

# K12Foodservice.com

## Manage Your School Commodities Online

### Login

To access your account on K12foodservice.com place your cursor in the address bar at the top of your internet browser and type <http://www.k12foodservice.com> in the space and hit "Enter".



You will be redirected to the K12foodservice.com public page. Type your user name and password in the upper right corner of the page and select "LOGIN". If you have forgotten your user name and password, click "Forgot your login or need access?". This will direct you to a page where you will be able to have your user name and password emailed to you. From this page you will also be able to download an access form if you need a user name and password.



### My Home

After logging in, you will automatically be sent to your account homepage. There will be two sections displayed in the center of the page, and a menu running along the left side of the page. Use this menu to navigate through K12foodservice.com.

The first section, labeled "Invoice Number Lookup", is very useful when completing sales verification. Simply enter in the invoice number listed at the top of your hard copy invoice (from your distributor) and hit search. The page that opens will include all of the transactions that were sent to K12Foodservice.com with that invoice number. This will be discussed further under the Verification section.

**Invoice Number Lookup**  
Invoice Number:

The Second section of the Homepage, labeled "K12 Updates, Events, and Postings", will display any information that the Manufacturers/Processors, or K12foodservice.com feels is important for you to know.

**K12 Updates, Events, and Postings**  
There are no postings at this time.

### Edit My Info

You are able to edit any of your account contact information, including your user name and password, and K12 Access/ Notification Options, by selecting "Edit My Info", in the gray menu section on the right side of the page. Once you are on the edit page, change any of your information, and select "Update" at the bottom of the page.

# Reports

## Verification

### *What is sales verification and what do I need to do?*

Manufacturers who use K12Foodservice.com to display Indirect Sales Discounts/Net-Off Invoice (NOI) commodity data for their school customers may also choose to use K12Foodservice.com to meet the Sales Verification requirement as stated in the Code of Federal Regulations, 7CFR 250.19. To read the regulation, go to <http://www.gpoaccess.gov/cfr/retrieve.html>.

When data from a certified commercial distributor is received and processed, invoice-level sales data is available on K12Foodservice.com. Around the 10<sup>th</sup> of each month, NOI customers receive email Reminders, with their username and password, to log on to K12Foodservice.com. Once logged in, we ask that you compare your online account information for the previous month and compare the web data to your hard-copy invoices from the distributor. Next, you will need to submit for each of manufacturer, whether or not the distributor gave the correct case amounts and discounts on for your commodity purchases.

### *Instructions for completing sales verification*

1. Log on to K12Foodservice.com.
2. Compare your hard-copy invoice, from your distributor, with the invoice data in K12foodservice.com.
  - Option 1: Enter the invoice number of your hard-copy invoice into the "Invoice Number Lookup" and select "Search". The page that appears will display all transactions that were sent to K12foodservice.com with that invoice number.  
  
Compare the commodity products, discounts, and case amounts that are on your hard-copy invoice, with the transactions that are displayed in K12Foodservice.com.
  - Option 2: Select a manufacturer to view from the drop-down menu on the left (navigation) side of the screen. Click on "Balance" to see your current balance, then click the 3<sup>rd</sup> icon on the top right of the report to review the transaction summary. Select the previous month from the list of months that run across the top of the report.  
  
Compare the commodity products, discounts, and case amounts that are on your hard-copy invoice, with the transactions that are displayed in K12Foodservice.com.
3. Once you have compared the data, select "Verification" from the menu section on the left.
4. For each manufacturer, select "Yes" or "No", enter comments if desired, and click submit
  - a. Select Yes if the data on the transaction summary fairly reflects the discount and cases received as shown on your invoices.
  - b. If you find a discrepancy, click "No" for that manufacturer and write a brief message describing the problem. This message will be sent to your broker and/or the manufacturers sales representative for your account. Someone will contact you shortly to resolve the problem. You can also contact the commercial distributor, broker, or manufacturer directly.

My Home  
 Edit My Info

**Reports**

- Verification
- Acct Summary
- Dist Assignment

**Manufacturer**

▼

To complete the verification of your transactions, please compare the hard copy invoice from your distributor(s) to the transaction data that can be found on the "Transaction Summary" page in the Balance section of the website. Once you have completed the comparison for all of your NOI processors, return to this page and click either YES or NO, then click Submit for each processor. By submitting YES response, you are acknowledging that all of your hard copy invoices match what is listed on the Transaction Summary of the website. By submitting a NO response, you are acknowledging that there is a problem with your transactions. When a NO response is submitted, an email is automatically sent to your broker, and the regional sales person for that processor, along with any comments you have written in the box provided below. Please note that Sales Verification is only required for processors that you are doing Indirect Sales Discount/NOI with.

If you have any additional questions about Sales Verification, please consult the K12Foodservice.com Survivor's Guide, which can be found by clicking the palm tree at the top of the page, or calling us at (301)251-5515.

	Yes	No	Comments
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

## Account Summary

This page displays a brief summary of the current year's allocations, balances, and percent usage. All of the manufacturers that you have diverted pounds to will be listed in alphabetical order. Below the list of manufacturers will be a sum of all of the commodity pounds that have been used year-to-date, as well as the amount of money that has been saved by utilizing these commodities.

My Home  
 Edit My Info

**Reports**

- Verification
- Acct Summary
- Dist Assignment

**Manufacturer**

▼

### BETHLEHEM AREA SCHOOL DISTRICT 2008-09 Commodity Summary Thursday, October 2, 2008

1. Cains Foods					
Distributor:	PFG-AFI	Brokerage:	GRANT HANSON ASSOCIATES INC.	Type:	NOI - Active
There are no allocations entered for this account.					
2. ConAgra Gilardi Foods					
Distributor:	PFG-AFI	Brokerage:	FOODSERVICE MARKETING	Type:	NOI - Active
Commodity	Alloc LBS	Alloc \$	Bal LBS	Bal \$	Usage
B077 - MOZZARELLA UNFRZ	16.176	\$ 23.77	16.176	\$ 23.77	0 %
3. J and J Snack Foods Corporation					
Distributor:	PFG-AFI	Brokerage:	ADVANTAGE MARKETING	Type:	NOI - Active
Commodity	Alloc LBS	Alloc \$	Bal LBS	Bal \$	Usage
B303 - BHW HRTH BULK UNBL	3,000.000	\$ 750.00	2,495.100	\$ 624.00	17 %

You have used **30,954.81** LBS  
 of commodity and saved  
**\$ 32,436.84**  
 in the 2008-09 school year.

## Distributor Assignment

To review and update distributor assignments, select “Dist Assignment” from the menu on the left. The page displayed lists all distributor assignments by manufacturer.

At the top of the page is an option to change ALL of your manufacturer distributor assignments to one distributor. To utilize this option, select the distributor you would like to switch to, type in the effective date (must be at least 2 weeks in the future), and click “Submit Request”.

Use this section to notify all manufacturers of a common distributor change request:

Select a distributor for all Indirect Sales(NOI)	10/15/2008	Submit Request
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If you are using more than one distributor for ordering commodity products, you will need to update the distributors by manufacturer. *Note: You may only be assigned to one distributor per manufacturer.* To update the distributor by manufacturer, find the manufacturer you want to update. In the drop down bar below the manufacturer's name select the distributor you would like to change to, enter the requested effective date (must be 2 weeks in the future), and click “Submit”. Your new distributor request will be viewable below the distributor drop down, along with the status of your request.

Use this section to notify individual manufacturers of a single distributor change request:

<b>Cains</b>		
Select a distributor for Cains	10/16/2008	Submit
Distributor PFG-AFI	Delivery Date Range 08/12/2008 to 06/30/2014	Status ACTIVE

*Note: Some manufacturers require approval of distributor changes. Below is a list of Manufacturers that do not require approval, and will allow the distributor change to occur after the 2 week delay.*

*McCains, Michael Foods, Schreiber, Uno, and Cains. All other distributor changes will need to be approved by the manufacturer.*

## Manufacturer Reports

### Select a Manufacturer

To view the account balance for a particular manufacturer select the appropriate manufacturer from the drop-down bar at the bottom of the menu section.

My Home
Edit My Info
<b>Reports</b>
Verification
Acct Summary
● Dist Assignment
<b>Manufacturer</b>
[Dropdown]
Cains
CA Gilardi
J&J Snacks
JM Smucker
Jennie-O
JTM
<b>McCain</b>
Michael Foods
Oasis
Pierre Foods
Red Gold
Schreiber
Tyson

Once the appropriate manufacturer has been selected that manufacturer's logo and home page will appear on the screen. You will also notice that a section titled “Reports” now appears underneath the “Manufacturer” drop-down bar.

My Home
Edit My Info
<b>Reports</b>
Verification
Acct Summary
Dist Assignment
<b>Manufacturer</b>
McCain
<b>Reports</b>
Products (PTV)
Balance
<b>Search</b>
Transaction

## Products (PTV)

The Products (PTV) section shows all of the products that are currently approved by USDA for commodity processing for the selected manufacturer. (Note: All products on this page may not be approved in every State, and also may not be carried by every distributor.) If you have questions regarding whether a particular product is approved in your State or carried by your distributor, please contact your State DA or Distribution Center.

My Home  
Edit My Info

**Reports**  
Verification  
Acct Summary  
Dist Assignment

**Manufacturer**  
McCain

**Reports**  
● Products (PTV)  
Balance

**Search**  
Transaction

Contains Commodity:  Product Nbr/Name:  SY  Sort by:

**McCain Foods USA Inc. Pass-Through Values for School Year 2008-09**  
Friday, October 3, 2008

**NOT ALL PRODUCTS ARE AVAILABLE IN ALL MARKETS.**  
Please check with your manufacturer's broker or commercial distributor for a list of available products.

- 1. 10310599 - McCain Zoomms! Ham & Cheese Stuffed Biscuits**
Active - Dependent

Commodity	# per Case	\$ per Case	Replaces
CHS - UNIVERSAL CHEESE BANK	3.660	\$5.38	
Effective 07/01/2008 to 06/30/2009		Serving Per Case: 84.00	Net Case Wt: 15.7500
  
- 2. 10310600 - McCain Zoomms! Pepperoni Pizza Stuffed Breadsticks**
Active - Dependent

Commodity	# per Case	\$ per Case	Replaces
CHS - UNIVERSAL CHEESE BANK	3.010	\$4.42	
Effective 08/01/2008 to 06/30/2009		Serving Per Case: 48.00	Net Case Wt: 18.0000

At the top of the Products Page, is a section that allows the products to be filtered based on three different criteria: Commodity, Product Name/Number, and School Year. After these criteria have been selected, choose and select how the result set should be sorted; either by product number, or product name, then click "Select".

Contains Commodity:  Product Nbr/Name:  SY  Sort by:

Each product is displayed in consecutive tables with all of that products information.

**Product Number (line 1):** This is the code that the Manufacturer assigns to each of their products to distinguish it from others.

**Product Description (line 1):** A brief description of the product.

**Product Status (line 1):** Will display the product as either "Active" or "Inactive". If "Inactive" is listed, the product is no long available for commodity processing, but is left on the list for historical viewing purposes.

**Commodity Dependency (line 1):** Each product is designated as commodity "Dependent" or "Independent". This designation is only significant where products contain more than one commodity.

*Dependent:* There must be sufficient allocation available of ALL commodities in the product for the customer to receive the PTV discount associated with the ordered product. If there is not sufficient allocation for even one commodity, the customer may not receive any of the PTV discount for that order.

*Independent:* The customer can receive the PTV discount for any commodity where there is sufficient allocation to support the order. If the customer runs out of one commodity but has a sufficient balance with other commodities, the customer can receive the PTV discounts for the remaining commodities.

**Commodity Code (line 3):** The code given by USDA for the raw material used to make the product.

**Commodity Description (line 3):** The description of the commodity.

**# per Case (line 3):** The number of "Donated Food" lbs used in one case of product.

**\$ per Case (line 3):** The discount value of the product. (May be shown in either lbs or cases.)

**Effective Date (line 4):** The dates for which the values contained in this table are valid.

**Servings Per Case (line 4):** The number of servings contained in one case of that product.

**Net Case Weight (line 4):** The weight of one entire case of product.

## Balance

This report shows allocations and balances, in both pounds and dollars, and usage rates, by commodity, for a particular recipient agency. This page can be found by selecting "Balance" under the Reports section of the menu on the left side of the page.

My Home  
Edit My Info

**Reports**  
Verification  
Acct Summary  
Dist Assignment

**Manufacturer**  
Red Gold

**Reports**  
Products (PTV)  
● Balance

**Search**  
Transaction

### 2-07-48-100 BETHLEHEM AREA SCHOOL DISTRICT - PA



<b>Distributor:</b> PFG-AFI	<b>Brokerage:</b> J AND S FOOD BROKERAGE INC.	<b>Type:</b> NOI - Active		
<b>COOP:</b> NONE	<b>Mgmt Co:</b> SODEXO			
Commodity	Alloc LBS	Alloc \$	Bal LBS	Bal \$ Usage
A245 - TOMATO PASTE BULK	5,760.000	\$ 2,566.08	2,260.280	\$ 1,007.29 61%

The RA Number/Name , Distributor, Brokerage, COOP, Management Company, and Account Type are displayed at the top of the Balance table. For each commodity, the total allocation (including adjustments and carry-over), current balance, and percent of allocation used are displayed. FFS accounts only display the data in pounds, NOI accounts display data in pounds and dollars.

### Quick Links from the Balance Report

There are also six quick link icons in the top right of the Balance table: (from left-to-right) Balance Summary , Monthly Usage Summary , Transaction Summary , Product Usage , Distributor History, and Account Information .

### Balance Summary

The Balance Summary the page that was discussed above. This is the first page in the balance section. The Balance icon is grayed out when being viewed.

### Monthly Usage Summary

This report displays usage for each commodity by month, in pounds, dollars, and as a percent of the total allocation. It is suggested to aim for a monthly usage target of 10% this display best use of commodity assets.

### 2-07-48-100 BETHLEHEM AREA SCHOOL DISTRICT - PA



<b>Distributor:</b> PFG-AFI	<b>Brokerage:</b> NATIONAL FOOD SALES	<b>Type:</b> NOI
<b>Mgmt Co:</b> SODEXO	<b>COOP:</b> NONE	

### CHS - UNIVERSAL CHEESE BANK

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Totals
#	0.00	-2,316.70	-3,161.74	-4,379.12	-3,219.12	-3,487.72	-3,665.80	-3,609.10	-4,339.80	-4,395.20	-3,303.75	-32.30	-35,910.35
\$	0.00	-3,363.86	-4,590.94	-6,358.54	-4,674.26	-5,064.20	-5,322.76	-5,240.42	-6,301.40	-6,381.84	-4,797.05	-46.90	-52,142.17
%	0%	6%	9%	12%	9%	10%	10%	10%	12%	12%	9%	0%	100%

## Transaction Summary

This report shows all transactions (Deposits, Deposit Adjustments, Carry-Over, Orders, and Order Adjustments) for an account. The report automatically opens to the current month. The month currently being viewed is displayed in **red** at the top of the page, along with the currently assigned distributor, brokerage, and account type.

Jul. Aug. Sep. Oct. Nov. Dec. Jan. Feb. Mar. Apr. May Jun. All										
> Type	Distributor	Date	Inv Nbr	Prod Nbr	Description / Memo	Cases	Finish LBS	DF LBS	Total PTV	\$
 ORD	PFG-AFI	09/10/08	2622005	MCL03624	McCain Redstone Canyon Cubes	23	690.00	-1,254.650	\$ -88.32	
 ORD	PFG-AFI	09/10/08	2622005	MCF04566	Harvest Splendor Deep Groove...	16	240.00	-470.560	\$ -89.44	
 ORD	PFG-AFI	09/12/08	2625212	MCF04566	Harvest Splendor Deep Groove...	8	120.00	-235.280	\$ -44.72	
 ORD	PFG-AFI	09/12/08	2625213	MCF04566	Harvest Splendor Deep Groove...	6	90.00	-176.460	\$ -33.54	
 ORD	PFG-AFI	09/29/08	2642069	MCF04566	Harvest Splendor Deep Groove...	48	720.00	-1,411.680	\$ -268.32	
<b>Order Totals:</b>						101	1,860.00	-3,548.630	\$ -524.34	

There are 5 transactions for September.

To view a different month's transactions select a month from the list running along the top of the transaction section of the page. To view all transactions, select "ALL".

**Details:** Select the green arrow icon to the left of each transaction to view more details about that specific transaction. A pop up window will appear showing more information about the transaction, including a breakdown showing which commodities were used for each item.

**Type:** Displays the type of transaction that is being displayed. There are several different transaction possibilities; Deposits (DEP), Deposit Adjustment (DEP-ADJ), Carry Over (COV), Order (ORD), or Order Adjustment (ORD-ADJ),

**Distributor:** The name of the distributor company that sent the product, and then sent the invoice data to K12. (Note: Only orders (ORD) will have a distributor associated with the transaction.)

**Invoice Date:** The date that the Recipient Agency (RA/School) was invoiced for that product.

**Invoice Number:** This field displays the Invoice number that is associated to a specific order.

**Product Number:** The number associated with the product ordered.

**Description/Memo:** The description of the Product ordered

**Cases:** The number of cases ordered that are associated with that specific transaction.

**Finished Lbs:** Displays the total weight of the cases for the transaction.

**DF Lbs:** The total number of DF Lbs (donated food lbs.) that were used to complete this transaction. This is the number of pounds that will be removed from the balance of this account for the transaction.

**Total PTV:** The total PT Value (pass through value) discount applied to the transaction. This is the dollar amount that will be removed or added to the accounts balance.

## Product Usage

This report summarizes product usage in pounds, dollars, and finished cases . The report defaults to year-to-date, but a specific month can be selected to view.

Jul. Aug. Sep. Oct. Nov. Dec. Jan. Feb. Mar. Apr. May Jun. All				
<b>MCF04566 - Harvest Splendor Deep Groove Crinkles</b>		<b>LBS</b>	<b>Dollars</b>	<b>Cases</b>
A212 - SWT POTATO BLK PROCC		2,293.98	\$ 436.02	78
<b>Totals:</b>		2,293.98	\$ 436.02	78
<b>MCL03624 - McCain Redstone Canyon Cubes</b>		<b>LBS</b>	<b>Dollars</b>	<b>Cases</b>
A232 - POTATOES BULK		1,254.65	\$ 88.32	23
<b>Totals:</b>		1,254.65	\$ 88.32	23

## Distributor History

The Distributor History page displays all of the distributors that you have been assigned to since your account was set up with that specific manufacturer. Below each distributor is a list of all of the commodity products that were purchased through that distributor, along with the number of cases, DF Lbs, and PTV Discount.

1. PFG-AFI					Active
Product	Manuf# / Dist#	Cases	DF	PTV	
Harvest Splendor Deep Groove Crinkles	MCF04566 / MCF04566	78	-2,293.9800	\$-436.02	
McCain Redstone Canyon Cubes	MCL03624 / MCL03624	23	-1,254.6500	\$-88.32	
Delivery Period 07/12/2006 - 06/30/2012		<b>Totals</b>			

## Account Information

When the Account Information icon is selected a pop-up window will appear showing all contact information related the the Recipient Agency account. This information includes RA Information, Recipient Agency Contacts, Distributor Information, Distributor Contact, Brokerage information, Manufacturer Regional Information, and K12 Contact Information.

## Transaction Search

The transaction search allows you to search for and export orders, deposits, adjustments, and carry-overs. The transaction search can be used to extract data from the web to excel for further data manipulation and reporting. Click "Transaction" under the Search section of the menu, and the search screen will appear on the following page. For more concise results, enter as much search criteria as possible. Once you have entered your search criteria, click "Search". An Excel Spreadsheet has been created. It will depend upon your personal computer settings on how the spreadsheet is retrieved. For some it will automatically pop-up, while others will need to save it and open from their files.

Transaction Search			
Select search criteria below:			
RA Name:	BETHLEHEM AREA SCHOOL DISTRICT		
RA Number:	2-07-48-100	State:	PA
Manuf Cust Nbr:	NA	Status:	Active
Brokerage:	PRESTIGE BROKERAGE	Type:	NOI
Distributor:	All	COOP:	NONE
Invoiced From:	07/01/2008	Mgmt Co:	SODEXO
Created From:	07/01/2007	To:	10/03/2008
Invoice Nbr:		Product Nbr:	All
Trans. Type:	ORD	Pass/Fail Trans:	Passed
Memo:			
Primary Sort:	RA Name	Secondary Sort:	NA
Preview or Export results by Commodity Level to an Excel File Submit			