

# Manual Sale Transaction – Tips!

*Credit Card Handbook Section F*

- Are you using the proper form for the sale-type?
  - Sale? Extended Term? Credit?
- Set the correct date and sale amount on imprinter.
- Invoice/Memo goes on TOP of the credit card.
- Make sure all info imprinted clearly on all copies
- Use product codes to describe products sold
- Is it a fleet card? Get driver and vehicle info.
- Keep the work order with the invoice for:
  - Repair services
  - 6-month installment plan (Premier Card users)
- Marathon Premier Card users – only use 6-month installment plan for sales over \$50 and not buying fuel and C-store items.
- For Credit transactions – record the following:
  - Reason for credit issued
  - Total credit amount
  - Date of Sale
  - Original document number
- DO NOT include credit memos in the assignment transmittal total!

- Send Manual Assignment Transmittals AT LEAST twice weekly!
  - Keep dealer copy until payment/credit is received
  - DO NOT use staple, paperclip, or rubberband
  - Mail invoice process copies and transmittal process copy using specified envelope (Form #83-141-010).