



SHORT GUIDE • PROBLEM • SCALING

Every new site brings new stacks? Your team reviews instead of typing.

Every new site, acquisition and season brings more documents. This short guide shows how PaperOffice takes in the incoming flow, brings over existing archives, reads fields without a template per sender and points your team to the documents that need a review.

THE KEY POINT IN ONE SENTENCE

Connectors and Import bring the files in, one workspace per site keeps them apart, AI-DMS and IDP Agents read them, Workflow Agents route them, and your team handles whatever lands in review.

01 · THE PROBLEM

The volume grows. The manual work grows with it.

A new warehouse, an acquired business, the peak season: every wave brings return slips, delivery notes and invoices. If someone opens, retypes and files every document, each extra box means extra hours. Training new people often takes longer than the peak itself.

WHY IT HAPPENS

Every document is handled one by one

Upload, open, sort, retype, file: the effort is tied to each single document. More documents therefore mean more working hours for the team.

Every sender looks different

New suppliers, new forms, a new layout after an acquisition. If you work with templates per sender, every growth step means maintaining new templates.

Sites run into each other

If all sites land in one folder, everyone searches through other people's records. Permissions, filing and responsibility blur as soon as volume rises.

HOW YOU NOTICE IT

- After every seasonal peak, a backlog remains that takes weeks to clear.
- New suppliers or forms slow down data entry until someone knows them.
- An acquired business brings boxes of old files that nobody goes through.
- Your team retypes fields instead of resolving discrepancies.
- Nobody knows exactly how many documents come in each day.

02 · THE WAY WITH PAPEROFFICE

Connect the incoming flow, review the exceptions.

The path stays the same whether one folder a day or a whole archive arrives: connect the incoming flow, create one workspace per site, let the documents be read and point your team to the ones where something is missing.

1

Connect the incoming flow

Connectors watch folders via SFTP, WebDAV, S3 or reverse SSH and mailboxes via IMAP. New files arrive in the target workspace on the set interval, with no manual upload.

[MODULE: CONNECTORS](#)

2

Bring over existing archives

The import wizard takes ZIP archives, server folders and mailboxes, up to 2,000 files per job, with a preview, a SHA-256 duplicate check and a report.

[MODULE: IMPORT & MIGRATION](#)

3

One workspace per site

Each site or client gets a workspace with its own AI-DMS tier, its own group permissions and its own workspace type, all in the same account.

[MODULE: WORKSPACES](#)

4

Reading without a template per sender

AI-DMS detects the document type. The workspace's IDP Agents then read your fields from the content, each with its source location. A missing required field sends the document to review.

[MODULE: IDP AGENT](#)

5

Routing by your instruction

Workflow Agents move, rename and create tasks, following an instruction in plain words. Every run is listed with its steps and duration in the executions.

[MODULE: WORKFLOW AGENTS](#)

03 · IN THE APP

From incoming flow to metrics, step by step.

Here is how to prepare PaperOffice for more volume. You set up workspaces and Connectors once; after that, new documents come in without manual uploads and get read.

1

One workspace per site

Under **Document AI > Workspaces**, use **Create New Workspace** to create a workspace and pick the tier for new documents on the **AI-DMS** tab, for example Premium.

2

Assign IDP Agents

In the same dialog, set the IDP Agents on the **IDP Agent** tab. They run after AI-DMS in the order you choose.

3

Connect the incoming flow

Under **Document AI > Connectors**, use **Create connector** to pick a Storage Mount folder or a mailbox, plus target workspace and interval.

4

Import existing archives

Select the workspace, choose **Actions > Import Documents**, pick the source, check the file count and size in the review step and start.

5

Volume and reviews at a glance

Analytics AI > Activity & Processing shows uploads per calendar day and a user ranking. The **IDP Review** view in the document list shows documents with open fields.

TIP FROM PRACTICE

One site first, then the rest Set up the process for one site first and look at the reviews for a few days. Once fields and tier fit, create the other workspaces with the same settings.

04 · AN EXAMPLE

A second warehouse before the season.



An online retailer of sportswear with 60 employees opens a second warehouse. Return slips, carrier delivery notes and invoices arrive by scanner and email. The team lead of the returns department works with five people, and peak season is coming.

BEFORE

- Scans from both warehouses land in one shared folder.
- Every return slip is opened and retyped into a list.
- Someone on the team first has to explain new carrier forms.
- For the season, temporary staff arrive who need training first.

WITH PAPEROFFICE

- One Connector per warehouse brings the scans into its own workspace.
- An IDP Agent reads order number, item and return reason with their source.
- If a required field is missing, the document goes to review.
- The team lead sees uploads per day and shares out the reviews in the team.

A made-up example for illustration. Use your own documents to check which fields should be required and which AI-DMS tier your records need.

05 · CHECKLIST

Ready for the next wave of documents?

Ideally, settle these points before the next site, the next acquisition or the next season.

- | | |
|---|---|
| ☐ Through which channels do documents arrive today: scanner, NAS, mailbox, upload, bucket? | ☐ Which sites, departments or clients need separate permissions? |
| ☐ Which AI-DMS tier do the documents in each workspace need? | ☐ Which fields must every document deliver, and which of them are required? |
| ☐ Who handles documents where a required field is missing? | ☐ Which existing archives should be brought over, and into which workspaces? |
| ☐ Should originals stay on your own storage? Then a Connector in Index mode fits. | ☐ What should happen to the source file after import: keep, move or delete? |
| ☐ Which steps after reading can a Workflow Agent take over? | ☐ Who regularly looks at incoming volume and open reviews? |

06 · FREQUENTLY ASKED QUESTIONS

What to settle before you grow.

What happens during a peak?

Connectors fetch new files on the set interval, from one minute in Import mode. Every file runs through the AI-DMS tier of its workspace, and your team works through the reviews at its own pace.

Does this scale across sites and clients?

Yes, through workspaces. Each one has its own AI-DMS tier, its own group permissions and a workspace type from Standard to Compliance. A new site is one more workspace in the same account.

Can files stay on our own storage?

Yes. A Connector in Index mode leaves the originals on your storage, makes them searchable and follows every change, up to 200,000 files per sync.

How does an existing archive get in?

Through the import wizard: a ZIP up to 5 GB, a Storage Mount folder or a mailbox, up to 2,000 files per job. Split larger archives into several jobs, each with its own report.

Do new suppliers need a new template?

An IDP Agent reads fields from the content, and you describe them in plain words. **Start full test run** shows whether it reads consistently, up to 10 times in a row on the same document if you like.

How do we see the workload?

Analytics AI › Activity & Processing shows uploads per calendar day, active days and a user ranking, with CSV export. Pages, storage and trends come from the REST API. Analytics AI is included in the Corporate plan.

07 · HOW TO START

Start with the site that brings the most paper

Create a workspace for that site, connect its intake with a Connector and let the first documents be read. Billing is based on usage, and the pricing page shows the details.

Read the datasheets

Connectors, Import, Workspaces, IDP Agent, Workflow Agents and Analytics AI each have their own datasheet with menu paths.

Test with an old archive

A small ZIP of typical documents is enough for a first import and shows what AI-DMS reads from it.

Plan it together

For several sites or clients, we are happy to plan the workspace layout with you through the contact page.

DATASHEETS ON THIS TOPIC

Connectors

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

Import & Migration

paperoffice.ai/downloads/paperoffice-ai-datasheet-import-migration.pdf

Workspaces

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

IDP Agent

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

Workflow Agents

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

Analytics AI

paperoffice.ai/downloads/paperoffice-ai-datasheet-analytics-dashboard.pdf

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