

iService Release Notes Version 3.21.6

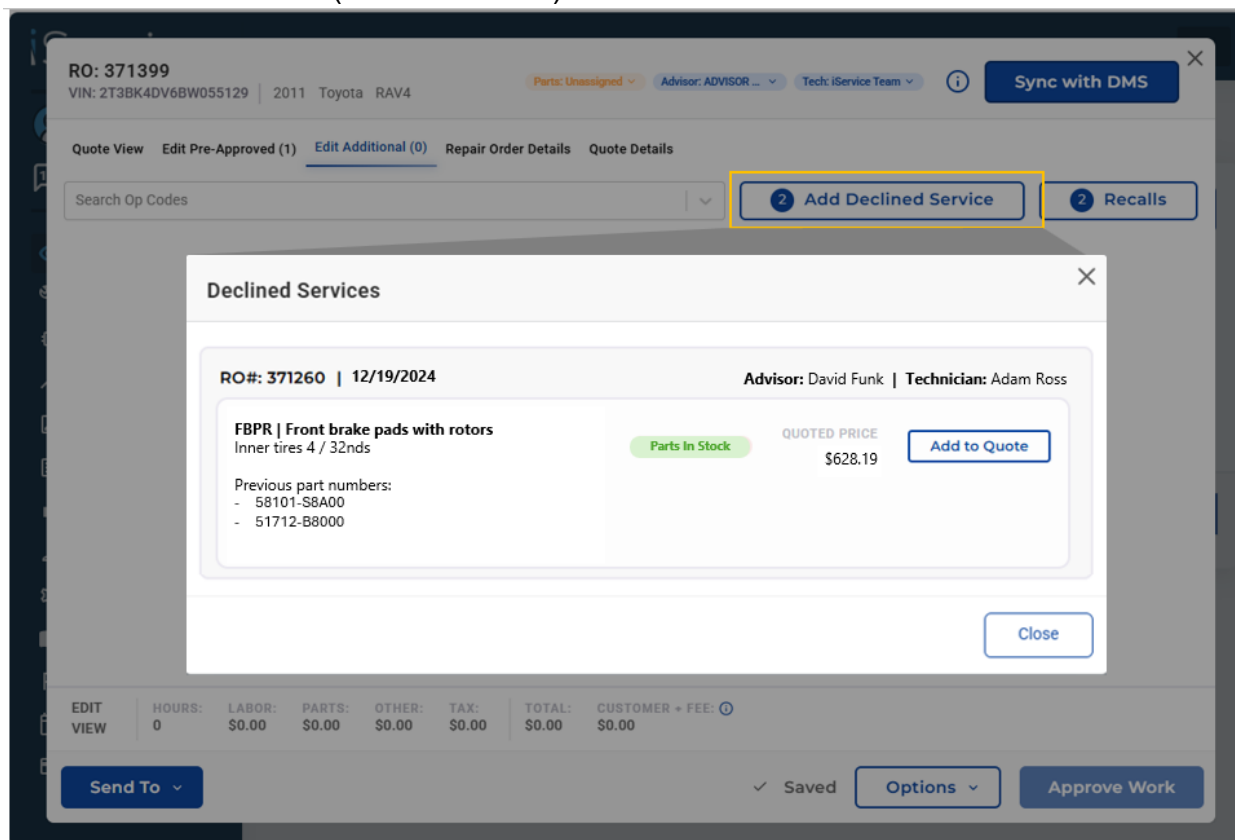
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Recommend Previous Declines

Help your team **recover lost revenue** by making it easier to resell previously declined services — without chasing history or redoing estimates.

Advisors can now quickly recommend them during scheduling, check-in & quoting. Just look for the *Add Declined Services* button (next to Recalls):



FAQ

Where does the info come from?

We pull it from the most recent closed RO in iService. If you use Lightyear, it also checks the Estimates module. Only jobs that were clearly marked *declined* will show up – anything left undecided is left out.

How do parts work?

Parts staff will see a note listing the part numbers used last time. They can re-use them or swap in new ones as needed – whatever works best for the current job.

Customize Footnote on Quotes

You now have the ability to **edit the footnote that appears at the bottom of every quote** your team sends to customers.

Subtotal:
Fees: \$14.14
Tax: \$14.11
Approved Total: \$223.25

Total includes taxes and fees (ex. Oil disposal fee)

Why It Matters:

This is a great way to **clarify what's included in the estimate**—like shop supplies, environmental fees, taxes, or any disclaimers. It helps manage expectations and reduce call-backs or confusion.

What You Can Do:

- Add standard fee explanations (e.g., *"Includes shop supplies and disposal fees"*)
- Communicate dealership-specific policies
- Adjust language to align with your customer experience goals

Where to Set It:

You'll find the option under *Settings > Customer App > Grand Total Description*.. Update it once, and it applies to all quotes moving forward.

Higher-Resolution Inspection Videos

We've upgraded the resolution on inspection videos — giving your customers a **clearer, more professional view** of their vehicle's condition. This helps build trust, improves transparency, and supports your advisors in visually reinforcing recommended work. No action needed!

Automate Support: Recycled RO Numbers

If you're using **Automate DMS**, we now support their approach to **RO number recycling**.

How It Works:

When an RO is closed in Automate, we'll now **automatically append the original RO's closure date** to preserve its history.

Example:

If RO #**12345** was closed on **June 10, 2025**, the RO number will display as: **12345-20250610**.

This ensures:

- The original RO stays intact
- Reused numbers don't overwrite prior service data
- Inspection history, estimates, and recommendations remain accurate

This update is live now — no setup required.

Recommendation Required to Complete Quote

To help you keep advisors following the right process, quotes now **can't be marked "Complete" unless there's at least one recommendation added**.

What You'll Notice:

Within a quote, Advisors can enter verbal approvals/declines and click *Approve Work* to mark the quote complete. Now that button will stay grayed out until something is recommended.

On the Advisor Dashboard, incomplete quotes are *white or red*.

Why It Matters:

This makes it easier to **spot when the recommendation step is being skipped**, so you can be confident your team is sticking to the process — not rushing past it.

No setup needed — this is already live and working behind the scenes.