



Konkreta exempel på hur AI förbättrar AP-processen

Maria Snertingdalen, Senior Director Customer Success

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 icon. The main content area shows an invoice for 'TAPEMAN' with the following details:

Invoice address: Medius AB, Klarabergsviadukten 90, 111 64 Stockholm, Sverige
Delivery address: Medius AB, Klarabergsviadukter, 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 with a white border and dark background contains the text: "High rate of first time identification, data cleaning possibilities and intelligent extraction of complex lines".

The invoice items are listed in a table with columns: Article no. / Description, Del., Ordered, Rest, and Amount. Below the invoice items, there is a summary table with columns: Order number, Item number, Item description, Quantity, and Amount.

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 (Vat in the digital Age) and legal mandates changes the invoice landscape

AI can make e-invoices 99%* automated

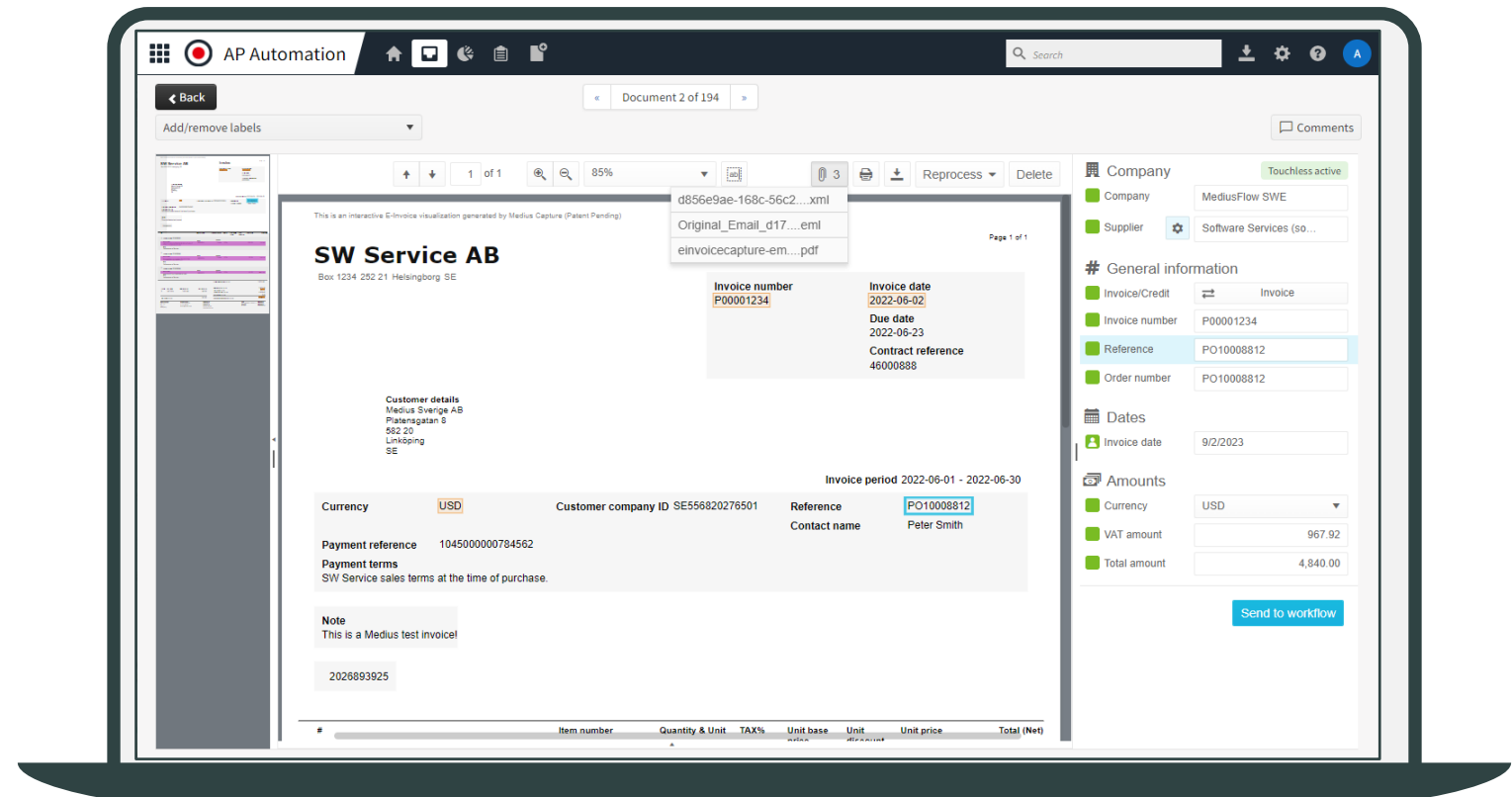
Readable and editable invoice layout with learning

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

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, and Organization number. Below this, the 'Touchless automation' status is shown as 'Active', with a 'Deactivate' button. A progress bar indicates '10 invoices' processed in the last 60 days, with 'Correct' at 30% (3 invoices) and 'Touchless' at 30% (3 invoices). A note at the bottom states 'Touchless automation active. Invoices will be sent to workflow automatically when there are no validation errors. Read more on Success Portal.' To the right, a 'Company' panel shows 'MediusFlow SWE' as the company and 'Software Services (so...)' as the supplier. It also lists 'General information' (Invoice/Credit type, Invoice number, Reference, Order number) and 'Amounts' (Currency, VAT amount, Total amount) with a 'Send to workflow' button.

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 [Deactivate](#)

10 invoices [Deactivate](#)
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. [Success Portal](#)

Company: MediusFlow SWE (Touchless active)
Supplier: Software Services (so...)

General information:
Invoice/Credit: Invoice
Invoice number: 0001234
Reference: Peter Smith
Order number: 10008812

Amounts:
Currency: USD
VAT amount: 967.92
Total amount: 4,840.00

[Send to workflow](#)

The logo for KBYGG, featuring a stylized orange 'K' with a horizontal bar through it, followed by the letters 'BYGG' in white. The logo is set against a dark red square background with a white border.

KBYGG

“ 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, there is a list of invoices with columns for status, company, document, supplier, invoice number, voucher number, and amount. A 'Non-PO invoice (21)' section is expanded, showing a list of invoices with 'Route' tasks. 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 four lines of items with their respective codes, descriptions, net amounts, tax groups, and approvers.

#	Codes	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 content and invoice coding, thereby adapting proposals accordingly.

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

Document 11 of 35

Approve - Non-PO Invoice 7010899Demo1

Supplier: Lite n' Easy Perth Pty Ltd | Net amount: 300.48 AUD | Invoice date: 19/07/2023 | Invoice no: 7010899 | Company: Trans Opt A&S | Tax: 30.08 AUD | Due date: 18/08/2023 | 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 you can accept or reject. Just undo and apply your own.

Coded net: 200.43 Coded tax: 22.05 Coded total: 222.48

Code using: 1 | 01 | 7100 | 62923 | 1021129

Showing 1 to 1 of 1 lines, 0 Selected

1 comments

Net Approver: claire - AP Officer (claire) | Approve/Reject

Save Comment

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

Lite n' Easy | Lite n' Easy Perth Pty Ltd | ABN: 33 011 820 | 13 15 12 | Lite n' Easy Head Office 18 Buchanan Rd, BANYO QLD 4014

TAX INVOICE

Invoice No: 7010899 | Invoice Date: 19-Jul-23 | Reference: | Delivery Date: 19-Jul-23 | Provider Code: JUN0001

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

Document 35 of 35

Approve - Non-PO Invoice 7012065Demo2

Supplier: Lite n' Easy Perth Pty Ltd | Net amount: 341.42 AUD | Invoice date: 28/07/2023 | Invoice no: 7012065 | Company: Trans Opt A&S | Tax: 14.14 AUD | Due date: 22/08/2023 | 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 you can accept or reject. Just undo and apply your own.

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

Code using: 1 | 01 | 7100 | 62923 | 10123292

Showing 1 to 1 of 1 lines, 0 Selected

1 comments

Net Approver: claire - AP Officer (claire) | Approve/Reject

Save Comment

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

Lite n' Easy | Lite n' Easy Perth Pty Ltd | ABN: 33 011 820 | 13 15 12 | Lite n' Easy Head Office 18 Buchanan Rd, BANYO QLD 4014

TAX INVOICE

Invoice No: 7012065 | Invoice Date: 28-Jul-23 | Reference: | Delivery Date: 28-Jul-23 | Provider Code: JUN0001

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

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 reporting (e.g CSRD) 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...

The screenshot displays the 'AP Automation' software interface. At the top, there is a navigation bar with 'Home', 'Inbox', 'Dashboard', 'Reports', and 'Create' buttons, along with a search bar. Below the navigation bar, there is a 'Back' button and a 'Document 3 of 18' indicator. The main content area shows invoice details and a table of line items. The line items table has columns for 'Item nbr', 'Description', 'Qty delivered', 'Qty ordered', 'Unit price', and 'Amount'. The items are highlighted with pink boxes. A summary table at the bottom right shows 'Quantity' and 'Amount' for each item, with the 'Quantity' column highlighted by a red box.

Invoice Details:

Due date:	12/09/2021	Contract nbr:	46000888
Your ref:	Peter Smith	Our ref:	Carmen Johansson
Order nbr:	PO10008812	Period:	October 2021

Line Items Table:

Item nbr	Description	Qty delivered	Qty ordered	Unit price	Amount
1	10005011 OFFICE 365 ENTERPRISE E5 WITHOUT PSTN	1,00	1,00	350,00	350,00
2	10005024 SKYPE FOR BUSINESS ONLINE-PLAN	3,00	4,00	39,56	118,68
3	10005032 SKYPE-PSTN-CONFERENCING	83,00	78,00	41,00	3 403,00

Summary Table:

Order number	Item number	Item description	Quantity	Amount
1	10008812	10005011 OFFICE 365 ENTERPRISE E5 WITHOUT PSTN	1	350.00
2	10008812	10005024 SKYPE FOR BUSINESS ONLINE-PLAN	3	118.68
3	10008812	10005032 SKYPE-PSTN-CONFERENCING	83	3,403.00

Report on 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

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

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

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	MediusFlow SWE
+		Route	MediusFlow SWE
+		Route	MediusFlow SWE
+	%	Route	MediusFlow SWE
+		Route	MediusFlow FR

Showing 1 to 10 of 16 lines, 0 Selected

0 comments

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

Save | On hold | Send for review

Coding table (red X):

#	Code string	Net	Tax group	Approver
1	Konto Avd KST Proj Fritext	219.00	V25	
2	Konto Avd KST Proj Fritext	1,085.00	V25	
3	Konto Avd KST Proj Fritext	448.00	V25	
4	Konto Avd KST Proj Fritext	664.00	V25	
5	Konto Avd KST Proj Fritext	939.00	V25	

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

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

Showing 1 out of 1 | Show 10 more

Non-PO invoice (17)

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

Showing 1 to 10 of 16 lines, 0 Selected

0 comments

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

Save | On hold | Send for review | Control Center | Invalidate | Route

Updated coding table:

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

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 on the right. Below the navigation, there is a 'Back' button and a document viewer showing 'Document 6 of 40'. The main content area features the 'BLUE STEEL' logo and contact information for Blue Steel Manufacturing: 1 Blue Steel Way, Fort Worth, TX 76031, Tel: +1 817 786 1212. Below this, there is a 'PURCHASE ORDER' section with 'SHIP TO' information for Acme Industries. A 'COMMENTS OR SPECIAL INSTRUCTIONS' section is followed by a table with columns for PO, ITEM, QTY, and DESCRIPTION. The table contains two rows of data.

A modal form for 'Supplier onboarding' is overlaid on the screen. It contains the following fields:

- Supplier name: Blue Steel Manufacturing
- Supplier contact first name: Amy
- Supplier contact last name: (empty)
- Supplier contact email address: amy@bluesteel.com
- Supplier contact phone number: +1 817 786 1212
- Invoice number: 40957021

The modal also includes a 'Request a new supplier' button, which is highlighted by a callout box. The callout box contains the text: "Kick off the onboarding process from the invoice, if the supplier is not recognized." Other buttons in the modal include 'Cancel', 'Submit', and 'Send to workflow'.

On the right side of the modal, there is a 'Company' section with 'Acme Inc.' and a 'Supplier' section with a 'Request a new supplier' button. Below this is a 'General information' section with fields for 'Invoice/Credit' (Invoice), 'Invoice number' (40957021), 'Reference', and 'Order number' (3283). There is also a 'Dates' section with 'Invoice date' (1/19/2023) and an 'Amounts' section with 'Currency' (USD), 'VAT amount' (0.00), and 'Total amount' (6,013.09).

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

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 several suppliers with their respective statuses and progress bars. The 'Current Approvers' column shows 'Administrator' and 'Leonard Greenberg' for 'The Rice Man Inc.', with a '+1' button next to the name.

Supplier Name ↑	Supplier Status	Progress	Accessed	Responded	Stage	Current Approvers
Bunzl Cleaning & Hygeine 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

Medius supplier onboarding

For your suppliers

- Access a single-instance self-service portal for all customers
- Provide the necessary information required for onboarding to a customer
- Collaborate with multiple customers in a single place
- Provide data once and avoid duplication

For you

- Make sure you are compliant to the requirements you have on your suppliers
- Avoids the need to onboard suppliers from scratch
- Up to date supplier information
- Reduces the need to request duplicated data
- Automatic import to your ERP system (if supported)

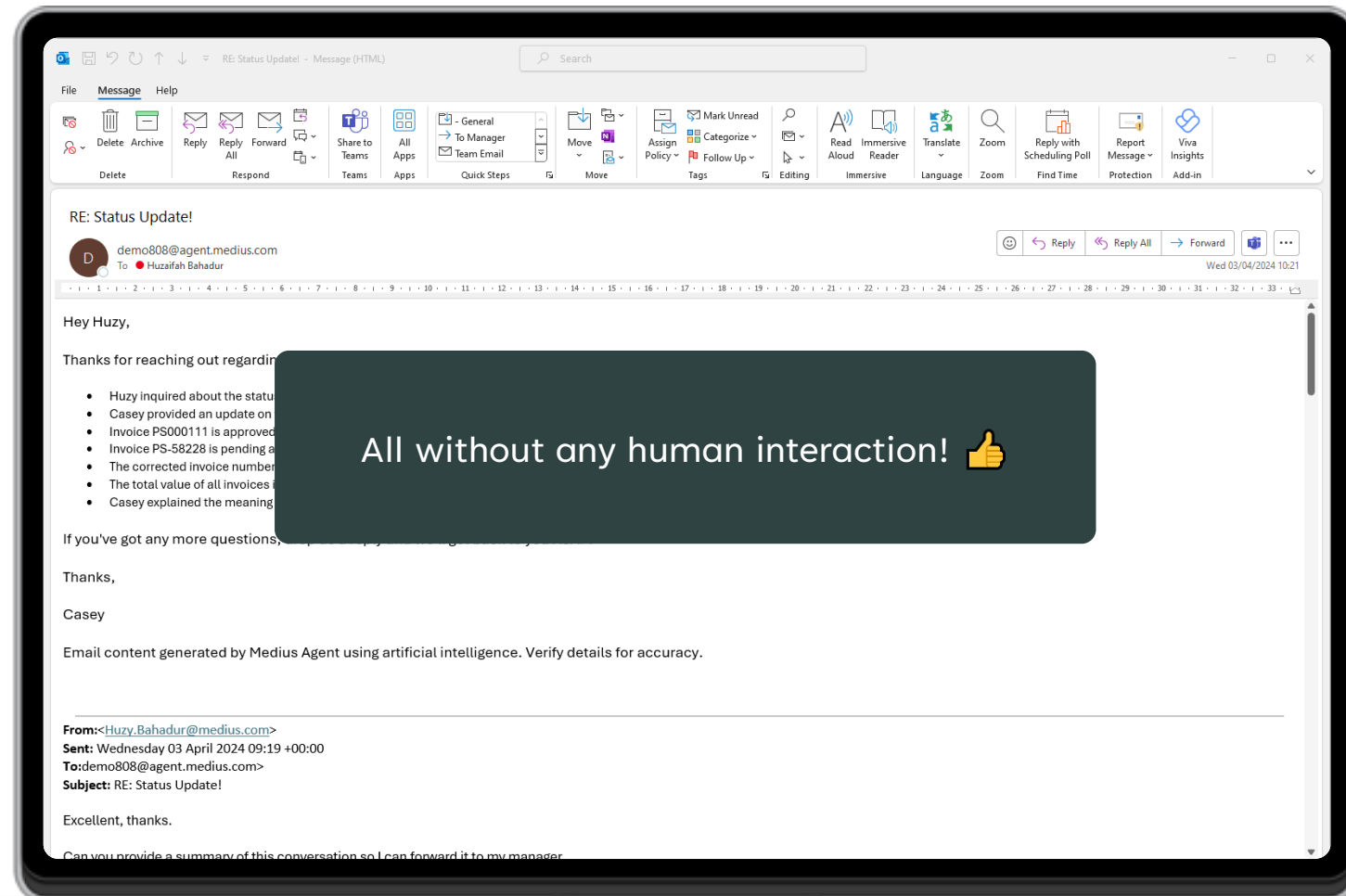
Speaking about suppliers...

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

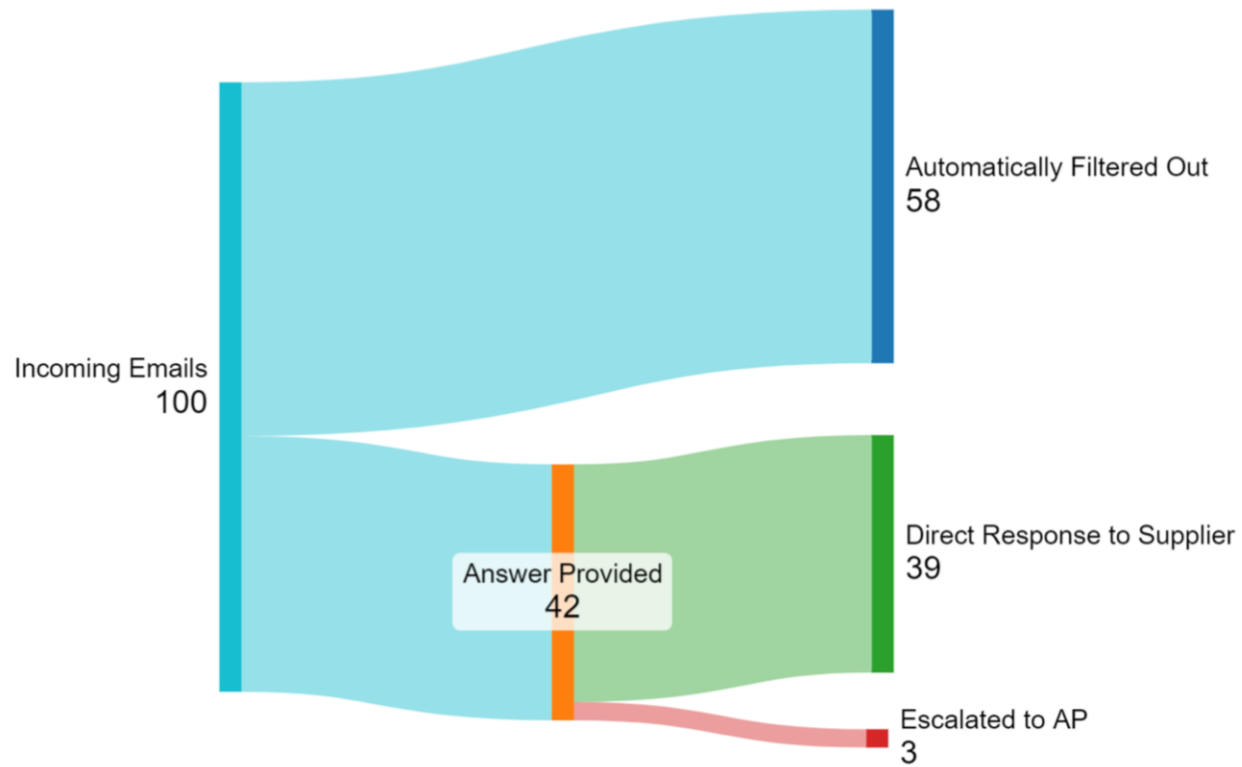
Medius Supplier Conversation

demo808@agent.medius.com

- 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.



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



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 software interface for invoice management. The main content area shows an invoice titled "Faktura" with the following details:

- Fakturadatum: 2024-03-31
- Order nr: 14665413
- Faktura nr: 10255603
- Kund nr: 186251
- Sida 1 / 1

The invoice address is: Medius Sverige AB, Klarabergsviadukten 90, 111 64 Stockholm, Sverige.

Reference information includes:

- Er referens: 1704
- Godsmärke: IT-staben
- Ert inköpsnummer: 4571224509
- Vår referens: DACSA WEBSYSTEM-4

A table at the bottom of the invoice details shows 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

On the right side, a "Risks" panel is open, showing 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 interface also includes a "Company" section with details for "BZ Test2-GA" and "Barista Online AB (barista)", and a "General information" section with fields for Invoice number (10255603) and IBAN (SE5780000890119247845576). A "Send to workflow" button is visible 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

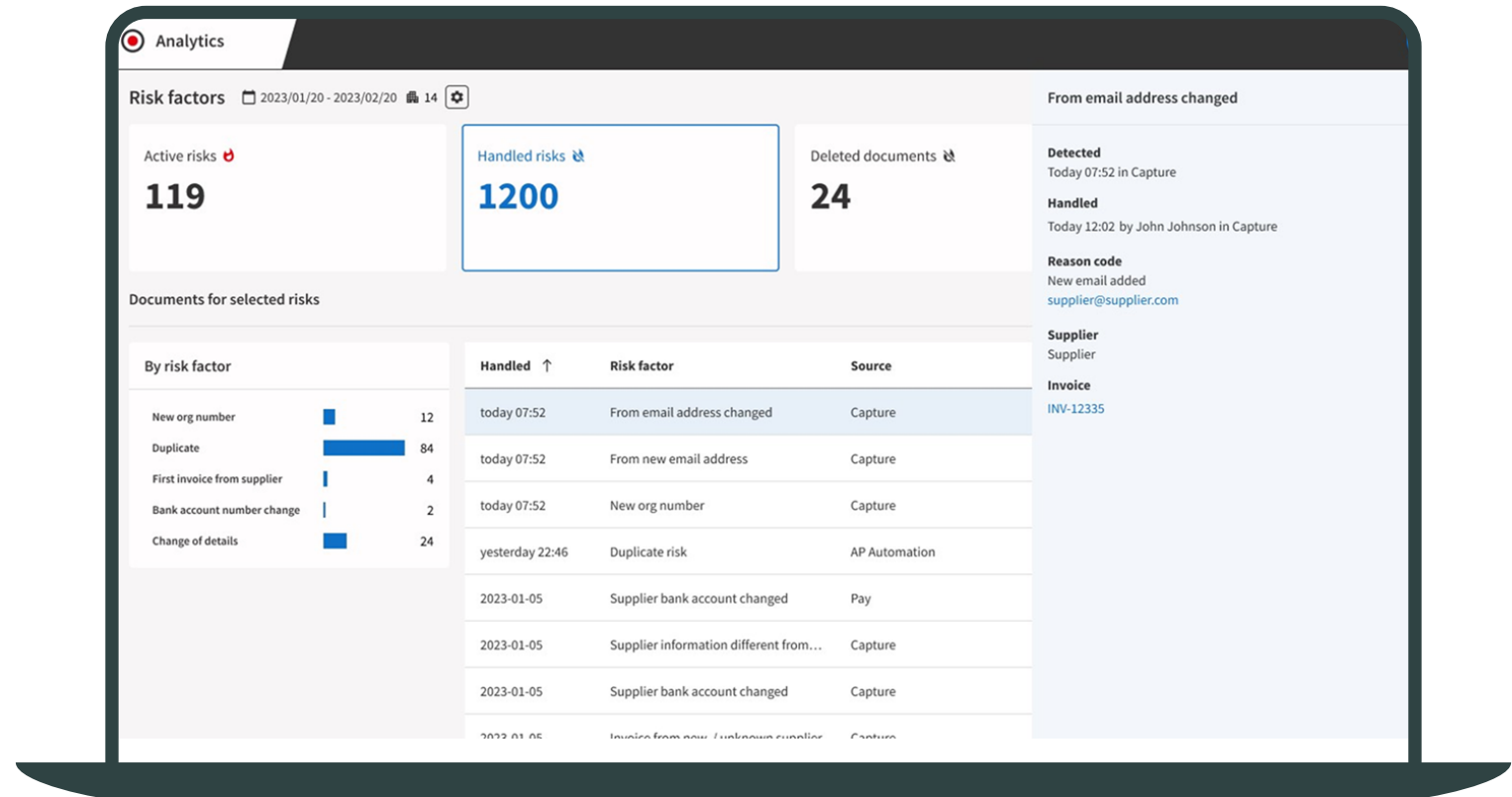
Organization number change and validation

- Ensure payment to correct supplier

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!

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.

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 level](#) and fetching the first authorizer from a [routing table](#). Another option is [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 [connection](#).

Capture: Recommend that you activate [Touchless Capture](#) - your document images of the invoices, are sent to the workflow with "one click" that ~53% of the invoices, are sent to the workflow with "one click".

Good luck trying out these tips, and don't hesitate to reach out to our PS team if 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 Business Outcomes

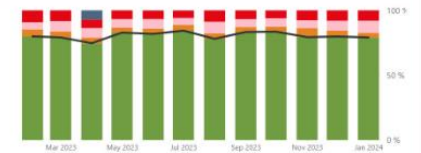
COMPANY X

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



● Touchless
● Manual Connect & no manually Analyzed deviations
● Automatic Connect, manually Analyzed deviations
● Manual Connect & manually Analyzed deviations
● Other manual tasks



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

Medius Elevate – Your personal Advisor

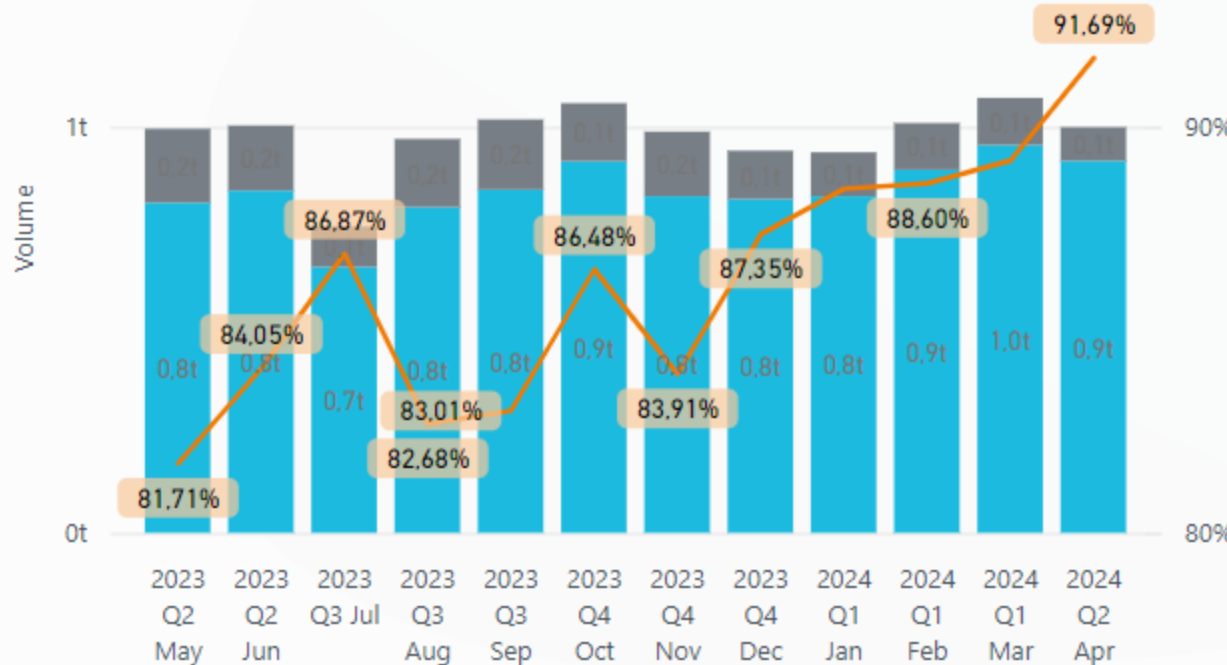
If you make continuous improvements a priority, and if you want to maximize your efficiency, Medius Elevate is designed to help you reach your organization's goals.

- 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

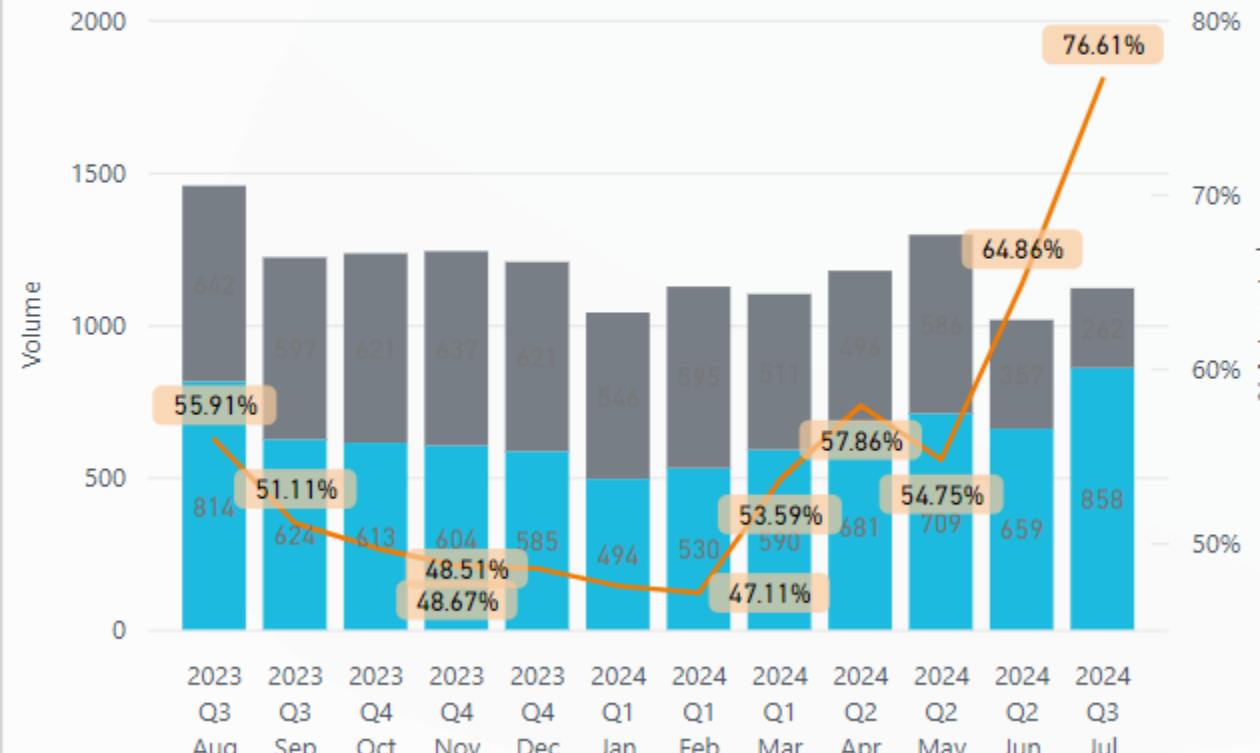
Touchless Invoices Trend

● # Automated ● #Manual ● % Automated



Touchless Invoices Trend

● # Automated ● #Manual ● % Automated





Our vision:

You are in control..

**... WITH
SUPERPOWERS**

Thank you.

