



Fleet Charge Requirements

Intent

To create awareness about reading the Fleet store comments on the Charge Requirements screen.

Audience	Apprentice Tech and above
Schedule	Add time for this talk into your schedule. It should only take 10-15 minutes.
Prepare	A day ahead: 1) Print and review this talk. 2) Familiarize yourself with the "Charge Requirements" screen for Fleet customers.
Follow up	Observe team members reviewing the store comments on Fleet Charge Requirements screen.

Reviewing Fleet Comments

Do: Look up "Sundt Construction" under the AR Account tab. Review the Charge Requirements screen.

Discuss: What are the store comments? The most important detail is the note stating ****PLEASE CALL DT FLEET AT 866-895-8032 BEFORE INVOICING****. This indicates that there are special requirements regarding this account that must be followed. Once you call the Fleet team, they can access more detailed account information, help you make sure the customer gets the correct product, and that all requested invoicing procedures are followed.

Explain: The notes section on this page is very limited; not all customer requests will fit within the designated space.

- Always read the notes and follow them exactly.
- If there are no notes please ask the customer if anything needs to be recorded on the invoice specific to their needs such as drivers name, license plate, or vehicle number.
- If there are no notes and the customer has no requests - invoice as usual.
- If the customer has requests and they are not notated in the system, please honor those requests. Then, call the Fleet department and share this information so that we can update the customer's account.
- Never hesitate to call the Fleet team at (866) 895-8032 if you have questions or are unsure about how to get a Fleet customer taken care of.

Answers

Question 1: What are some examples of special requirements Fleet customers may receive or need?

- Special pricing, brand, or size restrictions.
- Certificates

Question 2: Why is it important to review the comments?

- There may be details and requests on this account that could not fit in the store comment section. You must call the Fleet department and get the details before you can finalize an invoice for this customer.

Call to Action:

- 1) Ask participants to log into the LMS and complete the acknowledgment for this talk.
- 2) Explain how you will support this and why you expect this to improve Fleet delight.
- 3) Ask if anyone has questions. If there are questions or concerns you cannot answer, notify the Store Manager.