



Medius Procurement

For Rapid Application Deliveries

Product: Medius Procurement
Version: August 2026



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Introduction

Welcome to this short Medius Procurement overview for Rapid Application Deliveries.

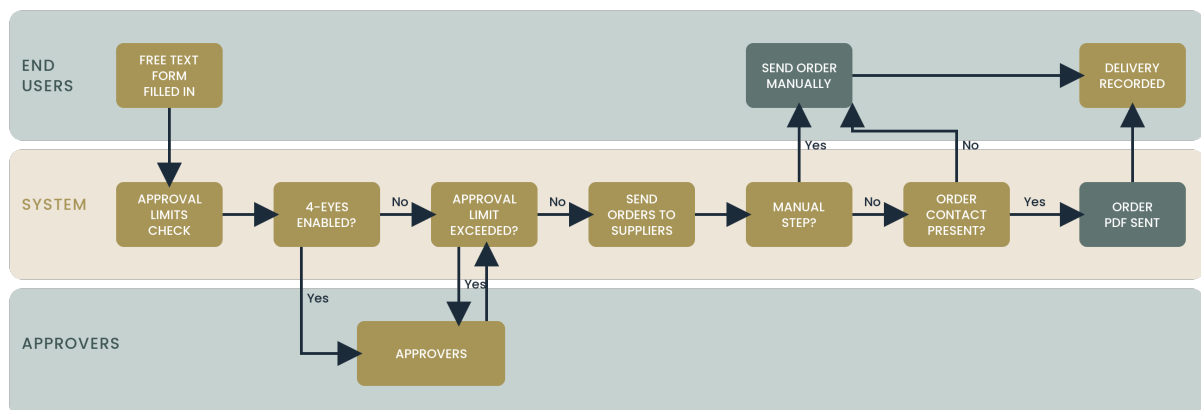
In this brief overview, Medius will demonstrate the capabilities of the Medius Procurement platform, some design decisions that have been made, and the simplicity of purchasing that is at the forefront of rapid delivery implementations.

Medius Procurement sits in the same ecosystem as the majority of Medius modules — such as Payments, Supplier Management, Expense Management, and of course Invoicing. It's an integral part of the suite, accessed using roles and permissions assigned to users.

Rapid Delivery for Procurement has been designed so that business users — known as requisitioners — are able to quickly and without complication raise a purchase request and submit it for approval.

Process Overview

The diagram below summarizes the simplified end-to-end Rapid Delivery procurement flow — from a requisitioner completing a free text form, through the system approval limit checks and the approvals process, to the order being sent to the supplier and the delivery being recorded.



Raising a Requisition

Purchase requests are created using the Request menu. From here, the requisitioner begins building a purchasing cart, also known as a requisition basket.

Rapid Delivery favours simplicity over complexity, and with that in mind the starting point for requisitioners will always be free text transactions. In free text, the person requesting to buy something is simply asked to type a description of their purchase.

The user enters a description of what they're trying to purchase, selects the purchasing category it belongs to, and chooses a supplier. Categories are something customers are expected to define and provide to Medius — either during onboarding or as part of the implementation. A template and guidance are provided in the Rapid Delivery onboarding process.

If Medius is configured to store supplier contracts (via the Supplier contract module), a contract can be selected relating to the chosen supplier. The user then selects a unit of measure, optionally enters a product code, and the currency is defaulted based on the supplier selected. The requisitioner then enters the price per unit and the quantity – for example, five monitors at \$279 each.

Any additional information for the supplier can be entered directly against the purchase line. The user then adds the content to the cart that will ultimately be submitted for approval.

At checkout, the requisitioner is presented with the invoicing address that will be printed on the order sent to the supplier, as well as the delivery address. Maintenance of both is the customer's responsibility, and training is provided on how to create and manage these addresses.

The requisitioner must also provide an expected delivery date. This is passed on to the supplier as the earliest date the delivery should take place.

The person raising the requisition is automatically named as the reference contact on the order – so when suppliers receive the purchase order, their name appears as the point of contact. This reference can also be used at the point of invoicing for any queries. That same person is also automatically named as the one responsible for confirming delivery. Both fields can be modified – for example, if the purchase is being raised on behalf of someone else.

An important part of the requisitioning process is financial coding. Each transaction line must be coded, meaning financial dimensions are applied. This is similar to how non-PO invoices are coded before being passed to approvers. Coding the requisition upfront helps Accounts Payable downstream – they won't need to re-code the invoice when the supplier sends it.

Coding can be applied automatically, driven by the selected category. Customers provide what's referred to as pre-coding, and when a category is selected that coding is applied automatically.

A quick note on budgeting: customers purchasing Medius Procurement can also utilize built-in budgeting capabilities. This is available as Value Added item and does require configuration, primarily around providing budget data. When Value added item is purchased, there will be dedicated training covering budgets – including how data can be loaded as a one-off by Medius, or sent via REST API.

Medius Procurement does not require tax to be selected at the point of purchase – tax is applied at the point of invoice. However, customers who wish to indicate tax at the requisition stage are able to do so. Worth noting that tax does not get added to the value of the purchase order; it simply acts as an indication for the AP process of which tax codes or groups to use.

Once the requisition is complete, it is submitted to the approvals process. At this point it is still a request – not yet a purchase order. The key difference is that purchase requests can be rejected, whereas purchase orders represent a commitment already made to a supplier.

Approving a Purchase Request

As the person raising the requisition, you can track your purchases under the My Orders menu. From here you can see that the request has entered the approvals process – in this example it's sitting with Ray Ford.

Approvers in Medius Rapid Deliveries for Procurement are determined by a routing table – a routing matrix maintained by customers. As a starting point, the distribution logic for who approve is the same logic used for non-PO invoices. Customers can of course modify this logic going forward, but for speed and simplicity of implementation, the initial setup will mirror non-PO invoice approval routing.

The approver receives an email notification but can also see on their Medius dashboard that they have a purchase request to handle. Where the Budgets value added item is enabled, the approver can view the budget position and make their decision accordingly. In this case, Ray approves the line and sends the transaction forward.

At the point of approval, approval limits are validated. In Rapid Deliveries, these are general limits – meaning the same limit applies regardless of what is being purchased or against which accounting string. For example, an approver might have a \$10,000 limit across every department they cover. This is called a general approval limit and is the default starting point for rapid delivery implementations.

If approvers approval limit is exceeded, the request escalates automatically to the next approver in the routing table.

Once the final approver has approved the transaction, it returns to the requisitioner in a workflow step called Send to Supplier. By default, this is a manual step, but it can be configured to be automatic – meaning the platform sends the order to the supplier immediately after the last approval, without any manual intervention. This does rely on supplier master data, specifically supplier contacts being present for ordering purposes. If contacts are missing, the order will always land in the manual step.

When the order is sent, the supplier receives an email with a PDF attachment of the purchase order. The email is sent using the customer's own email domain – configuration is required to authenticate Medius to that domain, so suppliers receive the order from a familiar address.

The purchase order template is a system template that can be tailored per company. Permitted customisations in Rapid Delivery include logo placement and, optionally, the addition of terms and conditions. No other customisations are available within the rapid delivery scope.

Goods Receipting

Medius Procurement supports both two-way-matched and three-way-matched transactions, with the three-way-match approach being the default one. Once the order is sent to the supplier, a goods receipting task is triggered. This task is assigned to the person who raised the requisition – or, if someone else was named at the point of requisition as the goods received-by person, it goes to them.

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The purpose of this task is to confirm whether goods or services have been delivered. Confirming delivery creates a delivery line, which is then used in Medius Accounts Payable for three-way matching.

The goods receipting process is straightforward. The person completing it is asked to confirm, out of the quantity or amount purchased, what was actually delivered. They enter the quantity received — in this example, five items — and optionally a delivery note reference, which can help further down in the invoice matching process. Once confirmed, the delivery is recorded, the order line is closed, and full invoicing can commence.

Customers Responsibilities

In Rapid Deliveries of the Procurement module, customers are responsible for the following:

- Design and maintenance of the Purchasing Category structure.
- Creation and maintenance of both Billing and Delivery addresses.
- Assignment of user roles specific to procurement to their user pool.
- Creation, maintenance, and assignment of procurement approval groups to requisitions and approvers.
- Creation, maintenance, and assignment to users of the procurement permission groups.

Optional Value-Added Items

Value added items are purchased separately by customers and can be included in the Rapid Application Delivery. For expediency, value added items are always implemented after the initial Rapid Delivery go-live.

Procurement-specific value-added items are as follows:

Internal Catalogues

Internal catalogues technically exist in the platform out of the box. However, the guidance, training, and configuration support for setting them up is a value-added item that must be purchased separately from Medius.

Catalogues allow customers to create a curated list of products or services that users can buy. Rather than relying on free text entry for every purchase, the user simply opens the catalogue, selects the item they want, and a transaction line is created ready for purchase. It's a fast and controlled way of buying within Medius Procurement.

External Catalogues – Punchout

Another value-added item available as an additional scope item is access to external catalogues — also known as punchout. Here, Medius's implementation team works with the customer and their existing supplier accounts. An external catalogue is a purchasing catalogue maintained directly by the supplier on their own website.

Users access the external catalogue by “punching out” to the supplier’s website, where they can browse and select items just as they would during a normal online purchase — without entering credit card or bank account details. The selected items are then returned to Medius, where they go through the standard approval process. Only once fully approved is the order sent to the supplier.

Setting up punchout is a collaboration between the customer and the supplier. It requires the supplier to support punchout capability and to support the standard that Medius can accommodate (OCI 4.0 only).

Budgets

Budgets in Medius Procurement allow customers to apply controls or visual guidance to requisitions about the availability of funds related to their purchase. This practice is used to further control of the spend activities. Budgets also allow approvers to be better informed when making their approval decisions, with visibility of spending against the budget amount in the approval process. Enablement of budgets gives customers the ability to also include non-PO invoices in the budgeting calculations, further enhancing this value-added item’s proposition.

Budgets must be defined by customers, and the maintenance of budget data is the customer’s responsibility. Budgeting in Medius allows customers to send budget data using a dedicated REST API; customers, however, are responsible for developing their own capability to use that API. Technical guidance about the Budget API capabilities is provided if the Budgets value added item is purchased.

Custom Free Text Forms

For most businesses starting out with procurement, catalogues aren’t day one. Your team is raising requests through free text — describing what they need, adding a price, and sending it for approval.

To add structure to this buying channel, Custom Free Text Forms are implemented.

Instead of a blank description field, your buyers get a structured form tailored to the type of purchase they’re making. The right fields, in the right order — so nothing gets missed and purchase orders go out complete.

You decide what each form captures, what’s mandatory, and what prints on the order sent to the supplier. If a specific answer should trigger a different approval path, those fields connect directly to your approval routing — automatically.

Forms are configured in minutes and live immediately. No catalogue required to get started.

As your procurement maturity grows, catalogues can be introduced alongside. But from day one, your team has structure, your approvers have the information they need, and your suppliers receive clear, complete purchase orders.

Purchase Order and Delivery Line Integration to the ERP

When a purchase order is approved in Medius, the job isn't done. That order needs to exist in your ERP — and when goods arrive, your ERP needs to know about it. Without integration, someone manually re-keying data between two systems. That's time, and that's risk.

Medius removes both.

Once a purchase order is approved and sent to the supplier, Medius automatically pushes it to your ERP. No manual entry. No duplication. The order is in your financial system the moment it's confirmed.

When goods arrive, your team records the delivery in Medius — entering what was received, against which PO lines, and when. That goods receipt is sent to your ERP automatically, keeping your financial records accurate and your accruals up to date.

And because Medius is connected end-to-end, those confirmed deliveries feed directly into the invoice matching process. When a supplier invoice arrives, Medius already knows what was ordered and what was received — so matching happens automatically, without anyone having to chase paperwork.

The result is a complete, connected process: from requisition, through approval, to purchase order, goods receipt, and invoice — all without manual handoffs between systems.

For customers on NetSuite or Dynamics 365 Business Central, this integration is available today using the Medius Managed Integration package. All other ERPs can consume the PO and delivery data using the available REST API integration. Customers are responsible for implementing the integration process, which can utilise Medius REST APIs.