



SETUP & USE FLEET TEAM WITHIN VAST

VAST Enterprise

**Instructions for
VAST Enterprise Retail v 6.10 or Greater
And
VAST Multi-Store v 2.10 or Greater**

REQUIREMENTS

- **VAST Point of Sale Version 6.10 or higher** is required in order to use the VAST Fleet Team functionality.
- You must have a **high-speed internet connection** installed at each shop where you will be using the Fleet Team functionality.

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**If you have any questions or need assistance with these instructions, please contact:
Vast Support at 1-800-803-9762.**

INTRODUCTION

This document will provide you with instructions on how to setup VAST for use with Comdata Fleet Team National Accounts. Comdata's Fleet Team Web application tracks invoices and payments for commercial fleet accounts. This document will explain how to complete the one-time setup process, and how to use the Fleet Team features in order to create estimates and invoices for applicable commercial fleet customers through the Point of Sale.

MAINTENANCE SETUP

CONTROL FILE

1. Open **VAST MAINTENANCE**.
2. Then click on the **CONTROL FILE** icon and select the **OPERATING SYSTEM** tab.
3. Put a checkmark in the “**Using Fleet Team**” checkbox, as shown below.

The screenshot shows the 'Operating System' tab in the VAST Maintenance application. The 'Using Fleet Team' checkbox is checked and highlighted with a red box. An orange arrow points from the top of the screen down to the checkbox. Other options include 'Using Citrix or Terminal Server', 'Using OpenWebs', 'MS Message Queue Path', 'Using Webservices', 'Using Auto Part Price Update', 'Invoice Type' (set to 01), 'Using WorldPac', 'Using PartsXchange', 'Using Commerce Server', 'Using Tire Trading', and 'Default Acct Code for Tires' (set to 99999).

4. Then click **DONE** and **OK** to save your changes and exit the screen.
5. You will then need to close and reopen VAST Maintenance in order for your changes to take effect.

SECURITY OPTIONS

1. From the VAST Maintenance main menu, go to the **SECURITY OPTIONS** screen.
2. Find the “**Fleet Team Web Service Maintenance**” item and drag it into the security setting of your choice.
3. Then click **SAVE** to save your changes. You will then need to close and reopen VAST Maintenance again in order for your changes to take effect.

FLEET TEAM WEB SERVICE MAINTENANCE

1. From the VAST Maintenance main menu, go to the **FLEET TEAM WEB SERVICE MAINTENANCE** icon, as shown below.



Fleet Team Web Service Maintenance

****NOTE:** *Multi-Store Users:* The following steps can be done at the office and sent down to all stores.

2. You will be taken to the **GENERAL** tab with several options available to you on this screen. Put a checkmark in each of the checkboxes that are applicable to your business.
 - Most users will want to uncheck “Allow creation of new Fleet Team COMDATA Card customer from POS”.
 - Most users will want to check “Allow creation of new Fleet Team COMDATA Card vehicle from POS”.
 - Most users will want to check “Allow creation of other (not NA or COMDATA) Customer and/or vehicle from POS”.

Fleet Team Web Service

General Shops Shop Web Parameters

Allow creation of new customers/vehicles at Fleet Team site from Point of Sale

Allow creation of new Fleet Team National Account customer from POS

Allow creation of new Fleet Team National Account ship-to customer from POS

Allow creation of new Fleet Team National Account vehicle from POS

Allow creation of new Fleet Team COMDATA Card customer from POS

Allow creation of new Fleet Team COMDATA Card vehicle from POS

Allow creation of other (not NA or COMDATA) Customer and/or vehicle from POS

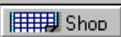
COMDATA phone number - Ext

COMDATA contact instructions:

3. Then click **SAVE** to save your changes.
4. Next, click on the **SHOPS** tab. If this is the first time you are entering this screen, no shops will be listed.
5. Click the **ADD NEW** button. You will be taken to the shop web parameters screen, as shown on the following page.

Fleet Team Web Service

General Shops **Shop Web Parameters**

Company: 1050 

URL:



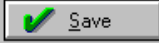
Name Space:


User ID:

Password:

Record Count Limit: 1000 Disable

You must be connected to the Internet before pressing Test Connection

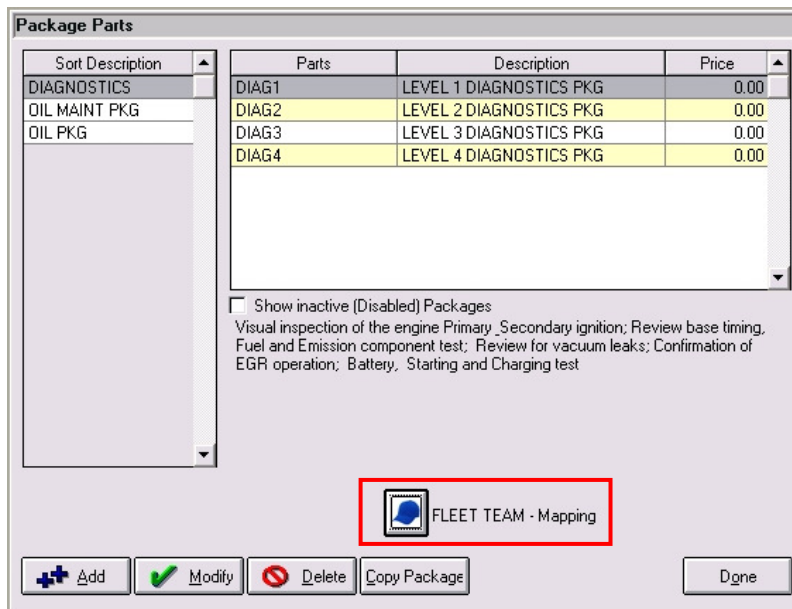


6. Enter the information provided to you by Fleet Team in each of the corresponding fields on this screen.
7. Then enter “**1000**” in the “**Record Count Limit**” field.
8. When you have finished entering the information, click on **SAVE**.
9. Then click the “**TEST CONNECTION**” button to verify that the connection works. You should see a message box appear on the screen alerting you that you have successfully connected to Fleet Team.
10. Then click **DONE** to exit the screen.

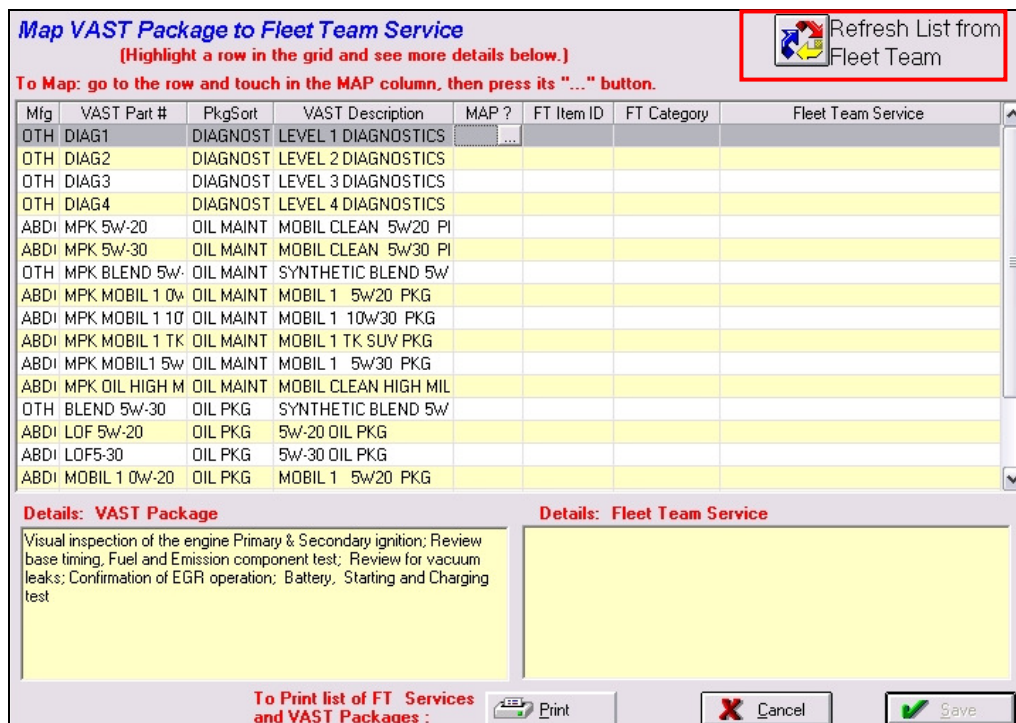
****NOTE:** *Multi-Store users:* You will need to repeat steps 5-9 to add a record for each one of your shops that will be using Fleet Team. On the **SHOP WEB PARAMETERS** screen, you will see an additional button named “**Shop**” which you can use to select each store. By default, the send to shop flag will be set for you automatically and the information will be sent down to your stores the next time you run an Office End of Day.

PACKAGE PARTS – MAPPING FLEET TEAM SERVICES

- Next, you will want to map your packages to the Fleet team maintenance services, to save time during the estimating process. To do this, go to the **PACKAGE PARTS** icon from the VAST Maintenance main menu.
- Then click on the “**Fleet Team Mapping**” button, as shown below.



- You will be taken to the following screen. First, click on the “**Refresh List from Fleet Team**” button, as shown below. You should see a message box appear alerting you that the refresh was successful.



- Then, click inside the “**Map**” field on the first line item, you will see an ellipsis button [...] appear inside the field. Click on the ellipsis button and you will see the following screen appear.

VAST Package:

Mfg	VAST Part #	PkgSort	VAST Description	FT Item ID	FT Category	Fleet Team Service
OTH	CKPAD_1	Brake	CARKEEPER PAD			

CLEAR the current mapping

(Highlight a row in the grid and see more details below.)

Select 1 Fleet Team Service to map to this VAST package by double-clicking on a Fleet Team Service row below.

FT Item ID	FT Category	Fleet Team Service
170849	Brakes	Brake Pads
174491	Brakes	Brake Rotor
170852	Electrical	Computer Replacement
170856	Transaxle/Transmission	Flush Transmission
170855	Suspension	New Struts
170857	Tire Mounting	New Tires
170850	Engine	Oil Change
170851	A/C Services/Fees	Recharge A/C
170853	Suspension	Shocks
170861	Passenger Services	Something
170862	Engine	Tune Up

Details: Fleet Team Service

Brake Pads

Fleet Team Service Selection

Cancel Save

- A list of the fleet team services will appear in the lower portion of the screen. Double-click on the Fleet Team service that most closely matches the package part number you selected. The details will appear under the “FT Item ID”, “FT Category” and “Fleet Team Service” columns in the grid on the top right side of the screen, as shown below.

VAST Package:

Mfg	VAST Part #	PkgSort	VAST Description	FT Item ID	FT Category	Fleet Team Service
OTH	CKPAD_1	Brake	CARKEEPER PAD	170849	Brakes	Brake Pads

CLEAR the current mapping

- If at any time you make a mistake, you can click on the “**CLEAR the Current Mapping**” button to remove the association.
- Then click **SAVE** to be returned to the “**Map Package to Fleet Services**” screen. You will want to repeat these steps to map each package part number to a Fleet Team service.
- If you would like to print a list of the Fleet Team Services and a list of the VAST Package parts, click the **PRINT** button.
- When you are finished with the mapping process, click **SAVE** to exit the screen and return to the VAST Maintenance main menu.

PAYMENT TYPES

Next, you will need to create two payment types for your Fleet Team services; one for Comdata and one for Fleet Team National Accounts. If you already have an existing payment type for either of these items, you can choose to modify them instead of creating new payment types. The only requirement is that these payment types are setup as either House or Invoice Accounts.

1. Click on the **PAYMENT TYPES** icon from the VAST Maintenance main menu.
2. Click the **ADD NEW** button.
3. You will be taken to the **PAYMENT TYPES DETAIL** tab.
4. Enter the **PAYMENT TYPE CODE** and **PAYMENT TYPE DESCRIPTION** into the fields shown. You will need to make sure that this information is different than any of the other existing payment types, and that the description is meaningful and specific, since this is what will be displayed on the payment screen in the point of sale. (Some suggestions for descriptions are “NATL FLEET TEAM” or “COMDATA FLEET”)

5. Then click on the **ACCOUNT TYPE** dropdown and select either **HOUSE ACCOUNT** or **INVOICE ACCOUNT**, depending on your preference for managing and reconciling your Fleet Team invoices. Below is a brief description of the differences between these two types of accounts:

HOUSE ACCOUNT – This is a standard Accounts Receivable account where each invoice is entered into an AR account under the customer/driver that it was billed out to. For Fleet Team invoices, this means that you will need to go into each individual driver’s AR account to reconcile your payments.

INVOICE ACCOUNT – This is a type of Accounts Receivable account where each invoice is entered into one AR account under the payment type code. For Fleet Team invoices, this means that you can

reconcile **all of your Fleet Team accounts** at once, by looking up the payment type code in the ROA or Accounts Receivable screens. *It is important to note that the customer history is not affected by using this method. If you look up the invoice number in history, it will still appear under whichever driver's name it was billed out to.

For example - in the picture above you can see that we have the payment type code set as "NFT". If we need to reconcile our Fleet Team payments, we can go to the ROA screen and enter "NFT" as though it were a customer name, and ALL of the invoices we have done for any of our Fleet Team Accounts will appear.

6. Then put a checkmark in the "POS PAYMENT" checkbox under the "USAGE" section.

****NOTE:** Do **NOT** put a checkmark in the "National Account" checkbox

7. At the bottom of the screen, put a checkmark in the "Is this a Fleet Team only payment type?" checkbox.
8. Then click on the "Fleet Team Pay Code" drop-down and select the appropriate item from the list. For example, if you are creating the "COMDATA" payment type, you would select "COMDATA" from this list. If you are creating the "National Account" payment type, you would select "NATIONAL_ACCOUNT" from the list.

****NOTE:** *Multi-Store Users:* Put a checkmark in the "CREATE TEXT FILE" checkbox to send these changes down to the stores.

9. Then click **SAVE** to save your changes.
10. You will need to repeat steps 28 – 36 to create the second Fleet Team payment type. Remember, you must create **both** a "National Fleet Team Account" payment type **AND** a "Comdata" payment type.
11. When you have finished creating or modifying both payment types, please click **DONE** to exit the screen and return to the VAST Maintenance main menu.

CUSTOMER TYPE DEFAULT PAYMENT TYPE

****NOTE:** Only dealers who have done a Fleet Team setup procedure prior to upgrading to VAST Version 6.10 need to complete the steps in this section.

1. Open **VAST MAINTENANCE** and go to **CUSTOMER TYPES**.
2. Double-click on your Fleet Team Customer Type. This will typically be **Customer Type 25**. You will be taken to the **CUSTOMER TYPES DETAIL** tab, as shown below.

The screenshot shows the 'Customer Type Detail' window for Customer Type # 25. The description is 'NATIONAL FLEET TEAM ACCOUNT'. The 'Percent' is set to 0, with the 'Discount' radio button selected. The 'Payment Type' is set to 'None', with the 'Default' radio button selected. The 'Labor Charge' and 'Taxable' checkboxes are checked. The 'Display in POS' checkbox is also checked. The 'Save' button is highlighted with a green checkmark.

3. Click on the **PAYMENT TYPE** drop-down menu and select **"NONE"**.
4. Then change the radio button next to the payment type to **"DEFAULT"**.
5. Verify that the **FLEET TYPE** dropdown is set to **"NONE"**.
6. Verify that there are checkmarks in both the **LABOR CHARGE** and **TAXABLE** checkboxes.
7. Then click **SAVE** to save your changes.

****NOTE:** *Multi-Store Users:* Put a checkmark in the **"CREATE TEXT FILE"** checkbox.

8. Then click **DONE** to exit the screen.

USING FLEET TEAM IN POINT OF SALE

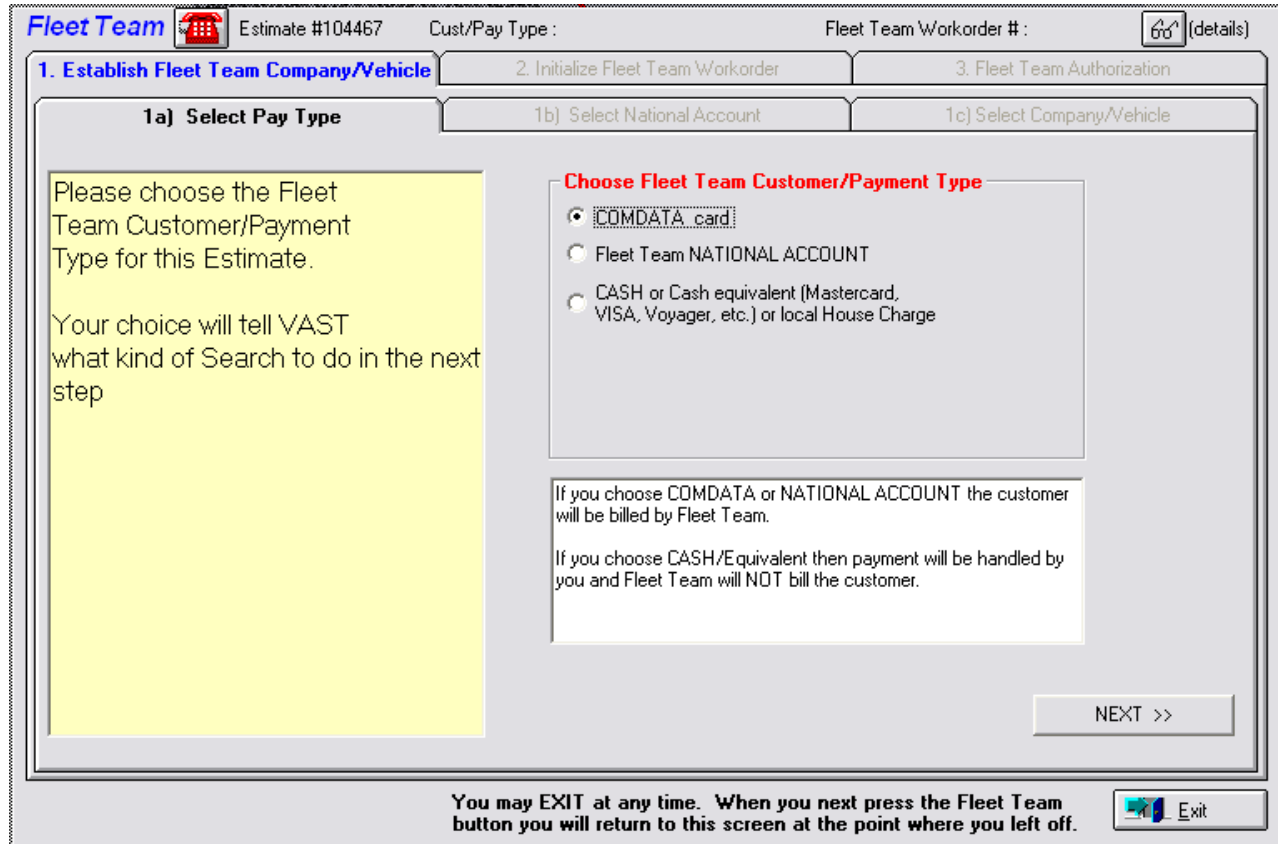
The following section will explain the step-by-step process for creating Fleet Team workorders within VAST. In summary, the process will work as follows: you will create a workorder for a commercial customer that has already been established with Fleet Team, you will then need to perform a Fleet Team initialization to notify Fleet Team that a workorder should be started, you can then add lineitems to the workorder from within VAST. When the workorder is ready to be invoiced, you will need to get a pre-authorization for the workorder from Fleet Team (you may need to do this several times if you change any lineitems on the workorder before it is ready to be invoiced) and then you can invoice out the workorder. Please see the steps below for a detailed explanation of this process, and the new screens that have been added to VAST in order to provide you with integration to Fleet Team.

CREATING A FLEET TEAM INVOICE

1. Open **VAST POINT OF SALE** and create a new workorder.
2. On the **CUSTOMER CONTACT** screen, enter the customer and vehicle information for the commercial customer. For Fleet Team invoices, the customer should be the fleet customer (Business) rather than the driver. For Fleet Team National Accounts, the customer should be the Fleet customer under that National Account, not the National Account itself.
3. At the bottom of the screen, put a checkmark in the “**Will this be a Fleet Team invoice?**” checkbox, as shown below.

****NOTE:** You also have the opportunity to select this checkbox at a later time during the estimate process. If you have all of the customer and vehicle information entered, it is recommended that you do it on this screen. Otherwise, you may want to wait until you have all of the customer and vehicle information at hand, to make searching in Fleet Team easier for you.

4. Then click **NEXT**. You will be taken to the “**1a) Select Pay Type**” tab on the Fleet Team integration screen, as shown below.



Fleet Team Estimate #104467 Cust/Pay Type : Fleet Team Workorder # : (details)

1. Establish Fleet Team Company/Vehicle 2. Initialize Fleet Team Workorder 3. Fleet Team Authorization

1a) Select Pay Type 1b) Select National Account 1c) Select Company/Vehicle

Please choose the Fleet Team Customer/Payment Type for this Estimate.

Your choice will tell VAST what kind of Search to do in the next step

Choose Fleet Team Customer/Payment Type

COMDATA card

Fleet Team NATIONAL ACCOUNT

CASH or Cash equivalent (Mastercard, VISA, Voyager, etc.) or local House Charge

If you choose COMDATA or NATIONAL ACCOUNT the customer will be billed by Fleet Team.

If you choose CASH/Equivalent then payment will be handled by you and Fleet Team will NOT bill the customer.

NEXT >>



You may EXIT at any time. When you next press the Fleet Team button you will return to this screen at the point where you left off. Exit

****NOTE:** Please note that you can click the **EXIT** button to exit from the Fleet Team integration screen at any time. VAST will keep track of what step in the process you are on, so that when you return to this screen, you will be returned to the next logical step in the process. Also, please notice that there are notes in the yellow textbox on the left side of the screen, and the white textbox on the bottom of the screen, which give you directions on how to complete each step, and explains the choices that are available to you. Please use these notes to help you make your selections while completing the steps in this section.

5. You will first need to select the payment type that will be used for this customer by clicking on the corresponding **radio button**. Then click **NEXT**.
6. Depending on which payment option you selected, you will be taken to one of two screens:

If you selected the “**Fleet Team NATIONAL ACCOUNT**” payment type:

- You will be taken to tab “**1b) Select National Account**”, as shown below.
- You can use the radio buttons to select whether you want to search by the Account Number or National Account Name.
- After you have entered your search criteria, click the “**Search Fleet Team for National Account**” button. Your search results will appear in a grid below.

Fleet Team  Estimate #104467 Cust/Pay Type : NATIONAL_ACCOUNT Fleet Team Workorder # :  (details)

1. Establish Fleet Team Company/Vehicle 2. Initialize Fleet Team Workorder 3. Fleet Team Authorization

1a) Select Pay Type **1b) Select National Account** 1c) Select Company/Vehicle

To change the selected National Account customer you may highlight another customer in the grid and press 'Select National Account', or you may press 'Clear my Selection' and do a new Search.

Search Fleet Team for the National Account

by: National Account - Account Number

by: National Account Name
 (You may enter partial Name. Fleet Team will return all National Accounts whose name contains what you've keyed.)

Search Fleet Team for National Account


National Accounts found by Search

FT ID	NA Acct#	National Account Name and Address
316477	1480006576	American Lawn and Landscaping Incorporated, 330 Freedom Blvd., Yorktown VA 23692

Highlight the correct National Account and press Select: **Select National Account**

Selected National Account: **Clear my Selection. I need to Search again**

American Lawn and Landscaping Incorporated, 330 Freedom Blvd., Yorktown VA 23692

You may EXIT at any time. When you next press the Fleet Team button you will return to this screen at the point where you left off.  Exit

- d. If the correct customer appears, click on it to select it and then click **“Select National Account”**. You will see the details for the company appears under the **“Selected National Account”** label (highlighted above).
- e. If you do not see the correct company, you will need to select any company first, using the steps above, and then you can click on the **“Clear my Selection. I need to search again”** button to try different search criteria.

If you selected either the “**COMDATA Card**” or “**CASH Equivalent**” payment types:

- You will be taken to tab “**1c) Select Company/Vehicle**”, as shown below.
- You can use the radio buttons to select whether you want to search by the Fleet card Account Number, Customer Name, VIN, License, Unit# or Zip/PostalCd.
- After you have entered your search criteria, click the **SEARCH** button. The customer and vehicle search results will appear in a grid below.

Fleet Team Estimate #104467 Cust/Pay Type : COMDATA Fleet Team Workorder # : [details]

1. Establish Fleet Team Company/Vehicle 2. Initialize Fleet Team Workorder 3. Fleet Team Authorization

1a) Select Pay Type 1b) Select National Account **1c) Select Company/Vehicle**

If this is the correct company and vehicle press SELECT. Otherwise, choose different search criteria and press SEARCH again.

Search Fleet Team for the Company and Vehicle

by: Vehicle Fleet card Account Number:
 by: Company Name:

by: VIN:
 by: Zip/PostalCd:

by: License:
 by: Unit#:

SEARCH

If multiple Companies please highlight the correct one

Fleet ID	Company name and address
316495	Ecola Services, 15314 Devonshire Street, Mission Hills CA 91345

Add Company to Fleet Team

Vehicles for Company highlighted above. If multiple vehicles please highlight the correct one.

Year	Make	Model	VIN	License	Unit	Engine
2004	TOYOTA	TACOMA	5TENL42N14Z351535	7j84172	10	L4, 2.4L
2004	TOYOTA	TACOMA	5TENL42N44Z347625	7je4205	15	L4, 2.4L
2003	CHEVROLET	S10	1GCCS14X238133742	7e38174	07	V6, 4.3L (262 CID); 90 DE
2003	CHEVROLET	S10	1GCCS14X738130965	7e38175	08	V6, 4.3L (262 CID); 90 DE

Add Vehicle to Fleet Team

FT Web Vehicle History

SELECT

<< PREV NEXT >>

You may EXIT at any time. When you next press the Fleet Team button you will return to this screen at the point where you left off. **Exit**

- If the correct information appears, click on the proper company and vehicle information to highlight it and then click the **SELECT** button.
 - If you do not see the correct information, you have the option to change your search criteria and click **SEARCH** to perform the lookup again.
 - If you have selected a company in error, you can click on the “**Clear (undo) Selection**” button in the lower left corner to re-enable the search fields.
 - If you would like to view the prior Fleet Team history for this vehicle you can click on the “**FT WEB VEHICLE HISTORY**” button, which will bring up a separate web page with the history information.
 - If necessary, you also have the option of either adding the company, or adding the vehicle. To add a company, click on the “**Add Company to Fleet Team**” button. A new screen will appear where you can enter all of the company information, then click the **BUILD** button to save it.
 - To add a vehicle, click on the “**Add Vehicle to Fleet Team**” button. A new screen will appear where you can enter the vehicle information, then click the **BUILD** button to save it.
7. When you have finished selecting the information, click **NEXT** to continue. You will be taken to tab “**2a) Initialize Fleet Team Workorder**”. Enter the vehicle’s mileage and the estimator and then

click **INITIALIZE**. This will initialize a workorder on the Fleet Team system, and you will be provided with a Fleet Team workorder number, as pictured below.

Fleet Team Estimate #104467 Cust/Pay Type: COMDATA Fleet Team Workorder #: 19723 (details)

1. Establish Fleet Team Company/Vehicle **2. Initialize Fleet Team Workorder** 3. Fleet Team Authorization

2a) Initialize Fleet Team Workorder 2b) Verify Initialization 2c) Add'l and Services Due

A Mileage and an Estimator is required.

The defaults are those already entered for this estimate, but if they are missing you must enter them now. You may also change those default values now.

Then press INITIALIZE.

Initialize, with this Mileage and Estimator

Mileage: 65145
Estimator: TIMOTHY MOYER
INITIALIZE

With Initialization, Fleet Team will officially begin its own workorder to match the VAST one, and will assign a Fleet Team Workorder ID.

Fleet Team Workorder#: 19723

<< PREV NEXT >>

You may EXIT at any time. When you next press the Fleet Team button you will return to this screen at the point where you left off. Exit

8. Then click **NEXT** to continue. You will be taken to tab “**2b) Verify Initialization**”, as shown below.

Fleet Team Estimate #104467 Cust/Pay Type: COMDATA Fleet Team Workorder #: 19723 (details)

1. Establish Fleet Team Company/Vehicle **2. Initialize Fleet Team Workorder** 3. Fleet Team Authorization

2a) Initialize Fleet Team Workorder **2b) Verify Initialization** 2c) Add'l and Services Due

Please double-check that company and vehicle are correct.

Press NEXT to see any Additional information required by Fleet Team, and to see any recommended Services Due.

Fleet Team Workorder#: 19723
Fleet Team Company: FT FleetID: 316495
Ecola Services
15314 Devonshire Street
Mission Hills CA 91345
PHONE 1: PHONE 2: FAX:
EMAIL:
WEB SITE:

Started in Fleet Team:
10/30/2007
11:01:32

Fleet Team Vehicle: FT VehicleID: 82816
VIN: 1GBHG31K2SF128406
YMM: 1995 CHEVROLET G30
Engine: V8, 5.7L
Unit#: 30 License: 5w23989
Body: 3 DOOR VAN; CUTAWAY Color:
MILEAGE: 65145

Fleet Team Labor Rate:

Fleet Team National Account: FT National Account ID:

CANCEL INITIALIZATION

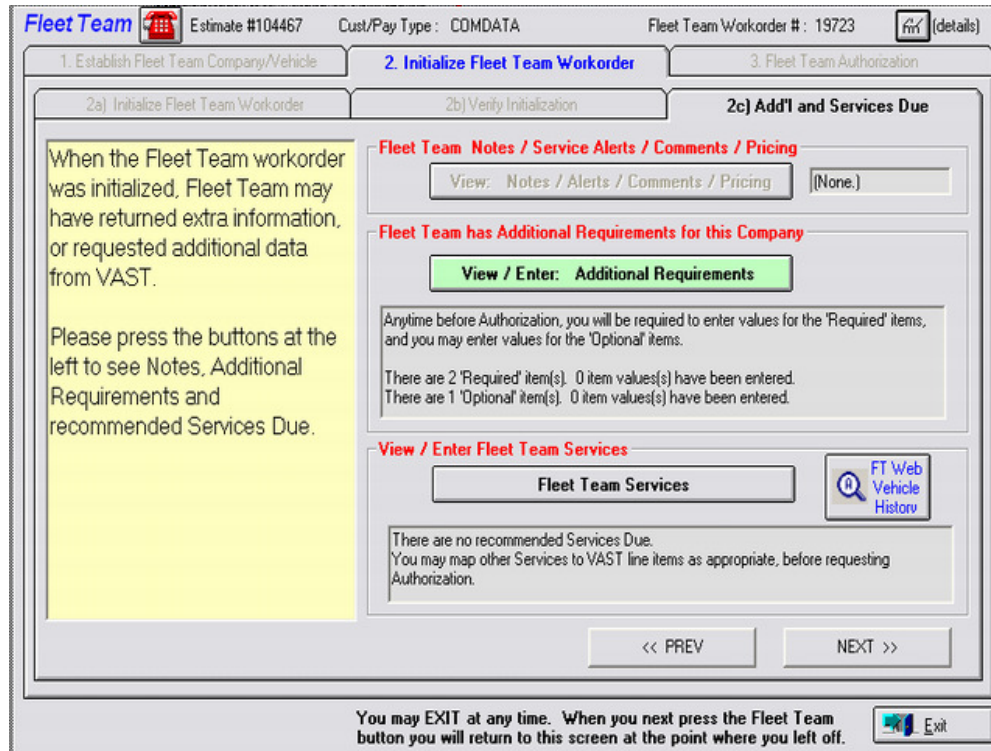
IF THIS DATA IS INCORRECT check the CANCEL box, then press PREV and backup through the steps until you get to the step that must be corrected.

<< PREV NEXT >>

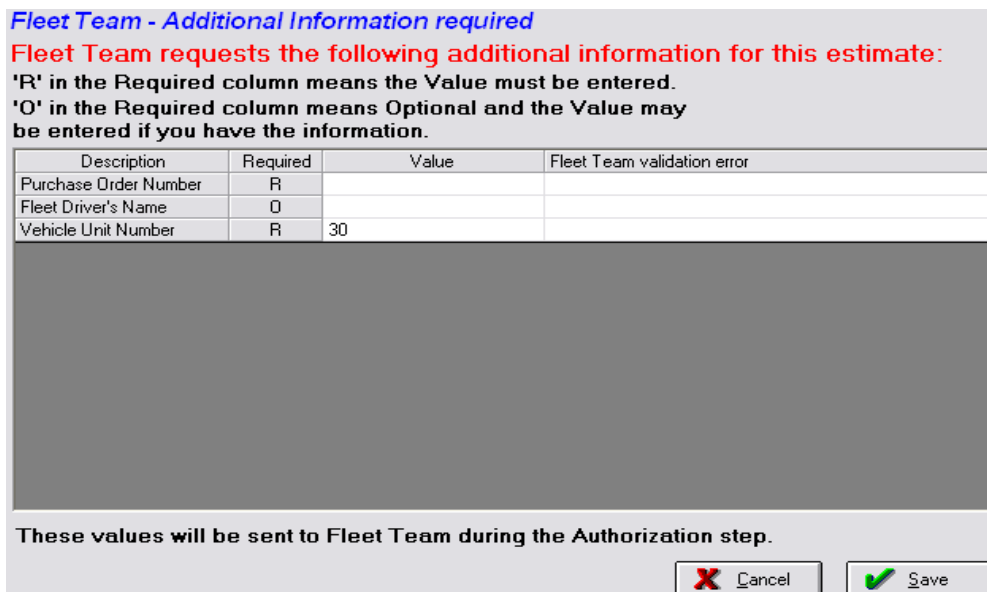
You may EXIT at any time. When you next press the Fleet Team button you will return to this screen at the point where you left off. Exit

9. Verify that all of the information on the screen is correct, and then click **NEXT**. If any of the information is **incorrect**, put a checkmark in the “**Cancel Initialization**” checkbox and then click the **PREV** button until you get to the screen that contains the information that needs to be corrected.

10. You will then be taken to tab “2c) Add'l and Services Due”, as shown below.



11. If there is any extra information returned by Fleet Team, the “View:Notes/Alerts/Comments/Pricing” button will be enabled. You can click on this button to view the additional information.
12. If there are additional requirements, the “View/Enter: Additional Requirements” button will be enabled, as shown in the picture above.
13. Clicking on this button will bring up the requirements window, as shown below.



14. If the information is required, you will see the letter “R” in the “Required” column. Information designated with an “O” in the “Required” column is optional. If you have the information, you can enter it now and click **SAVE**, or click **CANCEL** to return to the previous screen. You can return to this screen at a later time if needed.

- If you would like to view the recommended Fleet Team Services, you can click on the “**Fleet Team Services**” button, which will bring up the following screen:

Fleet Team Recommended Services Due

Fleet Team asks that you map each recommended Service to a VAST line item. You may also map any non-recommended Service that you perform.
 *** Mapping should be done before requesting Fleet Team Authorization. ***
 For any recommended Service that you will not be performing please enter a reason/notation into the VAST Service Comments. Service Comments are sent to Fleet Team with Authorization at Invoice Out.

Press **PRE-MAPS** button to view Package-to-Service mapping done earlier in Maintenance: **PRE-MAPS**

SERVICES. Recommended Fleet Team services are marked with "R":

Category	FT Item ID	FT Service	PkgPrice	TimeIntvl	MileIntvl	Mapped to VAST
A/C Services/Fe	170851	Recharge A/C	\$192.00			
Brakes	170849	Brake Pads	\$60.00			
Brakes	174491	Brake Rotor	\$211.67			
Electrical	170852	Computer Replacement	\$600.00			
Engine	170850	Oil Change	\$88.43			

VAST LINE ITEMS. Map to Fleet Team Services: Double click FT Item ID field for dropdown, or Press **MAP** to apply pre-mapped Services: **MAP**

MFG	VAST Part #	VAST Part Description	VAST Price	FT Item ID	FT Price	FT Service

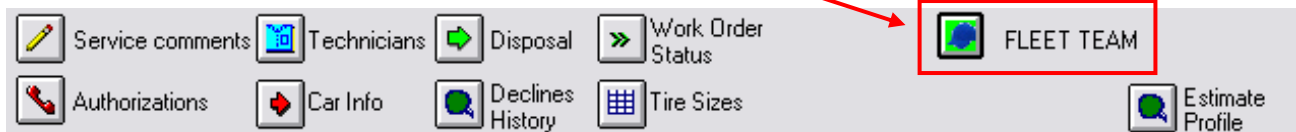
Only map the VAST Package, do not map parts/labor within the Package. Do not map to Discount row.

Print Cancel Save

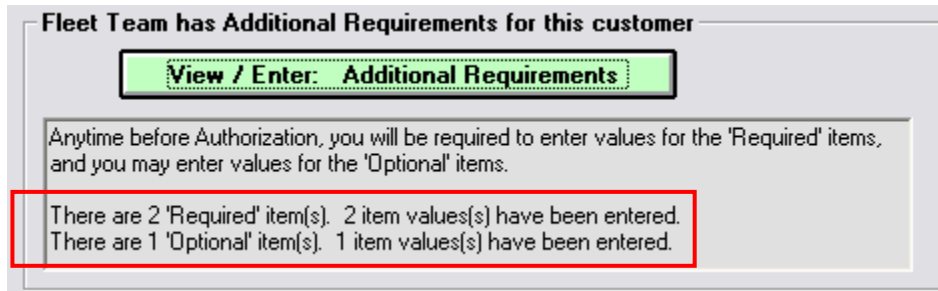
- Any recommended services will appear with the letter “**R**” next to them in the first column on the left. To close this screen, click **CANCEL**.
- Then click **NEXT** to go to tab “**3. Fleet Team Authorization**”. At this point you will want to exit the screen by clicking the **EXIT** button, which will take you to the lineitems screen.
- Enter the parts & labor onto the workorder, as well as any service comments, etc.

****NOTE:** Any service comments entered for this estimate will be sent to Fleet Team for the Fleet Team Workorder, and will be visible to anyone viewing Vehicle History for this car. It may be useful to enter notes for certain instances, for example: the reason why a service recommended by Fleet Team was not performed.

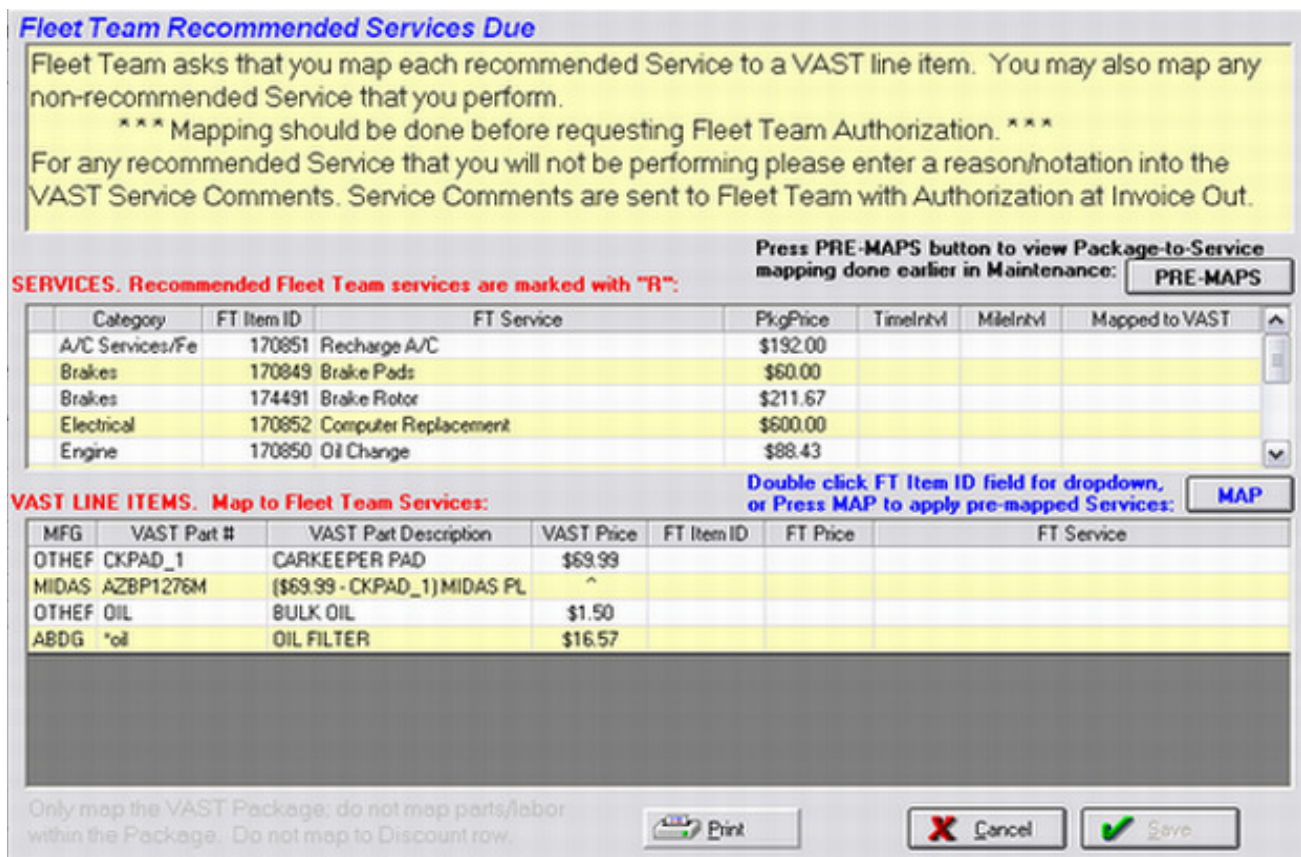
- Before invoicing out the workorder, you will need to get a final authorization from Fleet Team for the estimate. Click on the “**Fleet Team**” button from the lineitems screen, as shown below, to return to the Fleet Team data validation screen.



- You will be returned to the Fleet Team module and will be taken to the next logical step in the process, based on where you left off the last time you exited the module. In this case, we are taken to tab “**3. Fleet Team Authorization**”.
- You must enter any additional requirements if you have not already done so. You will see the status of the additional requirements in the following section of the screen.

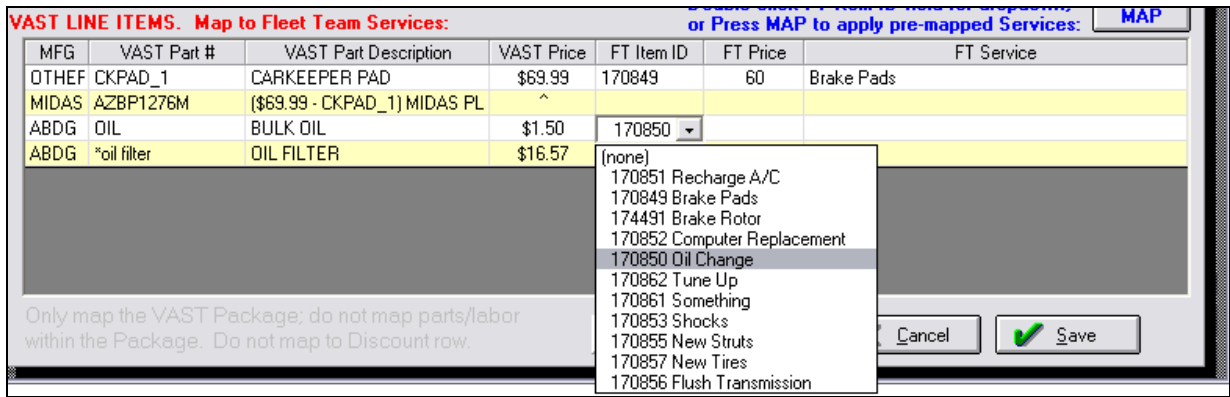


- 22. If there are any required items that have not been entered, you will need to click on the “View/Enter: Additional Requirements” button, and then enter and save the values.
- 23. Next, you will want to map your lineitems to the Fleet Team services. To do this, click on the “Fleet Team Services” button. You will be taken to the screen shown below.

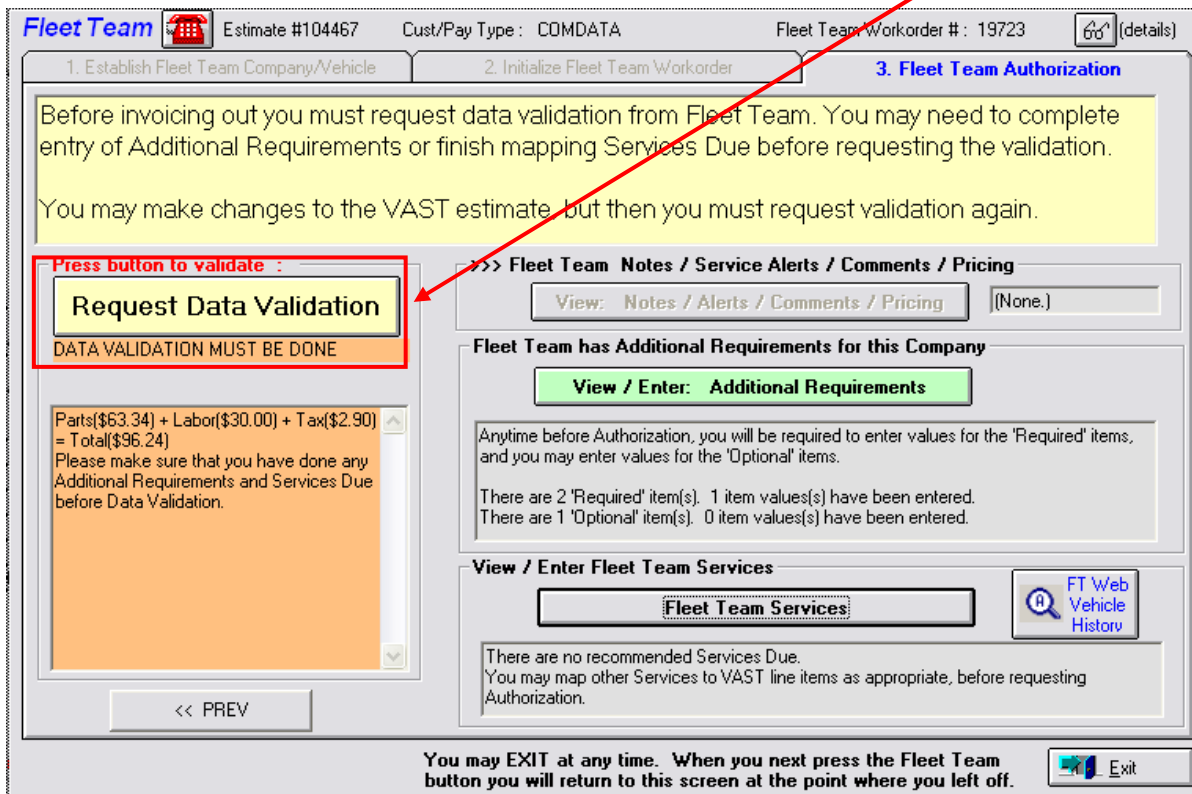


- 24. First, click the **MAP** button to have VAST automatically enter any Fleet Team Services that you may have pre-mapped in the Packages screen in Maintenance.
- 25. Then if there are any remaining services that are not mapped, you can click inside the “FT Item ID” field in the bottom grid and make a selection from the drop-down menu that appears, as shown below. When you are finished mapping each of the parts, click **SAVE**.

****NOTE:** Mapping your services to Fleet Team allows Fleet Team to keep an accurate service history of each vehicle. If you do not map your services on this screen, **OR** if you did not perform any of the services that were recommended by Fleet Team, you should enter service comments into VAST so that a record is sent to Fleet Team.



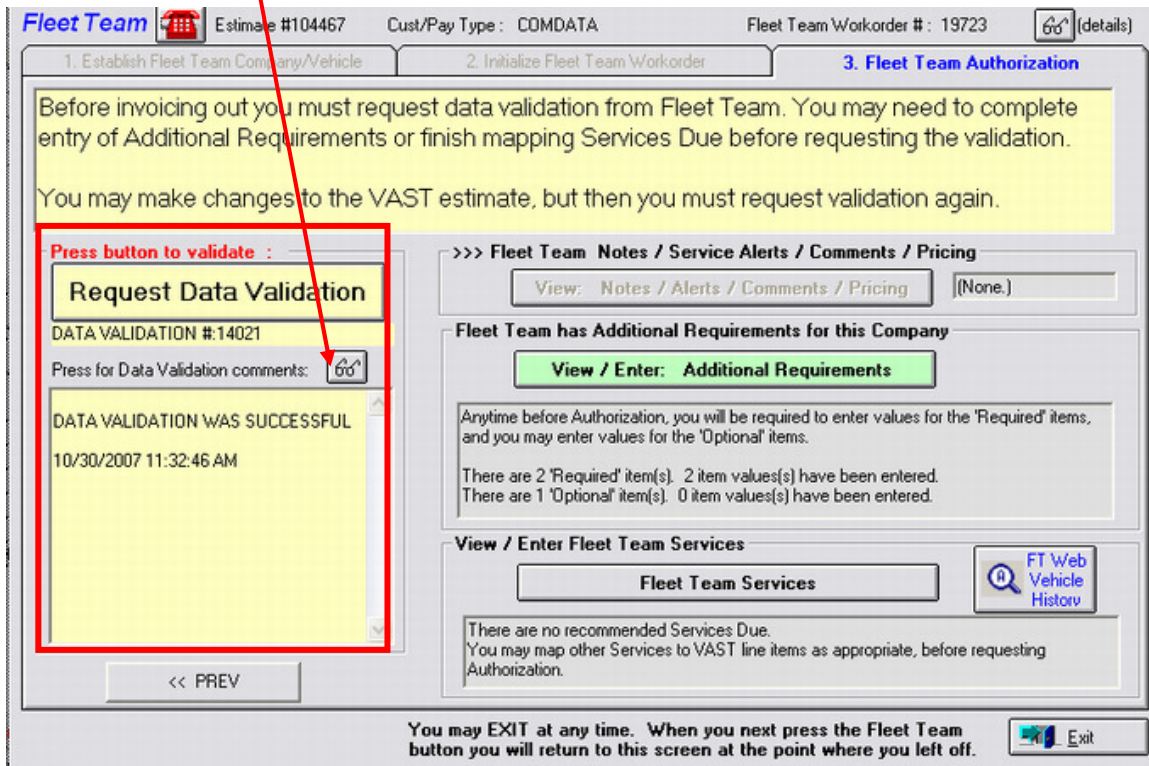
26. You will be returned to the Fleet Team authorization screen. When the workorder is ready to be invoiced out, and you have entered all of the additional requirements and mapped the Fleet Team Services, click the “REQUEST DATA VALIDATION” button, as shown below.



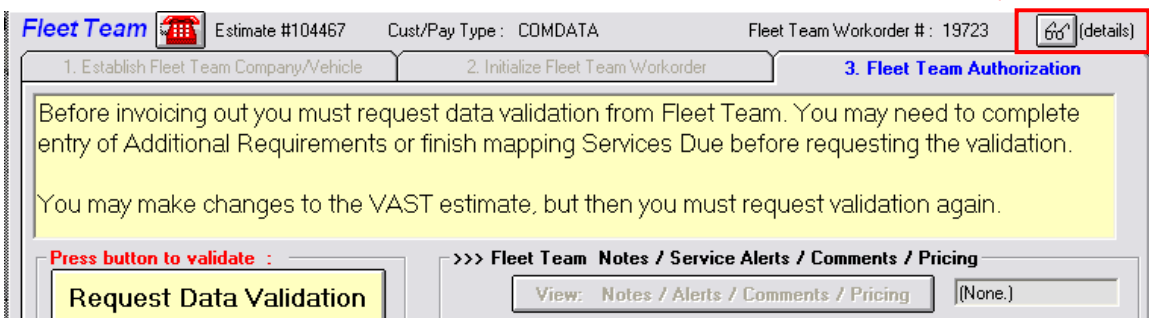
27. If the authorization is successful, you should see a message box appear, similar to the one shown below. Click **OK**.



28. The screen has now changed, and you are provided with a data validation number. If you would like to view any comments that were sent down from Fleet Team, you can click on the “**Press for Data Validation Comments**” button, as shown below.



29. You also have the option of viewing the details of the transaction at any time, by clicking on the “(Details)” button in the top right corner of the screen, as pictured below.



30. When you are finished, click **EXIT** to close this screen and return to the lineitems screen. You can now continue to invoice out the ticket in the usual fashion.

31. When you reach the payment screen, you will need to select the payment type that you entered originally for the fleet team data authorization. You will also notice that there is a Fleet Team button on this screen, as well as the “**Will this be a Fleet Team invoice?**” checkbox, as shown below.

Payment Type	Amount Remitted	Equivalent Value	Authorization	Date
NATL FLEET TEAM	95.64	95.64		
	0.00	0.00		

Parts	\$51.34
Labor	\$42.00
Adjust	\$0.00
	\$93.34
Tax	\$2.30
Total	\$95.64
Change	\$0.00

FLEET TEAM Total \$95.64 Remaining \$0.00

Will this be a Fleet Team invoice?

Terms for House Account Payment

None
 AR Term:
 Installments:

Mailing Est. Profile Parts Comments Print Cancel

32. You will need to verify that the “**Will this be a Fleet Team invoice?**” checkbox has a checkmark in it.
33. If you wish, you can click on the Fleet Team button to return to the Fleet Team screens to view or change information. Also, **if you have made any changes** to the workorder since you last requested a validation, you **MUST click on the FLEET TEAM button and request data validation again.**
34. When you are finished, click **PRINT** to invoice out the workorder.
35. If you made changes to the workorder and did not re-obtain authorization before trying to invoice, you will see the following message box appear. Please **read the choices carefully**, and then make a selection.

Fleet Team - Pre-Authorization

Fleet Team pre-Authorization is required.

Either you have not done pre-Authorization, or pre-Authorization failed, or something of concern to Fleet Team has changed since a prior pre-Authorization.

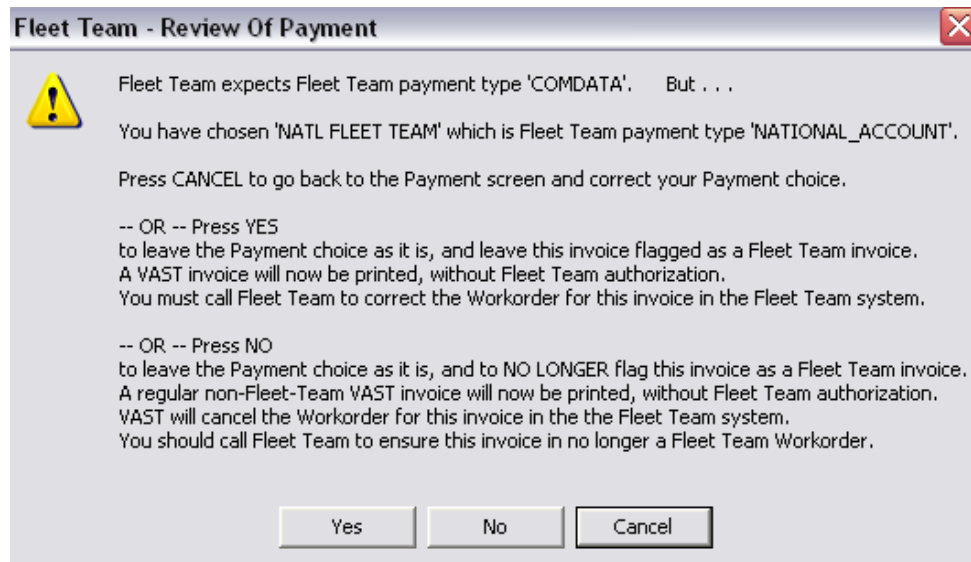
Press CANCEL to go back to the Payment screen.
Once there, press the Fleet Team button and request pre-Authorization.

-- OR -- Press YES
to leave this invoice flagged as a Fleet Team invoice.
A VAST invoice will now be printed, without Fleet Team authorization.
You must call Fleet Team to build/update the Workorder for this invoice in the Fleet Team system.

-- OR -- Press NO
to NO LONGER flag this invoice as a Fleet Team invoice.
A regular non-Fleet-Team VAST invoice will now be printed.
The invoice will not be in the the Fleet Team system.

Yes No Cancel

36. If you select a payment type that is different from the one you originally selected on the Fleet Team validation screen, the following message box will appear. Please read the details and make a selection.



37. Otherwise, the invoice will be printed and finalized in the usual fashion. You will be returned to the VAST Point of Sale main menu where you can continue using VAST.

VIEWING CUSTOMER HISTORY

1. To view the Fleet Team information on history invoices, click on the “**Customer Service History**” option from the VAST Main menu.
2. Enter the search criteria to bring up the invoice you want to view.
3. Then click the “**Fleet Team**” button, as shown below.

Customer History

Name: Invoice Date: Invoice #:

Invoice selection for 1986 HONDA PRELUDE

Last name	Date	Invoice	Mileage	Amount	Tax	Total	Services	Dec
ECOLA SERVICES	10/30/07	71769	65145	98.64	2.55	101.19	BR MI SS TI	<input type="checkbox"/>

Buttons: Service Comments, Fleet Details, **FLEET TEAM**, Authorizations, Estimate Profile, Print Customer, DOT Nbrs, Outside Purchases, Invoice Comments, Customer Profile, Print Car

Part #	Description	Rfr	Qty	Parts	Labor	Total	Tech	Wrrnty #	Dec	Srv
CKPAD_1	CARKEEPER PAD	0	1	\$0.00	\$0.00	\$0.00	000982			<input type="checkbox"/>
AZBP1276M	MIDAS PLUS PAD	0	1	\$39.99	\$30.00	\$69.99	000982	Z414190101:		<input type="checkbox"/>
OIL	BULK OIL	0	1	\$1.50	\$0.00	\$1.50	000982	Z414190101:		<input type="checkbox"/>
*oil filter	OIL FILTER		1	\$4.57	\$12.00	\$16.57	000982			<input type="checkbox"/>
*my part	OIL CAP		1	\$5.00	\$0.00	\$5.00	000982			<input type="checkbox"/>
FEE	ShopSupplies	0	1	\$5.58	\$0.00	\$5.58	000982			<input type="checkbox"/>

Buttons: Email/Fax, Print, Done

4. The **FLEET TEAM DETAILS** screen will appear, as shown below, where you can view the Fleet Team information that was entered for this invoice.

Fleet Team (view only)

Estimate #: 104467 Fleet Team Workorder #: 19723

Fleet Team National Account: FTNationalAccountID:

Selected Fleet Team Payment Type:

Data Validation:

Final Authorization:

Fleet Team Company: FTFleetID: 316495

VAST Customer:

Fleet Team Vehicle: FTVehicleID: 82816

VAST Vehicle:

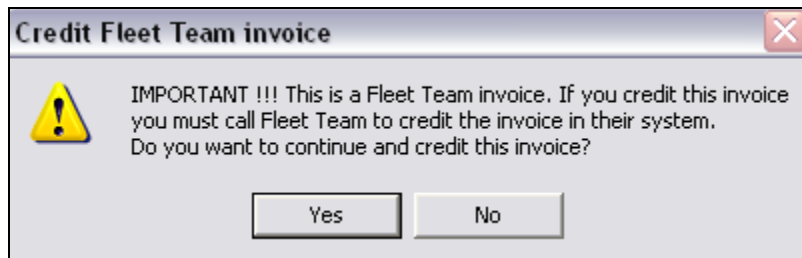
Buttons: View: Notes / Alerts / Comments / Pricing, View: Additional Requirements, View: Services Due

Status:

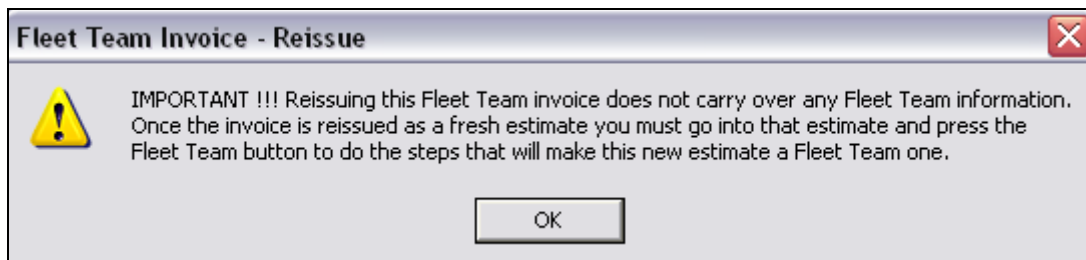
CREDIT/REISSUE OF A FLEET TEAM INVOICE

At this time, Fleet Team does not allow crediting of an invoice (called a Reverse Transaction) unless it is done within a certain limited time frame. Any credit and/or reissuing of a Fleet Team transaction must be handled manually by contacting Fleet Team. To credit/reissue a Fleet Team invoice, please follow the steps below.

1. Click on the “**Credit/Reissue Invoice**” option from the VAST Main menu.
2. Enter the search criteria to bring up the invoice you want to view.
3. Click **CREDIT**. If you have selected a Fleet Team invoice, you will see the following message box appear:



4. At this point you **MUST** call Fleet Team to have them credit the invoice. If Fleet Team approves the credit, you can then click **YES** on the message box and continue with the normal steps to finalize the credit. Otherwise, you must click **NO** and you will not be able to credit the invoice.
5. If you have credited the invoice and you need to reissue it, click **YES** on the message box that asks if you want to reissue. You will see the following message appear:



6. This message box advises you that **NONE** of the Fleet Team information will be carried over to the new estimate. You will need to follow the same steps as you would if you were creating a new estimate from scratch. Please see the section entitled ‘*Creating a Fleet Team Invoice*’ on page 11 for instructions on how to do this.