



## Locating Fleet Customers

### Intent

To create awareness surrounding fleet customers and help make locating them within the POS easier.

<b>Audience</b>	Apprentice Tech and above
<b>Schedule</b>	Add time for this talk into your schedule. It should only take 10-15 minutes.
<b>Prepare</b>	<p>A day ahead:</p> <ol style="list-style-type: none"> <li>1) Print and review this talk.</li> <li>2) Review <a href="#">Finding a Fleet Customer in the POS</a> QRG on the Fleet page of the KC.</li> <li>3) Ensure you can locate Fleet customers within the POS.</li> </ol>
<b>Follow up</b>	Observe team members locating Fleet customers in the POS.

### Finding a Fleet Customer in the POS.

**Explain:** When a Fleet customer visits your store, it is important to make sure that they have a properly established account in the POS. This makes the process for locating them much easier and faster, saving time for both the employee and the customer. Ensuring that the customer's account is properly set up will also help to ensure that future records are easily accessible and accurate.

#### Answers

**Question 1:** What is the first category I should select when looking for a Fleet customer within the POS?

- Look in the "A/R Customers Only" section first.
- Search by company name, account number, or phone number.
- If the customer is not located within this section, move to "Resale Customers Only" and finally to "Retail Customers Only".

**Question 2:** What if the customer does not have an A/R Account?

- Continue to serve the customer as normal
- At the end of the invoicing process, please provide the customer with an A/R credit application and inform them that we are currently updating all our records and would like to get current information. Please let your customer know that the application has the option to apply for credit, however, they can simply choose "CASH" if they prefer to pay with credit card, company check, etc.

**Question 3:** Can I send the application to the customer electronically?

- Yes. The application can be found on the Fleet page on the KC and on all three of our websites.

### Call to Action:

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