Ingenia gains **full visibility of invoices and spend** with Medius

Case study

The **Company**

Thanks to Medius AP Automation, Ingenia has achieved a digital, efficient, and fast purchase-to-pay process with full transparency and control.

Ingenia is an Australian company listed on the ASX (INA) with a portfolio of more than 90 communities including holiday parks and resorts, independent living, rental, and property development. With a combined community of more than 8,800 residents across the Ingenia properties and over 900 employees, Ingenia is a rapidly growing business with numerous accommodation options and inhouse developments.

Success story
summary

— Ingenia, a rapidly growing holiday and lifestyle accommodation company, sought a new purchase-to-pay (P2P) solution for their sites across Australia.

— They were looking for a secure, robust, cloud-based solution with seamless integration to their JD Edwards ERP.

— Medius AP Automation ticked all the boxes for efficiency, security, and proven implementation experience.

— With Medius, Ingenia now has full visibility of requisitions, purchase orders, and invoices, improved governance and a streamlined accounts payable process across all locations Australia wide.

Seamless
deployment across multiple sites

With multiple sites across Australia, Ingenia required a P2P solution with a track record and proven integration with their ERP system, JD Edwards. They needed a quality, cloud based AP solution that was secure and capable of processing more than 300 invoices a day.

"We run a lean team and the preference was to select a hosted solution with a high service level agreement offering. Medius ticked the boxes for us. The fact that Medius had integrated with JD Edwards before was of benefit", said Paul Grant, General Manager IT.

In addition, Medius could provide a strong track record and expertise in the purchase to pay area. Sean Dent, General Manager Finance, adds: "A few of the other products that we considered were not as mature and not cloud-based, so Medius was the preferred solution. With Medius it's clear that purchase-to-pay is what they do and it's not a small part of something else".

> The technical team at Medius really know their stuff and support us as well. It's chalk and cheese compared to what we had before. **Medius is so much better.**
>
> **Paul Grant, General Manager IT**

Streamlined
AP process

Through implementing Medius AP Automation, Ingenia has been able to streamline its accounts payable process and make efficiency gains in the finance department, allowing the business to grow without increasing the cost base of the business. Manual tasks have been reduced in the accounts payable team freeing up time and allowing the business to grow without needing additional AP head count.

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Medius has allowed us to improve our AP processes. We've been able to increase the authority levels of park and community managers because expense invoices are now captured quickly, go straight into the system and we have a clear line of sight on our cash requirements.

Kylie Holzgrefe, Commercial and Transactional Manager

Efficiency gains **and full visibility**

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> **With Medius we have instantaneous visibility. We can see where everything is in the system, which inbox an invoice is sitting in and then get in and pay it immediately if need be.**
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> **Sean Dent, General Manager Finance**

Ingenia needed a system to track and capture invoices across all park locations. With Medius the transparency of AP processes is enhanced. All invoices have moved online and are immediately visible in the system with better visibility and ownership at each site.

"We had a situation where a vendor called to query an invoice and our CFO was able to answer the question regarding the status of an invoice payment over the phone and on the spot. Previously they would have had to contact the commercial and transactions team. We now have transparency and can easily locate requisitions and purchase orders in the system," comments Sean Dent, General Manager Finance.

"Medius allows us an easier way to access the data we're interested in. We didn't have transparency before Medius and it wasn't easy to find requisitions and purchase orders.

"Medius has saved us time in processing invoices. We have better visibility over the spend and from an operations manager point of view its saved processing time as we can see the historical invoices in the system. Prior to Medius our head office would have had to scan and email invoices. Now it's all visible in the system," says Kylie Holzgrefe, Commercial and Transactional Manager.

Training:
key to successful implementation

The implementation of Medius was a steep learning curve for park managers who were introduced to new processes including requisition, purchase order, and electronic invoice management. The dynamic nature of Ingenia's business as well as the high rotation of staff provides ongoing challenges.

"We invested time in composing training materials for our end users that proved invaluable when we went live and when we onboarded new users post go live," observes Kylie Holzgrefe, Commercial and Transactional Manager.

"Medius is highly configurable, so having more time for design up front and allowing the team a more in depth understanding of our business structure enhances the process and implementation and I recommend this for other companies that are going to implement Medius," says Paul Grant, General Manager IT.

About **Medius**

Managing AP and finance should be about strategy, not stress. You shouldn't have to sift through endless emails, PDFs or paper to get invoices confirmed, coded and paid, so you can (heaven forbid) go home. You shouldn't have to scramble to pay suppliers and keep them happy or cross your fingers no surprises land in your inbox that jeopardize the numbers you've presented to the boss and the board. You shouldn't have to worry about a fake invoice subjecting you to fraud. And you certainly shouldn't have to fret about finding a solution that is actually a solution – one that doesn't add expensive consultants and costs instead of speed and simplicity.

Let's replace all that worry and wondering with calm and confidence. Medius links all of AP together – from invoice capture and processing all the way through payment. With one look at a demo, you'll see how Medius takes you beyond basic automation and minor improvements to let Artificial Intelligence (AI) do most of the work for you, so you can get done, go home and rest easy. You'll know exactly what's paid, what's pending, and that your forecasts are spot on. 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.

www.medius.com