

Customer financing pre-approval

This workflow automatically processes customer financing pre-approval requests by capturing application data, checking credit scores, routing to appropriate lenders, and providing instant pre-approval decisions to accelerate RV sales.

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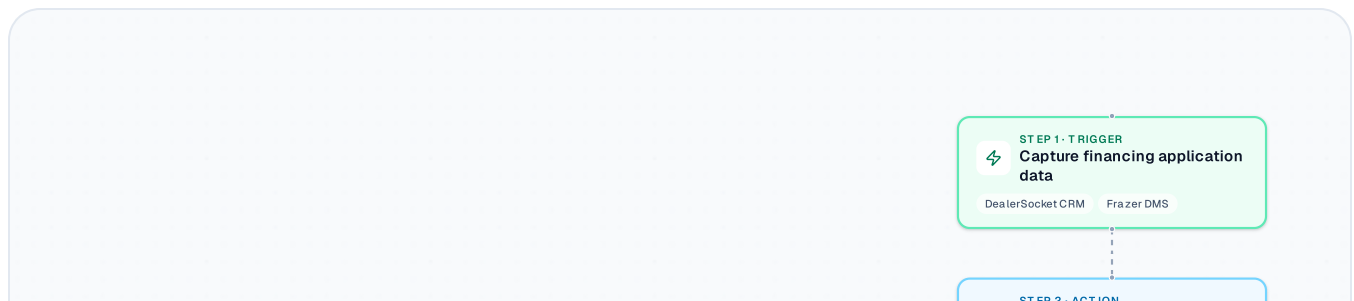
WORKFLOW TRIGGER

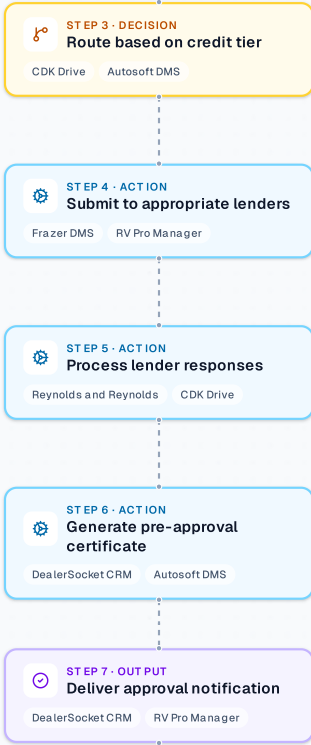


Customer submits financing pre-approval request through dealership website or in-person application

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Capture financing application data

Customer financing application is received with personal information, income details, and desired RV purchase amount. Application data is automatically parsed and validated for completeness.

2

 ACTION

Pull credit report automatically

System automatically retrieves customer credit score and credit history using integrated credit bureau services. Credit data is securely stored in the customer record.

DealerSocket CRM

Reynolds and Reynolds

3

 DECISION

Route based on credit tier

Workflow branches customers into prime, near-prime, or subprime categories based on credit score ranges. Each tier follows different lender approval paths and terms.

CDK Drive

Autosoft DMS

4

 ACTION

Submit to appropriate lenders

Application is automatically submitted to pre-configured lender network based on credit tier. Multiple lenders may be contacted simultaneously for competitive rates.

Frazer DMS

RV Pro Manager

5

 ACTION

Process lender responses

System collects approval decisions, interest rates, and loan terms from lenders. Best available offer is automatically selected based on dealership profitability rules.

Reynolds and Reynolds

CDK Drive

6

 ACTION

Generate pre-approval certificate

Automated pre-approval letter is created with financing terms, monthly payment estimates, and expiration date. Customer and sales team are immediately notified of approval status.

DealerSocket CRM

Autosoft DMS

7

 OUTPUT

Deliver approval notification

Pre-approval certificate is automatically sent to customer via email and SMS, while sales team receives internal notification with financing details to begin RV selection process.

DealerSocket CRM

RV Pro Manager



Outputs

- Pre-approval certificate with financing terms

AI Business OS

- Customer notification via email and SMS
- Sales team alert with customer financing profile
- Updated customer record with credit and approval status



Key Metrics

- Pre-approval processing time
- Approval rate by credit tier
- Time from pre-approval to RV purchase



Tools & Integrations

- DealerSocket CRM
- Frazer DMS
- Reynolds and Reynolds
- CDK Drive
- Autosoft DMS
- RV Pro Manager

AI Business OS

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