



## The Costa Oil Fleet Program

### What is a Fleet?

A fleet, as it relates to our Costa Oil business, is defined as a group of vehicles within a business or organization. These vehicles can either be owned by the company or by the employees.

Some familiar examples of traditional fleet vehicles include:

- Plumber's and electrician's trucks
- HVAC vehicles
- Utility vehicles (cable, telephone, power, etc.)
- Construction vehicles of all types

However, a fleet can also consists of the following vehicles:

- Corporate employees (manufacturing plants, service industries, etc.)
- Real-estate agents
- Local schools and university staff and personnel
- Churches and other civic organizations

### Why are Fleets Important?

Fleets are a valuable resource to your store for a number of reasons. Included among them are:

**Stability** Fleet vehicles are owned by companies, and are always going to be in need of service, regardless of the economy.

**Consistency** Fleet vehicles are assets of a company, and it's in their best interests to keep them in peak performing condition.

**Profitability** Business owners are often willing to have extra work done. Fleet tickets are often higher than the average.

**Potential** Contact with a single driver can end up having that company bring in their entire fleet of vehicles.





**Loyalty** If you consistently give your fleet customers a fast, professional, and courteous service, they will remain loyal to having services performed at your store.

Regardless of the type of fleet a company or organization may have, the one common denominator is that they all depend on regular maintenance from Costa Oil to help reduce major repair costs and minimize unnecessary downtime. Fleet business represents nearly ten percent of all vehicles at Costa Oil, as they are on the road much more than consumer vehicles and accumulate mileage faster.

**\* Important \***

The number of fleet vehicles, and the frequency we expect them to visit our stores, is used to help determine the type of fleet account we offer them. Costa Oil requires a minimum of **THREE** vehicles in order to qualify as a fleet.

## **How to Identify a Fleet**

Fleet vehicles are everywhere! Some common ways to identify possible fleets include:

- A group of similar vehicles in a business's parking lot.
- Vehicles with a company name on them.
- Drivers paying with a company credit card.

There are hundreds of companies currently in the Costa Oil Fleet Program. If you believe a customer you are servicing may already have a fleet account, be sure to ask them. Knowing that a driver is part of a fleet before you start work on their vehicle will ensure that you service the vehicle according to the company's guidelines – and that is very important!

## **Fleet Leads**

If the company does not have a fleet account, you now have a potential "LEAD". With the driver's permission, get the company name, phone number, and a contact name. Give this information to the Fleet Department (Corporate office in York) and we will contact the company about setting up a fleet account for you.





We ask each store to supply the Fleet Department with leads since you are in constant view of the companies near your location, and these are the customers most likely to visit your store on a regular basis.

We encourage each store to take time each week and observe the vehicles that drive by. Take note of them, look for a company name and phone number, and submit them on the "Lead Sheet" (see below) with your weekly paperwork. The Fleet Department will receive the leads, and contact those companies on behalf of your store. You should always keep a healthy stack of lead sheets on hand and make a habit of submitting them. Please contact the Fleet Department if you need lead sheets.

Region \_\_\_\_\_ Store # \_\_\_\_\_ Month \_\_\_\_\_

### FLEET LEADS

Lead #1	Lead #2
Company Name	Company Name
Contact Person	Contact Person
Phone Number	Phone Number
Fax Number	Fax Number
# of Vehicles in Company	# of Vehicles in Company
Comments:	Comments:
<b>FLEET DEPARTMENT USE ONLY</b>	<b>FLEET DEPARTMENT USE ONLY</b>
Date Received	Date Received
Date Called	Date Called
Date Application Sent	Date Application Sent
Date Account Opened	Date Account Opened
Notes	Notes

**YOU MAY FAX IN YOUR COMPLETED LEAD SHEET TO: 1-877-523-9275**

**\* Important \***

The more information you provide on the lead sheets, the better. At a minimum, try to supply the company name and phone number.





Any additional information you can obtain such as: contact name, address, fax number, and number of vehicles in the fleet, is always helpful.

## **How to Sign Up a Fleet**

To apply for a Costa Oil fleet account, a company must complete a fleet application. Applications should be available at every store, or can be obtained through the Fleet Department. In addition, the customer can either contact, or be contacted by, the Fleet Department to discuss the different options available to them.

**\*\*\*IF NO FLEET SHEET IS AVAILABLE TAKE ALL INFORMATION DOWN ON A PIECE OF PAPER\*\*\***

Once the customer has completely filled out the application, they can either mail or fax it to the Fleet Department in York for approval. The customer is then contacted to confirm that the information on the application is valid. Within one to two business days the account will be loaded into your store's computer, and the new fleet customer is ready to visit your store for service.

## **Identifying the Different Types of Fleets**

Costa Oil services two different types of fleets: National Fleets and Local Fleets. Both fleet types are welcome at our locations, and are very similar in how they are handled. However, there are also very distinct differences between the two.

### **Local Fleets**

Local fleets are set up by Costa Oil's Fleet Department, and can only be serviced at Costa Oil stores owned by Costa Oil. These fleets are usually set up by locally owned and operated companies, and are often based very close to one or more of our stores. These companies have chosen Costa Oil to be the provider of services for their vehicles, and have complete control over how their account is handled.

There are two types of local fleets, *billed* and *cash*, which offer different options of how services are paid.





- **Local “Billed” Fleets**

Local fleet customers that have a billed fleet have chosen to be invoiced for services, rather than paying at the time of their visit. Their drivers **do not pay** while in the store. Instead, they simply sign the invoice, and go about their business. The company will receive a monthly bill, from our corporate office, for any services performed, and pay from that.

Our billed fleet customers view this as a great value, which saves the company both time and money.

- **Local “Cash” Fleets**

Local Cash Fleets are set up so all services must be paid for at the time of service. Acceptable forms of payment with a cash fleet are cash, check, or credit card.

Cash fleets are used in two cases:

“Employee discount” - This is most commonly used by large groups or companies where the drivers are responsible for their own payment. We use this as an incentive (with a small discount) for employees to bring their personal vehicles to Costa Oil.

“Drivers pay at the time of service” – Some companies prefer the option of allowing their drivers to pay at the time of the service to receive an immediate discount. It is really a matter of preference on behalf of the company on how they want to reimburse their drivers for using Costa Oil services.

**\* Important \***

If a customer ever comes in and says “I work for Company, and we get a discount at Costa Oil”, chances are we have a Cash fleet in the system for them. You will need to search the fleet accounts for the company’s name in order to find their Cash fleet.

If you can’t find it, be sure to call the Fleet Department for assistance.

## **Fleet ID Cards**

Many Local fleets have Fleet ID cards issued when their account is opened. The Fleet ID cards are a tool that helps both the store and driver. For the store, it automatically identifies the driver as a fleet customer, and gives them the name of the company under which their account is listed. For the driver, it removes any uncertainty of what needs to





be said to make sure their invoice is attached to the correct fleet. For both parties, it helps by speeding up the entire transaction.

**Please Note:** Local Fleets are **NOT** required to have Fleet ID cards. Some companies choose not to have them issued to their drivers, and prefer them to verbally let our stores know that they have a fleet account. Either method is acceptable for letting us know they have an account. **NEVER TURN AWAY A CUSTOMER IF THEY SAY THEY DON'T HAVE A FLEET ID CARD.**



**NOTE:** Some customers may have the old style Fleet ID Cards. They are still valid for use.

**FRONT BACK**

### **National Fleets**

National fleets are accounts set up by Costa Oil International (COII) for use at all Costa Oil locations throughout the country. National fleets are very similar to Local fleets in





that they have specific rules and requirements, as well as being set up as either billed or cash fleets.

- **National “Billed” Fleets**

National fleet customers that have a billed fleet have chosen to be invoiced for services, rather than paying at the time of their visit. Like the Local fleets, their drivers **do not pay** at the time of the service. Instead, they simply sign the invoice and go about their business. However, in the case of National fleets, COII accumulates the invoices, and bills the company on a monthly basis for those services performed in your store.

National fleets have a number of places they can go for vehicle maintenance. We are **NOT** the only place they are authorized for service. It is very important that we make them feel welcome, and make them want to come back again and again.

- **National “Cash” Fleets**

National Cash Fleets are set up so all services must be paid for at the time of service. Acceptable forms of payment with a cash fleet are cash, check, or credit card. Just like with the Local cash fleets, these are set up either as a discount program for employees, or to be used by companies that prefer their drivers pay at the time of service.

## **How to Locate Fleet Accounts in the System**

Once you have identified that a customer is a fleet, the next step is finding their fleet in the computer system. As was previously mentioned, fleets can come in two forms, Local and National. There is a basic way to look up both types of accounts, with subtle differences for each.

### **Finding a Local Fleet**

Starting from the **Item/Service** screen, begin by pressing the **Popup** key then press the letter “**F**” on the keyboard. Next, the **Select Business Account** screen appears.

**\* Important \***

With every local fleet, there is a two-letter Region Code before the company name. Depending on your region, there are different codes unique to your region.





## Two-Letter Region Codes

AT Atlanta                      PL Pittsburgh  
CA North Carolina            TN Nashville  
OH Cincinnati and Dayton   VA Richmond and Tidewater

Once you have determined your Region Code, enter the **two letters**, followed by a **space**, and the **first few letters** of the company's name. Once you locate the correct fleet from the list that appears, select it, and the vehicle will be attached to the fleet.

**HELPFUL TIP:** Enter the first few letters of the company's name to make it easier to avoid possible misspellings. The more letters you enter, the more difficult it may be to locate the account.

Some companies have unusual spellings or abbreviations for their name. Example: Fast X-Press Couriers.

You might think "X-Press" is spelled "Express". However, should you enter the entire company name as "Fast Express Couriers", it will not show up. You would have to enter it as "Fast X-Press Couriers" in order for it to appear. It is for this reason that we ask you to enter only the first few letters of the name. By entering "Fast", you would see ALL companies that start with the word "Fast", from there it's a simple scroll down to locate the proper account.

## Finding a National Fleet

Starting from the **Item/Service** screen, begin by pressing the **Popup** key then press the letter "**F**" on the keyboard. Next, the **Select Business Account** screen appears. Once the window opens, you will enter the first few letters of the company name.

### **\* Important \***

**DO NOT** use the region code for National fleets. Region codes are used exclusively for Local fleets. Once you locate the correct National fleet, select that fleet, and the vehicle will now be attached to it.





## **Entering Customer Information**

The customer information fields are a very important part of our business. It gives us the ability to follow up with customers should the need arise. As it relates to fleets, it is critical that we fill in this information correctly. Should there be any problems with the invoice after the sale, we need to have a way to contact the customer. For that reason, we ask that you enter and verify the information on every fleet visit.

Because of the differences with Local and National fleets, and how they are billed, there are subtle differences in the information we need to collect.

### **National Fleet Customer Information**

When entering a National fleet into the computer system, be sure to gather your customer information in this manner:

LAST NAME: Driver's Last Name

FIRST NAME: Driver's First Name

ADDRESS: Driver's Address CITY, STATE, ZIP: Driver's Address PHONE: Driver's Phone Number

### **Local Fleet Customer Information**

When entering a Local fleet into the computer system, be sure to gather your customer information in this manner:

LAST NAME: Company's Name (Last Part of the Company Name) FIRST NAME: Company's

Name (First Part of the Company Name) ADDRESS: Company's Address

CITY, STATE, ZIP: Company's Address

PHONE: Company's Phone Number





**Example:** If a company's name is "Alexander & Sons Plumbing", you would enter:

LAST NAME: FIRST NAME:

Plumbing Alexander & Sons

When printed on the invoice, it will read correctly as "Alexander & Sons Plumbing"

**Example:** If the company name is a single word, like "UTEX", you would enter:

LAST NAME: FIRST NAME:

Company UTEX

When printed on the invoice, it will read correctly as "UTEX Company"

**HELPFUL TIP:** The company name must be split up to meet the first and last name field requirements.

## Service Approvals / Authorization

In addition to our Signature Service Oil Change, Costa Oil offers a number of important preventive maintenance services that our fleet customers need. They rely on their vehicles to be in peak performing condition, and are often willing to have additional services performed. Like all Costa Oil customers, they appreciate being informed of their vehicle manufacturer's recommendations offered during our Service Review.

It is very important that you understand the guidelines and procedures required by our fleet customers. Each company has their own set of rules that you and their drivers need to abide by when it comes to services performed. For this reason, a number of fleets, both Local and National, require some form of approval for services other than an oil change.

### **\* Important \***

The guidelines for every fleet we service will appear in the notes displayed on the computer once the vehicle is attached to the proper fleet. You must follow these guidelines EXACTLY. Failure to do so may result in the company rejecting the invoice, and refusing to pay for those services.





## Other Key Indicators of Fleets

In addition to the important notes in your computer, there are a few other tools available to you when dealing with fleet customers.

### Service Card (National fleets)

Many National fleets issue service cards to their drivers. These cards usually have a pre-set dollar limit, or certain services the driver can authorize. If you are recommending additional services, and the total for the invoice exceeds the dollar limit, or are not listed on the service card, you must call the national fleet company for authorization on those services. *You cannot perform those additional services unless the national fleet gives prior authorization.*

### Coupon Drivers Guide (National fleets)

Other national fleets issue coupon books to their drivers which lists the services requested for a given mileage. The driver is issued a book for their particular vehicle, which contains these coupons. If any services not listed on the coupon are requested or recommended, you must call the National fleet for an authorization on those services prior to performing them. Failure to get authorization for services not listed on the coupon will result in the invoice being rejected, and you will not be paid for those services.

### Calling for Authorization (Local fleets)

Some local fleets require that you call their office to request authorization on additional services. These calls will be necessary in two cases: If the invoice exceeds a certain dollar limit, or you perform services not listed as an approved service in the notes for the account.

- **Dollar Limit:** Some fleets establish a pre-set dollar limit for their vehicles. If the invoice is going to be more than the dollar limit, you must call the fleet for authorization BEFORE you begin performing services. Failure to do so may result in not being paid for the invoice.





- **Approved Services:** Some local fleets choose to limit the services a driver can authorize. When you recommend a service not listed as an approved service, you must call the driver's company to get approval to perform those services. Failure to do so may result in not being paid for the invoice.

## Ring-out

The ring-out procedure is the perfect time to verify the customer's information and services performed for each fleet. Please use this time to verify that the name, address, and phone number supplied is correct. Remember:

**Local fleets require:** Company name, address, and phone number

**National fleets require:** Driver name, address, and phone number

Also, be sure to confirm that the driver's vehicle is attached to the correct fleet, and all rules for the account have been followed. If the driver has supplied you with a coupon from his National fleet coupon driver's guide, be sure to attach the coupon to the store's copy of the invoice.

Take time to also verify that the information on the vehicle itself is correct. Have the driver confirm the vehicle description and mileage, and check that all requirements for the account are in proper order.

Remember, taking a couple of extra seconds at the ring-out to double check your work will ensure that your store is being paid for all the services performed.

Finally, upon completion of the sale, have the customer sign the invoice, and give them the pink copy. Thank them for coming in, and welcome them to come back again. Taking that extra moment to smile and thank your customer can yield many positive returns in the future.

## Glossary of Fleet Terms





**AUTHORIZER'S NAME** This is the person whom you call to obtain approval for the services.

**AUTHORIZATION NUMBER** When contacting a National fleet, this is the number given by the person that has approved the services.

**BA ID** Account code used to identify a fleet.

**BILLED FLEET** Also known as a **charge** fleet for Local and National fleets having the ability to charge their services at our stores.

**CASH FLEET** Fleet that is set-up as a discount program for a company or group. Cash fleets must pay at the time of service by cash, check, or credit card.

**CLIENT COMPANY NAME** The name of the company the driver works for.

**COUPON DRIVERS GUIDE** Service book that is given to some National fleet drivers. It contains coupons for services to be performed at scheduled mileage intervals as well as important vehicle information. Coupons should be removed from the book at time of service and attached to the store's copy of the invoice.

**DEPARTMENT** Some companies ask that we track what department a driver works in. Your driver will be able to provide this information.

**EMPLOYEE NUMBER** Identification number given to employees by some fleets. Your driver will be able to provide this information.

**EXPIRATION DATE** Some company fleet cards are printed with a date showing how long the card is valid.

**FLEET** A group of vehicles under one business or group.  
Also known as a **business account**.

**FLEET ID CODE** Unique group of letters and/or numbers given to a fleet for tracking and accounting purposes. Also known as a **BA ID**.





**FLEET DEPARTMENT** A sub-department of the Costa Oil Marketing Department, located in the York corporate office, the Fleet Department is responsible for setting-up and maintaining fleet accounts, and providing store support.

**FLEET NAME** A Local or National company name for which the fleet belongs. Also may include the name of the Management Company for National fleet vehicles.

**FLEET LEAD** Any potential company that might be interested in setting up a fleet account with Costa Oil.

**GROUPED** Information field used with National fleets. Most commonly used when the driver may have a coupon, service card, or purchase order number. Allows information to be entered into that respective field.

**COII** Based in York, TX, Costa Oil International is responsible for setting up and maintaining all National fleets.

**LEASING COMPANY** Group that owns a large amount of vehicles, and leases them to companies for a certain amount of time.

**LOCAL FLEET** Fleet accounts that are set-up and maintained directly with Costa Oil, and are only valid at Costa Oil-owned Costa Oil stores.

**NATIONAL FLEET** Fleet accounts that are set-up through COII, and are valid at any Costa Oil in the country.

**OPTIONAL** Information that may be needed on select National fleets, depending on the circumstance. Used in instances where additional approval is needed for services and a field is needed to record the information provided. (Usually authorizer's name or authorization number).

**PURCHASE ORDER #** Also referred to as a P.O. number. It serves as an authorization for specific services. The fleet company provides this number and is used as a reference for them to track the services they have allowed their drivers to perform.

**REGION CODE** A two-letter code used to identify your operations region. **ALL** Local fleets must have the proper region code placed before the company name in order to be correctly found.





**REQUIRED** Information fields listed as “REQUIRED” must be filled-in for the invoice to be completed. Failure to fill-in these fields will result in an incomplete invoice, and will not be able to be rung out.

**SERVICE CARD** A card given to National fleet drivers. Used for identification purposes, and contains information needed to complete the requirements for the invoice.

**VEHICLE/UNIT NUMBER** Number used by a fleet company to identify their vehicles. Numbers can be located either on the vehicle, by asking the driver, or on the National fleet coupon.

**VIN NUMBER** Vehicle identification number located in the lower corner of the windshield on the driver’s side of the vehicle.

