iService Release Notes

Version 3.22.0

As usual, iService version 3.22.0 includes general bug fixes plus the latest & greatest enhancements. Read on below to learn about the new features and reach out to your Performance Manager with any questions.

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iService Core

Audio Alert: Quote Needs Review

Advisors now hear an **audio alert** when a quote is sent to them, so they can quickly review it and send to the customer.

When you hear the chime, glance at iService to spot the quote marked **Advisor In Progress** in bright red.

To review past notifications, go to *Notifications* > *Internal Messages* > *System*.

New Setting: Restrict Fees to Parts (or Labor)

Charges and discounts can now be restricted to **parts only**, **labor only**, or applied to the **grand total**. Previously only the Supplies Fee could be limited to one or the other.

All of your charges & discounts currently default to *grand total*. To change that:

1. Go to *Settings > Charges & Discounts > Edit*
2. Update the *Apply To* checkboxes

Restrictions are clearly displayed when employees review a quote, plus when they apply a charge or discount.

Payments

Refund Updates

We've improved the refunds workflow for clarity and to resolve an issue making same-day returns on PIN-verified debit card payments.

- **What's new?**
  PIN-verified transactions now show a **Refund** button instead of **Void**. This eliminates confusing errors and makes same-day refunds smoother. We've also removed a refund mode that's not compatible with this type of payment (return to same card), so users have clarity that they need to swipe the card that will be refunded.

- **Why it matters**
  PIN-verified debit card payments use a different processing network than all other transactions. They're unique in two ways:

	PIN-verified Debit Cards	All Other Payments
Settlement	Varies	Nightly batch
Refunds	Requires an *Independent Refund*, where you input the card to receive funds	Supports *Dependent Refunds*, where funds are returned to the original card

On the day of payment, users could **void** until the nightly batch settles. Voiding is advantageous because it avoids paying processing fees, but it's only possible until the payment settles. After the nightly batch, it's replaced by the **refund** option. PIN-verified debit cards would sometimes error because they can settle well before the nightly batch.

New Surcharging Settings

We've added two new enhancements to make surcharging more accurate, flexible, and compliant:

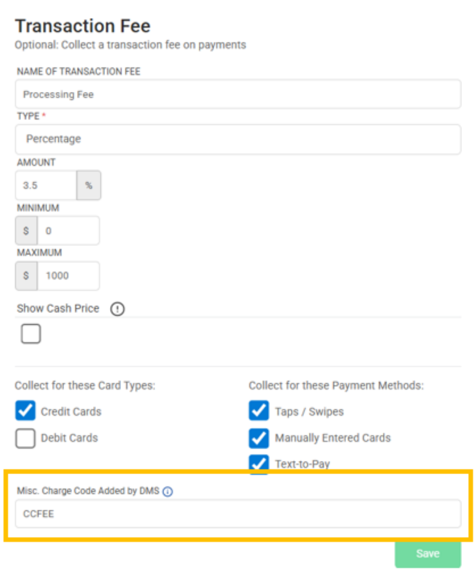
1. Itemized F&I Receipt
Dealerships that pass credit card processing fees through to customers now have more compliant and flexible accounting options.

- **What's new?** Finance payments with a surcharge now write back as **two payment methods** on receipts: one for the balance and one for the processing fee.
- **Why it matters**
  - Ensures receipts are **clearly itemized** for customers.
  - Allows fees to be tracked in a **separate G/L account**.
- **Other details**
  - In iService, Variable Ops has **two settings** to configure payment methods for the balance and fee.
  - The Payment Method controls the fee name shown on the receipt and the G/L account. They can be updated through Lightyear's Accounting Setup.
  - The service & parts departments were already well handled through Lightyear's miscellaneous charge functionality.

2. Setting: Misc. Charge used for Processing Fee

We've added a new setting to help surcharging dealerships collect the right amount.

> **BACKGROUND**
> iService pulls the Balance Due from the DMS, then it applies the surcharge if you're paying by credit card. For convenience some DMS setups automatically add the processing fee as a Misc. Charge *before payment*. This setup caused the default payment amount to include the processing fee twice.



What's new?
A new setting allows dealerships to flag if their DMS auto-loads a processing fee (and define how to identify it).

iService detects that fee in the DMS data and removes it when importing the balance due. When a credit card is used for payment, it adds the processing fee just like normal.

Why it matters

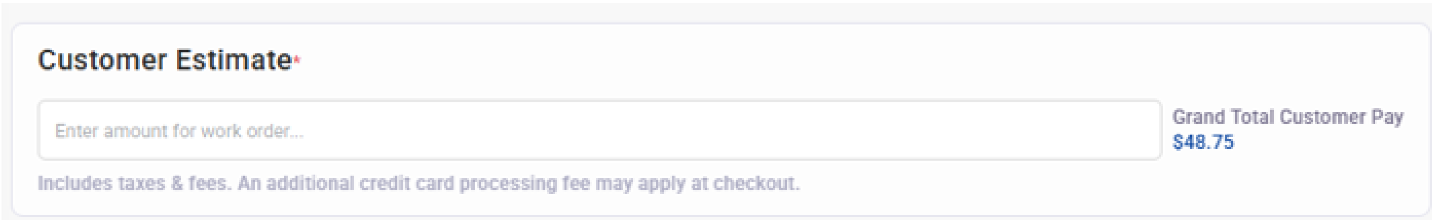
- Avoids double-collection of processing fees.
- Keeps accounting balanced so that receivables match distributions.

Mobile Check-in (Beta Release)

Initial Estimate

What's new

Mobile Check-In now supports writing back to **Lightyear's Estimate field** on the Work Order screen. This ensures the customer-facing estimate is recorded, printed on the work order, and aligned with the pricing expectation set at check-in.



The solution

Advisors can now:

- **See the grand total** of Customer Pay jobs (including tax, fees, discounts).
- **Enter a Customer Estimate** directly in Mobile Check-In.
- Write the value back to Lightyear when the RO is signed, so it appears on the signed work order.

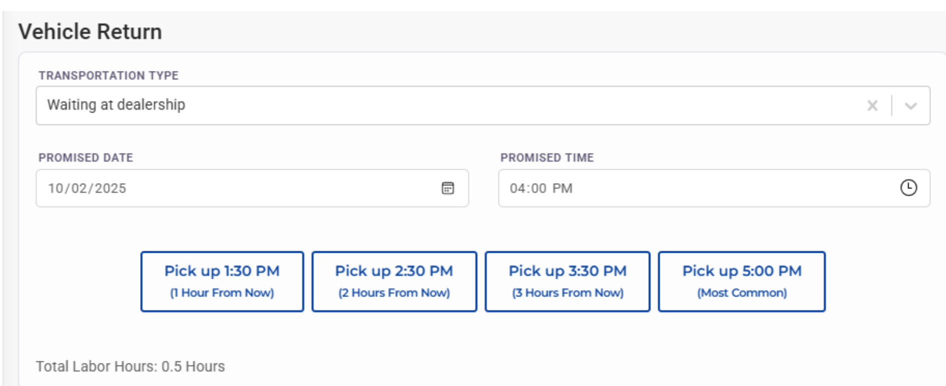
Why it matters

- Customers get a clear, written estimate at check-in.
- Dealerships stay compliant, consistent, and transparent.
- Advisors save time and reduce mental math, focusing more on the customer.

Promised Time

What's new

Promised Date & Time now write back at the end of check-in. The most common times are suggested and total labor hours are provided as a reference.



A new **Vehicle Return card** in check-in makes it quick and easy to set a return time:

- **Date defaults to today** for faster entry.
- **Smart shortcuts** let you pick from the most common times with one tap:
    - 1 hour from now
    - 2 hours from now
    - 3 hours from now
    - 5:00 PM
    - Or, type in any custom time you'd like.
- **Total Labor Hours** are displayed at the bottom to help guide your promise.
- The promised date & time write back to Lightyear once you sign the Repair Order.

Why it matters
Advisors can now set and track return times consistently, ensuring:

- Better alignment with customer expectations.
- Improved customer satisfaction scores.
- Compliance with OEM-mandated processes.

Draft ROs (Delay creation)

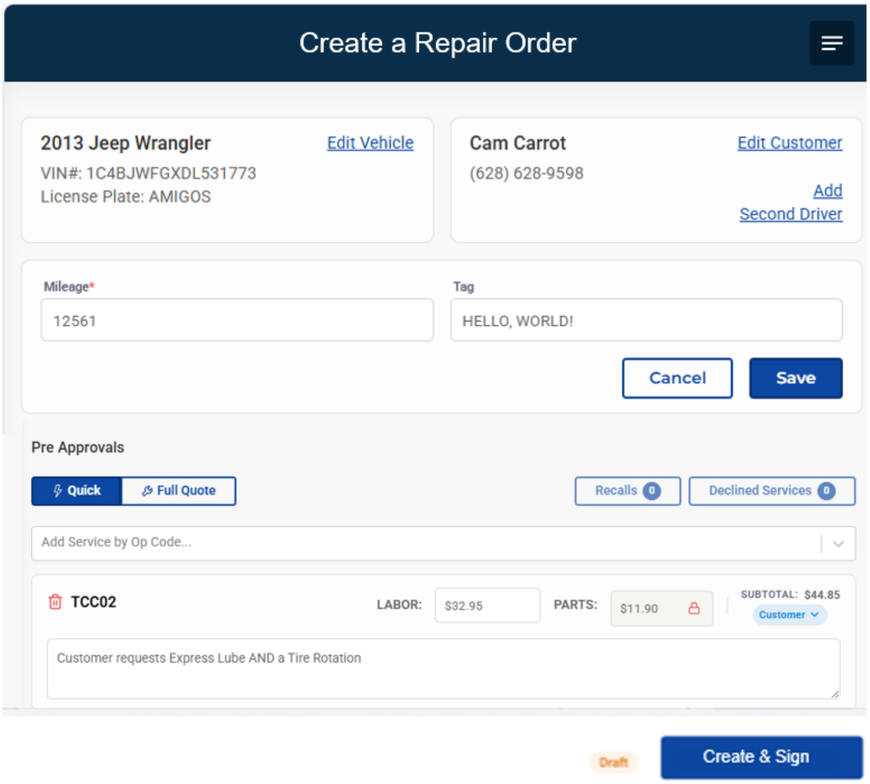
What's new
We've improved how Repair Orders (ROs) are handled during check-in to ensure OEM compliance and prevent costly warranty audit issues.

The problem
Previously, ROs were created immediately during check-in, but pre-approvals were timestamped later. This mismatch meant dealerships could fail OEM audits, risking reimbursement on warranty jobs.

The solution
ROs now stay in **Draft status** until the check-in process is complete. This ensures the timestamps for ROs and pre-approvals align, protecting your dealership during audits.

How it works

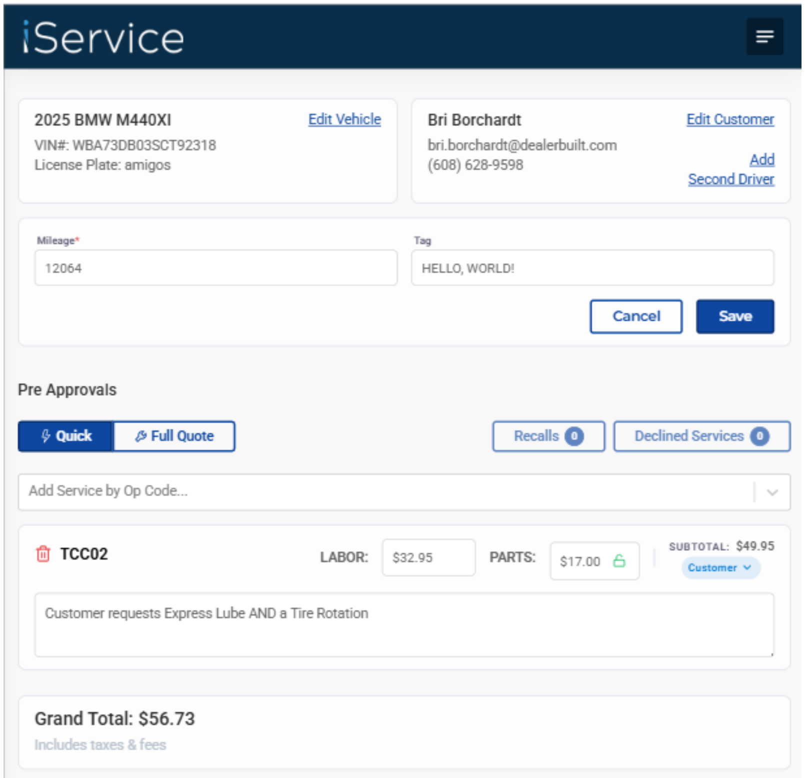
- When you check in an appointment, you'll go straight to the check-in page.
- The page header and sticky footer clearly show the RO is in **Draft**.
- Only when you tap **Create & Sign** does the RO write back to Lightyear, officially timestamping it and making it visible in iService.



Why it matters
This update ensures accurate timestamps that align with OEM requirements—helping dealerships stay compliant and safeguard warranty revenue.

UX Updates for Clarity & Speed

What's new
We've redesigned the check-in experience to make reviewing and editing customer and pre-approval details faster and more obvious.



The new design keeps everything at your fingertips:

- **Customer and vehicle details** are now editable right at the top of the page.
- **Pre-approvals** can be reviewed and adjusted inline — no more jumping into a pop-up.
- The most common quoting actions are shown immediately. Less common actions (like discounts) are still accessible with **Full Quote**, which opens the Quoting module.

Why it matters
Check-in is now faster, easier, and more intuitive — helping advisors stay focused on the customer instead of navigating screens.