



Medius Life Hacks #2

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Pre Approved Invoices

1

AP Automation

HOME INBOX DASHBOARD REPORTS CREATE

Search

Pre-approved Configuration

+ Add

Name	Company	Status	Document type
Low value and dim1 set	Acme	Active	Non-PO invoice
Costs for office supplies	Acme 2	Active	Non-PO invoice

1 - 2 of 2 items

ConfigurationWithTotalAmount

Active Deactivate

Company
Acme 2

Document type
Non-PO invoice

Suppliers
Include:
AZ Office Supplies

Rules
Documents which fulfill the criteria added here will skip the approval step.

+ Add rule

Total amount ≤ 100

GL Office supplies = 5410

Delete Edit

Remove empty coding lines

2

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

Add/remove labels

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	Dep	CC	Proj	Desc	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

Wards Catering Services

1200 Spring Valley Road
Pottstown, PA 19464
Phone 800 679 1223
Fax 610 555 3767



INVOICE

INVOICE: 70912
DATE: 1/1/2021

COMMENTS OR SPECIAL INSTRUCTIONS:

Item #	Description	Quantity	Unit Price	Extended Amount
1	Deluxe Sandwich Platter	2	\$34.18	\$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.



Same as Cost Exception types

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Search

Add/remove labels

Polartek.pdf

E-mail



Faktura - 98862

Ordernummer	Kundkod	Sida
2021-03-08	123456	1 / 1
Orderdatum		Fakturadatum
2021-03-08		2021-03-07
Yrskategori		Erretans
Andreas		Ingvar

Ertsansreg.nr	Erts ordnr
	MF-3005

Leveransadress	Fakturaadress
MEDIUS AB	MEDIUS AB
Klarabergsviadukten 90	Klarabergsviadukten 90
111 64 STOCKHOLM	111 64 STOCKHOLM
Sverige	Sverige

Leveransvillkor	Betalningsvillkor
Mottagarfax	30 dagar netto
Leveranssätt	Förfallodatum 2021-04-08
DHL	
Följesedebarr	Gömslänkning
35789	MF-190018

Pos	Artikelnr	Benämning	Lever	Antal	å-pris	%	Belopp
1	11539	Washer L-40rim		030.00 st	10.25		10 950.00
1	90999	Ställkostnad/Setup Cost		1.00 st	086.00		086.00
		Erts annr: 534					
		Rtnrnr: 534					
2	11063	Shakt till jobb		130.00 st	32.20		3 220.00
2	90999	Ställkostnad/Setup Cost		1.00 st	730.00		730.00
		Erts ordnr: 138-02					
		Rtnrnr: 138-02					
3		Enkeltloge		1.00 st	116.00		116.00
		Hävenings- och anbilagskostnader					
		Beaktningsskatt 25% (SEK)					16 961.00
		Summa rader exkl. moms					15 961.00
		Mervärdesskatt: 25% (SEK)					3 987.75
		Orosvurdering					4.25
		Summa att betala (SEK)					19 953.00

Anmärkingar ej gjorda inom 8 dagar godkännes ej

Godkänd för F-skatt

Post control - Order based invoice 98662

Supplier	Polartek	Net amount	15,951.00 SEK	Invoice date	3/8/2021	Invoice no	98662
Company	MediusFlow SWE	Tax	3,987.75 SEK	Due date	4/7/2021	Payment ref	

Invoice details | Coding | Comments | File Attachments | History | Links 3

+ Add | Clone | Remove | Filters | More

Coded net: 15,836.00 Coded tax: 3,542.50 Coded gross: 19,378.50 Coding balance (gross): 560.50

Invoice line	#	number	Codestring	Net	Taxgroup
<input type="checkbox"/>	1	1	6090 -Avt -AST -Proj -Fritext	10,950.00	V25
<input type="checkbox"/>	2	3	6090 -Avt -AST -Proj -Fritext	3,220.00	V25
<input type="checkbox"/>	3	2	6090 -Avt -AST -Proj -Fritext	936.00	V0
<input type="checkbox"/>	4	4	6090 -Avt -AST -Proj -Fritext	730.00	V0

Showing 1 to 4 of 4 lines, 0 Selected

0 comments

Write a comment (use @name to mention user)

Save Comment

Save | Send for review | Control Center | Return | Invalide | Final approval

Same as Cost Exception types

Document type
Order based invoice

Name: Freight
Item number: Freight
Description:
Active: Yes No

Amount limit: 25.00
Unit price limit:
Percentage limit:
Distribute proportional: Yes No

Coding: SaC
Tax indicator 1: SaC
Tax indicator 2: SaC

Automatic Coding of rounding

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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

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

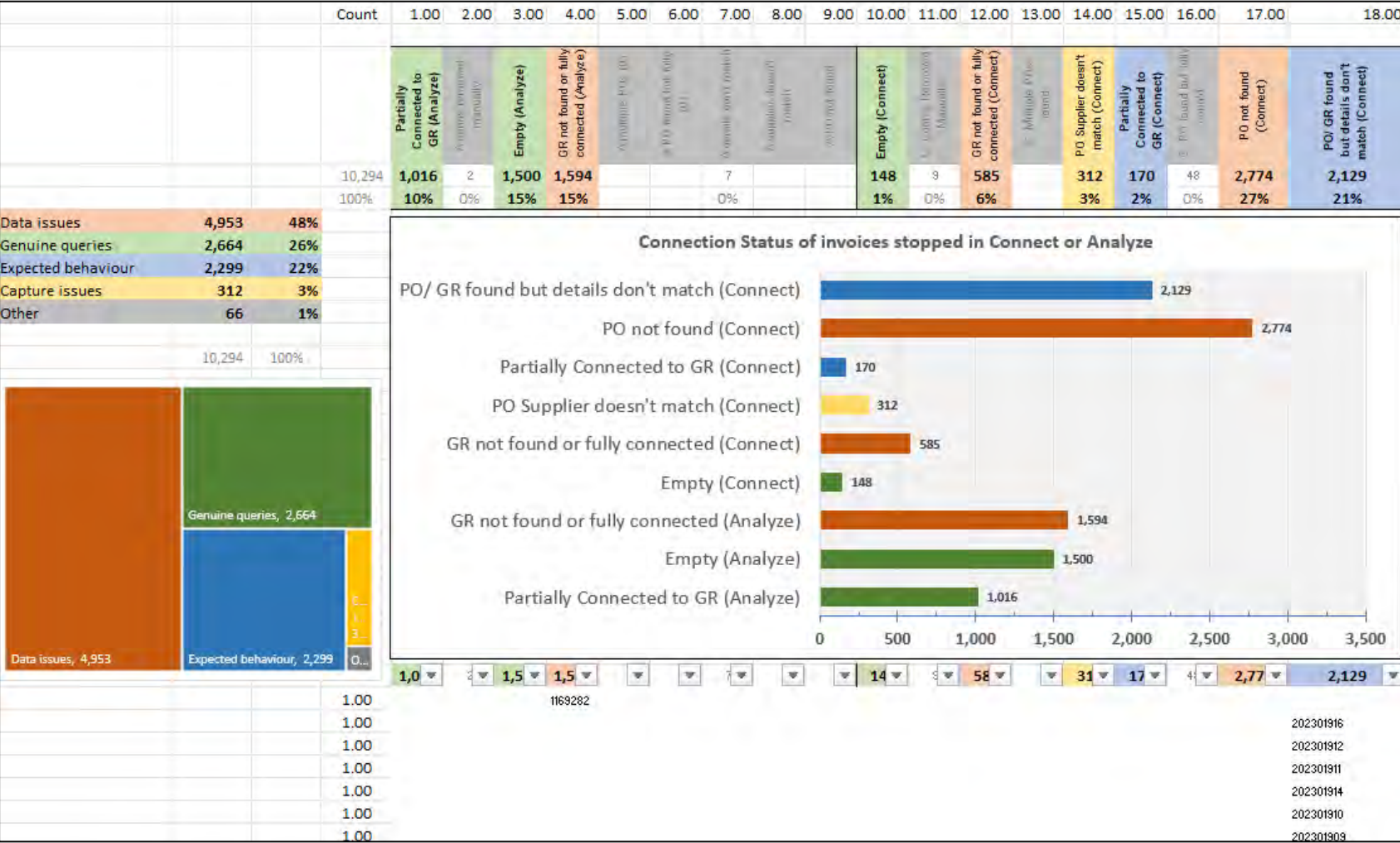
Best.datum: 2021-08-09, Ordernummer: MF-23456, Fakturanummer: 56873581, Utskriftsdatum: 2021-08-09, Bet.kundnummer: 11164, Kundnummer: 11164

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

Er referens	Leveranssätt	Artägning	Leveransvillkor
Ingot	Bil		Fraktfritt
Godsnamn	Betalningsvillkor	Kund ID	Objektnummer

Poz	Artikelnummer	Ordernummer	Leveranskvantitet	Enhet	Grundpris	Rabatt/Ölslag	Summa, netto
1	278924	MF-2881	1	FRP	219.00	NETTO	219.00
	TIGERSÄGGLAD LENOX 118R 300MM-18T BIM 5-PACK						
2	8110150	MF-2881	1	FRP	1085.00	-	1085.00
	TIGERSÄGGLAD LENOX 818R 200MM-18T BIM 5-PACK						
3	103859	MF-2881	1	ST	448.00	-	448.00
	GÅNGTÄPP DORMER E547 G 1/4 NR2						
4	103961	MF-2881	1	ST	664.00	-	664.00
	GÅNGTÄPP DORMER E547 G 3/8 NR2						
5	130494	MF-2881	1	ST	939.00	-	939.00
	GÅNGTÄPP DORMER E547 G 1/2 NR2						
7	103755	MF-2881	1	ST	201.00	-	201.00
	GÅNGTÄPP DORMER E500 N6 NR3						
9	103762	MF-2882	1	STK	275.00	-	275.00
	GÅNGTÄPP DORMER E500 M10 NR2						
10	103767	MF-2882	1	ST	376.00	-	376.00
	GÅNGTÄPP DORMER E500 M12 NR3						
11	247549	MF-2882	5	ST	130.00	-	650.00
	SPIRALBORR, DORMER AD02						

Connection and Deviation Reports





S2C – Advanced Contract Search

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Purchase requisition | Payment request | Document approval | Payment batches

- Analytics
- AP Automation
- Connect
- Contract Management**
- Pay
- Procurement
- Sourcing
- Supplier Portal

Category	Count
MF Purchase Order	2
PO invoice	17
Non-PO invoice	17
Captured document	28
Total	64

medius
Glad to see you back!

Notifications | Mentions | Releases

Mark all as read | See more

Patrik Ekonomi mentioned you on 123497
2 years ago

Quick question

Expensya
— JOINS —
medius

Non-PO automatic routing (last 30 days) | Percentage | Value

0%

Invoice processing time (last 30 days)

No data to show.

User Guide

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Procurement - Free Text Templates



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

Search:

Settings

Navigation: Purchase requisition | Payment request | Document approval | Payment batches

Left Sidebar: Analytics, AP Automation, Connect, Contract Management, Pay, **Procurement**, Sourcing, Supplier Onboarding, Supplier Portal

Dashboard Metrics:

- Process: 5
- Total amount: 175,968.50 USD

[Go to Inbox](#)

Quick question: Expensya - JOINS - medius

Non-PO automatic routing (last 30 days): Percentage: Value, 0%

Invoice processing time (last 30 days): No data to show.

Notifications: Mentions | Releases
Mark all as read | See more
Patrik Ekonomi mentioned you on 123497
2 years ago

User Guide: Do you want to know more about the product? [Go to Success Portal](#)



Three super quick ones you won't regret!

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medius Success Portal

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Documentation for Medius Buy and Procurement.
 - [Procurement](#)
- Invoice to Pay**
Documentation for Medius Capture, AP Automation and Pay.
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 - [AP Automation](#)
 - [Pay](#)
- Suite Applications**
Documentation for Medius suite applications.
 - [Supplier Portal](#)
 - [Supplier Onboarding](#)
 - [Analytics](#)
- MediusGo**
Documentation for MediusGo.
 - [MediusGo](#)
 - [MediusGo ERP Connectors](#)
- Integration API**
Resources for developers who want to integrate with Medius Spend Management.
 - [Integration API](#)
- ERP Connectors**
Resources about ERP connectors fully managed by Medius.
- FAQ**
Solutions to most common problems, and configuration suggestions and ideas.
- Release Notes**
Information about newest additions to Medius Spend Management, and the new features we introduce.

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If you can live with the Marketing Material there is also sooo much more you get access to!

The screenshot shows a LinkedIn feed for the Medius company page. At the top, there are navigation tabs for 'All', 'Images', 'Videos', 'Articles', 'Documents', and 'Ads'. A post from Medius (11,159 followers, 5 days old) is visible, with the text: "B2B payments fraud is an increasing concern for businesses, with over 50% targeted by fraudulent activity in the last year. Thankfully, AP Automation can help to stop and eliminate this threat. ...see more". Below the post is a red document titled "5 ways AP Automation can eliminate B2B payments fraud" featuring a man with glasses. To the left, a video player is shown for "Accounts Deceivable" with the episode "Episode One: Devil's In the Email" (Dec 2022, 21 min 15 sec). Below the video is another document titled "The Financial Professional Census" (Medius, Q3 2022) with the text: "A global picture of the challenges facing finance teams: rising fraud, retaining talent, late supplier payments and strained relationships with procurement." The Medius logo is visible in the bottom left corner of the document.

Three super quick ones you won't regret!

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You can buy Medius on **Microsoft Marketplace**

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You will learn more at the **final session at the end of the conference**


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