



# **Recipient Agency User Guide**

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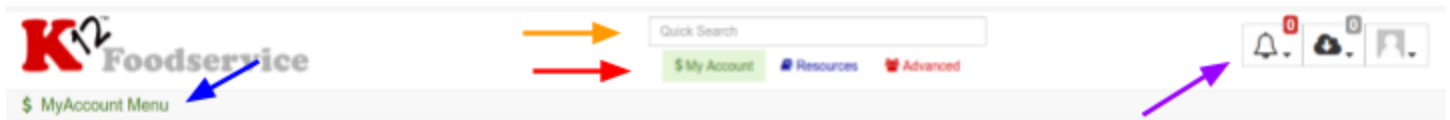
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# Introduction

Welcome to the K12foodservice.com website! There are a few basic elements we would like to highlight that should help you navigate the site.

The site has four main navigation elements that allow you to quickly find your information. The “Quick Search” (**Orange Arrow in Image 1.1**), “Notification and Report Queue” (**Purple Arrow in Image 1.1**), “Section Selector” (**Red Arrow in Image 1.1**) and the “Section Menu” (**Blue Arrow in Image 1.1**). We will review each of these in more detail throughout this document.

Image 1.1



The site allows users to have access to more than one Recipient Agency (School District) with a single username. If you currently have multiple usernames, please contact K12 Customer Support to have your accounts combined.

(571) 409-6560

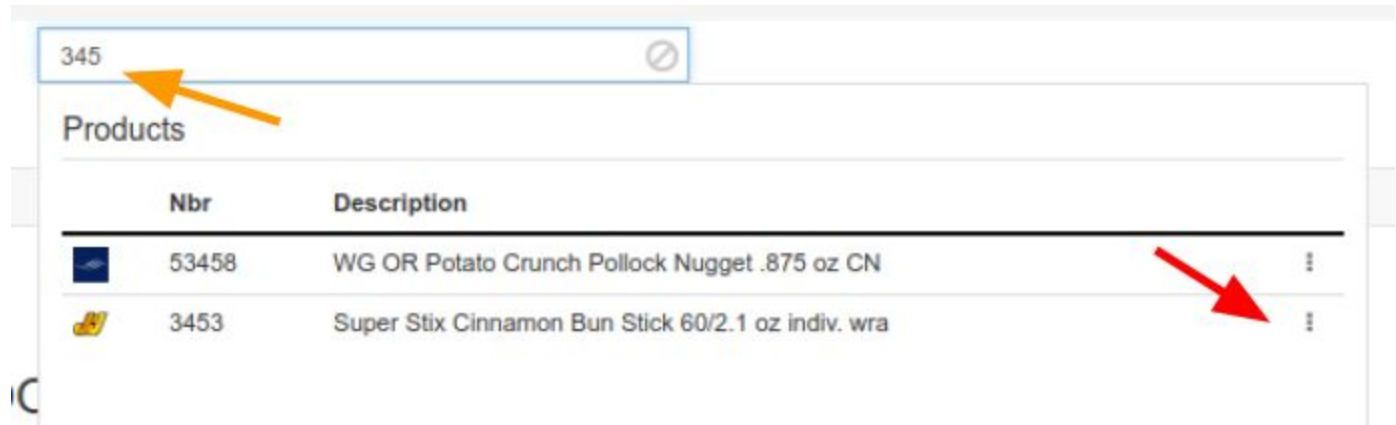
info@k12servicesinc.com

# Quick Search

(Orange Arrow in Image 1.1)

The “Quick Search” allows for easy searching of manufacturer products. A search will be performed, on product name and number, as soon as three characters have been entered in the search box (Orange Arrow in Image 1.1 & 2.1). Clicking on the stacked dots to the right of the product name (RED Arrow in Image 2.1) expands to show the current pass through values (PTV), more product information is available on the “Product PTV” page in the [Resources Section](#) of the site.

Image 2.1



# Notification & Report Queue

(Purple Arrow in Image 1.1)

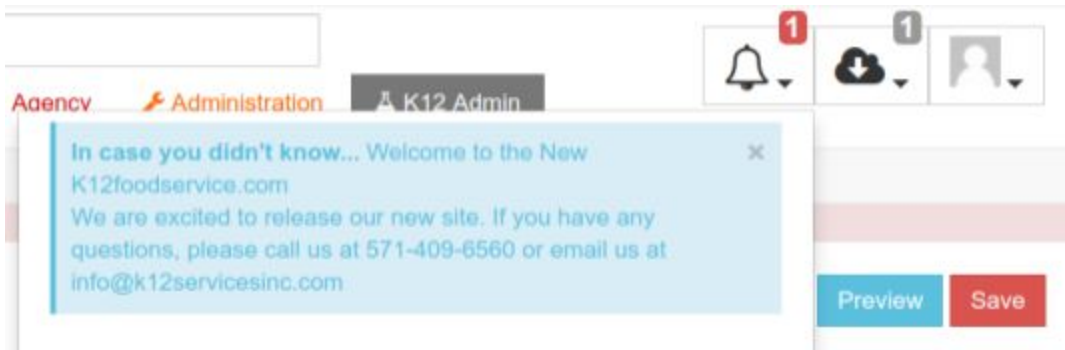
The upper right corner of the site contains three features (Image 3.1): “Notification Queue” (Alarm), “Report Queue” (Download Cloud), and “Site Settings” (Person) which allows easy access to updates, reports, and site settings.

Image 3.1



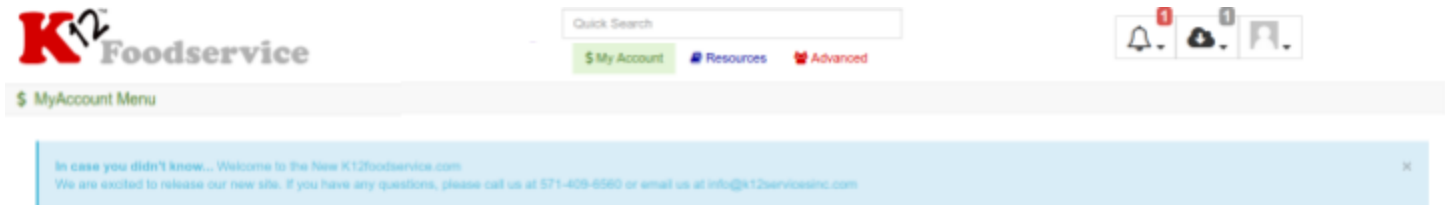
The “Notification Queue” will be the central destination for all communications from K12 Services, Inc. along with postings generated by the K12foodservice.com website. The “Notification Queue” will show general postings, new features, distributor change request status, along with other notification types as the site matures.

Image 3.2



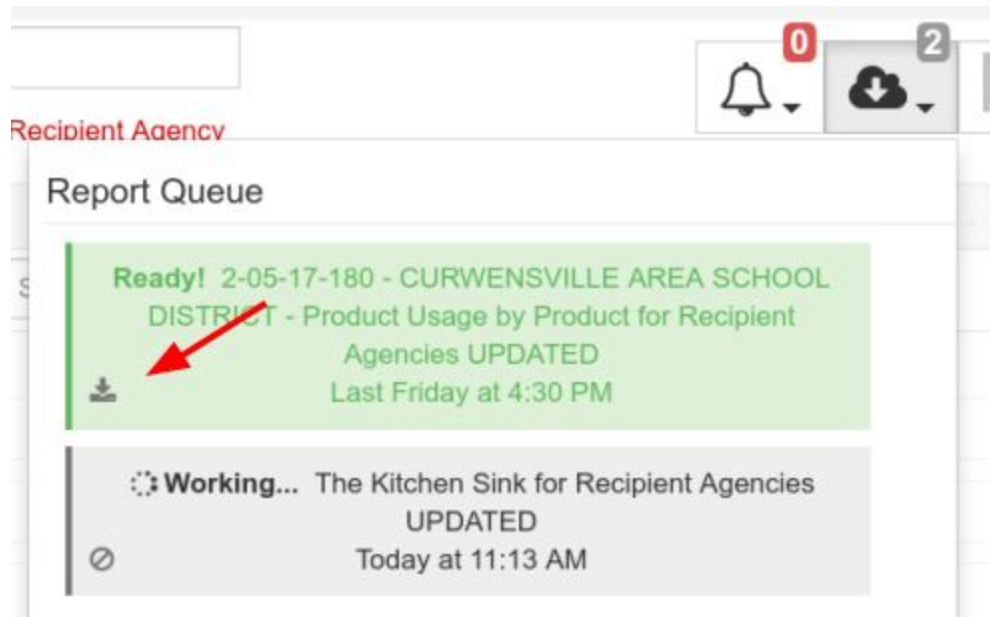
Notifications may also show on each of the Section Menu pages.

Image 3.3



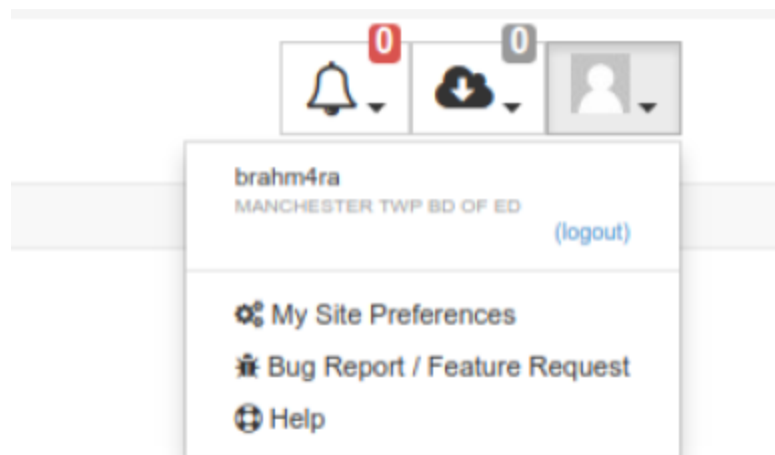
The "Report Queue" will show the status of the reports requested and present the option to download a completed report (**RED Arrow** in Image 3.4).

Image 3.4



The "Site Setting" allows the user to update their user information and also submit Bug Reports or Feature Requests.

Image 3.5



# Section Selector

(Red Arrow in Image 1.1)

The site is separated into three sections: **My Account**, **Resources**, and **Advanced**. Each Section has its own menu that can be reached by clicking on the appropriate Section selector (Red Arrow in Image 1.1) at the top center of the website.

The three sections of the website have a specific focus. The **My Account** section, is designed to allow broad, quick views of your account(s) information (Account Overview, Balance Overview, etc.) and administrative responsibilities (Distributor Overview).

The **Resources** Section is designed for general information and reporting, at this time there are two menu options, "Product PTV" and the "Report Catalog".

And finally the **Advanced** Section allows for advanced filtering of your "Account Balance", "Transaction Summary", "Product Usage", "Monthly Usage" and "Contact Info". We will review this section in more detail later in this document.

After selecting the Section (Blue Arrow in Image 4.1), **My Account** in our example, you are presented with that Section's menu (Red Arrow in Image 4.1). Each Section has its own menu options associated with that Section's designed functionality.

Image 4.1

The screenshot shows the K12 Foodservice website interface. At the top, there is a navigation bar with the K12 Foodservice logo on the left, a search bar, and three menu options: "My Account" (highlighted with a blue arrow), "Resources", and "Advanced". Below the navigation bar, there is a "MyAccount Menu" section. On the left side, there is a sidebar menu with options like "Balance Overview", "Summary Overview", "Account Balance", "Monthly Usage", "Product Usage", "Transaction Summary", and "Contact Info". The main content area displays account information for "2-05-17-500 MOSHANNON VALLEY SCHOOL DISTRICT (PA)". It includes a table for "Account Balance" for the year 2015-16, showing commodity details such as "100443 OIL VEGETABLE-BULK" and "USDA Commodities Total". Below the table, there is a section for "CONAGRA FOODSERVICE" with details about regional brokerage and distributors.

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100443 OIL VEGETABLE-BULK	260,000	123.48	0.000	0.00	260,000	123.48	0	0
USDA Commodities Total	1,539,070	689.19	-679,070	-423.11	560,000	266.08	64	0
Manufacturer Allowance Total			0.000	0.00				

# My Account Section

The **My Account** section is designed to allow quick access to your commodity program. Many of the menu options in the **My Account** Section will have a corresponding menu option under the **Advanced** Section for convenience and to allow other levels of access to have the same reporting as a recipient agency.

Image 5.1

The screenshot displays the 'My Account' interface for a user. At the top, there is a navigation bar with the K12 Foodservice logo, a search bar, and links for 'My Account', 'Resources', and 'Advanced'. Below this is a 'MyAccount Menu' section. The main content area shows the account details for '2-05-17-500 MOSHANNON VALLEY SCHOOL DISTRICT (PA)'. On the left, there are filters for 'RA' (MOSHANNON VALLEY SD), 'Manufacture' (14 of 14 selected), and 'School Year' (2015-16). The 'Account Info' sidebar lists options like Balance Overview, Summary Overview, Account Balance, Monthly Usage, Product Usage, Transaction Summary, and Contact Info. The 'Account Mgmt' sidebar lists Distributor Assignment and Order Mgmt. The main content area is titled 'Account Balance' for the year 2015-16. It features three manufacturer cards: CAINS, CONAGRA FOODSERVICE, and HighLiner Foods. Each card shows the manufacturer's logo, regional brokerage and coop information, and distributor details. Below the CAINS card is a table with the following data:

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100443 OIL VEGETABLE-BULK	280.000	123.48	0.000	0.00	280.000	123.48	0	0
USDA Commodities Total	1,538.070	688.19	-979.070	-423.11	560.000	266.08	64	0
Manufacturer Allowance Total			0.000	0.00				

Below the table, there is a yellow banner that says 'Needs Up! No activity'. The bottom of the page shows the HighLiner Foods manufacturer card.

“**Balance Overview**” can be found in both the **My Account** Section and **Advanced** Section, and shows a concise list of commodities and their balances for all of your manufacturers.

“**Summary Overview**” can be found in both the **My Account** Section and **Advanced** Section. The “Summary Overview” will show a general summary of all commodities and manufacturers, if you have access to multiple recipient agencies the “Summary Overview” will combine all your commodity accounts allowing a view of your entire commodity program. The “Summary Overview” in the **Advanced** Section has the same layout, but is specific to the recipient agency selected.



# Account Balance

(*My Account* & *Advanced* Section)

The “Account Balance” option is one of the central pages for managing your commodity program. There are too many items to review all of them in this document, but we will highlight some of the more important aspects of the page.

The “Account Balance” page shows three different percentages. Each percentage highlights a different level of usage. The percentage to the right of the manufacturer’s logo (*Orange Circle in Image 6.1*) represents the usage percentage for all the commodities for that specific manufacturer. Lastly, there is a usage percentage for each specific commodity (*Green Circle in Image 6.1*).

Each percentage is color coded based on performance. If the account is on track the percentage will be green, if it is falling behind it will show orange, and if it is substantially behind the target for the month, it will be in red.

The “Account Balance” contains a lot of information, from contact and distributor information to your commodity balances. Each manufacturer is shown separately, to the right of the manufacturer’s logo are important contacts and your current distributing agent(s). Simply click on any underlined value to show additional information. Commodity information is listed below, showing the commodity code and description, your allocation in pounds (*Red Arrow in Image 6.1*) and dollars, usage in pounds (*Green Arrow in Image 6.1*) and dollars, balance in pound and dollars, and each commodities percentage of use and its months on hand (*Purple Arrow in Image 6.1*).

Image 6.1

RA  
MANCHESTER TWP BD OF ED

02902940 MANCHESTER TWP BD OF ED (NJ)

Manufacturer  
11 of 14 selected

School Year  
2015-16

Account Info  
 - Balance Overview  
 - Summary Overview  
 - Account Balance  
 - Monthly Usage  
 - Product Usage  
 - Transaction Summary  
 - Contact Info

Account Mgmt  
 - Distributor Assignment  
 - Order Mgmt

**Account Balance**  
2015-16

**HIGHLINER FOODS** Regional: Dawn Cross (NY/PA/VT - Plymouth Meeting) Distributors: PFG - AF ACTIVE **4%**  
 Brokerage: COOP NONE Mgmt Co: SODEKO

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100892 FISH AK PLOK PRZ BULK CTN-40 LBS	300,000	446.60	-13,000	-16.79	286,000	427.81	4	255

**JJ FLOUR** Regional: Dawn Cross (NY/PA/VT - Plymouth Meeting) Distributors: DIRECT SHIP / NONE ACTIVE 100%  
 Brokerage: COOP NONE Mgmt Co: SODEKO

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100420 FLOUR BAKER HEARTH UNBLCH-BULK	36,900	9.15	-36,900	-9.16	0,000	-0.01	100	0
100421 FLOUR BAKER SOFT UNBLCH-BULK	0,000	0.00	0,000	0.00	0,000	0.00	0	0

**Jennie-O** Regional: Alex Woods (ADVANTAGE MARKETING) Distributors: PFG - AF ACTIVE 88%  
 Brokerage: COOP NONE Mgmt Co: SODEKO Customer Nbr: 3026

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100124D TURKEY CHILLED -BULK	1,200,000	1,177.96	-850,431		350,529			2
100124R TURKEY CHILLED -BULK	1,216,040	1,423.96	-1,106,469		107,572			1
JTS JTS Allocation			-400,877					

ORD -850,431 / 0  
 ORD-REB 0  
 ORD-CDT 999.91  
 ORD-ADJ 0.00

Average Monthly Usage: -850,431 / 3  
**-94**

Months On-Hand: 2  
 Balance / Average Monthly Usage: 155,529 / -94

**JMM** Regional: Lisa Pines (ACOSTA SALES AND MARKETING - NEW JERSEY) Distributors: DIRECT SHIP / NONE ACTIVE 100%  
 Brokerage: COOP NONE Mgmt Co: SODEKO Customer Nbr: 3425

Commodity	Allocation LBS	Allocation \$	Usage #	Usage \$	Balance LBS	Balance \$	%	MOH
100104 BEEF COARSE GROUND PRZ CTN-40 LB	3,313,680	9,474.81	-3,313,680	-9,474.67	0,000	0.14	100	0
100193 PORK PICNIC BNLS PRZ CTN-40 LB	483,300	743.61	-483,300	-743.56	0,000	0.03	100	0
100883 TURKEY THIGHS BNLS SKINS CHILLED-BULK	41,400	69.66	-41,400	-69.66	0,000	0.00	100	0
110138 PORK BONELESS LEG ROAST	134,250	229.54	-134,250	-229.55	0,000	-0.01	100	0
CHS UNIVERSAL CHEESE BARK	91,420	171.67	-91,420	-171.09	0,000	-0.02	100	0

# Monthly Usage

(My Account & Advanced Section)


The “Monthly Usage” shows usage in Pounds or Dollars by Invoice Date for each month of the selected school year. The page can show Pound or Dollar values based on the value selected (*Orange Arrow in Image 7.1*)

Image 7.1

02902940 MANCHESTER TWP BD OF ED (NJ)

## Monthly Usage

2015-16



Regional: Dean Enos  
 Brokerage: WWPPOINT - Plymouth Meeting  
 COOP: NONE  
 Mgmt Co: SODEXO

Distributors: PFG - AFI  
 ACTIVE


4%

#

\$

←

108892 FISH AK PLCK FRZ BULK CTN-49 LBS	Allocated Pounds												309,000	Balance Pounds		296,000
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total			
Usage #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	-13.000	0.000	0.000	0.000	0.000	-13.000			
ADJ #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
TFR #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
Usage %	0%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%			4%



Regional: Dave Straley  
 Brokerage: ADVANTAGE MARKETING  
 COOP: NONE  
 Mgmt Co: SODEXO

Distributors: DIRECT SHIP / NONE  
 JAMAC FROZEN FOOD  
 PFG - AFI  
 ACTIVE  
 ACTIVE  
 ACTIVE

100%

#

\$

108429 FLOUR BAKER HEARTH UNBLCH-BULK	Allocated Pounds												36,960	Balance Pounds		0.000
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total			
Usage #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	-36,960	0.000	0.000	-36,960			
ADJ #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
TFR #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	100.000	0.000	0.000	-63,040	36,960			
Usage %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			0%

108421 FLOUR BAKER SOFT UNBLCH-BULK	Allocated Pounds												0.000	Balance Pounds		0.000
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total			
Usage #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
ADJ #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
TFR #	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	100.000	0.000	0.000	-100.000	0.000			
Usage %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			0%

# Product Usage

(My Account & Advanced Section)

The "Product Usage" shows products purchased either by month or school year and the breakdown by commodity. The top line shows the total case of that product purchased, the grey lines show the number of cases receiving the specific commodity (**Red Box in Image 8.1**). In our example 23 cases were purchased, but only 4 received 100103W.

Image 8.1

2-05-17-500 MOSHANNON VALLEY SCHOOL DISTRICT (PA)

Product Usage  
2015-16

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun **All**

Product	Cases	Case Wt	Usage #	Usage \$
<b>Peterson farms fresh</b>				
Regional Brokerage: JENNIFER RAIGS		Distributors: REINHART - PITTSBURGH		ACTIVE
COOP: NONE				
Mgmt Co: THE NUTRITION GROUP				
210995 - Fresh Sliced Apples 2 oz	25	312.900	-481.000	-201.25
110149 - BULK APPLES FOR PROCESSING	25	312.500	-481.000	-201.25 100%
<b>Totals</b>	<b>25</b>	<b>312.9000</b>	<b>-481.0000</b>	<b>-201.25</b>
<b>Tyson</b>				
Regional Brokerage: PAMELA CARTER		Distributors: JAMAC FROZEN FOOD		ACTIVE
COOP: NONE				
Mgmt Co: SODEXO				
062154-0928 - WHL GRAIN PAT CN	23	708.400	-169.940	-161.24
100103D - CHICKEN LARGE CHILLED -BULK	23	708.400	-154.790	-137.88 100%
100103W - CHICKEN LARGE CHILLED -BULK	4	123.200	-35.160	-33.36 17%
062135-0928 - CN FC BRD CKN CHNK	15	425.250	-113.210	-107.37
100103D - CHICKEN LARGE CHILLED -BULK	15	425.250	-80.850	-76.65 100%
100103W - CHICKEN LARGE CHILLED -BULK	4	113.400	-32.360	-30.72 26%
062340-0928 - WHL GRAIN HMST PPN CKN	10	300.000	-130.900	-124.26
100103D - CHICKEN LARGE CHILLED -BULK	10	300.000	-100.700	-95.60 100%
100103W - CHICKEN LARGE CHILLED -BULK	2	60.000	-30.200	-28.66 20%
070362-0928 - WHL GRAIN CKN CHNK CN	5	150.000	-163.700	-155.35
100103W - CHICKEN LARGE CHILLED -BULK	5	150.000	-163.700	-155.35 100%
070367-0928 - WHL GRAIN CSPY STCK CN	4	126.000	-41.360	-39.26
100103D - CHICKEN LARGE CHILLED -BULK	4	126.000	-23.640	-22.44 100%
100103W - CHICKEN LARGE CHILLED -BULK	2	63.000	-17.720	-16.82 50%
<b>Totals</b>	<b>57</b>	<b>1,709.6500</b>	<b>-609.0600</b>	<b>-610.05</b>

# Transaction Summary

(My Account & Advanced Section)

“Transaction Summary” displays the transactional activity of your account. You may navigate through transactions month by month or click on the calendar icon (Red Arrow in Image 9.1) and enter a specific time period. Clicking on DF LBS or PTV \$ (Blue Arrow in Image 9.1) will show a break out of the discount by commodity. Clicking on the row will expand to show further transaction details. To close; simply click the row again.

Image 9.1

## 2-05-17-500 MOSHANNON VALLEY SCHOOL DISTRICT (PA)

**Transaction Summary**  
07/01/2015 - 06/30/2016

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun

07/01/2015 06/30/2016 Submit

Export

Page 1 of 1

Manuf	Type	Distributor	Date	Inv Nbr	Prod Nbr	Description/Memo	Case Qty	Total Wt	DF LBS	PTV \$
TFR	DIRECT SHP / NONE		07/01/2015		100332	SY15/16 Allocations, Jc		000	500.00	\$ 7.80
DEP	DIRECT SHP / NONE		07/10/2015		110149	New SY 15-16 Allocations		000	350.000	\$146.47
COV	DIRECT SHP / NONE		07/30/2015		100443	Carry Over		000	300.000	\$142.47
COV	DIRECT SHP / NONE		08/02/2015		100420	Carry Over		000	370.640	\$91.81
COV	DIRECT SHP / NONE		08/07/2015		100443	Carry Over		0.000	224.100	\$106.43
TFR	DIRECT SHP / NONE		08/07/2015		100443	Setup 2015-2016 School Banks (based on '14-'15 usage)		0.000	35.900	\$17.05
ORD	REINHART - PITTSBURGH		09/29/2015	PIT136469	RPKMASC	SPAGHETTI SAUCE 6#10 CANS	1	39.750	-10.670	\$-4.75

Detail: [Product EPOS](#) [Contacts](#)

**Account**

RA: MOSHANNON VALLEY SCHOOL DISTRICT

RA Nbr: 2-05-17-500

Manuf Nbr:

Cust Nbr:


COOP: NONE

Mgmt Co: THE NUTRITION GROUP

**MPR**

MPR ID: 4114

Month: 09-2015



Product: RPKMASC SPAGHETTI SAUCE 6#10 CANS

Dist Stock Nbr: RPKMASC06

Case Qty: 1

Case Wt: 39.750000

Commodity	DF LBS	PTV \$
100332 - TOMATO PASTE FOR BULK PROCESSING	-10.670	\$ -4.75
<b>Total:</b>	<b>-10.6700</b>	<b>-4.75</b>

**Invoice Info**

School Name: MOSHANNON ELEMENTARY

Address: 5026 GREEN ACRE RD

City: HOUTZDALE

State: PA

Zip: 16051

Distributor: REINHART - PITTSBURGH

Creation Date: 09/29/2015

Invoice Date: 09/29/2015

Invoice Nbr: PIT136469

Dist Cust Nbr: 53216

Memo

# Distributor Assignment

(My Account Section & Advanced Section)

There are two places that a recipient agency can review and request a change to their distributor assignments. The first is from the My Account Section, there is a link on the My Account Section menu that allows quick access to the distributor assignments titled "Distributor Overview". This link is available only to recipient agencies. Brokers, CO-OPs and Management Companies (as well as Recipient Agencies) have access to make distributor change requests through the Advanced Section under each specific school (Orange Box in Image 8.1). There are three options for requesting a distributor change.

The most common is replacing an existing distributor with a new one. (Orange Arrow in Image 10.1) This will prompt for the new distributor and the date replacement should take effect. This process will notify the current distributor of the termination and notify the new distributor of the effective date.

The second option allows for additional distributors (multiple distributors) to be assigned to the account simultaneously (Green Arrow in Image 10.1). The prompt will ask for the additional distributor and the date the distributor would take effect. The addition of a new distributor takes effect on the day requested or the day after its approval by the manufacturer if the requested date has passed.

Lastly, the option to terminate (Red Arrow in image 10.1) a distributor is available if there are multiple distributor currently active

Image 10.1

The screenshot displays the 'Distributor Overview' interface. At the top left is the 'J & S Snack Foods' logo. Below it is a table of active distributors:

Distributor	Start Date	Termination Date	Status
PFG - AFI	10/05/2013	05/24/1963	Active
JAMAC FROZEN FOOD	05/27/2015	05/24/1963	Active
DIRECT SHIP / NONE	07/01/2016	05/24/1963	Active

Each row has 'Replace' and 'Terminate' buttons. A 'Request a new Distributor' button is at the bottom right. Three modal windows are shown:

- Top Left:** 'Select the distributor replacing PFG - AFI'. It has a dropdown for 'New Distributor' (set to 'A and R FOOD DISTRIBUTOR') and a 'Replace Date' field (set to '05/19/2017').
- Bottom Left:** 'Select the date you want to terminate distribution from PFG - AFI'. It has a 'Termination Date' field (set to '05/19/2017').
- Bottom Right:** 'Select the new distributor and its start date'. It has a dropdown for 'New Distributor' (set to 'A and R FOOD DISTRIBUTOR') and a 'Start Date' field (set to '05/19/2017').

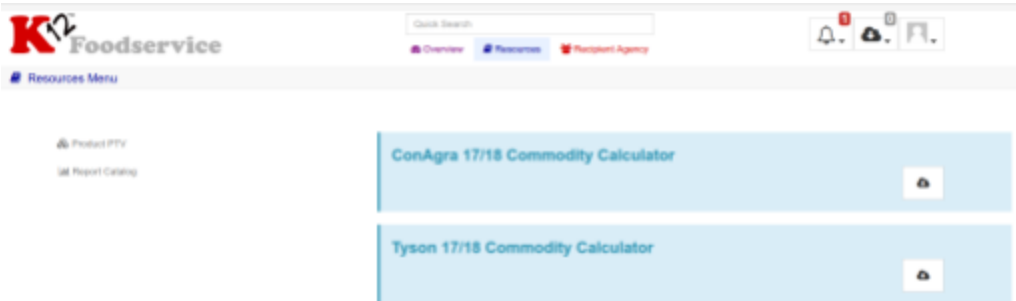
On the right side, there are three notification boxes:

- Blue: 'In case you didn't know... Distributor Change Requested' for PFG - AFI.
- Green: 'eSIS Distributor Change Requested Approved' for A and R FOOD DISTRIBUTOR.
- Red: 'Heads Up! Distributor Change Requested Declined' for A and R FOOD DISTRIBUTOR.

# Resources Section

The **Resources** Section allows access to Product Information and Reporting, along with various resources shared by the manufacturer.

Image 11.1



After selecting an option from the "Resources Menu", a new Section Tab (**Green Arrow in Image 4.2**) is created with the title of your selection (i.e. "Summary Overview").

Image 11.2

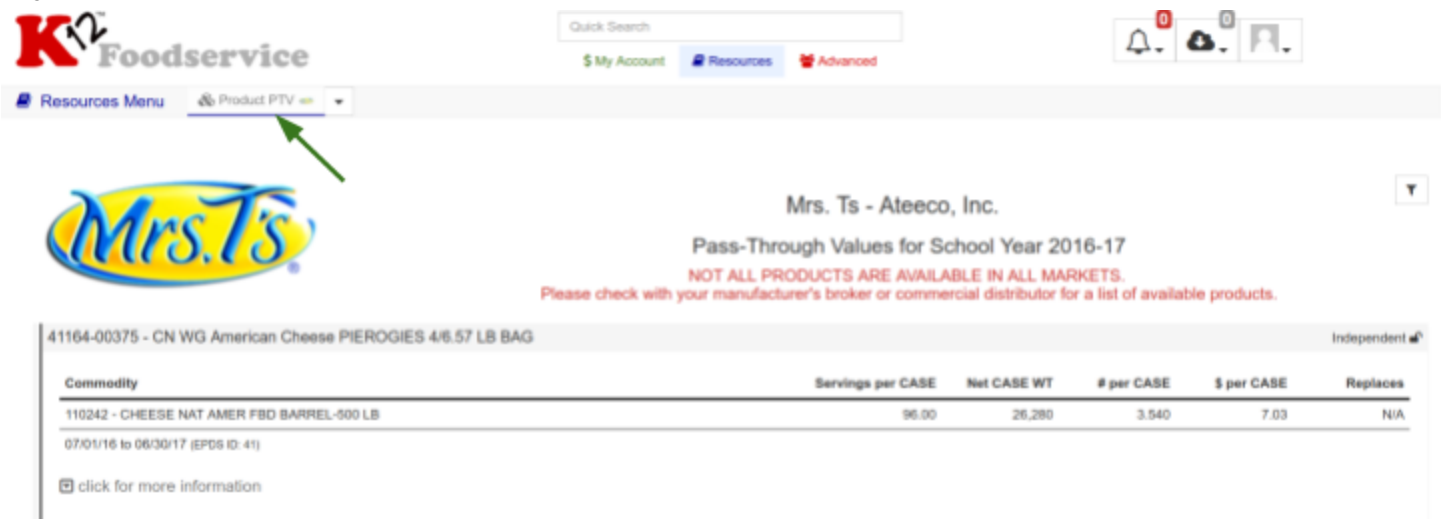
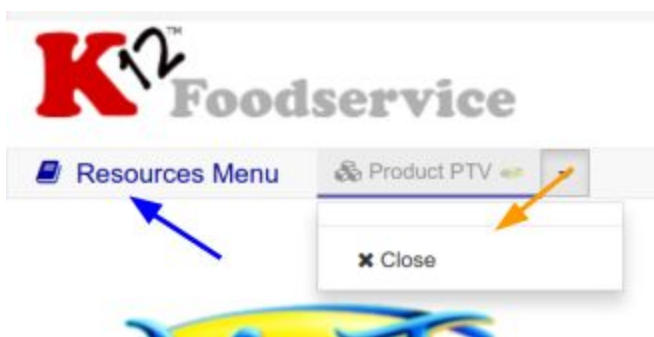


Image 11.3



Each of the Section's Tabs will remain until they are closed (**Orange Arrow in Image 4.3**)--even after logging out.

You can return to the "Overview Menu" at any time by clicking on the section menu link (**Blue Arrow in Image 4.3**) in the upper left corner of the site.

Each section's navigation works in the same manner.

Image 11.4

Selecting “Product PTV” will prompt you to select the Manufacturer you wish to view (*Image 6.2*). You can double click on a manufacturer's logo or select the manufacturer and click continue at the bottom of the list.

Upon selection of a manufacturer, a new tab will be created listing all the eligible products for the selected manufacturer (*Image 6.3*) and their current pass through values. Each product's name and manufacturer product number is displayed (*Red Arrow in Image 6.3*) along with the commodity ingredients contained (*Orange Arrow in Image 6.3*). Additionally the amount of each commodity, in pounds (*Blue Arrow in Image 6.3*), and the commodity's approved discount or “PTV” (*Green Arrow in Image 6.3*) per case or pound are shown.

Image 11.5

Quick Search

My Account Resources Advanced

Resources Menu Product PTV

**Mrs. Ts**

Mrs. Ts - Ateeco, Inc.

Pass-Through Values for School Year 2016-17  
**NOT ALL PRODUCTS ARE AVAILABLE IN ALL MARKETS.**  
 Please check with your manufacturer's broker or commercial distributor for a list of available products.

Commodity	Servings per CASE	Net CASE WT	# per CASE	\$ per CASE	Replaces
41164-00375 - CN WG American Cheese PIEROGIES 4/6.57 LB BAG					Independent
110242 - CHEESE NAT AMER FBD BARREL-500 LB	96.00	26,250	3,540	7.03	N/A
07/01/16 to 06/30/17 (EPoS ID: 41)					
<a href="#">click for more information</a>					
41164-00376 - HIGH PROTEIN CN WG American Cheese PIEROGIES 4/7.06 LB BAG					Independent
110242 - CHEESE NAT AMER FBD BARREL-500 LB	96.00	26,250	5,220	10.37	N/A
07/01/16 to 06/30/17 (EPoS ID: 42)					
<a href="#">click for more information</a>					

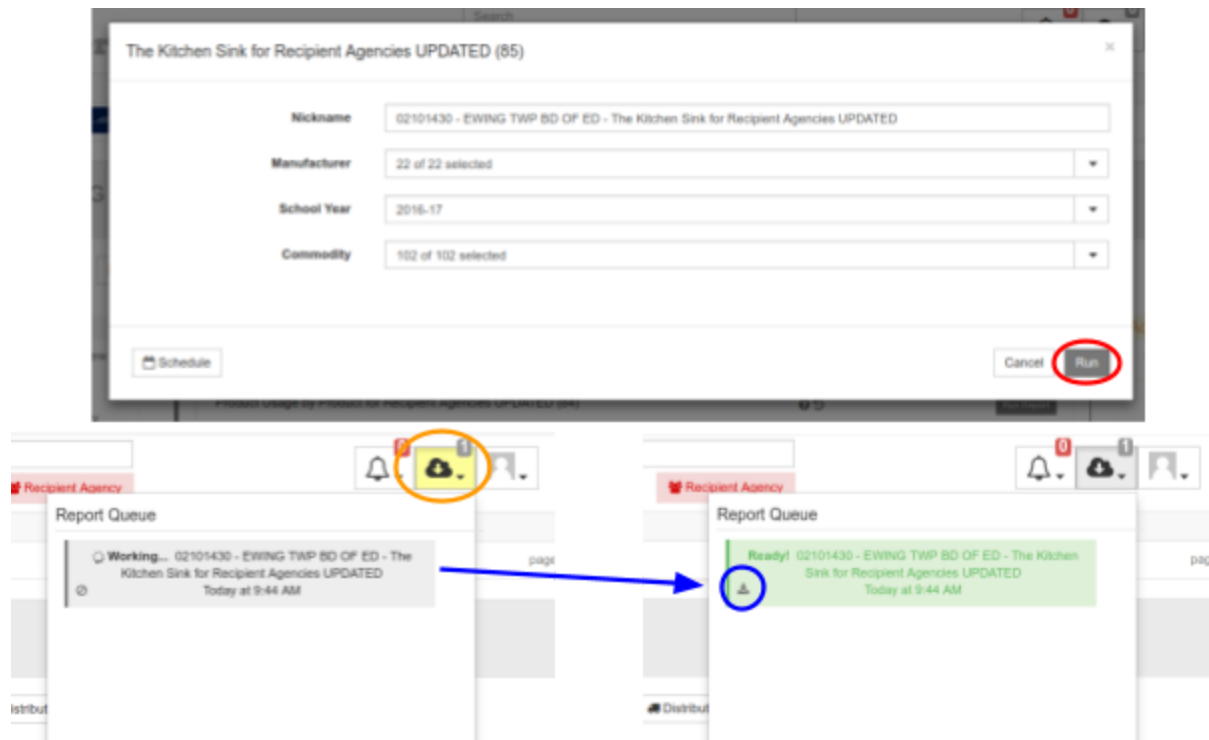


# Reporting

([Resources](#) Section & [Advanced](#) Section)

There are two locations reports can be run, the “Report Catalog” located in the “[Resources](#) Section” and the “Account Menu” (**Purple Box in Image 14.1**) in the “[Advanced](#) Section”. Many of the reports in the “Report Catalog” are also listed in the “Account Menu”, for users with access to multiple Recipient Agencies, it is best practice to use the Reports in the “Account Menu”. When a report is run, you will be prompted to select the desired criteria, and have an option to Name the Report (Nickname). When you have finished with the criteria, hit run. The report will now show in the “Report Queue” in the top right of the site.

Image 12.1



# Advanced Section

When you select **Advanced** from the Section Selector (**Red Arrow in Image 1.1**), you are presented with a search form. This form allows you to create a “RA List”. The concept allows the user to create multiple section tabs or “RA Lists” that can include one or more of your manufacturers. It allows you to create a list for last year’s account information and the current year’s information for easier analysis. If you manage multiple Recipient Agencies, this section will allow you to view all of the accounts in a “RA List” or view them each independently.

Image 13.1

The screenshot shows the 'Create New RA List' form in the K12 Foodservice application. The form contains the following fields and options:

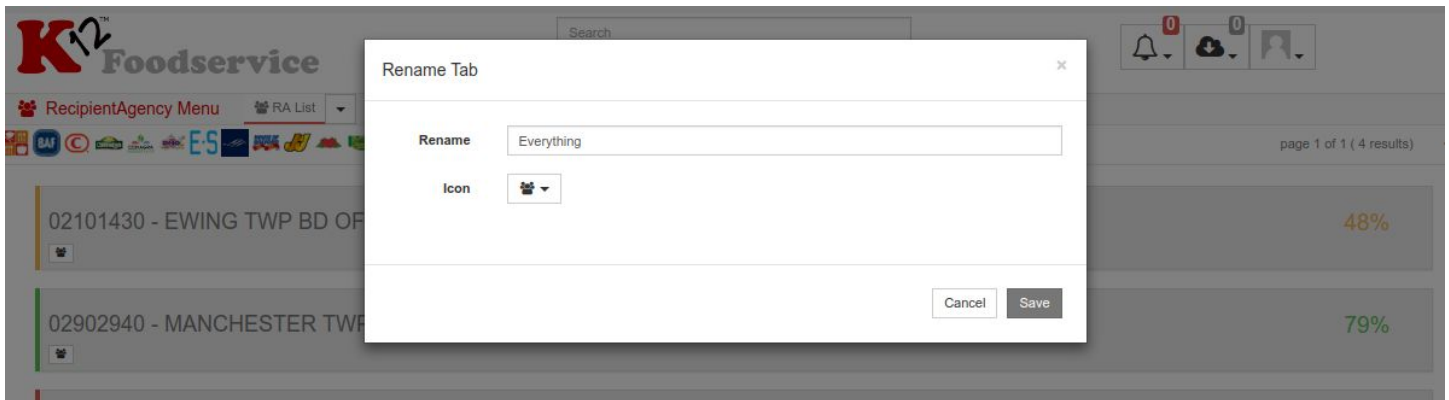
- RA: 2 of 2 selected
- Manuf Cust Nbr: [Empty text field]
- School Year: 2016-17
- Manufacturer: 14 of 14 selected
- Connectivity: 61 of 61 selected
- State: 2 of 2 selected
- Brokerage: 188 of 188 selected
- Distributor: 7 of 7 selected
- Regional: 15 of 15 selected
- COOP: 2 of 2 selected
- Mgmt Co: 2 of 2 selected
- Account Status: Active

A 'Search' button is located at the bottom of the form. A red arrow in the top navigation bar points to the 'Advanced' button, and a green arrow points to the 'Search' button.

The easiest way to become familiar with this section is to create a “RA List”. Let's show your current account information for all your manufacturers. To do this, simply click “Search” (**Green Arrow in image 13.1**) at the bottom of the search form.

You will get a prompt to “Rename Tab”, you can name it “Everything” since this “RA List” includes all your manufacturer accounts.

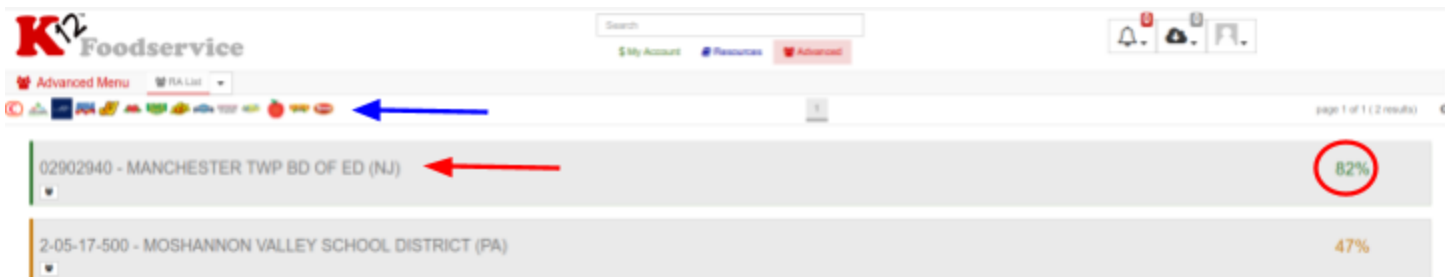
Image 13.2



Each “RA List” may have one or many manufacturer(s) represented, based on the criteria selected during the “RA List’s” creation (Image 7.1). The manufacturers are listed in the upper left corner of the tab (Blue Arrow in Image 13.3).

If you have access to multiple recipient agencies you will be presented with a list (Image 13.3), showing the Recipient Agency’s Number and Name, along with the RA’s overall usage percentage (Red Circle in Image 13.3) for the manufacturers selected. Clicking on the RA Name (Red Arrow in Image 13.3) will expand to show the “Account Menu” (Image 14.1).

Image 13.3



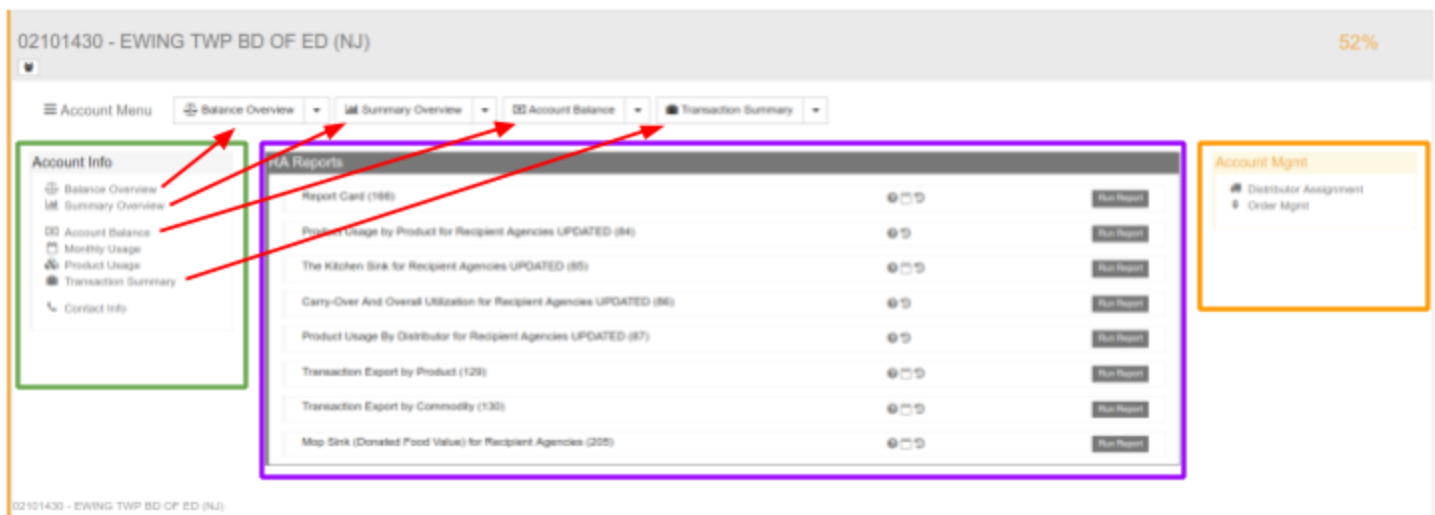
If you have access to a single recipient agency the “Account Menu” will open when the page loads (Image 8.1).

# Account Menu

(Advanced Section)

The “Account Menu” is specific to each Recipient Agency and has three sections. On the left side (**Green Box in Image 14.1**) are the standard pages: “Summary Overview”, “Account Balance”, “Product Usage”, “Transaction Summary”, “Monthly Usage” and “Contact Info”. Additionally, there are menu options for “Balance Overview” and “Summary Overview”. Each of these will open a new tab to the right of the “Account Menu” (**Red Arrows in Image 14.1**) The Center section (**Purple Box in Image 14.1**) allows for common reports to be generated for the specific Recipient Agency. Administrative options are on the right side (**Orange Box in Image 14.1**), which includes Distributor Assignment (i.e. Distributor Change Requests), covered in this document, and Online Ordering.

Image 14.1



The selection of a menu item in the “Account Info” (**Green Box in Image 8.1**) or “Account Mgmt” (**Orange Box in Image 8.1**) section will create a new Account Tab (**Red Arrow in Image 8.1**) to the right of “Account Menu”. Additionally, your focus will be switched to the selected tab. Just as with the Section Tabs, the Account Tabs will remain until closed or until the RA List is closed.

# Credential Recovery

Clicking on the “Forgot username or password” (**RED Arrow in Image 13.1**) will prompt you to enter your email address, then click “Recover Credentials”. You will be given a complete notification (*Image 13.1*) and an email will be sent the the entered email address (*Image 13.2*).

Image 15.1

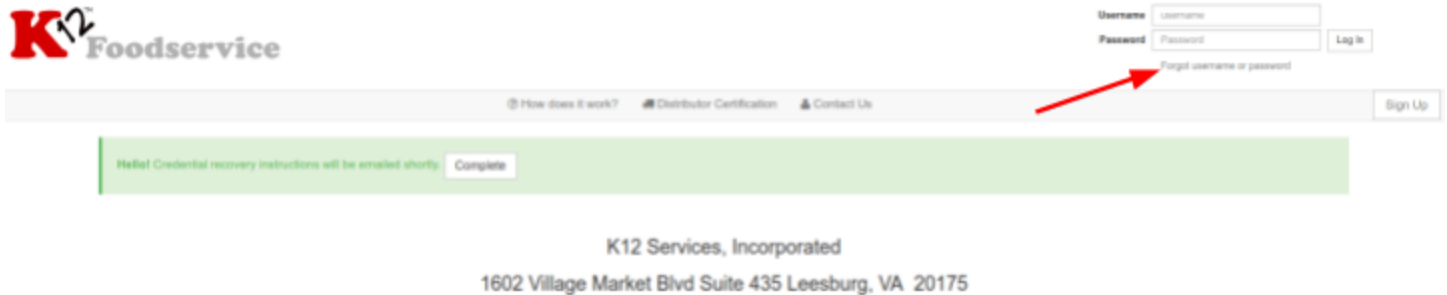
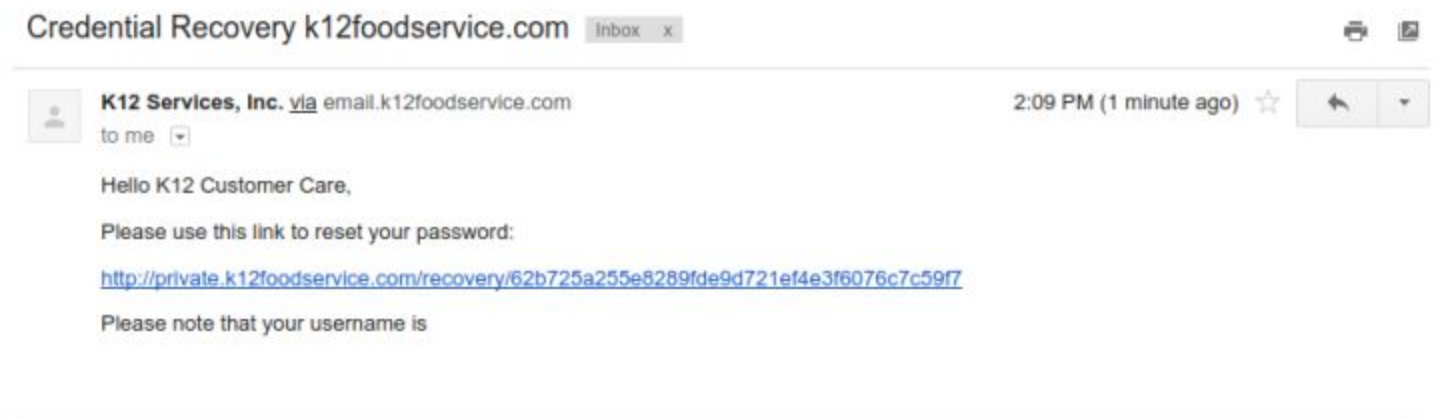


Image 15.2



Click the link in the email and you will asked to enter a new password, and to confirm (*Image 13.3*). This will be your new password for the site.

Image 15.3



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