



SHORT GUIDE · PROBLEM · MANUAL DATA ENTRY

Still retyping receipts and orders by hand?

From now on, the fields arrive already read.

Values from delivery notes, orders and receipts often reach the ERP, a spreadsheet or a case system by keyboard. This short guide shows how documents come in without detours, how an IDP Agent reads your fields and how the data moves on. For dispatch, order intake and accounting.

THE KEY POINT IN ONE SENTENCE

Describe once which fields you need: from then on, PaperOffice reads them from every new document, stores them as data fields and passes them on by export, REST API or MCP.

01 · THE PROBLEM

The data is already there. Still, someone types it.

Delivery notes, order confirmations and receipts arrive on paper, as scans or by email. To get the values into the system, someone reads every document and types numbers, quantities and dates. That takes time away from customers and routes and creates typos.

WHY IT HAPPENS

Every layout is different

Every supplier and carrier sends its own form. Fixed templates per sender take effort to maintain, so retyping remains the lowest common denominator.

Many inputs, no single flow

Paper at the front desk, scans in a folder, attachments in the mailbox. Before any typing starts, someone has to collect the documents and sort them apart.

Tables are manual work

Header fields are quick to enter, line items take time. Transferring items, quantities and units row by row costs the most time and goes wrong most easily.

HOW YOU NOTICE IT

- At month-end or after a route, documents still waiting to be entered pile up.
- Experienced staff spend hours retyping instead of dispatching or talking to customers.
- Line items get shortened or merged because there is no time for every row.
- When one person is out on vacation or sick, data entry stalls.
- The same values are typed into several systems or spreadsheets.

02 · THE WAY WITH PAPEROFFICE

Describe it once. From then on, it is read.

The path leads from intake through named fields into your system: documents arrive via scanner, mailbox, folder or smartphone, PaperOffice reads text and tables, and an IDP Agent delivers your fields as data.

1

Intake without detours

A connector picks up files from a folder via SFTP, WebDAV or S3, from an IMAP mailbox or from the Scanner Endpoint and places them in a target workspace.

[MODULE: CONNECTORS](#)

2

Split the stack

If a whole stack arrives as one PDF, the Split Agent separates it into single documents, even without separator sheets, and files each part with a clear name.

[MODULE: SPLIT AGENT](#)

3

Read text and tables

AI-OCR reads scans, photos and PDFs with the position of every line. Ultra adds tables and handwriting, such as notes on delivery notes.

[MODULE: AI-OCR](#)

4

Your fields as data

An IDP Agent reads the fields you describe, such as delivery note number, delivery date and line items. In the workspace, it runs automatically after AI-DMS processing.

[MODULE: IDP AGENT](#)

5

Pass it on instead of retyping

The values sit on the document as data fields. You export them as Excel, CSV or JSON, or send a document via REST API and get the fields back as JSON.

[MODULE: IDP AGENT](#)

03 · IN THE APP

From delivery note to record in the app.

Five steps from scanner to export. The IDP Agent is included in all plans; billing is based on usage.

1

Connect the scanner

Under **Document AI** › **Storage Mounts**, add a Storage Mount as an import source and choose **Provide as Scanner Endpoint**. On the scanner, enter the SFTP target with host, user and password from the app.

2

Automate intake

Under **Document AI** › **Connectors**, create a connector for the Scanner Endpoint or a mailbox and choose the target workspace. New files come in on a schedule.

3

Build and test the agent

Select a delivery note, then **Actions** › **Agents & workflows** › **IDP** and **Create new agent**. Pick a delivery note template or describe the fields, then **Start full test run**.

4

Run it in the workspace

Under **Document AI** › **Workspaces**, open the **IDP Agent** tab of the workspace and add the agent to the order. It then runs after every AI-DMS processing.

5

Catch up and export

Select older documents and read them with **Apply existing agent**. Via **Share & export** › **Export data**, download the data table as Excel, CSV or JSON.

TIP FROM PRACTICE

Start with one supplier and one table Pick the sender with the most documents and check the line-item table first in the test run, since that is where most of the typing is. You can add more fields to the agent later without starting over.

04 · AN EXAMPLE

A freight forwarder stops retyping.



A freight forwarder with 60 employees gets delivery notes back every day, often crumpled and with handwritten notes. Dispatch types the delivery note number, date and line items into the transport software before the invoice can go to the customer.

BEFORE

- Drivers drop off the delivery notes at the office in the evening, collected in a box.
- Dispatch types every delivery note into the transport software, row by row.
- Illegible notes lead to calls back to the driver or the customer.
- Until every delivery note is entered, the customer invoice waits.

WITH PAPEROFFICE

- In the evening, the stack goes through the network scanner straight into the delivery notes workspace.
- The Split Agent separates the stack, and an IDP Agent reads number, date and line items.
- In the Ultra tier, the agent reads the drivers' notes as a separate field.
- Dispatch exports the data as CSV and reviews the documents with open fields.

An example for illustration, not a real customer. Check which fields your software needs, whether it accepts CSV or an API, and how your scanners send files.

05 · CHECKLIST

How much is still typed by hand?

These points show where retyping costs you time and which intake pays off first.

- | | |
|--|---|
| ☐ Which document types are retyped today, and how many per month? | ☐ Which channels do they come through: paper, scanner, mailbox, folder or smartphone? |
| ☐ Which fields does your target system always need, and which occasionally? | ☐ Are there line-item tables that are transferred row by row? |
| ☐ Do stacks arrive as one PDF that first has to be split? | ☐ Do the documents contain handwriting, such as notes, signatures or quantity corrections? |
| ☐ Which sender or which form makes up the largest share? | ☐ How does your system take in data: import from Excel or CSV, or via REST API? |
| ☐ Who reviews the extracted values before they move on? | ☐ Which network device should scan straight into PaperOffice in future? |

06 · FREQUENTLY ASKED QUESTIONS

What teams ask about data entry before starting.

Do we need a template per supplier?

No. You describe the fields once in plain words, and the IDP Agent reads them from the content, even when layouts change. Templates, for example for invoices and delivery notes, make the start easier.

What about photos and handwriting?

AI-OCR reads scans, photos and PDFs, and with the Ultra tier also handwriting. For forms with handwriting and checkboxes, the agent catalog offers a free template with the Ultra Pro Max model.

What about documents in other languages?

AI-OCR detects the language of every page automatically. You set the field names in the agent, as well as the language of the extracted values and the number, date and currency format.

Are line items read row by row?

Yes. A field of type table returns every line item as its own row with the columns you define, such as item, quantity and unit. One button copies all rows for Excel.

Can we add more fields later?

Yes. You add the field to the agent, and it is included from the next run. You catch up on documents already filed by selecting them and applying the agent again.

How does the data get into our system?

As an export of the selected documents in Excel, CSV, JSON or PDF, via REST API or via MCP. Via the API, you send a document and get the fields back as JSON, for example from an n8n workflow.

07 · HOW TO START

Scan your next delivery note straight into PaperOffice.

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

Choose the intake

Decide where the documents come from: network scanner, mailbox, folder on a server or the Mobile App for photos on the road.

Build the first agent

Take the most common document, describe the fields and check in the test run whether header fields and line items are right.

Decide the handover

Agree with your IT whether the data goes into your system by export or via REST API, and test it with one day of intake.

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

Connectors

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

Network Scanner

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

Split Agent

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

Mobile App

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

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