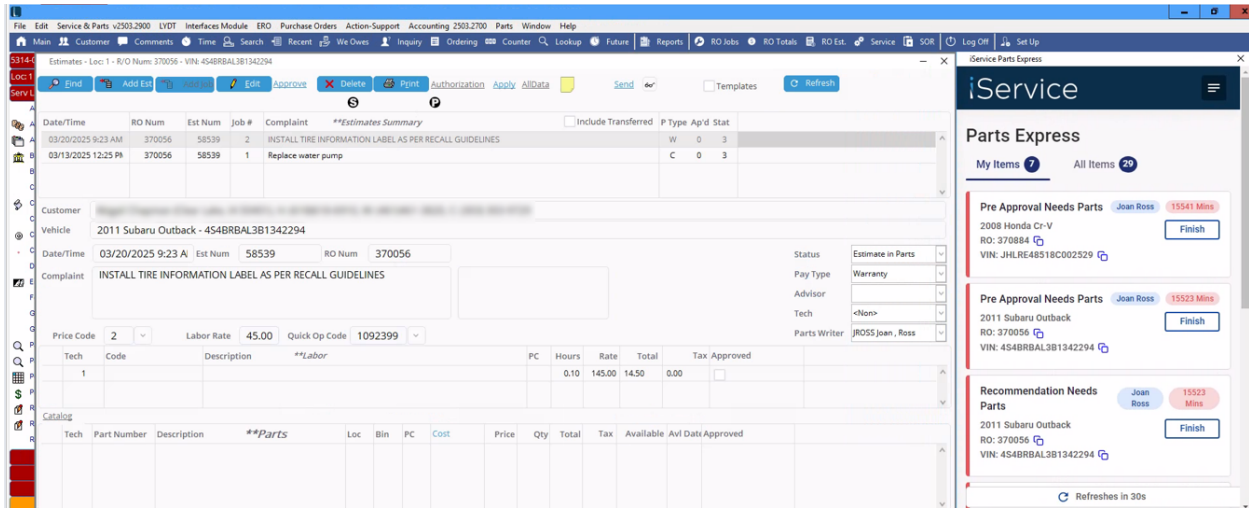


Parts Department's Quoting Task List

Overview

Lightyear's Parts Express window gives your parts team a fast, efficient way to manage quoting tasks — all from a single, auto-refreshing view inside the DMS. No more manual refreshing, no toggling between systems.



Requirements


Before getting started, make sure the following are in place:

- Access to **Lightyear's Enterprise Retail Cloud (ERC)**
- Lightyear's **app preference** set to your iService Subdomain. This should have been configured during your iService install.
- Parts agents need to use an **iService username** with the parts role and a valid DMS ID

Sending Tasks to Parts

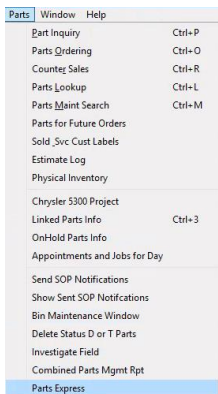
Advisors & Technicians can generate these quoting tasks for the parts department:

| Task | Trigger |
|--------------------------|-------------------|
| Pre-approval needs parts | Adds a task when: |

| | |
|----------------------|---|
| | <ul style="list-style-type: none"> Your repair order imports from Lightyear (checked-in via DMS) You click Create & Sign (checked-in via iService) <p>If parts doesn't need a task for this repair order, uncheck <i>Notify Parts</i> first.</p>  |
| Estimate needs parts | Adds a task when you click <i>Send to Parts</i> in the quoting module. |
| Approvals | <p>Adds a task when:</p> <ul style="list-style-type: none"> Customers approve an estimate through the Customer App Advisors record a verbal authorization in iService <p>Declines do not generate tasks.</p> |

Finding Tasks

Parts Express helps you manage quoting tasks and automates repetitive clicking.



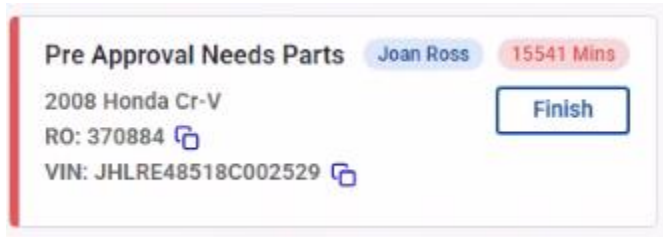
It's an iService window that lives inside of Lightyear, and to see it:

1. Login to ERC
2. Click the **Parts** button in the top navigation, then **Parts Express**
3. Log in with your **iService username**. You only need to do this once per day.

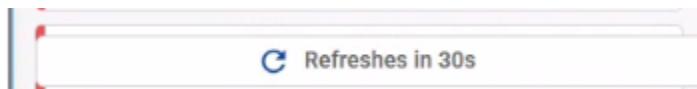
By default you'll land on the **My Tasks** tab. It hides tasks assigned to others, so you'll see:

- Tasks from Repair Orders assigned to you
- Tasks with no Parts Writer assigned yet (available to claim)

Tasks include a timer, so you'll see how long they've been waiting:



The list automatically refreshes every 30 seconds, with a countdown at the bottom.



Completing Tasks

When you click **Start** on a task, the system automatically:

1. **Assigns you as the Parts Writer** on both the iService RO and the Lightyear estimate.

Note: You will not be assigned on Lightyear's RO — this is intentional and related to commission tracking.

2. **Opens the appropriate Lightyear window** — either the Jobs window (for pre-approvals) or the Estimates window (for estimate tasks).
3. **Updates the estimate status** in Lightyear.


Parts Express remains open so you can easily copy the VIN or expand the card and see:


- **Technician notes**
- **Job numbers** for easy assignment and pushing parts to the estimate

Recommendation Needs

Parts

2011 Subaru Outback

RO: 370056 

VIN: 4S4BRBAL3B1342294 

Joan Ross

15525 Mins

Finish

- JOB #2: Replace water pump
 - Comments: Parts A, B, C...
- JOB #3: Install tire information label as per recall guidelines

Use your normal DMS tools to complete the task (like adding part number or transferring approvals). When your task is complete, tap **Finish** in Parts Express to automatically:

- Update the estimate status
- Pull the parts into iService (if relevant)
- Notify the advisor and/or technician
- Dismiss the task from your list

Note: unfinished tasks are also dismissed once the repair order is closed in iService.

Settings

If you prefer to handle pre-approval tasks outside of the system, you can remove them from Parts Express by:

- Logging into iService
- Going to Settings > Create a Quote
- Unchecking *Notify Parts on All Pre-approvals*. Don't forget to save!

The screenshot shows the iService Settings page for the 'Create A Quote' feature. The left sidebar contains navigation options: Advisor, Digital Route Sheet, Technician, Parts, Parts Express, Reconditioning, Management, and Reporting. The main settings area lists various categories: General, Outgoing Messages, iService App, Customer App, Waiver, MPI Templates, Op Codes, Create A Quote (highlighted), and Discounts and Charges. The 'Create A Quote' settings are displayed in a form with two input fields: 'Supplies Minimum' set to 0 and 'Supplies Maximum' set to 1. Below these fields is a section titled 'Parts Express: Pre-approval Settings' with two checked checkboxes: 'Include on Picklist' and 'Notify Parts on All Pre-approvals'.

Tips

- **Color alerts are your friend** — glance at the task list regularly to catch tasks turning yellow (5 minutes) or red (10 minutes) before they exceed response time expectations.
- **Managers** can use the All Tasks tab to monitor workload distribution and step in on unclaimed tasks.
- Parts Express **auto-refreshes**, so there's no need to manually reload the page. A timer at the bottom counts down to the next refresh.
- If two Parts Agents try to start the same task at the same time, one will get a warning that it's already assigned.