



Fleet Advantage

TOYOTA FLEET ADVANTAGE

Policies & Procedures



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Introduction

The purpose of this *Policies & Procedures* manual is to establish guidelines for the successful operation of the *Toyota Fleet Advantage Program*. Included are policies, procedures and responsibilities related to the courtesy delivery of fleet vehicles to commercial and government accounts.

Performing a courtesy delivery is your opportunity to showcase your dealership, including:

- The professionalism and customer handling skills of your staff
- Your maintenance and repair services
- Available parts and accessories sales

By providing a high-quality delivery experience, you establish a relationship with a new customer who is more likely to return to your dealership the next time they are in the market for a new retail vehicle.

Note: Revisions to these policies and procedures may occur as deemed necessary by, and at the sole discretion of, the Toyota Motor North America Fleet Department.

Section 1:

Program Overview



1.1 Program Goal

The *Toyota Fleet Advantage Program* aims to support the *Toyota Fleet Commercial Program* by providing a high-quality courtesy delivery and a dealership experience to commercial and government fleet drivers.

While the program is designed to foster brand loyalty and grow fleet sales, DELIVERING DEALERS also have the opportunity to increase retail referrals and out-of-stock purchases, fee revenues (see **2.2.6 Delivery, Licensing, Titling and Storage Fees**, below), among other benefits (e.g., service and maintenance revenue, accessory and parts sales, body shop repairs, access to returned vehicles and connected services).

1.2 Program Scope

FLEET ACCOUNTS can request courtesy delivery of their Toyota vehicles from any Toyota dealership in the United States (excluding Hawaii) enrolled in the *Fleet Enrollment Program*. (See section 2.1.1 **Fleet Dealer Enrollment** for complete details.) These DELIVERING DEALERS are responsible for:

- Appointing a dealership contact to coordinate courtesy deliveries
- Performing a high-quality courtesy delivery experience
- Negotiating per-vehicle delivery fees
- Promoting additional dealership services

The scope of this program includes the **courtesy delivery** of all eligible Toyota models to FLEET ACCOUNTS, specifically:

- **Commercial (H1)** – Individual commercial companies with 10 or more units in service or a company that will achieve a fleet of 10 or more units after a purchase of Toyota vehicles is completed
- **Government (H7)** – Utility, government and non-profit entities with one or more units in service

(Refer to the Toyota Fleet Policies & Procedures for Commercial Programs section for specific Toyota model and FLEET ACCOUNT eligibility requirements.)

1.3 Roles & Responsibilities

For a complete and detailed list of the Roles & Responsibilities of each participant involved in the *Toyota Fleet Commercial Program*, refer to the *Toyota Fleet Policies & Procedures for Commercial Programs*, which you can find as a resource on the Toyota Fleet website (fleet.TOYOTA.com).

1.3.1 TMS and TMNA

Toyota Motor Sales, U.S.A., Inc. (TMS) is the distributor of all Toyota vehicles in the United States (excluding Hawaii). TMS provides vehicles to all Toyota Dealers and Private Distributors (PDs). Toyota Motor North America, Inc. (TMNA) is TMS's parent company.

TMS's role in the *Toyota Fleet Advantage Program* is to support and facilitate the sale of Toyota fleet vehicles to commercial and government accounts, and to foster strong relationships between Dealers and customers.

1.3.2 Distributor

TMS, Southeast Toyota (SET) and Gulf State Toyota (GST) are authorized distributors that service the franchised Dealers in their designated areas. SET and GST are referred to as PRIVATE DISTRIBUTORS (PDs) throughout this document.

The DISTRIBUTOR's role in the *Toyota Fleet Advantage Program* is to facilitate and manage the sale and delivery of Toyota vehicles to commercial and government accounts, ensuring compliance with TMS policies and program criteria.

1.3.3 Selling Dealer

The SELLING DEALER's role in the *Toyota Fleet Advantage Program* is to work closely with the FMC to assist in all aspects of the purchasing transaction, including financing and ordering fleet vehicles and arranging delivery with a DELIVERING DEALER.

1.3.4 Delivering Dealer

The DELIVERING DEALER's role in the *Toyota Fleet Advantage Program* is to coordinate and perform the same industry-leading courtesy delivery experience for fleet vehicle DRIVERS that our retail customers have come to expect.

When planning your delivery presentation, be sure to consider the DRIVER'S time constraints and, if necessary, offer multiple options for the delivery

presentation, like identifying which items are most important to the DRIVER and prioritizing features that some find difficult to use or understand.



Delivery Checklists are available at Toyota Engage. Download and make use of the one specific to the series of vehicle being picked up:

1. Log on to engage.TOYOTA.com using your SPIN ID and password
2. Select the drop-down menu from the upper left-hand corner
3. Select "More" then "Delivery Checklists"

This topic is covered more thoroughly in the Certification eModule TDLR-9: **Delivery Best Practices**, available on ToyotaCertification.com.

The specific policies and procedures that support the DELIVERING DEALER'S roles and responsibilities are covered in **Section 2: Toyota Fleet Advantage Procedures** of this document.

1.3.5 Fleet Management/Commercial Leasing Company (FMC)

The role of the FLEET MANAGEMENT/COMMERCIAL LEASING COMPANY (FMC) in the Toyota Fleet Advantage Program is to act as the liaison between the FLEET ACCOUNT and the SELLING/DELIVERING DEALERS.

1.3.6 Fleet Accounts

There are many different types of fleet accounts, including:

- Government Entities
- Corporate RAC/Licensees/Independent Accounts
- Special Authorized Toyota Commercial Customers/Self-Managed Customers

The role of the FLEET ACCOUNT in the Toyota Fleet Advantage Program is to arrange the transaction, submit orders and take delivery of fleet vehicles.

Section 2:

Toyota Fleet Advantage Procedures



2.1 Administration

2.1.1 Fleet Dealer Enrollment

To participate in *the Toyota Fleet Program*, each SELLING and DELIVERING DEALER must:

1. Complete the *Fleet Dealer Enrollment Process* available via FTC (fleet.TOYOTA.com)
2. Comply with all policies, procedures and guidelines for each applicable fleet program in effect
3. Select their preferred FMCs
4. Designate a *Toyota Fleet Advantage* professional and register the professional in the *TMNA Staff Master database*
5. Agree to participate in the *Toyota Fleet Advantage Program*
6. Agree to both selling and delivering commercial and government units

Once the Dealer has completed the *Fleet Dealer Enrollment Process*, Toyota must approve the enrollment before they can be designated a Toyota Fleet SELLING or DELIVERING DEALER.

2.1.2 FTC Registration

DELIVERING DEALERS can track the delivery of courtesy vehicles via FTC (fleet.TOYOTA.com).

- To register for online access:
 1. Log on to Dealer Daily
 2. Select VEHICLES
 3. Select FLEET
 4. Select USER REGISTRATION
 5. Complete and submit registration information

2.1.3 Insurance & Liability

TMS recommends that the DELIVERING DEALER insures against physical loss or damage to FMC fleet vehicles while in possession of the DELIVERING DEALER. The responsible party is the owner of the vehicle at the time the loss or damage occurs.



As a Dealer, you may want to consider additional coverage for fleet vehicles through your Garagekeepers liability policy. You should discuss this with your dealership's attorney and/or insurance provider. A selling Dealer working with a self-managed fleet customer may also want to consider discussing coverage with their provider.

2.2 Pre-Delivery

2.2.1 Delivery Notification

The SELLING DEALER or FMC notifies the DELIVERING DEALER when the vehicle is scheduled to arrive. This is required since the *Vehicle Information Delivery Packet* (described below) will generally arrive at the dealership after the vehicle.



TIP

This is the perfect time to ask the FMC if the DRIVER taking delivery of the new fleet vehicle will be turning in an existing unit.

The DELIVERING DEALER can access a list of incoming deliveries from two different systems:

- FTC (fleet.TOYOTA.com)
 1. Log on to fleet.TOYOTA.com
 2. Select "Ordering Center – Search Orders"
 3. Select the "THIS MONTH DELIVERIES" tab
 4. Click the drop-down for Shipping Dealer
 5. Search for and select your dealership
 6. Select "SEARCH" button

- Dealer Daily
 1. Log on to Dealer Daily
 2. Select the “Vehicles” tab
 3. Under the “Inquiries and Reports” section, select “Vehicle Reports”
 4. Select “Commercial Delivery Report – By Delivery Dealer”

Note: There are several reports to choose from and they are automated daily.

2.2.2 Vehicle Information Delivery Packet

The FLEET ACCOUNT, FMC or SELLING DEALER sends the DELIVERING DEALER a *Vehicle Information Delivery Packet*.

- The *Vehicle Information Delivery Packet* is provided by either the FLEET ACCOUNT, FMC or SELLING DEALER
- Regardless of who provides the *Vehicle Information Delivery Packet*, each must include:
 1. Dealer invoice/Bill of Sale (BOS), if applicable
 2. Certificate of Origin (COO)/Manufacturer’s Statement of Origin (MSO), if applicable
 3. Driver or FMC contact information
 4. Title and registration instructions
 5. Power of Attorney for title and registration of vehicle, if applicable
 6. Instructions for title and registration fees and courtesy delivery reimbursement
 7. Any special instructions

Note: These items are dependent on each state's laws/requirements.



TIP

Some sources provide an electronic *Vehicle Information Delivery Packet*, while others send a paper version by mail. Check with your sources beforehand to determine how you will receive the packet. If they are sending it by mail, request a tracking number so you know when it will arrive. If you have not received a *Vehicle Information Delivery Packet*, notify the sender to request a duplicate.

2.2.3 Receiving & Inspecting Vehicles

It is the responsibility of the DELIVERING DEALER to receive and inspect fleet vehicles on behalf of the SELLING DEALER when they arrive at the dealership in accordance with the transportation procedures specified in the *TLS Transportation Claims Policy & Procedure Manual*. This includes filing warranty and transportation claims if required. You can find the manual as a resource on the Toyota Fleet website (fleet.TOYOTA.com).

2.2.4 Pre-Delivery Service

In most cases, the DELIVERING DEALER is required to perform the Pre-Delivery Service (PDS) and install a full tank of fuel on commercial and government program vehicles. This is in accordance with TMNA prescribed procedures, as outlined in the *TMNA Warranty Policies & Procedures Manual*, which you can find on the *Claims Processing and Resource Center* (wrc.TOYOTA.com).

- In the following cases, the DELIVERING DEALER is *not responsible* for providing PDS:
 - Vehicles delivered to third-party drop-ship locations where PDS will be performed by Toyota Logistics Services (TLS)
 - SET and GST perform PDS prior to Dealer or third-party drop-ship delivery location

Please note: In general, commercial and government vehicles receive the same PDS and fuel as retail vehicles.

See table below for summary of responsibilities for PDS and full tank of gas.

	Pre-Delivery Service	Full Tank of Gas
TMNA Dealer: Fleet/Ship-Thru	Full by Dealer	Dealer
PD Dealers: Fleet/Ship-Thru	GST/SET PDS	Dealer
TMNA Dealer: Ship-To (Drop-Ship to non-Dealer location)	Partial by TLS*	N/A
PD: Ship-To (Drop-Ship to non-Dealer location)	GST/SET PDS	N/A

*For further detail on partial PDS, please reference the *Toyota Fleet Policies and Procedures-Commercial* on the Toyota Fleet website (fleet.TOYOTA.com).

2.2.5 Pick-Up Notification

The DELIVERING DEALER notifies the DRIVER or FMC contact that the vehicle has arrived and is ready for pick-up.

- FMCs are responsible for ensuring the DRIVER does not arrive at the dealership for pick-up before the vehicle is ready.
- FMCs will also disclose to the FLEET ACCOUNT any fees, including fees the DELIVERING DEALER is authorized to charge.

2.2.6 Delivery, Licensing, Titling and Storage Fees

DELIVERING DEALERS are permitted to charge a delivery fee not to exceed \$450 per delivery.

If applicable, the DELIVERING DEALER is responsible for completing vehicle registration and title documentation. In addition to being reimbursed for actual registration fees, DELIVERING DEALERS may also charge administration fees for licensing and titling fleet vehicles when working with the DMV. The amount of these fees is at the Dealer's discretion.



TIP

To help ensure quick payment, invoices for fees should be itemized. **See section 2.4.1 Fee Reimbursement** for details.

**TIP**

Requirements for vehicle registration and titling vary. Coordinate with your FMC and take time to understand the state and local requirements in your area.

The DELIVERING DEALER may charge a reasonable and customary storage fee for new and returned vehicles not picked up within 30 business days (Monday through Friday). The storage fee must be disclosed to the FLEET ACCOUNT/FMC.

- The DELIVERING DEALER is responsible for negotiating all delivery, licensing, titling and storage fees with the FLEET ACCOUNT or SELLING DEALER prior to the arrival of the vehicle to exercise the right to charge such fees.

2.3 Vehicle Delivery

2.3.1 Driver Pick-Up

The DELIVERING DEALER coordinates final pick-up date and time with the DRIVER.



TIP

Fleet DRIVERS should expect the same industry-leading delivery experience as retail customers. Follow the series-specific Vehicle Delivery Checklists available on Toyota Engage to ensure a thorough walkaround delivery tailored to the needs of each DRIVER.



MISSING AND REQUESTED ACCESSORIES

In the rare case a fleet vehicle shows up missing accessories or the driver might request additional ones (like all-weather floor mats), you should establish a way to handle these situations with each FMC ahead of time. That way you can let DRIVERS know their options when (or even before) they arrive to take delivery.

2.3.2 (Optional) Used Vehicle Turn-In

To the extent applicable, the FLEET ACCOUNT or FMC confirms turn-in arrangements with the DELIVERING DEALER.

The Commercial DRIVER turns in the previously used vehicle at the DELIVERING DEALERSHIP. The DELIVERING DEALERSHIP is responsible for storing the turn-in unit for up to 30 days (Monday through Friday).

- The vehicle must be stored in a secured spot on the dealership lot until it is picked up by an auction company or other authorized agent of the FMC (see **Section 2.4.2 Turn-In Vehicle Pick-Up** for details).

2.4 Post-Delivery

2.4.1 Fee Reimbursement

If applicable, the SELLING DEALER, FLEET ACCOUNT or FMC reimburses the DELIVERING DEALER for all delivery, registration, titling and storage fees.



TIP

To apply for reimbursement, contact the FMC (or in some cases the Selling Dealer or Fleet Account) for instruction.



DOCUMENTATION

For transparency and to facilitate audits, invoices for delivery, registration, titling and storage fees should be itemized, showing the amount of each included fee.

Description		Amount	STATEWIDE FLEET		Draft 246810
Delivery		\$450.00	1234 Main St.	VIN XXXXXXXXXXXXX	
PDS	Incl.		Capitol City, XX 12345	Fleet ID 3X1Z	
Storage		\$75.00			
DMV Svc.		\$65.00			
Total		\$590.00			\$ 590.00
			Pay to <i>Five hundred ninety & xx/100</i>		
			Anytown Toyota 750 Toyota Way Anytown, XX 12456		
			Dealer Signature <i>Grant Wilson</i>		
			Driver Signature <i>Jane Washington</i>		
SAMPLE ONLY 1234 456789					

When you provide a detailed invoice, payers will have fewer questions, and it's likely that the invoice will be paid more promptly.

2.4.2 Turn-In Vehicle Pick-Up

The FMC is required to pick up returned vehicles from the dealership within 30 business days (Monday through Friday).

- In the event the vehicle is not picked up within the 30-day window, the DELIVERING DEALER may charge a reasonable and customary storage fee (see above).
- If the DELIVERING DEALER is interested in purchasing a turn-in unit, they may negotiate the purchase with the FMC.