

iService Release Notes Version 3.18

Table of Contents

eSign for Mobile Check-in	1
Texting & Anti-Spam Registration (10DLC).....	2
Multi Point Inspection Updates.....	2
Streamlined Approvals in Lightyear	3
Exclude Specific Customers	4
Payments	5

eSign for Mobile Check-in

BETA RELEASE

Mobile Check-in now supports eSignatures

Just hand the customer a tablet, they'll sign Lightyear's work order, and it automatically saves to DealerBuilt's enterprise-wide Document Management archive.

WORK ORDER
RO NUMBER: 370515

CUSTOMER INFORMATION

Make	Year	Model
Toyota	2011	Camry
Color	Black	Engine
Plate	CA 5B1234	Transmission
Phone	(916) 555-1234	MPG
Address	123 Main St	City
State	CA	Zip

VEHICLE INFORMATION

Make	Year	Model
Toyota	2011	Camry
Color	Black	Engine
Plate	CA 5B1234	Transmission
Phone	(916) 555-1234	MPG
Address	123 Main St	City
State	CA	Zip

SERVICE INFORMATION

Service	Rate	Engine
Oil Change	\$29.95	Filter
Wash & Wax	\$19.95	Wax
Brake Pad	\$149.95	Brake
Alignment	\$149.95	Alignment
Tire Rotation	\$19.95	Tire
Fluid Top-off	\$19.95	Fluid
Wash & Wax	\$19.95	Wax
Brake Pad	\$149.95	Brake
Alignment	\$149.95	Alignment
Tire Rotation	\$19.95	Tire
Fluid Top-off	\$19.95	Fluid

LABOR INSTRUCTIONS

Task	Status
Complimentary multi point inspection	Completed
Complaint added by QA test automation	Completed
Complaint added by QA test automation	Completed
Perform 26-point Multi Point Inspection	Completed

WAITING

Back to Checkin

Sign

Interested in joining the beta? Contact your Performance Manager.

Texting & Anti-Spam Registration (10DLC)

Anti-Spam Registration (10DLC)

To continue delivering outbound text messages, wireless carriers now require you to prove your phone number belongs to a legitimate business.

 [Click here to submit your information](#) (est. 2 minutes)

Higher Character Limit

We've increased the character limit on text messages from 320 to 1,500. It's still best practice keep them short so they're easy to read, plus some wireless carriers may decline to deliver extremely long messages.

Multi Point Inspection Updates

Increased Readability

Printed Multi Point Inspections now use a larger font size for improved readability. 🎨

Pro Tip: Simplify Technician Recommendations

Did you know your MPI can recommend relevant op codes based on what fails inspection? This makes it simpler to tap *brake pads* when the brakes fail.

Multi-Point Inspection

Brakes Configuration

Front Passenger

1mm 

Recommended Op Codes

FBP Customer States replace front brake pads.	Add to Quote
FBPR Customer States replace front brake pads and rotors	Add to Quote

Just complete this simple, one-time setup:

1. Go to *Settings > MPI Templates > Edit a template*
2. Click *Next*
3. On the first inspection item, pick the Op Codes to recommend. Repeat as needed on the rest of the form!

New Honda Template

Honda dealerships have a new MPI Template that matches their OEM's styling, to help customers recognize it when they fill out their visit satisfaction survey.

To use it: When your Technician choose which MPI to fill out, have them use "Honda Multi Point Inspection".

For convenience, only the customer-facing views display in a new format (Technicians won't notice much of a difference on their end).

You may want to setup Op Code recommendations on the new template – see the section above for details.

Honda Multi Point Vehicle Inspection Checklist

HONDA

VEHICLE ID	370551	PAID NUMBER	
VIN	6514654848FD	RELEASE	1
SERVICE ADVISOR	Hosmer Dealerbuilt	TECHNICIAN	Bri Borchardt

☒ Satisfactory
 ☐ May Require future attention
 ☐ Requires Immediate Attention

Under Hood / Exterior	Tire Condition						
Headlights (check high and low beams)/Tailights/Brake lights/Hazard warning lights/Turn signals/Exterior lamps	<table border="1"> <tr> <td>Left Front</td> <td>Tire tread 10 32nds</td> <td>Right Front</td> </tr> <tr> <td>Left Rear</td> <td>Tire tread 10 32nds</td> <td>Right Rear</td> </tr> </table>	Left Front	Tire tread 10 32nds	Right Front	Left Rear	Tire tread 10 32nds	Right Rear
Left Front	Tire tread 10 32nds	Right Front					
Left Rear	Tire tread 10 32nds	Right Rear					
Interior light							
Windshield washer spray/Wiper operation/Wiper blades/Windshield condition							
Parking brake	<table border="1"> <tr> <td>Left Front</td> <td>10 mm</td> <td>10 mm</td> </tr> <tr> <td>Left Rear</td> <td>10 mm</td> <td>10 mm</td> </tr> </table>	Left Front	10 mm	10 mm	Left Rear	10 mm	10 mm
Left Front	10 mm	10 mm					
Left Rear	10 mm	10 mm					
Horn operation							
Clutch operation (if applicable)							
Micron cabin filter**							

Under Hood

Battery

Check fluid levels: Oil/Coolant/Power steering fluid/Brake fluid/Windshield washer

Please Indicate Areas of External Damage or Wear



Streamlined Approvals in Lightyear

Fewer Clicks for the Parts Department

When customers approve work, the Estimates window now automatically checks *Approved* on the parts. Now you can simply tap *Apply* to transfer the parts.

If you aren't seeing this happen, you may need to enable a setting in Lightyear under App Preferences > Estimating > Default approval checkboxes.

Automatically Add Approvals to the RO

For Lightyear dealerships who quote via iService, a new setting allows you to automatically add Approval jobs to the RO so Parts Agents only need to transfer the parts (allowing them to order).

To make the switch:

- Enable this setting
You can do so in iService under *Settings > Create a Quote > Writeback an Estimate AND an RO Job*
- Adjust Parts' approval workflow
In Lightyear's Estimates window, after they tap *Apply* just select the correct job instead of inserting a new one.

Specifications for Applying an Estimate to an RO Job

Select the Job to apply to your selected Estimate.
Then, select the Estimate elements to apply.
Last, select the RO Job elements to keep.
Complaints will be combined for history.

Select a Job to apply to this Estimate:

Complete	Estimate Pay Type
RO: 370572 (2025-02-12) => Job: 1 - Complementary multi point inspection	C
RO: 370572 (2025-02-12) => Job: 2 - Customer Status replace front brake pads	C
RO: 370572 (2025-02-12) => INSERT AS A NEW JOB	

Apply these Estimate elements:

☒ Labor details
☐ Preserve Job Status
☒ Parts
☐ Sublets
☐ Operations
☐ Misc. Charges

Keep these existing RO Job elements:

☒ Labor details (includes Technicians)
☒ Parts
☒ Sublets
☒ Operations
☒ Misc. Charges (This job only)

Save Defaults

Exclude Specific Customers

Exclude Specific Customers

Some dealerships don't want iService to import ROs from specific customers, like fleet accounts. Lightyear dealerships have a new setting to exclude them!

To set it up:

1. Go to iService > Settings > Create a Quote
2. Scroll down to the bottom and choose the desired customers. This will prevent future ROs from importing.

Exclude Customers from importing Repair Orders

▼

Q

Name	Can Contact?	Phone	Email	Remove
No records to display				

Pro Tip: Opting Customers Out

Did you know about all of these other options for Service Lane customers who shouldn't get text messages? You may find them useful on sublets from other shops, for example.

1. At check-in, add the op code *STOPTEXTS* (skips text messages for this visit)
2. In the customer profile, click *Do Not Contact* (skips text messages indefinitely)
3. Customers can opt themselves out by responding *STOP* via text message
4. Support can configure whether your internal ROs import. To change this setting, contact support@dealerbuilt.com

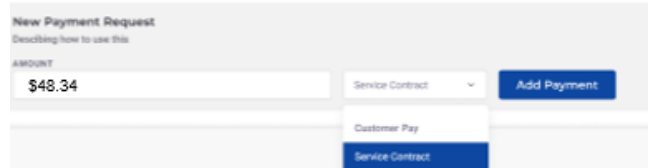
Payments

Service Contract Payments

If you use Global Pay, it just got simpler to accept cards from Service Contract companies.

How it works

Just change the pay type when you're creating the payment. After you enter the card details, a Service Contract distribution will push to Lightyear 🚀



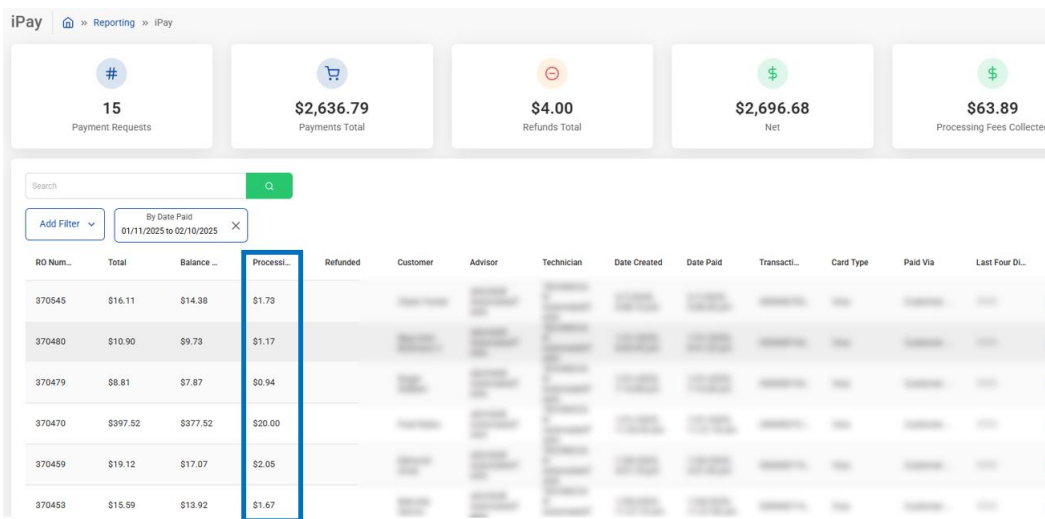
The screenshot shows a 'New Payment Request' form. The 'AMOUNT' field contains '\$48.34'. Below it, there is a dropdown menu for 'Service Contract' with options 'Service Contract', 'Customer Pay', and 'Service Contract' (highlighted in blue). An 'Add Payment' button is visible to the right.

Quick Setup

Just indicate which Payment Method is the correct one for Service Contract payments. You can do so here: *iService > Settings > Payments*

Reporting Update

If you pass a processing fee through to customers, your iPay reports now have a column showing these transaction-level fees, in addition to the grand total & balance paid.



The screenshot shows the iPay Reporting interface. At the top, there are five summary cards: Payment Requests (15), Payments Total (\$2,636.79), Refunds Total (\$4.00), Net (\$2,696.68), and Processing Fees Collected (\$63.89). Below these is a table with the following columns: RO Num..., Total, Balance..., Processi..., Refunded, Customer, Advisor, Technician, Date Created, Date Paid, Transacti..., Card Type, Paid Via, and Last Four DI... The 'Processi...' column is highlighted with a blue box, showing values like \$1.73, \$1.17, \$0.94, \$20.00, \$2.05, and \$1.67.