



Roadmap Insights

Prasit Sengupta



Unrivalled Touchless Invoice Processing

Boost detail matching

- **Item numbers on invoices and POs do not match, but we track the supplier's item numbers**
- Can you provide us a solution that does not require Medius to import all items?

Neither the item numbers nor the descriptions match

In this world of AI, can you figure out a way to connect the items anyway?

PO

SMIRSLTZR LIME 375ML CAN 24X01 3.5% 20

I


SMIRNOFF SELTZER LIME 3.5% CANS 375ML 24

I

HEINEKEN LGR 49.5L KEG

PO

HEINEKEN KEG



Use the power of purchase order information

- **I love automatic company and supplier identification in Medius, but...**
- Can't you also use the data on the Purchase Order?

Extracting line items can be challenging, often leading to manual matching of invoices

Can't you use lines on the Purchase Order to improve data extraction so that invoices don't get stuck in the workflow?

The logo for SmartFlow is a stylized, rounded shape composed of three overlapping layers. The top layer is a dark teal color, the middle layer is a dark charcoal grey, and the bottom layer is a vibrant red. The word "SmartFlow" is written in a white, sans-serif font across the top teal layer.

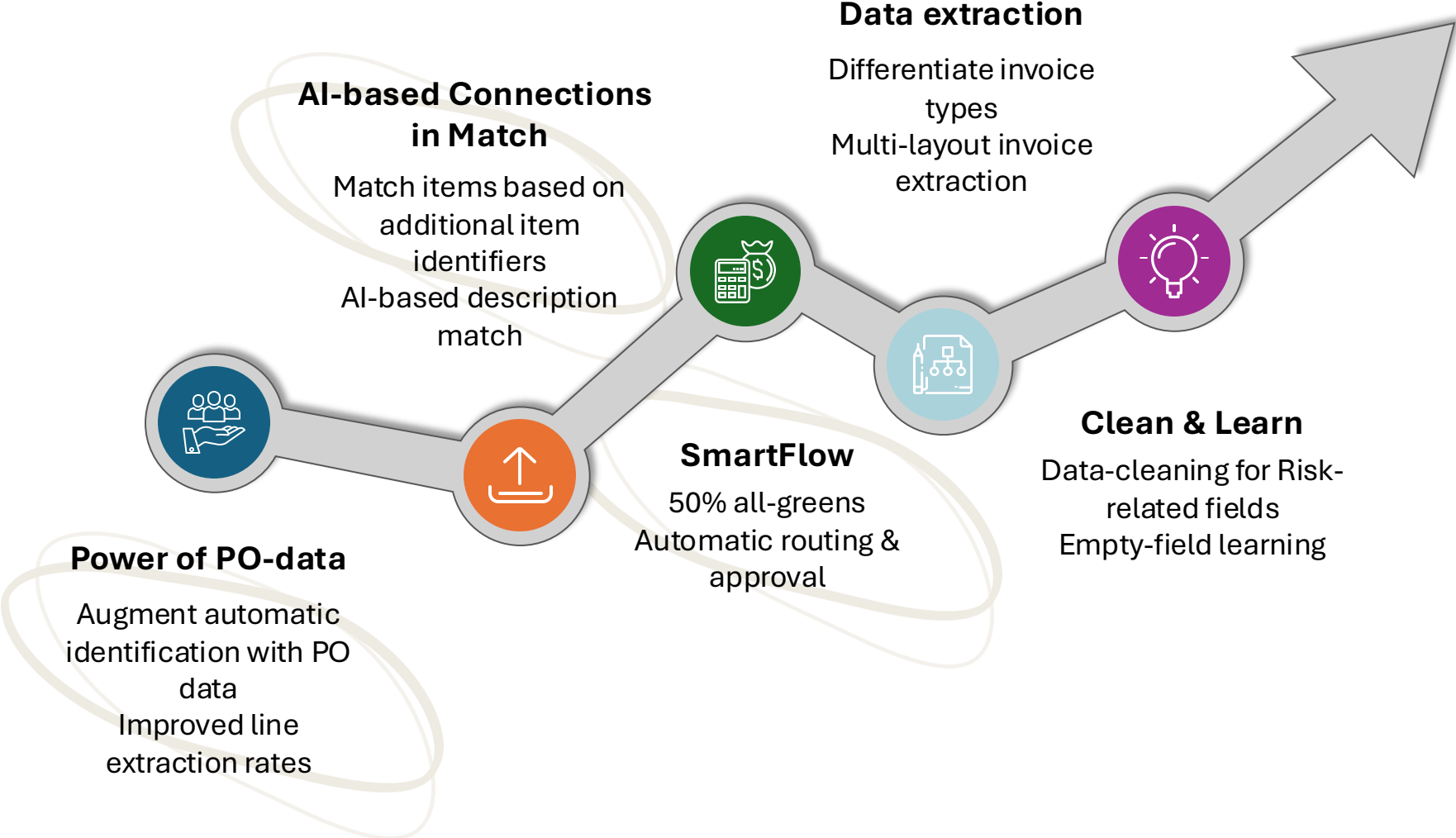
SmartFlow

- **We have begun to notice a growing number of all-green coding suggestions...**
- Can't you auto-route, and possibly auto-approve so that we don't need to process the invoice?

We utilize accounting templates, but there are still some coding fields that require manual input...

Can't you merge accounting templates with coding suggestions?

From Touchless to Autonomous



The background features several overlapping, semi-transparent shapes in shades of red and dark red. These shapes are roughly oval or elliptical, creating a layered, abstract effect. The text is centered horizontally and vertically within the composition.

Early identification & intervention



Early validation

- **We love the validations APA provides, but...**
- Can't you perform the same validations when an invoice is being verified?

We receive massive amounts of junk mail in the verification queue...

Why can't I bulk delete documents that I don't want to deal with?



Email tracking

- **We often have questions about invoices before we process them in the workflow**
- Why don't you provide a way of emailing the invoice from the verification step?

Suppliers complain that they haven't received emails sent from Medius

Doesn't Medius know/track whether the email was delivered or not?



Rejection Management

- **We have a lot of invoice rejections...**
- Can you provide a standard mechanism to report on the rejections, since some of these might occur more than once on the same invoice/line?

We always communicate rejections manually to our suppliers; this is not great from an auditing POV

With all the AI around us, can't Medius understand the nature of the rejection and keep track of the communication with the supplier?

Control your spend

Rejection Management

Controlled process to manage rejections and communicate the same to suppliers using reason codes and custom-templates



Email tracking

Ensure that your emails have been delivered to the receiver
Send emails from Verification interface



Validate early

Forget "Document Import" – validate when invoice is being Captured



Statement Reconciliation

Save time with automated supplier statement reconciliation that is designed to highlight discrepancies in closing balances and invoices

Approval of Invoicing Plan Item

Control fraud and track unauthorized changes to invoicing plans for Recurring invoices



Address extraction

Extract ship-from/to and other addresses and send them to the ERP



Multi-invoice PDFs

Split the PDF into multiple invoices at the click of a button

The background features several overlapping, semi-transparent shapes in various shades of red and dark red. These shapes are primarily oval and elongated, creating a layered, abstract effect. The text is centered horizontally and vertically within the composition.

Medius APA Copilot

Invoice is in a language I don't recognize –
can someone help me translate it?

All documentation is in English – I'd like to
get my questions answered in my language

Why have I received this invoice?

Is there anything odd or risky about this
invoice?

Who has approved this invoice before me,
and who's going to get the invoice after me?

I always get a lot of questions during month-
end; why can't people figure things out on
their own?

I can't figure out if I should approve or reject this invoice – can I get some help, please?

This is not my invoice. Who has previously approved invoices from this vendor so I can send it to the appropriate user?

How can I find out if I approved or rejected any invoices in the past from this vendor?

Invoice is not in balance. Any additional charges such as freight on the invoice that was missed during Capture?

This is a huge invoice - can someone summarize it?

Invoice is in a different currency. What's the amount to approve in EUR?

**Medius APA Copilot is your
personal assistant that
provides a conversational
interface to answer ALL these
questions (and more)!**

“ Copilot transforms your customers’ experience and relieves you of mundane but often stressful helpdesk duties ”

Filter Search Bulk operation

Non-PO invoice (6)

<input type="checkbox"/>	Labels	Indicators	Task	Company	Supplier	Invoice no	Amount	Currency	Due date	Inv
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Phoenix ...	PS-34758	94.99	USD	7/26/2024	6/2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Phoenix ...	PS-21457	647.81	USD	7/31/2024	7/1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Phoenix ...	PS-45712	418.97	USD	8/10/2024	7/1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Phoenix ...	PS-74517	329.00	USD	8/10/2024	7/1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Advance...	test2	2,121.00	USD	10/8/2021	10/
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Digital M...	730005	450.00	USD	1/28/2021	12/

Showing 6 out of 6 Show 10 more

Document approval (3)

<input type="checkbox"/>	Labels	Indicators	Task	Company	Type	Document num	Created by (Firs	Created by (Las
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Leave of Abs...	LA1	Amy	Schmitz
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Monthly report	MREP4	Administrator	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	Approve	Acme Inc.	Monthly report	MREP3	Amy	Schmitz

Showing 3 out of 3 Show 10 more

Approve - Non-PO invoice PS-34758

Medius Copilot

Supplier Id PH00001 Net amount 94.99 USD Invoice date 6/26/2024 Invoice no PS-34758
 Supplier Phoenix Supplies Inc. Tax 0.00 USD Due date 7/26/2024 Payment ref
 Company Acme Inc.

Coding Invoice image Invoice details Comments File Attachments History Links

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

Coded net: 94.99 Coded tax: 0.00 Coded total: 94.99 Coding balance (total): 0.00

<input type="checkbox"/>	#	Code string	Net	Tax group	Approver	Approve/Reject
<input type="checkbox"/>	1	6560 010 CC Proj Desc	94.99	OTAX	Penny Menendez (penny)	✓ X

Showing 1 to 1 of 1 lines, 0 Selected

0 comments

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

Save Comment

How can we help you?

Ask Medius Copilot for instant help with this document.

Who is approving this invoice? Tell me more about this supplier

How can I get this invoice expedited?

How long has this invoice been processed?

Save Send for review Control Center Send

Back Document 21 of 54

Add/remove labels

Nisses Smak.pdf

1 of 1 Automatic Zoom

Nisses Smak AB

Mottagare
Medius AB
Klarastrand
Stockholm

Fakturanummer 12345
Kundnummer 10
Er referens Anna
Vår referens Olof Göransson
Betalningsvillkor 30 dagar

FAKTURA

Fakturadatum 2019-11-15
Förfalldatum 2019-12-15
Dröjsmålsränta 8.0%
Plusgironr. 1234567-8
Bankgironr. 123-4567

Artikel	Beskrivning	Antal	Enhet	à pris	Belopp i kr
S1234	Havssalt	1	st	40.00 kr	40.00 kr
P3456	Svartpeppar	1	st	40.00 kr	40.00 kr
P5678	Rosepeppar	1	st	50.00 kr	50.00 kr
H4567	Acacia honung	1	st	87.00 kr	87.00 kr
BV76545	Balsamvinäger – lagrad	1	st	123.00 kr	123.00 kr
B2341	Surdegsgaugetter	10	st	56.00 kr	560.00 kr
B98765	Ostbricka exclusiv	5	st	245.00 kr	1 225.00 kr
CS6547	Catering service	4	h	850.00 kr	3 400.00 kr

Route - Non-PO invoice 123497

Supplier **Nisses Smakeri** Net amount **5,528.00 SEK** Invoice date **1/25/2021**
 Company **Acme AB** Tax **1,382.00 SEK** Due date **2/24/2021**

Coding Invoice details Comments 2 File Attachments History Links

+ Add Clone Remove Apply latest coding Templates

Coded net: 0.00 Coded tax: 0.00 Coded total: 0.00 Coding balance (total): 6,910.00

#	Code string
1	Konto Avd KST Proj Fritext

Showing 1 to 1 of 1 lines, 0 Selected

2 comments

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

Save Comment

Administrator (admin)
Patrik Ekonomi sure thing

Patrik Ekonomi (patrik)
Administrator Hi could you please check this out!

Medius Copilot Beta

Try out predefined prompts.
Prompts make it easy to get the info you need. Just ask, and your Copilot is here to assist!

Translate this invoice.

Here is the translation of the invoice into English:

Nisses Smak AB
Address: Storgatan 1
 123 45 Example City
Organization Number: 12345-6789
VAT Registration Number: SE1234567890
Telephone: 012-345678
Email: matthias@nissessmak.se
Website: www.nissessmak.se

Payment Details
Plusgiro Number: 1234567-8
Bankgiro Number: 123-4567
IBAN: SE123123123123

Invoice Number: 12345
Invoice Date: November 15, 2019
Customer Number: 10
Due Date: December 15, 2019
Reference from Customer: Anna
Reference from Us: Olof Göransson
Interest on Late Payment: 8.0%
Payment Terms: 30 days
Plusgiro Number: 1234567-8
Bankgiro Number: 123-4567

Items on the invoice:

Code	Description	Quantity	Unit Price	Unit Price
P3456	Black Pepper	1 unit	40.00 SEK	40.00 SEK
S1234	Sea Salt	1 unit	40.00 SEK	40.00 SEK
P5678	Pink Pepper	1 unit	50.00 SEK	50.00 SEK

Why have I received this invoice? What are my approval limits?

Ask me anything about this invoice or any work-related question

Medius Copilot can help you with this document Summarize Translate

Save

Non-PO invoice (6)

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<input type="checkbox"/>		+	Approve	Acme Inc.	Monthly report	MREP3	Amy	Schmitz

Showing 3 out of 3 [Show 10 more](#)

Approve - Non-PO invoice PS-34758 [Medius Copilot](#)

Supplier Id	PH00001	Net amount	94.99 USD	Invoice date	6/26/2024	Invoice no	PS-34758
Supplier	Phoenix Supplies Inc.	Tax	0.00 USD	Due date	7/26/2024	Payment ref	
Company	Acme Inc.						

Higher than average Medius Copilot has detected unusual invoice amount, this is considerably higher than the average cost of the last 5 invoices (\$23.01 USD). [Check more](#)

Coding Invoice image Invoice details Comments File Attachments History Links

[Add](#) [Clone](#) [Remove](#) [Approve my lines](#) [Apply latest coding](#) [Templates](#) [Filters](#) [More](#) [Retrieve approver](#)

Coded net: 94.99 Coded tax: 0.00 Coded total: 94.99 Coding balance (total): 0.00

<input type="checkbox"/>	#	Code string	Net	Tax group	Approver	Approve/Reject
<input type="checkbox"/>	1	6560 010 CC Proj Desc	94.99	OTAX	Penny Menendez (penny)	<input type="checkbox"/> <input checked="" type="checkbox"/>

Showing 1 to 1 of 1 lines, 0 Selected

0 comments

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

[Save Comment](#)

68 Ives Street
Murarrie Brisbane
Queensland 4172
Australia

PO Box 3319
Tingalpa DC Brisbane
Queensland 4173
Australia

T +61 (07) 3890 2633
F +61 (07) 3890 2644
E accounts.ar@navaska.com.au
W navaska.com.au



TAX INVOICE

BILL TO	LOCATIONS	INVOICE NUMBER	SRVCE92174
Transitional Optical Pty Ltd 130 Market Street Sydney NSW 2000	Brisbane	INVOICE DATE	05/09/2024
		PO NUMBER	N/A
		TOTAL DUE	\$3,278.00
		PAYMENT TERMS	30 Days

Services Performed Service Call 2408-0145 Equipment ID

[01/08/2024 9:15:00 AM Myles, J. - 0013] Arrived on site early Monday morning with the necessary tools and the pump sourced from Kirby. The air conditioning unit on the first level was leaking, the water seeping through the ceiling and pooling on the floor. The access hatches were already open, revealing the inner workings of the unit. The condensate tray was filled to the brim with water, a clear indication of the issue.

[01/08/2024 10:30:00 AM Myles, J. - 0013] The first task was to remove the excess water from the condensate tray. Using a high-powered vacuum, I began to suction the water, carefully ensuring not to damage any of the surrounding components. The water was murky, filled with dust and debris that had accumulated over time. This was a clear sign that the unit had not been serviced in a while, leading to the current issue.

[01/08/2024 11:45:00 AM Myles, J. - 0013] Once the water was removed, I inspected the chilled water valve. It was operating and responding well. However, the moisture sensor in the safety tray was still detecting water, indicating that the valve wasn't closing properly. This was causing the water to overflow and leak through the ceiling.

[01/08/2024 1:00:00 PM Myles, J. - 0013] The solution was to install a pump in the safety tray. This would help to remove any excess water that may pool, preventing any future leaks. The pump from Kirby was perfect for the job, compact yet powerful. I began the installation process as per instructions.

[01/08/2024 2:30:00 PM Myles, J. - 0013] The pump was successfully installed and tested. It was working efficiently, removing the excess water from the safety tray. The moisture sensor was no longer detecting water, indicating that the valve was now closing properly.

[01/08/2024 4:30:00 PM Myles, J. - 0013] The air conditioning unit was now functioning properly, with no signs of any leaks. The pump was a necessary addition, ensuring that any excess water would be removed, preventing any future leaks. I informed the supervisor of the successful repair and maintenance work, leaving an extra pump on site as requested.

[01/08/2024 5:00:00 PM Myles, J. - 0013] This issue was a clear reminder of the importance of regular maintenance and servicing of air conditioning units. Without regular checks, minor issues can escalate into major problems, leading to leaks and potential damage to the property. Regular maintenance can help to identify and fix these issues before they become problematic, ensuring the longevity and efficiency of the unit.

[02/08/2024 11:00:00 AM Kerry, R. - 0009] Checking the water overflow issue on the Stanley north fan coil unit. Reached out to my colleague, Jim M., for assistance. We began looking at the schematic as built, but the copies did not represent the actual wiring. We had to trace the wiring to the micro 3000 wall controller and identify digital input 3.

[02/08/2024 12:15:00 PM Kerry, R. - 0009] We found that the program was not assigned and proceeded to program parameter 19 to the flow sensor. We then simulated and checked the operation of the chill water valve and its function upon detection. The valve operated correctly and shut down properly.

[02/08/2024 1:30:00 PM Kerry, R. - 0009] We then checked the location and operation of the dryer sensor in the safety tray and checked the continuity on the wiring. We found that the signal was not being received at the controller, therefore not shutting down the chill water valve. This was a wiring issue that would require an additional visit to trace and renew the cabling.

[02/08/2024 2:45:00 PM Kerry, R. - 0009] Despite the wiring issue, we noted that the safety tray was dry and the drain issues had been resolved. We set the stat valve from 3.7 to 2.4 turns as per the design.

[02/08/2024 11:00:00 AM Jim, M. - 0021] Assisting Kerry R. with the water overflow issue. We reopened the stat valve to the correct position like the other units and changed the set point to 23 degrees. We cleaned up the ceiling space, cleaned the water puddles, and reconnected the piping which had fallen down to stop condensation on the pipes.

[02/08/2024 2:50:00 PM Jim, M. - 0021] We opened all supply air grills to allow maximum airflow. Everything was in order. We've informed our supervisor.

Detail of Charges

Item Number / Date	Description	QTY	Unit Price	Line Total
MATERIAL				
	Spare parts	3.00	\$95.00	\$285.00
	Consumables	5.00	\$30.00	\$150.00
OTHER (TRAVEL)				
	SITE ATTENDANCE FEE	4.00	\$70.00	\$280.00

This is a payment claim made under the "Building Construction Industry Act 2004 (Qld)" Navaska electrical licence number 72470. This certifies that the Electrical equipment, to the extent it is affected by the electrical work, is electrically sound.

NAVASKA PTY LTD TRADING AS NAVASKA | ACN 137 996 555 | ABN 53 137 996 555 | ARC AL25833

summarise all services provided, in a list

1. Found safety tray full of water, tracked insulation, confirmed valve isn't stuck.
2. Added pump to safety tray.
3. Investigated unit leaking; cleaned and serviced insides.
4. Adjusted setpoints and controls, ventilation.
5. Inspected wiring, insulation.
6. Addressed overflow and water buildup issues.
7. Reinstalled insulation.
8. Investigated electrical controller issues.
9. Checked for schematic accuracy and wiring issues.
10. Ensured proper valve and vent functioning.
11. Monitored and updated system settings.



13/09/2024 19:51

AI generated content may be incorrect

I have ordered a new keyboard. This invoice is for computer equipment. Which account should I choose for this?

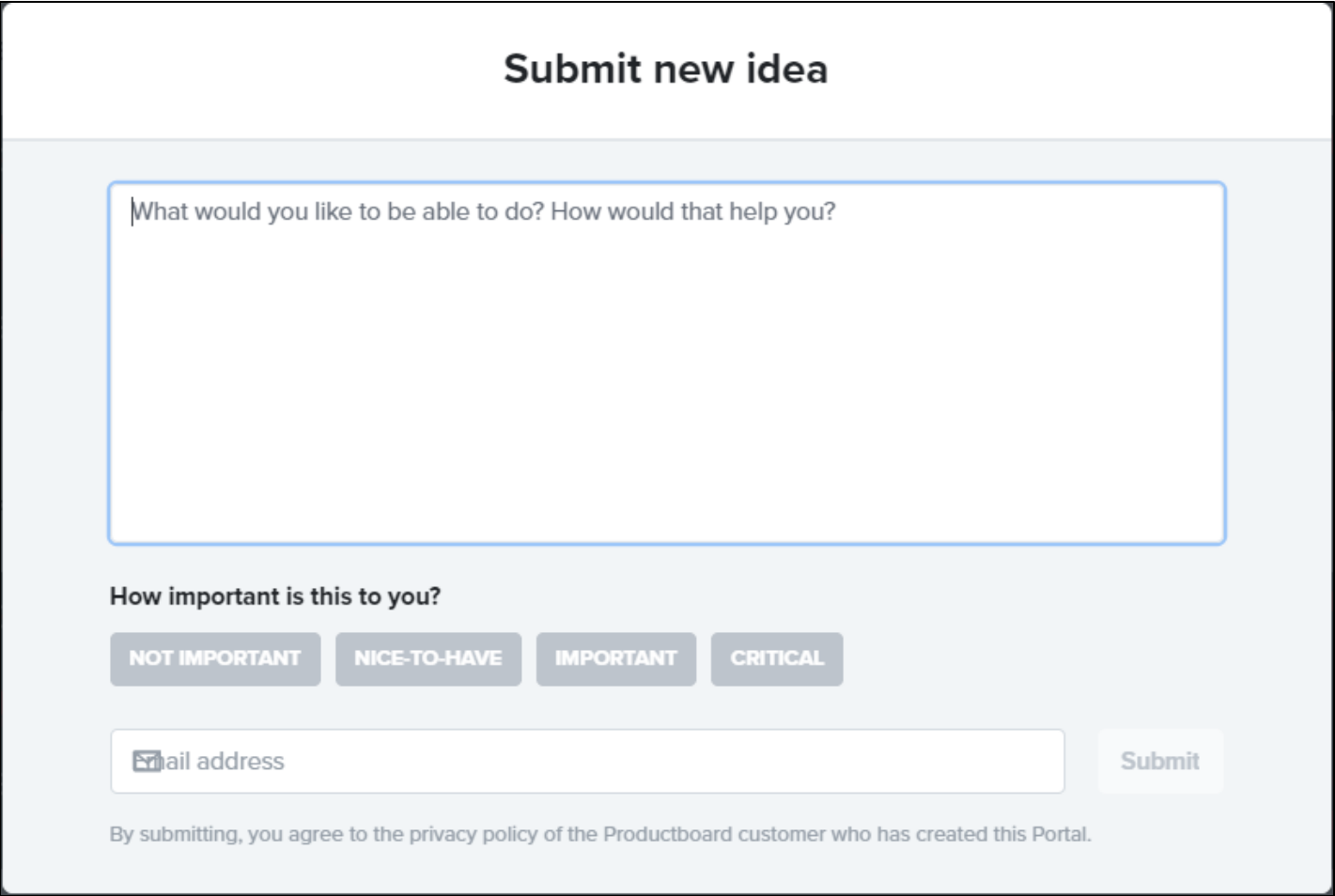
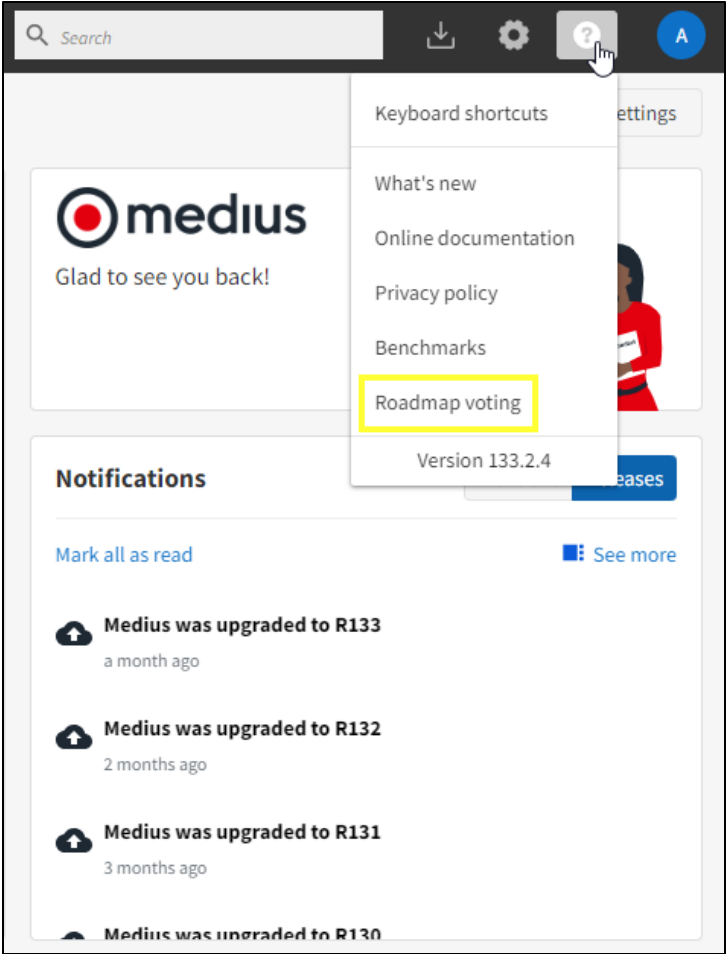
What is the bankgiro in the invoice?

Are there other invoices associated with this PO?

What is the average monthly invoice amount for this supplier?

How do I bulk approve?

OUR NEW PRODUCT BOARD!



Thank you.

