WHITE PAPER

CUSTOMER CASE STUDY · COMPLETE FINANCE SYSTEM

Five systems, one source of truth.

How a Florida school nutrition department consolidated labor, point-of-sale, production, and procurement into a single real-time financial platform — eliminating manual re-entry and closing the gap between operations and the books.

State
Florida

Operation
~15 schools · ~13,000 students

Relationship
Renewed multi-year customer

Published
June 2026 · FIG Finance

STATE	SCHOOLS	ENROLLMENT	STATUS
Florida	**~15**	**~13,000**	**Renewed**
K-12 school district	Multi-site operation	Students served daily	Multi-year deployment

CONTENTS

01 Executive summary

02 Background: the fragmented finance stack

03 The challenge

04 The FIG Finance solution

05 How the integrations work

06 Results & outcomes

07 Why it matters

08 Conclusion & key takeaways

EXECUTIVE SUMMARY

School nutrition departments operate one of the most financially complex enterprises in K-12 — a self-supporting food-service business that must hit federal meal-pattern requirements, manage labor against razor-thin margins, and reconcile revenue, inventory, and procurement across every campus. Yet most departments run these functions in separate, disconnected systems that never speak to one another.

This case study examines how a Florida district with roughly 15 schools and 13,000 students replaced a patchwork of standalone tools with **FIG Finance** as its complete nutrition-finance system. By integrating **Skyward** for labor, **PrimeroEdge** for point-of-sale and production, and AI invoice scanning for procurement, the district collapsed five workflows into one and gained a continuously current profit-and-loss statement — the "Middle of the House." The department renewed its FIG Finance subscription across multiple years, demonstrating durable, end-to-end value.

BACKGROUND · 01

The fragmented finance stack

A typical school nutrition program is, in effect, a mid-sized restaurant chain operating under government regulation. It serves tens of thousands of meals a day across many kitchens, employs a large hourly workforce, purchases from competitively bid prime vendors, and is expected to remain financially self-supporting on federal and state reimbursement plus à-la-carte sales. The data required to manage that business honestly — what was sold, what was produced, what was paid in labor, and what was spent on food — originates in several different systems.

In most districts those systems were never designed to integrate. Labor lives in the HR and payroll platform. Sales and production live in the point-of-sale and back-of-house system. Invoices arrive on paper from distributors and are keyed into accounting by hand. Each system holds one true piece of the picture, but no system holds the whole picture — and the work of assembling it falls to a director and a bookkeeper armed with spreadsheets.

The consequence is a finance function that is always looking backward. By the time labor reports, sales summaries, production logs, and invoices have been exported, reconciled, and rolled up into a profit-and-loss statement, the period being measured is already over.

Decisions about staffing, menu mix, and vendor spend are made on stale data, if they are made on data at all.

THE CHALLENGE · 02

Five disconnected systems, one month-late picture

The Florida district profiled here faced exactly this fragmentation. Accounts payable lived in one system, labor in Skyward, point-of-sale and production in PrimeroEdge, and awarded bid pricing in a spreadsheet maintained by hand. Producing a single, trustworthy P&L meant manually exporting from each source, normalizing inconsistent formats, and re-keying figures into a master workbook.

That process was slow, error-prone, and impossible to keep current. Specific pain points included:

- **Manual labor re-entry.** Hours captured in Skyward had to be exported and re-typed before they could be turned into a cost-per-meal figure, introducing both delay and transcription error.
- **Disconnected revenue.** Point-of-sale sales were summarized separately and reconciled to the ledger long after service, so the department could not see margin while there was still time to act on it.
- **Opaque procurement.** Invoices were coded by hand with no automated check against awarded bid pricing, so off-contract charges went unnoticed.
- **No live P&L.** Because every input arrived on a different cadence, a true profit-and-loss view was only ever assembled retrospectively — weeks after the month closed.

THE CORE PROBLEM

Each system held one true piece of the picture, but the picture only came together by hand, after the fact. The department was managing a real-time business with month-old numbers.

THE FIG FINANCE SOLUTION · 03

One platform, fully integrated

The district deployed FIG Finance as its complete nutrition-finance system, with three integrations doing the heavy lifting automatically. Rather than asking staff to assemble the picture, FIG assembles it continuously from the systems of record.

Skyward labor integration

Labor hours flow directly from Skyward into FIG Finance, powering real-time MPLH (meals per labor hour) and labor-cost analysis with no manual entry.

PrimeroEdge integration

Point-of-sale revenue feeds the P&L automatically — directly from the district's PrimeroEdge POS, back-of-house, and production.

AI invoice scanning

Invoices are scanned, coded to expense categories, and checked against awarded bid pricing as they enter the system.

Real-time P&L

AP, labor, sales, and production live in one platform with a continuously current profit-and-loss view across every site.

A. Labor that knows its own cost

Because hours arrive automatically from Skyward, FIG continuously calculates meals per labor hour and labor cost as a percentage of revenue, by site. The labor system already knows the hours; FIG turns them into cost-per-meal without anyone re-typing a number.

B. Revenue and production in step

Point-of-sale, production, and menu data flow into FIG Finance directly from **PrimeroEdge** — the district's POS and back-of-house system. Sales and production stay current with no exports and no re-keying, so the revenue side of the P&L is always live.

C. Procurement under continuous review

Scanned invoices are line-itemized, categorized into expenses, and automatically compared to awarded bid pricing. Procurement spend flows into the same ledger as everything else, closing the last manual gap in the finance stack.

PrimeroEdge POS | Skyward labor | AI invoice scanning

HOW THE INTEGRATIONS WORK · 04

From systems of record to a single ledger

The design principle behind FIG Finance is that data should be captured once, at its source, and never re-entered. Each integration connects to the system that already owns a given fact and brings that fact into a unified ledger:

- **Labor → FIG.** Skyward remains the source of truth for hours; FIG consumes them and derives MPLH and labor-cost metrics automatically.
- **Sales & production → FIG.** PrimeroEdge remains the source of truth for revenue and production; FIG keeps the P&L current from that feed.
- **Invoices → FIG.** Distributor invoices are scanned and converted into structured, coded, bid-checked expense lines.
- **FIG → the P&L.** All three streams converge into one real-time profit-and-loss view by site and district.

The result is a finance operation where the numbers maintain themselves. Staff time shifts away from data assembly and toward the analysis and decisions that actually improve the program.

RESULTS & OUTCOMES · 05

End-to-end, automatic, and proven to last

By consolidating onto FIG Finance, the district replaced five disconnected workflows with one integrated platform and a live financial picture. The outcomes are best understood as both a consolidation of systems and a change in operating cadence — from retrospective reporting to real-time management.

5→1	0	Real-time	Multi-yr
Disconnected systems consolidated into one platform	Manual labor-hour re-entry required	P&L by site and district	Renewed, sustained deployment

DIMENSION	BEFORE FIG FINANCE	WITH FIG FINANCE
Labor reporting	Manual export from Skyward, re-keyed into spreadsheets	Automatic feed; MPLH calculated continuously
Revenue visibility	PrimeroEdge summaries reconciled after service	PrimeroEdge sales feed the live P&L directly
Procurement	Invoices coded by hand, no bid check	Scanned, categorized, and bid-checked automatically
Profit & loss	Assembled weeks after month-end	Real-time, by site and district
Systems in use	Five disconnected tools	One integrated platform

The most telling outcome is longevity: the department renewed its FIG Finance subscription across multiple years. A renewed, sustained deployment is the clearest evidence that the consolidation delivered lasting operational value rather than a one-time efficiency gain.

WHY IT MATTERS · 06

Real-time finance changes what a department can do

When financial data is always current, the role of the nutrition director changes. Instead of explaining last month's results, the director can manage this month's outcome — adjusting labor where MPLH is slipping, responding to margin pressure while the menu cycle is still running, and catching procurement variance before the next order goes out.

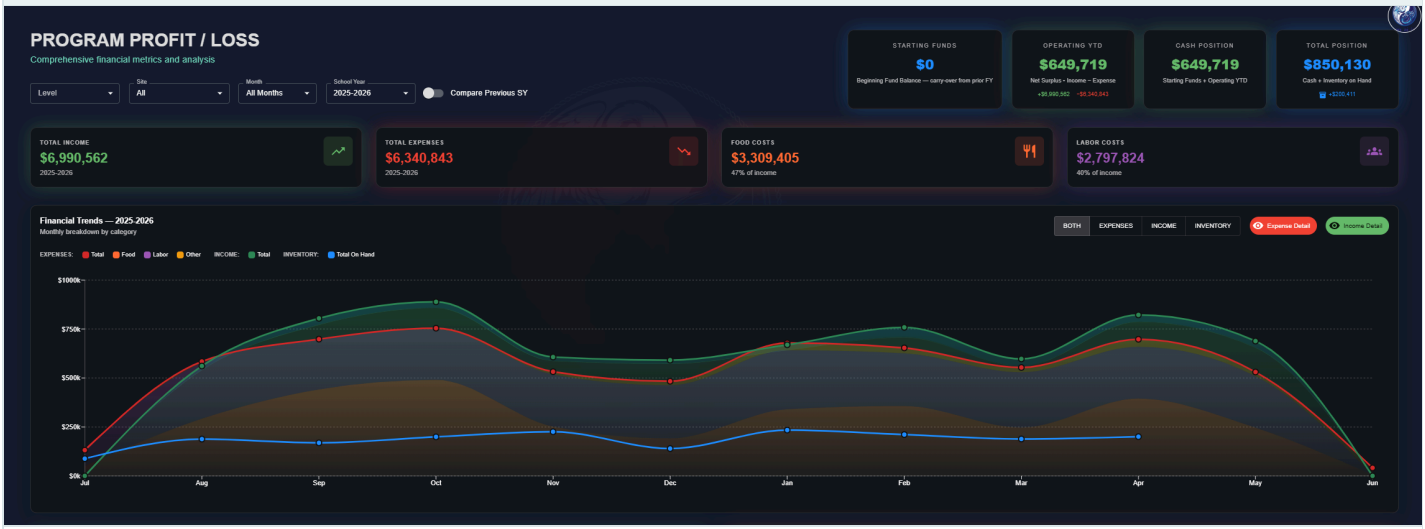
Integration also removes a category of risk that fragmented stacks quietly carry: transcription error. Every manual export and re-key is an opportunity for a number to be wrong, and wrong numbers in a self-supporting enterprise fund can compound into real

budget shortfalls. By capturing each fact once at its source, FIG Finance makes the books both faster and more trustworthy.

INSIDE THE PLATFORM

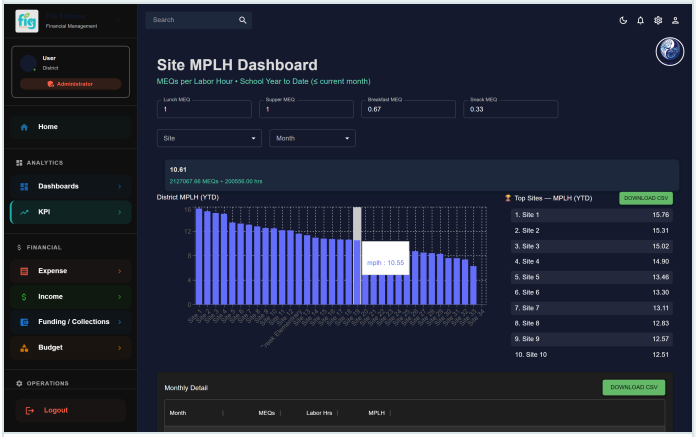
The Middle of the House, in action

FIG Finance · Program Profit / Loss



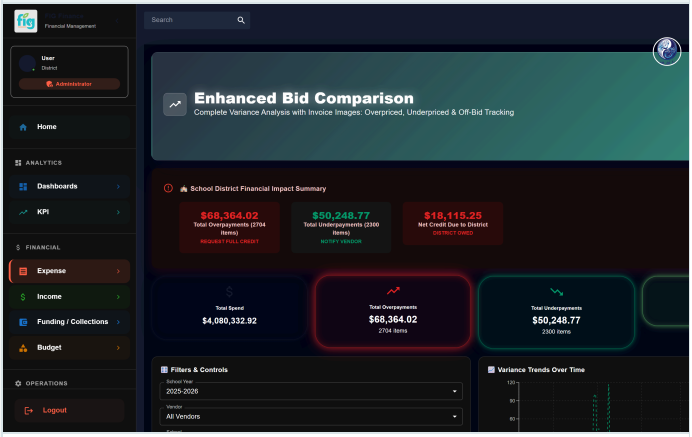
Real-time P&L dashboard — total income, expense, and the live financial trend across the year, district-wide.

FIG Finance · Labor / MPLH



MPLH analysis — fed automatically from Skyward labor hours.

FIG Finance · Invoice vs. BID



Invoice vs. bid compliance — scanned invoices checked line-by-line against awarded pricing.

CONCLUSION

One source of truth, sustained

This Florida district demonstrates what a complete nutrition-finance system looks like in practice: labor from Skyward, sales and production from PrimeroEdge, and procurement from scanned invoices captured once at their sources and unified into a single real-time ledger. The department did not simply buy software — it changed how it operates, trading after-the-fact reporting for in-the-moment management, and it has renewed that decision year over year.

KEY TAKEAWAYS

- **Consolidation is the win.** Five disconnected systems became one integrated platform with a live P&L.
- **Capture once, never re-key.** Skyward labor, PrimeroEdge sales, and scanned invoices flow in automatically.
- **Bid checking comes free.** Every scanned invoice is compared to awarded pricing as it enters the system.
- **Durability is proof.** A renewed, multi-year deployment shows the value lasts.

ABOUT FIG FINANCE

The Middle of the House for K-12 nutrition.

FIG Finance unifies POS, menus, production, labor, inventory, and bids into one real-time financial picture — so directors manage with current numbers, not month-old spreadsheets.

Anonymized customer story. District kept anonymous (state shown only); figures rounded and illustrative; no identifying details or real contacts. Integrations named (PrimeroEdge, Skyward) are third-party vendor products. © 2026 FIG Finance.