



Konkrete eksempler på hvordan AI forbedrer AP-prosessen for Medius kunder

Medius Customer Day – Oslo 13 November 2024

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AI is a revolution for Medius AP Automation!



The Changing Role of the CFO and Finance team



From technical and fiduciary expertise with a narrow financial focus ...



... To a business partner with strategic & operational focus, leading a data driven & low-cost Finance organization

Gartner Survey priority for CFOs in 2024

Leading Transformation

Transformation and **Functional Improvement** are the Predominant Themes Running Through all the Top 10 CFO Priorities for 2024



Eight ways Medius applies AI to your process

1

Best In Class Data Extraction

- Capture uses AI and ML algorithms since 2016
- Learning from hundreds of millions of invoices and 99.7% touchless capture rate.

2

Touchless Capture

- Learning after just two invoices
- Invoices with high levels of data confidence bypass manual verification and fly through for processing

3

SmartFlow

- Auto-fills coding, tax and approver with 95% precision after two invoices
- Bringing efficiency and the industry's highest rates of straight through processing.

4

Fraud and Risk Detection

- Pattern learning intelligently identifies and surfaces potential risk and errors
- Complete oversight through Fire Station console and reporting

5

Medius Copilot

- Our AI workmate, helps approvers by delivering information about an invoice
- This enables users to make quick, confident and accurate invoice approval decisions.

6

Supplier Conversation

- Proactive insights to optimize system and improve automation rates
- Ask Agent to apply the recommended settings

7

99% Automated* e-Invoicing

- Visualization of eInvoice structures
- No dependency on supplier or operator
- Automation across variations of invoice formats.

8

Touchless Payments

- STP extends into your payments
- Trusted suppliers can be given the green light for automatic payment approval
- Free up the AP team for other tasks.

Best-in-class data extraction

The screenshot displays the AP Automation software interface. At the top, there is a navigation bar with 'HOME', 'INBOX', 'DASHBOARD', 'REPORTS', and 'CREATE' options, along with a search bar and user profile 'A'. The main content area shows a document titled 'Document 25 of 194' with a 'Back' button and 'Add/remove labels' dropdown. The document is an invoice from 'TAPEMAN' with the following details:

Invoice address: Medius AB, Klarabergsviadukten 90, 111 64 Stockholm, Sverige
Delivery address: Medius AB, Klarabergsviadukten 111 64 Stockholm, Sverige

Company: MediusFlow SWE
Supplier: Tapeman (Demo0012)

General information:
Invoice/Credit: Invoice
Invoice number: 3040118102
Order number: 123077

Dates:
Invoice date: 9/19/2023

Amounts:
Currency: EUR
VAT amount: 963.95
Total amount: 4,820.00
Rounding: 0.27

A callout box highlights the text: "High rate of first time identification, data cleaning possibilities and intelligent extraction of complex lines".

The invoice items are as follows:

Order no. / Description	Del.	Ordered	Rest		
Order no: P0522646 Your ref: MF-123077 1 TZE211 TZE211 6MM BLACK ON WHITE TAPE EAN-Number: 4977766685054	30	30	0	6,93	207,90
Order no: P0522646 Your ref: MF-123077 2 TZE221 TZE221 9MM BLACK ON WHITE TAPE EAN-Number: 4977766685085	150	150	0	7,79	1 168,50
Order no: P0522646 Your ref: MF-123077 3 TZE231 TZE231 12MM BLACK ON WHITE TAP EAN-Number: 4977766685177	150	150	0	8,62	1 293,00
Order no: P0522646 Your ref: MF-123077 4 TZE421 TZE421 9MM BLACK ON RED TAPE EAN-Number: 4977766685887	3	3	0	7,79	23,37

At the bottom, a summary table is visible:

Order number	Item number	Item description	Quantity	Amount
1 MF-123077	4977766685054	TZE211 6MM BLACK ON WHITE TAPE	30	207.90
2 MF-123077	4977766685085	TZE221 9MM BLACK ON WHITE TAPE	150	1,168.50
3 MF-123077	4977766685177	TZE231 12MM BLACK ON WHITE TAP	150	1,293.00
4 MF-123077	4977766685887	TZE421 9MM BLACK ON RED TAPE	3	23.37
5 MF-123077	4977766686655	TZE621 9MM BLACK ON YELLOW TAP	50	389.50
6 MF-122975	4977766693059	TZE721 9MM BLACK ON GREEN TAPE	3	23.37

E-invoicing made simple

ViDA and legal mandates changes the invoice landscape

AI can make e-invoices
99%* automated

Readable and editable invoice layout with learning

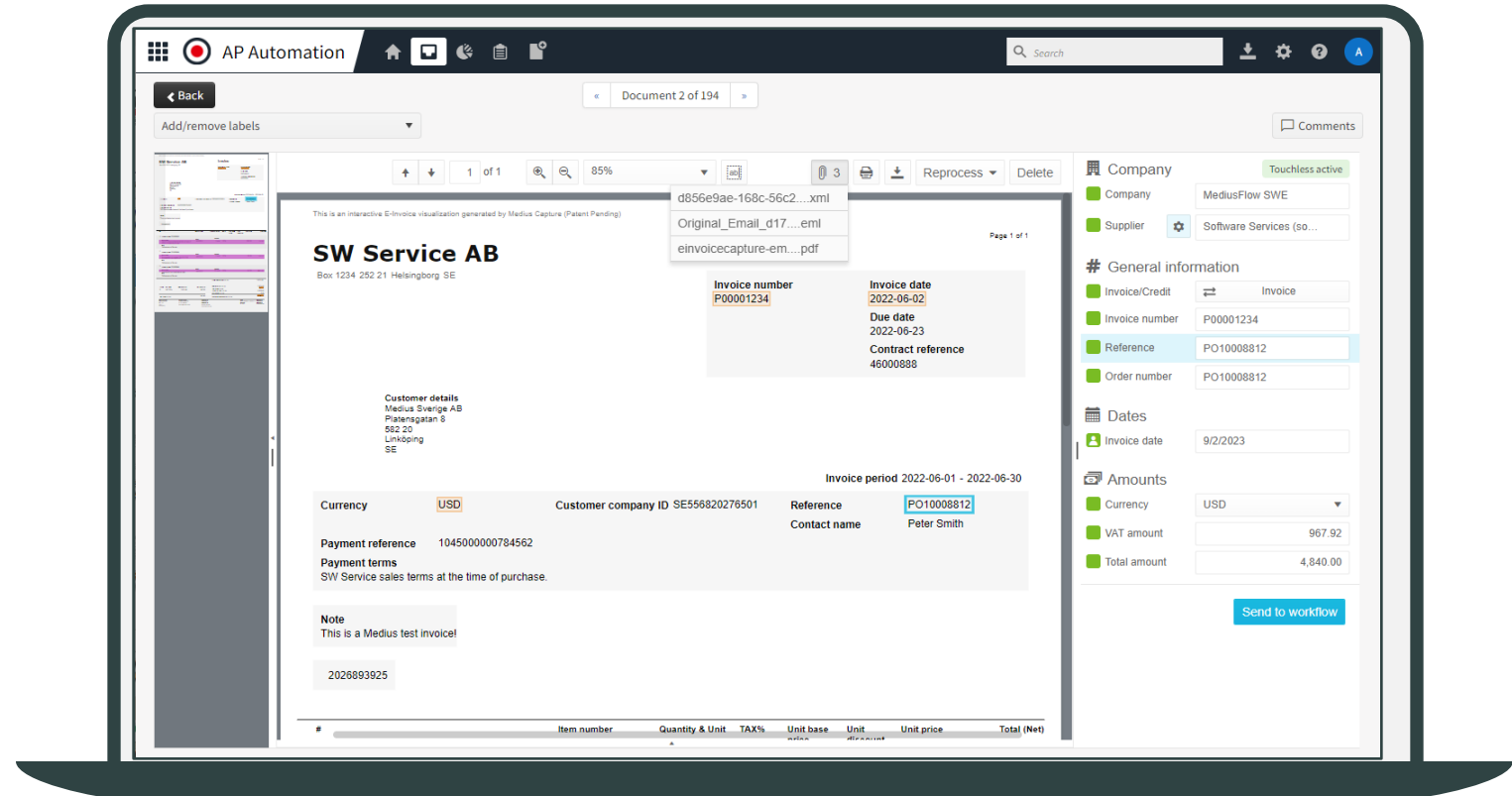
- Advanced learning of the supplier
- Learning of reference
- Re-mapping of fields

Automatic detection of different formats

Intelligent validations

- No IT involvement
- Same validations for all invoice types

You are in control



*patent pending solution

Touchless Invoice Import

Trust built by AI

No need to verify an invoice

Focus on exceptions

High confidence

Highly accurate and reliable data capture that learns after just 2 invoices allows for Touchless Capture to be widely enabled, so invoices with very high levels of data confidence simply bypass manual verification and fly through for processing, where Medius SmartFlow takes over to automatically code and distribute invoices

The screenshot displays a 'Supplier settings' window for 'Software Services'. It includes a table of 'Supplier identifiers' with fields like Supplier name, Currency code, External system identifier, Organization number, Supplier Id, Payment term, Other, and VAT registration number. Below this, there is a 'Touchless automation' section showing 'Active' status and a '10 invoices' summary for the last 60 days. A progress bar indicates 'Correct 30% (3 invoices)' and 'Touchless 30% (3 invoices)'. A 'Send to workflow' button is visible at the bottom right of the settings panel.

Supplier identifiers	
Supplier name	Supplier Id
Software Services	softwareservices
Currency code	Payment term
USD	30
External system identifier	Other
mfse;softwareservices	both e-invoices and PDF invoices
Organization number	VAT registration number
5568203987	SE556820398701

Touchless automation: Active

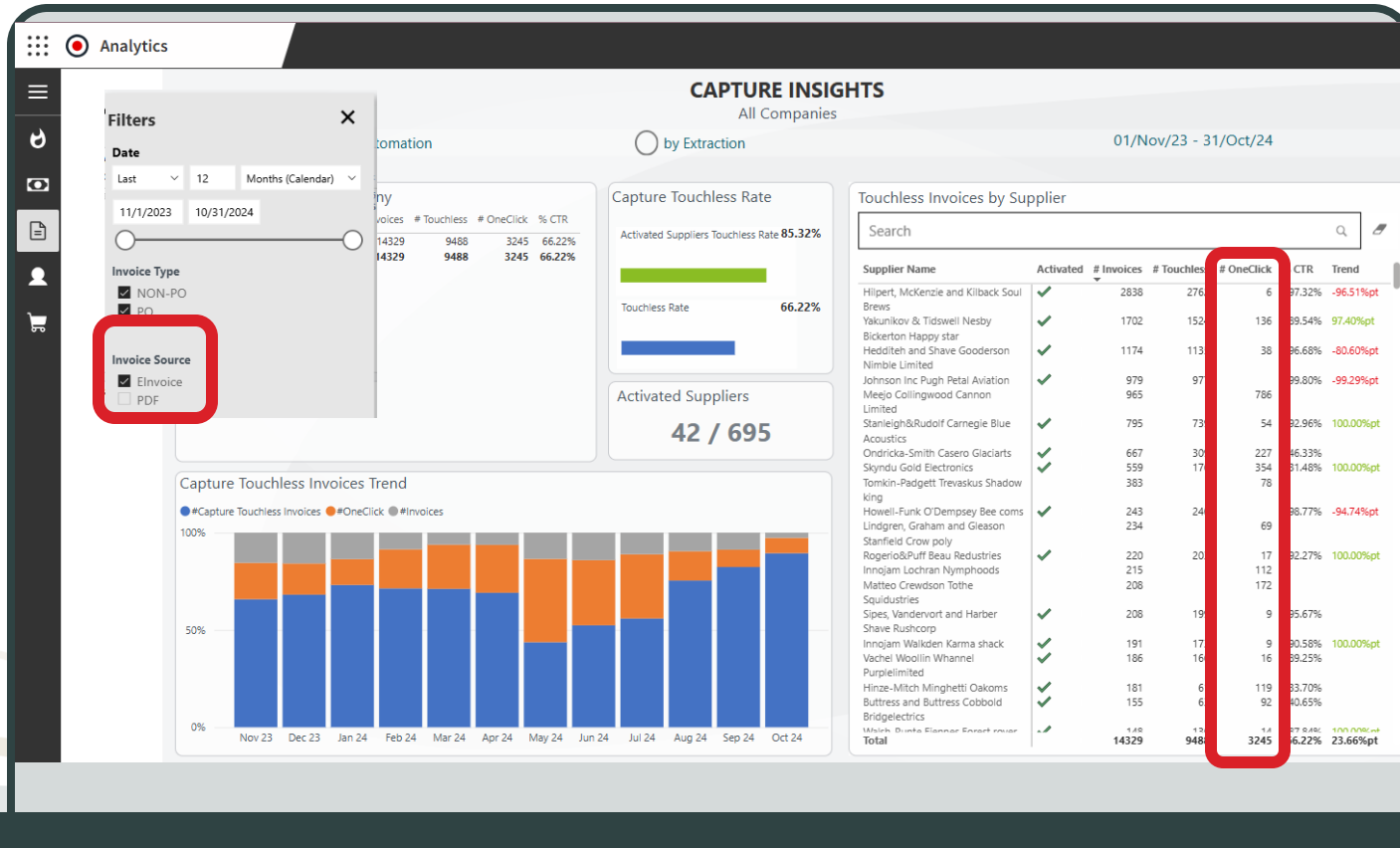
10 invoices last 60 days

Correct 30% (3 invoices)

Touchless 30% (3 invoices)

Touchless automation active. Invoices will be sent to workflow automatically when there are no validation errors. Read more on Success Portal.

Analytics – Capture insights



Tips from the Coach

- Find suppliers that have a high rate on #OneClick
- Select different invoice sources, pdf/e-invoice in the filter and start with e-invoices

The logo for KBYGG, featuring a stylized orange 'K' followed by 'BYGG' in white, all on a dark red background.

*99% Capture touchless
on their e-invoices*

“ A major advantage is that you are in control of the fields yourself. You do not need to contact your VAN operator or Supplier asking them to change. And best of all you can pick up and pare any ambiguities as soon as the invoice arrives.



Sandra Silvander, AP manager

Medius SmartFlow

World class coding and routing of Non PO invoices!

Intuitive UI - easy to track the values

The screenshot displays the AP Automation software interface. On the left, a list of invoices is shown with columns for status, company, document, supplier, invoice number, voucher number, and amount. A 'Non-PO invoice (21)' section is highlighted. The main area shows a detailed view of a 'Route - Non-PO invoice 73556/23552/23' with a total amount of 102,26 SEK. A coding table is overlaid on the invoice details, showing a list of items with their respective codes, dimensions, and net amounts. The table includes columns for 'Codes', 'Dimension 2', 'Net', 'Tax group', and 'Approver'. The items are: 1. kartona glāzes, vaki-Hestio (Net: 38,12); 2. kartona glāzes, vaki-Hestio (Net: 4,80); 3. papirs-Hestio AS (Net: 40,50); 4. plastmasas glāzes (udenim) (Net: 40,50). The interface also includes navigation buttons like 'Save', 'Send for review', 'Control Center', and 'Send'.

#	Codes	Dimension 2	Net	Tax group	Approver		
1	73580	18720090	1124	kartona glāzes, vaki-Hestio	38,12	61	Raivis Zebergs (BGSD46)
2	73580	18720090	ProfitC	kartona glāzes, vaki-Hestio	4,80	00	Raivis Zebergs (BGSD46)
3	68010	18720090	36236	papirs-Hestio AS	40,50	63	Raivis Zebergs (BGSD46)
4	68010	18720090	ProfitC	plastmasas glāzes (udenim)	40,50	63	Raivis Zebergs (BGSD46)

Invoice content + coding history

SmartFlow utilizes **invoice content** to learn and suggest coding on an invoice.

While coding history remains significant, SmartFlow comprehends the correlation between elements of invoice coding and invoice content, thereby adapting proposals accordingly.

AP Automation | Home | Inbox | Dashboard | Reports | Create | Search

Document 11 of 35

Approve - Non-PO Invoice 7010899Demo1

Supplier: Lite n' Easy Perth Pty Ltd | Net amount: 100.48 AUD | Invoice date: 15/07/2023 | Invoice no: 7010899 | Company: Trans Opt AU63 | Tax: 30.00 AUD | Due date: 15/08/2023 | Payment ref: 7010899

This document was put on hold by claire - AP Officer. Sending it to the next step will resume the workflow and remove the document's on hold status.

Coding | Invoice details | Comments | File Attachments | History | Links

We have applied a coding suggestion that will be applied to the invoice. You can just undo and apply your own.

Coded net: 100.48 Coded tax: 30.00 Coded total: 130.48

Code listing: 1 | 01 | 1200 | 62923 | 10121129 | 100.48 | claire - AP Officer (claire) | Approve/Reject

Showing 1 to 1 of 1 lines, 0 Selected

1 comments

claire - AP Officer (claire) | 22 March 2024 08:39

RAYMOND Tsilington | 988947 | unit: | rick st | Belmont | WA: | 04

Item Description	Qty	Item Price	Price (inc GST)
5 My Choice Desserts	1	19.95	19.95
Dinners (10)	1	120.95	120.95
Delivery	1	4.95	4.95
Administration fee	1	6.95	6.95

Total Value: 152.80
Credit applied as paid by Customer: -42.27

AP Automation | Home | Inbox | Dashboard | Reports | Create | Search

Document 39 of 35

Approve - Non-PO Invoice 7012065Demo2

Supplier: Lite n' Easy Perth Pty Ltd | Net amount: 141.42 AUD | Invoice date: 28/07/2023 | Invoice no: 7012065 | Company: Trans Opt AU63 | Tax: 14.14 AUD | Due date: 27/08/2023 | Payment ref: 7012065

This document was put on hold by claire - AP Officer. Sending it to the next step will resume the workflow and remove the document's on hold status.

Coding | Invoice details | Comments | File Attachments | History | Links

We have applied a coding suggestion that will be applied to the invoice. You can just undo and apply your own.

Coded net: 141.42 Coded tax: 14.14 Coded total: 155.56

Code listing: 1 | 01 | 1200 | 62923 | 10123292 | 141.42 | claire - AP Officer (claire) | Approve/Reject

Showing 1 to 1 of 1 lines, 0 Selected

1 comments

claire - AP Officer (claire) | 22 March 2024 08:39

Ron CLARK | 1270913 | 4E | | | Rockingham | WA: | 04

Item Description	Qty	Item Price	Price (inc GST)
5 My Choice Desserts	2	19.95	39.90
Dinners (5)	1	74.95	74.95
7 My Choice Dinners	1	88.95	88.95
Delivery	1	4.95	4.95
Administration fee	1	7.95	7.95

Total Value: 216.70
Credit applied as paid by Customer: -41.14

SmartFlow – Merge configuration and AI

Tips from the Coach

- Best from both worlds, or a smooth way to adopt SmartFlow
- With newly released merge-functionality you can utilize both rules and configuration with AI
- Accounting templates with fixed values like Account + SmartFlow AI value for Cost center found from values on the invoice



New ESG reporting legislation
demands real data – not estimates.

Stay compliant and accurate with detailed insights
from your invoices!



We need to report ...

But on what?

Medius Capture AI-algorithms makes it easy to extract everything!

- Legal requirements for ESG (CSRD) reporting requires higher need to fetch data from the supplier invoices, such as quantity of fuel etc
- Spend analyze on a detailed level from invoice lines, not only by the coding history



Traditional scanning solutions fetches data only for supporting the financial follow up for coding, VAT, distribution, accruals etc.



With a modern tool like Medius, you can gather data for various needs without making the coding and authorization process more complex!

Fetching line level data...

AP Automation

Home | Inbox | Dashboard | Reports | Create

Search

Reports / Create

Fields

descr

▼ Capture

▼ Invoice

▼ Invoice Line

Item Description

▼ Supplier

Report Name: Invoice lines ESG report

Date field: Invoice: Invoice Date | Range: All time

+ Add filter

Preview of report with 10 entries.

Run report | Save

Drag a column header and drop it here to group by that column

Invoice: Supplier	Invoice: Number	Item Number	Item Description	Amount	Quantity
ECO Gas	5129871	13210	Gasol Propan PK10 10 kg	3,379.43	17.00
ECO Gas	5129871		ADR per cylinder	340.00	17.00
ECO Gas	5129871	23210	Empty bottle PK10	0.00	9.00
ECO Gas	5129871	23205	Empty bottle PK5	0.00	2.00
ECO Gas	5129871	223205	Bottle PK5	1,088.00	2.00
ECO Gas	5129871	223210	Bottle PK10	5,448.00	8.00
ECO Gas	5129871		Rounding	-0.29	1.00
SW Service AB	P00001234	10005011	OFFICE 365 ENTERPRISE E5 WITHOUT PSTN CON...	350.00	1.00
SW Service AB	P00001234	10005024	This addition is prorated.:SKYPE FOR BUSINESS ...	118.68	3.00
SW Service AB	P00001234	10005032	SKYPE-PSTN-CONFERENCING	3,403.00	83.00
				Total Sum:	Total Sum:

...no interference with the coding process

The screenshot displays the AP Automation software interface. The top navigation bar includes 'Home', 'Inbox', 'Dashboard', 'Reports', and 'Create'. A search bar is located on the right. The main content area is divided into two panels. The left panel shows a list of 'Non-PO invoice (17)' and 'PO invoice (10)'. The right panel displays details for 'Route - Non-PO invoice 56873581MS', including supplier information (FNB Sverige, MediusFlow SWE), net amount (7,636.75 SEK), tax (1,909.25 SEK), invoice date (10/1/2021), and due date (10/31/2021). A coding suggestion is shown: 'We have applied a coding suggestion that we believe is the one you want. If it is not correct just undo and apply your own.' Below this, a summary shows 'Coded net: 260.65 Coded tax: 0.00 Coded total: 260.65 Coding balance (total): 0.00'. A table of code strings is visible, with columns for '#', 'Code string', 'Net', and 'Approver'. The table contains one row with code string '6450 010 CC Proj Desc' and net amount '260.65', approved by 'Max Standbridge (max)'. At the bottom, there are buttons for 'Save', 'On hold', 'Send for review', 'Control Center', 'Invalidate', and 'Route'.

AP Automation

Home Inbox Dashboard Reports Create

Search

Filter Search

Bulk operation

Showing 1 out of 1 Show 10 more

Non-PO invoice (17)

Labels	Indicators	Task	Company
Sugg...		Route	Acme Ltd
Sugg...		Route	Acme Inc.
+		Route	MediusFlow SWE
+	%	Route	MediusFlow SWE
+		Post control	Acme Inc.
+	%	Post control	Acme Inc.
+	%	Route	Acme Ltd
+		Route	Acme Ltd
+		Route	Acme Ltd
+		Route	Acme Inc.
+		Route	Acme Inc.
+		Route	Acme Inc.
+	%	Route	Acme Inc.
+		Route	Acme Inc.
Sugg...		Route	MediusFlow SWE
+		Route	MediusFlow SWE
+		Route	MediusFlow SWE
+	%	Route	MediusFlow SWE
+		Route	MediusFlow FR

Showing 17 out of 17 Show 10 more

PO invoice (10)

Labels	Indicators	Task
+		Connect

Route - Non-PO invoice 56873581MS

Supplier: FNB Sverige, Company: MediusFlow SWE, Net amount: 7,636.75 SEK, Tax: 1,909.25 SEK, Invoice date: 10/1/2021, Due date: 10/31/2021, Invoice no: 56873581MS, Payment ref: #

Coding Invoice image Invoice details Comments File Attachments 1 History Links 2

+ Add Clone Remove Apply latest coding Templates Filters More Retrieve approver

We have applied a coding suggestion that we believe is the one you want. If it is not correct just undo and apply your own. Undo

Coded net: 260.65 Coded tax: 0.00 Coded total: 260.65 Coding balance (total): 0.00

#	Code string	Net	Approver
1	6450 010 CC Proj Desc	260.65	Max Standbridge (max)

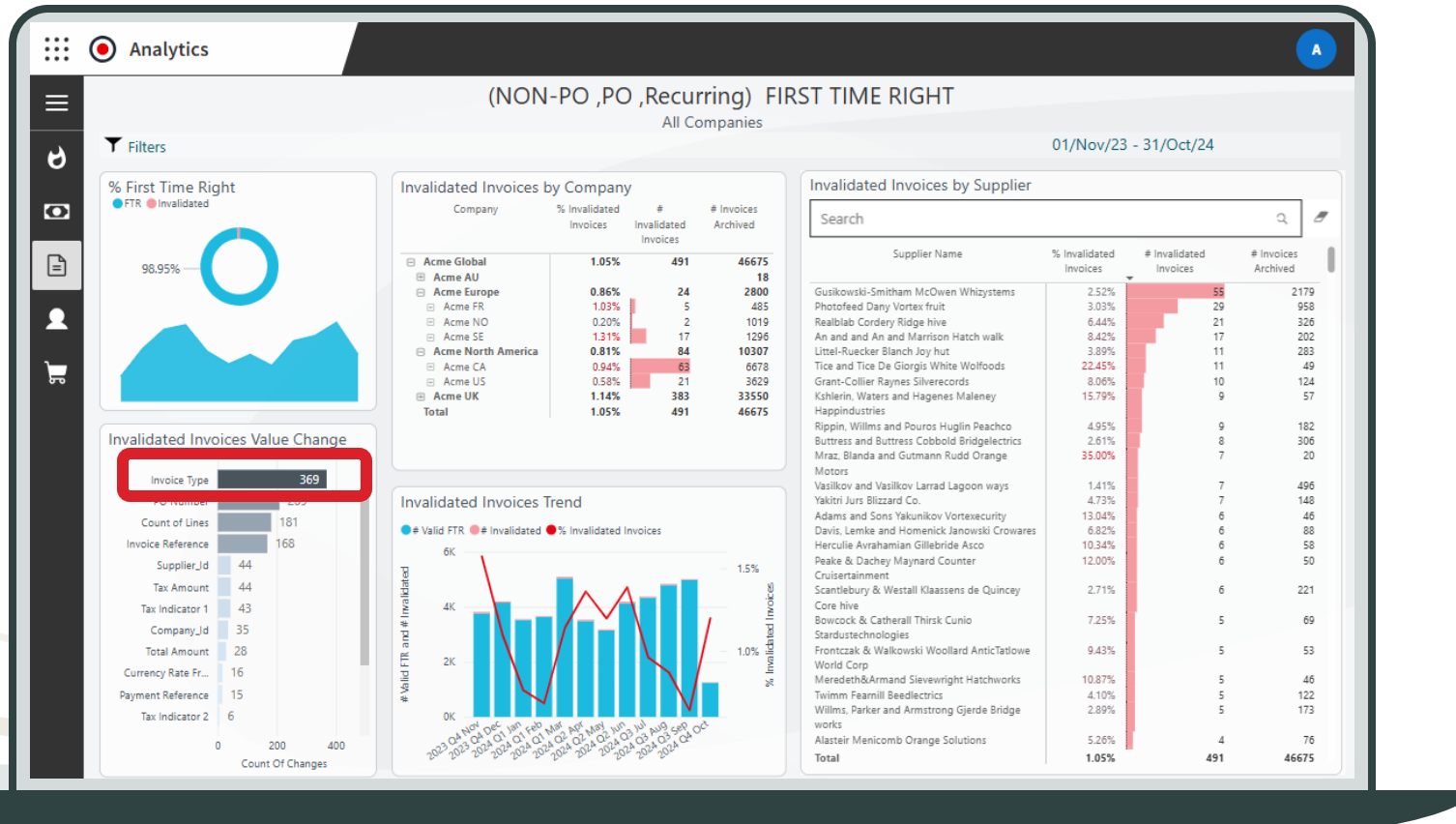
0 comments

Write a comment (use @name to mention a user)

Save Comment

Save On hold Send for review Control Center Invalidate Route

Analytics – First Time Right



Tips from the Coach

- Keep track on your “Re-classifications” and try to solve the source, if e-invoices causes most problem, move them into Capture
- Make sure you keep the invoice lines when importing Non-PO. Makes the Re-classification to a PO-invoice much easier

Be compliant and streamline Your Supplier Onboarding

Simplify the Process and Boost Security!

Capture initiated Supplier onboarding

The screenshot displays the AP Automation interface. At the top, there is a navigation bar with 'Home', 'Inbox', 'Dashboard', 'Reports', and 'Create' buttons. A search bar is located on the right. The main content area shows a document titled 'Document 6 of 40' with a 'Back' button and 'Add/remove labels' dropdown. The document content includes the 'BLUE STEEL' logo and contact information for Blue Steel Manufacturing. A 'PURCHASE ORDER' section is partially visible. A 'Supplier onboarding' form is overlaid on the document, containing fields for supplier details and a 'Request a new supplier' button highlighted in yellow. A callout box points to this button with the text: 'Kick off the onboarding process from the invoice, if the supplier is not recognized.' The form also includes a 'Send to workflow' button at the bottom right.

AP Automation | Home | Inbox | Dashboard | Reports | Create | Search

Document 6 of 40

Back | Add/remove labels

BLUE STEEL

Blue Steel Manufacturing
1 Blue Steel Way
Fort Worth, TX 76031
Tel: +1 817 786 1212

PURCHASE ORDER

SHIP TO:
Acme Plant #15
Reading, PA 19611

TO:
Acme Industries
P.O. Box 900
New York, NY 10017
USA

COMMENTS OR SPECIAL INSTRUCTIONS:

PO	ITEM	QTY	DESCRIPTION
MF-3283	2300010803	4	STRAP TENSIONER
MF-3283	2300011218	2	NUT, LOCK. LOW PROFILE 5/8-11 UNC

Supplier onboarding form:

Company: Acme Inc.

Supplier: Request a new supplier

General information:

- Invoice/Credit: Invoice
- Invoice number: 40957021
- Reference:
- Order number: 3283

Dates:

- Invoice date: 1/19/2023

Amounts:

- Currency: USD
- VAT amount: 0.00
- Total amount: 6,013.09

Buttons: Cancel, Submit, Send to workflow

Callout: Kick off the onboarding process from the invoice, if the supplier is not recognized.

Supplier onboarding requests

On submission, authorized users can review and approve supplier responses in Supplier Onboarding

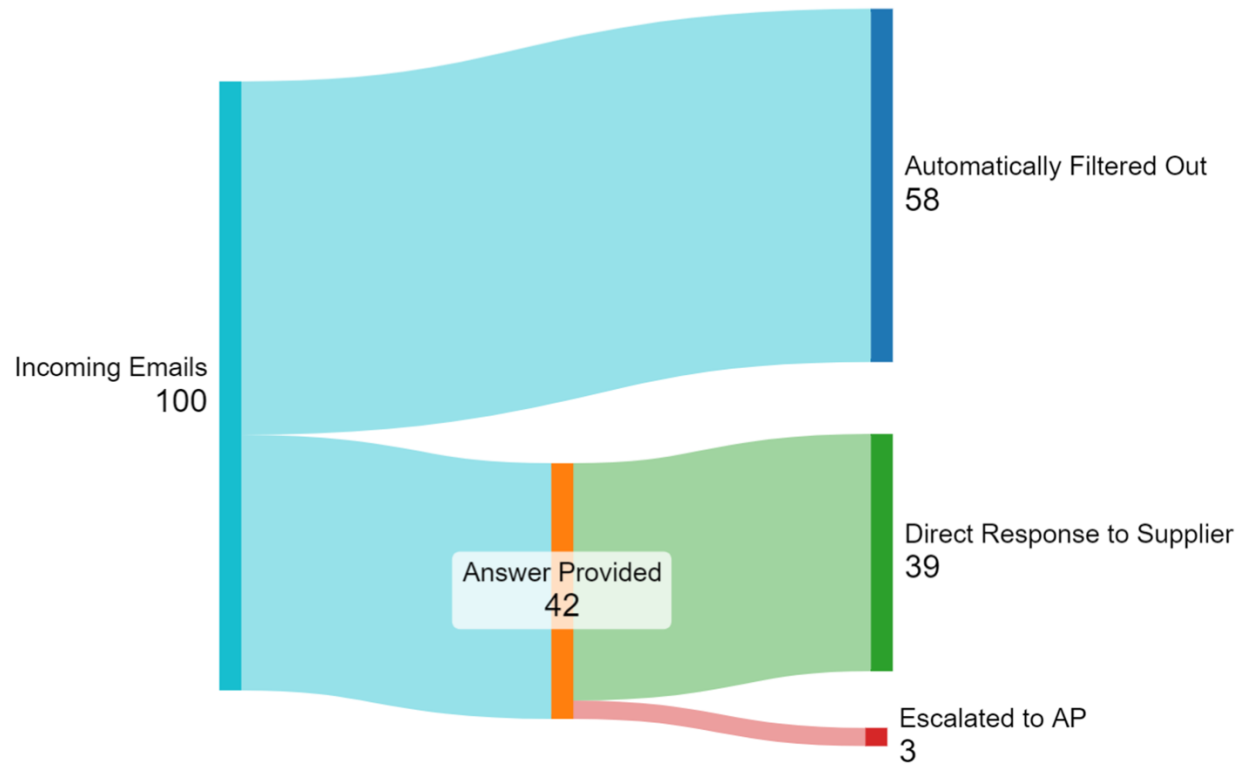
The screenshot displays a web application interface for 'Supplier Onboarding'. The main heading is 'Manage Responses'. There is a 'Filter' button and a '+ Onboard New Supplier' link. The table below lists various suppliers with their onboarding progress and status.

Supplier Name ↑	Supplier Status	Progress	Accessed	Responded	Stage	Current Approvers
Bunzl Cleaning & Hygiene Supplies	1 On Hold	N/A			N/A	N/A
Medius Group	3 Approved	82%	✓	✓	N/A	N/A
Peterson Packaging	1 Approved	100%	✓	✓	N/A	N/A
Phoenix Supplies	1 Approved	100%	✓	✓	N/A	N/A
Prasits Rice Inc.	New	100%	✓	✓	N/A	N/A
The Rice Man Inc.	2 Approved - Awaiting Review	100%	✓	✓	2 of 2	Administrator Leonard Greenberg +1
UK Fast Ltd.	1 New	53%	✓	✓	N/A	N/A

Speaking about suppliers...

Are you tired of answering the same questions?
Imagine if they could find the answers themselves—
saving you time and hassle!

Medius Supplier Conversation



AP teams get a lot of spam!

SC is very good at answering

So AP can save a lot of time

First line conversational support

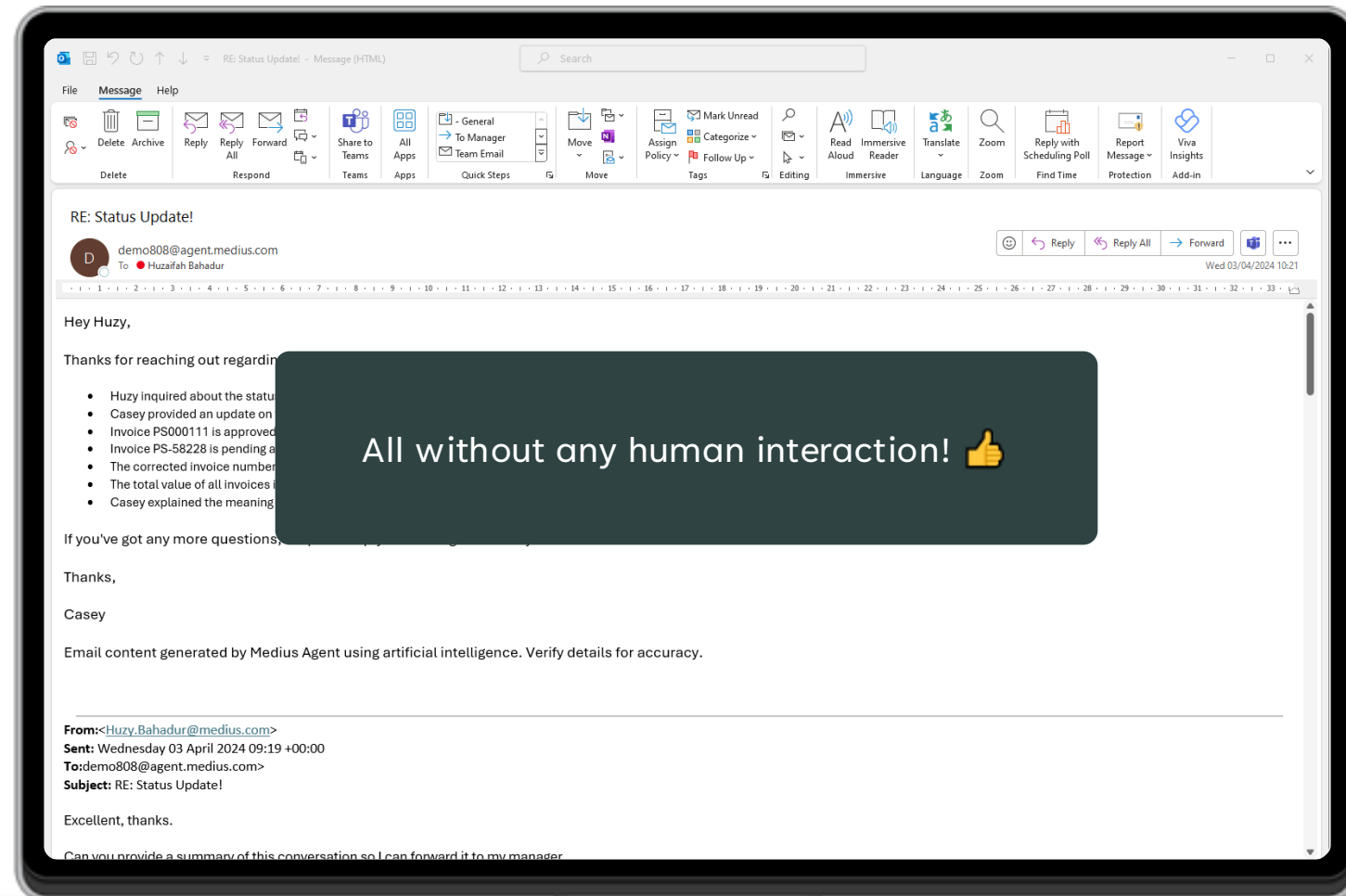
- Time and cost savings for supplier enquiries
 - Clear and consistent responses
- Security – check the provenance of enquiries
 - Is the sender of the email connected to the supplier or a scam?
- Data insights
 - Allows you to analyze what your suppliers want to know



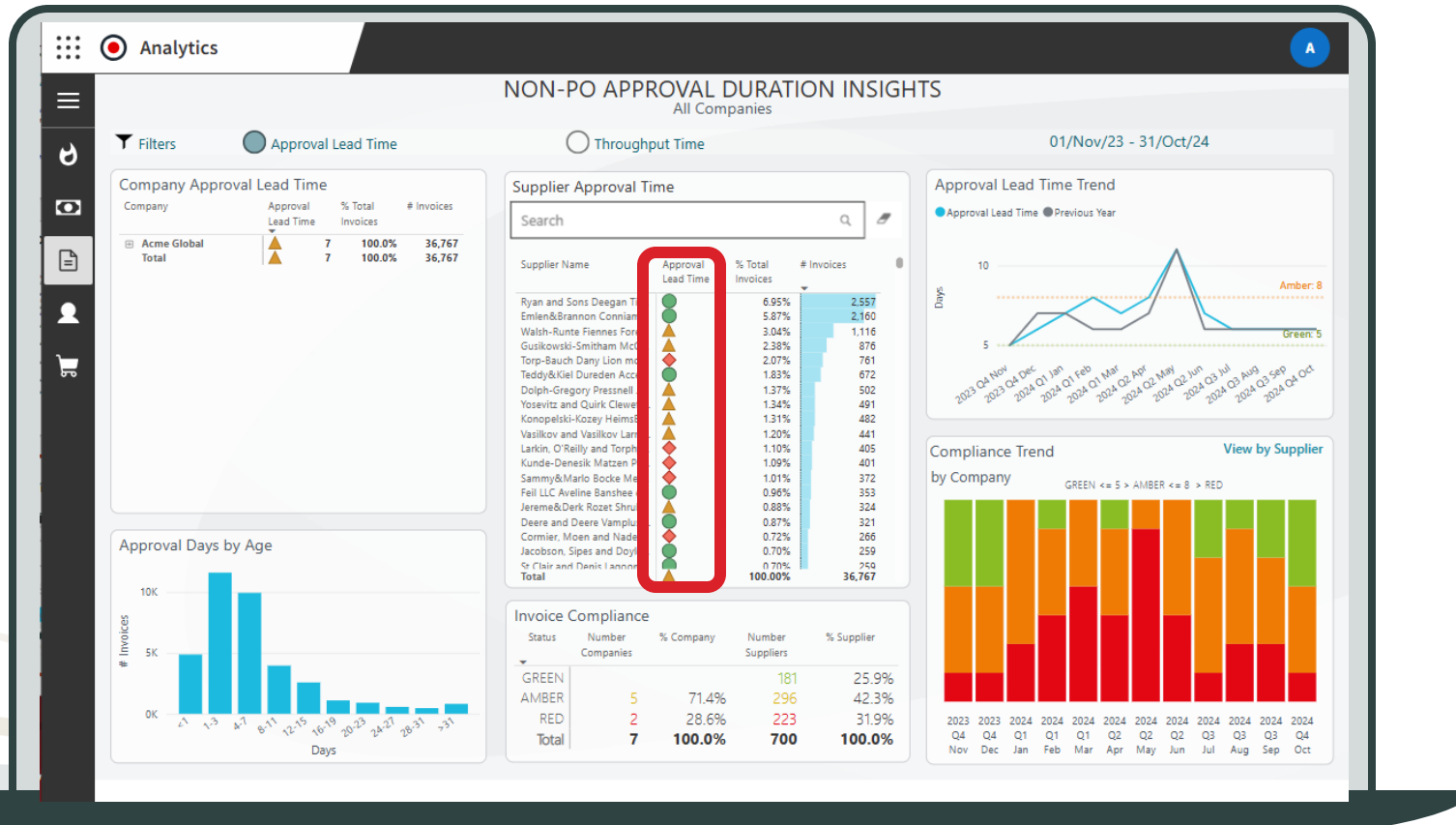
Supplier Conversation

- Supplier asks for an update on 3 invoices
 - 1 invoice number is incorrect
- A response is provided for 2 invoices
 - Asks for 3rd invoice number to be corrected
 - Email contains the total amount and additional details on each invoice
- Supplier corrects the 3rd invoice number and asks for a further update
- A response is received with the update for the corrected invoice number
- Supplier asks for a more detailed explanation about the invoice statuses
- The definitions / clarification is provided.
- Supplier asks for a summary of the conversation
- A final summary is provided.

demo808@agent.medius.com



Analytics – Process duration insights



Tips from the Coach

- Look at the suppliers with long lead times for approval and review why they take extra time
- If there are a lot of questions from these suppliers, maybe Supplier Conversation can help reducing the number of questions and lead time for handling them

Fraud & Risk Prevention

As we embrace more automation, our need for control grows stronger.

The threats may be getting smarter, but so are we—ready to stay ahead and protect what matters most!

Proactively catch fraud

Gain visibility and control across the invoice to pay lifecycle

Relax and let machine learning and AI controls enforce your policies consistently

Gain visibility into your fraud and risk exposure with new insights

Start catching fraud today with a solution built into Medius

The screenshot displays a web interface for invoice management. The main area shows a Swedish invoice (Faktura) with the following details:

- Fakturadatum:** 2024-03-31
- Order nr:** 14665413
- Faktura nr:** 10255603
- Kund nr:** 186251
- Fakturaadress:** Medius Sverige AB, Klarabergsviadukten 90, 111 64 Stockholm, Sverige
- Er referens:** 1704
- Godsmärke:** IT-staben
- Ert inköpsnummer:** 4571224509
- Vår referens:** DACSA WEBSYSTEM-4

Below the invoice details is a table with the following data:

Antal	Rest	Pris	Moms%	Moms	Radtotal
2	0	516,87	25,00	258,44	1 033,74
2	0	7 499,00	25,00	3 749,50	14 998,00
8	0	33,58	25,00	67,16	268,64
8	0	30,00	25,00	60,00	240,00
		0,00	25,00	0,00	0,00

The right sidebar contains a 'Risks' section with the following information:

- Why is this important?** Success portal
- Active risks**
- New banking information:** The bank account(s) on this invoice has not been used before.
- Duplicate invoice:** This invoice has been detected as a duplicate of an already existing document: [10255603](#)

The bottom right sidebar shows 'Company' information (BZ Test2-QA), 'Supplier' (Barista Online AB), and 'General information' including Invoice number (10255603), IBAN (SE5780000890119247645576), Invoice date (3/31/2024), Due date (4/30/2024), VAT amount (4,247.35), and Total amount (21,237.00). A 'Send to workflow' button is located at the bottom right.

Improved anomaly detection – Risk factors across suite

Cross company duplicate check

- Safeguard against duplicate payments

Sender's email change

- Identify supplier spoofing

First invoice from supplier

- Extra attention to transactions for new supplier records

Bank account details validation

- Highlight when bank details on invoice mismatch with supplier record

Organization number change and validation

- Ensure payment to correct supplier

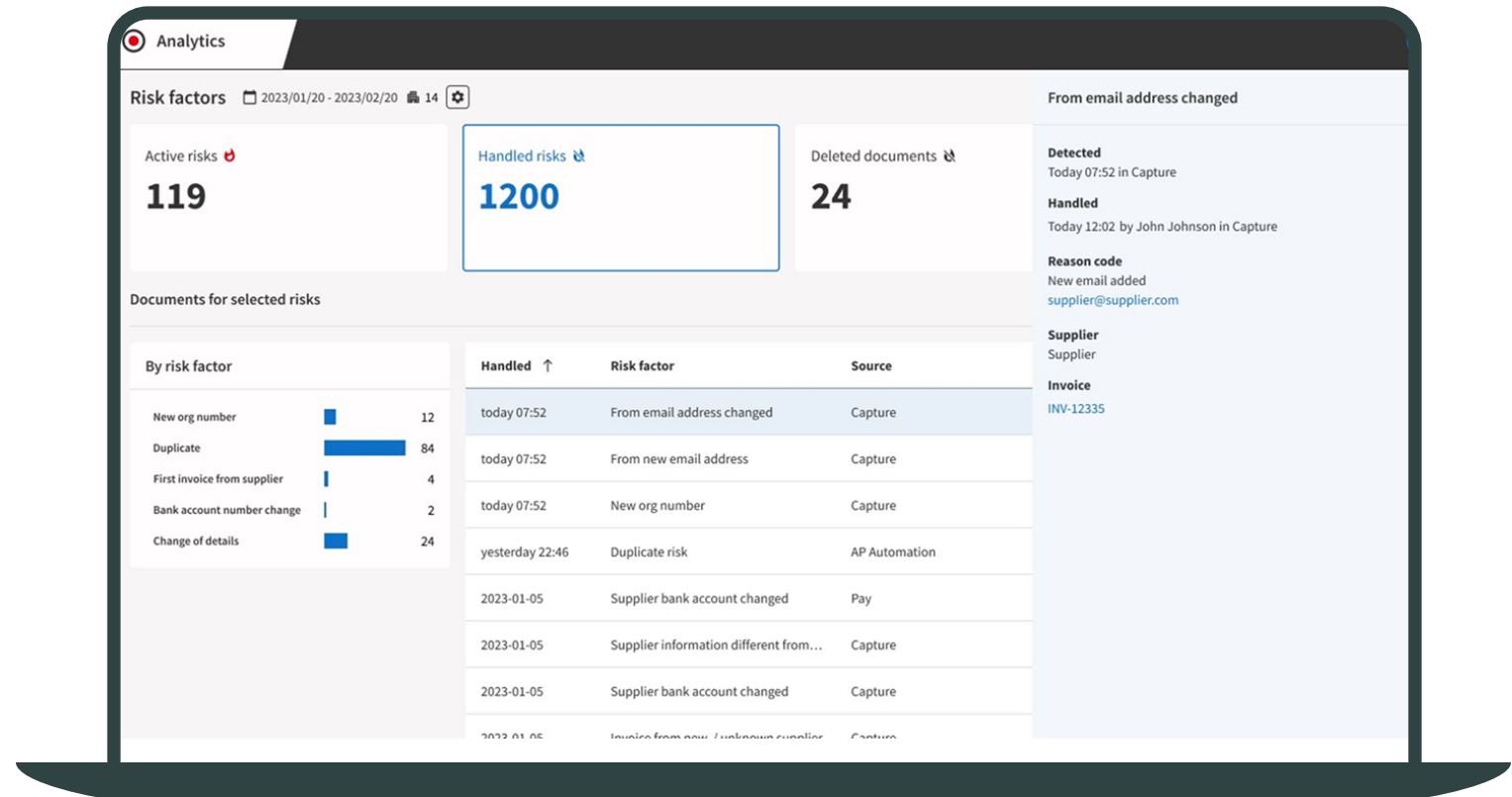
Randomized extra approval

- Extra randomized control of invoice

Fraud & Risk Detection Dashboard in Analytics

De-risk your spend

Gain visibility and control across the procure to pay lifecycle.



The background is a solid red color with several overlapping, semi-transparent dark red ovals of varying sizes and orientations, creating a layered, abstract effect.

Improve with us!

Identify and realize potential with Medius
Services!

The Medius Service

INCLUDED FOR ALL



Account Mgmt

Strategic Relations

Responsible for your relationship with Medius

Strategic Planning
Medius Facilitator
Customer Satisfaction
Subscription Mgmt



Customer Success

Business Value

Self-service guidance to assist value realisation

Process KPIs & Benchmarks
Self-service tools and Webinars
Optimisation guidance



Product Support

Incidents & Problems
Resolution/Escalation
SLA's

Coordinate:

Service Requests
Change Requests

Platinum

Gold

Standard

EXTENDED SERVICES

ELEVATE Program



Business Advantage
Your Medius Personal Trainer

Optimise:

- ✓ Access to A **named** Elevate Senior Advisor and pool of experts
- ✓ Optimisation plan & targets
- ✓ Annual health check report & performance workshops
- ✓ Monthly reports with detailed KPIs & trends
- ✓ Proactive performance monitoring
- ✓ Product release guidance
- ✓ PS Services included

Advise:

- ✓ Access to a pool of Elevate Advisors
- ✓ Monthly reports with KPIs & trends
- ✓ Annual health checks
- ✓ Product release guidance
- ✓ PS Services included

Customer Success Business Review

Customized recommendations to improve process KPIs and your business outcomes

Comparison to Customer Community Benchmarks

Insights on Medius Business News...

...and Spend Management Thought Leadership

Dear CUSTOMER NAME

It was a pleasure talking to you yesterday - thank you for taking the time to provide feedback and explain your processes.

As we had Medius EVP Product Management join the meeting to present our roadmap I suggest you book a meeting already now in September to follow-up on the recommendations.

All the recommendations you find below are linked to our [Medius Success Portal](#). I recommend you bookmark it. In the portal you find FAQs, user guides and [videos](#) as well as [release notes](#) to track on all enhancements in the product. Please consider participating our pilot regarding ["Improved Automatic Coding"](#), more details are included in the presentation, you can reach the contact person. This pilot is "risk free" from your end. The first step would just be granting access to launch and collect data in the backend and 2-3 month later when the results are available you can decide if you like it available in your Production Environment or not.

You can analyse process performance using our [dashboards](#) and reports inside of Medius. For example [reports for month end closing](#) and [gadgets available to build dashboards](#). [Medius Analytics](#) is a complementary module which provides a more intuitive user interface.

Automation analysis and recommendations

All the tips below are things you can implement self-sufficiently, but we always recommend to book a Tuning Session with our PS organization if you are unsure of how to implement them.

Expense invoices: [How to analyze and improve Automatic Distribution](#)

As AP code and route the invoice, I recommend that you consider working with [in Post Control](#), in this way you can decide to only look at the invoices you need to, for example where the coding changed, somebody made a comment, invoices over or under a certain amount etc.

As a second step you can improve automatic routing adding more [accounting rules](#) to the level and fetching the first authorizer from a [routing table](#). Another option is to use [Accounting Responsible](#). In order to make this work you need to deactivate the rule "Standard Routing" and use [differentiated routing rules](#).

PO invoices: [How to analyze and improve Touchless ratio](#)

65% touchless which is in line with Medius Average, however, the PO Total invoice processing cycle time is longer than Medius average driven by the need to connect invoices to suppliers manually connected. I recommend adding [exception types](#) and tolerances on supplier level to improve [Touchless Capture](#).

Capture: Recommend that you activate [Touchless Capture](#) - your data is captured that ~53% of the invoices, are sent to the workflow with "one click" and you need support from PS to implement these changes.

CSM NAME

News and Press Releases

NEWS MEDIA RESOURCES BLOG ABOUT MEDIUS

FEATURED NEWS


Medius "Agent", the first AI workmate for the AP industry, will be released in early 2024.

As part of our continued drive to be leaders in the industry, the workmate - currently codenamed Medius "Agent" - will help people who approve invoices by delivering useful information such as the invoice's approval path, discounting opportunities and links to the last five invoices from the vendor.

Our research has shown that one in five finance professionals (19%) feel their job is dominated by monotonous, boring, demotivating tasks with a quarter (24%) saying employees are on the brink of leaving as teams are too busy.

Medius "Agent" will help to alleviate these issues, giving teams the opportunity to focus on work that enhances the vendor experience.

[LEARN MORE ABOUT MEDIUS "AGENT"](#)



medius COMPANY X

Business Outcomes

PO Performance at a glance

KPI	YOUR AVERAGE	MEDIUS AVERAGE	BEST-IN-CLASS
Touchless processing rate	80.6%	63.8%	94.9%
Automatic post control	90.7%		
PO Total invoice processing cycle time	6.7 days	6.3 days	1.0 day



Legend: Touchless (green), Manual Connect & no manually Analyzed deviations (orange), Automatic Connect, manually Analyzed deviations (red), Manual Connect & manually Analyzed deviations (purple), Other manual tasks (black)

*Automatic Connect, no manually Analyzed deviations ** eg. manual approval of deviations/amounts, integration errors

Medius Elevate

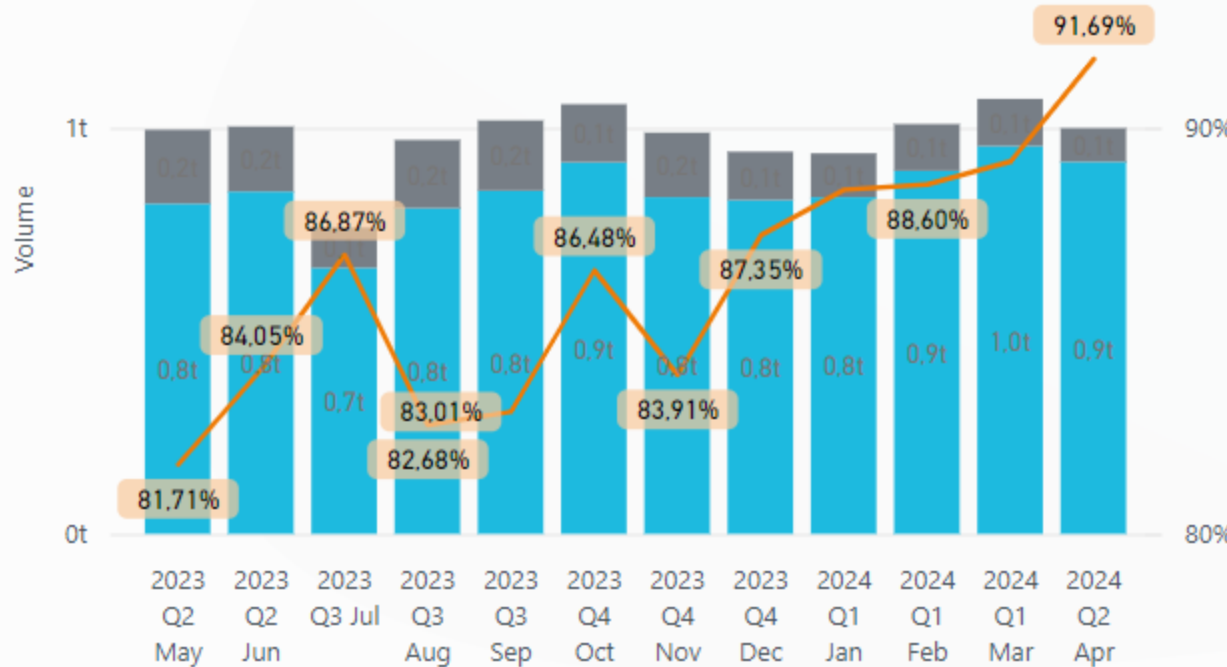
If you make continuous improvements a priority, and if you want to maximize your efficiency, Medius Elevate is designed to help you reach your organization's goals.

- We partner with you to **optimize best practices** to the fullest extent
- **Proactively** help you improve and show you how to get there
- When **new features** are introduced, we support you on how best to utilize them
- We talk through **workflow changes** to make sure they are the best decision for your company
- Conduct **health checks** to make sure you're running at your fullest capability
- Elevate is your skilled, **extended Medius arm**

Partnership that works

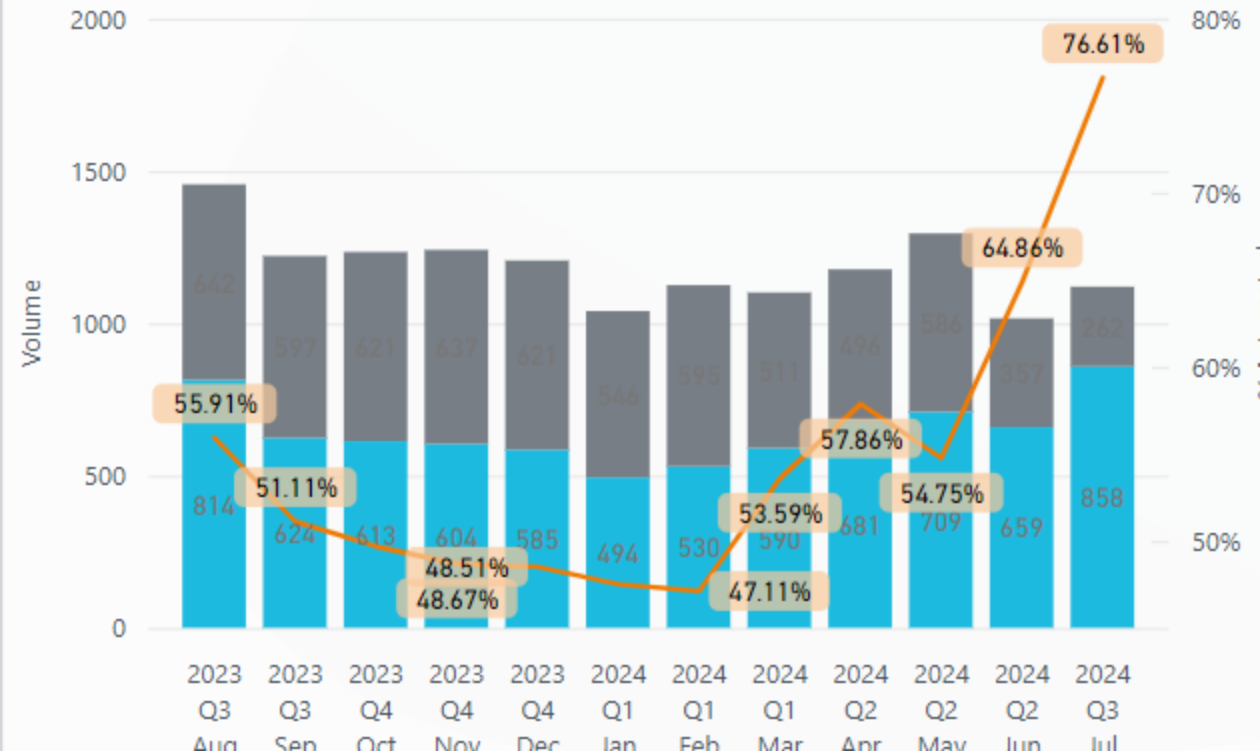
Touchless Invoices Trend

● # Automated ● #Manual ● % Automated



Touchless Invoices Trend

● # Automated ● #Manual ● % Automated





Our vision:

You are in control..

**... WITH
SUPERPOWERS**

Thank you.

