

**SYNFAST**  
**OIL CHANGE.**



# SECTION 1: Fleet Manual

## Sales and SOP/Invoicing

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**SYNFAST**  
**OIL CHANGE.**



**FLEET MANUAL**



# SYNFAST OIL CHANGE FLEET OPERATIONS GUIDE

UPDATED: 12/29/17

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# FLEET MANUAL

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## FLEET MANUAL

# Increasing Car Counts through Fleets

This manual has been developed for District Managers and Service Center Managers to increase their car count. SCMs should work with their CSAs and DMs to set up their Fleet Leadsheet and ensure all Associates are trained on how to invoice all Fleet Management Account (FMA) and Local Fleet customers.

Fleet (Company owned or leased) vehicles represent the potential for increased cars for your service center(s). Below are some guidelines for the Service Center Manager and District Manager to use in getting these vehicles to your service center(s).

1. Starts with good operations. Don't try and build fleet sales until you are confident you have good operations. Call Outs, Speed of Service, and Sense of Urgency are all non-negotiable and must be managed for every vehicle, every time. If Store Audit scores are below 90%, there are significant issues that need to be resolved prior to the DM and SCM working to bring in Fleet Services. Do not move forward with this program without Operations Manager and/or DM approval.
2. What businesses are within 2-3 mile radius of the service center? Work with your DM to drive the area looking for potential businesses. Pool Cleaning, Plumbing, electrical and contractor companies offer the best possibilities.
3. Do a web search using Yelp or Google to find businesses in your area. Start with the companies that have the largest ads. If businesses like supermarkets, convenience stores, and restaurants have free local ad magazines, look through it to identify which businesses advertise in your area.
4. Get involved in a local service organization.
5. Large or National companies in your area represent two potential benefits: Employee discounts and company vehicles. For these National headquarters companies, they may use one of our National Fleet Accounts such as Element, WEX etc. When you call these companies and ask for the Fleet Manager you are informing them that we can custom cater a Preventative Management (PM) service program specific to their fleet's needs.
6. DM visits to the stores must continually emphasize fleet sales and the SCM's must have weekly or monthly goals for signing up fleets, making fleet calls, or setting up employee discount programs.

## FLEET MANUAL

# Making a Fleet Service Cold Call

Have the following materials available when you make a “Cold Call” to a prospective fleet customer.

1. SynFast Fleet Lead Sheet Tracker

Ensure you have worked with your DM to complete the Fleet Lead Sheet. Your DM has received a spreadsheet with potential Fleets in your area. Fill in the "Company/Contact/Phone/ Email

2. Location List

If the company has drivers that travel a lot, the driver can access any of our locations.

3. SynFast Local Fleet SOP

Understand the Local Fleet setup procedure. Your potential customers will have questions and you do not want to seem like you do not understand our SynFast Fleet Program. Confidence is key in sales, and knowledge builds confidence.

4. SynFast Fleet Application

Review the application to ensure what kind of information your potential fleet customers will have to provide.

5. SynFast Customize Application

This is what will set you apart from the competition. Use this tool to customize the expectations for your potential guest by effectively communication what services your store can perform and the price point to reflect the value.

6. Current Promotions

Mention any current promotions to incentivize the potential fleet customer to visit/sign up TODAY.

Many of the contacts that are provided on the Fleet Lead Sheet Tracker may be the CEO, President, or owner of the company. He or she may not be the person who makes these decisions, and the company may have a specified Fleet Manager or Operations Manager that you will need to speak to.

Otherwise, you will probably reach a receptionist when you call. Here is what you should say to them:

**Good Morning (Afternoon). My name is \_\_\_\_\_ and I'm with Synfast Oil Change. We are a quick-lube, oil change company that has over 30 locations in Southern California and Arizona. I'm the Manager of our \_\_\_\_\_ location. Could you direct me to the person in your company who makes the decision about how they service your company's vehicles?**

Most receptionists will give you that person's name and extension #. Make sure you write it down. When that person comes on the line greet them with; **“Good Morning (Afternoon) Mr. (Ms.) \_\_\_\_\_.”**



## FLEET MANUAL

Then proceed through the same introduction you did at the beginning. You will then ask this person how they are currently servicing their company vehicles. If they tell you that they are servicing their vehicles in-house, point out the advantages of using SynFast Oil Change: No down-time for their drivers. Convenient monthly billing statements via weekly direct billing, or popular payment systems like PHH, GE Capital, Devry or Donlen. If they have internal fleet maintenance mechanics, using Synfast for preventative maintenance will free up their mechanics to allow them more time to work on the major mechanical problems in their shop.

If the person tells you they are using another competitor talk about the following advantages Synfast can give them.

- 1. Over 30 convenient locations throughout Southern California and Arizona**
- 2. Open 7 days a week, including nights and weekends**
- 3. Competitive pricing**
- 4. Castrol lubricants with products No down-time (use this if they are using a “tire shop” or local garage)**
- 5. Oil Changes in about 15 minutes**
- 6. Convenient monthly billing and easy admin**
- 7. Online maintenance records available to access at any time**
- 8. Vehicle management through CarFax**
- 9. Castrol Roadside Assistance w/ 24 hour Emergency Roadside Assistance and Towing (up to 25 miles) for qualifying Castrol Full Synthetic Oil purchases**
- 10. Full range of services, including Smog and Brake Services (see Services List)**
- 11. 15% discount on all parts-services**

Then ask for an opportunity to meet with them so you can show them in more detail how the program can work for them. We will set up a Preventative Maintenance (PM) schedule (see form) so each vehicle can be tracked. All records are tied into Carfax, and they can use the app to manage their fleets. You may also invite them to your location for a special discount on their vehicle so they can see for themselves what a great job you can do for them.

The point of this call is to get an appointment not to sign them up at this time.

Once the call is done, make sure you take notes on the Fleet Leadsheet and on your planner and schedule a follow-up call to the customer based on how the conversation ended.

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## FLEET MANUAL

# Store Locations List

Store Initials	Store Name	Phone number	Address
BAL	Balboa	858-560-7311	6395 Balboa Ave, San Diego, CA 92111
BKE	Bakersfield 1 - East	661-872-3914	1407 Columbus St, Bakersfield, CA 93305
BKW	Bakersfield 2 - West	661-393-1707	2821 N Chester Ave, Bakersfield, CA 93308
CVE	Chula Vista East	619-216-1646	1556 E H Street, Chula Vista, CA 91913
CVW	Chula Vista West	619-421-2464	899 E H Street B, Chula Vista, CA 91910
ELC	El Cajon	619-447-2844	610 N Second St, El Cajon, CA 92021
ENC	Encinitas	760-943-1517	127 S El Camino Real, Encinitas, CA 92024
ESCC	Escondido Central	760-740-1311	649 N Broadway, Escondido, CA 92025
ESCE	Escondido East	760-741-1236	2109 E Valley Pkwy, Escondido, CA 92027
ESCW	Escondido West	760-740-0899	645 W Mission Ave, Escondido, CA 92025
GAR	Garnet	858-273-3501	2002 Garnet Ave, San Diego, CA 92109
GLN	Glendale	818-476-5900	525 N. Glendale Ave., Glendale, CA 91206
HEM	Hemet	951-766-7055	3615 W. Florida Ave., Hemet, CA 92545
LH	Lake Havasu 2 - North	928-453-0982	1699 Mesquite Ave, Lake Havasu City, AZ 86403
MB	Manhattan Beach 1	310-546-4488	1405 N Sepulveda, Manhattan Beach, CA 90266
MME	Mira Mesa East	858-566-9323	9470 Mira Mesa Blvd, San Diego, CA 92126
MMR	Miramar	858-566-4377	6914 Miramar Rd, San Diego, CA 92121
MMW	Mira Mesa West	858-693-1945	8336 Mira Mesa Blvd, San Diego, CA 92126
NAV	Navajo	619-469-4494	8675 Navajo Rd, San Diego, CA 92119
PD	Palm Desert	760-776-7570	74180 Highway 111, Palm Desert, CA 92260
RB	Rancho Bernardo	858-673-9408	16410 Bernardo Center Dr, San Diego, CA 92128
ROS	Rosemead	626-254-7772	3603 Rosemead Blvd., Rosemead, CA 91770
RPV	Rancho Palos Verdes	310-519-8295	29519 Western Ave, Rancho Palos Verdes, CA 90275
RSD	Rancho San Diego	619-660-0992	2926 Jamacha Rd, El Cajon, CA 92019
SA	Sports Arena	619-574-1175	3760 Gaines St B, San Diego, CA 92110
TO	Thousand Oaks	805-497-4848	2378 E Thou Oaks, Blvd, Thousand Oaks, CA 91362
VIS	Vista	760-598-1576	243 Sycamore Ave., Vista, CA 92083
HH	Hacienda Heights	626-839-4619	17175 Colima Road, Hacienda Heights, CA 91745
OBS	OB Smog	619-221-5949	4805 W Point Loma Blvd, San Diego, CA 92107
PB	PB Smog	858-273-2191	1905 Grand Ave, San Diego, CA 92109

**Fast Brakes Locations do not sell Castrol Products but can service all FMA and Local Fleet Accounts**

MG	Fast Brakes: Mission Gorge	619-259-6325	6417 Mission Gorge Road, San Diego, CA 92120
SV	Fast Brakes: Spring Valley	619-810-7660	483 Sweetwater Road, San Diego, CA 91977

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## FLEET MANUAL

### Local Fleet Flow Chart

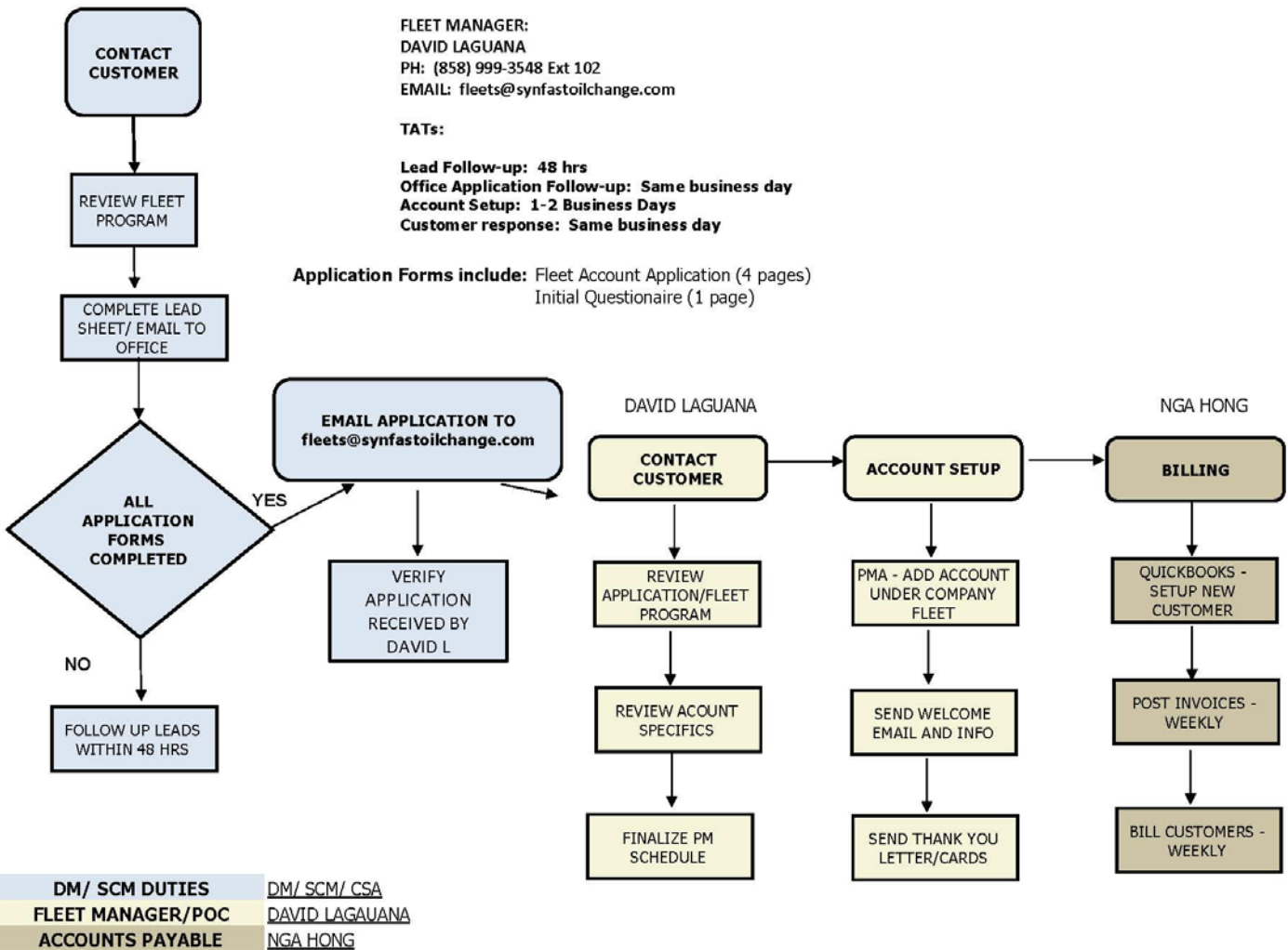
#### LOCAL FLEET

**Important:** All customer inquiries must be referred to the Fleet Manager.

**FLEET MANAGER:**  
 DAVID LAGUANA  
 PH: (858) 999-3548 Ext 102  
 EMAIL: fleets@synfastoilchange.com

**TATs:**  
**Lead Follow-up: 48 hrs**  
**Office Application Follow-up: Same business day**  
**Account Setup: 1-2 Business Days**  
**Customer response: Same business day**

**Application Forms include:** Fleet Account Application (4 pages)  
 Initial Questionnaire (1 page)



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## FLEET MANUAL

# Fleet Management Accounts (FMA)

### **INSTRUCTIONS:**

There are two types of fleet customers: A Fleet Management Account (FMA) and a Local Fleet Account.

**Fleet Management Account (FMA):** A Fleet Management Account (formerly known as a “National Fleet Account”) is a company that businesses can contract to help manage their vehicles. For example, a plumbing company (i.e. ACME Plumbing) may have ten vans they use for their business. ACME Plumbing may not have the resources to hire a full time mechanic or they may not want to deal with all of the administrative work for authorizing work and dealing directly with multiple repair facilities like SynFast Oil Change for each one of their vehicles. ACME Plumbing would then contract GE Capital Fleet Services to be their FMA company, and deal with only GE Capital; this would be easier than ACME having to deal directly with our company for oil changes and preventative services, and also have to deal with a tire company to service tires, a collision repair company to make glass or autobody repairs, etc.

All Fleet Management Account customer invoices require a **Purchase Order (PO) number** recorded on the estimate portion of the service invoice prior to any services being performed. Each individual FMA has differing restrictions on services, so it is critical the instructions listed under each fleet type is followed. Failure to acquire a PO number or a signature from the driver which results in a charge back (payment cannot be collected as normal) may result in disciplinary action.

All invoices must be processed through the POS (PM Attendant), according to the instructions listed for each Fleet Management Account, and a signature from the driver must be attained on the final invoice. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant. See Addendum for details.

Note: in PM Attendant, when the driver and company information is required, the company name IS NOT the FMA. In the example used before, the company name would be ACME Plumbing, not GE Capital Fleet Services. Do not enter the FMA name when entering in the company name; the company that employs the driver is the company.

**Except for MAP/Wheels,** all of the FMA invoices are pulled by our Corporate Office and all of the billing is submitted by our Accounts Receivable Department. Requests may be made by the Corporate Office to

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## FLEET MANUAL

### **Fleet Management Accounts (FMA) continued**

submit the original invoice with signatures, via mail or via email. SCMs must ensure all fleet invoices are properly reviewed for accuracy and properly organized and stored at the store level.

If a fleet customer is not listed, please contact David Laguana at (858) 999-3548 Ext 102 or Nga Hong (858) 273-8539 Ext. 608 at the Corporate Office for authorization instructions.

**Local Fleet Account:** A company like ACME Plumbing company may want to deal directly with SynFast Oil Change if they only have a few vehicles. In this case, any local company interested in signing up for our local fleet program should be given an application. Forms can be printed from the forms website ([www.rfgoil.com/intranet/forms](http://www.rfgoil.com/intranet/forms)) or contact David Laguana directly to email a form to your Service Center.

All local fleet account invoices must be processed through the POS (PM Attendant), and a signature from the driver must be attained on the estimate and final invoice. Failure to attain a signature from the driver which results in a charge back (payment cannot be collected as normal) may result in disciplinary action.

### **Where do I enter the PO #?**

The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant. In the following section, there are detailed instructions with Standard Operating Procedures on how to invoice a fleet customer through PM Attendant.

Please contact your District Manager with further questions.

# Standard Operations Procedures (SOP) for invoicing FMA and Local Fleet customers:

### In PM Attendant:

“Customer” refers to the Fleet Management Account (FMA)

“Company” refers to the company using the FMA

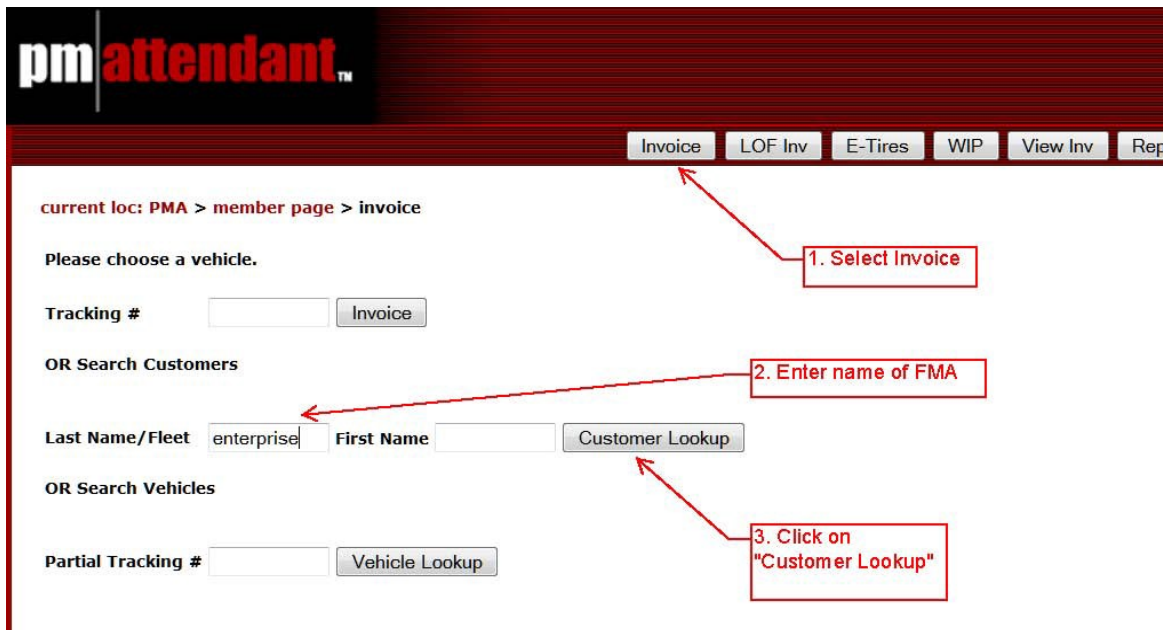
“Company Driver” refers to the name of the driver operating the vehicle or assigned the FMA card/coupon.

Refer to Step 8 for example.

For FMA vehicles, how to get the PO for each type of card is listed in the next section.

### PROCEDURES:

Log into PMA and click on the Invoice button, enter the vehicle license plate to locate account. If unsuccessful, search for FMA or local fleet name and perform a Customer Lookup.



pm attendant™

Invoice LOF Inv E-Tires WIP View Inv Rep

current loc: PMA > member page > invoice

Please choose a vehicle.

Tracking #  Invoice

OR Search Customers

Last Name/Fleet  First Name  Customer Lookup

OR Search Vehicles

Partial Tracking #  Vehicle Lookup

1. Select Invoice

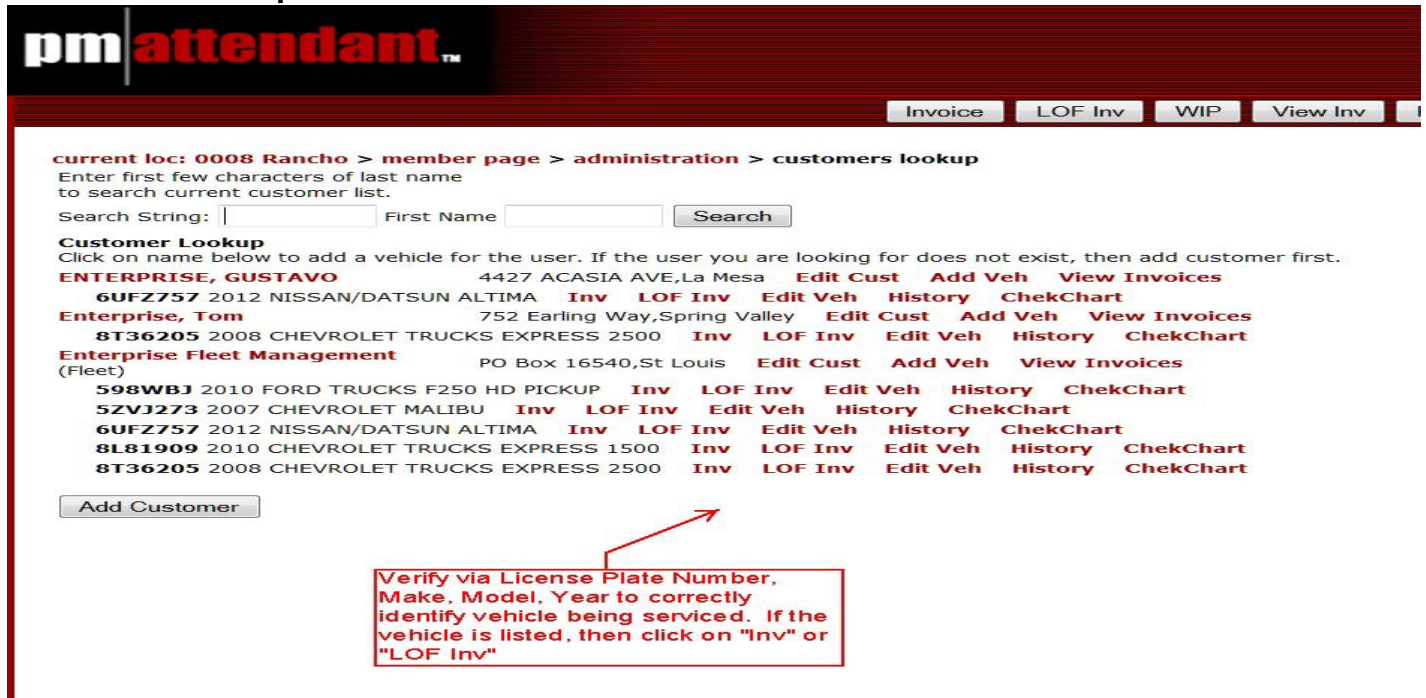
2. Enter name of FMA

3. Click on "Customer Lookup"

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1. There will be two different scenarios: If we have serviced the vehicle before, then you will see a screen similar to what is below. If the vehicle has never been serviced in POS, then the vehicle will have to be entered. **Go to Step 4.**



**pm attendant™**

Invoice LOF Inv WIP View Inv

current loc: 0008 Rancho > member page > administration > customers lookup  
Enter first few characters of last name to search current customer list.

Search String:  First Name

**Customer Lookup**  
Click on name below to add a vehicle for the user. If the user you are looking for does not exist, then add customer first.

<b>ENTERPRISE, GUSTAVO</b>	4427 ACASIA AVE, La Mesa	Edit Cust	Add Veh	View Invoices
<b>6UFZ757</b>	2012 NISSAN/DATSUN ALTIMA	Inv	LOF Inv	Edit Veh History ChekChart
<b>Enterprise, Tom</b>	752 Earling Way, Spring Valley	Edit Cust	Add Veh	View Invoices
<b>8T36205</b>	2008 CHEVROLET TRUCKS EXPRESS 2500	Inv	LOF Inv	Edit Veh History ChekChart
<b>Enterprise Fleet Management (Fleet)</b>	PO Box 16540, St Louis	Edit Cust	Add Veh	View Invoices
<b>598WBJ</b>	2010 FORD TRUCKS F250 HD PICKUP	Inv	LOF Inv	Edit Veh History ChekChart
<b>5ZVJ273</b>	2007 CHEVROLET MALIBU	Inv	LOF Inv	Edit Veh History ChekChart
<b>6UFZ757</b>	2012 NISSAN/DATSUN ALTIMA	Inv	LOF Inv	Edit Veh History ChekChart
<b>8L81909</b>	2010 CHEVROLET TRUCKS EXPRESS 1500	Inv	LOF Inv	Edit Veh History ChekChart
<b>8T36205</b>	2008 CHEVROLET TRUCKS EXPRESS 2500	Inv	LOF Inv	Edit Veh History ChekChart

Verify via License Plate Number, Make, Model, Year to correctly identify vehicle being serviced. If the vehicle is listed, then click on "Inv" or "LOF Inv"

2. Ensure that company name, driver name/number, odometer reading, and PO number are entered and verified. In the example below, Enterprise Rent a Car is the company, and uses Enterprise Fleet Management as its FMA.

## FLEET MANUAL

**pm attendant™**

home > member page > Add Invoice

Invoice LOF Inv WIP View Inv Reports Chek-Chart Timeclock Logout Training Videos

ChekChart Filter XRef Print Work Order Svs Due Graph History Edit Veh Save & Park Inv # 107428

Enterprise Fleet Management  
PO Box 16540  
St Louis, MO 63105  
(877)353-8611

Unit number: 598WB1  
2010 FORD TRUCKS F250 HD PICKUP [5] 8 Cyl 5.4 L(330)  
VIN: 1FTNF285XAEBA0974  
COMPANY NAME: Enterprise  
DRIVER NAME/NUMBER: Tony Arce

Vehicle Info: 7.00 qts Castrol GTX 5w30 VO105 VA223  
Cust Requests:  
Veh Requests:

Storage Area: 0008 Rancho  
Date of service: 2012/04/11  
Mileage at service:   
Hood Tech: Nona  
Lube Tech: None  
Manager: None  
PO #:   
Other: None

Previous comments:  
2012-04-09;49816 miles;RECOMMEND CABIN AIR FILTER RECOMMEND ENGINE OIL SYSTEM FLUSH THANK YOU FOR CHOOSING US HAVE A NICE DAY!

Type comments to display on invoice:  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20  
21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40  
41 42 43 44

1. Ensure the company (NOT FMA) name and driver name/numbers are entered.

2. Enter odometer mileage

3. A PO number should be attained prior to any service being performed. If a PO number is not needed because it does not exceed the dollar limit, the card number should be entered into this field.

3. Enter vehicle into PM Attendant via license plate or VIN lookup and accept.

**pm attendant™**

home > member page > administration > add vehicle

Veh. State CA 6ufz727 Veh by TAG

VIN  Veh by VIN

OR

Year Select

Add Vehicle

Veh Not in ChekChart

If the vehicle has not been serviced before and does not appear under the FMA name, then you will have to add the vehicle.

**pm attendant™**

home > member page > CARFAX QuickVIN

QuickVIN Matches: Please verify vehicle match by clicking Accept Button

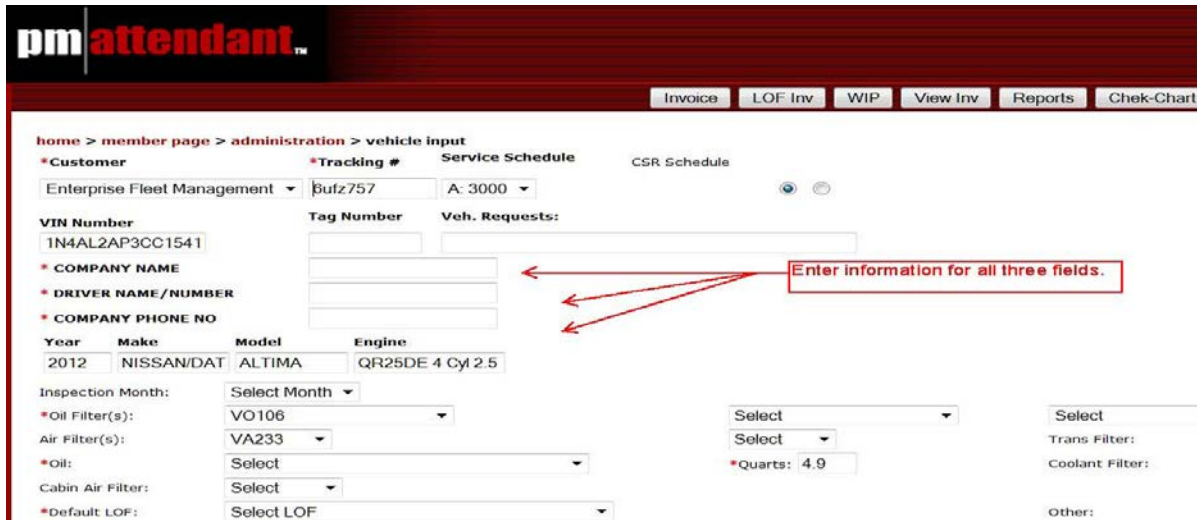
2009 VOLKSWAGEN JETTA TDI 3VWRL71K39M059185 Accept

None of the Above

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4. Enter in Company Name, Driver, and telephone contact info. Again, company name is not the FMA. The FMA is listed at the top as “customer.” The Company name is the name of the company that the driver works for. See below. Click on “Save & Invoice” or “Save & LOF”.



The screenshot shows the 'pm attendant' web application interface. At the top, there are navigation tabs: Invoice, LOF Inv, WIP, View Inv, Reports, and Chek-Chart. The main content area is titled 'home > member page > administration > vehicle input'. Below this, there are several input fields and dropdown menus:

- \*Customer:** Enterprise Fleet Management (dropdown)
- \*Tracking #:** Bufz757 (text input)
- Service Schedule:** A: 3000 (dropdown)
- CSR Schedule:** (dropdown)
- VIN Number:** 1N4AL2AP3CC1541 (text input)
- Tag Number:** (text input)
- Veh. Requests:** (text input)
- \* COMPANY NAME:** (text input)
- \* DRIVER NAME/NUMBER:** (text input)
- \* COMPANY PHONE NO:** (text input)
- Year:** 2012 (text input)
- Make:** NISSAN/DAT (text input)
- Model:** ALTIMA (text input)
- Engine:** QR25DE 4 Cyl 2.5 (text input)
- Inspection Month:** (dropdown menu)
- \* Oil Filter(s):** VO106 (text input)
- Air Filter(s):** VA233 (text input)
- \* Oil:** (dropdown menu)
- Cabin Air Filter:** (dropdown menu)
- \* Default LOF:** (dropdown menu)
- Quarts:** 4.9 (text input)
- Trans Filter:** (dropdown menu)
- Coolant Filter:** (dropdown menu)
- Other:** (text input)

A red box with the text "Enter information for all three fields." is positioned to the right of the Company Name, Driver Name/Number, and Company Phone No fields. Three red arrows point from this box to each of these three fields.

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- Proceed to invoice the customer as normal. Ensure the mileage and PO number is recorded at the upper right hand corner. Ensure driver signature is attained on final invoice and all steps for FMA/ local fleet has been followed.

The screenshot shows the 'pm attendant' software interface. At the top, there are navigation tabs: Invoice, LOF Inv, WIP, View Inv, Reports, Check-Chart, Timedock, Logout. Below this is a breadcrumb trail: home > member page > invoice. The main form area contains several sections:
 

- Enterprise Fleet Management:** PO Box 16540, St Louis, MO 63105, (877)353-8611, ar@fgoil.com
- Unit information:** Unit number: 6UF2757, 2012 NISSAN/DATSUN ALTIMA QR250E 4 Cyl 2.5 L(153), VIN: 1NHAL2AP3CC154102, COMPANY NAME: ARBITRON, DRIVER NAME/NUMBER: 6195508794
- Vehicle Info:** 4.90 qts Castrol GTX 5w30 VO106 VA233
- Service details:** Storage Area: 0008 Rancho, Date of service: 2012/04/11, Mileage at service: [input field], PO #: [input field], Hood Tech: None, Lube Tech: None, Manager: None, Other: None
- Comments:** Previous comments: 2012-04-04:6067 miles:OIL DRAIN PLUG TORQUE TO 25 FT POUNDS. Type comments to display on invoice: [grid of 44 numbered buttons]

 Red arrows point to the 'Mileage at service' and 'PO #' input fields with labels 'ENTER ODOMETER READING HERE' and 'ENTER PO NUMBER HERE' respectively.

## All FMA Phone numbers

Before Calling for a PO#, make sure you have VIN, Driver info, parts and labor pricing, and all other info on the completed and signed SynFast Work Order ready before calling.

To get the PO# for a FMA, refer to each card/company type:

Customer	Address	Phone
<b>ARI</b>	PO Box 789, Mount Laurel, NJ 08054	(800)683-8327 opt # 1
<b>Donlen FMS</b>	2315 Sanders Road, Northbrook, IL 60062	(847) 412-5261
<b>Element</b>	940 Ridgebrook Rd Sparks, MD 21152	(800) 638-7900
<b>Enterprise Fleet Management</b>	P.O Box 16540, St. Louis, MO 63105	(805) 498-6626
<b>G E Fleet Services – Asco Services</b>	PO Box 16063, Minneapolis, MN 55416	(800) 328-6363
<b>Lease Plan Fleet</b>	1165 Sanctuary Pkwy Alpharetta, CA 30009	(800) 323-6644
<b>Map/Wheels</b>	666 Garland Pl Des Plaines, IL 60616	800-477-2211
<b>PHH Arval</b>	P.O. Box 13023, Baltimore, MD 21203-3023	(800) 654-3428

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## FLEET MANUAL



Automotive Resources International

### Automotive Resources Intentional (ARI)

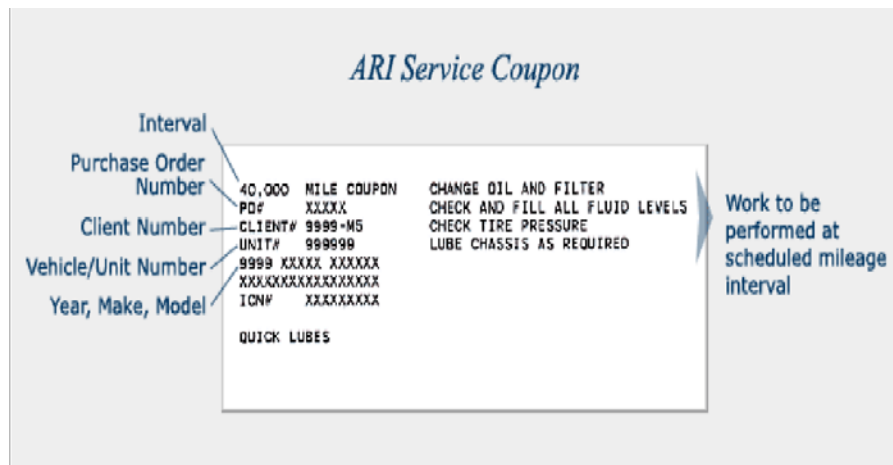
**Service Procedure Requirements: There are 3 different methods of identifying an ARI fleet customer.**

**When searching for this FMA, use "Automotive Resources International" NOT "ARI".**

1. **Coupon Service:** Pre-approved authorized PO# appears on coupon. **DO NOT USE THIS PO#;** Please call **800-227-2273 Option 3** for approval. A PO number will be issued for any work. View our Informational Tutorial detailing Coupon usage procedures. The PO number you attain should be entered in the PO# field of the WIP invoice screen on PM Attendant. Accept the Terms and Conditions and follow the prompts.

If this is your first time processing a coupon service, follow this link or cut and paste or type into your browser to see tutorial. The tutorial lasts less than two minutes.

[https://suppliers.arifleet.com/tm/Coupon%20Service-module\\_files/intro.htm](https://suppliers.arifleet.com/tm/Coupon%20Service-module_files/intro.htm)



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## FLEET MANUAL

2. **Maintenance Card:** Even if a dollar limit is stated on the card, any work done by SynFast requires a PO#. Please call **800-227-2273 Option 3** for approval. A PO number will be issued for any work to be performed. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant. Accept the Terms and Conditions and follow the prompts.



3. **Purchase Order:** You are required to call **800-CARCARE (227-2273)** to obtain a PO number prior to performing any service on the ARI vehicle. Have the VIN# available.

The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.

4. **Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

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## FLEET MANUAL



Donlen FSM

### Service Procedure Requirements:

1. **Donlen FMS must approve all invoices for repairs and maintenance before the work is performed.** A purchase order number will be provided upon approval of any and all repairs.
2. Call Donlen FMS at 1-800-323-1483 and listen carefully to the complete menu options for instructions. Provide the Donlen vehicle number or last eight digits of the VIN and describe, in detail, the services requested and the estimated costs. You must also have the following information available: VIN, type of vehicle (year, make & model) and the current mileage. Be sure to also get the drivers name and phone number.
3. **All invoices submitted for payment without a Donlen Purchase Order number will be returned.** The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.
4. Some Donlen FMS customers utilize the blue SafeCare Preventive Maintenance Program coupon book to authorize preventive maintenance services only. If you are presented with a coupon, call Donlen at 1-800-323-1483 for a Purchase Order; do not use the coupon number for authorization. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.



<b>DONLEN FLEET MANAGEMENT SERVICES</b> 2315 Sanders Road Northbrook, IL 60062 800-323-1483	<b>VEHICLE NUMBER: 54896</b> <b>VIN 1G3WASR5PT3428561</b>	<b>COUPON NUMBER 0378ZB</b>
COMPANY NAME: ADVANCE SALES COMPANY    YR: 00    MAKE: FORD    MODEL: TAURUS FOR ADDITIONAL REPAIRS: CALL DONLEN AT (800) 323-1483		
CHECK & FILL FLUID LEVELS CHANGE OIL AND OIL FILTER LUBRICATION ROTATE TIRES REPLACE AIR FILTER FLUSH COOLING SYSTEM INFLATE TIRES TO MFR SPEC INSPECT BRAKES REPACK BEARINGS - IF APP. SPECIAL INSTRUCTIONS: THIS COUPON IS VOID. ** SAMPLE **		
		<b>NEXT SERVICE DUE AT 30,000</b>
		<b>VALID BETWEEN 29,500-30,500 MILES</b>
Driver's Signature _____ Date _____		MILEAGE <input type="text"/>
VENDOR INSTRUCTIONS ON REVERSE SIDE		

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5. If the vehicle requires additional repairs, call Donlen at 1-800-323-1483, before performing the repairs, for additional authorization. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.
6. If you have a problem locating a part or need assistance with the diagnosis of a particular vehicle, call Donlen FMS at 1800-323-1483 and one of our ASE Certified Advisors will help!
7. When the repair is completed, **be sure your invoice includes a valid Donlen FMS Purchase Order number**, (The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant), Donlen vehicle number, VIN, year, make, model and current mileage. If any additional repairs were required after you received a purchase order, please call Donlen to update the purchase order prior to forwarding it for payment. Any invoices not matching the purchase order will cause delays in payment processing. If the invoice includes charges for PM services, a copy of the PM form must accompany the invoice for payment.
8. **Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

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## FLEET MANUAL



### Element Vehicle Management Services

(Element has taken over GE Fleet and PHH)

#### **Service Procedure Requirements:**

1. Element may present a card. Call 800-638-7900 with VIN number, name of driver, and list of services and prices (parts and labor) for authorization to obtain a PO number. Follow all prompts.
2. Ensure you specify that you are calling SynFast Oil Change. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.
3. **Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

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## FLEET MANUAL



### Enterprise

#### Service Procedure Requirements: There are two types of cards.

1. Enterprise customer will present an Enterprise Maintenance card. An authorization limit will appear on the card (see attached example). If the repairs are within the limits of the card, complete the work and invoice through POS (PM Attendant). The card number (i.e. 690T10BLS527 in the example below) is the Purchase Order number. Enter the **card number** in the **PO #** field in the upper right hand corner of the WIP invoice screen on PM Attendant.
2. However, if the repair estimate exceeds the card limit, call **1-800-325-8838** for approval and a purchase order number **prior to performing the service**. There are two types of cards: a **Full** Maintenance Management Card and a Maintenance Management Card. After confirming the PO number, enter the PO number in the PO# filed in the upper right hand corner of the WIP invoice screen on PM Attendant.
3. **Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

4.

#### Front - Full Maintenance Management Card



#### Front - Maintenance Management card



#### Back - Full Maintenance Management Card



#### Back - Maintenance Management Card



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## FLEET MANUAL

GE Capital



Fleet Services

### GE Capital Fleet Services

GE Capital Fleet was acquired by Element. IF the instructions below do not work for your Service Center location, refer to Element Vehicle Management Services (page 21)

**Service Procedure Requirements: There are three types of cards/ guides.**

1. When the diagnostic/repair estimate **exceeds** the driver authorization limit on the materials presented by the driver or the Decal located on the vehicle/equipment, and **prior** to any repairs, use the below Important phone numbers below **to obtain work authorization number (PO Number) before repairs are started.**
  - Red Drivers Guide, or Green Card (cars and light trucks) : **800-328-6363**
  - White Drivers Guide/Decal (medium or large trucks, equipment, forklifts and trailers): **800-328-6103**
  - Blue Drivers Guide : Most SynFast Service Centers cannot process Blue Driver vehicles due to size.

You will need the following information for authorization:

- \* Fleet and Unit Number (Drivers Guide) \*Log Number (Drivers Guide) \*V.I.N. Number
- \* License Number/State \*Odometer; Hub or Hour Meter Reading/ Year, Make, and Model
- \* Driver Company Name and Driver Name \*Repair Date/ Repair Estimate

**2. At time of invoicing – confirm information on the invoice:**

- Cost of Work Performed (parts, labor, tax and total)
- Invoice Number
- Driver Company and Driver Name
- Work Authorization Number (PO Number) issued by GE Fleet Services on behalf the Customer.

**If the estimate is under the Red or Blue Drivers Guide – use the authorization code from the Drivers Guide or Card**

The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.

**3. Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

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### MAP/Wheels, Inc. Advantage Network

#### **Service Procedure Requirements:**

1. Call MAP Inc. before beginning any work to obtain a Purchase Order (PO) number:
  - Toll free: Cars: 800-477-2211 OR Trucks (medium/heavy duty) 800-477-2298

A Wheels MAP advisor is available to take your call 24 hours a day/7days a week.

- \* Before calling, have the following information ready:
- \* Wheels vehicle number or complete VIN \*Odometer reading
- \* Drivers company name (not MAP or Wheels)
- \* Type of repairs/service required.
- \* For each repair/service have the:
- \* Description \*Labor Time \*Labor cost \*Part Cost \*Estimated time of completion

2. When repairs are completed:

- The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.
- Call 800-477-2211 and select the MAP Automated Payment System option.
- Enter PO number and total amount of bill
- Upon approval, a Visa card number and an expiration date will be issued to use through your credit card machine.
- Additional instructions (ex: faxing a copy of the invoice) may be issued as well. Document the number and expiration date on the estimate.
- After the invoice is finalized and payment has been processed, email the invoice and estimate and type the Visa card number and expiration date used to finalize the transactions in the body of the email. The corporate office will then run a discount credit against the card.
- Ensure the nightly reconciliation of credit card terminal matches the credit amount from daily reconciliation report on POS system.

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## FLEET MANUAL



### Union Leasing

#### **Service Procedure Requirements:**

4. Enterprise customer will present a Union Leasing card. Call 1-847-240-1500 with VIN number, name of driver, and list of services and prices for authorization to obtain a PO number.
5. Ensure you specify that you are no longer a Valvoline and you are calling from SynFast Oil Change. The PO number should be entered in the PO# field of the WIP invoice screen on PM Attendant.
6. **Ensure PO and Authorization information is recorded on SynFast invoice and signature from driver is attained on all invoices.**

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**FLEET MANUAL**

**VOYAGER®**

**Voyager Payment Systems**

We are currently not accepting Voyager payments at this time.

However, once Voyager is set up via PMA, and update will be sent to the field.

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## FLEET MANUAL

# Local Fleet Accounts

### **Service Procedure Requirements:**

Local fleet accounts are net-30 day accounts that are setup directly between the fleet customer and RFG Oil, Inc. Local fleet accounts are companies often headquartered in the city/community where the Service Center is located, and these local fleet accounts are billed directly by our Corporate Office.

Any local company interested in signing up for our local fleet program should be given an application. Forms can be printed from the forms website ([www.rfgoil.com/intranet/forms](http://www.rfgoil.com/intranet/forms)) or contact David Laguana directly to email a form to your Service Center. Any completed forms received at the Service Center level should be forwarded to David Laguana at [fleets@synfastoilchange.com](mailto:fleets@synfastoilchange.com). Refer to the beginning sections of this manual.

\*All of these accounts are set up through PM Attendant to have a 15% discount taken directly from the invoice except for **Unique Transportation**.

1. Ensure driver name and company name are clearly indicated on estimate and invoice.
2. Ensure all of the services and pricing documented on the estimate are reviewed with the driver, prior to performing any service. Attain a signature from the driver on the estimate.
3. Confirm all services performed and the discount has been applied on the final invoice. Attain signature from driver on final invoice.
4. If you do not see the Local Fleet customer listed, please contact David Laguana at the main office at (858) 999-3548 Ext 102 or contact your District Manager directly.

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## FLEET MANUAL

### Local Fleet Listing

Company	Address	Address	City	State	Phone
ADVANTAGE POOLS	500 N. LAKE HAVASU AVE		LAKE HAVASU CITY	AZ	(928) 486-6495
ALL ABOUT FENCING	3511 IROQUOIS DR		LAKE HAVASU CITY	AZ	(928) 453-8617
AMITY FOUNDATION	2260 WATSON WAY		VISTA	CA	(760) 599-1892
ANHEUSER BUSCH (BUDWEISER)	5959 SANTAFE STREET		SAN DIEGO	CA	(858) 864-5542
BAKERSFIELD-AVIS BUDGET GROUP	3701 WINGS WAY		BAKERSFIELD	CA	(661) 392-4160
BAKERSFIELD-ENTERPRISE RENT A CAR	199 N SUNRISE AVE		ROSEVILLE	CA	(916) 787-4500
BONCOR WATER SYSTEMS	245 S. QUINCE STREET		ESCONDIDO	CA	(800) 928-3749
BUSINESS MUSIC & COMMUNICATION, INC	8450 PRODUCTION AVE		SAN DIEGO	CA	(858) 621-2155
CASTRO AUTO TRANSPORT	643 LAXFORD RD		SAN JACINTO	CA	(760) 455-1717
CHRIS NELSON & ASSOCIATES, INC.	31238 VIA COLINAS	SUITE C	WESTLAKE VILLAGE	CA	(818) 991-1040
CINTAS FIRE PROTECTION	1825 W PARKSIDE LANE		PHOENIX	AZ	
DOUG'S FILTER SERVICE INC	1920 MISSION RD		ESCONDIDO	CA	(760) 746-7146
DRAIN MEDIC, INC	P.O BOX 7886		SAN DIEGO	CA	(619) 303-9225
ENTERPRISE RENT A CAR	1444 W AUTO DR		TEMPE	AZ	(480) 705-5005
FARLEY PAVING STONE CO., INC	PO BOX 10946		PALM DESERT	CA	(760) 773-3960
FRONTIER FIRE PROTECTION INC	1090 LAWRENCE DRIVE	SUITE #107	NEWBURY PARK	CA	
H & R STEEL	1710 N MAGNOLIA AVE	STE 102	EL CAJON	CA	
HEMET-AVIS BUDGET	300 CARRIAGE CIR		HEMET	CA	(951) 766-9745
HERTZ-BAKERSFIELD	PO BOX 24210		OKLAHOMA CITY	OK	(661) 634-0889
ICARS ENCINITAS	114 N COAST HIGHWAY 101		ENCINITAS	CA	(760) 215-1043
KS INDUSTRIES LP	6205 DISTRICT BLVD		BAKERSFIELD	CA	(661) 617-1700
LAKE HAVASU AVIS BUDGET	AVIS BUDGET GROUP	( PO# 99100318)			(866) 433-2319
LANDGRAPHICS ENTERPRISES, INC	5752 KEARNY VILLA RD		SAN DIEGO	CA	(858) 541-1600
LEISURE CONCEPTS	2745 N KIOWA BLVD	#101	LAKE HAVASU CITY	AZ	(928) 453-3250
LLOYDS PLUMBING	2630 LAVERY CT# A		NEWBURY PARK	CA	(805) 495-4525
MILEMARKERS THERAPY	1515 LAKE HAVASU AVE N	STE 100	LAKE HAVASU CITY	AZ	(928) 854-5439
MISSION POOLS	755 W GRAND AVE		ESCONDIDO	CA	(760) 743-2605
MOSSY FORD	4570 MISSION BAY DR		SAN DIEGO	CA	(858) 490-3705
PACIFIC NISSAN	4433 MISSION BAY DR		SAN DIEGO	CA	(858) 581-3200
PACIFIC WATER CONDITIONING	905 PAULING DR		NEWBURY PARK	CA	
PUENTE HILLS MITSUBISHI	17665 CASTLETON ST		CITY OF INDUSTRY	CA	(626) 626-4800
PUENTE HILLS SUBARU	17801 GALE AVENUE		CITY OF INDUSTRY	CA	(626) 626-4800
PUROCLEAN	1901 N CHESTER AVE		BAKERSFIELD	CA	(661) 316-3090

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Company	Address	Address	City	State	Phone
R & M REFRIGERATION CO LTD CORP	8724 GOLDEN RIDGE RD		LAKESIDE	CA	(619) 562-9600
RICH ENVIRONMENTAL SERVICE STATION SERVICES	5643 BROOKS CT		BAKERSFIELD	CA	(661) 392-8687
ROTOCO INC DBA ROTO ROOTER PLUMBERS	2141 INDUSTRIAL CT	STE B	VISTA	CA	(760) 598-4292
SAME DAY TERMITE CO INC	PO BOX 5242		HEMET	CA	(951) 927-3638
STALLION MOBILE PA SYSTEMS/(SOUTHWESTERN PRODUCTS)	4031 LAKEVIEW DR		LAKE HAVASU	AZ	(602) 315-0295
SUN WEST PLUMBING	9889 HIBERT ST	STE D	SAN DIEGO	CA	(858) 566-7992
WESTPRO PLUMBING, INC	1130 DELEVAN DR		SAN DIEGO	CA	(619) 239-2112

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