

## Processing Fleet Transactions

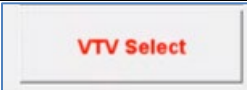
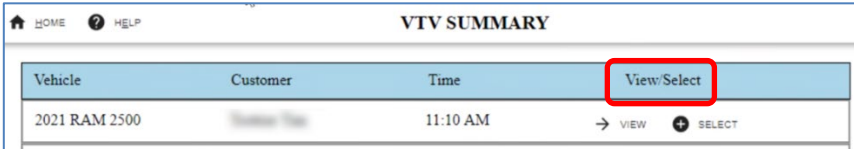

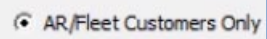
**Current State** Currently, the POS does not automatically transfer all required information from the mobility device into the POS for non-Auto Integrate customers.

Identifying every fleet customer and generating their invoice correctly is critical to the success of our fleet business. When processing transactions for fleet customers who do **NOT** use Auto-Integrate, you must re-key some VTV information into the POS manually.

Your Sales Team must process these transactions correctly to avoid chargebacks to your store.

- Key Steps** These are the key steps to process fleet customer transactions correctly:
- 1) After selecting the customer from the VTV select screen, select **AR/Fleet Customer Only** radio button.
  - 2) Look up Company Name.
  - 3) Read Rates and Rules.
  - 4) For non-Auto Integrate customers, look up and print out VTV information from VTV Details screen, and re-key it into Required Information for Charge Customer fields. (*printing instructions on page 3*)
- Information will transfer over automatically for Auto Integrate customers.

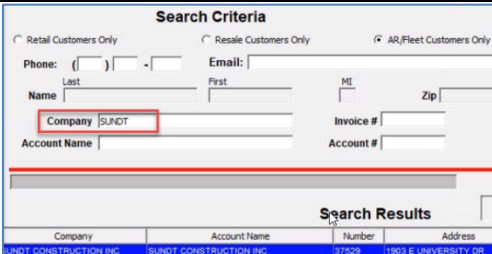
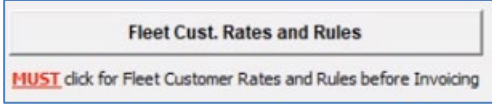
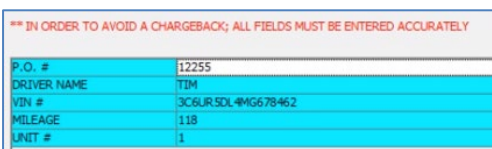
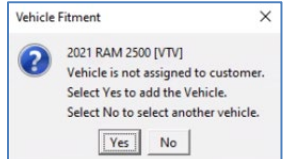
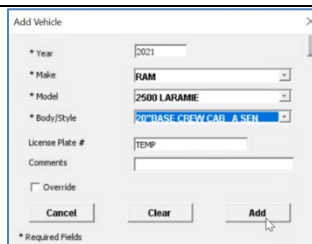
**Processing fleet transactions** Follow these steps to process non-Auto Integrate fleet customers in the POS:

Step	Action
1	In the POS, select <b>VTV Select</b> to open the VTV Summary screen. <div>  </div>
2	<div>  </div> <p>Select the customer, then select <b>VIEW</b> to open the VTV Details screen and display the VTV information collected on the scanner during VTV.</p> <p><i>You will need this information to process the transaction in the POS.</i></p> <div>  </div>
3	Choose <b>Select</b> to begin processing this transaction.
4	On the Fleet Inquiry screen, select the <b>AR/Fleet Customers Only</b> radio button. <div>  </div>

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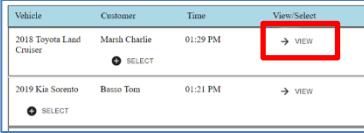
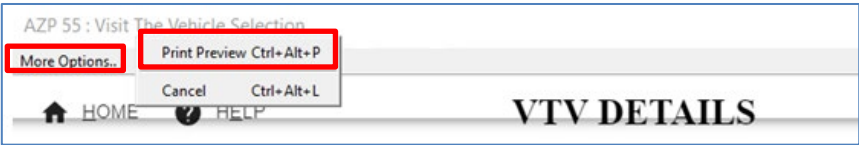
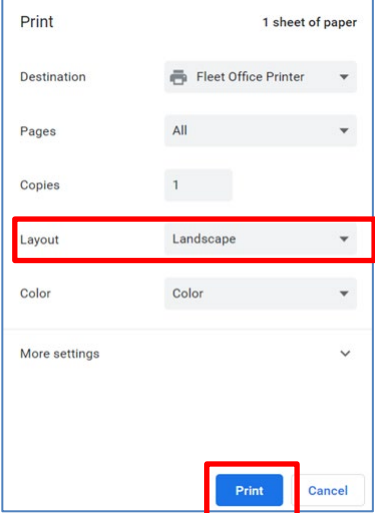
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**Processing  
fleet  
transactions**

Step	Action
5	<p>Type the company name in the Company field or enter the Account # and search for the fleet account.</p> <p>Select the customer account from the Search Results.</p> 
6	<p>On the Customer Inquiry screen, read <b>Fleet Cust. Rates and Rules</b> for this customer.</p> 
7	<p>If information does not auto-populate, look up required information from the VTV Details screen for this customer and key it into the required fields on the Required Charge Customer Information screen.</p> <p><b>Note:</b> To do this, you will need to open the VTV Select screen on a separate terminal. To save time and avoid keeping a second screen open, you can print the VTV Select screen. See <b>Printing VTV Details</b> on the next page.</p> 
8	<p>If this vehicle is not already associated with the account, add the vehicle on the Vehicle Fitment popup.</p> <p>Otherwise, choose the vehicle off the list and complete the transaction.</p> 
9	<p>Fill out the information for the vehicle on the Add Vehicle popup and select <b>Add</b>.</p> 
10	<p>Complete the transaction.</p> <p><b>Note:</b> On the Payment screen, you can select <b>VTV Insp</b> to view the VTV Select screen, but you should always start with the VTV Select screen to ensure that the vehicle is associated with the transaction and account.</p>

## Printing VTV details

Follow these steps to open and print the VTV details for your fleet customer:

Step	Action
1	<p>Select the <b>VTV Select</b> button.</p> 
2	<p>Select <b>VIEW</b> for the fleet vehicle on the VTV Summary List.</p> 
3	<p>On the VTV Details screen, select <b>More Options ...</b>, then <b>Print Preview</b>.</p> 
4	<p>Choose Landscape from the <b>Layout</b> dropdown and print the page.</p> 

## Contact

Should you have any questions or would like assistance, please call the Fleet Team at (866) 895-8032. We are happy to help.