

Delivery coordination and documentation

Automates the RV delivery process from sale completion through customer handover, ensuring all documentation is prepared, delivery logistics are coordinated, and customer satisfaction is tracked.

Download PDF

Get Your Blueprint



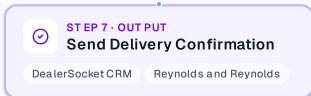
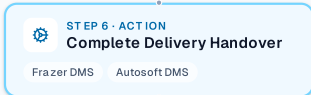
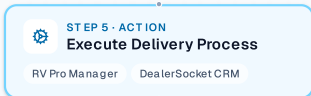
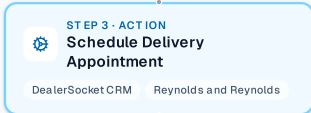
WORKFLOW TRIGGER

RV sale reaches 'Ready for Delivery' status in dealership management system

Visual Flow

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





+
-
↻

Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Sale Completion Detected

Monitors DMS for RVs that have completed the sales process and are flagged as ready for delivery. Initiates the delivery coordination workflow automatically.

2

 ACTION

Generate Delivery Documentation

Creates all required delivery paperwork including title transfer, warranty documents, owner's manual checklist, and pre-delivery inspection forms. Populates customer and RV details from the sale record.

Frazer DMS

RV Pro Manager

3

 ACTION

Schedule Delivery Appointment

Sends automated appointment scheduling options to customer via email/SMS and books delivery slot. Assigns delivery specialist and coordinates with service department for final prep.

DealerSocket CRM

Reynolds and Reynolds

4

 DECISION

Check Delivery Method

Determines if customer is picking up at dealership or requires delivery to their location. Routes workflow based on delivery preference indicated in sale.

CDK Drive

5

 ACTION

Execute Delivery Process

For pickup: Notifies customer and prepares RV at lot. For delivery: Coordinates transportation, creates delivery route, and schedules driver.

RV Pro Manager

DealerSocket CRM

6

 ACTION

Complete Delivery Handover

Records delivery completion, captures customer signature on delivery documents, and triggers post-delivery follow-up sequence. Updates inventory status to 'Delivered'.

Frazer DMS

Autosoft DMS

7

 OUTPUT

Send Delivery Confirmation

Delivers completed delivery packet to customer, updates CRM with delivery status, and schedules follow-up satisfaction survey for 48 hours post-delivery.

DealerSocket CRM

Reynolds and Reynolds



Outputs

- Completed delivery documentation packet
- Updated inventory and sales records



Key Metrics

- Average delivery completion time
- Customer delivery satisfaction score
- Delivery documentation accuracy rate



Tools & Integrations

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

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

COMPANY

[About](#)

[Industries](#)

CONNECT

[MVP.dev](#)

[LinkedIn](#)

RESOURCES

[Articles](#)