

# Toyota Fleet

Policies & Procedures

Toyota Executive Delivery Program

## Toyota Executive Delivery Policies and Procedures

### i. Program Type

The Toyota Executive Delivery program is for all Dealerships that are enrolled in the Fleet Enrollment Program.

### ii. Participants' Roles & Responsibilities

1. **Toyota Motor North America, U.S.A., Inc. ("TMNA")** is the importer of all Toyota vehicles in the United States, except Hawaii. TMNA provides vehicles to all TMNA dealers and Private Distributors (PD's).

#### TMNA:

- Establishes:
  - The policies and procedures
  - The secondary dealer code if requested by TMNA selling dealer
- Publishes:
  - Fleet incentives for vehicles meeting program criteria
  - The price protection and price assurance policy
- Provides:
  - National Fleet Advertising
  - Vehicle specification information for ordering purposes
  - Access to fleet website [fleet.toyota.com](http://fleet.toyota.com)
  - Status information of order through [fleet.toyota.com](http://fleet.toyota.com)
  - Customer support group to assist customers in ordering and status information
  - Bid assistance analysis for governmental agencies and/or public or private utility companies upon request by selling dealer
  - Training materials on new products
- Maintains the Fleet ordering systems
- Approves and issues the Toyota Fleet Identification number (FID) and Customer Identification number (CID) for all Fleet Accounts
- Negotiates with manufacturing plants to meet requested production volumes and delivery timelines
- Creates and processes the dealer invoice and Manufacturer's Statement of Origin (MSO) for sales generated by TMNA dealers
- Audits policy compliance and implements chargebacks for fleet incentives for vehicles not meeting program criteria

2. **Distributor** – TMNA, Southeast Toyota (SET) and Gulf States Toyota (GST) are authorized distributors that service the franchised dealers in their designated areas. SET and GST are referred to as Private Distributors (PD) throughout this document.

#### The Distributor:

- Employs Fleet Field Managers/ PD managers to provide the face to face program explanation, Toyota policies and procedures and to solicit new business with dealers, licensees, commercial customers and commercial leasing companies
- Assists the Fleet Account in applying for Toyota Fleet Identification number or Customer Identification number
- Creates and processes the dealer invoice and MSO for sales generated by PD dealers
- Applies the incentive credits to dealer invoice for vehicles meeting program criteria
- Contracts with the carrier to deliver vehicles to dealership
- Installs the post production/ port installed options
- Responsible for coordinating with the selling dealer to identify the responsible parties for facilitating training

- Provides VIN status information to selling dealers through Dealer Daily network
- SET and GST provide Pre-Delivery Service (PDS)
- Coordinates with TMNA to establish the secondary dealer code if requested by PD selling dealer

### 3. Selling Dealer

To participate in the **Toyota Fleet** programs, each dealer must:

- i. Complete the [Fleet Dealership Enrollment Form](#) available through the [fleet.toyota.com](http://fleet.toyota.com) or the respective TMNA/PD FFM/ Fleet manager
- ii. Comply with all policies, procedures and guidelines for each applicable fleet program in effect

#### Once enrolled, the Selling Dealer:

- Assists the Fleet Accounts in applying for Toyota Fleet Identification number
- Negotiates the price with the Fleet Account
- Obtains a purchase order from the Fleet Account or FMC
- Registers for online access to TMNA fleet website for ordering and checking status of fleet vehicles
- Places order for the Fleet Account if the Fleet Account or Fleet management/ Commercial leasing company does not have direct access to [fleet.toyota.com](http://fleet.toyota.com)
- Completes the [Dealer Pricing Approval Form](#) and [Fleet Dealer Approval for Fleet Account Ordering Access](#) allowing selected Fleet Accounts and Fleet management companies to enter orders directly through [fleet.toyota.com](http://fleet.toyota.com)
- Ensures the Fleet Account has sufficient financing to complete the fleet transaction
- Assists in arranging financing for the commercial account
- Ensures that a sufficient line of credit is available to accommodate fleet business
- Requests the secondary dealer code from TMNA with the appropriate documentation to support separate
- Assists in locating a TED dealer for commercial deliveries if the driver is more than 35 miles from his dealership
- Receives VIN status information through FTC
- Provides the vehicle information delivery packet to delivery dealer
- Reviews the dealer invoice to ensure that the published fleet incentive is reflected on the dealer invoice
- Receive the payment for the vehicle
- Notifies TMNA/ PD of any order cancellations or modifications
- Coordinates with the facing TMNA region or Private Distributor to facilitate training

### 4. Delivering Dealer – To deliver a vehicle sold by another dealership, a dealer must:

- i. Complete the online [Fleet Dealership Enrollment Form](#)
- ii. Comply with all applicable fleet policies, procedures and guidelines in effect

#### Once enrolled, the Delivering Dealer:

- Negotiates the TED fee with the commercial account or selling dealer, not to exceed \$250 per delivery
- Provides a designated Toyota Executive Delivery Coordinator
- Registers the TED coordinator in the TMNA staff master
- Registers for online access to [fleet.toyota.com](http://fleet.toyota.com) for tracking courtesy delivery vehicles
- Receives the vehicle information delivery packet from commercial account/ FMC/Commercial leasing company or selling dealer
- Receives and inspects the vehicle on behalf of the selling dealer per the transportation procedures as specified in the [TLS Transportation Claims Policy and Procedure manual](#)
- Notifies the customer that the vehicle has arrived
- Completes vehicle registration and title documentation, if applicable
- Performs the pre-delivery service and installs a full tank of fuel on Commercial program vehicles in accordance with TMNA prescribed procedures, as outlined in the TMNA Warranty Policy and Procedure manual (<https://wrc.toyota.com/Toyota/Home.aspx>)
- Receives Warranty reimbursement for performing the PDS and adding a full tank of fuel on Commercial program vehicles
- Stores the commercial program trade-in fleet vehicle for a maximum of 10 working days (M-F excluding National holidays)

- Provides a quality delivery experience
- Charges a storage fee for commercial program trade-in vehicles remaining on their premises after 10 working days (with prior notification)
- Requests the registration/ title reimbursement from the Commercial account or FMC/Commercial Leasing Company per the instructions given

**5. Commercial Account/ Government municipality:**

- Requests a Toyota Fleet Identification number (FID) if ordering through a dealer
- Requests a Customer Identification number (CID) if ordering through a Fleet Management Company (FMC)
- Arranges the financing through a dealer or commercial lending institution or bank
- Negotiates sales price with the selling dealer
- Negotiates the courtesy delivery fee with the delivery dealer
- Submits the orders to TMNA, or to dealer depending on dealer agreement
- Pays the delivery dealer the courtesy delivery and registration/ title fees
- Picks up the trade-in fleet vehicle

**6. Fleet Management /Commercial Leasing Company (FMC):**

- Requests a Toyota Fleet Identification number (FID) for each program
- Assists the Commercial or RAC customers in applying for Toyota Customer Identification number (CID)
- Negotiates the sales price with selling dealer
- Negotiates the courtesy delivery fee with the delivery dealer
- Provides the financing and services to the commercial or RAC customer
- Submits the orders from the Commercial or RAC customers to TMNA
- Tracks the status of orders
- Provides the vehicle information delivery packet to delivery dealer
- Pays the delivery dealer the courtesy delivery and registration/ title fees
- Picks up the trade-in fleet vehicle

**7. Corporate RAC/ Licensee/ Independent Accounts:**

- Requests a Toyota Fleet Identification number (FID) if ordering through a dealer
- Requests a Customer Identification number (CID) if ordering through a Fleet Management Company (FMC)
- Negotiates the price with selling dealer
- Provides the financial arrangement for purchase from dealer
- Submits the orders to TMNA or dealer depending on dealer agreement and/or financing arrangement
- Provides TMNA/ PD a monthly delivery matrix to ensure production capacity

**8. Other Accounts:**

- Requests a Toyota Fleet Identification number (FID)
- Negotiates the price with selling dealer
- Provides the financial arrangement for purchase from dealer
- Submits the orders to TMNA or a dealer depending on the dealer agreement and/or financing arrangement
- Provides TMNA/ PD a monthly delivery matrix to ensure production capacity

### iii. Vehicle Delivery – Through a TED Dealer

- Commercial Accounts can request courtesy deliveries on a nationwide basis. A list of Toyota Executive Delivery (TED) dealers is available on [fleet.toyota.com](http://fleet.toyota.com) (FTC) /Toyota Executive Delivery/Participating Dealers.
- As key participants of the Commercial TED program, TED dealers will:
  - i. Perform quality courtesy delivery of vehicles
  - ii. Appoint a dealership contact to coordinate deliveries

- iii. Negotiate a delivery fee not to exceed \$250.00 per vehicle

**The TED delivery process is as follows:**

1. **The selling dealer or FMC notifies the TED 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.

The TED dealer can access a list of incoming deliveries in two systems:

- FTC under “Order – Status” by entering the dealer code, dealer type as shipping dealer and pressing “Search”
- Dealer Daily under “Vehicle reports – Commercial Delivery, Delivery Dealer”

2. **The Commercial account, FMC or selling dealer sends the TED dealer a Vehicle Information Delivery Packet.** The Delivery Packet must include:

- Dealer invoice/ Bill of Sale
- Certificate of Origin (if applicable)
- Contact information for Driver
- Title and registration instructions
- Power of Attorney for title and registration of vehicle (if applicable)
- Instructions for title and registration fees and courtesy delivery reimbursement
- Any special Instructions

3. **The delivering TED dealer notifies the Driver that the vehicle has arrived and is ready for pick up.**

4. **To the extent applicable, the Commercial Account or FMC confirms the turn-in arrangements with the delivering dealer.** In most cases, the dealership delivering the new vehicle has first right of refusal to purchase the vehicle being turned in.

5. **The Driver picks up the new vehicle within 10 working days (M-F excluding National holidays) of being contacted by the delivering dealer.**

- The dealer may charge a reasonable and customary storage fee for vehicles not picked up within that time. The storage fee must be disclosed to the Fleet Account/ FMC/Commercial leasing company prior to the arrival of the vehicle to exercise the right to charge a storage fee.
- If the order has a specific delivery window and the vehicle arrives more than 10 working days (M-F excluding national holidays) prior to the first day of the delivery window, the Driver is not required to pick up the new vehicle in advance of the delivery window. The delivering dealer has the right to request compensation from TMNA Fleet for reasonable storage fees from the time of vehicle delivery at the dealership to the delivery window.

6. **(Optional) The Commercial Driver turns in the previously used vehicle at the delivering dealership.** The returned vehicle should be picked up from the dealership within 10 working days (M-F excluding national holidays).

- The vehicle is stored in a secure spot on the dealership lot until it is picked up by an auction company or another authorized agent of the FMC.
- The delivering dealer may charge a reasonable and customary storage fee for returned vehicles not picked up within the 10-day window. The storage fee must be disclosed to the Fleet Account/ FMC/Commercial leasing company prior to the arrival of the vehicle to exercise the right to charge a storage fee.

7. **The Selling Dealer, Commercial Account or FMC reimburses the TED dealer for vehicle registration and titling.**

**8. The TMNA Warranty department reimburses the TED dealer for performing the Pre-Delivery Service (PDS) and installing a full tank of fuel.**

- Vehicles delivered into Private Distributor areas or Upfit vehicles will already have the PDS completed, therefore there will only be automatic reimbursement for a full tank of fuel.
- Delivering dealer preforms the Pre-Delivery Service on all vehicles, including upfit vehicles.

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2.2	08/25/2017	New Document Creation