

# CDK Drive

SRM

# Connector

The SRM Connector for CDK Drive simplifies your Repair Order (RO) processing by enabling SRM Case to create and update Repair Orders. By directly connecting SRM Case to your business system and integrating the data across both systems, service providers benefit from the following:

- **Easier estimate creation with integrated pricing and parts availability**
- **Automatic case closure**
- **More repair documentation with less double-entry**
- **Increased transparency with customers**
- **Identification of credit risks prior to RO**

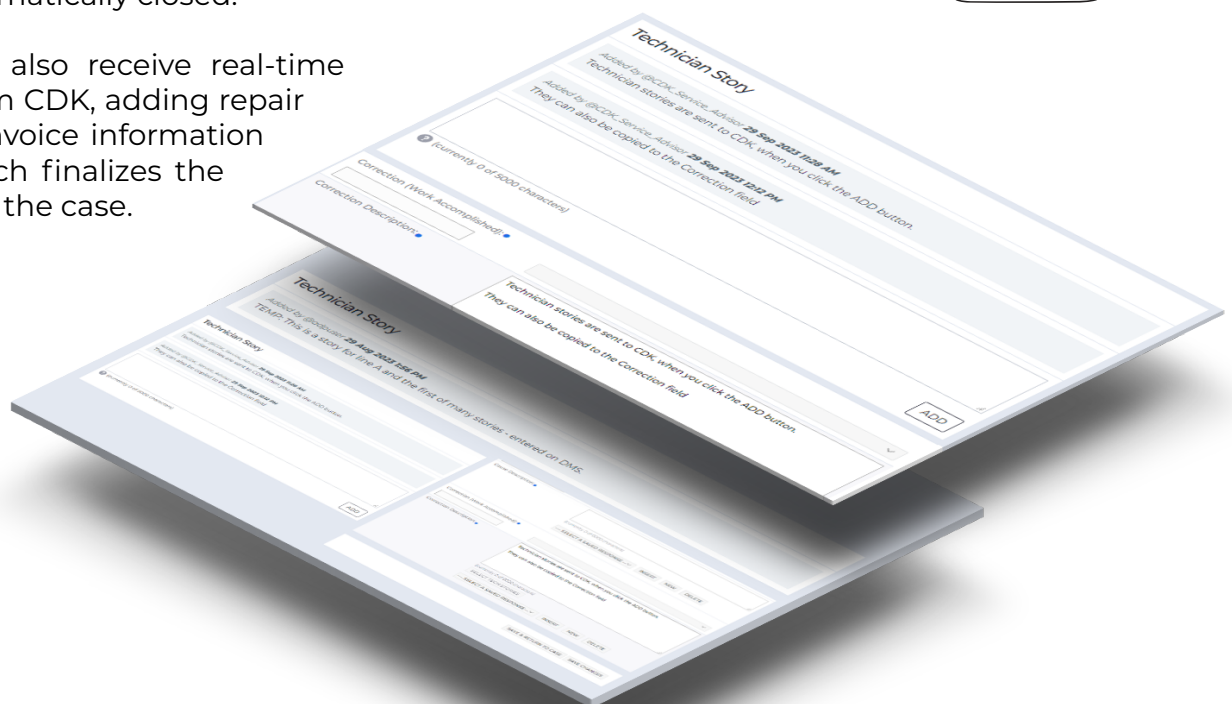
Streamline your service operations by integrating your data flows between SRM Case and the CDK Drive Service Module.

## Streamline Cases from Beginning to End

The SRM Connector streamlines estimate creation with integrated data flows for customer-specific labor and parts pricing, including availability tracking from CDK. The SRM Case/CDK Drive integration enabled with the SRM Connector allows the customer to review and approve the estimate and the service provider to seamlessly transition the estimate to an RO.

SRM Case will also receive real-time notification whenever a repair order is closed on the CDK Drive DMS so that the associated Decisiv case can be automatically closed.

SRM Case will also receive real-time notifications from CDK, adding repair outcomes and invoice information to the case, which finalizes the repair and closes the case.



## Share Complaint, Cause, and Correction Data

Service Providers understand that it is essential for technicians to document the repair process of any task performed and communicate the findings to the customer. Regardless of your service process, you can use Technician Story and Operation Correction integrations to simplify this for your technicians.

**Technician Story Integration:** Define your service process and have your technicians record their findings and repair procedures in CDK Drive or SRM Case. The integration will do the rest, updating the connected systems and keeping them in sync.

**Operation Correction Integration:** You can easily update the “correction” field in SRM Case with repair details to share with your customer. When you do, those details will also seamlessly appear in the Repair Order during the RO update process.

## Credit Hold Status\*

Improvements to the credit check interface continue to expand the information provided by CDK Drive to be easily managed in SRM Case. This helps you identify any potential concerns prior to RO creation or upsells, and avoid the financial impact of extending credit to customers who represent potential credit risks.

**Efficiency Unleashed:** Manual credit hold management is a thing of the past. With Decisiv’s new Active Credit Modal, whenever a credit risk is identified by the CDK DMS, the concern can be easily and directly resolved in SRM Case prior to the sale.

**Consistency Guaranteed:** The same credit risk information helps you when you create ROs in both SRM Case and CDK Drive. Whether a customer is over their credit limit or on hold, the process remains aligned.

\*Coming soon

IMPROVE YOUR SERVICE OPERATIONS  
WITH THE SRM CONNECTOR FOR CDK DRIVE

**Decisiv**™

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