

TANKS DATA

STANDARD OF PROCEDURES

MARKETING

- **Creating LEADS**

1. Go to IDEM VFC :
https://ecm.idem.in.gov/cs/idcplg?IdcService=GET_DOC_PAGE&Action=GetTemplatePage&Page=HOME_PAGE
2. Under *Simple Search* put the dates between which you want to search the documents that were uploaded by the IDEM on VFC. e.g. *From: 11/01/2023 To: 11/05/2023*. Then select the *Program: UST* and hit Search. This will open the page with the documents that have been uploaded between the selected dates.
3. Each page will have multiple documents. Open each document and *look for the names, emails, company names of Indian origin*.
4. Each document will have a *FID (Facility ID)* - Write down the FIDs that depict the Indian origin names.
5. *Login* into the *TANKS DATA software*. Click on the *search* icon on top. One by one check for the existing Leads, Gas stations & the FIDs that will not pop-up in the search shall be created in the software.
6. The documents found on the VFC for the *FIDs which are already existing as Gas stations, should be updated to the Operations Team*.
7. The new FIDs for which the Leads are already existing, should be created under the very lead. There is an option in the *Add Lead* where the existing lead can be selected and upon selecting a particular lead its information will be auto-filled, although you will have to *change the FID, Address, and Latitude & Longitude*. **Do not make any mistake while putting any detail. Download the document & rename as per the standard given.**

8. The Leads which are not in the software, must be created. ***Go to Add Lead. Put the FID. Then open the document found on VFC and copy the gas-station address. Paste the gas-station address on Google and in the result, the address with the Zip Code will appear. Copy that address in the field for address in the software while creating the lead. All the details such as telephone number, email address, and the person's name can be found in the Notification Form submitted earlier for a particular FID. Download the document & rename as per the standard given.***
9. Go to www.latlong.net to find the Latitude & Longitude of that gas-station. Copy & paste it in the respective fields.
10. Add the Lead. Go to the Marketing tab, click on Marketing Records and the option *New Email* can be found. Click on New Email. Put the email of the lead, select the respective cc & bcc. Put the subject as either ***“Records Request! FID *****-Gas-station Address”***. Select the respective template for the marketing. Attach the respective document for the FID for which you are drafting/sending the marketing email.
11. After sending the email. Call the Lead.
12. When the lead agrees for the service. Convert the Lead to Client.

- ***When an existing client refers the other client***

1. You will receive a call or an email.
2. Follow up with the client.
3. Ask for their address. Instantly search the address on the VFC. Take out the FID & check for the recent update from IDEM.
4. Explain the scenario to the new client and give them an overview of the services that TANKS DATA provides.
5. Tell them, they will be receiving a call from the operations team shortly.

How to save the concerning documents on any gas station:

- Records Request - **FID xxxx-RR-mm.dd.yyyy**
- Inspection - **FID xxxx-Inspection-mm.dd.yyyy**
- Violation Letter - **FID xxxx-VL-mm.dd.yyyy**

- Notification Form - **FID xxxx-NF-mm.dd.yyyy**
- Notification Acknowledgement - **FID xxxx-NA-mm.dd.yyyy**
- Financial Responsibility - **FID xxxx-FR-mm.dd.yyyy**
- Return To Compliance - **FID xxxx-RTC-mm.dd.yyyy**

OPERATIONS

- ***When the marketing team hands over a new client***

1. Create the client either by Converting the existing lead or in the other case go to the Add Client option and create the UST Client. Check for his phone number, email & address.
2. Call the newly added Client - Ask him about his company names, operator certificates ABC, financial responsibility, any test reports available, and name of their preferred testing & maintenance vendors. In the end ask them if they have any other gas-station which they would like to start the service for.
3. Create the UST owner, UST operator, Property owner & Contact at UST Facility profiles in the software. The information about the companies can be found on INBIZ - <https://bsd.sos.in.gov/publicbusinesssearch>
4. Copy the details into the fields required such as - Business Name, Business ID, Principal Office Address, Creation Date, and the Title & Name of the person governing the company.
5. After creating all the profiles in the software, Create the gas station by clicking on the Add Gas Station option. Fill up the required fields. Assign the CA, Client, concerning Companies, Testing Vendor, Maintenance Vendor. Fill-in the correct address by copying from Google and the latitude & longitude from www.latlong.net
6. Click on Save and the gas station will be created
7. Now click on the Email icon on the FID, and send three emails to the client - (a) Welcome! To TANKS DATA (b) Operator Certification (c) Financial Responsibility.
8. In case there are no test reports with the client, then, schedule tests with a testing vendor. Send an email to the Testing Vendor & attach the Records Request or Violation Letter that has been issued on that particular FID.

9. Follow up with the testing vendor after 3 days, as to when they have scheduled test for your gas station.
10. Upon receiving the reports from the testing vendor, incase any test fails, then the maintenance has to be done and passed report has to be obtained.
11. So, brief the client about the issue and draft/send an email to the maintenance vendor for the quote. Attach the failed report(s) & a copy of the violation letter to the email.
12. Follow Up with the maintenance vendor after 3 days. Follow up with the client & if the client agrees then give a go ahead for starting of the maintenance works.
13. Send an email to IDEM (UST Tank Fee) department and ask for the due invoice(s). Get them paid.
14. Get the requirements fulfilled mentioned by the IDEM on Records Request(Correspondence) and Violation Letter(Enforcement).
15. Once each & every request has been fulfilled, request for the RTC (Return To Compliance).
16. After receiving the RTC on a gas-station, there will not be any Records Request for the next three years.
17. In the next three years, you have keep scheduling the Annual Test (ATG/LLD/SF). Regularly conduct the monthly walkthroughs & check for the release detection reports. Regularly pay the tank fees from IDEM every year.

Documents that have to be maintained on a gas station at all times & how to rename them:

1. Financial Responsibility (FR) - **FID xxxx-FR-mm.dd.yyyy**
2. Operator A (3yrs) - **FID xxxx-Operator A-mm.dd.yyyy**
3. Operator B (3yrs) - **FID xxxx-Operator B-mm.dd.yyyy**
4. Operator C (3yrs) - **FID xxxx-Operator C-mm.dd.yyyy**
5. Updated Notification Form - **FID xxxx-NF-mm.dd.yyyy**

6. Lease/Deed (if required) - **FID xxxx-Lease/Deed-mm.dd.yyyy**
7. Test Reports:
 - Release Detection Report (UST) - for tanks installed before September 2, 2009 - SCALD/CSLD - **FID xxxx-SCALD/CSLD-mm.dd.yyyy**
 - Release Detection Report (UST) - for tanks installed on or after September 2, 2009 - Sensor Status or Liquid Status - **FID xxxx-Sensor Status-mm.dd.yyyy**
 - Automatic Tank Gauge (1yr)- ATG/Probe Functionality Test (must include probes test) - **FID xxxx-ATG-mm.dd.yyyy**
 - Line & Leak Detector (1yr) - Leak Detector Test and Product Line Test - **FID xxxx-LLD (LDT + PLT)-mm.dd.yyyy**
 - Sensor Functionality Test (1yr) - Liquid Sensor Functionality (LSF)/Sump Sensor Functionality (SSF)/Interstitial Sensor Functionality (ISF) - **FID xxxx-LSF/SSF/ISF-mm.dd.yyyy**
 - Hydrostatic Spill Bucket Test (3yrs) - **FID xxxx-HSB-mm.dd.yyyy**
 - Overfill Prevention Test (3yrs) - **FID xxxx-OPV-mm.dd.yyyy**
 - Hydrostatic Sump Containment Test (3yrs) - **FID xxxx-HSC-mm.dd.yyyy**
 - Cathodic Protection Test (3yrs) - These are of two types either Galvanic or Impressed Current - FID xxxx-CP (Galvanic)-mm.dd.yyyy - In case of Impressed current, 60 days rectifier logs are to be maintained - **FID xxxx-60 Days Rectifier Log-mm.dd.yyyy**
 - Tank Tightness Test - It is mandatory if Release Detection pass reports are not maintained for consecutive 12 months - **FID xxxx-TTT-mm.dd.yyyy**

EMAILS

- **How to respond to emails and the use of templates**
1. Welcome Email to Client - Subject - **Welcome! To Tanks Data** || Template - *Welcome Tanks Data* || To: *Client*

2. Operator Certification - Subject - **Operator Certification Link** || Template - *Operator Certification* || To: *Client*
3. Financial Responsibility - Subject - **Financial Responsibility** || Template - *CD/Bank Letter* || To: *Client*
4. Scheduling Test - Subject - **FID xxxx-Schedule Testing** || Template - *Testing Request* || To: *Testing Vendor (Midwest Tank Testing, Southern Midwest Tank Testing, Gasoline Equipment)*
5. Requesting Quote for maintenance - **FID xxxx-Quote Request** || *Quote Repair Maintenance* || To: *Maintenance Vendor (Owl Services, KW equipment, TWP Services, KW equipment, Chris Dunifon, AJ Petroleum)*
6. Scheduling Maintenance - **FID xxxx-Maintenance Required** || Template - *Repair Maintenance* || To: *Maintenance Vendor (Owl Services, KW equipment, TWP Services, KW equipment, Chris Dunifon, AJ Petroleum)*
7. Follow Up - Forward the previous email || Type - Kindly update us about the status & add signature.
8. Tank Fees - Subject - **FID xxxx-Please Provide the Due Invoice(s)** || Template - *Tank Fees Invoice* || To: *IDEM (current - Browne Rita)*
9. Submitting Reports to IDEM - Subject - **UST Facility ID # xxxx - Address** || Template - *IDEM Reports* || To: USTcompliance@idem.gov.in
10. Submitting Notification Form to IDEM - Subject - **UST Facility ID # xxxx - Address** || Template - *NF Submission* || To: USTregistration@idem.gov.in
11. Requesting RTC from IDEM - Subject - **UST Facility ID # xxxx - Address** || Template - *RTC Request* || To: USTcompliance@idem.gov.in

(Note: All the emails should be customized as per the requirement and should be self-explanatory. All the emails are in the chronological manner.)

CALLING

INBOUND:

Introduction-: Hello, Good morning/afternoon.

Thank you for calling Tanks Data.

This is,

How may I help you?

.....

Closing-: Is there any thing else where I can assist you.....

Thank you again, will keep you informed.We value our partnership with you.

OUTGOING:

Introduction-: Hello, Good morning/afternoon.I hope you're doing well.

This is From Tanks Data, I am calling you regarding your gas station having address.....

We are missingdocuments.....

Closing-: Is there any thing else where I can assist you.....

Thank you again, will keep you informed.We value our partnership with you.

Financial Responsibility documents to cover \$15,000 IDEM deductible:

Pollution Liability Insurance

Surety Bond

Letter of Credit

Bank Loan Commitment letter

Promissory Note

Review points

Compliance Contact

Is site Clean (Proper naming of Companies, Contact at UST Facility,

Site status

before and after 2009

Site History

Requirement from IDEM with date
Communication with IDEM
Pending work
Last follow up with client-call
Last follow up with Maintenance Vendor-call
Last Follow-up with Testing Vendor-call
Weekly Follow up/Last Activity
All documents uploaded with proper naming etc
MWTs updated and uploaded
Tank Fee
Total Task
Task Completed
How Many Alerts/monitored
How many RTCs requested
RTC received
Email forwarded
Emails from Sites
Check site/lead on map

TR(Tank regular),
TP(Tank Premium),
TD(Tank Diesel),
TK(Tank Kerosene)
MWT(Monthly walk through)