

# FLEET PROGRAM





# PROCESSING FLEET VEHICLES (NON-NATIONAL ACCOUNTS)







# **How to process a Fleet Vehicle that is attached to a Fleet Account**

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1. First, click the customer tab and select **Fleet Customer**.
  2. Next, scan the VIN. Auto Data will now search for the correct fleet account.
  3. If the VIN belongs to a fleet account in Auto Data, the screen will automatically populate the Fleet's information.
  4. Once the information is verified, enter in the mileage.
  5. The **Fleet Requirements** screen will appear for your review. Do NOT ignore this screen.

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6. On the requirements screen, start with the **Required Fleet Information** box to see if a driver has requirements (name, license plate, etc.) before building a ticket.
  7. Also, check the **Special Instructions** box in the lower left corner for unique requirements on the account.
  8. Next, view the **Authorized Services** box in the upper right-hand corner. If the customer hasn't restricted any services from their account, then it will say "ANY/ALL." If there are only specific services authorized, they will be listed in this window.
  9. Once you've reviewed the information and requirements, you can now build the ticket and conduct the service.




**What to do if the vehicle is NOT  
linked to a Fleet Account**

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1. If the system cannot find the fleet account attached to it, Click "OK" (box on the right).
  2. Ask the customer for their fleet barcode and scan it to populate the account. If they do not have a barcode, ask for the Fleet Account Number and press ENTER. The vehicle is now linked to the fleet account.
  3. Refer to instructions **3-9 on Card 3** to complete the service.




**How to service a Fleet customer  
WITHOUT their account number  
after scanning VIN**

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1. After hitting OK, press Enter without entering in any numbers in the account number box.
  2. Next, enter at least the first word of the fleet customer's company name in the Name box and press ENTER.
  3. Select the correct company name from the list. You may select, "GO BACK" or "MORE" in case the correct company name is not immediately displayed on the list.
  4. Refer to instructions **3-9 on Card 3** to complete the service.





**How to service a Fleet Customer  
with the wrong company  
selected**

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1. Enter any required information (e.g. vehicle mileage) and click through any pop ups that appear until you're able to hit "Go Back" on the Fleet Requirements Screen to the right.
  2. Click the fleet tab and select "Pick Fleet from List" underneath it.
  3. Clear the account name and begin typing in the correct company name and press ENTER.
  4. Pick the correct company from the list.
  5. Refer to instructions **3-9 on Card 3** to complete the service.



**How to service a regular (non-fleet vehicle) customer linked to a Fleet Account**



Cancel the ticket, and start over by selecting “FULL CUSTOMER” and rescanning the VIN. Proceed to serve the customer.



# **Frequently Asked Questions**



**What if a discount is automatically applied when it isn't supposed to? (Such as Fleet Power Hours)**

Don't panic. Let the customer have the discount and give them excellent service.

**Can fleet accounts participate in banner discounts?**

ONLY Small Business Fleet Accounts ARE eligible for banner discounts.



**What happens if I am not able to build the ticket according to these instructions?**

Take care of the customer and follow up with Auto Data support at 800-583-5823 or

[take5shopsupport@autodatainc.com](mailto:take5shopsupport@autodatainc.com)

**What happens if a fleet customer wants a paper invoice?**

Let the customer know all of their invoices will be automatically emailed to the billing contact. If the customer still insists on having a paper invoice, print it out for them.

### **What if the driver wants a service that is restricted?**

Inform the driver that their company selected these service restrictions. We CANNOT bypass restricted products or services. Tell the customer changes can be made by their Fleet Manager.

### **What if the driver wants to know what discount they are receiving?**

Look at the Fleet Pricing box and Special Pricing boxes. ALL automatic discounts that applied to the ticket are here. This includes the base discount for the fleet size under "Percent Discount." If there is a price discrepancy, refer to this as needed.

# SMALL BUSINESS FLEET ACCOUNT FAQ





**I cannot find a Small  
Business Fleet in Auto  
Data?**



Take care of the Fleet Customer. Ensure your store is doing your Autopoll every morning. If you still cannot find a fleet the next day, call Auto Data from the shop or email them at [take5fleetsupport@autodatainc.com](mailto:take5fleetsupport@autodatainc.com).




**Where do Fleet Accounts  
pay a bill?**



They can contact My Fleet Center by phone 888-999-9497  
or email [admin@myfleetcenter.com](mailto:admin@myfleetcenter.com) - please have them  
reference their Account Number.





**What if the wrong Fleet Account  
was charged?**




Message us in detail on Rally Point the reason and the correct Fleet to charge. If you do not know the Fleet and it's a Small Business Fleet Account, we can help. We will need the invoice emailed once we contact you, so keep this handy.

**I accidentally rang up my  
Fleet invoice twice, what do  
I do?**



The Store Manager needs to know. Corporate Shop Managers can issue a refund via JIRA. Franchise locations process payments at the store level - contact your District Manager or Managing Director.




**The Fleet information is wrong  
on Auto Data.**

Send us an email at [fleetoperations@take5oilchange.com](mailto:fleetoperations@take5oilchange.com) and include the Fleet Account Number/Company Name or Contact and we can update it.





**The discount is wrong in Auto  
Data/I cannot apply a Top Off.**

Send us an email at [fleetoperations@take5oilchange.com](mailto:fleetoperations@take5oilchange.com),  
or post on Rally Point, with the Fleet Name and/or Account  
Number and we can update it.





**I had a customer sign up for a  
Fleet Account - what is the  
status of the lead?**



You can track the status of your leads and SPIF payments on the Fleet Tracker updated every week under the T5 Fleet channel on Rally Point.





**What if I have an emergency  
situation for a Small  
Business Fleet Account?**



You can email [fleetoperations @take5oilchange.com](mailto:fleetoperations@take5oilchange.com); if the emergency cannot wait, email your local Small Business Account Manager and direct them to call you.





**Where do I order Fleet Brochures?**



All fleet marketing materials can be purchased  
on the Warehouse.


# PROCESSING FLEET VEHICLES (NATIONAL ACCOUNTS)



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1. Auto Integrate Process Overview
  2. ARI Process Overview
  3. National Account Cheat Sheet

# Who uses Auto Integrate?

Car Advise	Donlen	America's Car-Mart
Emkay	Enterprise Fleet	Fleetio
Hertz	Lease Plan	Mike Albert Leasing
Element		

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1. Add the Vehicle - Click the **Customer** button, select **Fleet Customer**, and scan VIN#
  2. Review Requirements - Click the **Get Pre-Approved Services List**
  3. Build the Ticket - Click the **Continue** button and the **Total** button to proceed with authorization
  4. Submit for Approval - Click **Send Approval Request** to submit for approval
  5. Authorization - Status will change to Approved and the PO# will appear once you receive approval
  6. Close the Ticket - Click the **Payment** button and select the **Fleet Payment** option, review Fleet Requirements, then click the Final **OK** button.



# ARI Process Overview

1. An ARI Fleet vehicle will pull into the shop (the driver will inform you that they are an ARI customer).
2. Build the ticket in Auto-Data.
3. Utilize PartnerConnect to create a Purchase Order (PO) by following the instructions in this guide.
4. As soon as PartnerConnect indicates the vehicle is "Approved for Service," service the vehicle.
5. Print the invoice and close out the PartnerConnect ticket.

# How to use ARI Partner Connect



1. Go to [www.aripartnerconnect.com](http://www.aripartnerconnect.com)
2. Enter your User ID. Your User ID is based on your Shop #.  
EX – Shop 9999 = **LVT9999UA**
3. Enter Password. The standard password = **T@ke5oil** (It is case-sensitive)
4. Enter VIN#
5. Select **Services**
6. Request Approval
7. Close the Repair in Partner Connect

# National Fleet Cheat Sheet

Fleet Account	3rd Party Auth	Billed?	Identifier?
America's Car-Mart	Auto Integrate	Yes	Virtual Fleet Card
ARI	Partner Connect	Yes	Voucher/Card
Donlen	Auto Integrate	Yes	Voucher
Element	Auto Integrate	Yes	Green/Blue Card
Emkay	Auto Integrate	Yes	Voucher
Enterprise Fleet	Auto Integrate	Yes	Card
Fleet Response		Yes	Brochure
Merchants		Yes	Card

# National Fleet Cheat Sheet

Fleet Account	3rd Party Auth	Billed?	Identifier?
Map/Wheels		Yes	Map Passport
Fleetio	Auto Integrate	Yes	Digit Card/Phone
Lease Plan	Auto Integrate	Yes	Card
GSA		No	WEX Fleet Card
Mike Albert	Auto Integrate	Yes	Card
Car Advise	Auto Integrate	No	Mobile Device