

Enterprise Fleet Instructions

❖ **ALWAYS** get approval through Auto Integrate **BEFORE** starting the oil change!

1. Start by collecting the driver's Enterprise Fleet Card. If driver doesn't have a card, you can search by VIN number located on driver's side window and/or inside driver's door. Registration papers have the VIN as well.
2. Enter the fleet information into Auto Integrate to start building a repair order.
3. Begin building a ticket in Square. Make sure to add "Enterprise Fleet Management" as the customer. Always include shop service fee, courtesy checks, etc. There are **NO DISCOUNTS** on Enterprise.
4. In Square, make sure to add notes on the vehicle. Always include the VIN and year/make/model. Example: "Method Flow/Enterprise unit123, 2023 Toyota Tundra VINXXXXXXXXX". This helps us reconcile the Square tickets to the Auto Integrate repair orders.
5. Build the ticket in Auto Integrate to match the ticket in Square. Search repair type to find "synthetic lube" or something similar as the repair type. Enter the total ticket dollar amount, **NOT** an hourly amount. *If ancillary items like wipers, batteries, air filters are needed, search Auto Integrate for those items and put them as a separate line item from the oil change.*
6. After verifying that the Auto Integrate and Square tickets are correct and match each other, hit the button in Auto Integrate to request approval. **DO NOT perform oil change until the repair order is APPROVED!**
7. When approval is granted in Auto Integrate, perform the service. Enterprise usually has \$125 guaranteed approval and is usually a quick turnaround time.
8. When the oil change is done, **hit the WORK COMPLETE button** in Auto Integrate.
9. In Square, select 'charge' on the iPad, then find the 'other payment type' option. In the notes, write "Enterprise ACH payment". When you hit the charge button, the receipt will print and the record of the sale is recorded in Square.
10. Give the driver the Square receipt like you normally would, walk through the services, thank them for their business, let them know top-offs and air is free between oil changes, etc etc.

Enterprise Help Line - 1-800-325-8838

You can call this number if problems arise with Auto Integrate process and get manual approval. If all else fails, save the ticket and I can manually invoice Merchant's at a later date.