



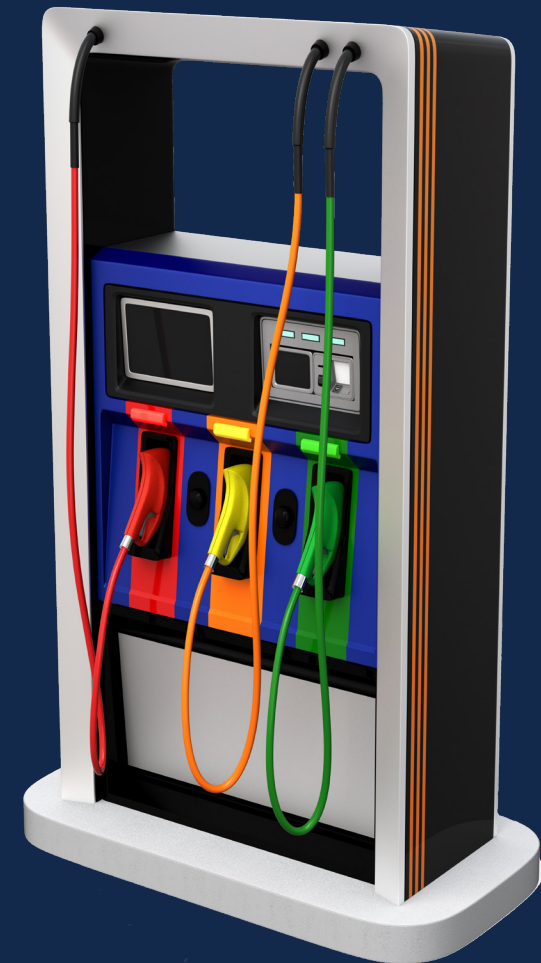
Fueling Efficiency: Your Guide to Managing C-Store Information

Leveraging Information Management for
Efficiency, Collaboration, and Continual ROI



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A Booming Industry Facing New Challenges

Fuel and convenience stores are amidst a rapidly growing industry, expected to expand by 10.23% by 2028 ([Yahoo Finance](#)). But as these chains expand to meet increased demand, growing pains begin to emerge within their operations that should be readily addressed. These challenges may include:

- ✓ Effectively managing revenue streams, payments, and vendor relationships
- ✓ Ensuring all employee documentation is collected and accessible
- ✓ Managing contracts with suppliers, servicers, and other vendors
- ✓ Maintaining access to crucial information across locations



Benefits of Intelligent Information Management for C-Stores

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

✓ Put Your Data Into Motion

Capture, route, and share information from your documents across business systems, using AI to extract and contextualize your data.

✓ Automate Time-Consuming Processes

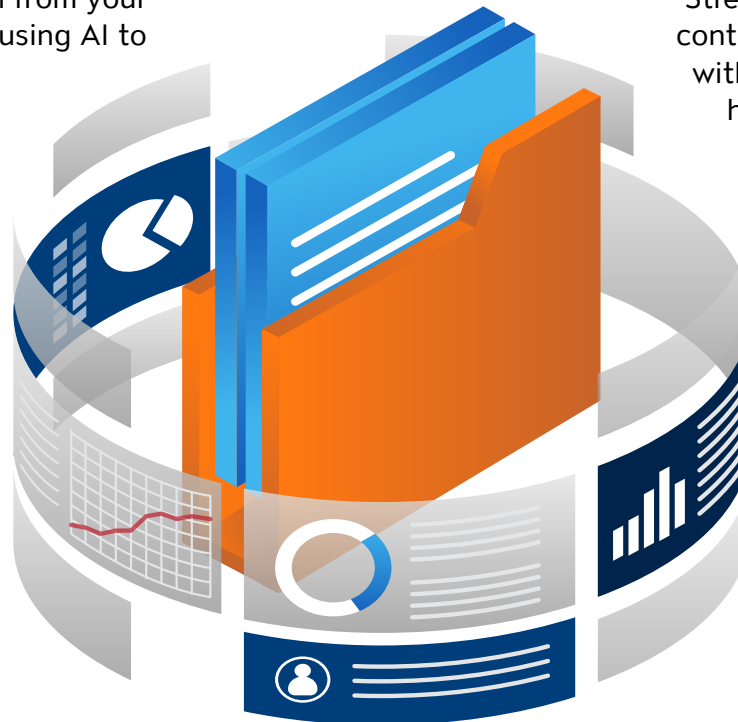
Streamline processes like onboarding, contract review, payment approval, and more with automated workflows that adapt to how you work.

✓ Centralize Your Access to Vital Information

Easily locate the information you need for accounting, audits, and more with a secure, searchable system that can be accessed from any modern browser.

✓ Future-Proof Your C-Stores

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.



C-Store Necessary Features

Intelligent information management solutions are suited for many different industries, so finding one with features that keep fuel and convenience stores 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. By looking into providers with proven track records for C-Store-focused platforms like PDI, these integrations can be ensured to 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 C-store locations and 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 by extracting data from invoices, vendor contracts, order forms, bills of lading, and more with little to no effort, 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 C-store's needs, automating tasks like expense and non-expense invoice approval, order processing, inventory management, and much more.



Comprehensive Compliance and Contract Management

Contracts are crucial to C-store operations, governing agreements with their suppliers and service providers. C-stores must also retain records for regulatory audits, including I-9 employment verification audits, health inspection audits, and more. Well-designed IIM solutions offer features like version control, audit trails, user-based permissions, and retention workflows to effectively manage contracts and compliance records.

Scalability and Flexibility

C-stores have the potential for immense growth, and their automation efforts need to be able to grow with them. Whether you're automating new tasks, adding new locations, or expanding your offerings, your intelligent information management system should adapt to your C-store's 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 C-stores, 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 C-stores:

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

5. Secure Ongoing Support and Scalability

As automation platforms for C-stores 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 automates redundant, monotonous, and time-consuming tasks that all convenience stores must manage. With the time saved, your staff can refocus their efforts, enhancing productivity and helping your operations scale.

Accounts Payable

C-stores manage numerous vendors to provide fuel, store inventory, payment services, and more. These vendors are frequently paid on credit, requiring efficient invoice management and timely payments. By automating the accounts payable process, C-stores can reduce errors, build better vendor relationships, reduce operational costs, and take advantage of early payment discounts.

Using generative AI to extract invoice, purchase order, and bill of lading data, this information can then be matched, routed for payment approval, shared with your ERP, and archived for later reference.

Employee Onboarding

With seasonal staff and the regular turnover expected from retail businesses, ensuring employee documentation is signed, stored, and retrievable can become a time-consuming chore. Intelligent information management simplifies this process to form-based workflows that guide staff through I-9 employment documents, W-2 tax forms, and much more.

Simply send new hires a link, have them enter their information, and route it for review and archival.

Vendor Onboarding

C-Stores don't operate in a vacuum; they rely on vendors for services like fuel, saleable goods, payment systems, 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 and direct them to a form that will guide them through the completion process and route the collected information back to you.

Contract Management

Contracts, including vendor agreements and sales contracts, often have hectic sign-off and approval processes and multiple versions stored across locations and offices. This creates 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 convenience store full visibility into your agreements, allowing you to resolve disputes with ease. Workflows for these contracts can also streamline signing and approval while notifying staff of upcoming expiring terms.

Future with Data

With breakthroughs in AI technology now occurring regularly, the potential for automation tools is filled with possibilities. AI is expected to enhance everything from inventory management and predictive analytics to customer service and marketing. 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 often conflicting for most people, and it can be particularly challenging for those who have worked in the same way for decades to adopt a new approach. Despite this, there are a few key ways to help your C-store 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 in their best interests.

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

Like most businesses, fuel and convenience chains must manage sensitive information, including employees' personal identifiable information and vendor financial information. Keeping this information safe digitally requires the same level of diligence as it would physically, but this diligence takes a different form. To maintain data security in your C-stores, look for solutions with:



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 C-store's 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

The Dutch Group

The Dutch Group, a Mississippi-based enterprise originally founded in 1972 as the Dutch Oil Company, has expanded far beyond fuel, managing an expansive network of family clinics, medspas, and pharmacies across four states.

The Challenge

Amidst the Dutch Group's growing success, invoice approvals were becoming time-consuming and inconsistent, leading to blocked vendor accounts and strained internal communication. Visibility into invoice status was also affected, and retrieving financial information often meant searching through physical file cabinets.

The Results

After implementing intelligent information management with Square 9, Invoices are now automatically captured, indexed, and routed for approval, with strict access controls ensuring that each store sees only its own records while leaders retain full oversight.

And thanks to seamless integration with The Dutch Group's PDI ERP system, staff can now verify payment status, track check numbers, and respond to inquiries in real time.

From improved visibility to enhanced efficiency, intelligent information management has empowered the Dutch Group's operations, saving time, boosting accuracy, and supporting smarter, faster decisions across the board.



"With Square 9, all the information is in there. You can see whether an invoice was sent or not. That really speeds up the payment process"

- Lily Setiawan

Corporate Controller at The Dutch Group



Why Square 9

Square 9 Softworks is a generative AI-powered platform that removes the frustration of extracting data from documents, forms, and all external sources, so you can harness the full power of your information. Release your team from repetitive tasks while your work flows freely in areas like accounts payable, order processing, onboarding, contract management, and more. The Square 9 platform captures your unstructured content, transforms it into clean, searchable data, and securely shares it across your organization to accelerate your decisions and actions.

Square 9's C-store 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 fuel and convenience business can lead to more efficient, cost-effective, and informed operations.

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