



PDI Managed Services

Work Smarter, Not Harder



Managed Services

Reimagining your enterprise means focusing on the things that drive business growth and finding ways to work smarter, not harder. Hundreds of companies just like yours are doing exactly that by taking advantage of our Managed Services. Perhaps you're looking to reposition your staff away from labor-intensive tasks, or maybe you require a highly specialized skillset to run specific parts of your business. From hosting complex technology infrastructures in the private cloud to performing daily pricebook maintenance, our expert team has your accounting needs covered.

Experience you can count on

With PDI Services, you get a team of subject matter experts dedicated to your success.



Working with the PDI Managed Services team is one of the best decisions we've made. It really feels like teamwork on both sides of the house: wholesale and retail.

— Prince Oil

Our firsthand experience, applied to your business.



Payroll Services



Business Reviews



Accounting Services



Pricebook Services



Fuel Management

On the journey to drive efficiency into every part of your day-to-day operations, we'll be right by your side offering the support and service you need to achieve your goals. We manage the critical parts of your operation, so you can focus on growing your business. From your pricebook and accounting to your workforce and payroll, we have you covered.

We partner with you to provide:

- Experience and leadership
- Accurate reporting
- Scalability
- Reduced complexity
- World-class offerings
- Industry expertise
- Controlled labor costs

Accounting Services

Drive costs down and labor savings up.

In today's competitive environment, executives face the challenge of reducing costs while finding ways to increase productivity. PDI Accounting Services can help your company operate more effectively and provide affordable accounting expertise for your business.

PDI Accounting Services is an outsourcing service that provides convenience store automation, merchandise and fuel tracking, inventory control, management, and financial reporting.

Our team has a unique understanding of the opportunities and obstacles you encounter every day. We deliver optimum efficiency and profitability by improving technology, processes, and disciplines for your company.

Operate more effectively and economically by leveraging industry expertise, accounting, and systems support.



We partner with you to provide:

- Merchandise inventory tracking
- Fuel inventory tracking
- Accounts payable
- Payroll management
- Reports
- Financial statements

PDI Pricebook Services has add-on processing options to better service your processing needs.

Rebate Management Processing

Vendors and manufacturers are offering more incentives than ever before. How are you keeping track of them? How do you ensure you're getting paid what you're owed? Our team will set up the configuration of the rebate profiles, sponsors, accruals, billing, items, and packages. We will maintain rebate items in programs and address pricebook cleanup to get your rebates up and accruing as quickly as possible.

Cost Exceptions

Ever wonder if you actually receive every price you negotiated on your invoices? Our team will handle vendor setup and will review identified cost exceptions based on rules documented by your team. We will communicate issues to your team for review and provide invoice detail for credits back to the vendor on your behalf. We will post exceptions and send credits generated to the vendor and AP contact as well as archive copies in the vendor folders.

MarketLink

Cigarette manufacturers are paying additional funds for all of the manufacturer-related transactions that are captured in your POS transactional journals. The setup, maintenance, and monitoring of this process can be time-consuming and require skillsets in pricebook and technical areas, in addition to a responsive and persistent team, to ensure the files are approved and data integrity remains flawless. Our team will handle vendor profile setup, initial mapping rule creation, mapping rule maintenance, and MarketLink processing and batch processing. We will execute MarketLink reporting and communicate exceptions back to the vendor while monitoring transmission of site data daily.



Payroll Services

Focus on people, not paperwork.

Payroll processing is a high-stakes task that is time-consuming, stressful, and filled with unexpected challenges. Let PDI Payroll Services share the load, so you can focus on expanding your business, serving customers, and leading a productive workforce.

We partner with you for:

- Setup and maintenance of employees
- Processing payroll
- Payroll tax reporting
- Garnishment setup and processing
- Deductions setup and processing
- Reporting for payrolls
- Ledger postings for payroll
- Labor analysis reporting using data IDs
- ACA reporting handled via third-party integration
- I-9 reporting handled via third-party integration
- W-2 reporting handled via third-party integration

Stay up to date on industry trends, software updates, tax reporting, and more.



Minimize your administrative costs and maximize your investment and productivity with PDI Payroll Services.



Enjoy efficient and affordable payroll processing.

Employee Maintenance

High turnover is a reality of our industry, but PDI Payroll Services can ensure that your system keeps up with frequent employee hires, terminations, and status changes. A reliable verification system ensures changes are reviewed and approved before they take effect.

Time Capture

Employee training is expensive, and efficiency is a key component of cost control. Our time-capture processes strive to accommodate your existing capabilities, eliminating the need to retrain site personnel.

Deduction Processing

Payroll deductions are as varied and individualized as your workforce, meaning there is no standard method for applying accurate, across-the-board deductions. PDI Payroll Services has a wealth of experience handling deductions, including child support, garnishments, 401K contributions, employee charges, and more.

Payroll Calculation

Few business processes are as crucial to smooth operations as consistent, accurate payroll calculations. Unfortunately, overtime, shift differentials, tip reporting, and other considerations mean that payroll calculations are as complex as they are crucial.

Business Reviews

Make sure you are maximizing your investment.

Plainly put, business reviews stimulate business growth. You made an investment in our world-class technology, and we want to make sure you are profiting from all the benefits. A member of our team will meet with you to evaluate your current processes and practices in order to recommend changes that will allow you to use PDI Enterprise to its fullest potential.

We partner with you to:

- Maximize your investment
- Increase business efficiencies, reduce costs, and operate more effectively
- Integrate your business processes
- Streamline, standardize, and automate processes that are currently manual

Achieve your organization's greatest goals by working with our Business Review Team to develop unique software strategies for your enterprise.



Seize the opportunity for innovation, accelerate your digital transformation, and experience faster time-to-value.



Value design and assessment

Develop ideal concepts to determine, benchmark, and improve the value for advanced business outcomes:

- Review benchmarks and value drivers
- Consider investment needs
- Assess the business and optimize processes
- Measure performance against indicators
- Create a business case and value realization plan
- Ensure governance with a value management office

Pricebook Services

Expect precise, accurate prices the first time.

There's something special about a well-run centralized pricebook and its impact on your store associates. Imagine a world where your cashier quickly scans a customer's merchandise and the price is just right. Your manager smoothly checks in a delivery with their handheld device, and every item scans at the right cost. Your scan rate is at an all-time high and your shrink is at an all-time low. There's full inventory transparency because transactions are captured electronically with item-level detail.

Inventory values are precise and accurate for all department types. Sound too good to be true? It's not.

Businesses are constantly looking for ways to improve performance, increase efficiency, and implement strategies that maximize the bottom line. The effects of outsourcing your pricebook maintenance has the potential to reverberate throughout several parts of your organization. And when it comes to human resources, the potential impact is enormous.

PDI Pricebook provides centralized, electronic control of retail pricing and vendor costs, allowing you to maximize margins and improve accuracy.



Our team of experts has helped retailers across the country streamline their pricebook procedures and create the best possible customer experience.

With decades of retail pricebook and merchandise inventory experience, the PDI Pricebook Services team is capable of handling even the most complex of pricebook maintenance needs. Our analysts have access to the full range of PDI resources, including the developers who built PDI Enterprise, the consultants who implement it, and the customer service team that supports it. You can rest easy knowing your pricebook is in reliable hands with:

- Maximum use of the latest technology
- Established relationships with most major grocery wholesalers
- Adherence to standardization of key item characteristics, such as descriptions, sizes, brands, manufacturers, packaging, etc.
- The most current knowledge about POS enhancements and performance standards
- Access to the collective industry and technical knowledge available at PDI

Common Issues Pricebook Teams Face

- Unorganized procedures
- Breakdown in communication
- Inadequate pricebook knowledge
- Lack of time

What PDI Pricebook Services Offers

- Organized procedures
- Exclusive focus on pricebook
- Vast pricebook knowledge
- Best practices
- Experience you can count on

Fuel Management Services

Optimize your bulk fuel procurement and management.

Fuel inventory management improves your bottom line by helping monitor, manage, and optimize bulk fuel procurement, freeing up time and capital. Using our sophisticated software, our advisors manage your fuel inventory and usage down to the hour. We monitor daily fluctuations in the fuel market that could affect future pricing.

Our team uses industry-leading tools to buy at the right time from the right source, all while holding carriers and suppliers accountable and improving your cash flow. We review and validate each delivery and invoice, virtually eliminating supplier error. You'll gain prompt-payment discounts, and we even fund the transaction to improve your cash flow.

Centralize control with complete supply chain transparency.



Reconciliation provides monitoring, tracking, and reconciling of supplier invoices that integrate with financial systems to help eliminate supplier error.



Strategic Sourcing

- Aggregate and rank multiple suppliers
- Identify arbitrage and spot deal opportunities
- Leverage existing/develop new contracts

Inventory Management

- Monitor tank inventory levels and daily usage down to the hour
- Monitor daily market fluctuations in bulk fuel market
- Determine the most opportune time to purchase

Financial Services

- Provide optional line of credit to fund transaction (1 invoice)
- Review and validate delivery and invoicing
- Take advantage of prompt-pay discounts

About PDI

With 40 years of industry leadership, PDI Technologies, Inc. resides at the intersection of productivity and sales growth, delivering powerful solutions that serve as the backbone of the convenience retail and petroleum wholesale ecosystem. By “Connecting Convenience” across the globe, we empower businesses to increase productivity, make informed decisions, and engage faster with their customers. From large-scale ERP and logistics operations to loyalty programs and cybersecurity, we’re simplifying the industry supply chain for whatever comes next.

For more information about PDI, visit
www.pditechnologies.com

