

Inbox relief, team reengaged

How Samuel, Son & Co. transformed
supplier communications with Medius

The Company

Samuel, Son & Co. is one of North America's largest processors and distributors of metal and industrial products, with over 100 facilities across Canada, the U.S., and Mexico. For over 170 years, the company has grown through a strong focus on operational excellence and customer relationships.

The finance team has played a key role in the company's growth. However, as the business expanded, pressure on accounts payable increased, and managing supplier communications became cumbersome, disrupting operations.

The AP inbox painted a clear picture of the challenges: outdated processes, overwhelmed employees, and a daily flood of hundreds of supplier emails.

The challenge

100+ emails a day and a team stretched thin

Every day, the AP inbox received more than 100 emails from vendors requesting payment status or invoice confirmation. Each email required logging into systems, validating data, and crafting replies—work that was tedious, time-consuming, and draining team morale.

“Nobody liked doing it. It’s tedious, thankless work just looking up invoice statuses or chasing down issues,” explained Dana Frape, Manager of Financial Shared Services.

The team attempted to rotate the responsibility among staff, assign it to a single person, and even pilot a vendor portal in 2020. None of it stuck. Workloads remained unbalanced, supplier responses were often rushed or incomplete, and inquiries frequently escalated to management.



We weren't giving vendors what they needed. And people were just trying to get through the inbox to move on with their day. We knew there had to be a better way.

Dana Frape, Manager of Financial Shared Services

The solution

AI-powered responses with Medius Supplier Conversations

That breakthrough came during a Medius Elevate session, where Dana's team learned about **Medius Supplier Conversations**, an AI-driven tool that responds to vendor emails in real-time by pulling data directly from their AP system.

Initially, there was internal resistance, especially from IT, due to security concerns. But with support from Medius, **Dana and her team started with a controlled pilot and a clear focus: test smart, go live carefully, and don't expect magic overnight.**

Dana personally audited every response before it reached a supplier. Early on, she caught small issues, like the AI confusing account numbers with invoice numbers or sending duplicate replies. But what impressed her most was **the rapid response from the Medius product team**, who implemented fixes within days so that the AI engine could learn the right way.

More importantly, the process revealed internal inefficiencies. Many suppliers were sending invoices to the wrong inbox, which the AI couldn't respond to. The fix wasn't to reprogram the bot. It was to address the root cause. The team engaged the business to help vendors route inquiries to the correct address, making the AI more effective without unnecessary complexity.

The logo for Samuel, featuring a stylized red flame icon above the word "SAMUEL" in bold black capital letters, with the year "1855" in smaller text to the right.

SAMUEL
1855

We treated it like any other transformation. It takes time to prepare your internal processes and be realistic about what needs to change to get the most value out of it.

Dana Frape, Manager of Financial Shared Services

The results

Real-time responses, reinvigorated team

The impact was immediate and far exceeded expectations.



Inbox volume dropped dramatically, reducing a multi-hour task to under 30 minutes a day.



Response times improved, with vendors receiving answers in minutes instead of days.



Escalations declined, thanks to clear, consistent replies.



Inbox clutter was gone with AI handling basic invoice checks so that the AP team could focus on strategic issues.



AP team morale rose as staff reconnected with more strategic and rewarding aspects of their roles.



I thought the biggest benefit would be time savings, but really, it was the team engagement. They were excited, energized, and curious in a way we don't always see in AP.

Dana Frape, Manager of Financial Shared Services

Looking ahead

A spark for broader innovation

Supplier Conversations didn't just fix a problem. **It sparked a broader conversation about AI and digital transformation.** While Samuel, Son & Co. typically focuses technology investments on the manufacturing floor, Supplier Conversations showed that support functions like finance can also benefit from AI. The AP team worked with marketing to showcase their success internally as a continuous improvement (CI) story and built on the momentum by piloting Medius Statement Reconciliation next which requires Medius Supplier Conversations.

It also sparked cultural change. Finance team members began to see automation not as a threat, but as a tool to empower them.



We're encouraging people to use their brains, focus on what a machine can't do.

Dana Frape, Manager of Financial Shared Services

Final thoughts

Trust the tech, empower your people

Dana's advice for other finance teams is simple: don't overcomplicate things, be realistic, and trust the technology.

Instead of focusing on lengthy QA or preloading contact data, test live, fix root causes, and let the AI learn. One of the smartest time-savers was skipping manual contact uploads. The AI now automatically recognizes new vendors and adds them with a single click.

"Trust the technology, and let it do its job, so your people can do theirs."



Our team was excited, energized, and curious in a way we don't always see in AP. It sparked something in them, and **now we're all on the same page**, looking forward to what's next.

Dana Frape, Manager of Financial Shared Services

About **Medius**

Medius AP management software replaces the work and worry of invoices with AI and automation. Medius goes far beyond basic automation by using artificial intelligence to do the work – so invoices get coded, approved and paid, and your business can trust your budgets and forecasts without the fear of potential fraud. And you won't have to worry about implementation and ongoing administration costs, because you'll start seeing the value immediately and the innovation won't stop. To learn more, visit medius.com.



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