

Auto Integrate

Benefits

Fleet and ride sharing are becoming a larger consumer audience.

- Auto Integrate helps us Grow Responsibly by **expanding and improving our services to fit the needs of the market.**
- Auto Integrate **saves time and speeds up the approval process** by eliminating the need to call Fleet Management companies for work order approvals.

Print a copy of this Best Practice to review your execution.

VTV

Capture all required information during VTV, including outer, middle, and inner tread depths. Record VIN #, Fleet Card #, and Unit # in the comments field.

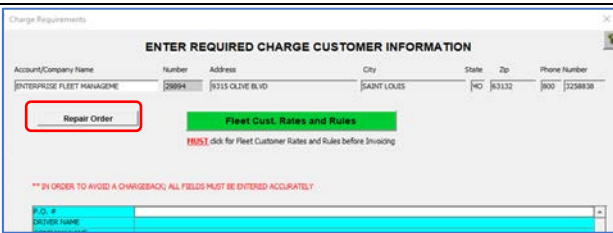
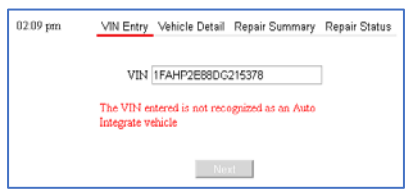
Before accessing Auto Integrate

Before accessing Auto Integrate through the POS, be sure to:

- Identify the customer using their Fleet account ID.
- Add the Fleet customer vehicle.
- Follow standard procedure for fitment validation.
- Follow standard procedure for tire selection using Treadwell.

Authorizing through Auto Integrate

Follow these steps in the POS to access and authorize this transaction with Auto Integrate:

Step	Action
1	<p>Select the Repair Order button on the Charge Requirements screen. This will open the Fleet Application where the electronic work order processing happens.</p>  <p>DO NOT fill in any of the blue fields yet. A majority of these will auto populate based on information entered in the Fleet Application.</p> <p>Note: The Repair Order button is only visible to Auto Integrate Fleet/AR Accounts.</p>
2	<p>Enter the VIN and press the Tab key.</p> <p>An invalid VIN keeps the Next button locked and prompts an error message.</p> <p>A valid VIN number displays the Fleet ID, year, make, and model.</p> <p>After a valid VIN is entered, click Next.</p> 

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**Authorizing
through Auto
Integrate****3**

Enter vehicle details for the work order.

Towed?, Driver Waiting? and **SP** fields are optional.The following vehicle details are **required**:**Repair Comments**

Comments added here will display in the Auto Integrate application.

MileageVery important to note accurate mileage; please be sure to double-check accuracy on the **Repair Summary**.**Start Time****Estimated Completion Time**
(Start Time + 90 minutes)**Replace Tire?**

Use the dropdown menu to select a replacement reason.

LF/RF/LR/RR (tread measurements)All three tread depths (inner, middle, and outside) **MUST** be included.Click **Next**. This will take you to the **Repair Summary**.**IMPORTANT:** Do not skip the **Repair Summary** screen. If you do, an error displays, "Repair Order Not Valid". If this happens, go to **Repair Summary**.

4Review all information on the **Repair Summary** tab thoroughly for accuracy. Navigate back to the **Vehicle Detail** tab and fix any incorrect information, if necessary.

- If 'vehicle preventive maintenance' displays, add to the invoice.¹
- Check the accuracy of the mileage.
- Change Certificates quantity to 0, unless specifically requested by the customer.
- Use extra lines for additional notes or explanations.

Click **Submit**.

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¹ See an example on the page 4.

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Authorizing through Auto Integrate

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The **Repair Status** tab displays the approval status for the work order. One of three things may occur:

Authorized – displays when the work order is approved by the Auto Integrate application.

11:02 am VIN Entry Vehicle Detail Repair Summary **Repair Status**

Repair Number 13020
Status Authorized
 VIN 1FAHP2E8DG215377
 AI Reference 6210104
 Fleet ID 913985

Finish

Awaiting FM – displays when the approval is still in progress

You may click the Refresh button until the **Status** changes to **Authorized**

10:57 am VIN Entry Vehicle Detail Repair Summary **Repair Status**

Repair Number 13020
Status Awaiting FM
 VIN 1FAHP2E8DG215377
 AI Reference 6210104
 Fleet ID 913985

Refresh

If authorization is delayed, you can convert the POS transaction to a quote and come back to it later. Please follow instructions in Authorization delays section on page 5.

Not Authorized – On occasion, Auto Integrate may reject an order, resulting in the status **Not Authorized**.

A few reasons for this outcome include, but are not limited to:

- Mileage does not match vehicle records
- Unapproved product selected
- Pricing
- Items no longer needed

01:48 pm VIN Entry Vehicle Detail Repair Summary **Repair Status**

Repair Number 18887
Status Not Authorized
 Adjust Invoice to comply with denial reason below.

VIN 3FAHPHAK28H451
 AI Reference 6218117
 Fleet ID 913985

Reason Denied on Price - as

Product	Description	Price
25384	BR2 BRIDGESTONE DRIVE GUARD 15R	

Repair Number	Product Size	Description	Axle	Price	Qty	Total
18887	225 /55 R17 97V SL BSW AF	BR2 BRIDGESTONE DRIVE GUARD	8	158.00	1	158.00
Subtotal						158.00
Tax						10.00
Total						168.00

If this happens:

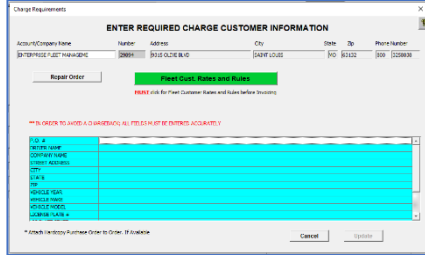
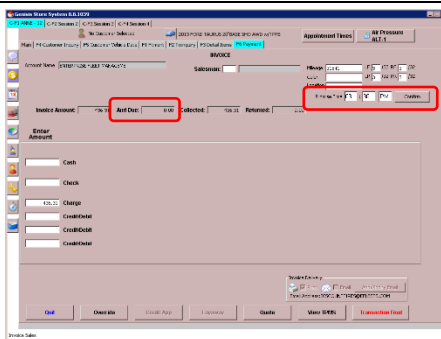
Step	Action
1	Identify the likely reason.
2	Close the Auto Integrate application, NOT the POS.
3	Cancel out of the Charge Requirements screen.
4	Make corrections on the Detail Items screen.
5	Select the Repair Order button to reopen the Auto Integrate application.
6	Update the Start Time and Estimated Completion Time fields.
7	Review the Repair Summary tab and make any other updates that are needed. Note: If you don't see the edit icons, this indicates that you failed to update the Start Time and Estimated Completion Time fields.
8	Resubmit the order.

If you continue to have issues getting authorization, phone the Fleet Team for help at 866-895-8032.

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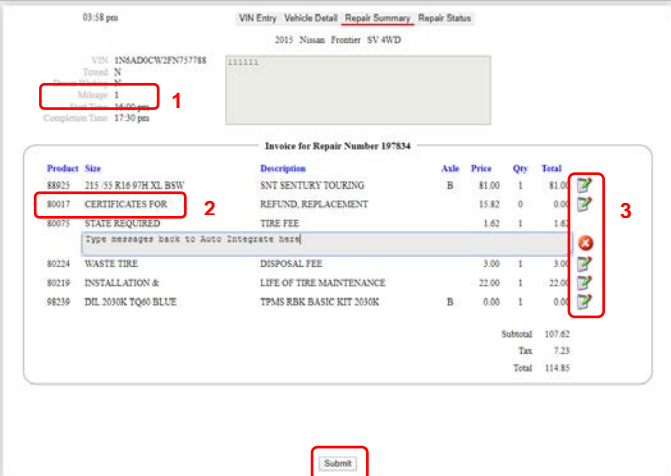
Authorizing through Auto Integrate

<p>6</p>	<p>After clicking Finish, once the work order is authorized, the updated Charge Requirements window displays.</p> <p>There are several new items on the screen:</p> <ul style="list-style-type: none"> • Repair order number displays. • Green Authorized status • Cancel button locked to prevent more changes to the invoice in the POS • Update button remains locked until remaining fields are populated, and Rates and Rules has been opened. <p>You cannot change the P.O.# once the information is sent to the POS. Fill out all remaining blue filled accurately, then press Update.</p>	
<p>7</p>	<p>The Payment screen displays. From here, you can update Promise Time, if necessary.</p> <p>The Amt Due: field must be 0.</p> <p>**NOTE**</p> <ul style="list-style-type: none"> • If you need to cancel an order after Auto Integrate authorization but BEFORE finalization in the POS, click Cancel to send a cancellation to Auto Integrate. • If you encounter any technical issues with Auto Integrate, please contact Fleet Support 866-895-8032. • If you need to issue a refund or void after work order finalization, please follow the necessary steps to perform a refund or void in the POS. 	

Example

In the Auto Integrate example below, a free rotation and rebalance were added to the invoice. When adding two new front tires, the rotation should be included, and the tires should be installed in the rear. Other notable items include:


1. **Mileage** – check accuracy of noted mileage
2. **Certificates** – unless otherwise stated by the customer, change the certificate quantity to 0
3. **Line Items** – used to include additional notes which are unrelated to repair comments



Authorization delays

You have an option to convert any fleet Auto Integrate transaction into a quote while you wait for approval. This avoids inconvenience in situations where approval may be delayed. Later, after approval is received, you can open the quote and finish the transaction. By doing this, you avoid sending a cancelation to Auto Integrate, don't need to keep a POS screen open, and won't need to rekey the transaction later on.

Follow these steps to convert the fleet transaction to a quote while waiting for approval:

Step	Action						
1	Close the Auto Integrate screen.						
2	On the Charge Requirements screen, <ul style="list-style-type: none"> Fill in the Driver's Name field. Select the Convert to Quote button. 						
3	Complete the quote normally.						
4	Later, you can select the quote from the Quotes list and convert it to invoice.						
5	Continue to the Charge Requirements screen, select the Report Order button to open Auto Integrate, and see if the approval has come through. <table border="1"> <thead> <tr> <th>If the transaction is...</th><th>Then ...</th></tr> </thead> <tbody> <tr> <td>Approved,</td><td> Finalize the transaction. If you cannot finalize the transaction immediately, then follow steps to Convert it to a new Quote. You cannot just close or quit the POS session or it will cancel the Approved repair order. </td></tr> <tr> <td>Not approved,</td><td>You can close the Auto Integrate screen and quote and try again later.</td></tr> </tbody> </table>	If the transaction is...	Then ...	Approved,	Finalize the transaction. If you cannot finalize the transaction immediately, then follow steps to Convert it to a new Quote. You cannot just close or quit the POS session or it will cancel the Approved repair order.	Not approved,	You can close the Auto Integrate screen and quote and try again later.
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