

## **Merchants Fleet Instructions**

- ❖ ALWAYS get approval through Auto Integrate BEFORE starting the oil change!
- ❖ If you do not get approval, then you must call Merchants prior to doing the service.
- ❖ You must create a “Merchants Fleet Service” Customer Account in Square
- ❖ Electronic Payment Email – [fleetinvoice@merchantsfleet.com](mailto:fleetinvoice@merchantsfleet.com) -Preferred Method
- ❖ Check Payment Email – [fmfaxregular@merchantsfleet.com](mailto:fmfaxregular@merchantsfleet.com) – Manual Process (MUST BE PDF)
- ❖ Credit Card Payment Email – [fmfaxcreditcard@merchantsfleet.com](mailto:fmfaxcreditcard@merchantsfleet.com) – If not Preferred Vendor

1. Start by collecting the driver's Merchant's 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. **Merchants pays via invoice from Square.** Make sure to add "Merchants Fleet" as the customer. Always include shop service fee, courtesy checks, etc. There are **NO DISCOUNTS needed** - Merchant's automatically adds a discount when they pay us.
4. In Square, make sure to add notes on the vehicle. Always include VIN and year/make/model. Example: "Patterson/Merchants unit123, 2023 Ram 1500 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.
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 **INVOICE OPTION**. Merchants invoices must have all vehicle info from Auto Integrate (Auto Integrate RO number, VIN, odometer, year/make/model, license plate, Merchants Unit #) When you finalize the invoice and hit submit, the ticket goes automatically to Merchants' email where invoices are paid from.
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.

### **Merchants Help Line - 1-877-870-4999**

*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.*