

# *Co-op Training Presentation*



## *Agenda:*

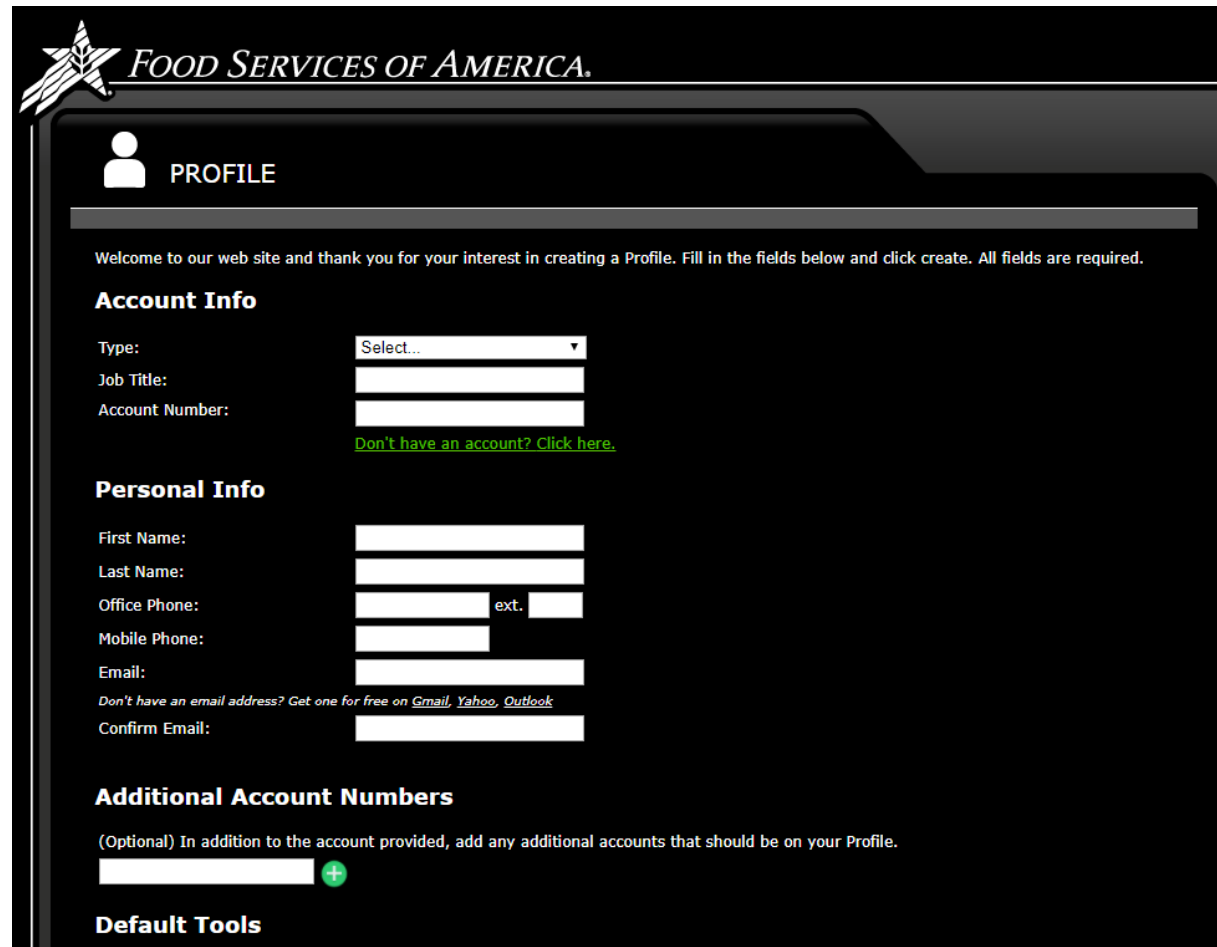
- Setting up a Profile
- Account Center
- Order Management
- Invoicing for Fresh Fruit & Veg
- Market Basket Items
- Buy American
- CN Labels / Product Formulations
- Returns and Credits
- Employee Training Program


# SETTING UP A PROFILE


WWW.FSAFOOD.COM



# FILL OUT PROFILE PAGE



 **FOOD SERVICES OF AMERICA.**

 **PROFILE**

Welcome to our web site and thank you for your interest in creating a Profile. Fill in the fields below and click create. All fields are required.

**Account Info**

Type:

Job Title:

Account Number:

[Don't have an account? Click here.](#)

**Personal Info**

First Name:

Last Name:

Office Phone:  ext.

Mobile Phone:


Email:

Don't have an email address? Get one for free on [Gmail](#), [Yahoo](#), [Outlook](#)

Confirm Email:

**Additional Account Numbers**

(Optional) In addition to the account provided, add any additional accounts that should be on your Profile.



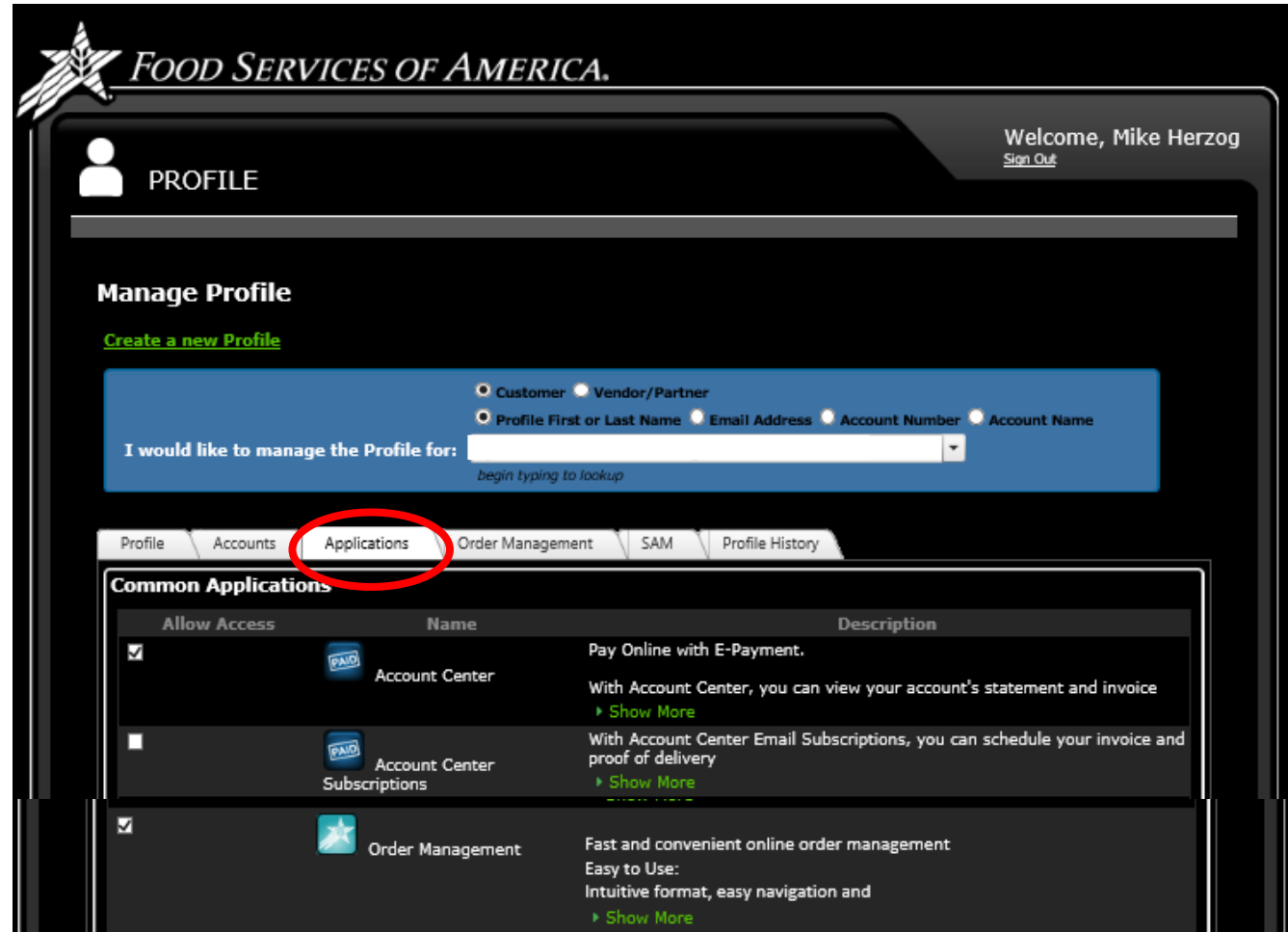
**Default Tools**

Once you receive your confirmation via email on your Profile log in and go to:

## “APPLICATIONS”

Then check –

- ✓ Account Center
- ✓ Account Center Subscriptions
- ✓ Order Management



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Welcome, Mike Herzog  
[Sign Out](#)

**PROFILE**

**Manage Profile**

[Create a new Profile](#)




☐ Customer ☐ Vendor/Partner

☐ Profile First or Last Name ☐ Email Address ☐ Account Number ☐ Account Name

I would like to manage the Profile for:  begin typing to lookup

Profile Accounts **Applications** Order Management SAM Profile History

**Common Applications**

Allow Access	Name	Description
<input checked="" type="checkbox"/>	 Account Center	Pay Online with E-Payment. With Account Center, you can view your account's statement and invoice <a href="#">Show More</a>
<input type="checkbox"/>	 Account Center Subscriptions	With Account Center Email Subscriptions, you can schedule your invoice and proof of delivery <a href="#">Show More</a>
<input checked="" type="checkbox"/>	 Order Management	Fast and convenient online order management Easy to Use: Intuitive format, easy navigation and <a href="#">Show More</a>

Then click on:

## Order Management

Flag the order options that you would like to have for this profile.



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I would like to manage the Profile for:   
begin typing to lookup

Profile Accounts Applications **Order Management** SAM Profile History

**Order Options**

- ☐ Show Bid Guides to Profile
- ☐ Hide History Guides from Profile
- ☐ Restrict Customers from Viewing AR Details
- ☐ Prevent Profile from Submitting Orders


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# ACCOUNT CENTER



# Search for Invoices and Credits up to 365 days back.

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**PAID ACCOUNT CENTER**

[Home](#) | [Invoice Search](#) | [Manage Profile](#) | [Using Account Center](#) | [FAQ](#)

**Find Account:** ☐ Account Name or Number  
**Find Profile:** ☐ Email Address ☐ Account Name or Number ☐ First or Last Name

Type to find an account:   
begin typing to lookup

**Current Activity**

Statement for:  
Credit Terms: NET 10TH  
Credit Consultant: [Lisa Dalquist](#)

Past Due: \$0.00  
Account Balance: \$1,603.49  
[Show Payments](#)

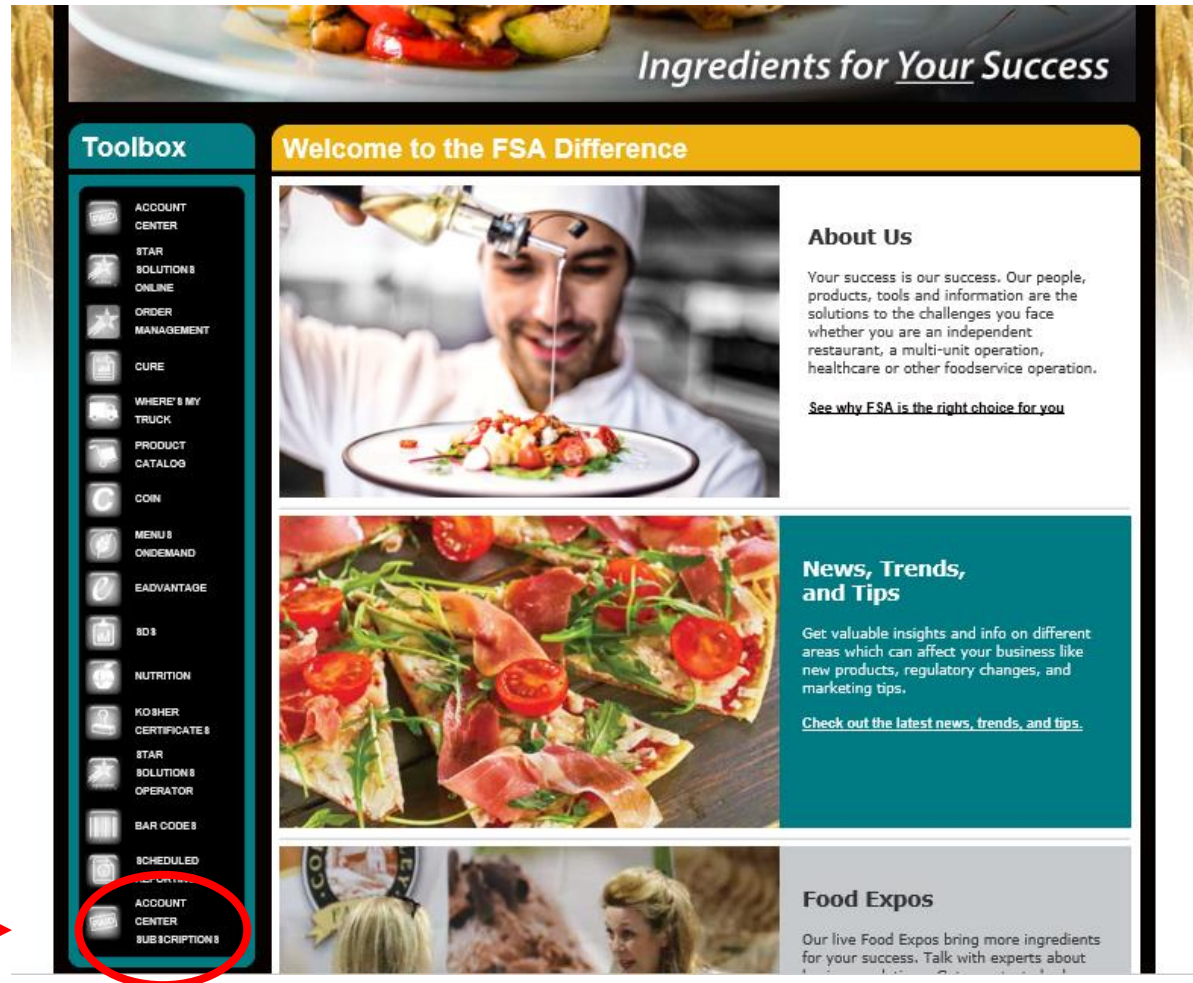
**Invoices**

Show me  invoices  4/2/2018 - 5/2/2018  [Select an action to perform.](#)

<input type="checkbox"/>	Invoice Date	Invoice Number	POD	Due Date	Payment Date	Invoice Amount	Note	Original Invoice	Customer PO
<input type="checkbox"/>	04/02/18	3255471		04/10/18	04/16/18	(\$7.81)		3252201	
<input type="checkbox"/>	04/03/18	3255878	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$3,185.22			
<input type="checkbox"/>	04/03/18	3255880	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$59.88			
<input type="checkbox"/>	04/06/18	3257953	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$2,515.49			
<input type="checkbox"/>	04/06/18	3257956	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$410.16			
<input type="checkbox"/>	04/10/18	3259392	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$1,987.03			
<input type="checkbox"/>	04/10/18	3259394	<input checked="" type="checkbox"/>	05/10/18	04/16/18	\$117.70			
<input type="checkbox"/>	04/13/18	3261609	<input checked="" type="checkbox"/>	05/10/18	04/26/18	\$1,446.33			
<input type="checkbox"/>	04/13/18	3261610	<input checked="" type="checkbox"/>	05/10/18	04/26/18	\$25.55			
<input type="checkbox"/>	04/17/18	3263117	<input checked="" type="checkbox"/>	05/10/18	04/26/18	\$1,741.69			



# ACCOUNT CENTER SUBSCRIPTIONS



*Ingredients for Your Success*

**Toolbox**

- ACCOUNT CENTER
- STAR SOLUTIONS ONLINE
- ORDER MANAGEMENT
- CURE
- WHERE'S MY TRUCK
- PRODUCT CATALOG
- COIN
- MENU ON DEMAND
- EADVANTAGE
- ISO
- NUTRITION
- KOSHER CERTIFICATES
- STAR SOLUTIONS OPERATOR
- BAR CODES
- SCHEDULED DELIVERY
- ACCOUNT CENTER SUBSCRIPTIONS**

**Welcome to the FSA Difference**

**About Us**

Your success is our success. Our people, products, tools and information are the solutions to the challenges you face whether you are an independent restaurant, a multi-unit operation, healthcare or other foodservice operation.

[See why FSA is the right choice for you](#)

**News, Trends, and Tips**

Get valuable insights and info on different areas which can affect your business like new products, regulatory changes, and marketing tips.

[Check out the latest news, trends, and tips.](#)

**Food Expos**

Our live Food Expos bring more ingredients for your success. Talk with experts about...

Click on-

# Preferences

Flag the options you would like.

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PAID ACCOUNT CENTER

Welcome, Mike Herzog  
[Sign Out](#)

[Home](#) | **[Preferences](#)** | [Invoice Search](#) | [On-Demand Extracts](#) | [Manage Profile](#) | [Using Account Center](#) | [FAQ](#)

**Information**

Email notifications from Account Center will be sent to the address you have registered in your profile:

**Automated Statements**

**Schedule**

When would you like to receive your statement?

☐ Weekly on Sundays

☐ On the last day of each month

☐ On the 15th of each month

Click [here](#) to send a statement immediately.

**Automated Invoice Extracts**

**Transaction Types**

What transaction types would you like to include in your extracts?

☒ Invoices and Credits  
Choosing this option will create an extract which includes invoice and credit transactions.

☐ Credits Only  
Choosing this option will create an extract which includes only credit transactions.

**File Types**

In which file format(s) would you like to receive your extracts?

☐ CSV

☒ PDF

**Schedule**

#### Schedule

When would you like to receive your extracts?

- ☐ As soon as generated
- ☒ Send a separate email per invoice
- ☐ As a daily batch
- ☐ As a weekly batch each Sunday

Click [here](#) to send a test extract.

#### Automated Notifications

##### Notification Types

What notifications would you like to receive?

- ☒ Proof of Delivery
  - ☐ As soon as generated
  - ☐ As a weekly batch each Sunday

- ☒ Drop Ship Invoices

Choosing this option will send a drop ship invoice as soon as it's generated.

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*Order Management  
and  
Order Management Mobile*

Topics that will be covered on –

# ORDER MANAGEMENT


- How to access Order Management
- Overview of the Screens
- Notifications
- Order Guides
- Searching
- Spec Sheets for an Item
- Identifying Items on the Bid
- Placing an Order
- Critical Items
- Separating Invoices (Fruit/ Veg Program)
- Submitting an Order
- Confirmations
- Adding Items on to Orders
- Removing Items from Orders

How to get into


# **ORDER MANAGEMENT**



Go to the following website:

1. [Order.fsafood.com](https://Order.fsafood.com)
2. Login (email address and password)
3. Begin your order.



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Mike Herzog  
Culver's St, sd Empire #1123653


CSE →  
CW  
OMT  
MCS  
MBH  
Self Help


Product Catalog  
Select a category below to view related products


  
APPETIZERS


  
BAKING


  
BEEF, PORK


  
BEVERAGES


  
CEREALS

  
CHEESE

  
CHEMICALS

  
CONDIMENTS

  
DAIRY

  
DESSERTS

Help us improve

03 May 2018

PIECES  
0

EST. TOTAL  
\$0.00



# Example of Email Confirmation:

Click on this icon to  
see if you have any  
outs.



Mon 4/23/2018 10:29 AM  
Food Services of America <noreply@fsafood.com>  
Order Confirmed - MN356 LANCASTER PUB SCH (4034525) for 04/24/2018

To: Mike Herzog  
Retention Policy: Default 7 Year Permanently Delete (7 years) Expires: 4/21/2025  
If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

**Order Confirmed**

**MN356 LANCASTER PUB SCH**  
Order Number: 195149  
PO Number:

**A few things need your attention**

**Low Inventory Warning**

- #55999 - CUCUMBERS 24CT US#1

**Order Successfully Confirmed**

Below is a summary of your Order. Please use the button below to view the details.

Status: Accepted	Cases	22
Ship Date: 04/24/2018	Eaches	2
Submitted On: 4/23/2018 8:29 AM PT	Total Line Items	13
Submitted By: Darcie Keenan	<b>Est. Total:</b>	<b>\$390.46</b>

**Have additional questions about your order?**  
Please contact your Sales Associate, Tanya Reiter by email at Tanya\_Reiter@fsafood.com or by phone at +17012814463.

To manage your messages and notifications, please visit [Notification Settings](#)

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16100 N. 71st Street Suite 400  
Scottsdale, AZ 85254

# Where to find BUY AMERICAN, CN LABELS & PRODUCT FORMULATIONS

## Minnesota Schools

<https://purchasingconnection.org/contract/food-services-of-america/150/>

## North Dakota Schools

<https://www.ndesc.org/Page/396>

# CREDITS, MIS-PICKS, DAMAGED AND SPECIAL ORDERS

**Credits** – Pictures are needed to be provided for credits.

Forward the pictures on to the FSA Associate via email.

*Pictures should be of the following:*

- Photo of the issue that needs the credit.
- Photo of Lot Code and Production Date
- Photo of Pick Sticker

## **Mis-Picks –**

Contact FSA Associate via email and let them know that you received a mis-pick and let them know what the item you received was along with what the item you were supposed to get so a pick up and credit can be put in place.

# CREDITS, MIS-PICKS AND SPECIAL ORDERS

## SPECIAL ORDERS –

Contact FSA Associate via email and let them item number and brief description of the product allow with how many you need and when you need them by. They will reply back via email to confirm that the product was ordered.

**AT TIME OF DELIVERY, WE GUARANTEE 100% SATISFACTION ON ALL PRODUCTS.**

- Your FSA driver will help you verify that the number of items delivered agrees with your invoice. Any product you are not satisfied with may be returned immediately.

**AFTER DELIVERY, PRODUCT IS GUARANTEED WITHIN THESE GUIDELINES:**

Make return & credit requests within these time frames:

Fresh Meat & Fresh Seafood, Poultry and Produce.....	Same day of delivery
General Refrigerated Products and Dairy.....	48 Hours
Frozen Items, General Dry and Chemicals.....	14 days

**TEMPERATURE:**

By requesting return of perishable products, you confirm that proper temperatures have been maintained while in your possession.

- Keep perishable products in the restaurant at these temperatures:

Frozen items.....	0-10 degrees
Fresh meat .....	30-35 degrees
Most produce.....	33-42 degrees

**MEAT, POULTRY, SEAFOOD:**

- These products can only be returned in original, undamaged packaging due to USDA & HACCP regulations. You must confirm that proper temperatures have been maintained.

**CHEMICALS:**

- Treat chemical returns with extra attention. Federal HAZMAT and AHSA regulations prohibit transport of chemical products not in original packaging.

**SPECIAL ORDER/NON-STOCK ORDER ITEMS:**

Non-stock order items have been purchased especially for you. Because they cannot be resold, they are not returnable except when damaged or of questionable quality at time of delivery.

# EMPLOYEE TRAINING PROGRAM:

## Program Features –

- 12 Monthly topics.
  - 20-30 Minute training session.
  - Monthly Instructor's book contains complete information on leading a session.
  - Employee book features a pre & post-test to assess learning level.
  - Assists in compliance with federal and state regulations.
  - Continue Education Credits.
- Sign up with your FSA Associate to receive an email each month with a PDF file you can print off.



# EMPLOYEE TRAINING PROGRAM:



**January:** Food Safety – Personal Hygiene

**February:** Customer Service

**March:** Cost Control

**April:** Preventing Food-Borne Illness

**May:** The Importance of Hydration

**June:** Food Safety – Cleaning and Sanitizing

**July:** Safety First – Back Care & Lifting

**August:** Focus on Fall: Menus, Produce & Events

**September:** Nutrition Update-What's New

**October:** Food Safety – Cooking, Cooling & Reheating

**November:** Food Focus: Nutrition for Older Americans

**December:** Food Focus – Organic & Natural Foods



# Questions?

*Thank You!*



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