SCANEE

WHITE PAPER

No-code ERP connectors

What Scanee reads from and writes to Business Central, QuickBooks Online, Sage Accounting, Odoo and Xero

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DOCUMENT STRUCTURE

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In short

- Scanee connects directly to five accounting systems: Microsoft Dynamics 365 Business Central, QuickBooks Online, Sage Accounting, Odoo and Xero. You connect from Scanee, with an account in your ERP, with no development and nothing to install.
- From the ERP to Scanee: your suppliers, your GL accounts, your cost centres or dimensions and, depending on the ERP, your employees. Each invoice is coded with your own codes.
- From Scanee to the ERP: the vendor invoice, with its lines, its coding, the original PDF and a reference that points back to the document in Scanee.
- Nothing leaves without someone on your team acting: a manual export, or setting the invoice to Completed. A supplier the ERP doesn't know blocks the export instead of being guessed.
- Once sent, the document's reference in the ERP and a direct link show in Scanee. Scanee never posts a document.
- For any other system: a CSV, Excel or JSON file in the column layout you choose, Google Sheets, Excel Online, Zapier, Make, a webhook or the API.

01 How a connection works

1. An administrator of your Scanee account opens **Integrations**, clicks **Add a connection** and picks the ERP.
2. They authorize Scanee. For Business Central, QuickBooks Online, Sage and Xero, the vendor's sign-in page opens: you sign in with your usual account and accept the requested access. For Odoo, you enter the instance address, the database, the user and an API key.
3. They choose the target: company, business, organisation, depending on the ERP.
4. They create a project from the ERP's template. The template imports suppliers, accounts and cost centres right away, and sets up the fields: number, dates, supplier, account, cost centre, currency, tax zone, amounts, lines.

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ERP	Authorization	Access requested	Target
Business Central	Microsoft account (Entra ID)	Read and write financial data, offline access	Environment (Production, Sandbox or other) and company
QuickBooks Online	Intuit account	Accounting data	The authorized company
Sage Accounting	Sage account	Full access to the business	Business
Odoo	A user's API key	That user's rights	Company
Xero	Xero account	Invoices, contacts, settings, attachments, offline access	Organisation

Access tokens and the Odoo API key are encrypted (AES-256). If an authorization expires or is revoked, the connection turns red with a **Reconnect** button. You can create several connections to the same ERP, one per company for example, and choose which one each project uses.

ERP connectors are included in every plan, from Starter, with no integration fees.

02 What syncs in each direction

Data	Direction	When
Suppliers, GL accounts, cost centres or dimensions	ERP → Scanee	When the project is created, then on demand ("Refresh from integration")
Employees (Business Central, QuickBooks Online, Odoo)	ERP → Scanee	Same, for receipts and expense claims
Tax rates (Sage, Odoo)	ERP → Scanee	At each export
Vendor invoice: header, lines, coding, taxes depending on the ERP	Scanee → ERP	On manual export or when set to Completed

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Data	Direction	When
Original PDF and Scanee reference	Scanee → ERP	With the document created
New supplier or employee	Scanee → ERP	Only when an administrator confirms it
Reference and link of the document created, or the reason it failed	ERP → Scanee	When the export finishes

> What does not come back from the ERP: payments, posting, and changes made after the export. Scanee doesn't read your entries or balances, doesn't change a document once it has created it, and deletes nothing.

Receipts and expense claims follow the same path: they are created as vendor invoices, once Scanee has checked that the employee exists in the ERP.

ERP	Document created	State on arrival	Taxes	Analytics
Business Central	Purchase invoice	Unposted	Line taxable or not; calculated by Business Central	Dimension values
QuickBooks Online	Bill	Recorded, open	Not sent	Classes
Sage Accounting	Purchase invoice	Created in Sage	Rate and amount per line	Analysis categories
Odoo	Vendor bill	Draft	Odoo purchase taxes per line	Analytic accounts
Xero	Bill	Draft	The account's default rate	Tracking categories

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03 Microsoft Dynamics 365 Business Central

Connection. A Microsoft account with access to Business Central; Scanee acts with its rights. Depending on your Entra tenant's policy, an administrator may need to approve the app. You choose the environment, then the company.

Imported. Suppliers (number, name, tax number, currency), posting accounts (total and heading accounts are left out), the values of every dimension, active employees, vendor posting groups.

Created. A purchase invoice: supplier, the supplier's invoice number, invoice and posting date, due date, currency. One Account-type line per invoice line, with description, quantity, unit cost and account; with no extracted lines, one line for the amount before tax. Dimensions on the lines and the header, the Scanee reference and notes as comment lines, PDF attached.

Export and number. When set to Completed with the Business Central template, or on manual export. Scanee shows the purchase invoice number and a link that opens it.

Known limits.

- No tax amount is sent: each line gets the TAXABLE or NONTAXABLE tax group, and Business Central calculates the tax.
- The supplier needs a vendor posting group; otherwise the export fails with a message that says so.
- A line with no account gets a default expense account: check that field before setting the invoice to Completed.

04 QuickBooks Online

Connection. Intuit account. One connection is one QuickBooks company.

Imported. Active suppliers, active expense and cost of goods sold accounts, active classes and locations (departments), active employees.

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Created. A Bill: supplier, reference number (the supplier's invoice number), date, due date, currency, the Scanee reference in the memo. One account-based expense per line, with amount, description, account and class. PDF attached.

Export and number. When set to Completed with the QuickBooks template, or on manual export. Scanee shows the reference number and a direct link.

Known limits.

- No tax code is sent: GST, QST or HST are not broken out. With lines, the Bill carries their amounts; with no lines, a single line carries the total, taxes included.
- Only classes are sent; locations are imported but not applied.
- An invoice in a foreign currency needs multicurrency turned on in QuickBooks.
- A line whose account isn't recognized gets a default expense account.

05 Sage Accounting

This connector covers Sage Accounting (Sage Business Cloud Accounting), the online product. It doesn't cover Sage 50, Sage 300 or Sage Intacct.

Connection. Sage account; you choose the business if the account has several.

Imported. Supplier contacts, ledger accounts available for expenses, analysis categories. Tax rates are read at each export.

Created. A purchase invoice: supplier, supplier reference, date, due date, Scanee reference, notes. Each line carries description, account, quantity, unit price, net amount, tax rate and tax amount, analysis category. PDF attached.

Taxes. Scanee picks the Sage rate closest to the invoice's actual rate. The tax zone, when given, takes precedence: Quebec 14.975%, Ontario 13%, federal 5%, Maritimes 15%. A tax-exempt invoice gets a zero rate.

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Export and number. When set to Completed with the Sage template, or on manual export. Scanee shows the supplier's invoice number as recorded in Sage, with a direct link.

Known limits.

- With Sage Accounting Start, the API refuses purchase invoices. Scanee then tries a quick entry on a single line; if that is refused too, a message asks for the Standard subscription.
- The currency isn't sent. If the business has no taxable rate, the tax is added to the expense.
- A line whose account isn't recognized gets a default expense account.

06 Odoo

Connection. No sign-in page: the instance address (Odoo Online, Odoo.sh or your own server), database, user and an API key, created in the user's preferences, Account Security tab. The key carries that user's rights: set up a dedicated user, limited to invoicing. The instance must be reachable from the internet.

Imported. Suppliers, chart of accounts, analytic accounts, employees. Purchase taxes are read at each export.

Created. A draft vendor bill: partner, supplier reference, dates, company, the Scanee reference as an internal note. Each line carries label, quantity, unit price, account, analytic distribution (100% to the chosen account) and taxes. The PDF is attached as the main document.

Taxes. Based on the tax zone: Quebec, the combined 14.975% tax if it exists, otherwise GST 5% and QST 9.975%; Ontario, HST 13%; federal, 5%; Maritimes, 15%; British Columbia, 12%; exempt, 0%. With no zone, Scanee starts from the actual rate. Odoo then recalculates the amounts.

Export and number. The Odoo invoice template doesn't export automatically: you export from the list or the document, or an administrator adds the export on Completed. Odoo numbers the bill when it is confirmed; while it is a draft, Scanee shows the supplier reference and a link.

Known limits.

- The currency isn't sent: the bill takes the company's currency.

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- The analytic distribution follows the format of recent Odoo versions.

07 Xero

Connection. Xero account; you choose the organisation.

Imported. Supplier contacts (or active contacts if none is marked as a supplier yet), active accounts, tracking categories and their options.

Created. A draft Bill: contact, invoice number, dates, currency, Scanee reference. Each line carries description, quantity, unit amount before tax, account code and tracking category. PDF attached.

Export and number. When set to Completed with the Xero template, or on manual export. Scanee shows the invoice number and a direct link.

Known limits.

- Scanee doesn't choose the tax rate: Xero applies each account's default rate. Check that your expense accounts carry the right rate.
- Employees aren't imported; a receipt is created under the merchant's or the employee's name.
- The import stops at 5,000 suppliers.
- Exporting to Xero is turned on by creating the project from the Xero template.
- A line whose account isn't recognized gets a default expense account.

08 When the ERP isn't connected

Route	What you get	Plan
CSV, Excel or JSON file	The columns you set once in the project's Exports tab: name, order, separator, date format; one row per invoice or per invoice line	All
Google Sheets, Excel Online	Each checked invoice is added to the workbook, with a link to the document	All

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Route	What you get	Plan
Zapier, Make	The data goes to the apps you connect there	Pro and Scale
Webhook	The data is sent to your address, on the status you choose, with a delivery log	Pro and Scale
API	Your system reads the documents itself	Pro and Scale

Each ERP template also includes a CSV export, turned off by default, to keep as a fallback. Sage 50, Acomba and Avantage have no direct connection: the export goes through a file.

09 Controls

Nothing is sent without a human step. An invoice leaves when someone exports it, or when someone sets it to Completed after checking it, with the document next to the data. The triggering status is set in the project's Exports tab. We recommend keeping it on Completed.

The supplier is never guessed. Scanee finds it by its ERP ID, then by exact match: number, name or tax number depending on the ERP. If it doesn't exist, the export is blocked and a window offers to create it from the extracted details; only an administrator can confirm. The same rule applies to an employee. A supplier deleted in the ERP is detected at export time.

The export status is visible. On each invoice: in progress, exported (reference and link), or failed, with the reason: supplier or employee missing, authorization expired, no company selected, vendor posting group missing, multicurrency off, Sage subscription too limited.

The trail runs both ways. The Scanee reference (for example "SCN: AP/#1042", fictional) is written in the ERP, the ERP's reference comes back to Scanee, and the PDF is attached to the document.

A second export creates a second document. The reference shown on the invoice tells you it has already gone.

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10 Questions ERP administrators ask

Do we need to install anything in the ERP? No. Scanee uses each vendor's public API. For Odoo, an API key is enough.

What rights should we grant? Those of a user who can create suppliers and vendor invoices. The access requested is sometimes broader than what is used: Scanee reads the lists described here and writes only vendor invoices, their attachments, and the suppliers or employees you confirm.

Can we test without touching production? Yes: the Sandbox environment in Business Central, a test database in Odoo, the demo organisation in Xero. For QuickBooks Online and Sage, a trial company from the vendor connects like any other.

We have several companies. Create one connection per company and link each project to its own. Accounting firms do the same, one project per client.

Do the lists update on their own? No. They are imported when the project is created, then on demand, including while an invoice is being checked. The import reads up to 10,000 suppliers and 10,000 accounts, except in Xero (5,000 suppliers); in Sage, it reads the first 200 analysis categories.

Where does our data go? Files and data are hosted in Canada. Documents are processed by the AI in the United States, at Google, and the AI doesn't train on your documents. Data goes from Scanee's servers to your ERP's API. See also Scanee's security and privacy overview.

Conclusion

A Scanee connector reads your reference lists to code each invoice with your own codes, then creates the vendor invoice in your ERP, with its lines, its PDF and a cross-reference. Posting stays in the ERP, and every export follows a human check. The limits described here, especially for taxes in QuickBooks Online and Xero, can be checked on a handful of invoices.

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Next step. During the free 14-day trial, with no credit card, connect your ERP on a test environment, create a project from its template and send five real invoices. Check the supplier, accounts, taxes and attachment in the ERP. For a demo with your ERP, write to us from scanee.ai.

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