the agent

Classification detects the type, such as invoice or insurance claim. If a default IDP Agent is set for the type, it starts automatically.

[MODULE: CLASSIFICATION](#)

2

Read values with their source

The IDP Agent reads your fields from the document, including scans and photos. Every value comes with its page and position in the original, tables row by row.

[MODULE: IDP AGENT](#)

3

Rules per field

For each field you set the field type and, as a rule, a pattern or allowed values. If a value breaks the rule, the field is flagged, as a required review if you choose.

[MODULE: IDP AGENT](#)

4

A review task for a person

If a required field is missing or a value breaks a required rule, the attached review queue creates a task. The reviewer sees document and fields side by side.

5

Check the content with Ultra

With AI-DMS Ultra, the audit checks every document in twelve control areas, including calculations and required fields. A calculation error appears as a finding with a quote.

[MODULE: AUDIT CENTER](#)

03 · IN THE APP

How to set up the review.

You build an IDP Agent on a real document, test it, set rules per field and attach a review queue. Review tasks and HITL Agents are included in the Professional plan.

1

Build the agent on a sample

Select a typical document, then **Actions › Agents & workflows › IDP** and **Create new agent**. Describe the fields in plain words or start from a template.

2

Test for stability

Start full test run shows result, confidence, page and source location per field. Repeat the run 3, 5 or 10 times and compare the values.

3

Set rules

For each field, enter a pattern or allowed values under **Advanced validation**. For critical fields, choose **Required — HITL review** for violations.

4

Attach a review queue

Under **Workflow AI › HITL Agents**, create a HITL Agent with review fields and assignment. In the IDP Agent, select it under **Review queue when required fields are missing**.

5

Work through the tasks

Under **Workflow AI › Human In The Loop Tasks**, review each field next to the marked areas, then confirm or correct it. **IDP Review** lists all documents with open fields.

TIP FROM PRACTICE

Reserve required review for fields that matter Put the required review on fields where an error has consequences, such as amount, customer number or bank details. For secondary fields, a soft review flag on the document is enough. That keeps the queue short and every task worth a look.

04 · AN EXAMPLE

An insurance broker reviews instead of typing.



An insurance broker with 25 employees handles applications and claim reports that arrive by mail, scan and email. Until now, the back office types name, policy number, date of loss and amount into the broker software. Errors surface when the insurer asks back.

BEFORE

- Every claim report is typed into the broker software by hand, field by field.
- A colleague spot-checks entries when there is time left at the end of the day.
- Missing details surface only when the insurer sends the case back.
- For every query, someone searches for the original in a binder or mailbox.

WITH PAPEROFFICE

- An IDP Agent on the insurance claim type reads the fields automatically after intake.
- A pattern checks the policy number; if the date of loss is missing, a task is created.
- The back office works through these tasks, field next to source, and confirms or corrects.
- The reviewed values go to the broker software as a CSV export.

An example for illustration, not a real customer. Check which fields are required in your business and how your target system takes in data from CSV or via API.

05 · CHECKLIST

Where do errors happen in your business?

Use these points to find out where values are transferred by hand and which review pays off first.

- ☐ Which documents are typed up by hand today, and by whom?
- ☐ Which fields cause the most queries or corrections?
- ☐ Which fields are required before a case may move on?
- ☐ Which fields follow a fixed pattern, such as a policy or customer number?
- ☐ Which fields have a fixed list of allowed values, such as line of business or status?
- ☐ Who reviews today, and who should receive the review tasks in future?
- ☐ Do you have a typical sample document per document type for the first test run?
- ☐ How does your target system take in data: import from CSV or Excel, or via REST API?
- ☐ Which document types should also get a content check, for example for calculation errors?
- ☐ How do you measure errors today, so you can compare after the start?

06 · FREQUENTLY ASKED QUESTIONS

What teams ask about error rates before starting.

Do we need a template per sender or form version?

No. You describe the fields in plain words, and the IDP Agent reads them from the content. To get started, it suggests fields from a sample document, and a template catalog helps with standard documents.

What happens when a required field is missing?

You decide per field: required with review, soft review flag, default value or allow empty. With a review queue attached, a task is created. Nobody confirms a missing value blindly there; it has to be entered.

Who works on the review tasks?

In the HITL Agent you set which fields are reviewed and who is responsible, a user or a group. Without a selection, the task goes to the organization owner. Every task has a deadline.

How do I see where a value came from?

Every value comes with its page and position in the original. In the **Data Fields** tab, the snippet it came from sits next to the value. In the review task, you can show the marked areas in the document.

Does PaperOffice also check whether the numbers add up?

With AI-DMS Ultra, an audit runs after reading in twelve control areas, including calculations, required fields and consistency. A calculation error appears as a finding with page and quote and shows the math, such as $410.00 + 77.90 \neq 497.90$.

How do the reviewed values get into our system?

Export the selected documents as Excel, CSV, JSON or PDF, or use the REST API or MCP. The values also stay stored on the document as data fields.

07 · HOW TO START

Test the review on your most error-prone document.

Create an account at app.paperoffice.ai, upload a typical document and build your first agent via [Actions › Agents & workflows › IDP](#). Billing is based on usage; prices are on the pricing page.

One document type, three required fields

Start with the document that causes the most queries and put the required review on its three most important fields.

Repeat the test run

Run the test several times and include scans and photos. If the values stay the same, switch the agent on in the workspace.

Assign the reviewers

Create a HITL Agent, choose who is responsible and attach it to the IDP Agent. From then on, missing values arrive as tasks for the team.

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

Audit Center

paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-center.pdf

Classification

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

MORE ON THIS TOPIC

Error rate

paperoffice.ai/en/solutions/problem/ai-error-rate-reduction-accuracy



MORE ON THIS TOPIC

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