

# From patchwork processes to streamlined finance operations

How Charterhouse Holdings fixed its AP and expense headaches at the same time.

# The company

Founded in 1970 and based in Derby, Charterhouse Holdings has spent over five decades building a reputation in garment manufacturing and personalization. Today it operates across the UK and Europe through four brands - Kustom Kit, Xpres, Vanilla, and Adkins - serving customers directly and through a network of authorized distributors.

The orders Charterhouse handles aren't simple. Take a polo shirt: one style, one color, sizes from XS to 6XL. That's already ten lines. Their main polo comes in 30 colors.

**A single order can run to hundreds of lines, split across multiple deliveries, in multiple currencies, under varying**

**supplier terms.** Behind all of it sits a finance function running on Microsoft Dynamics 365 Finance & Operations, but as the business grew, the team needed more than their current setup could offer.

Industry	Garment manufacturing & personalization
ERP	Microsoft Dynamics 365 F&O
Annual invoices	10,000+
Brands	Kustom Kit, Xpres, Vanilla, Adkins
Solutions	Medius AP Automation + Expense Management
Implementation Partner	Columbus

# The challenge

## Two problems quietly getting worse

When Charterhouse implemented D365FO in 2020, they adopted a third-party AP add-on. It worked until it didn't. Microsoft updates D365FO twice a year, and the AP software kept falling behind. Each update triggered a new round of compatibility testing, workarounds, and patched fixes. A core finance process of ordering, receiving, authorizing, and paying had quietly become fragile.

The second problem had been there even longer. There was no dedicated expense system. Just spreadsheets, physical receipts, and a monthly process that consumed hours across the business and produced only the most basic reporting in return.

### AP challenges

- Ongoing D365FO compatibility issues
- Repeated testing cycles after every update
- Existing solution struggling to scale

### Expense challenges

- Paper receipts and manual spreadsheets
- Manual approvals and processing
- Time-consuming monthly submissions

### Operational impact

- Hours lost to low-value admin
- Delays across finance workflows
- Growing pressure on finance teams



We've got directors, senior managers, field salespeople, and engineers, all spending up to a couple of hours a month hunting down receipts, putting them in envelopes, filling in spreadsheets, and sending them in. We were spending a disproportionate amount of time on expenses that didn't justify the effort.

**Mark Bartlett, Chief Finance & I.T. Officer at Charterhouse Holdings.**

# The solution

## One decision, two fixes with Medius

Charterhouse already knew of Medius from previous engagements. After attending a webinar hosted by Columbus and Medius, the case was clear. Medius AP Automation was built with D365FO compatibility at its core, which meant no more upgrade anxiety. And it came with an integrated expense management solution that would entirely replace the spreadsheet-and-envelope process.

As Mark described it, "The technical features were a good fit for our needs, alongside the credibility of being a strong fit for D365FO. Plus, Medius included the expense management solution that would fix another long-term problem CH needed to address. A double win."

### Reliable D365FO integration

Built to support ongoing ERP upgrades without disruption.

### Scalable automation

Supports growing transaction volumes and workflows.

### AP + Expense in one platform

Connected finance operations in a single solution.

### Future-ready capabilities

AI-driven functionality and long-term scalability.

### Trusted implementation support

Strong collaboration between Charterhouse, Columbus, and Medius.

## A collaborative implementation with Columbus

Columbus managed the implementation over four months, with a dedicated Medius project manager leading the technical work and a smooth go-live. What made it land well, according to Mark, wasn't just the process. It was the attitude on both sides.

"For any implementation to succeed, there has to be harmony. The client needs to know what's required and be open to change, while consultants must listen and show what's possible rather than just follow a fixed approach. Our project worked because both sides did exactly that."

**Mark Bartlett, Chief Finance & I.T. Officer**

# The results

## **10-15 minutes**

Month-end expense process time (previously hours)

## **100% paperless**

Expense management process

## **Zero upgrade friction**

Smooth D365FO compatibility

## **Same headcount**

Handling significantly more workflows

## **Faster processes. Better experiences. Scalable growth.**

The AP side has already cleared its first D365FO upgrade cycle since go-live, a moment that used to cause the most stress. It passed without a conversation. On the expense side, what used to consume hours of chasing, filing, and processing each month now takes minutes. The reporting is better, too: digital receipts mean audit trails that actually hold up.

But the result Mark comes back to most isn't on a dashboard.

“Employees don't dread doing their expenses at the end of the month anymore. They can get it done quickly and get back to more productive activities. It's an emotional win as well as an efficiency one.”

**Mark Bartlett, Chief Finance & I.T. Officer**

# Looking ahead

## Positioned for scalable growth

With a stable AP foundation and a paperless expense process in place, Charterhouse is well-positioned for what comes next. As transaction volumes grow, the team expects to lean further into Medius's AI-based processing capabilities, functionality that wasn't fully available before but is now within reach.

"We now have an AP solution that's faster and more reliable," said Mark. "We expect significant long-term benefits because of its enhanced functionality and increasing levels of AI-based intelligence for processing."

## Mark's advice for other finance leaders:



### Focus on long-term scalability

Choose solutions that evolve alongside your ERP.



### Modernize the full process

Don't just digitize old workflows. Improve them.



### Prioritize employee experience

Small process improvements can have a major impact on morale.



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