Medius Top Tips 💡 #1

Carl Erik Finnstrøm, Customer Success Manager EMEA
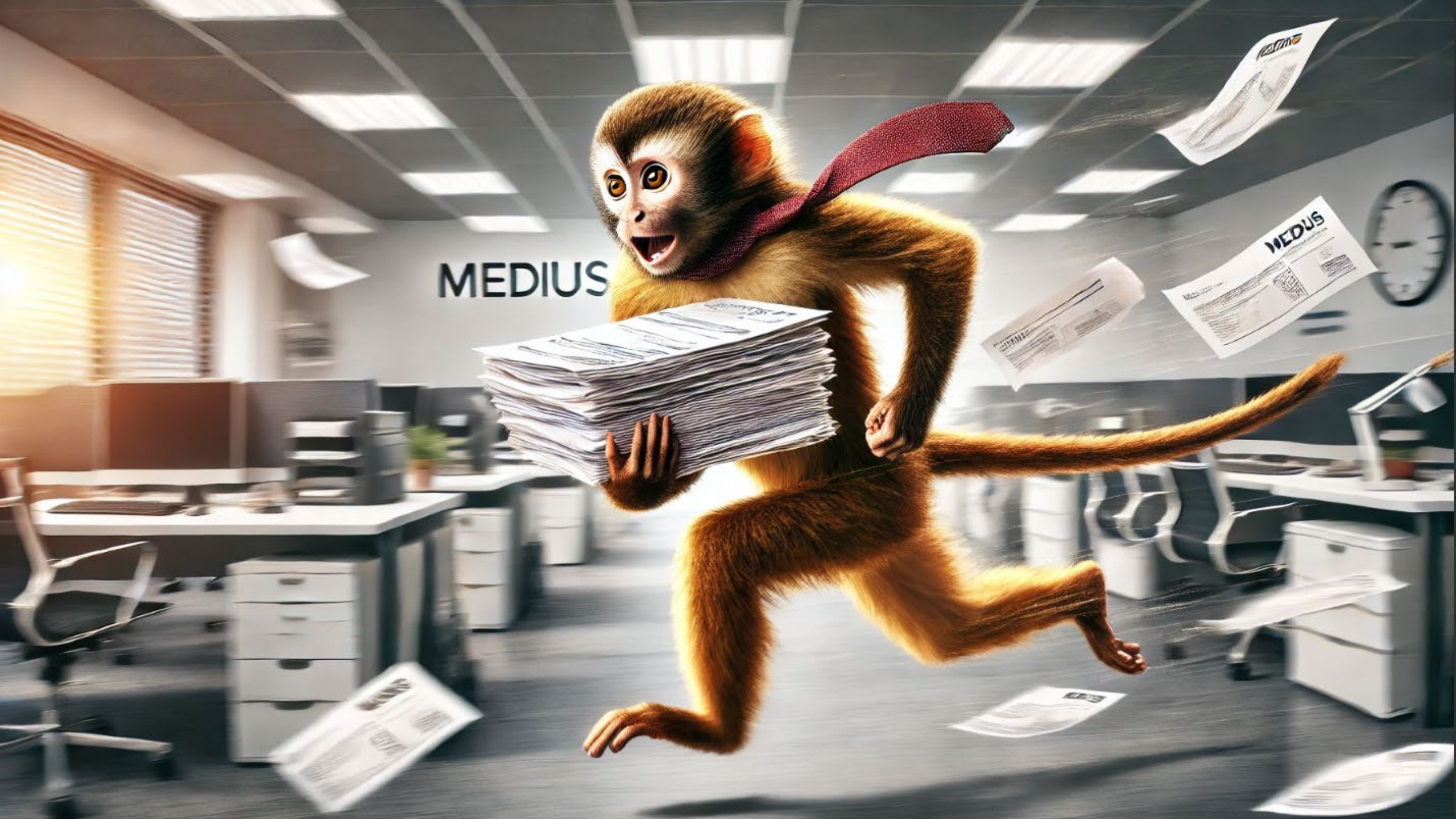
"Do I REALLY have to make the SAME correction on 15 invoices from the same supplier?"

Reprocessing in Capture

«Why can't I decide which additional charges that are relevant to OUR invoices?»

Custom charge header fields in Capture

2

Fields	Settings	Emails	* Field overridden Add fields

Header Fields ^

Label	Field mapping	Group	Visible
Invoice/Credit	NO_EXPORT	General information	☑
Invoice number	invoiceNumber	General information	☑
Payment reference	paymentReference	General information	☑
Reference	reference	General information	☐
Order number	orderIdentifier	General information	☑
Contract number	contractNumber	General information	☑
Bankgiro	PAYMENT_DETAILS	General information	☐
Plusgiro	PAYMENT_DETAILS	General information	☐
IBAN	PAYMENT_DETAILS	General information	☐
BBAN	PAYMENT_DETAILS	General information	☐
Charge A	CUSTOM_CHARGE	Amounts	☑
Charge B	CUSTOM_CHARGE	Amounts	☑
Charge C	CUSTOM_CHARGE	Amounts	☑
Referenced documents	REFERENCEDDOCUMENTS	General information	☐
Invoice date	invoiceDate	Dates	☑
Due date	dueDate	Dates	☑

Selecting line columns in Capture

3

«I want to filter invoices in Capture like I do with the other folders!»

4

Filtering incoming invoices

4

Invoice Label Tracking

5

Approve - Non-PO invoice 8744

Supplier	**AZ Mobile**	Net amount	**15,877.00 SEK**
Company	**Acme Inc.**	Tax	**0.00 SEK**

Invoice date	**11/17/2023**	Invoice no	**8744**
Due date	**12/20/2023**	Payment ref	

Coding   Invoice details   Comments 8   Contracts   File Attachments   **History**   Links

Show all   Main actions   Coding history   ☑ **Show previous document history**

Label added   **Friday, November 17, 2023 2:21 PM**
Label "To Investigate" was added by Patrik AP (patrik)

Coding   Friday, November 17, 2023 2:21 PM
Coding line added based on accounting template Mobile phone by SYSTEM
5010,-,-,-,- 10,973.90, 20
1112,-,-,-,- 200.00, 10+15

«What is an access key and why do I care?!»

6

Enhanced accessibility of access keys

6

«It would be great if I could see the tax indicators when I connect a PO invoice»

Tax information on purchase order lines

«I don't remember EXACTLY what the supplier name in our ERP is..»

8

Auto-complete in filters

8

«Why do I care about county code on the company?»

Country code on company

«Will my boss get this invoice after I approve it?»

Next approver in CoPilot

«I need to pay this invoice before the goods have arrived!»

Prepayments

«I don't want to have to choose between SmartFlow and coding templates!»

SmartFlow MERGE functionality

ROUND 2 AFTER THE BREAK @ 15:15

Carl Erik Finnstrøm

Customer Success Manager

carl.erik.finnstrom@medius.com