

iService Release Notes Version 3.19

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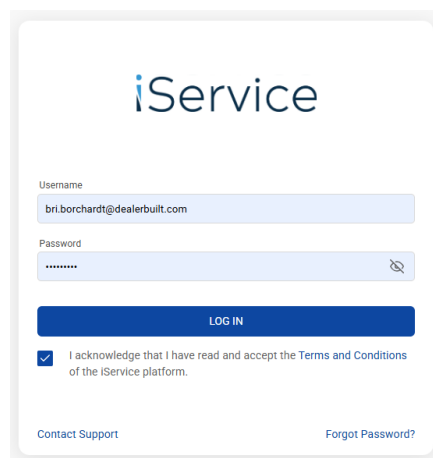
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Login & SSO

The login screen got a modern refresh, and Lightyear customers can now enable Single Sign On.

SSO enables your employees to login using their DMS credentials. Users can be managed centrally – in Lightyear – and it expands Multi Factor Authentication to iService (if it's enabled for the DMS).

To enable SSO, contact your Performance Manager.

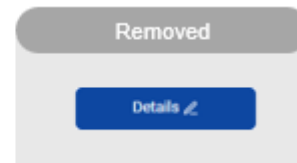
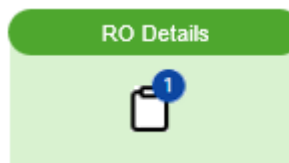


The image shows the iService login interface. It features the 'iService' logo at the top. Below the logo are two input fields: 'Username' with the email 'bri.borchardt@dealerbuilt.com' and 'Password' with masked characters. A 'LOG IN' button is positioned below the password field. Underneath the button is a checkbox that is checked, with the text 'I acknowledge that I have read and accept the Terms and Conditions of the iService platform.' At the bottom of the form, there are two links: 'Contact Support' on the left and 'Forgot Password?' on the right.

Advisor Dashboard Update

On the Advisor Dashboard we've removed duplicate buttons to clear up space.

RO Details is a page for editing customers, tracking internal notes and reviewing timestamps. You can continue to open it using the clipboard icon, and the duplicate *Details* button was removed.



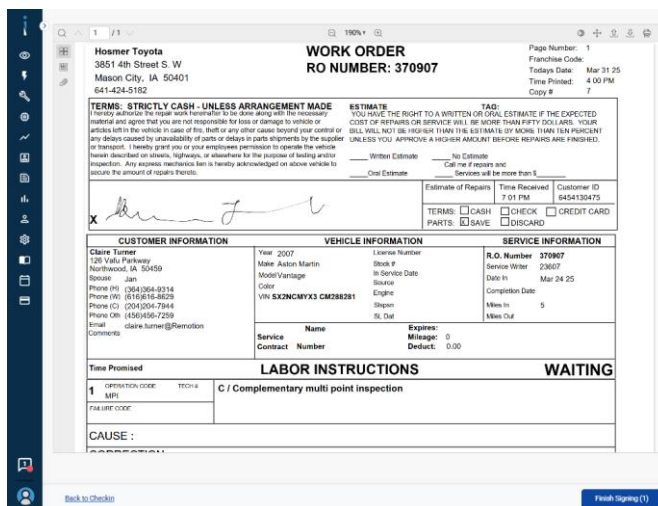
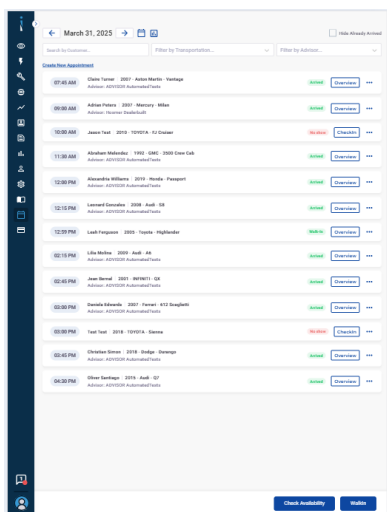
Job Fees on Estimates

Due to regulations in Michigan, California, and Florida, some service lanes enable *Additional Quote Compliance* to show more details on estimates (like part numbers). We've updated the fee granularity on these quotes so they're shown for each job individually.

You can check whether this setting's enabled under *Settings > Create a Quote*.

Mobile Check-in Updates

The Appointments page has a more tablet-friendly view and signed work orders now save centrally to Lightyear's Document Management module. For Enterprise Retail Cloud users, they're also viewable from several windows in Lightyear. 👍



There's also a new *Check-in* column on the Advisor Dashboard, so you can monitor for missed signatures and quickly view the walk-around video.

Advisor Dashboard

Search

Sort by Priority

Create New Repair Order

Add Filter

Open

By Date

03/24/2025 to 03/28/2025

RO #	Tag #	Customer Name	Check-in	MPI	Quote	Video	Check-out	Service Phases
370907		Claire Turner	Complete	Viewed	Complete	Not Started	Paid	Work Compl...
370913		Michele Tapia	Not Started	Viewed	Complete	Not Started	Paid	Dispatch

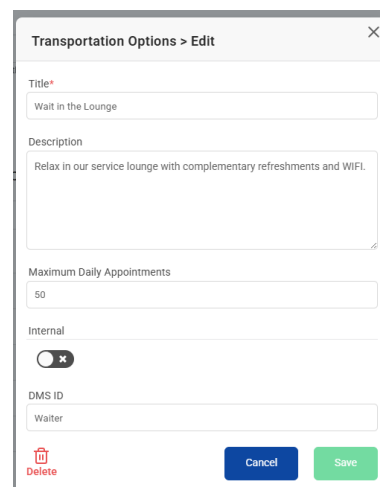
Texting Documents

We've made it easier to attach files to text messages, for dealerships who need to share 3rd party documents.

Daily Max. by Transportation Type

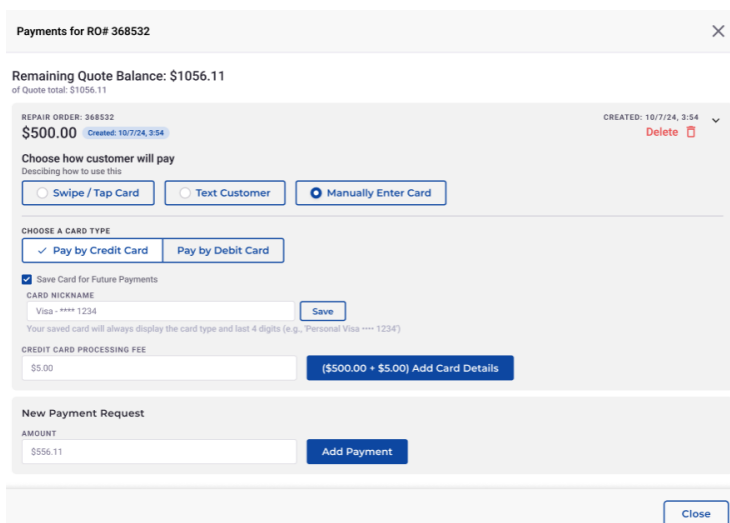
Do you limit the number of waiters, loaners, or pickup & delivery appointments each day? A new setting for Online Service Scheduling allows you to control how many daily appointments are allowed for each transportation type.

To set it up, go to *Settings > Scheduler Settings > Transportation Types*.

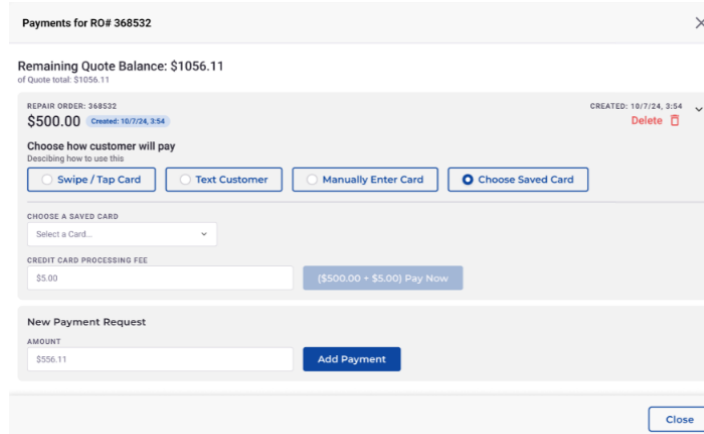


Payments: Card on File & Parts Refunds

Global Pay customers can securely save a customer's card for future use. During check-out, just tap *Save card for future use*:



The card saves securely in Global Pay's vault, and the next time this customer checks out you can pay with the saved card:

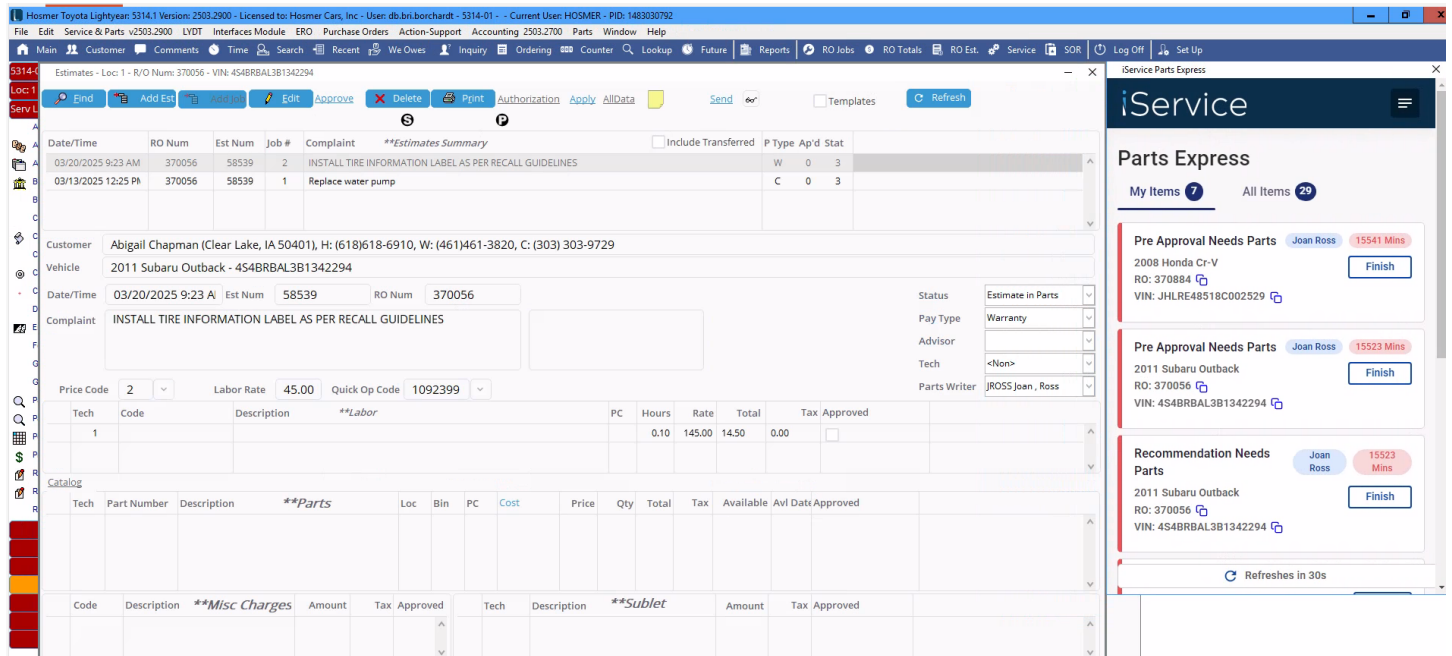


We've also updated Parts Refunds to better support Credit Memos.

Beta release: Streamlined Parts Workflow

Beta testing begins on a new Parts task list that streamlines estimation for Parts Writers 🚀

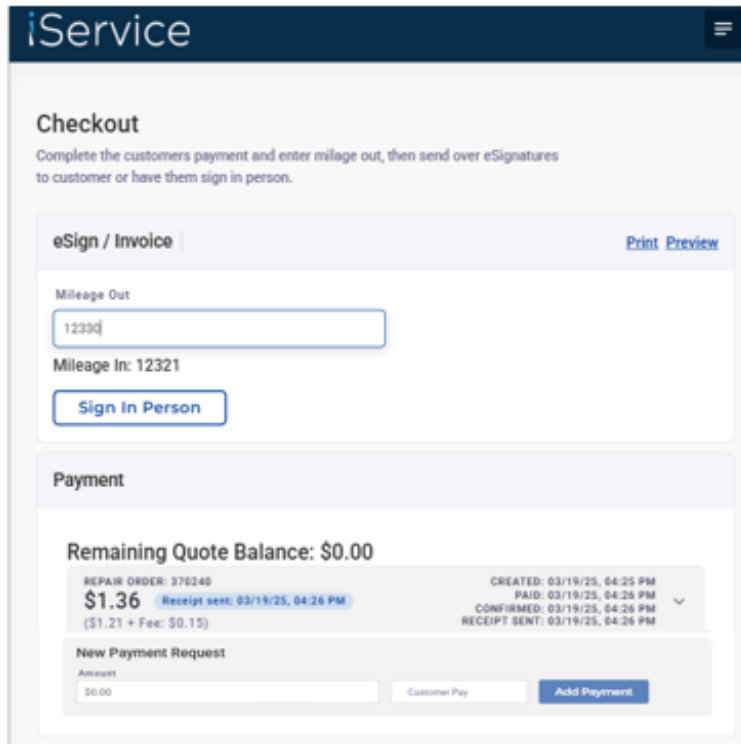
Stay up-to-date with auto-refresh & a focused view, and you'll love the new automation that minimizes clicking in the Estimates window.



Stay tuned for more details about general release!

Beta release: eSign Customer Invoices

A new check-out workflow's available to sign invoices and take payments in one easy swoop!



iService

Checkout

Complete the customers payment and enter milage out, then send over eSignatures to customer or have them sign in person.

eSign / Invoice [Print](#) [Preview](#)

Mileage Out

Mileage In: 12321

Payment

Remaining Quote Balance: \$0.00

REPAIR ORDER: 376248	CREATED: 03/19/25, 04:25 PM
\$1.36 Receipt sent: 03/19/25, 04:26 PM	PAID: 03/19/25, 04:26 PM
(\$1.21 + Fee: \$0.15)	CONFIRMED: 03/19/25, 04:26 PM
	RECEIPT SENT: 03/19/25, 04:26 PM

New Payment Request

Amount

Everything saves back to Lightyear – the signed customer invoice, mileage out, and the distribution. Reach out to your Performance Manager if you're interested in a sneak peek or joining the beta.