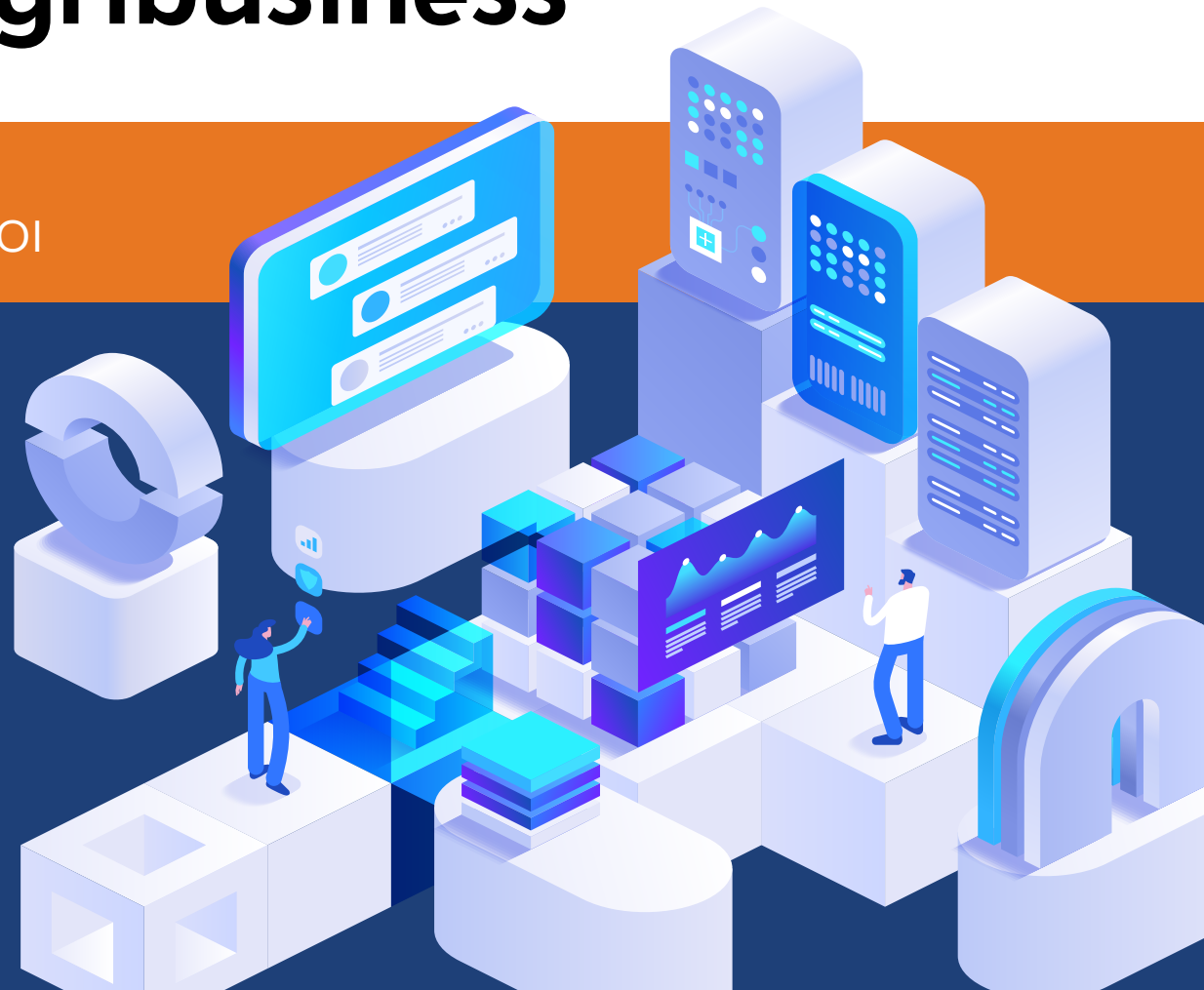


# Harvesting Efficiency: Your Complete Guide to Document Automation in Agribusiness

Leveraging Information Management for Efficiency, Collaboration, and Continual ROI



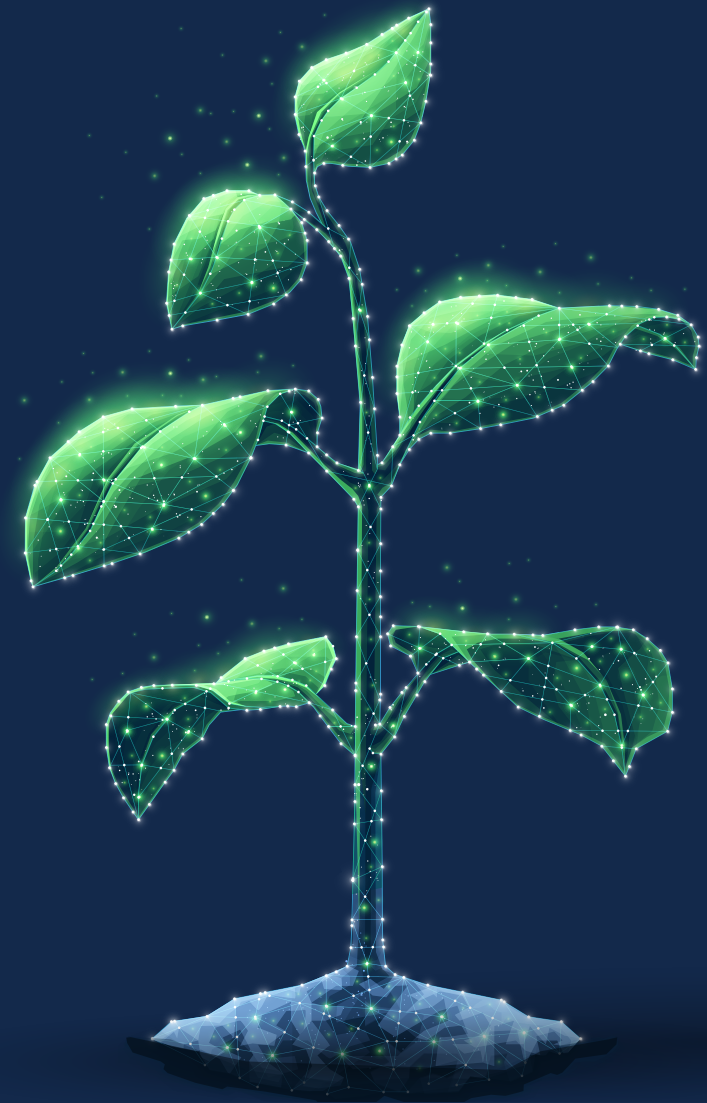
# What to Expect from This Guide

This guide provides a detailed overview of how AI-powered intelligent information management (IIM) helps agribusinesses work with more efficiency, productivity, and communication while helping their bottom lines. Whether you're looking to streamline logistics, simplify payment and procurement, manage vendors and contracts, or automate any number of operational tasks, this guide is the ideal starting point to find a solution that will work for you for years to come while feeding your operations with valuable data amidst AI advancements.



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# Growing Agribusinesses with Growing Challenges

Agribusiness is an economic staple, keeping the world fed, healthy, and sustainable for years to come. Multi-farm operations, agricultural co-ops, and countless other agribusinesses have made massive technological strides that have yielded great results for their operations, but for many agribusinesses, the way information is managed has remained largely the same.

## For Example:



Despite a **12% decrease** in paper check payments to farmers over the past year, **over 70% of grain settlements** are still processed via paper checks. ([Businesswire](#))



Supply changes have faced disruptions due to logistical barriers, transportation delays, labor shortages, and vendor inconsistencies, at least in part due to information access.



Procuring goods such as feed, seeds, and other supplies is often complicated by a lack of process visibility.



In 2020, agricultural contracts governed the production of about **33% of all U.S. farm commodities** by value, but these contracts are often difficult to manage manually. ([USDA](#))

The benefits of automation don't have to end with your fields, sites, and storehouses. Intelligent information management provides ways to keep information flowing and feed the business side of agriculture with crucial, decision-making data.



# Benefits of Intelligent Information Management in Agriculture

Intelligent information management paves the way for greater efficiency and collaboration in agribusiness, connecting sites, automating information-based processes, and allowing you to leverage your data for more informed decisions.

## ✓ Put Your Data Into Motion

Extract stagnant data from any document and use it to feed processes and decisions within Agvance, AgVantage, and other line-of-business applications. Generative AI takes document capture to a whole new level, improving accuracy and eliminating barriers like formatting challenges, setup costs, and the need for technical knowledge.

## ✓ Access Information Across Locations

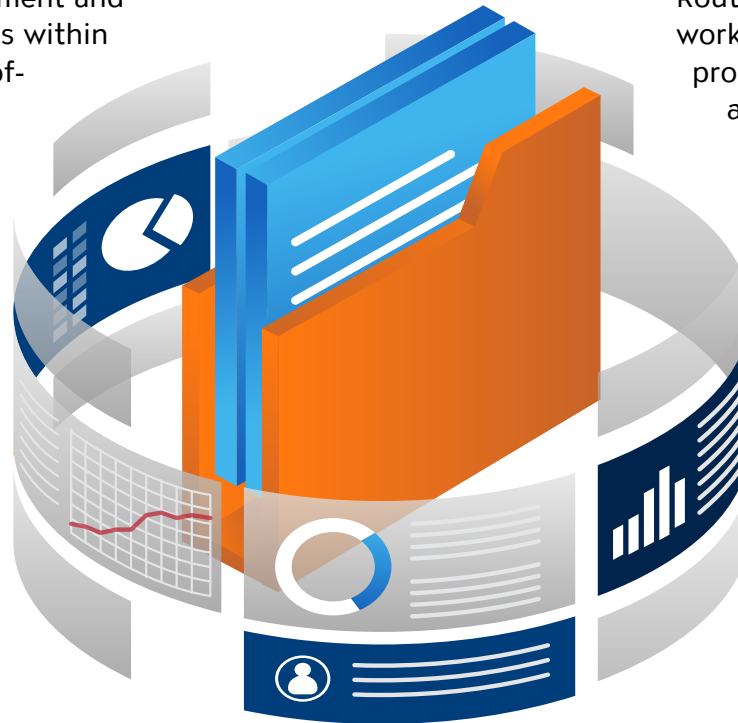
Securely locate contracts, invoices, sales orders, credit applications, and countless other documents across locations for complete visibility and collaboration.

## ✓ Automate Vital Processes

Route information through flexible, guided workflows to automate invoice processing, procurement, ledger coding, payment processing, and much more.

## ✓ Future-Proof Your Agribusiness

By creating structured, digital processes around your data and operations, you lay the groundwork for future automation that will support your growth for years to come.



# Agribusiness Necessary Features

Intelligent information management solutions are often suited for many different industries, so finding one with features that keep agribusiness in mind is a crucial step in ensuring success. Look for IIM solutions that include:

## Seamless Integration with Industry ERPs

Not all IIM solutions offer compatibility with industry-focused applications. Looking into providers with proven track records for ag-focused platforms like Agvance and AgVantage ensures these integrations will run and be delivered smoothly.

Having these integrations in place eliminates manual data entry, reduces human error, and ensures that invoices, purchase orders, delivery records, and vendor data flow smoothly between systems. This ultimately provides you with a unified view of operations across your farms, processing sites, and administrative offices.

## Generative AI-Powered Capture Automation

Leveraging the data in your documents is crucial to successful automation, but traditional document capture methods can be costly, inaccurate, and struggle with clustered, oddly formatted, or semi-structured data.

Generative AI changes the game, extracting data from seed orders, credit applications, W-9s, packing slips, and countless other documents with little to no effort and regardless of format or layout. This ground-breaking capture technology drastically reduces processing time and ensures you get clean, usable data without the costly setup.

## Workflow Automation and Customization

Workflow automation is a must for automation of any kind, but its potential ranges greatly depending on your provider. Look for IIM solutions with customizable, low and no-code workflows that can adapt to your processes. This will allow you to adapt workflows to your agribusiness needs, automating tasks like expense and non-expense invoice approval, order processing, inventory management, and much more.

## Scalability and Flexibility

Agribusinesses have the potential for immense growth, and their automation efforts need to be able to grow with them. Whether you're expanding your acreage, opening new co-op locations, or adding new offerings, your intelligent information management system should adapt to seasonal workload changes, workforce shifts, and evolving operational needs for long-term scalability.

# Ensuring a Successful Integration

Integrations enhance collaboration, information access, and efficiency by connecting information across your systems and automating additional tasks. But even with these tremendous benefits, a poorly implemented integration can set back your ROI immensely. The following steps will help ensure your integrations provide the value that's promised.

## 1. Choose the Right IIM Solution

Not all IIM solutions are integration-friendly, especially when it comes to industry-specific line-of-business applications. Look for a platform that:

- ✓ Has proven integrations with your applications.
- ✓ Offers low-code or no-code configuration options.
- ✓ Supports real-time data exchange & workflow automation.

## 2. Assess Compatibility Between Platforms

Before investing in an IIM solution for your agribusiness, evaluate whether it:

- ✓ Works natively with your other platforms or requires third-party middleware.
- ✓ Can adapt to custom fields and workflows from other applications.
- ✓ Supports scalability for future growth.

## 3. Prioritize Configurability Over Customization

Custom-built integrations may seem ideal, but they are often costly and difficult to maintain. Instead, look for configurable solutions, allowing for tailored workflows without extensive IT development.

## 4. Test and Validate Before Full Deployment

Before rolling out an integration across your agribusiness:

- ✓ Run a pilot program with a small sample of documents.
- ✓ Validate the data to ensure accuracy.
- ✓ Optimize workflows to eliminate inefficiencies before scaling.

## 4. Secure Ongoing Support and Scalability

As automation platforms for agribusiness continue to evolve, you'll want to take advantage of the latest tools and automation efforts to stay competitive. Ensure your IIM solution offers:

- ✓ Continuous support to troubleshoot integration issues.
- ✓ Automatic updates to stay compatible with new versions of integrated solutions.
- ✓ Scalability to accommodate growth, acquisitions, or new compliance requirements.

# Automating For Efficiency

Intelligent information management offers ways to automate the redundant, monotonous, and time-consuming tasks in many agribusiness departments. With the time saved, your staff can refocus their efforts, enhancing productivity and helping your operations scale.

## Accounts Payable

Agribusinesses manage numerous vendors for supplies, tools, machinery, distribution, and more. These vendors are frequently paid on credit, requiring efficient invoice management and timely payments. By automating the accounts payable process, agribusinesses can reduce errors, build better vendor relationships, reduce operational costs, and take advantage of early payment discounts.



### Steps to Effective Accounts Payable Automation



Invoices are scanned, and data is extracted using generative AI-powered capture

Extracted data is validated for accuracy and quality



Invoices are routed to approvers, where they can be confirmed or denied

A payable invoice is created in the enterprise resource management or financial system of your choice



The invoice is archived in an ECM system to meet regulatory standards



## Purchase Requisitions and Procurement

Agribusinesses also provide wholesale crops, growing supplies, and equipment leases on credit, often requiring manual data entry into financial management systems, follow-up reminders for payment collection, and organized management of invoices, order documents, and lease agreements. These time-consuming and error-prone activities can be drastically improved with intelligent information management by:

- ✓ Capturing purchase orders, sales orders, lease contracts, and invoices to be shared with a financial system
- ✓ Prompting automatic payment reminders based on the information within these documents
- ✓ Providing convenient access to transaction records to answer incoming questions about payment and services

## Order Processing and Delivery

Logistics, supply challenges, and other forces at work can make order fulfillment unpredictable. This makes transparency and communication all the more important. Intelligent information management can enhance this transparency by:

- ✓ Providing detailed reports during order contract review so that terms are completely understood and agreed upon
- ✓ Facilitating full visibility of order status, including processing, delivery, and payment
- ✓ Issuing updates and reminders with automatic workflows

## Vendor Onboarding

Agribusinesses don't operate in a vacuum; they rely on vendors for services like equipment leases, supplies, shipping, and more. Onboarding these vendors often results in frequent back-and-forth communication, missed information, and other inefficiencies when adding them to your business applications.

The right intelligent information management system can simplify this process with web forms. Simply send vendors a link to direct them to a workflow-guided form, ensuring inputs are in the correct formats, only prompting relevant questions, and routing the gathered information directly to your other systems.

## Contract Management

Contracts, including vendor agreements and sales contracts, often have hectic sign-off and approval processes and multiple versions stored sporadically, creating chaos and confusion when term disputes arise.

The ability to generate contract summaries with crucial terms, search these records in full-text, and control which versions are displayed by default gives your agribusiness full visibility into terms, allowing you to resolve disputes with ease. Workflows for these contracts can also streamline signing and approval while notifying staff of upcoming expiring terms.

# Growing Your Future with Data

With new breakthroughs in AI technology occurring in rapid succession, the potential for automation tools is filled with possibilities. AI is expected to enhance everything from predictive analytics for harvest yields and crop planting to inventory management and quality control. AI is only as good as the data it has access to, though, meaning records for these operations need to be digital and machine-readable.

The good news is that intelligent information management is also evolving with AI, and it's feeding each of these efforts. By extracting data from any document with unprecedented ease and accuracy, generative AI-powered capture stands to usher organizations of all kinds into a more productive future.



# Managing User Adoption

Change is conflicting for most people, and it can be difficult for people who have worked one way for decades to adopt a new approach. Despite this, there are a few key ways to help your agribusiness embrace change and take advantage of the newfound benefits.

**Help Your Staff Feel Vested:** Involve them in the solution selection process. Hear their concerns and input, and explain the factors that led to the final decision. This will help ease concerns about the suddenness of the change and show them that you are working with their best interests in mind.

**Assign Someone to Manage the Transition:** A primary point of contact for any questions or concerns can help ensure a smooth transition and act as a liaison between your staff and your solution provider for additional assistance.

**Provide Tools For Success:** Solution education, customer support, and self-help resources, such as a knowledge base, all ensure your solution kicks off without a hitch and your staff can hit the ground running.

# Maintaining Security

Agribusiness is an economic necessity, and as automation is implemented to ensure long-term success, it becomes ever more critical that these efforts are protected. Ransomware attacks are frequent in agribusiness and seek to disrupt operations until the ransom is paid.

In fact, in 2023, agribusiness ranked as the [7th most targeted industry](#) for ransomware. Sensitive data such as staff records and financial information may also be targeted in these attacks. Luckily, there are simple tools within well-designed IIM solutions that bolster security and create systems of accountability.



## Account-Based Access Controls

By ensuring each user's account for your solution only allows access to the information they need to do their job, you not only enforce privacy compliance within your organization you also limit potential breaches of sensitive information, should that account be compromised.



## Data Encryption

Encrypting data while it is stored and transmitted ensures that, if intercepted, it can't be deciphered without access to an authorized account for your solution.



## Single Sign On

Tying employee accounts together and tracking login activity under one domain gives system administrators crucial oversight to track suspicious activity and catch breaches before they cause damage.



## Compliance Certifications

Cloud solution providers with certifications in system and organization controls (SOC) compliance have been proven to work according to a high information security standard, ensuring your agribusiness' data is in safe hands.



## Two-Factor Authentication

Well-designed two-factor authentication systems can reduce the risk of account compromise by 40-50% ([Cybercrime Magazine](#)). Requiring users to verify their log-in attempts can often stall hackers and alert account owners, providing ample time to adjust login information, cancel an account, or take other preventative measures.

# Success Stories

## Farmward Cooperative

Farmward Cooperative, headquartered in Morgan, Minnesota, is a progressive agricultural organization, operating across 11 locations and offering essential services in grain marketing, agronomy, and energy delivery to its member-owners and surrounding communities.

### The Challenge

Farmward's Accounts Payable team faced significant challenges, processing nearly 500 invoices per month across 11 locations. AP staff faced inefficiencies around approval tracking and paper use, especially during peak seasons.

### The Results

After evaluating several vendors and speaking with neighboring co-ops, Farmward selected Square 9 for its deep customization capabilities, excellent customer support, and proven API integration with Agvance.

With Square 9, Farmward streamlined invoice approvals, drastically reduced paper usage, and enabled secure, remote access to AP records. Staff can now generate reports in seconds, improve responsiveness to internal requests, and post directly into Agvance with extracted data.



*"Now, I do the majority of my work in Square 9. I am in there sending out invoices to the different approvers, posting them when they come back, and dealing with different vendors on any account issues. Then there's month end, making sure everything is ready, and working with our Controller to ensure certain things are posted,"*

**- Anna Petersen**

Accounts Payable Administrator at Farmward Cooperative





# Success Stories

## Heritage Cooperative

Heritage Cooperative, a trusted agricultural retailer serving over 3,500 farmer members and 4,000 customers, operates across 30 locations with a staff of 260 employees. Guided by their motto, “Working Together. Winning Together,” Heritage sought a more efficient way to manage its growing volume of information.

### The Challenge

Heritage was looking to replace their previous system that made locating, retrieving, and collaborating on important files far too difficult. As documents flowed in from across dozens of locations, staff lacked visibility into the status of processes like invoice approvals, which quickly led to inefficiencies and errors.

### The Results

Square 9 provided a game-changing solution through its intelligent information management platform, delivering complete visibility and streamlining the entire payables process. A key differentiator? Square 9’s integration with AgVantage, Heritage’s agriculture-focused ERP. This integration eliminated data entry and provided further automation for their investment.

Since its implementation, Heritage has seen a nearly 20% boost in productivity while saving over \$4,000 annually on off-site storage, filing cabinets, and paper-based costs. They’ve also reclaimed 20 hours per month in labor savings from reduced document handling. Most importantly, employees now trust the accuracy of their document data and can find what they need instantly, enabling faster decisions and greater collaboration across the organization.





**square9**  
Taking the Paper Out of Work

## Why Square 9

Square 9 is an AI-powered platform that transforms your business documents into actionable information, no matter the source. From vendor invoices and purchase orders to contracts and bills of lading, we capture and organize the critical data hidden in your documents, giving it structure, context, and purpose. Our platform ensures the right information reaches the right people, empowering your entire organization to work smarter and make faster, more informed decisions.

Square 9's agribusiness solutions facilitate effortless operations by helping you take control of your information.

**Contact Square 9 to get a no-obligation discovery session and see how transforming your agribusiness can lead to more efficient, cost-effective, and informed operations.**

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