

Tapping into EDI Benefits: How a Single Integration Fuels Efficiency for Atlantis Management Group

Insights from Terry Valdivieso, CFO of Atlantis Management Group

Atlantis Management Group owns and operates convenience stores and fuel stations throughout the Northeast and has been a Fintech client for over 10 years. We sat down with their CFO to explore the transformative impact of PaymentSource® Premium on their operational efficiency.

Fintech: How many invoices do you process through Fintech each month?

Terry: On average, we process about 924 invoices monthly through Fintech.

Fintech: How much time do you save daily or weekly with Fintech's solution?

Terry: Our managers save at least 10 minutes daily, which adds up to roughly 28,500 minutes a month. Back-office personnel—like daily reporters, pricebook managers, and accounts payable staff—save about 5 minutes per invoice, totaling around 4,620 minutes monthly. These savings stem from fewer issues with missing invoices, manual errors, and the need for force balancing. We've also transitioned to fully item-level accounting for both operational and book purposes. Receiving invoices via EDI has significantly reduced inventory discrepancies. These efficiencies allow our team to focus on our main initiative: automating the end-to-end merchandising transaction process. This enables fully suggestive ordering, which not only saves time but also enhances the customer experience and optimizes inventory levels.

Fintech: Has there been any impact on customer service or operations?

Terry: Absolutely. With less time spent on daily paperwork, our managers now conduct regular audits in preparation for full automation of trade merchandising and suggestive ordering. This shift allows them to spend more time improving the customer experience, delivering more consistent and higher-quality service.

Fintech: Have you experienced any labor savings?

Terry: While we haven't reduced our workforce, we've shifted our focus. Operating lean has always been our strategy, and Fintech's solutions have enabled our team to work more efficiently. This positions us well for future growth. As an acquisitive company, we've been expanding for years, and thanks to this technology, we can absorb new sites without increasing our back-office headcount.

Fintech: Specifically, how has Fintech helped you grow?

Terry: Fintech has helped us grow by allowing us to manage our back-office headcount effectively. Over the past two years, we've added 20 COCO locations without expanding our finance department. Before adopting EDI and automation, our accounting team felt overwhelmed. But as we transitioned vendors to EDI, those concerns eased, and the workload became manageable. This has enabled us to scale efficiently while maintaining a lean operation.

Fintech: As CFO, how has using Fintech helped you personally?

Terry: It's been transformative. Fintech has reduced manual workloads, allowing my team to shift from data entry to strategic tasks. EDI invoicing has freed up time for higher-level reviews and improved our ability to catch vendor cost exceptions, which enhances inventory accuracy.

Fintech: Why did you decide to expand Fintech's digital invoice data capture beyond alcohol?

Terry: The timing was perfect. Our inventory manager met Fintech at a conference and learned they were expanding beyond alcohol. Their customer support was outstanding, and once we confirmed they were onboarding all vendors, we jumped at the opportunity. Their responsiveness made the decision easy.

Fintech: Did you have a dedicated team for managing vendor integrations?

Terry: Yes, Jen (our inventory manager) and Zelda (our data engineer) led the effort. But most of the implementation was handled by Fintech's team—Todd, Chuck, Sue, and others. We had tried onboarding vendors internally, but it was slow. Fintech's experience and vendor relationships accelerated the process significantly.

Fintech: Which departments benefit most from Fintech's PaymentSource®?

Terry: Pretty much all departments involved in the merchandise trade cycle—Operations, Daily Reporting, Inventory, Auditing, Pricebook, Merchandising, Accounts Payable, and Finance. Even Marketing benefits from improved data accuracy thanks to EDI. It's a comprehensive solution that streamlines workflows across the board.

Fintech: Who accesses the Fintech portal, and how does it help?

Terry: Mainly our finance team – daily reporting, inventory, and accounts payable. The portal helps them manage data more efficiently and ensures consistency across departments.

Fintech: You work with vendors of varying tech experience. How does Fintech help with that?

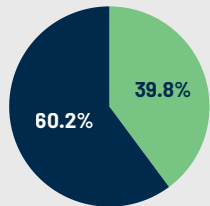
Terry: Fintech is great at accommodating all levels of tech sophistication. For less tech-savvy vendors, tools like the Invoice Builder make it easy to do business without heavy IT requirements. This flexibility helps us maintain strong relationships with smaller vendors, which are crucial for convenience store operations.

Fintech: How has it been working with Fintech?

Terry: Fantastic. We work with Sue, Chuck, and Todd, and they're proactive, detail-oriented, and truly feel like part of our team. It never felt like outsourcing—it felt like collaboration. Their dedication made the entire process smooth and successful.

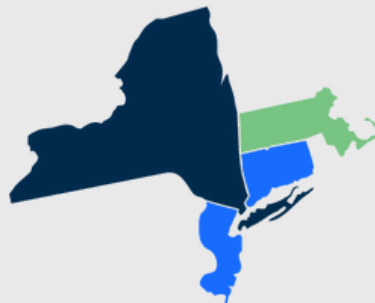
Percent of Invoices Processed by Type

● Alcohol
● Non-Alcohol



27

Distributors and Vendors Sending Invoices to be Standardized and Coded



94 Locations

Processing Invoices with Fintech Across 4 States

14.63

Line Items Processed per Invoice on Average

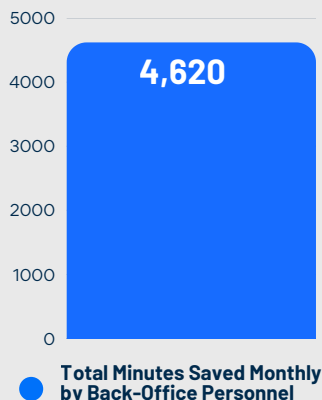
13,520

Line Items Processed per Month on Average

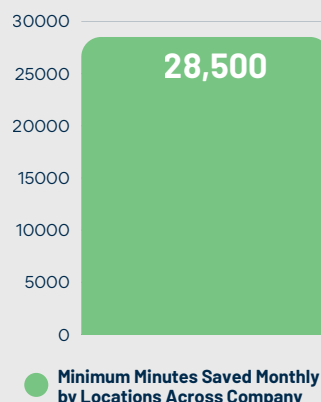
Fintech Client Since

2015

5 Minutes per Invoice Saved on Data Processing by Back-Office Personnel



Minimum of 10 Minutes Saved per Day by Location Managers




924

Average Monthly Invoices Standardized and GL Coded by Fintech

20 New Locations

Added in 2 Years without Needing to Expand the Finance Department

