

Disabling the Quote Integration Setting

Best Practice Guide • iService Integration

Overview

iService includes a key setting under **Settings > Create a Quote** that controls how labor details are written back to the Repair Order (RO). Understanding this setting — and when to disable it — can significantly improve your integration accuracy.

How the Setting Works

When the Setting is Enabled

iService automatically inserts a new job line into the RO the moment an estimate is approved. When the Parts Department later transfers the estimate (with parts) to the RO, they update this automatically inserted job line. Labor details are pushed directly to the Repair Order — not to the estimate — to prevent duplicates after the parts transfer merges the estimate.

When the Setting is Disabled

The Parts Department is responsible for manually inserting the new job line. iService pushes labor details to the estimate rather than directly to the Repair Order. This approach offers deeper price code integration, resulting in more reliable labor detail transfer.

Recommendation

We recommend disabling this setting for most Service Lanes. Disabling it provides the following benefits:

- Avoids duplicate job lines for DIAGs
- Improves labor accuracy for certain price codes
- Parts can see labor details directly on the DMS Estimate

How to Make the Change

This is a quick configuration change, but we strongly recommend briefing your Parts Department beforehand to avoid confusion during the transition.

Step 1: Brief Your Parts Department

Once this setting is disabled, job lines will no longer appear on the RO automatically when an approval comes through. When the Parts team transfers an approved estimate line to the RO, they should follow these actions based on line type:

Parts Team: Actions After Disabling the Setting

- **New add-on job line** → Select **Insert** (*most common*)
- **Updating an existing line** (e.g. a pre-approved diagnostic) → Select **Update**

Note: *Insert is the most common action. Update applies only to lines that were already on the RO before approval — such as a diagnostic op code written up at check-in that is now being updated with findings and labor.*

Step 2: Update the Setting in iService

Once your Parts team is informed and ready, follow these steps:

1. Go to **iService > Settings > Create a Quote**
2. Uncheck: *Upon approval, insert an estimate AND an RO job*
3. Click **Save**

⚠ Important: This change applies to new approvals only, going forward. Estimates already in progress before the change are not affected.

For assistance, please contact your DealerBuilt support representative.

