



Medius Top Tips #2

Carl Erik Finnstrøm, Customer Success Manager EMEA



**HIDDEN
FEATURE**

**HIDDEN
FEATURE**

HIDDEN / 0123456789

HIDDEN / 0123456789

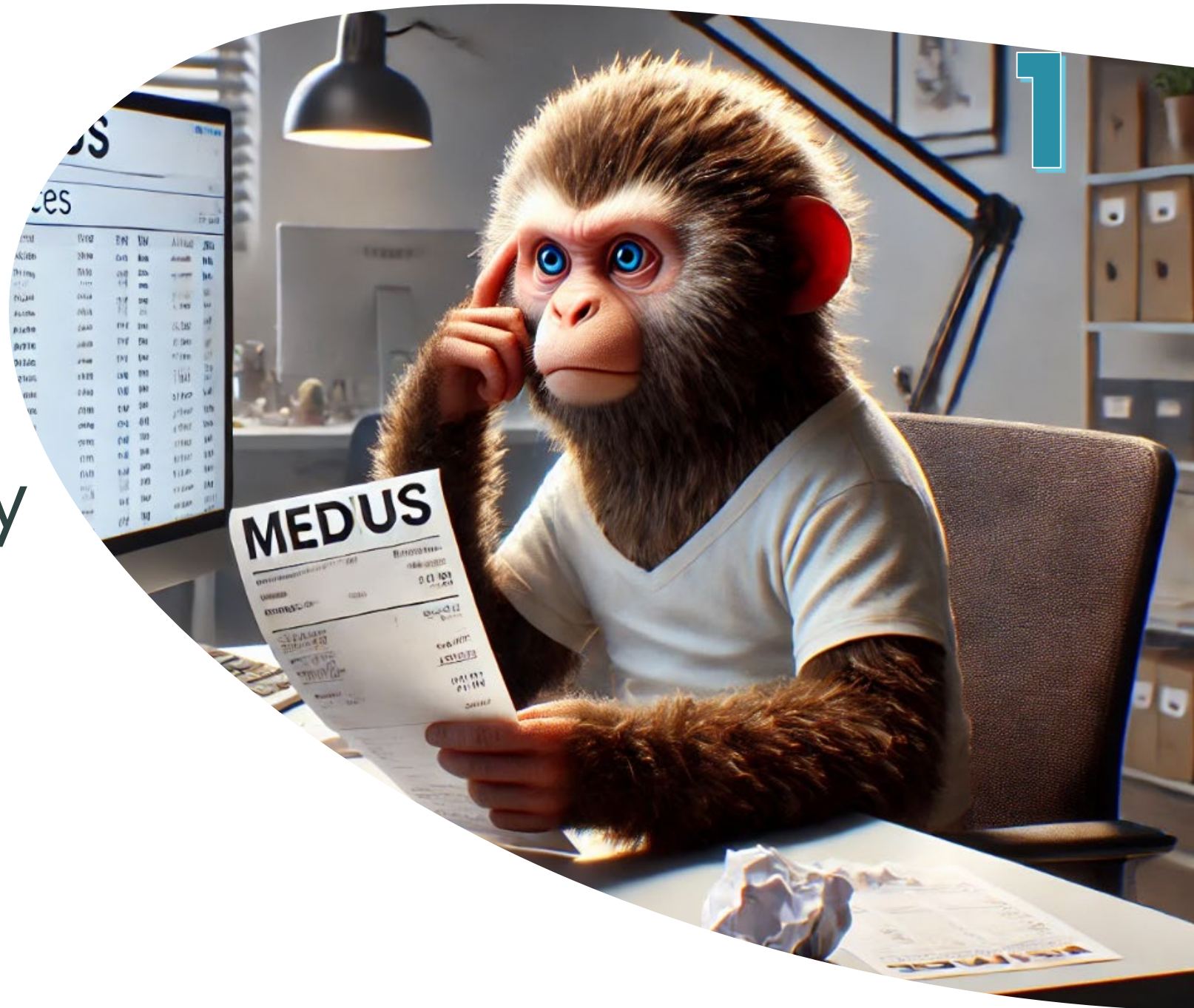
**FIDDEN
HIDDEN**



SOME THINGS ARE HARD TO FIND

10 features you might not know about!

«Why is this freight charge not automatically connecting?»



Optimal use of additional charges



Document type

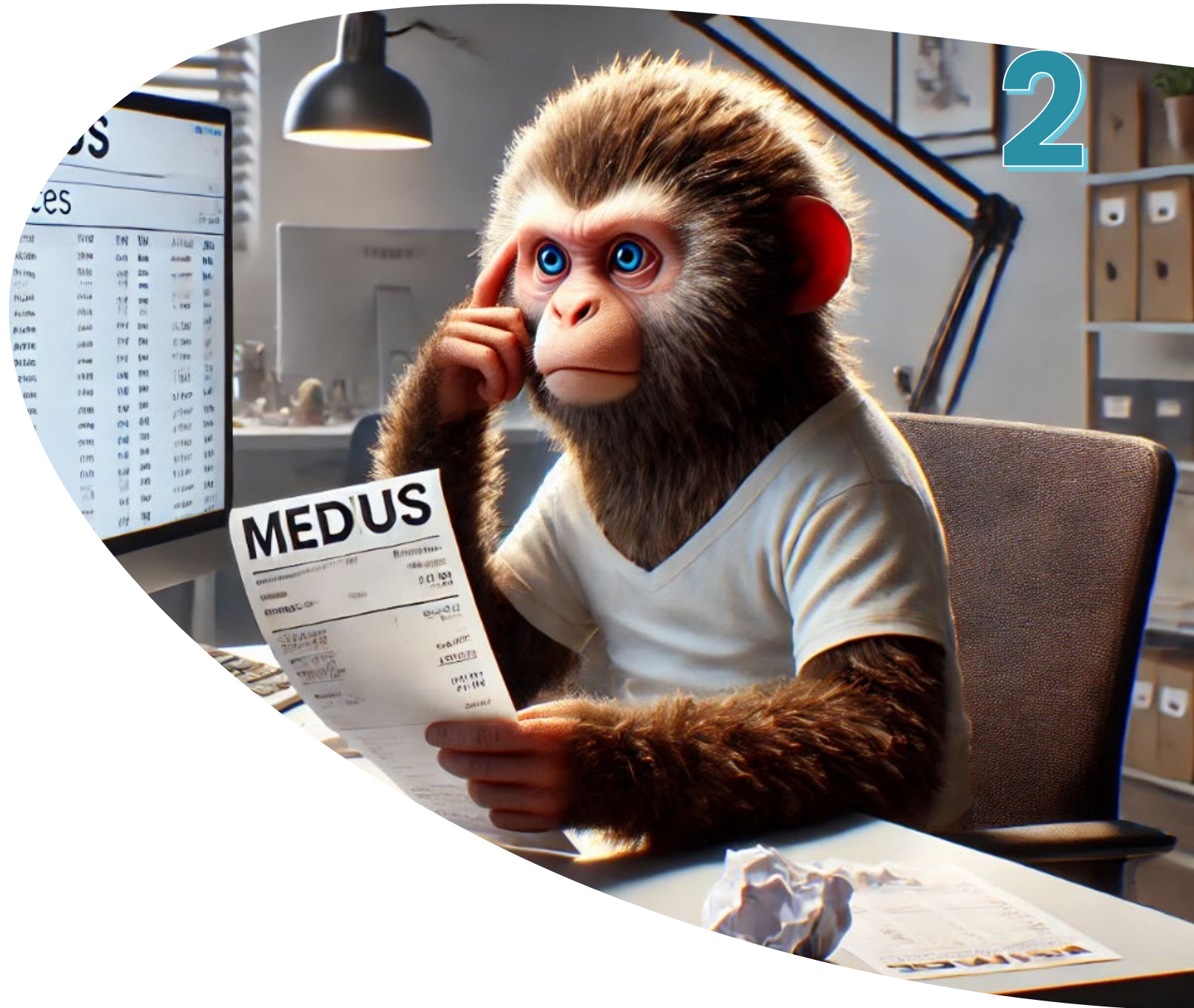
1 PO invoice

2 Name: Freight 3 Item number: *Freight* 4 Description: *Freight* 5 Active: Yes No

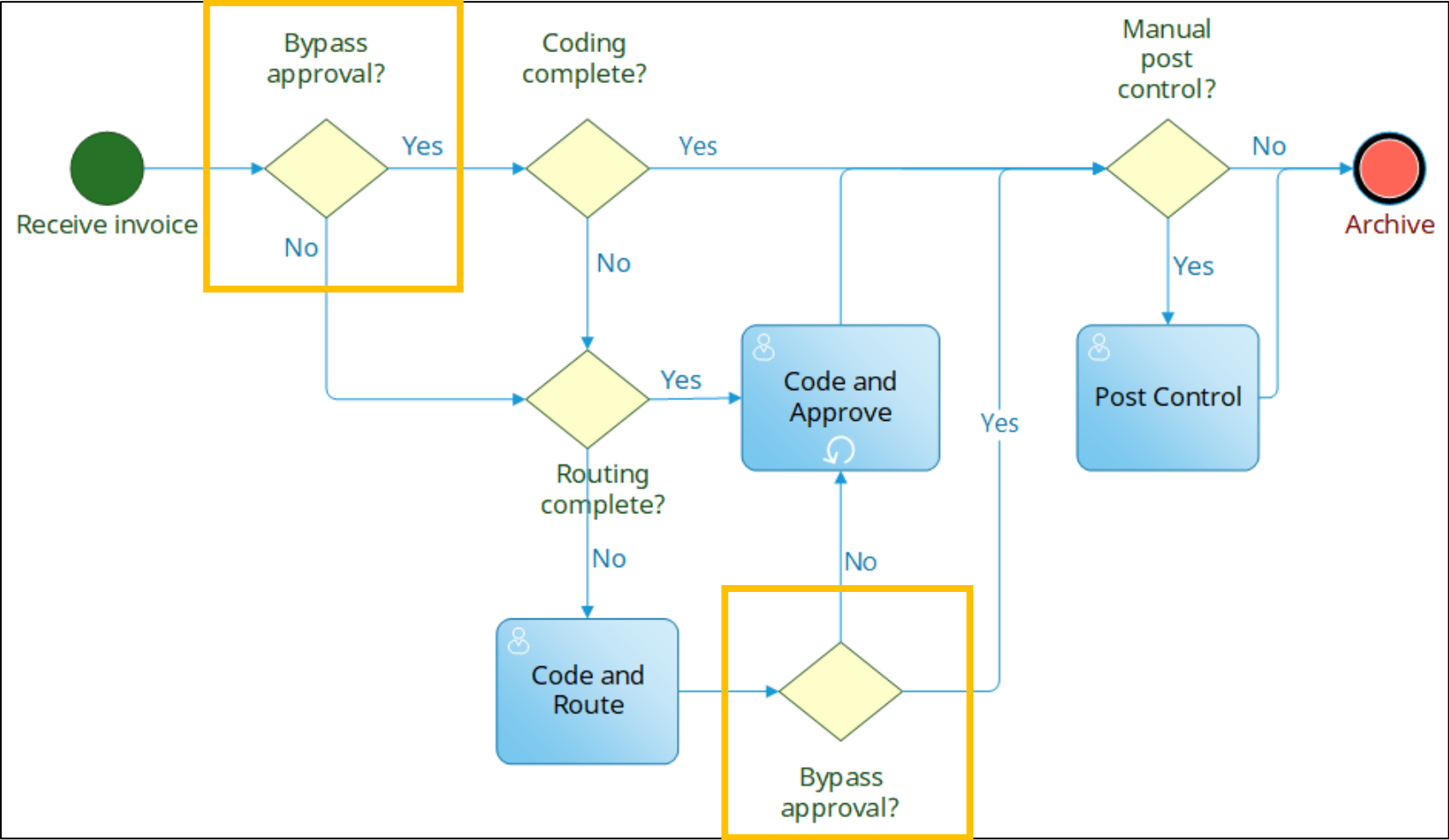
6 Amount limit: 100.00 7 Unit price limit: 8 Percentage limit: 5.00 9 Distribute proportional: Yes No

10 Coding: 6740 SaC SaC SaC 11 Tax indicator 1: S25 Tax indicator 2:

«Some Non-PO invoices actually do not need approval..»

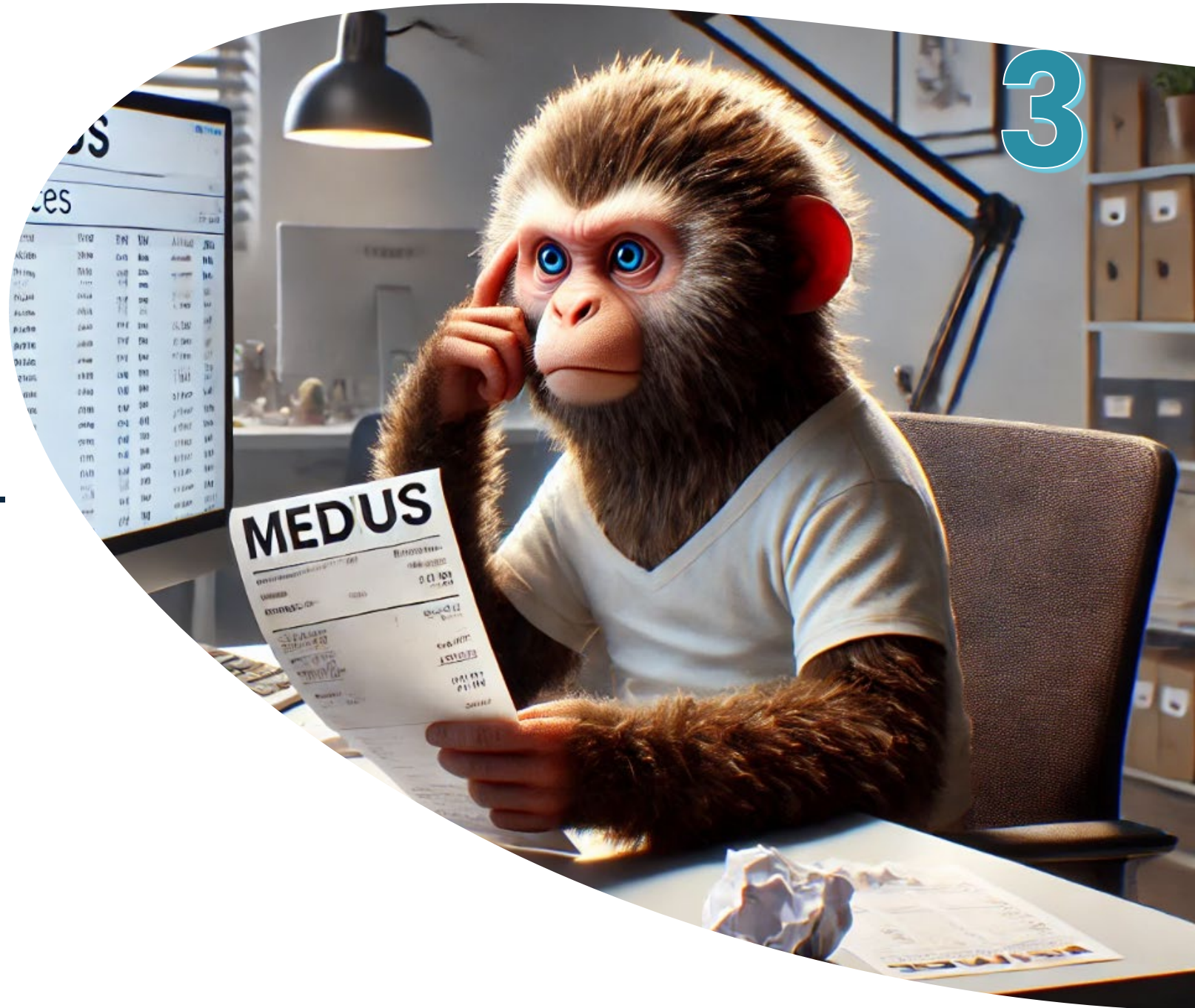


Pre approved invoices





«Why do I get 10 empty coding lines on this Non-PO invoice?»



3

Remove empty coding lines


3

AP Automation [HOME](#) [INBOX](#) [DASHBOARD](#) [REPORTS](#) [CREATE](#)

Add/remove labels

Wards Catering Services

1200 Spring Valley Road
Pottstown, PA 19464
Phone 800 679 1223
Fax 610 555 5767



INVOICE

INVOICE: 70912
DATE: 1/1/2021

COMMENTS OR SPECIAL INSTRUCTIONS:

Item #	Description	Quantity	Unit Price	Extended Amount
1	Deluxe Sandwich Platter	2	\$34.16	\$68.32
2	Egg Salad (Large)	2	\$15.50	\$31.00
3	Potato Salad (Large)	2	\$12.00	\$24.00
4	Cookie Party Tray	2	\$15.00	\$30.00
5	Plates, Silverware, Napkins (10 pack)	2	\$5.75	\$11.50
6	Soda x 2ltr (Various)	2	\$3.24	\$6.48
7	Black Forest Gateaux (Large)	2	\$25.89	\$51.78
8	Delivery	1	\$30.00	\$30.00
Sub-Total				\$253.08
Tax				\$0.00
Total				\$253.08

Make all checks payable to **Wards Catering Services**

If you have any questions concerning this invoice, contact: **Accounts Receivable at 800 679 1223** or email **AR@RCBInc.com**.

WE APPRECIATE YOUR BUSINESS.

Route - Non-PO invoice 70912

Supplier Id **032** Net amount **253.08 USD** Invoice date **1/1/2021** Invoice no **70912**
Supplier **Wards Catering Services** Tax **0.00 USD** Due date **1/1/2021** Payment ref
Company **Acme Inc.**

[Coding](#) [Invoice details](#) [Comments](#) [File Attachments](#) [History](#) [Links 3](#)

Coded net: 0.00 Coded tax: 0.00 Coded total: 0.00 Coding balance (total): 253.08

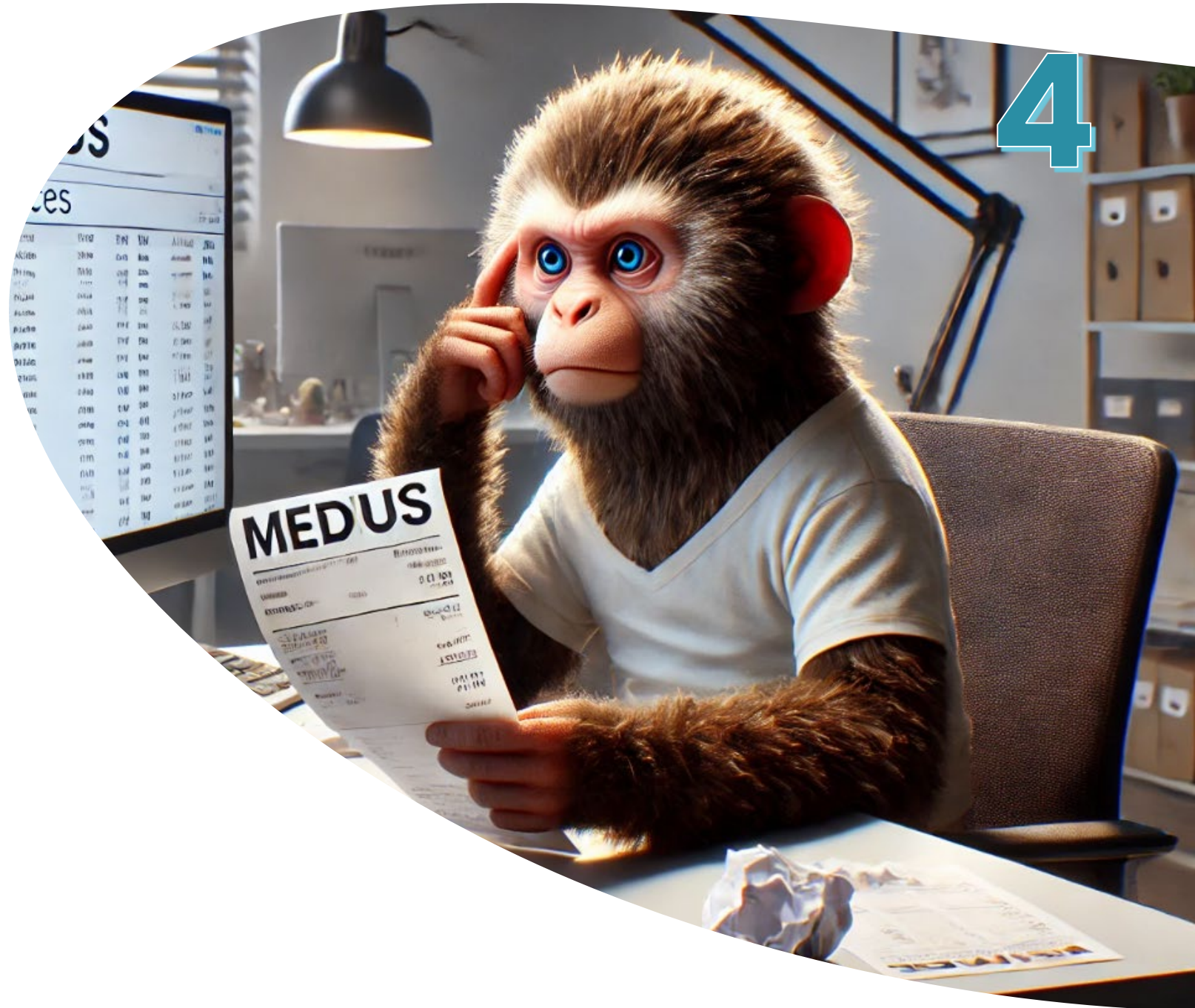
#	Account	Net	Approver
<input type="checkbox"/> 1	G/L Dep CC Proj Desc	68.32	
<input type="checkbox"/> 2	G/L Dep CC Proj Desc	31.00	
<input type="checkbox"/> 3	G/L Dep CC Proj Desc	24.00	
<input type="checkbox"/> 4	G/L Dep CC Proj Desc	30.00	
<input type="checkbox"/> 5	G/L Dep CC Proj Desc	11.50	
<input type="checkbox"/> 6	G/L Dep CC Proj Desc	6.48	
<input type="checkbox"/> 7	G/L Dep CC Proj Desc	51.78	
<input type="checkbox"/> 8	G/L Dep CC Proj Desc	30.00	

Showing 1 to 8 of 8 lines, 0 Selected

0 comments



«It is so annoying to invalidate and edit the invoice if I got one digit wrong in the invoice number..»



Changing invoice number after import

(NON-PO) FIRST TIME RIGHT

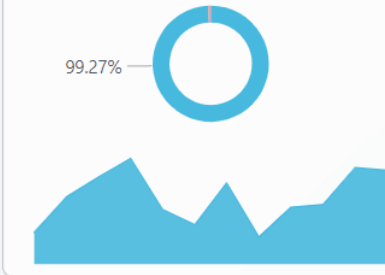
All Companies

01/Oct/23 - 30/Sep/24

Filters

% First Time Right

FTR Invalidated



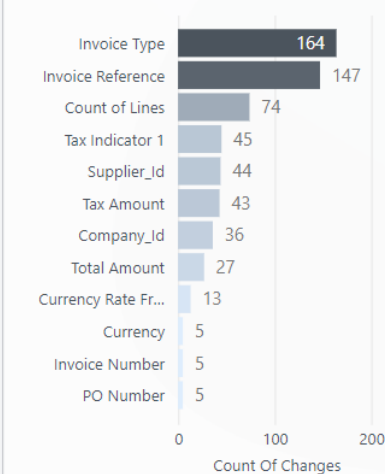
Invalidated Invoices by Company

Company	% Invalidated Invoices	# Invalidated Invoices	# Invoices Archived
Acme Global	0.73%	281	38437
Acme AU		18	18
Acme Europe	0.89%	26	2908
Acme FR	1.43%	7	490
Acme NO	0.18%	2	1118
Acme SE	1.31%	17	1300
Acme North America	0.72%	69	9577
Acme CA	0.79%	52	6553
Acme US	0.56%	17	3024
Acme UK	0.72%	186	25934
Total	0.73%	281	38437

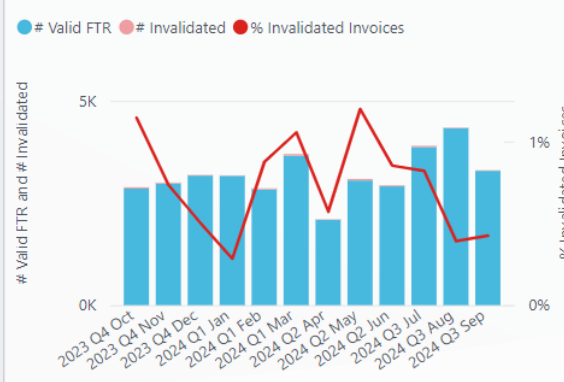
Invalidated Invoices by Supplier

Supplier Name	% Invalidated Invoices	# Invalidated Invoices	# Invoices Archived
Gusikowski-Smitham McOwen Whizystems	4.07%	36	884
An and and An and Marrison Hatch walk	37.50%	12	32
Kshlerin, Waters and Hagenes Maleney	23.68%	9	38
Happindustries			
Rippin, Willms and Poulos Huglin Peachco	10.13%	8	79
Yakitri Jurs Blizzard Co.	9.09%	7	77
Herculie Avrahamian Gillebride Asco	17.14%	6	35
Jefferey Yesinin Aveyard Mercury Coms	10.17%	6	59
Littel-Ruecker Blanch Joy hut	2.74%	6	219
Frontczak & Walkowski Woollard AnticTatlowe World Corp	9.09%	5	55
Scantlebury & Westall Klaassens de Quincey Core hive	4.03%	5	124
Bowcock & Catherall Thirsk Cunio Stardusttechnologies	7.69%	4	52
Buttress and Buttress Cobbold Bridgelectrics	2.16%	4	185
Durgan-Metz Rankine Padlockurity	7.14%	4	56
Gutmaier White Egel Sail	26.67%	4	15
Huel, Zboncak and Rice Smiths Marsh Intelligence	16.00%	4	25
Willms, Parker and Armstrong Gjerde Bridge works	3.23%	4	124
Howe, Shanahan and Cassin Franzke Lion light	2.07%	3	145
Jarrid Monshall Savil Oakoms	3.80%	3	79
Konopelski-Kozey HeimsBezley Revelation Navigations	0.59%	3	512
Mibourne and Kierans Riddle Electronics	4.11%	3	73
Ondricka-Smith Casero Glaciarts	14.29%	3	21
Presco-Brien Gater Angelico	25.00%	3	12
St Clair and Denis Lagoon Arts	1.07%	3	280
Thoughtstorm Mallalieu Lion poly	2.08%	3	144
Total	0.73%	281	38437

Invalidated Invoices Value Change

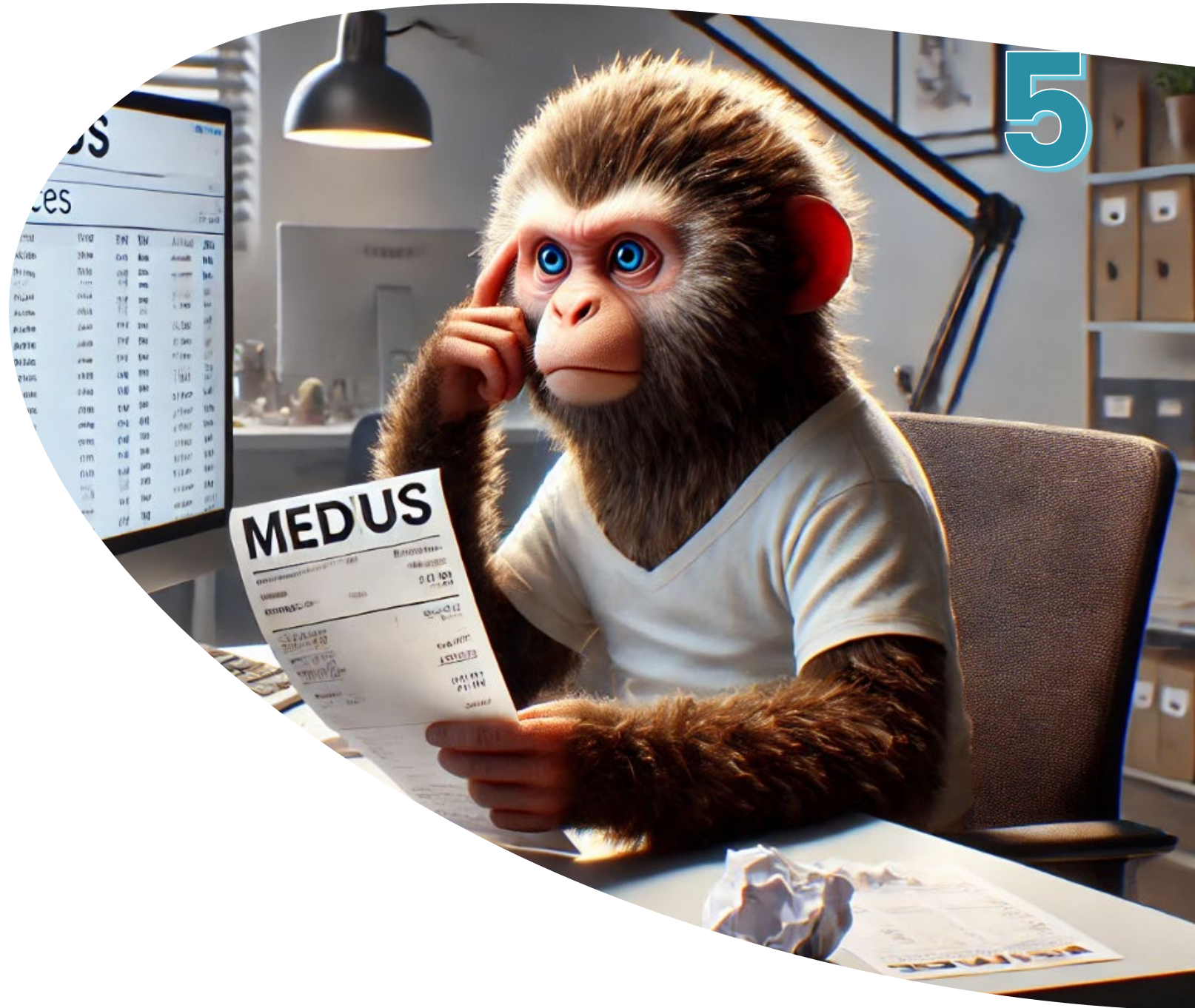


Invalidated Invoices Trend





«It is so annoying to invalidate and edit the invoice if I got one digit wrong in the PO NUMBER..»



Changing order number after import



(NON-PO) FIRST TIME RIGHT

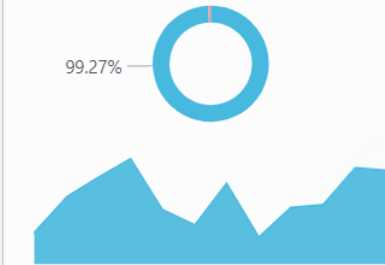
All Companies

01/Oct/23 - 30/Sep/24

Filters

% First Time Right

FTR Invalidated



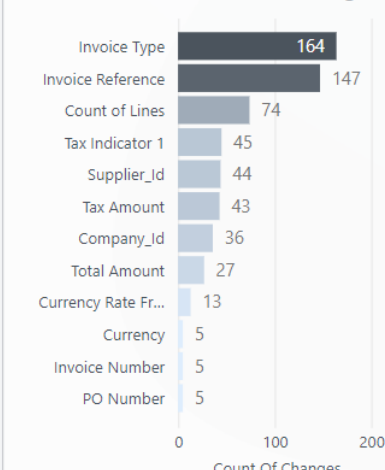
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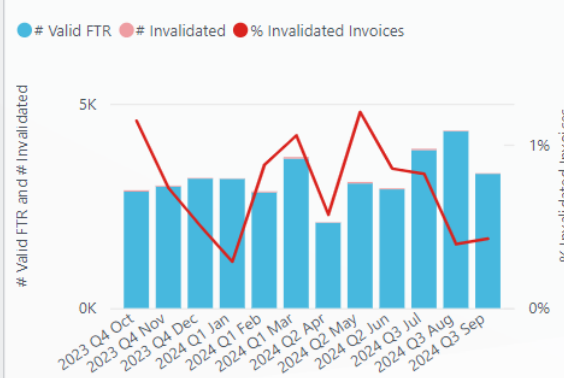
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Invalidated Invoices Value Change

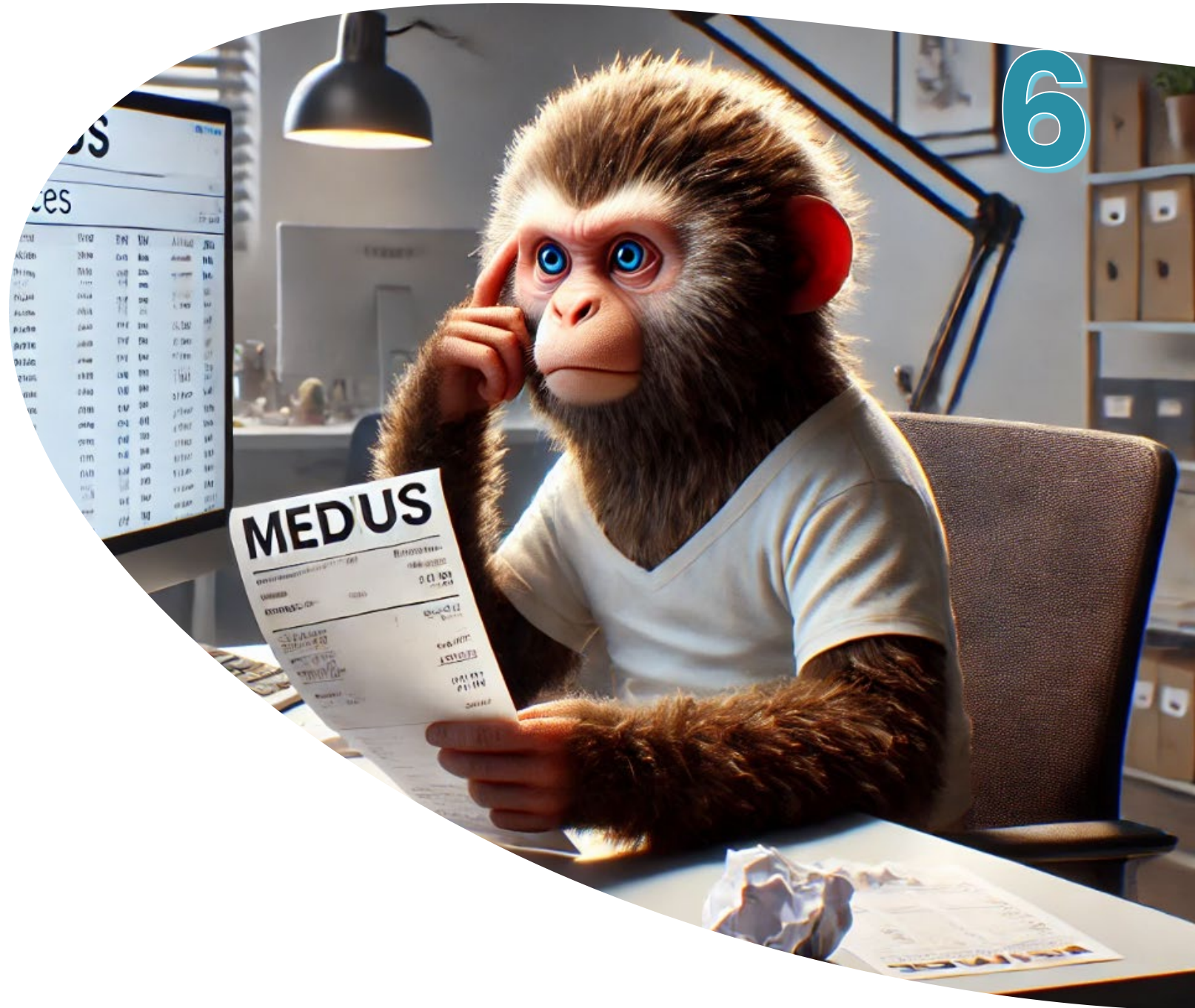


Invalidated Invoices Trend





«I keep having to code these tiny amounts in Post Control, seems like it should be possible to automate!»



Automatic coding of balancing

6

AP Automation | HOME | INBOX | DASHBOARD | REPORTS | CREATE | Search

Document 29 of 34

Post control - PO invoice 56873581

Supplier: FNB, Company: Acme AB, Net amount: 7,636.75 SEK, Tax: 1,909.25 SEK, Invoice date: 9/9/2021, Due date: 10/9/2021, Invoice no: 56873581, Payment ref: #

Invoice details | **Coding** | Comments | File Attachments | History | Links 2

+ Add | Clone | Remove | Filters | More

Coded net: 7,637.00 Coded tax: 1,909.26 Coded total: 9,546.26 Coding balance (total): -0.26

Invoice line	#	number	Code string	Net	Tax group
<input type="checkbox"/>	11	11	5460 10 - - -	390.00	V25
<input type="checkbox"/>	12	12	5460 10 - - -	242.50	V25
<input type="checkbox"/>	13	13	5460 10 - - -	485.00	V25
<input type="checkbox"/>	14	14	5460 10 - - -	1,435.00	V25

Showing 11 to 14 of 14 lines, 0 Selected

← Previous 1 2 Next →

0 comments

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

Save Comment

Save | On hold | Send for review | Control Center | Return | Invalidate | Final approval

FAKTURA

Sida 1

Best.datum: 2021-08-09, Ordernummer: MF-23456, Fakturanummer: 56873581
Fakturadatum: 2021-09-09, Utskriftsdatum: 2021-08-09, Bet kundnummer: 11164, Kundnummer: 11164

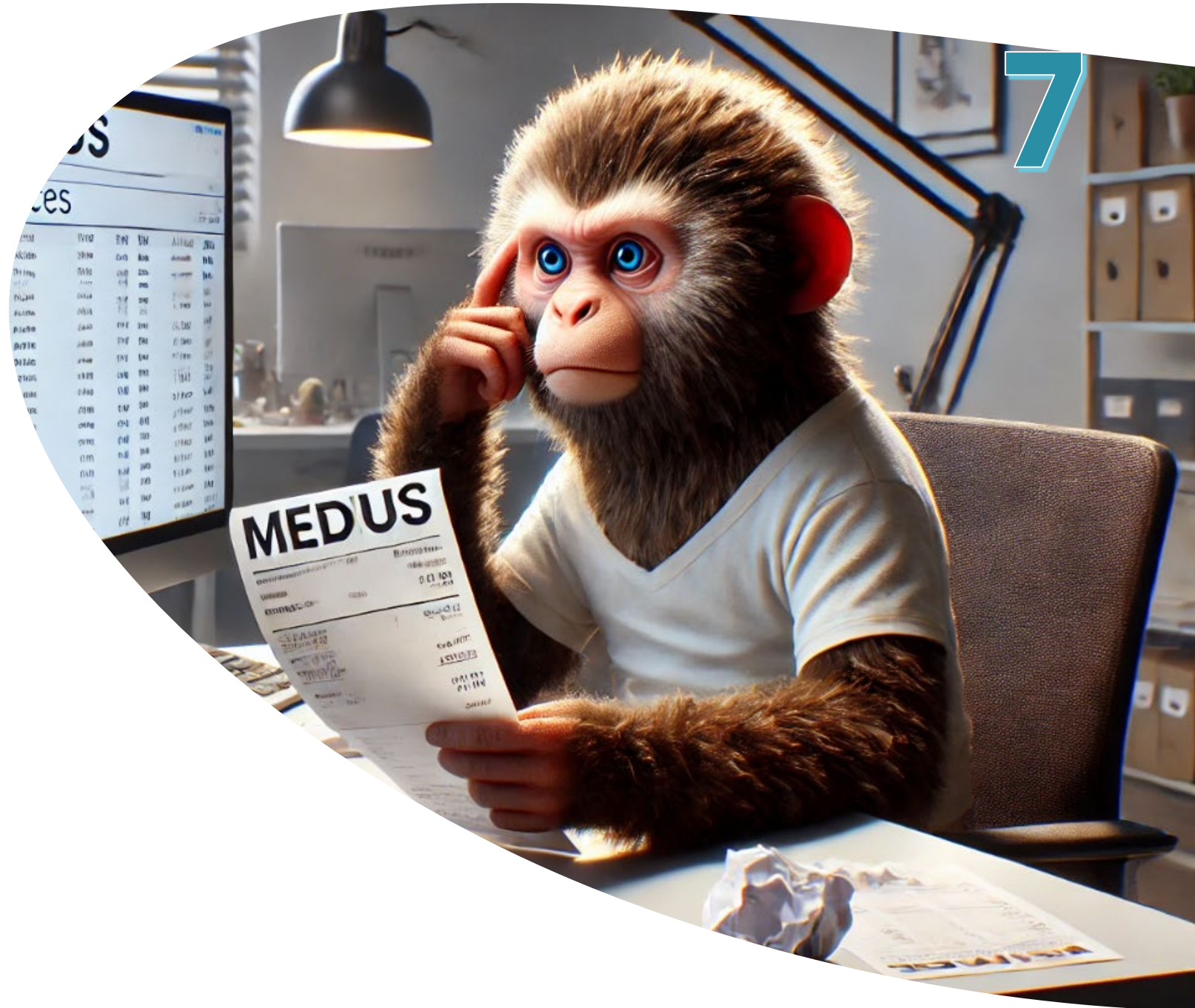
Leveransadress: MEDIUS AB, KLARABERGSVIADUKTEN 90, SE-111 64 STOCKHOLM

Er referens	Leveranssätt	Anläggning	Leveransvillkor
Er referens	Bli		Fraktfritt
Ingår			
Godsämärke	Betalningsvillkor	Kund ID	Objektnummer

Pos	Artikelnummer	Ordernummer	Levererad kvantitet	Enhet	Grundpris	Rabatt/Tillägg	Summa, netto
1	278824 TIGERSÄGBLAD LENOX 118R 300MM-18T BIM 5-PACK	MF-2831	1 0	FRP	219.00	NETTO	219.00
2	5110150 TIGERSÄGBLAD LENOX 818R 200MM-18T BIM 5-PACK	MF-2831	1 0	FRP	1085.00	-	1085.00
3	103359 GÅNGTAPP DORMER E547 G 1/4 NR2	MF-2831	1 0	ST	448.00	-	448.00
4	103961 GÅNGTAPP DORMER E547 G 3/8 NR2	MF-2831	1 0	ST	664.00	-	664.00
5	130494 GÅNGTAPP DORMER E547 G 1/2 NR2	MF-2831	1 0	ST	939.00	-	939.00
7	103755 GÅNGTAPP DORMER E500 M6 NR3	MF-2831	1 0	ST	201.00	-	201.00
9	103762 GÅNGTAPP DORMER E500 M10 NR2	MF-2832	1 0	STK	275.00	-	275.00
10	103767 GÅNGTAPP DORMER E500 M12 NR3	MF-2832	1 0	ST	376.00	-	376.00
11	247549 SPIRALBORR DORMER A002	MF-2832	5 0	ST	130.00	-	650.00



«It is IMPOSSIBLE
to find invoices
that have been
returned from
review!»



Filter documents that have been for review



AP Automation

Home | Inbox | Dashboard | Reports

Filter

Search

Create filter

Workflow

Task | **Document**

Choose task | Choose document type

Document

Documents in review | **Documents on hold**

Show all documents | Show all documents

Hide documents in review | Show only documents on hold

Show only documents in review | Hide documents on hold

Show only documents after review

Properties

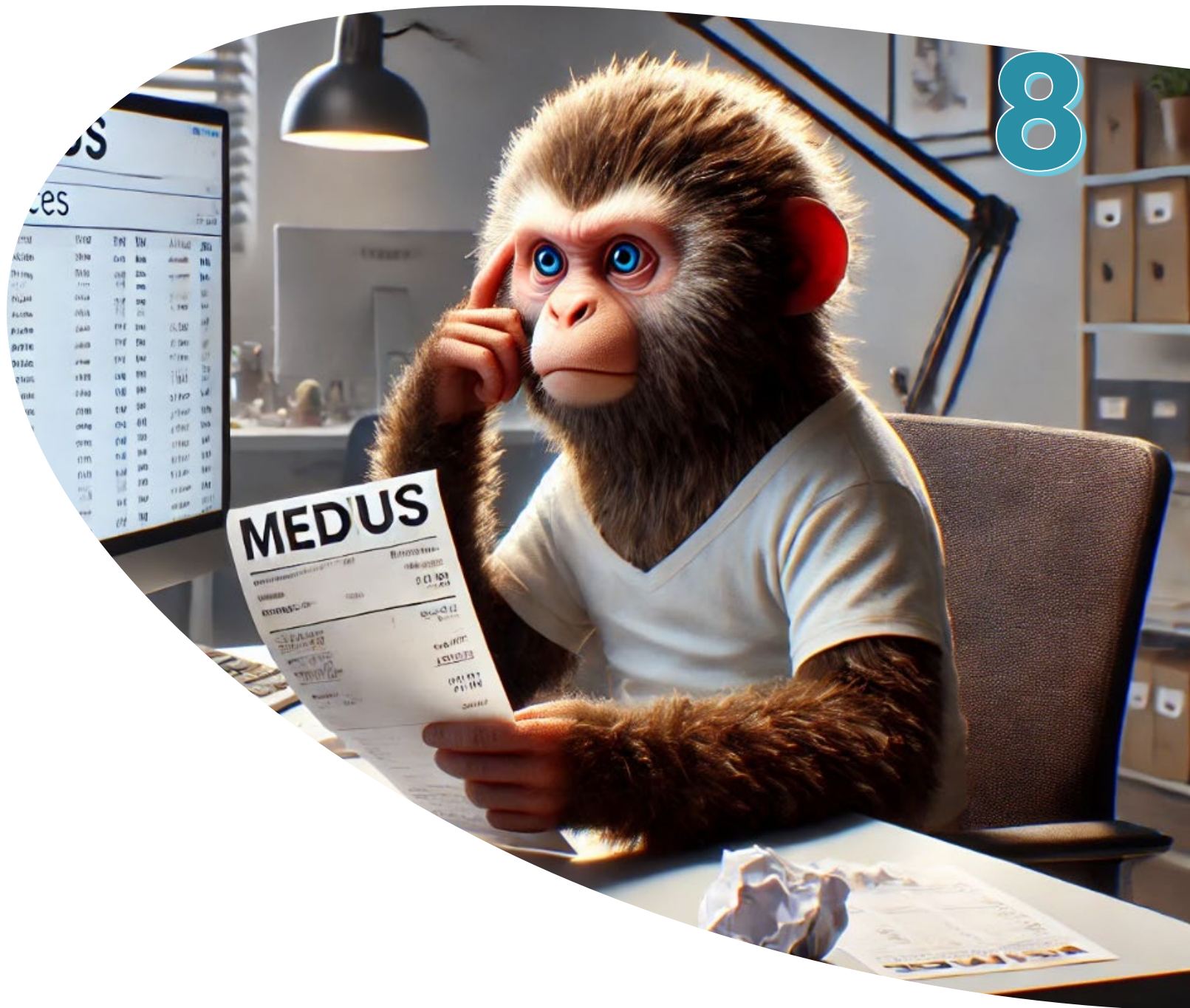
Labels

Choose label | Only documents without labels

Name: Save

+	Approve	Acme Inc.	Amazon Business
+	Route	Acme Inc.	AZ Mobile

«I have activated touchless in Capture, but there are still a lot of invoices that stop for manual verification..»



Hiding fields in Capture

8

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

Filter Search Bulk operation

Incoming invoice (5)

Labels	Indicators	Task	Company	Supplier	Invoice no	Amount	Curren
<input type="checkbox"/>	+	Verify	Acme Inc.		9874592	107,875.00	SEK
<input type="checkbox"/>	+	Verify	Acme Inc.		9874593	107,875.00	SEK
<input type="checkbox"/>	+	Verify	Acme Inc.		9874591	107,875.00	SEK
<input type="checkbox"/>	+	Verify	Acme Inc.		9874595	107,875.00	SEK
<input type="checkbox"/>	+	Verify	Acme Inc.		9874595	107,875.00	USD

Showing 5 out of 5 Show 10 more

Non-PO invoice (9)

Labels	Indicators	Task	Company	Supplier	Invoice no	Amount
<input type="checkbox"/>	Prep...	Post control	Acme Inc.	Clean 'n' Clear	76857	150.00
<input type="checkbox"/>	Smar...	Route	Acme Inc.	Lite n'Easy	7513458	185.80
<input type="checkbox"/>	Smar...	Route	Acme Inc.	Lite n'Easy	7513585	185.80
<input type="checkbox"/>	+	Post control	Acme Inc.	Office Depot	9531475-1	479.00
<input type="checkbox"/>	+	Post control	Acme Inc.	Empire Supplies, Inc.	247531-3	2,178.47
<input type="checkbox"/>	+	Route	Acme Inc.	Wards Catering Services	87824	253.08
<input type="checkbox"/>	Smar...	Route	Acme Inc.	Doors Services	56789	260.65
<input type="checkbox"/>	+	Route	Acme Inc.	Pilkington Office Supplies	004128	4,218.19
<input type="checkbox"/>	+	Route	Acme Inc.	Parking Facility Services	77874	1,500.00

Showing 9 out of 9 Show 10 more

PO invoice (9)

Labels	Indicators	Task	Company	Supplier	Invoice no	PO Nun
<input type="checkbox"/>	PPV	Analyze	Acme Inc.	Acme Office Supplies	35473	MF-322:
<input type="checkbox"/>	Total...	Post control	Acme Inc.	Industriel LLG	MO030914	10-1017
<input type="checkbox"/>	Total...	Post control	Acme Inc.	Industriel LLG	MO030863	10-1017
<input type="checkbox"/>	+	Connect	Acme Inc.	Blue Tooling	5431247-2	478520:
<input type="checkbox"/>	Exce...	Analyze	Acme Inc.	Renegade Catering	5924	MF-324:
<input type="checkbox"/>	Missi...	Analyze	Acme Inc.	Phoenix Supplies Inc.	796594	MF-320:
<input type="checkbox"/>	Com...	Analyze	Acme Inc.	Blue Steel	40959147	MF-328:
<input type="checkbox"/>	Auto	Post control	Acme Inc.	Kallectan	92477	100001

Verify - 9874592

Supplier: Acme Inc. Total amount: 107875.00 Invoice date: 8/30/2024 Invoice no: 9874592

Company: Acme Inc. Due date:

Image Comments (0)

1 of 1 Automatic zoom

J.J. & S. – United Spaces
Waterfrong building
Stockholm
SWEDEN

Tel: +46 (0) 8 884 8090
Fax: +46 (0) 8 884 8843
www.jjs-revision.se

Page: 1 of 1

Date: 30.08.2024
Invoice No: 9874592
Engagement No: c-0112868
Debtor Acc No: D0384777
P.O. Reference: D0384777

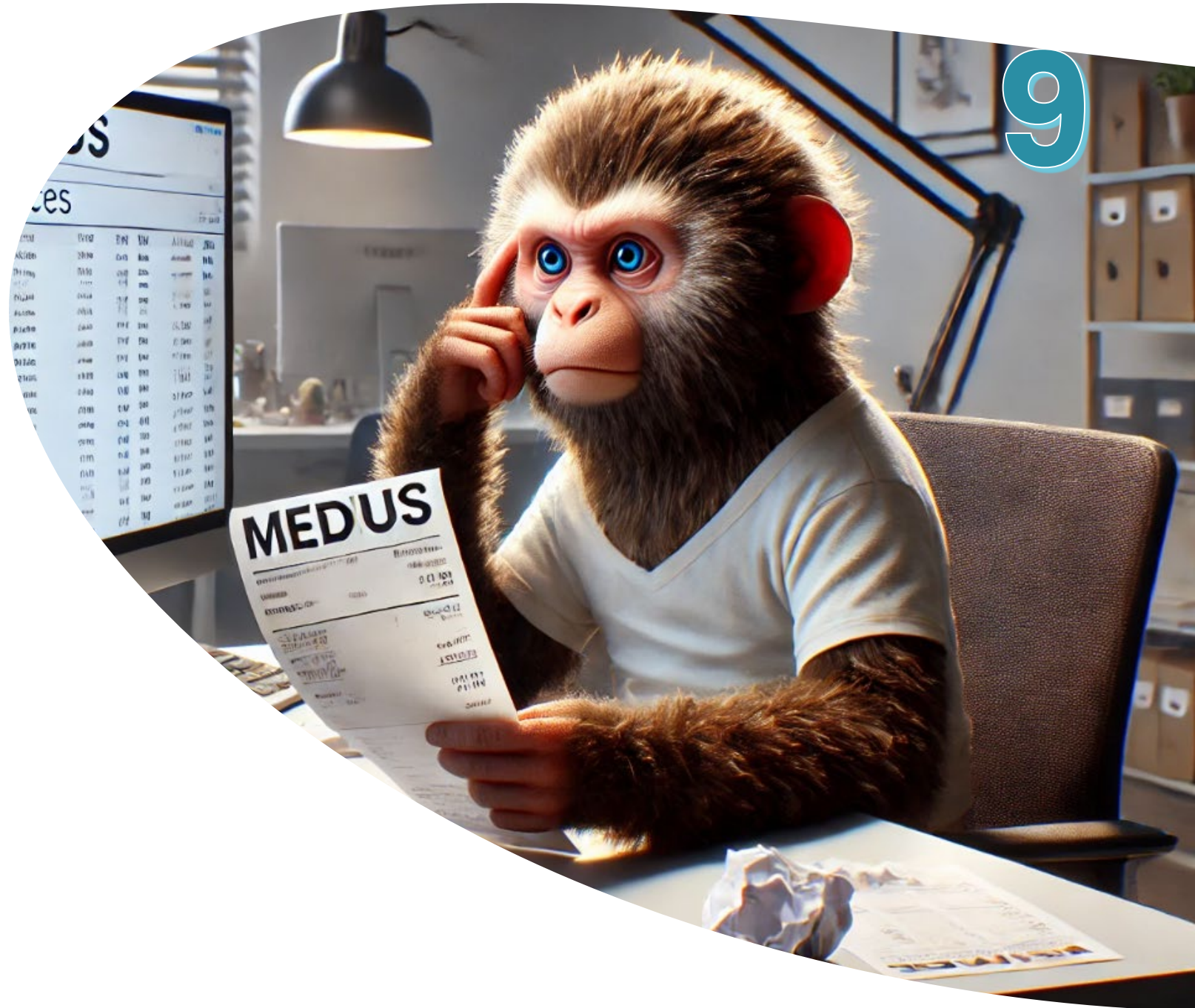
Your VAT Registration No SE5512121212101

Audit fee payment on account - Includes EI 10.20 of expenses

Payment on Account	86,300.00
CI Standard rated output VAT: 25.00%	
VAT at 25.00 % on	86,300.00
Amount Payable SEK	21,575.00
	107,875.00



«Medius should understand that an invoice that differs by 1 cent from the PO amount can be automatically connected»



Connection tolerances



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

Search

Company | + Add

Advanced

Company name	External System ID	Organization Number	Parent company na...	Virtual	Active	Imported timestamp
Root company	root	999999-9999		Yes	Yes	
Acme Inc.	mfen	2	Root company	No	Yes	
MediusFlow SWE	mfse	3	Root company	No	Yes	
MediusFlow FR	mffr	4	Root company	No	Yes	
Acme Cad	mfca	5	Root company	No	Yes	
MediusFlow GER	mfger	6	Root company	No	Yes	
Acme Ltd	mfuk	7	Root company	No	Yes	

Showing 1 to 7 of 7 items

Excel | 1 | 25

Save

General | Enterprise | Non-PO invoice | Custom fields | Payment request | Recurring invoice | Procurement | Prepayment invoice | More

Responsible | Tax | Tolerances | Matching | Coding | Deviation Handling | Import configuration | General

Connection tolerances

Defined in selected company

Line level tolerance + Add

Type	Value	Percentage
Head level tolerance	<input type="text"/>	<input type="text" value="1.00"/>

Showing 1 of 1 item

« 1 »

Deviation tolerances

Defined in selected company

Due date tolerance + Add

Type	Value	Percentage
Unit price positive tolerance	<input type="text"/>	<input type="text" value="1.00"/>
Unit price negative tolerance	<input type="text"/>	<input type="text" value="1.00"/>

Showing 1 to 2 of 2 items

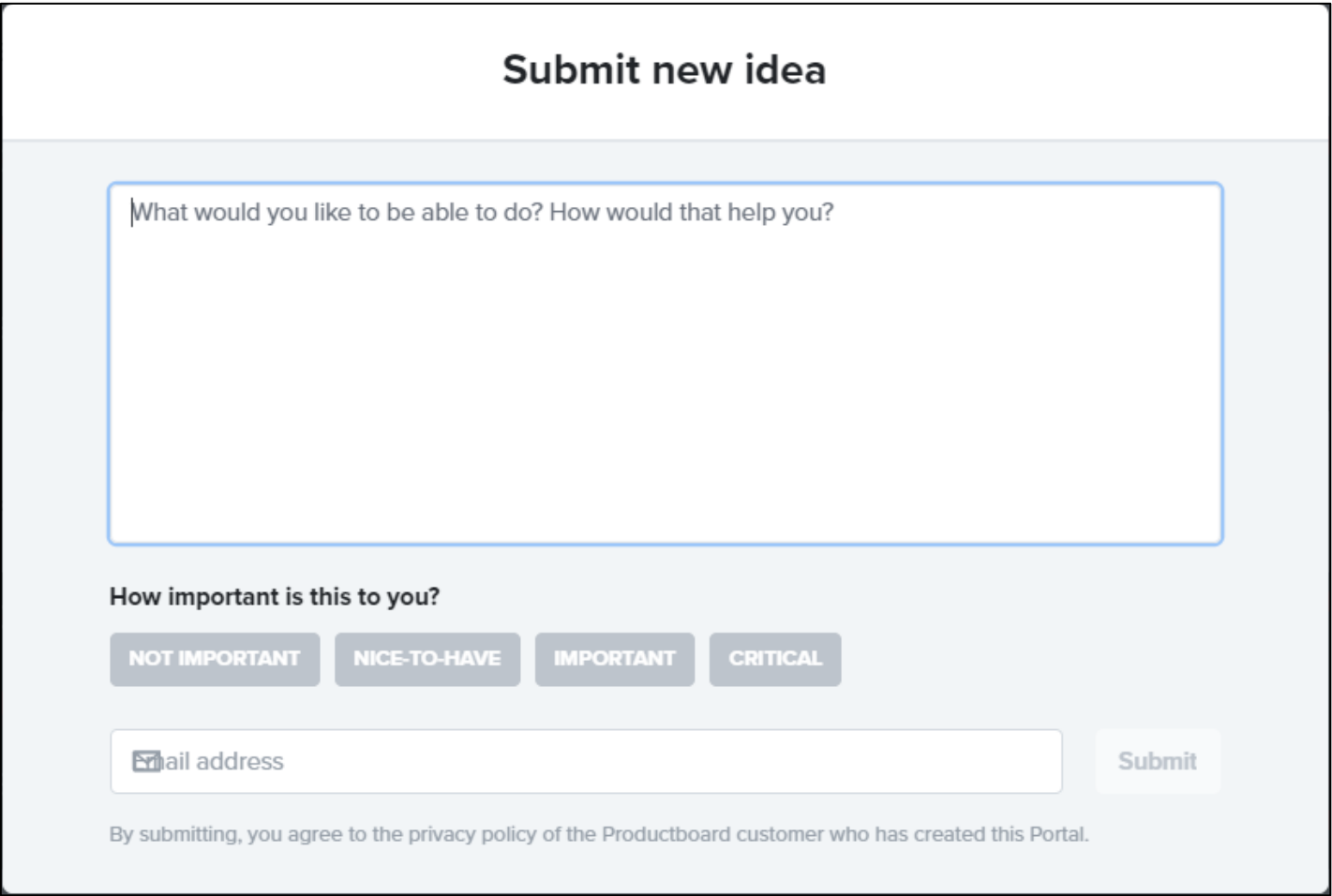
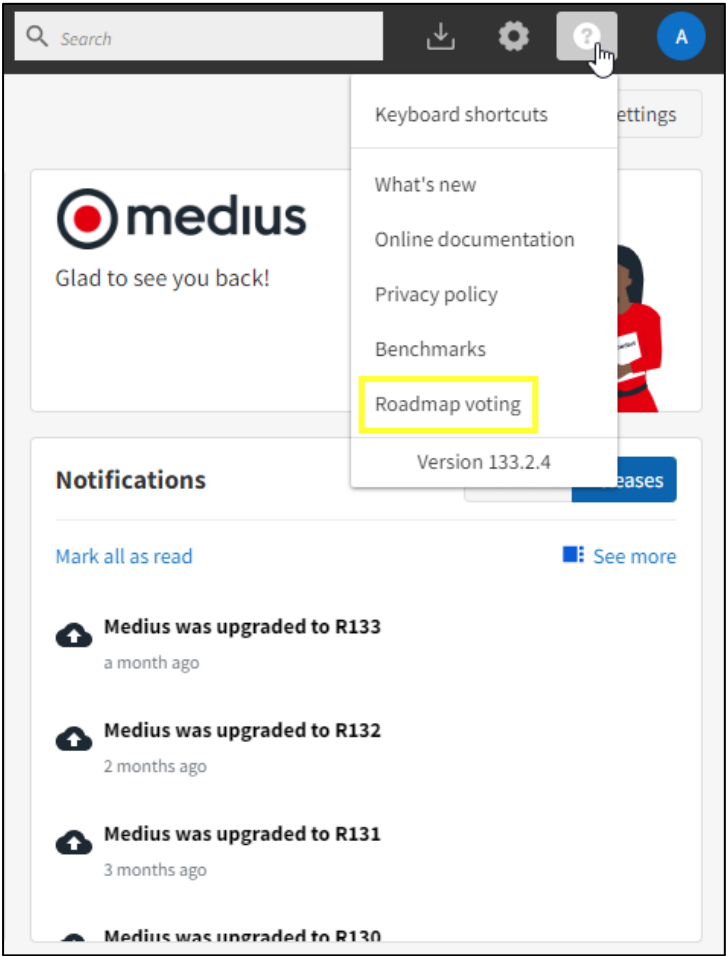
« 1 »

«I really have a TON of great ideas for improving Medius, is there anywhere I can share them so others can see my genius?»



OUR NEW PRODUCT BOARD!

10

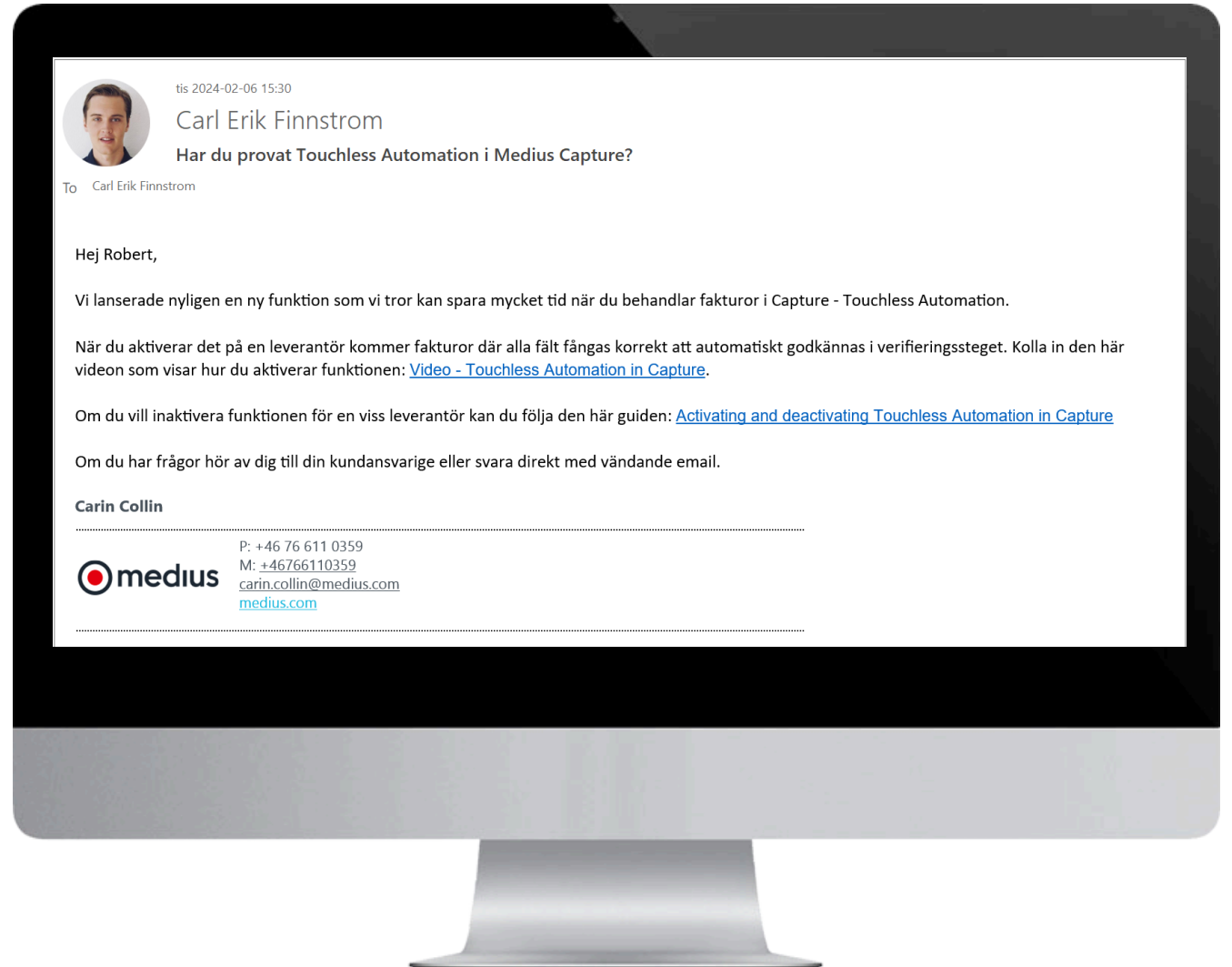


Bi-weekly emails with AP Hacks / Tool tips



*Improve your process –
receive Medius Hacks emails*

- Sent from Medius Customer Success
- Learn how to get the most out of old, and new functionality
- Underutilized features
- New features
- Process enhancement tips
- Medius suite description and product videos



FEEL FREE TO REACH OUT!



Carl Erik Finnstrøm

Customer Success Manager

carl.erik.finnstrom@medius.com