SCANEE

WHITE PAPER

Scanee user guide

For the accounts payable team: receive, review, code, validate and export your invoices

PUBLISHED BY

Scanee (scanee.ai)

© 2026 Scanee.ai — All rights reserved.

DOCUMENT STRUCTURE

Contents

	In brief	03
01	Key concepts	03
02	A typical day	04
03	Create and set up a project	05
04	Bring documents in	08
05	Review side by side and correct	09
06	Code to accounts	10
07	Validate before export	11
08	Export	11
09	Team and roles	13
10	Track credit usage	13
11	Frequently asked questions from the team	14
	Conclusion	15

© 2026 Scanee.ai — All rights reserved.

In brief

- Scanee reads your invoices and extracts their data in about 2 seconds per document, with a measured accuracy of 99.4% on extracted fields. Your team stops typing and starts reviewing, with the document shown next to the extracted values.
- Everything is organized in projects. A project holds one type of document, its fields, its AI instructions, its account lists and its exports. A pre-built template creates a project ready for your accounting software.
- Invoices come in by drag and drop, from your cloud drives, by email (Pro and Scale plans) or through the API.
- Vendors, GL accounts and cost centres come from your ERP or a spreadsheet. The AI picks the value from your lists; you confirm or correct it.
- A reviewed invoice is set to "Completed", then goes to your ERP with its PDF, to a spreadsheet, to a CSV or Excel file, or to a webhook.
- Every step in this guide is filmed in a video guide, at scanee.ai/guides and in the app ("Scanee guides").

01 Key concepts

Concept	What it is	Where to find it
Workspace	Your organization's account: users, projects, connections, plan and language	Left-hand menu, "Settings"
Project	A set of documents of the same kind (for example "Vendor invoices 2026"), with its own fields, instructions, receiving address, exports and members. An accounting firm usually creates one project per client	"Projects"

© 2026 Scanee.ai — All rights reserved.

Concept	What it is	Where to find it
Field	A piece of information extracted from every document: invoice number, vendor, due date, GST, QST, line items. Its name, type and description guide the AI	Project settings, "Fields" tab
Reference list	A "List" field fed by your ERP, a spreadsheet or a CSV file: vendors, chart of accounts, cost centres	"Fields" tab
Credit	The unit of consumption. One credit usually covers a standard document of one to three pages; a more complex document may take more	Left-hand menu, "Billing"

Each document has a status, shown in the list and editable in the open document.

Status	Meaning
"New"	The document has just entered the project and is waiting for extraction, for example when channel automation is off
"Processing…"	Scanee is reading the document and extracting its data
"Reviewing"	The data is extracted; the document is waiting for your review
"Completed"	The document is reviewed and ready to export
"Split"	A batch was split into several documents
"Failed"	Processing did not succeed; the document can be reprocessed

02 A typical day

1. **Receive.** Invoices arrive in the project through its email address, by drag and drop, from a cloud drive or through the API. Scanee processes them as they arrive.
2. **Review.** You open each "Reviewing" document: the invoice on the left, the extracted fields on the right. You compare vendor, number, dates, amounts and taxes, and you correct.

© 2026 Scanee.ai — All rights reserved.

3. **Code.** The account and cost centre are already suggested, on the header and on each line, from your ERP's lists. You confirm or pick another value.
4. **Validate.** You save, then set the document to "Completed".
5. **Export.** You select the completed documents and export them. An export can also run on its own when a document is set to "Completed".

At the end of the day, filter the list by status: whatever is still "New" or "Reviewing" is pending. A "Completed" document with no ERP invoice number has not yet reached the ERP.

03 Create and set up a project

Three ways to start

In "Projects", click "Create a project". Enter a name and a short identifier (the "Project ID", which forms the project's email address). Then choose how to create the fields.

Option	When to choose it	What happens
"Pre-built Template & Export"	Your accounting software is on the list, or you process invoices, receipts or bank statements	Fields, lists and exports are created. With a connected ERP, vendors, accounts and cost centres are synced as soon as the project is created
"Detect with AI"	Your documents have a specific layout	You attach a sample document and click "Detect Fields". You adjust the suggested fields, then "Create"
"Blank project"	You want to define everything yourself	You add the fields in the "Fields" tab

The vendor invoice templates cover Business Central, QuickBooks, Sage Accounting, Odoo, Xero, Sage 50, Acomba and Avantage, plus a generic "Invoice project". "Duplicate project" starts from an existing project's setup, for example for a new client.

© 2026 Scanee.ai — All rights reserved.

Video guides: "Create your first project", "Create a project with AI".

A project's tabs

Open the project, then the Settings icon at the top of the document list. Only the project's creator and workspace administrators can change these settings.

Tab	What you set there
"General"	Name, ID, description; the AI instructions ("AI Context & Intelligence"); processing "Automation"; batch splitting
"Fields"	The fields to extract, their order, types, descriptions and lists
"Receiving"	The project's email address, its "Approved Senders", the ingestion API and its keys
"Exports"	Export configurations
"Storage"	Archiving to your own storage, and "Data Retention & Privacy"
"Members"	Who has access to the project, and their role

Fields

In "Fields", click "Create field". Three settings matter:

- **the name**, as your team knows it: "Vendor GST number" rather than "Tax 1";
- **the type**: "Text", "Number", "Date", "List" (a value picked from a reference list), "Table" (line items and their columns), "Checkbox", "Formula";
- **the description** ("Description (AI Instructions)"): this is what tells the AI what to look for. Write it as an instruction, with the expected format: "Vendor GST number, formatted as 123456789 RT0001".

You can also manage fields from an open document, with the gear icon in the "Document Details" panel.

Video guide: "Create fields".

© 2026 Scanee.ai — All rights reserved.

The project's AI instructions

The "AI Context & Intelligence" section of the "General" tab takes an instruction, written in plain language, that applies to every document in the project. The description sets up one field; the project instruction sets up the whole.

> Fictional example: "Vendor invoices for a construction company in Quebec. Amounts in Canadian dollars unless stated otherwise. Always split GST and QST. If the invoice shows a job site number, copy it to the Project field."

Reference lists

Source	How	Update
Your connected ERP	Created by the pre-built template: vendors, chart of accounts, cost centres	"Sync now" (or the "Refresh from integration" icon)
Google Sheets or Excel Online	"Link with Integration List", then the workbook and the tab	"Sync now", after editing the spreadsheet
A CSV file	"Import from CSV" (a template is available: "Download CSV Template")	New import

With "Auto-resolve with AI", the AI matches what it reads to a value in the list. An instruction specific to the list sets the rule, for example "Use the vendor name to find the cost center".

Video guide: "Connect Scanee to Google Sheets or Excel".

Batches, automation and retention

- **Batches.** A PDF holding several invoices is split, one invoice per document, when "Enable Document & PDF Splitting" is on in "General". Video guide: "Split a PDF batch".

© 2026 Scanee.ai — All rights reserved.

- **Automation.** Channel by channel ("Manual Upload (UI)", "Email Ingestion", "API Ingestion"), you choose whether extraction starts when a document arrives. When it is off, documents come in unprocessed and you start them yourself.
- **Retention.** In "Storage", "Enable Auto-Deletion" sets a "Retention Period (Days)" and a "Deletion Mode": files only, or files and data. Until you turn it on, documents stay until you delete them.

04 Bring documents in

Channel	Where	Plans
Drag and drop, or "From this computer"	In the middle of the project screen	All
"From your Cloud drives"	Google Drive, OneDrive, Dropbox or SharePoint, connected in "Integrations"	All
Email	"Receiving" tab	Pro and Scale
Ingestion API	"Receiving" tab	Pro and Scale

Accepted formats: PDF and images (PNG, JPEG, WEBP, TIFF, HEIC, BMP).

Drag and drop. Drop one or more invoices in the middle of the project screen, then click "Upload". The status changes to "Processing…", then to "Reviewing". Video guide: "Import by drag and drop".

Cloud drives. The project's import button offers "From your Cloud drives": you browse your folders, check the documents and click "Import". The other way round, "Enable automatic archiving" ("Storage" tab) files completed documents in your drive. On the Scale plan, archiving can also target Amazon S3, Google Cloud Storage, Azure Blob Storage or SFTP.

Importing is manual: Scanee does not watch your cloud folders.

© 2026 Scanee.ai — All rights reserved.

Email. The project's address is shown in "Receiving", under "Inbound Email". Click "Copy" and give it to your vendors, or forward the invoices you receive to it as attachments. Only "Approved Senders" are accepted: add each address, press Enter, then save. An entry starting with "@" (for example @fictional-vendor.ca) accepts the whole domain. If you change the Project ID or the workspace identifier, the address changes: let your vendors know. Video guide: "Receive invoices by email".

> Tip: in Outlook or Gmail, a rule can automatically forward emails that contain an invoice to the project's address. Approve your own address as a sender.

API. For a scanner, line-of-business software or a script, the "Receiving" tab gives the API address and lets you "Create API Key". The key is shown only once: copy it right away. Limits: 25 MB per file, 25 files per request, PDF, PNG, JPEG, WEBP, TIFF and HEIC formats. Details are in the "Scanee API and webhook integration" guide.

05 Review side by side and correct

Click a document in the list, then open the "Document Details" panel (icon on the right of the toolbar): the invoice on the left, the extracted fields on the right. "Show detected objects" highlights on the invoice where the AI read the values.

Check in this order:

1. **the vendor**, which drives coding and export;
2. **the number and dates**: invoice, invoice date, due date;
3. **the amounts**: subtotal, GST, QST or HST, total;
4. **the lines**: the "Invoice Lines" field can be read line by line or as a grid ("View Grid"); "Add Row" fills in a missing line;
5. **the coding**: account and cost centre (section 6).

© 2026 Scanee.ai — All rights reserved.

Correct in the field, then click "Save". Then open the status menu at the top of the document and choose "Completed". On the keyboard, "Quick validate (Completed)" does the same; the list of shortcuts is under "More actions", "Keyboard Shortcuts".

Video guide: "Review and approve an invoice".

The AI Assistant. The "AI Assistant" tab, next to "Document Details", answers your questions about the open invoice ("Check amounts and sales tax", "Verify vendor information") and can suggest filling in a field. It changes nothing without your consent: each suggestion appears in an "Approval required" box. It can also match a bank statement against a project's invoices. Video guides: "Use the AI Assistant", "Reconcile a bank statement".

Each exchange with the AI Assistant uses credits, depending on its length.

Notes and history. The "Notes" section holds the team's comments. The "History" section lists every edit, export or deletion, with the old and new value, who made it and when.

Reprocess. "Reprocess document" runs extraction again, for example after refining a description. This uses new credits.

06 Code to accounts

Coding uses fields fed by your reference lists. Example with the Business Central template:

Where	Fields	Source of values
Header	"Vendor Name", "G/L Account", "Cost Center"	Lists synced with the ERP
Each line of "Invoice Lines"	"G/L Account", "Cost Center"	The same lists, as columns
Taxes	"Tax Zone", tax amounts	Extraction and the list of tax zones

© 2026 Scanee.ai — All rights reserved.

Names vary by template ("Expense Account" in the Sage 50 template, for example). For each list field, the AI suggests a value; you confirm it or pick another. If an account is missing, create it in the ERP, then click "Sync now".

Better suggestions. If the AI often picks the wrong account, write the rule in the field's description or in the list's instruction: "Electricity invoices always go to the Electricity account".

New vendor. If the vendor does not exist in the ERP, the export stops and offers "Create vendor". A form pre-filled from the invoice opens ("New Vendor Detected"): you check it, then create the vendor in the ERP without leaving Scanee. Only a workspace administrator can create the vendor. This is available with Business Central, QuickBooks Online, Sage Accounting, Odoo and Xero.

07 Validate before export

Control before export rests on three things.

1. **The "Completed" status.** It shows that a person has reviewed the document. A simple team rule: nothing leaves until the document is "Completed".
2. **Roles.** In the "Members" tab, the "Reader" views documents; the "Editor" and the "Admin" can also select and export in bulk. The person who reviews need not be the one who sends to the ERP.
3. **Status-triggered export.** With "Auto-Trigger on Statuses" set to "Completed", an export configuration runs as soon as a document is validated, and only then.

Each document's "History" records who validated and exported it, and when.

08 Export

Exports are set up once per project: "Exports" tab, "Add configuration", a name, a destination. Pre-built templates already create the exports for their software.

© 2026 Scanee.ai — All rights reserved.

Destination	What is sent	What to prepare
Business Central, QuickBooks Online, Sage Accounting, Odoo, Xero	The invoice is created in the ERP with its lines and the PDF attached; a reference then shows in Scanee (tax handling varies by ERP: see the ERP connectors white paper)	Connection in "Integrations"
Google Sheets, Excel Online	One row per invoice or per line item, in the chosen workbook and tab	Connection in "Integrations"
CSV, Excel or JSON file	A downloaded file, with your columns	Nothing
Webhook (Zapier, Make, your own system)	The data sent to the address you enter	The address and, if needed, authentication; Pro and Scale plans
Sage 50, Acomba, Avantage	A CSV in the software's import format	The built-in "Import Guide", step by step

Export a selection. In the list, turn on "Select multiple", check the documents, click "Export" and choose the configuration. For a single open document: "More actions", then "Send to".

Set the columns. The "Field Mapping" is pre-filled: each field becomes a column. Remove, rename, add a fixed value ("+ Define a fixed / constant value..."), set date and number formats. "Auto-map with AI" suggests a mapping from an instruction, for example "Export for QuickBooks with invoice totals, vendor name, and dates as YYYY-MM-DD". The workspace's defaults are set in "Settings", "Default Export Formats".

Webhook. The "Webhook Delivery Logs" show each delivery and its response code, and let you "Resend" a failed one.

Video guides: "Set up an export", "Connect your ERP and export", "Connect Scanee to Google Sheets or Excel".

© 2026 Scanee.ai — All rights reserved.

09 Team and roles

In the left-hand menu, "Users", then "Invite a user": the email address, the role, then "Send Invite". Invitations not yet accepted stay under "Pending invitations", where you can resend or cancel them. Video guide: "Invite a user".

Level	Role	What it allows
Workspace	"Admin"	All projects, plus "Users", "Billing", "Integrations", "Settings"
Workspace	"Viewer"	The projects they created or are a member of, without the admin menus
Project ("Members")	"Admin", "Editor"	Process documents, including bulk selection and export
Project	"Reader"	Views the project's documents

Sample setup: the controller is workspace "Admin"; the accounts payable clerk is "Viewer" in the workspace and "Editor" on the project; a department head who looks up their invoices is "Reader". The number of users depends on the plan: 1 on Starter, up to 5 on Pro, up to 10 on Scale.

10 Track credit usage

A credit counter is shown in the left-hand menu. The details are in "Billing" (admins only): the "Credit Balance", your plan and, during the trial, the days remaining, then each usage entry, filterable by "Date range", "Project" and "User". The "Pricing guide" explains how each kind of processing is counted.

Action	Uses credits
Processing a document when it arrives	Yes
"Reprocess document"	Yes, again
Splitting a batch	Yes

© 2026 Scanee.ai — All rights reserved.

Action	Uses credits
"Auto-map with AI", AI matching to lists, "AI Assistant"	Yes
Viewing, correcting, changing a status, exporting (ERP, spreadsheet, file, webhook)	No

Plan	Price per month	Credits per month
Starter	$39	500
Pro	$99	1,000
Scale	$199	2,500

Prices in Canadian dollars; Enterprise plan priced on request.

When the balance runs out, the counter shows "Insufficient Credits": new processing no longer starts. On the Pro and Scale plans, "Enable pay-as-you-go" lets you keep going: each extra credit is billed $0.01 at the end of the cycle, with a payment method on file.

> To save credits: turn off "Automation" on a channel that also receives documents you will discard, and reprocess only after fixing the instruction or description at fault.

11 Frequently asked questions from the team

Does the AI approve invoices for us? No. It extracts and suggests. A person reviews, saves and sets the document to "Completed". The AI Assistant asks for your consent before any change.

A field is often misread. Refine its description in "Fields", with the expected format and an example. For a vendor-specific rule, add it to the project instruction. Reprocess one document to check.

A vendor's invoices don't arrive by email. Check that their address, or their domain preceded by "@", is in the "Approved Senders", and that the invoice is an attachment.

© 2026 Scanee.ai — All rights reserved.

An invoice in US dollars? Invoice templates include a "Currency" field. Check it on every foreign invoice and state your rule in the project instruction.

Who changed this amount? The document's "History" section shows the old value, the new one, who made the change and when.

The invoice did not reach the ERP. The export message gives the cause. The two most common: the vendor does not exist in the ERP ("Create vendor"), or the connection needs to be redone ("Action required" in "Integrations", then "Reconnect").

Several companies or several clients? One project per entity or per client, each with its own fields, lists, email address, exports and members. With Business Central, one connection per company can sit side by side in "Integrations".

The interface in French? "Settings", "Workspace & Communication Language": the interface and automated emails switch between English and French. Video guide: "Change the language".

Where are our documents? Files and data are hosted in Canada. AI processing takes place in the United States, at Google, and the AI does not train on your documents. Scanee's security and privacy overview has the details.

Who do we contact? At the bottom of the left-hand menu, click your profile, then "Help & Support", to write to the Scanee team from the app.

Conclusion

Scanee does not change the way you run accounts payable. It removes the typing and keeps the controls: the document stays in front of the person reviewing it, coding comes from your own lists, "Completed" marks what can go, and the history keeps a record of every step.

During the trial, reproduce a real week: a project created from your ERP's template, your vendors and accounts synced, the project's address given to two or three vendors, and each invoice reviewed and exported by the person who does the data entry today. The practical guide "Automate your invoice processing in 3 steps", on scanee.ai, sums up this path on one page.

© 2026 Scanee.ai — All rights reserved.

Next step. Create your "Vendor invoices" project from your accounting software's template, then process your first ten invoices following the typical day in section 2. For an onboarding session with your team, write to us from "Help & Support" or at scanee.ai.

© 2026 Scanee.ai — All rights reserved.

SCANEE

scanee.ai

© 2026 Scanee.ai — All rights reserved.