

# Configuration

- Tags, Document Types, Correspondent & more
- SMTP Setup

# Tags, Document Types, Correspondent & more



**Paperless-ngx** is a wonderful tool to scan, classify, and organize your documents. In this article, we'll discuss three important organizational elements: *Document Types*, *Correspondent*, and *Tags*. Along the way, we'll ask guiding questions to help you figure out how best to categorize any piece of paperwork you might want to store in Paperless-ngx.

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## Document Types

Document Types refer to the broad category of the document in question. Is it a letter, a receipt, or a bill? You don't need to overthink this category; just assign the document to a generalized type. For example, you might have a *Receipts* doctype for all the receipts you scan in, or even confirmations you receive after paying certain bills.

- **Are you dealing with a financial record, such as a bill or a receipt?**

This helps to quickly decide if it goes under "Receipts," "Invoices," or a more generic "Bills" type.

- **Does the document represent correspondence or general information?**  
If so, you might use a “Letters” or “General Correspondence” document type.
- **Do you plan to reuse this broad category for similar documents in the future?**  
If yes, naming it broadly (e.g., “Medical Documents” or “Insurance Papers”) could be helpful.

## Correspondent

The Correspondent is the person or organization associated with the document. A credit card bill from Capital One would have “Capital One” as the correspondent. A W2 might have the IRS as the correspondent. Broadly defining your correspondent is key so you don’t complicate future searches with overly specific labels.

- **Which entity sent or provided this document?**  
Typically, it’s the name you see on the letterhead or the company from which you received the bill or notice.
- **Is it important to narrow down the specific department or branch?**  
Most of the time, you can stick to the main organization or sender name, unless you have a strong need to differentiate them.
- **Will you have many documents from the same company or individual?**  
If yes, consistent naming (e.g., “IRS” vs. “Internal Revenue Service”) will help you find them easier later.

## Tags

Tags let you categorize documents by answering basic questions like *who*, *what*, and *when* the document references. They can also be used for special categories or important groups of documents.

- **Who is this document referring to?**  
You might have tags for yourself, your spouse, your children, or pets—anything that quickly identifies whom the document is about.
- **What is it referring to?**  
Is it related to a car loan, home maintenance, or health records? Use a separate color or naming convention to mark these.
- **When is this information relevant?**  
You might create tags for each year (e.g., “2022,” “2023”) or even by month, if needed, so that you can later filter by time periods.
- **Does it belong to a special or critical category?**  
If it’s crucial for annual taxes or contains personal legal information, you can tag it “Taxes” or “Important” to quickly filter it out.

# OCR Considerations

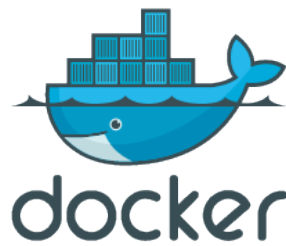
Optical Character Recognition (OCR) is undoubtedly helpful for searching within the text of scanned documents. However, it shouldn't be your only search strategy. Combining OCR with at least 1–2 well-chosen metadata fields (like Document Type or Correspondent) plus relevant Tags can make finding a specific document much easier—especially when you have years and years of paperwork.

## Garbage In, Garbage Out

Like with any data system, the quality of your searches in Paperless-ngx is only as good as the data you choose to include. Spend a little extra time specifying at least one metadata field and adding a couple of relevant tags. This way, when you need to find an important document, you can rely on your carefully curated system to do the work for you.

In summary, **Document Types**, **Correspondent**, and **Tags** form a powerful trifecta in Paperless-ngx to keep your records neat and easily searchable. Leverage OCR, but don't depend on it alone. And remember: the small effort to add good data up front will pay big dividends when you need to retrieve those documents later.

# SMTP Setup



Setting up an SMTP server for the backend in **Paperless-ngx** allows you to send emails directly from the system, most commonly for password reset purposes. These environment variables closely mirror the corresponding [Django email settings](#), ensuring easy configuration.

## Environment Variables

- **PAPERLESS\_EMAIL\_HOST** (default: `localhost`)
- **PAPERLESS\_EMAIL\_PORT** (default: `25`)
- **PAPERLESS\_EMAIL\_HOST\_USER** (default: `"`)
- **PAPERLESS\_EMAIL\_FROM** (default: *same as PAPERLESS\_EMAIL\_HOST\_USER* if not set)
- **PAPERLESS\_EMAIL\_HOST\_PASSWORD** (default: `"`)
- **PAPERLESS\_EMAIL\_USE\_TLS** (default: `false`)
- **PAPERLESS\_EMAIL\_USE\_SSL** (default: `false`)

To configure these in a Docker environment, simply add them to your **docker-compose.yml** under the `environment` section of the paperless-ngx service. For example:

```
services:
  paperless-ngx:
    image: ghcr.io/paperless-ngx/paperless-ngx:latest
```

environment:

- PAPERLESS\_EMAIL\_HOST=smtp.yourprovider.com
- PAPERLESS\_EMAIL\_PORT=587
- PAPERLESS\_EMAIL\_HOST\_USER=youremail@provider.com
- PAPERLESS\_EMAIL\_HOST\_PASSWORD=supersecretpassword
- PAPERLESS\_EMAIL\_FROM=youremail@provider.com
- PAPERLESS\_EMAIL\_USE\_TLS=true

Once set, Paperless-ngx will use these SMTP settings to send necessary notifications, such as password reset emails. Adjust values as needed based on your email provider's requirements.

It's generally best practice to use TLS or SSL for secure email communication. Make sure you enable the correct protocol flags ( `PAPERLESS_EMAIL_USE_TLS` or `PAPERLESS_EMAIL_USE_SSL` ) for your provider.