a Constellation Software Company

Manual Processes Guidance
for RV or Marine Dealership Business Continuity

In an era of global outages, being prepared is more critical than ever. Recently, major companies have faced outages, highlighting the importance of maintaining business continuity through manual processes to ensure uninterrupted operations, safeguard customer satisfaction, and prevent revenue loss.

Outages can result from power, internet, or software failures. This guide helps RV and marine dealerships maintain continuity during such disruptions by outlining manual processes for Sales and F&I, Parts, Service, and Accounting. It also details essential documents and the information to later input into systems.

Dealerships should customize these recommendations based on their specific circumstances to ensure a comprehensive, actionable preparedness plan.

Sales and F&I

Objective: To continue sales and F&I operations, including customer interactions, sales transactions, and financing arrangements, during system outages.

Manual Processes:

Customer Information Collection:

- Use a pre-printed **Customer Information Sheet** to record customer details such as name, contact information, and vehicle or boat preferences.
- Capture any lead information manually and note down specific interests or inquiries.

Sales Documentation:

- Fill out a **Manual Sales Agreement** form to document the vehicle or boat details, pricing, trade-in information, and any additional sales conditions.
- Use a **Unit Inspection** Form to note any visible conditions or damage on trade-ins or new sales.
- Print out a manual **Four-Square Desking Worksheet** to use to work deals with your customers.

F&I Documentation:

- Use a **Manual Finance Application** Form for customers seeking financing, capturing all necessary personal, employment, and financial information.
- Prepare a **Temporary Payment Agreement** if immediate payment is required and all systems are down. Document the amount, method of payment, and due date for official processing once the system is restored.
- Prepare a **Manual Menu Presentation** with specific product information sheets for each product in your presentation.

Insurance and Warranty:

- Record insurance details and warranty selections on a **Manual Insurance & Warranty Enrollment Form.**

Documents and Forms:

- Customer Information Sheet
- Manual Sales Agreement
- Unit Inspection Form
- Four-Square Desking Worksheet
- Manual Finance Application Form
- Temporary Payment Agreement
- Manual Menu Presentation
- Manual Insurance & Warranty Enrollment Form

Information to Collect:

- Customer name and contact details.
- Product details (make, model, VIN/HIN)
- Pricing, trade-in details, deposit information
- Financing information, payment terms
- Insurance and warranty preferences

Parts Department

Objective: To manage parts sales and inventory manually during system outages.

Manual Processes:

Parts Order and Sales:

- Use a **Manual Parts Purchase Order Form** to record customer orders, including part numbers, descriptions, and quantities.
- Note down the customer's contact information and preferred notification method for when parts arrive.

Parts Sales Invoices:

- Maintain **Manual Parts Sales Invoices** to be entered once operations are restored. Ensure date, part numbers, and quantities are recorded as well as payment method.

Inventory Management:

- Maintain a **Parts Inventory Log** to record stock levels manually, noting down received shipments and sales.

Documents and Forms:

- Manual Parts Purchase Order Form
- Manual Parts Sales Invoices
- Parts Inventory Log

Information to Collect:

- Customer name and contact details.
- Part numbers, descriptions, quantities.
- Stock levels received shipments.
- Invoice details, payment dates, and methods.

Service Department

Objective: To continue servicing units and managing service records during system outages.

Manual Processes:

Service Appointment and Check-in:

- Record appointments and check-ins using a **Manual Service Appointment Log**. Capture customer information, vehicle/boat details, and service requests.

Service Work Order:

- Use a **Manual Work Order Form** to detail the services provided, parts used, labor hours, and any additional notes on the service performed.

Job Tracking:

- Maintain a **Service Job Tracking Sheet** to monitor the status of ongoing services, prioritizing urgent jobs and noting estimated completion times.

Documents and Forms:

- Service Appointment Log
- Manual Work Order Form
- Service Job Tracking Sheet

Information to Collect:

- Customer name and contact details.
- Vehicle/boat details, service requests.
- Services provided, parts used, labor hours.

Accounting Department

Objective: To manage financial transactions, including sales, expenses, and payroll, during system outages.

Manual Processes:

Sales and Payment Recording:

- Use a **Sales Transaction Log** to manually record sales transactions, including customer details, amounts, and payment methods.
- Prepare **Manual Receipts** for any payments received.

Expense Tracking:

- Maintain an **Expense Log** to track dealership expenses, noting down the amount, purpose, and vendor details.

Payroll Processing:

- Record employee hours and wages on a **Manual Payroll Sheet,** ensuring accurate payment calculations.

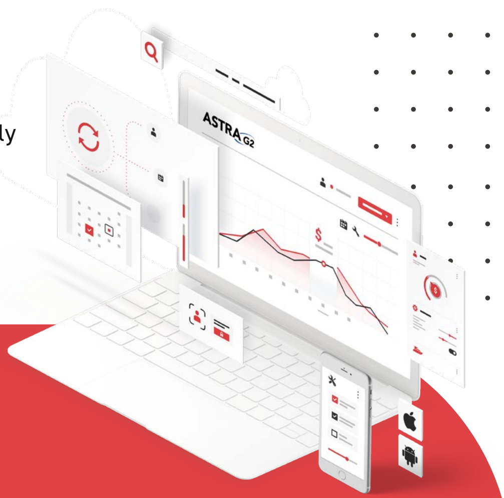
Documents and Forms:

- Customer Information Sheet
- Manual Sales Agreement
- Unit Inspection Form
- Four-Square Desking

Information to Collect:

- Customer name and contact details.
- Product details (make, model, VIN/HIN)
- Pricing, trade-in details, deposit information
- Financing information, payment terms
- Insurance and warranty preferences

Post-Outage System Input



After the system is restored, ensure a team is assigned and responsible for entering all manually collected data into the system of record (DMS). This includes updating customer records, inventory levels, service records, sales transactions, and financial data. Conduct a thorough review to confirm that all manual records match the system entries and resolve any discrepancies immediately.

Tips for Effective Manual Processing:

Assign a Manual Processing Response Team: Assign a team to manage the manual processing functions should they be required.

Pre-print Forms: Ensure all necessary forms are printed and readily available if required.

Training: Train staff on manual processes to ensure smooth transitions during outages.

Communication: Clearly communicate the manual processes to all employees and ensure they understand the importance of detailed record-keeping.

Document Destruction: Have a process in place for the safe destruction of manually captured information that is not required to be safely stored for financial record keeping. For example, ensure you have a paper shredder or a secure bin for offsite document destruction.

Maintaining detailed and organized manual records will ensure that your dealership can continue operating effectively during system outages and facilitate a smooth transition back to digital systems once they are restored.