

Mitchell1 and ShopKey ProSpect

User Guide

Index

| | |
|--|----|
| Requirements..... | 1 |
| Downloading ProSpect..... | 1 |
| ProSpect Setup..... | 2 |
| How to Add a Customer..... | 13 |
| How to Add a Vehicle to a Customer..... | 17 |
| How to Look Up a Customer | 19 |
| How to Create an Estimate | 21 |
| How to Scan a VIN Barcode or License Plate | 24 |
| Viewing Existing Orders | 28 |
| Creating Inspection Templates | 30 |
| Adding an Inspection to an Order..... | 33 |
| Printing Inspections from SE | 36 |
| The Schedule..... | 37 |

Requirements

General

- Wireless Local Area Network (WLAN same as HOST computer)
 - Minimum: 802.11n
 - Recommended: 802.11ac or higher
- Manager SE version 8.0.0 or higher
 - For Manager SE system requirements, see our [Knowledgebase Article](#)

Apple Devices

- iOS 12 or higher
 - For a list of iOS 12 compatible devices, see [Apple's Official Page for iOS12](#)
- Ability to download and install apps from the App Store

Android Devices

- Android 5.0 Lollipop or higher
 - For a guide on how to check your Android OS version, see [Google's Official Site](#)
- Ability to download and install apps from the Play Store
- Camera for full License Plate OCR and VIN Barcode Decoder functionality

Downloading ProSpect

On your mobile device, download M1-SK ProSpect from either the App Store or the Play Store

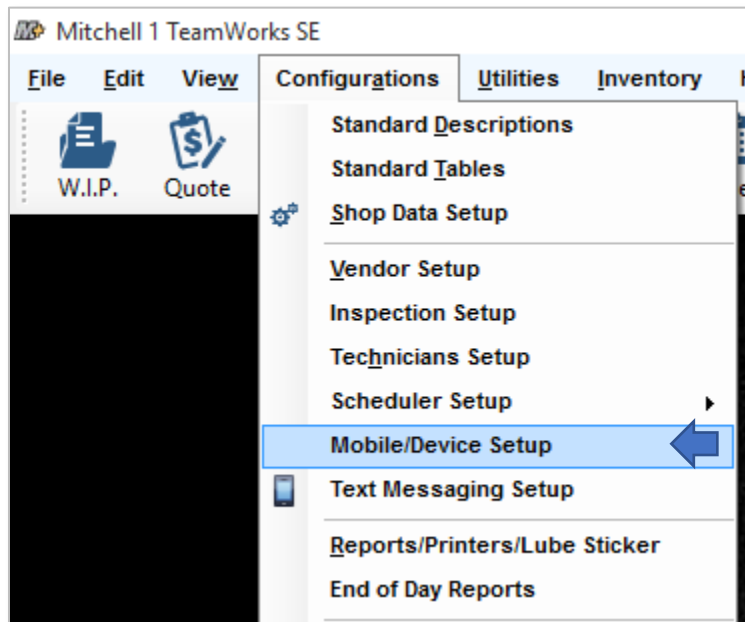


ProSpect Setup



Ensure the mobile device is connected to the same network as the host computer. Although not required, it is highly recommended that the shop's host computer be set up with a static network IP address to reduce possible connectivity issues. **Please consult your local IT professional for instructions on how to set up a static IP at your shop.**

1. Open Manager SE. In the upper left, open the **Configurations** menu then select **Mobile/Device Setup**.



2. Enter the authorization credentials. They are the same credentials as **ProDemand/ShopKeyPro**.

Authentication Required

ProDemand / ShopkeyPro Shop Account Credentials

[Need Help? Click Here.](#)

Login Cancel

3. Once authorized, the **General Settings** page will open. There will be a randomly generated password in the **Device Access Control** area, which can be changed in this screen.

The default **Port Number** is 9000. The **Connection** should auto populate. If it does not, enter **http://** then the **IP Address** of the host computer, followed by the **Port Number**. Format: `http://192.168.0.5:9000`

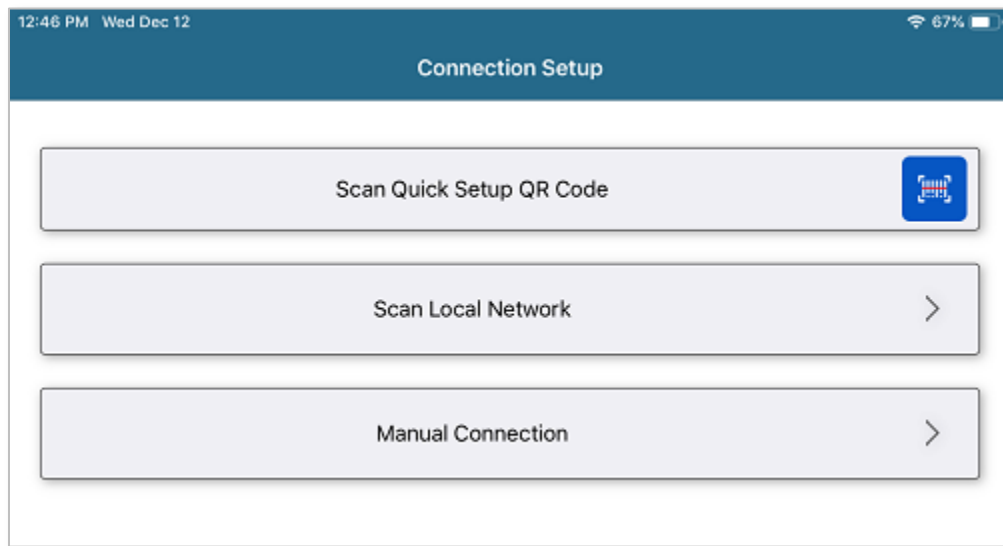
The screenshot shows the 'Mobile Configuration & Setup' window. On the left is a sidebar with 'Online Help', 'Sign Out', 'General' (selected), and 'ProSpect App Authorization'. The main area is titled 'General Settings' and contains three sections: 'Device Access Control' with an 'Access Password' field containing 'test'; 'Service Settings' with a 'Port Number (Default 9000)' dropdown set to '9000'; and 'Mobile Setup Connection' with a warning icon and the text 'Use URL below to configure Greeter App'. Below this is a 'Mobile Setup Connection' section with a text field containing 'http://172.21.48.84:9000'. At the bottom right are 'Save Changes' and 'Undo Changes' buttons.

4. Next, open the **ProSpect App Authorization** section.

The screenshot shows the 'Mobile Configuration & Setup' window with the 'ProSpect App Authorization' section selected in the sidebar. The main area has a title 'ProSpect App Authorization' and a warning icon with the text: 'Only **Authorized** devices are allowed to communicate with your Database. By default, newly connected devices are not authorized. **Important:** Prevent unauthorized access by only authorizing devices you control. You can permanently remove/unauthorize a device by clicking the 'X' button in bottom navigation box - this will delete the entry. A device can be added back by reconnecting it again and reauthoring it in the future.' Below this is a table with the following columns: 'Device Name', 'Identifier', 'Date Added', and 'Authorized'. The table is currently empty. At the bottom left of the table area, it says 'Device 0 of 0'.

5. Download and install **M1-SK ProSpect** from the **Google Play Store/Apple App Store** appropriate for your mobile device. Ensure the mobile device is connected to the *same network* as the host computer.

6. When loading ProSpect for the first time, the **Connection Setup** screen will display.



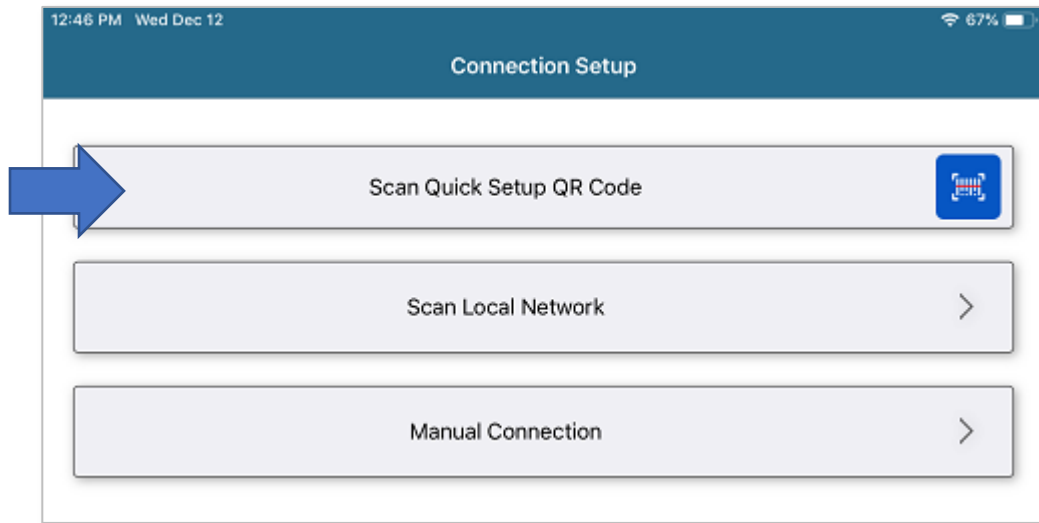
There are three ways of connecting ProSpect to Manager SE. The **Scan Quick Setup QR Code** option involves scanning a QR code from the Manager SE host, **Scan Local Network** will scan the local WI-FI network for a host, while **Manual Connection** involves manual entry of all parameters.

Note: Password

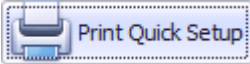
Both **Scan Local Network** and **Manual Connection** require a password. This password can be set in **Mobile/Device Setup**, under Configurations in Manager SE. The password has no requirements.

Scan Quick Setup QR Code

1. On the mobile device, tap **Scan Quick Setup QR Code** from the Connection Setup menu.

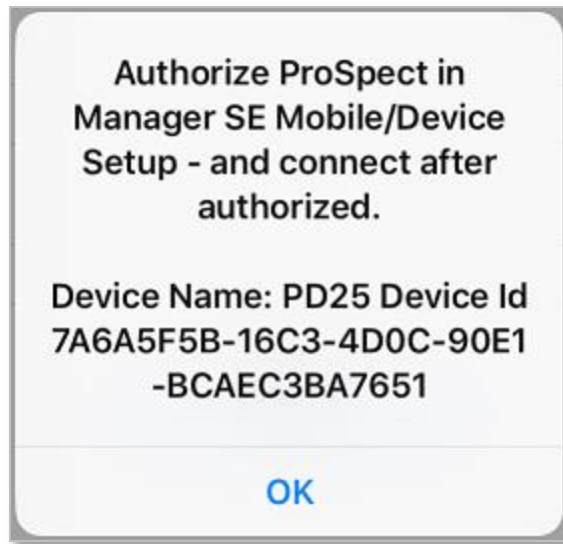


2. On the host computer, go to Configurations **then Mobile/Device Setup**. Once there, select the General tab.

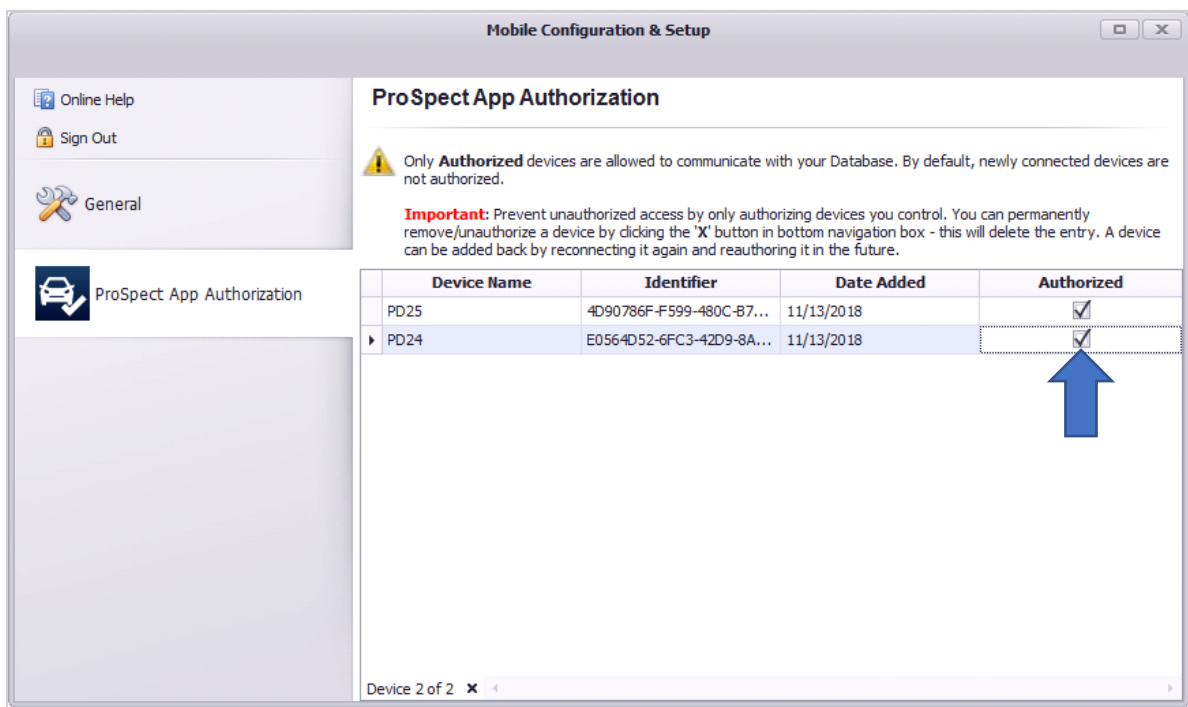
3. At the bottom, click  to display the QR code.



4. Scan the QR code with the mobile device. When detected, a green square will appear around the QR code on the mobile device. Once it is scanned, the fields will be populated with the correct information. Then tap **Connect**.
5. If successful, the **Device Not Authorized** message will display.

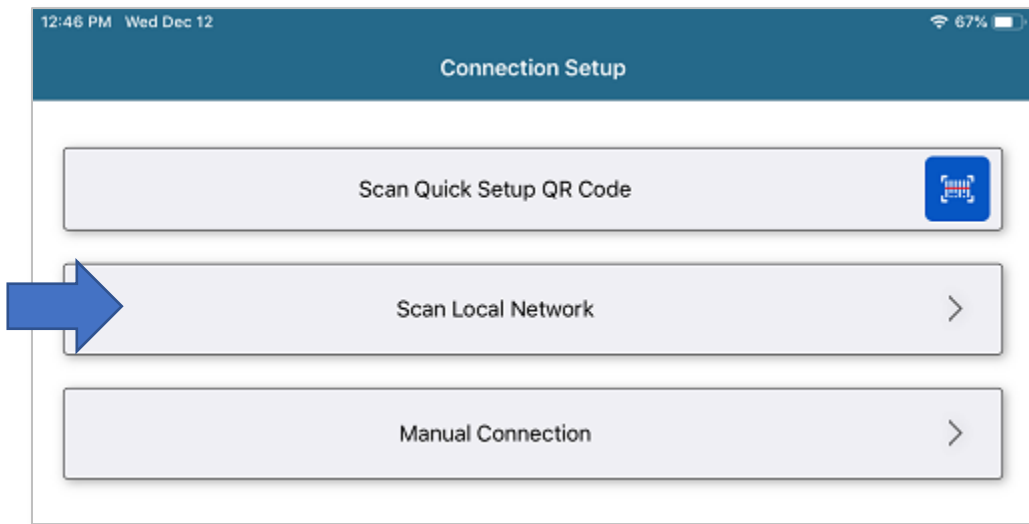


6. In Manager SE, authorize the mobile device in the **ProSpect App Authorization** section of **Mobile/Device Setup**

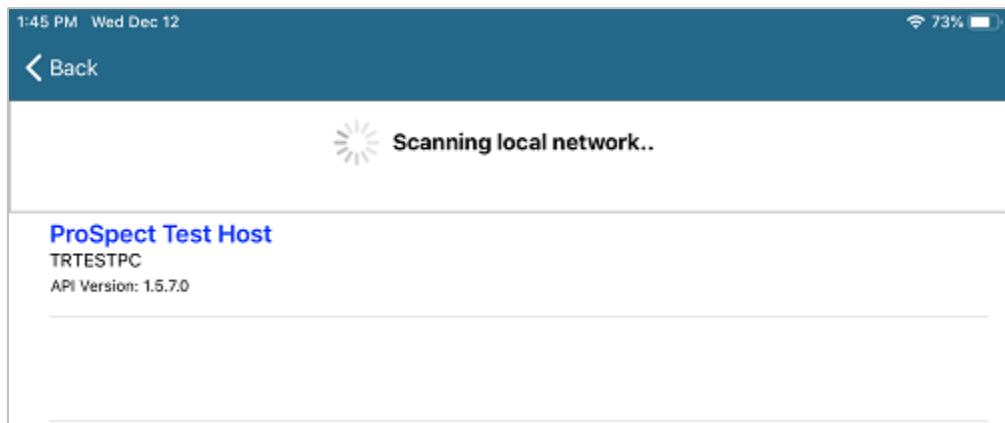


Scan Local Network

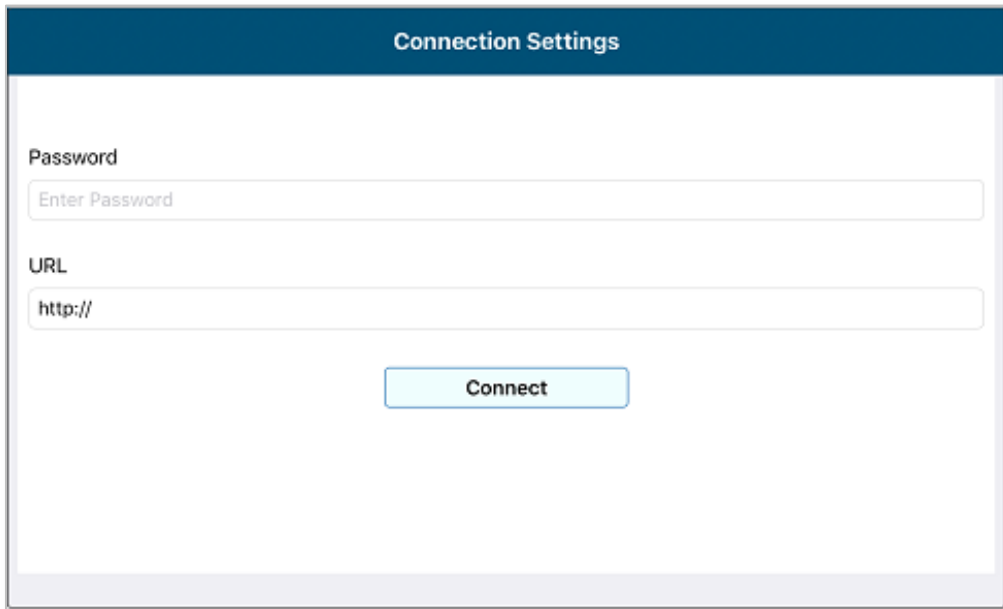
1. On the mobile device, tap **Scan Local Network** from the Connection Setup menu.



2. Tap the shop name. It will appear, with the PC name and API version below, like so:

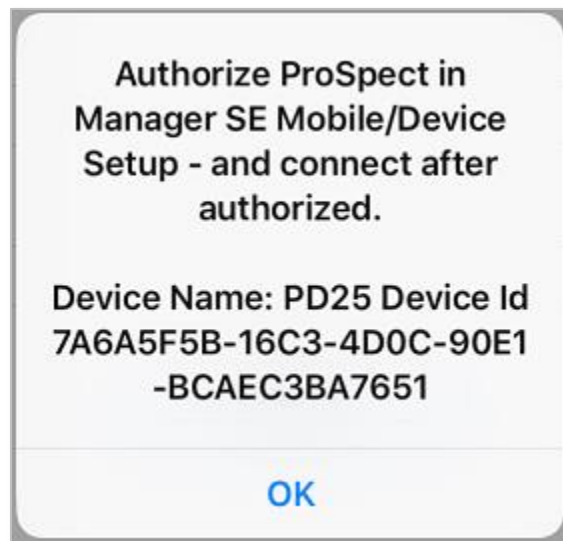


3. On the next screen, enter the password from the **Mobile\Device Setup** screen.

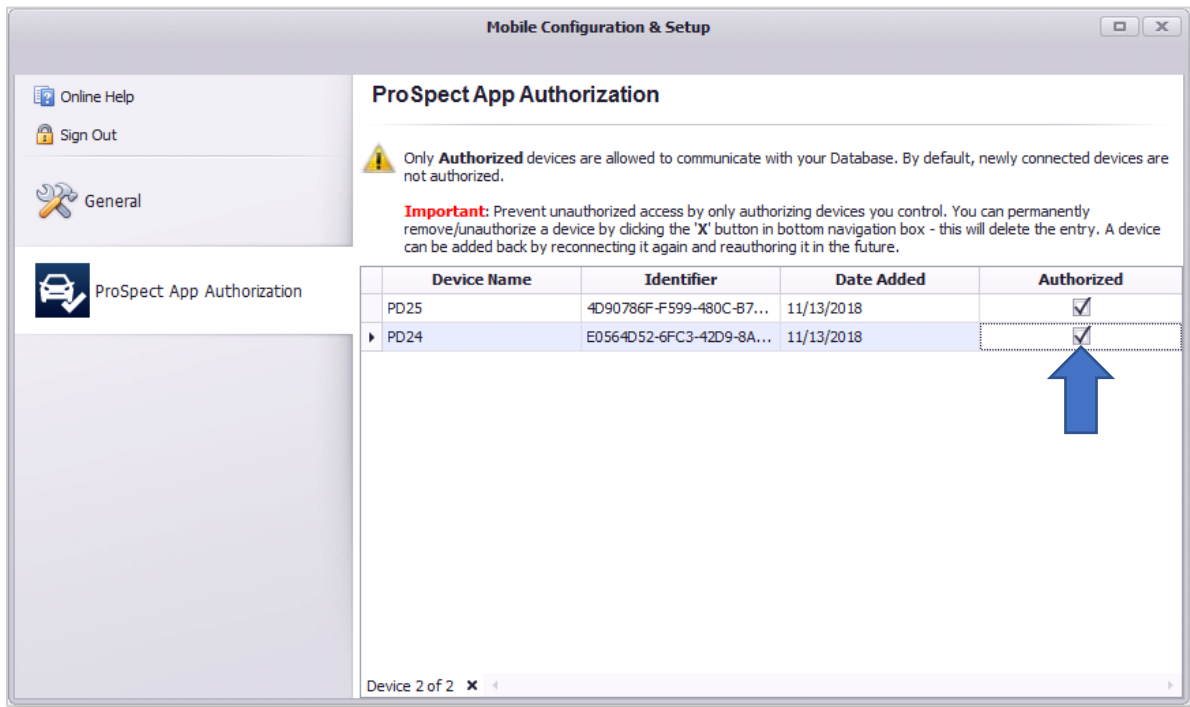


The image shows a 'Connection Settings' dialog box with a dark blue header. It contains two input fields: 'Password' with a placeholder 'Enter Password' and 'URL' with a placeholder 'http://'. A light blue 'Connect' button is centered below the fields.

4. If successful, the **Device Not Authorized** message will display.

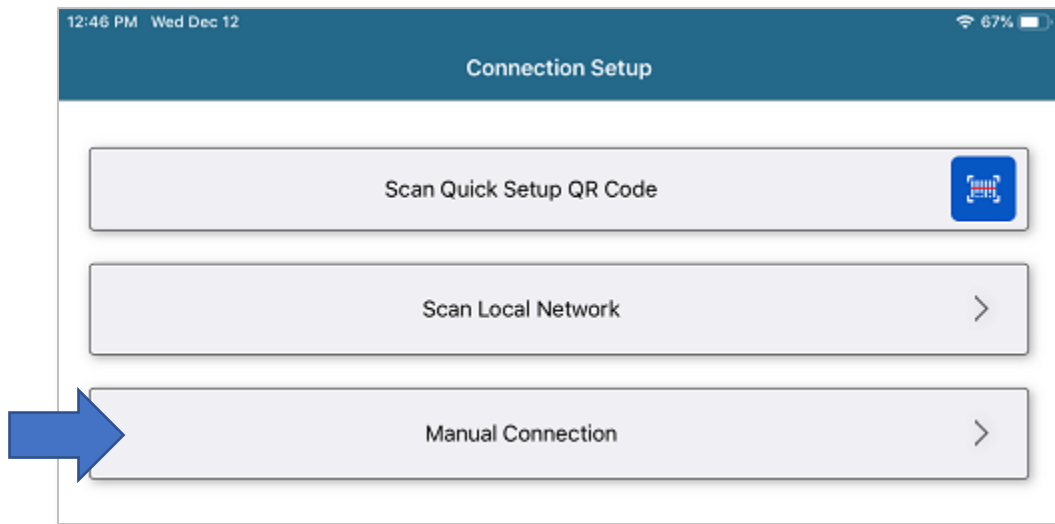


5. In Manager SE, authorize the device in the **ProSpect App Authorization** section of **Mobile/Device Setup**.



Manual Connection

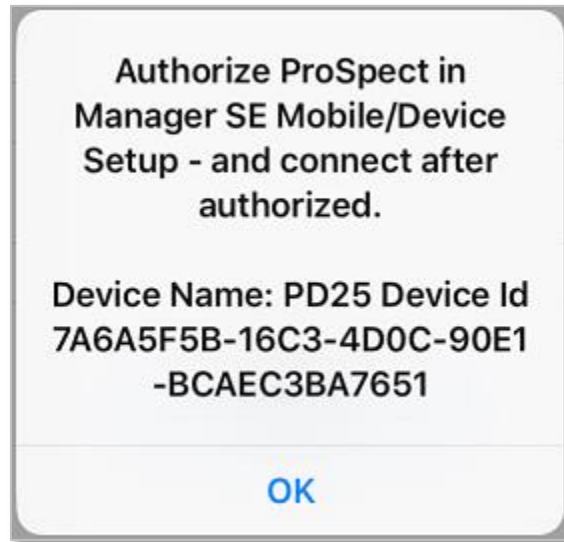
1. On the mobile device, tap **Manual Connection** from the Connection Setup menu.



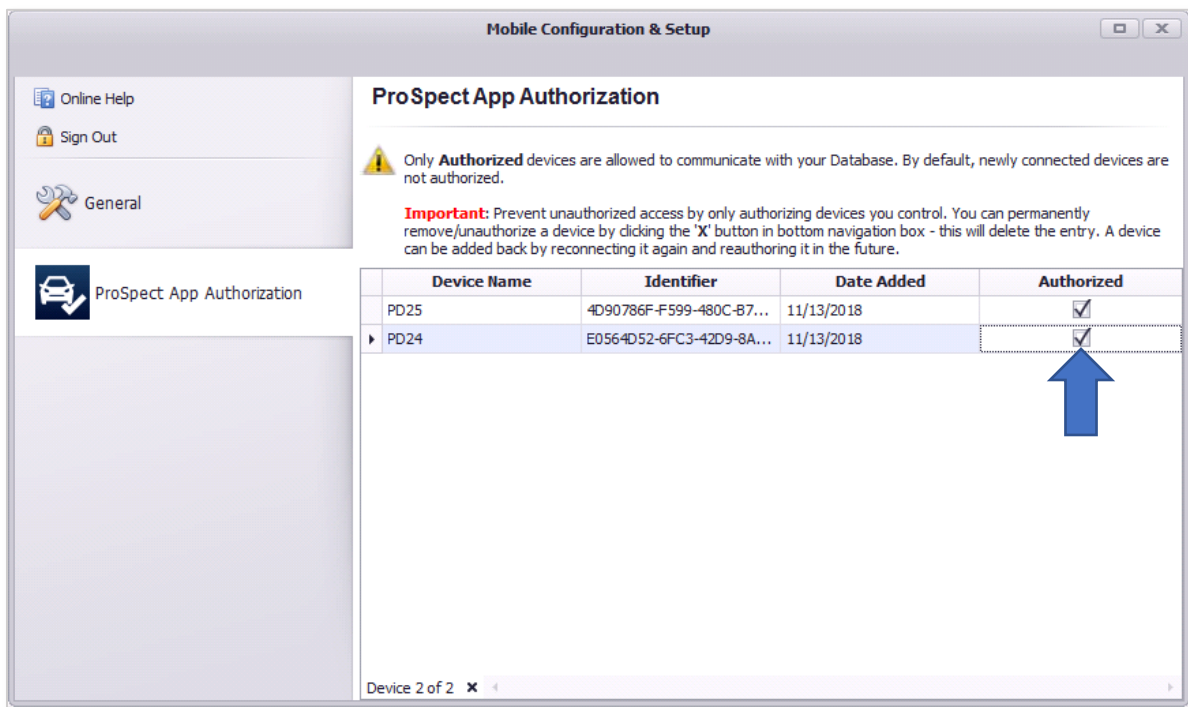
2. The **Password** must match the one in step the **Mobile/Device Setup** screen in Manager SE. The **URL** must match the *full URL* located on the same screen (including the "http://").

A screenshot of a mobile application's 'Connection Settings' screen. The screen has a dark blue header with the title 'Connection Settings'. Below the header are two text input fields. The first field is labeled 'Password' and contains the placeholder text 'Enter Password'. The second field is labeled 'URL' and contains the text 'http://'. Below the input fields is a light blue button with the text 'Connect'.

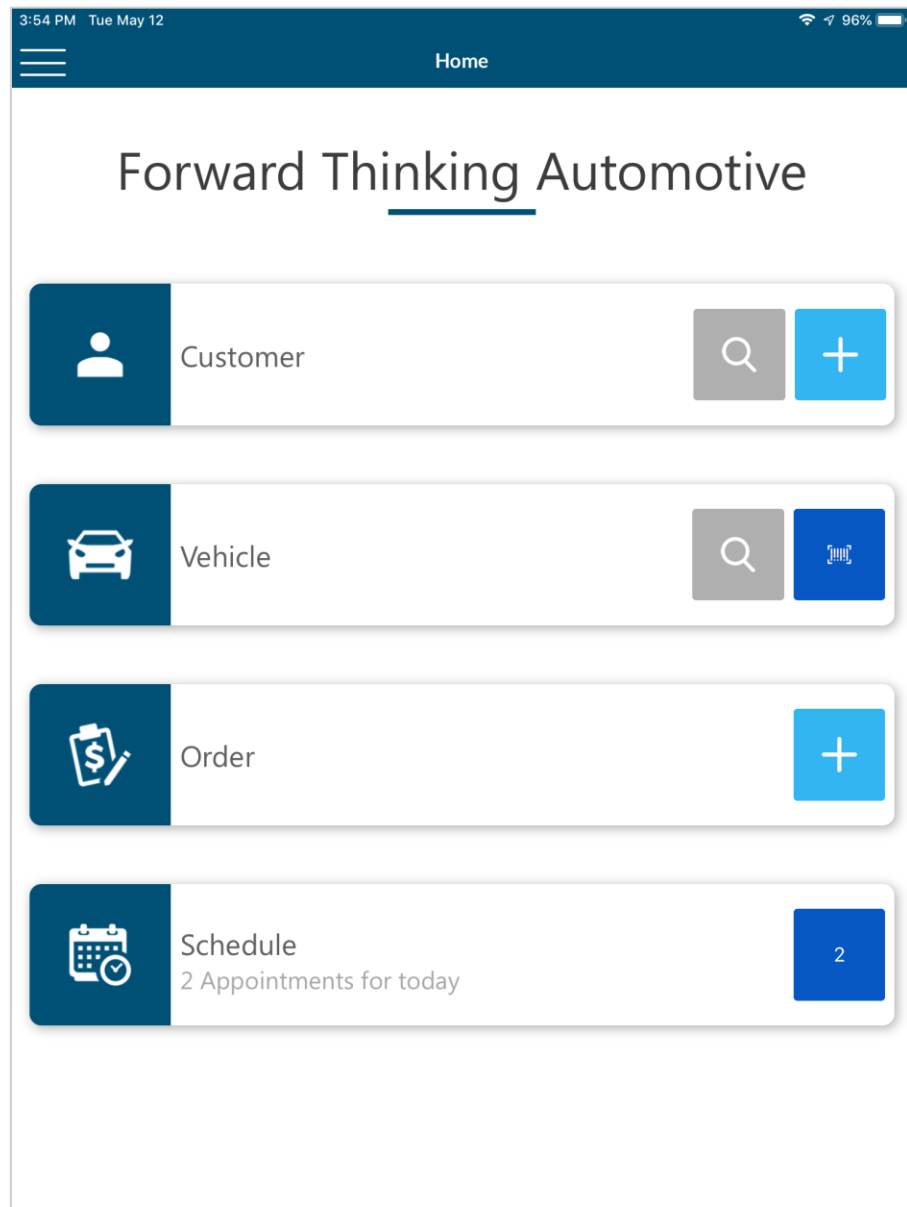
6. After tapping **Submit**, if successful, the **Device Not Authorized** message will display.



7. In Manager SE, authorize the device in the **ProSpect App Authorization** section of **Mobile/Device Setup**



After any setup is complete, the **Home Screen** will display.



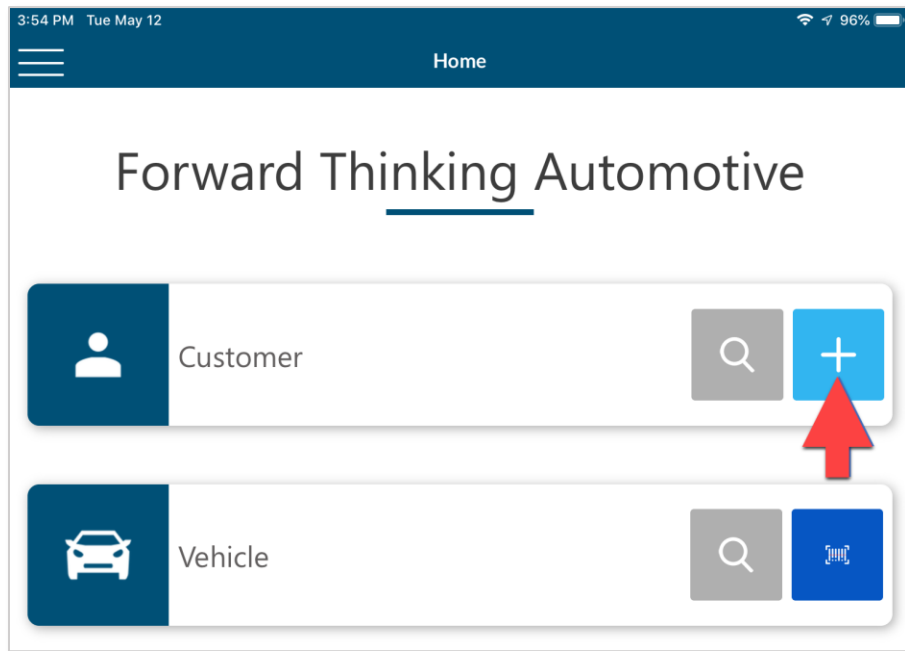
How to Add a Customer

Method 1: **Using the License/VIN Decoder**

See [How to Scan a VIN Barcode or License](#)

Method 2: The **Home Screen**

1. Tap the **+ Button** on the customer tab.



2. Enter customer information.

A screenshot of a mobile application's "Create Customer" form. The form is displayed on a white background with a dark blue header bar. The header bar contains a back arrow on the left, the text "Create Customer" in the center, and a "Save" button on the right. The form fields are as follows: "First Name" (single line), "Last Name" (single line), "Spouse" (single line), "Company" (single line), "add phone" (a green plus icon followed by the text "add phone"), "Email" (a label "Email" followed by a single line input field), "Address" (a label "Address" followed by a single line input field), "Zip Code" (a single line input field), "State" (a single line input field), and "City" (a single line input field).

3. Tap **Save** when all information is entered.

4:00 PM Tue Oct 30

Create Customer

Save

First Name

Last Name

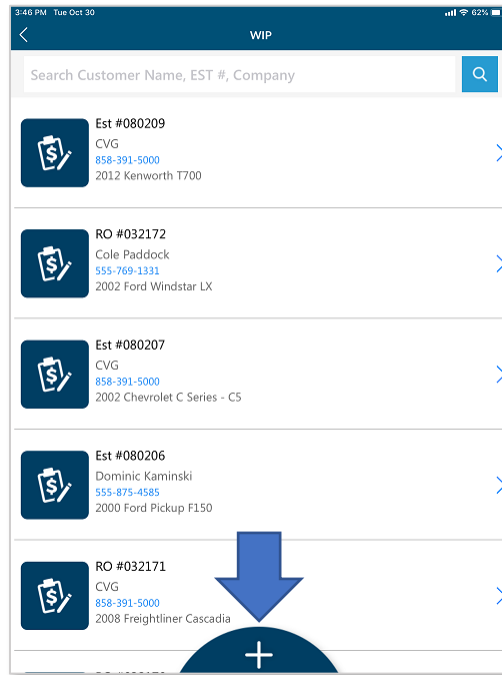
Spouse

Company

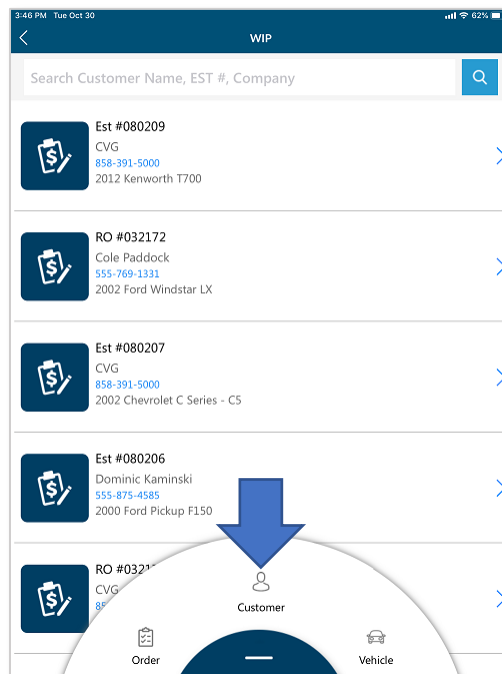
+ add phone

Method 2: The WIP Screen

1. Tap the **+** Button at the bottom of the **WIP** Screen.



2. Tap **Customer**.



3. Enter customer information.

4:00 PM Tue Oct 30

Create Customer

Save

First Name

Last Name

Spouse

Company

+ add phone

Email Email

Address

Address Zip Code State

City

4. Tap **Save** when finished.

4:00 PM Tue Oct 30

Create Customer

Save

First Name

Last Name

Spouse

Company

+ add phone

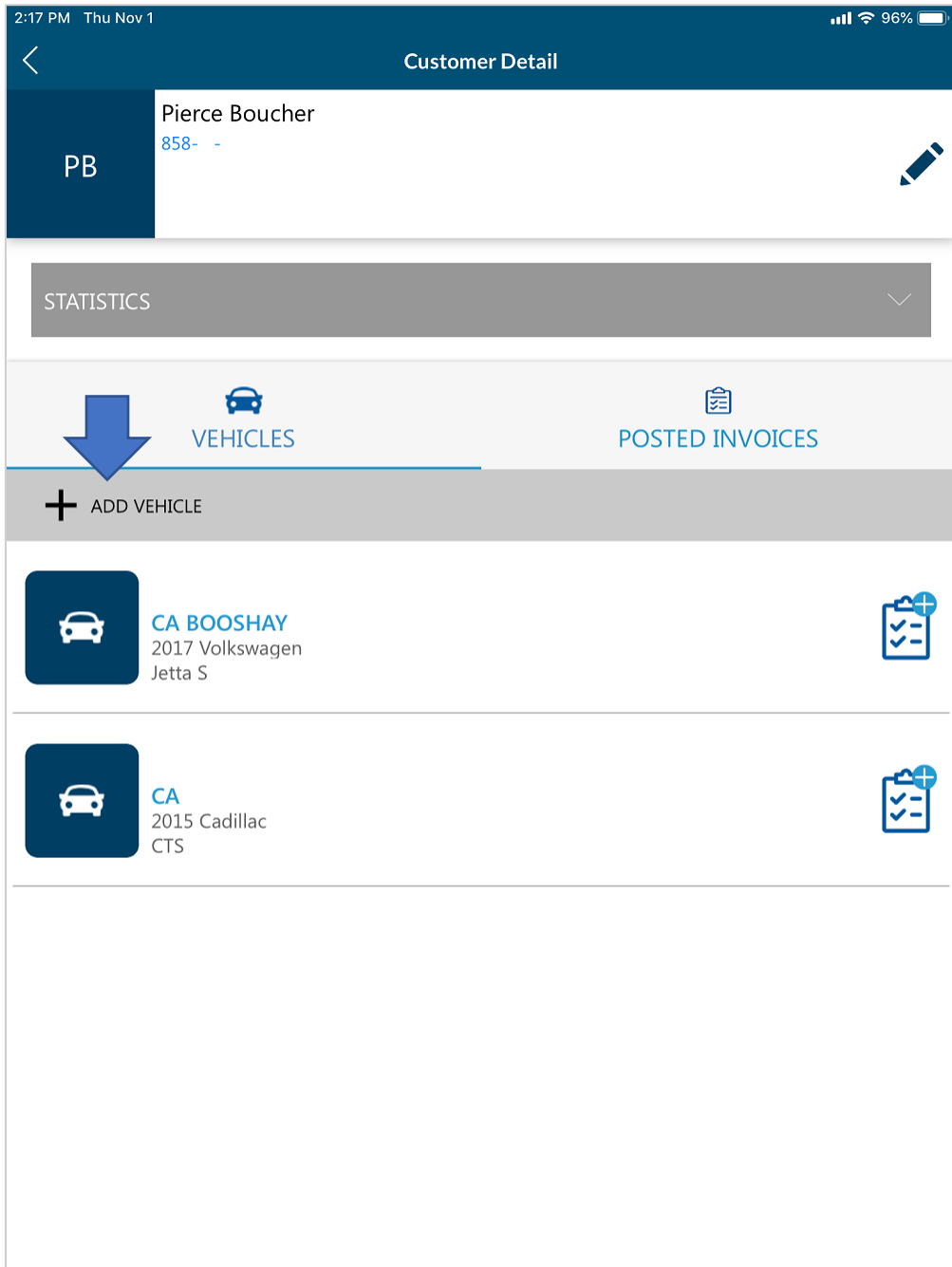
How to Add a Vehicle to a Customer

Method 1: Using the License/VIN Decoder

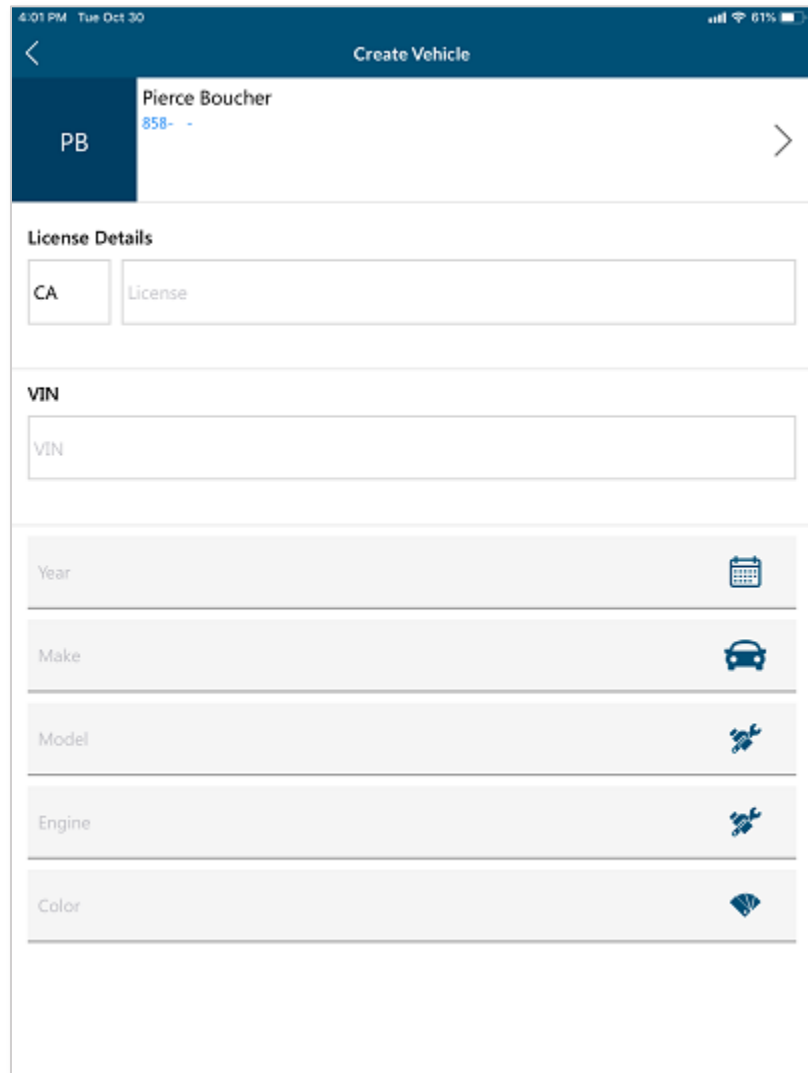
See [How to Scan a VIN Barcode or License](#)

Method 2: Customer Detail

1. Open the **Customer Detail** screen.
2. Tap **[+] Add Vehicle**.



3. On the **Create Vehicle Screen**, enter the **VIN** or **license plate** to be decoded, or manually select the vehicle information.
 - a. NOTE: The **License –OCR** or **VIN –barcode** decoder must be used from the **Home screen**.



4:01 PM Tue Oct 30

Create Vehicle

PB Pierce Boucher
858- -

License Details

CA License

VIN

VIN

Year

Make

Model

Engine


Color

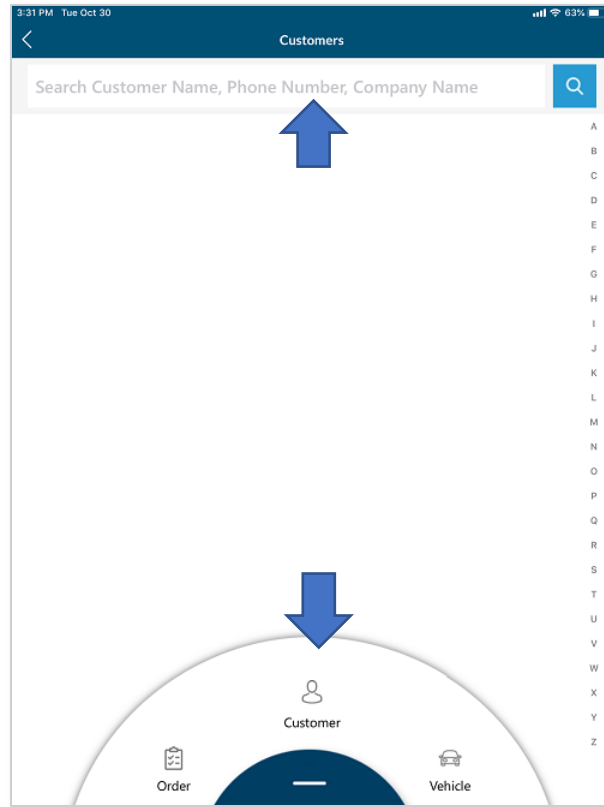
How to Look Up a Customer

Method 1: Using the License/VIN Decoder

See [How to Scan a VIN Barcode or License](#)

Method 2: Customers Screen

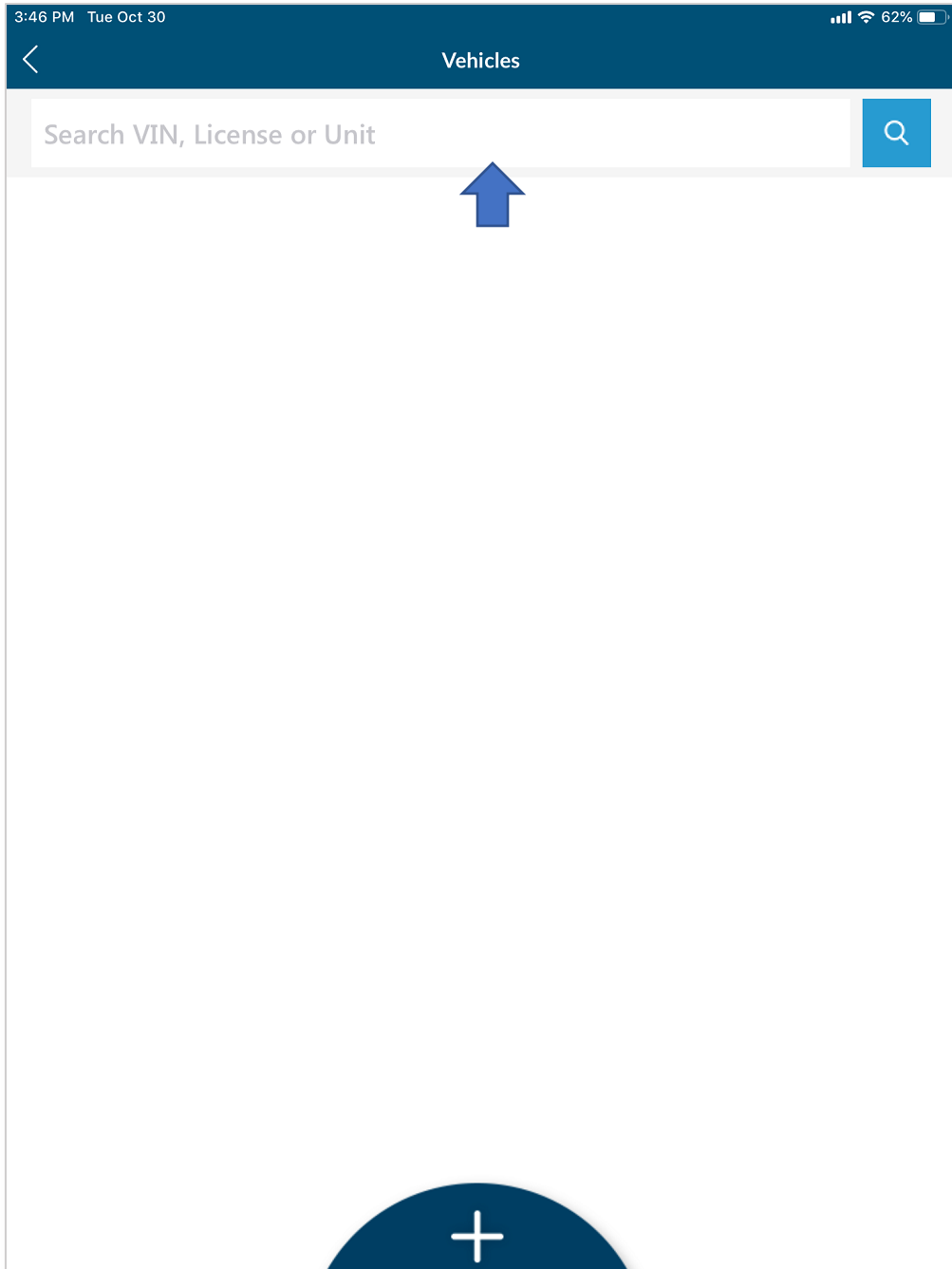
1. Tap the customer icon  on the **Home** screen.
2. Tap **Customer** in the **+ Menu** or search for them in the **Search Box**.



3. Select a customer. This opens the **Customer Detail** screen, ProSpect's version of the Customer Screen.



Method 3: Vehicles Screen

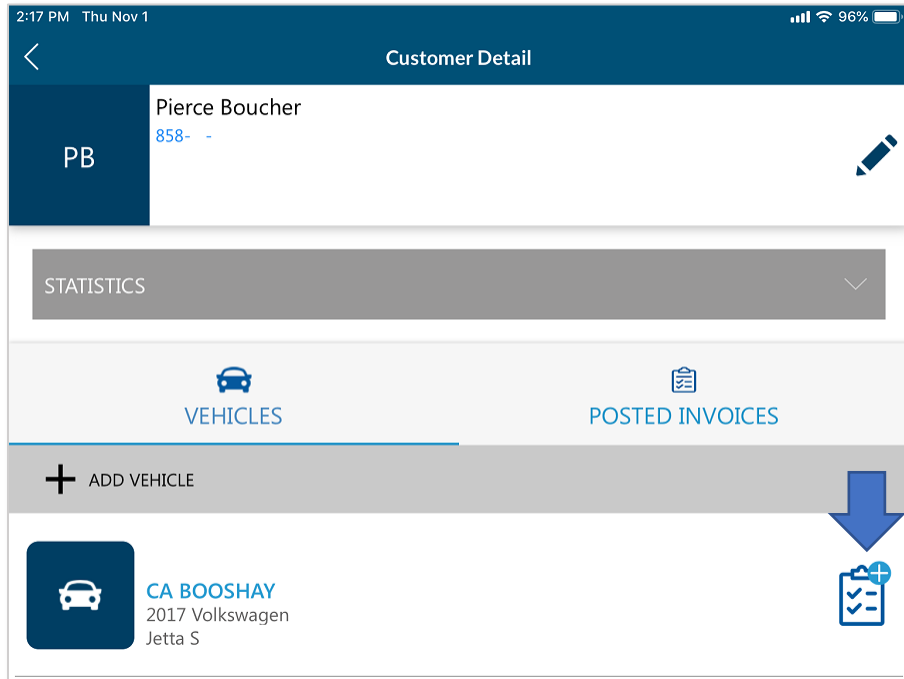
1. Tap the vehicle icon  on the **Home** screen.
2. Search by **VIN**, **License Plate**, or **Unit number**.



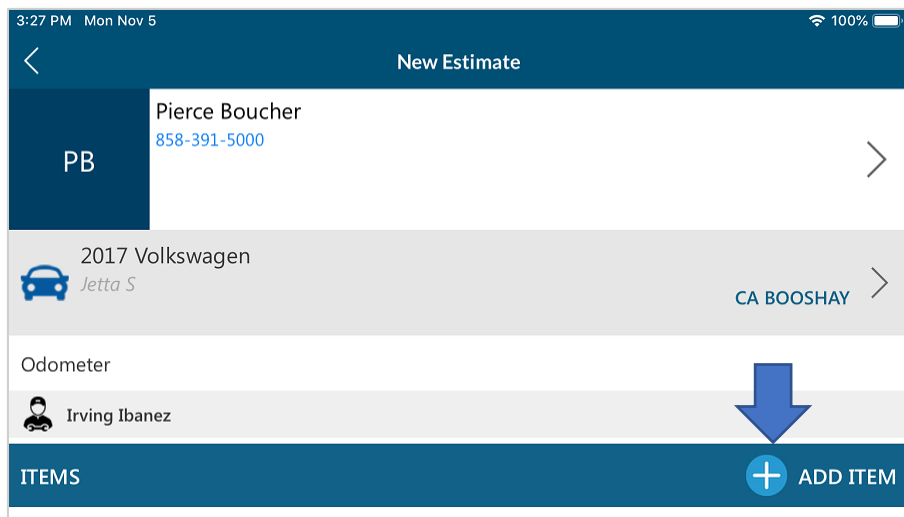
3. This opens the **Customer Detail** screen.

How to Create an Estimate

1. Select a customer; this will open the **Customer Detail** screen.
2. To start an **Estimate** for a vehicle, tap the **blue clipboard**  beside it.
 - a. If any orders already exist for that vehicle, a number will display on the clipboard icon,  and a prompt will show to select an existing order or create a new order.



3. Tap **+ ADD ITEM** to add a new item.



4. Now **MPI (Multi Point Inspection)** or **Canned Jobs** can be added to the new Estimate.
 - a. To add a **Canned Job**, tap Canned Jobs and select from the drawer.
 - b. To add an **MPI**, tap MPI and select from the drawer.

2:09 PM Thu Nov 1

<

New Es

Cancel

PB

Pierce Boucher

858- -

2017 Volkswagen

Jetta S

Odometer

Ann Gray

ITEMS

MPI

MPI-Sample #1

MPI-Sample #2

MPI-Sample #3

MPI-Sample #4

MPI-Sample #5

Canned Jobs

5. Add mileage and select technician.

The screenshot displays a software interface with a table. The table has two visible columns: 'ITEMS' and 'MPI-Sample #5'. A small dropdown menu is open above the table, showing the value '15000' and a 'Select Technician' option with a downward arrow. Below this, a modal dialog titled 'Select Technician' is open. The modal has a dark blue header with a close button (X). The list of technicians includes 'Irving Ibanez', 'SELECT PLEASE', 'Rich Redeker', and 'Ricardo Riddell'.

| ITEMS | MPI-Sample #5 |
|-------|---------------|
| | late 1 |

15000

Select Technician

Select Technician

Irving Ibanez

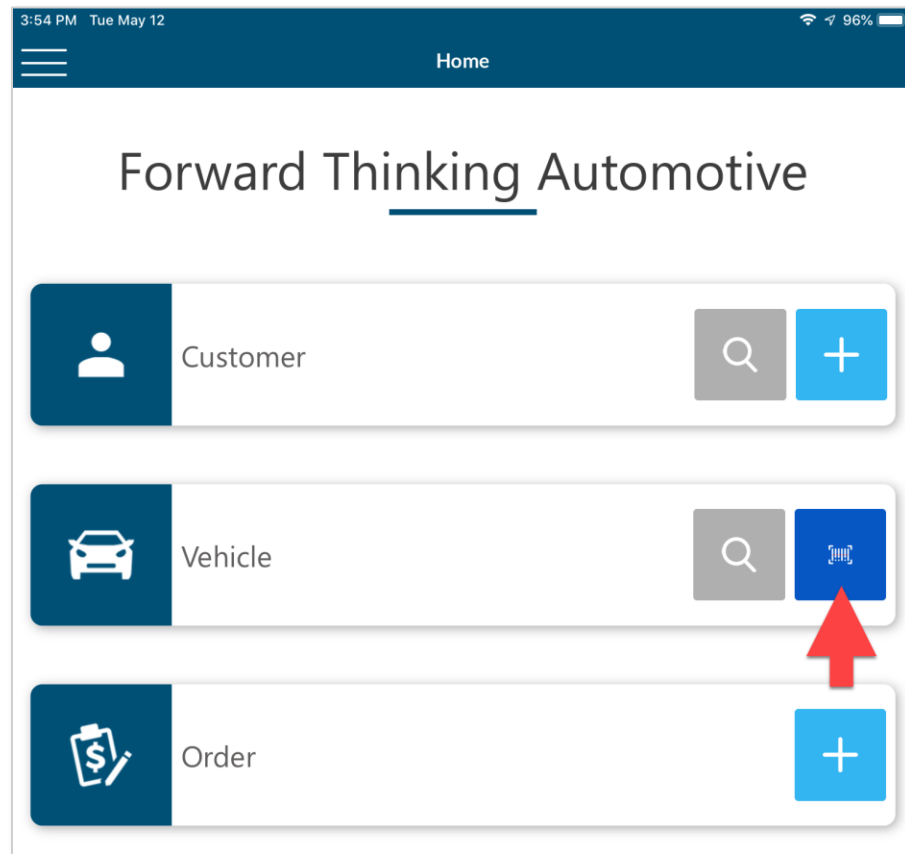
SELECT PLEASE

Rich Redeker

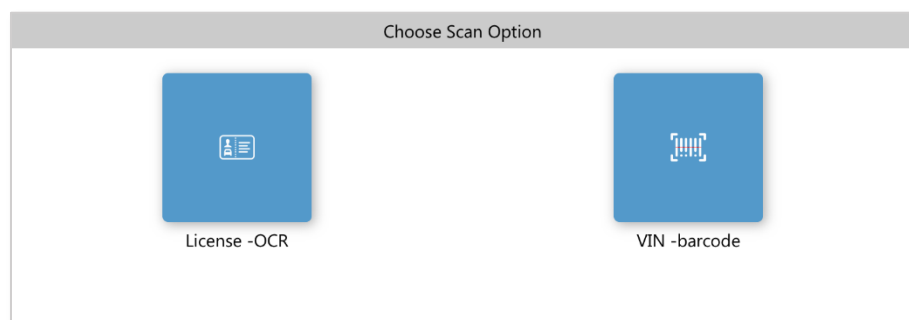
Ricardo Riddell

How to Scan a VIN Barcode or License Plate

1. From the **Home** screen, tap the **Scanner Icon** on the vehicle section tab.



2. Choose either **License -OCR** or **VIN -barcode**, depending which is available to scan.
 - a. Both areas follow the same general process, but screenshots of each area are included.






License Plate

1. Choose **License –OCR** from the prompt.
2. Make sure the whole license plate is clearly within the brackets. **The plate must be well lit.** Press the camera shutter button at the bottom of the screen.



3. The system will search for the plate. If there are multiple results, ProSpect will display them like so:

| SCAN OPTION | | 7AFT127 | TRY AGAIN |
|---|---------|---------|-----------|
| We found multiple probable matches, please select one to proceed. | | | |
| State | CA | | |
|  | 7AFT127 | 90.78 % | |
|  | 7AT127 | 77.35 % | |
|  | 7AET127 | 77.21 % | |
| TRY AGAIN | | DONE | |

4. The prompt from step 4 will not always show, and requires either making a selection or rescanning the license plate. Once it has been selected, the system will then look to see if that car already exists in the database.



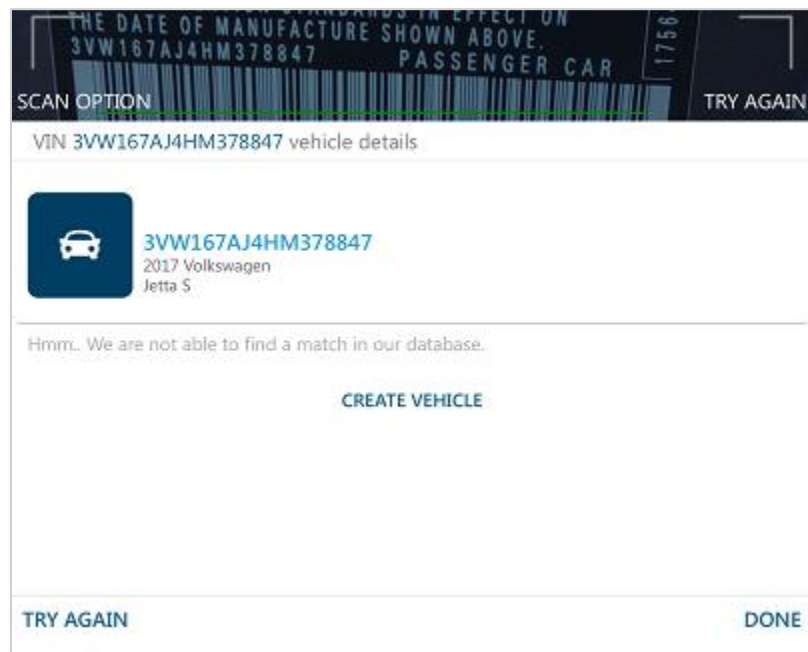
5. Tap either the vehicle pulled from the database, or **Create Vehicle** to start adding it to a customer.

VIN Barcode

1. Select **License -barcode** from the menu.
2. Line the brackets up with the barcode. The camera must be close for it to detect. **There is no camera shutter button on this screen.**



3. The system will recognize the barcode, decode the VIN, and try to search for that vehicle in the database.




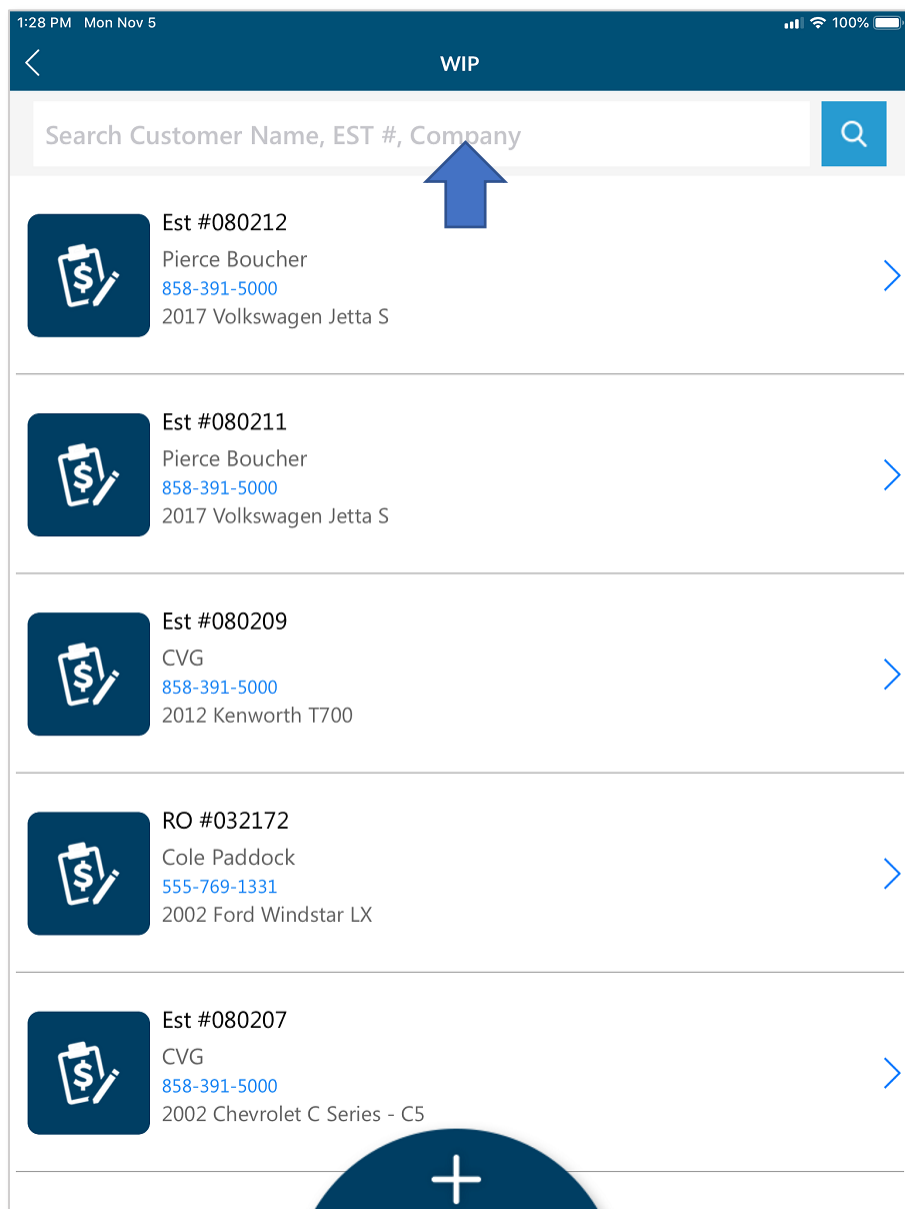
4. Tap either the vehicle pulled from the database, or **Create Vehicle** to begin adding it to a customer.

Viewing Existing Orders

There are two ways to locate existing orders using ProSpect, through **WIP Screen** or the **Customer Detail** screen.

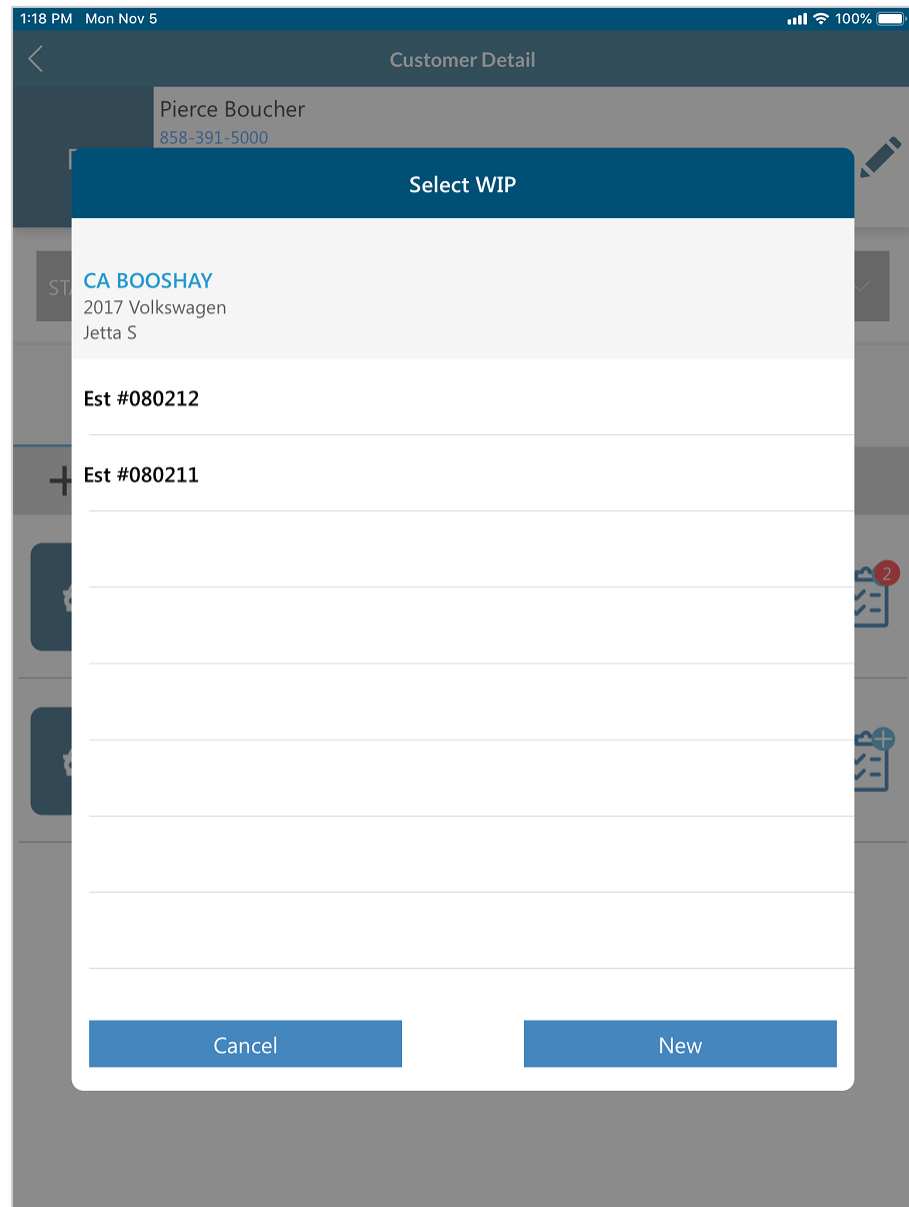
From WIP

1. On the **Home Screen**, Tap the **Order Icon**  to open the WIP.
2. Use the search bar at the top to search the WIP by **Customer Name**, **Company Name**, or **Estimate Number**.



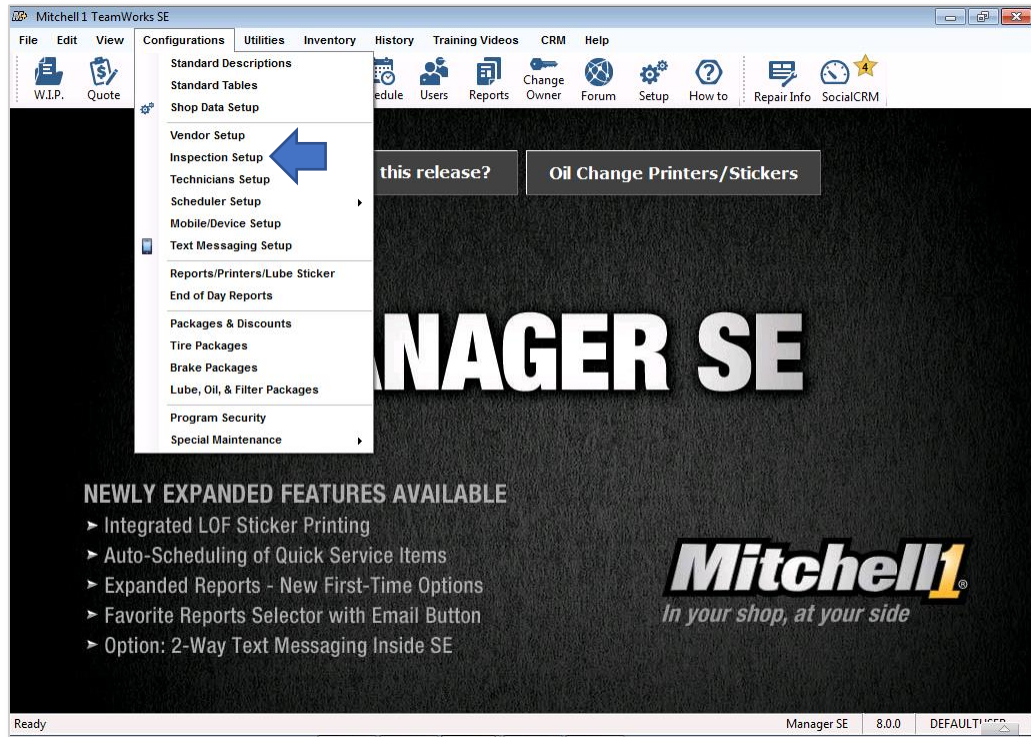
From the Customer Detail Screen

1. Open the **Customer Detail** screen.
2. Tap the clipboard icon  to bring up the **Select WIP** screen. Either select an existing order or select **New**.

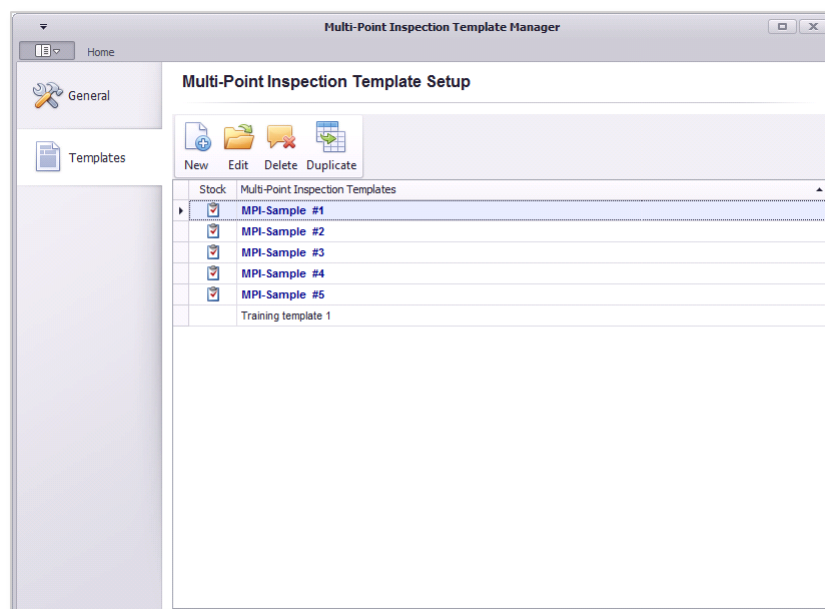


Creating Inspection Templates

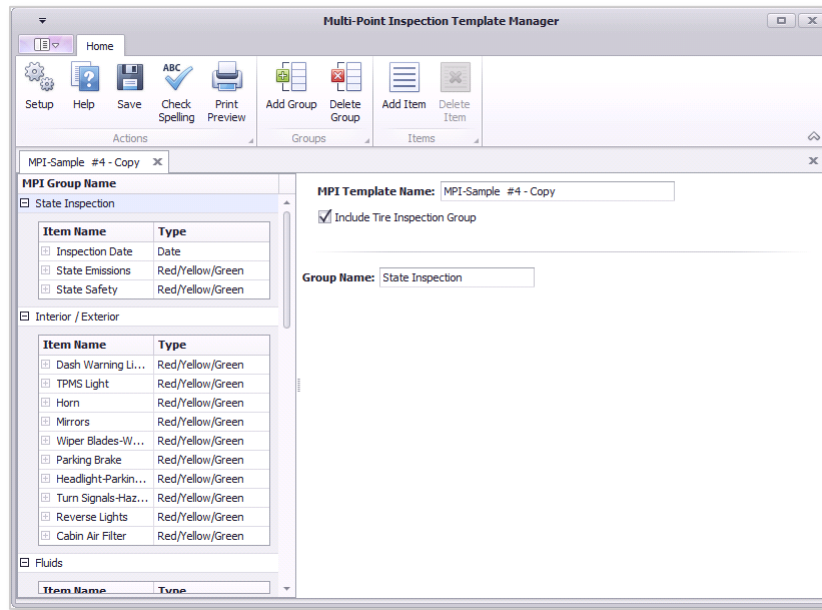
1. Open **Manager SE**. Click **Configurations** in the top left, and select **Inspection Setup** from the menu.



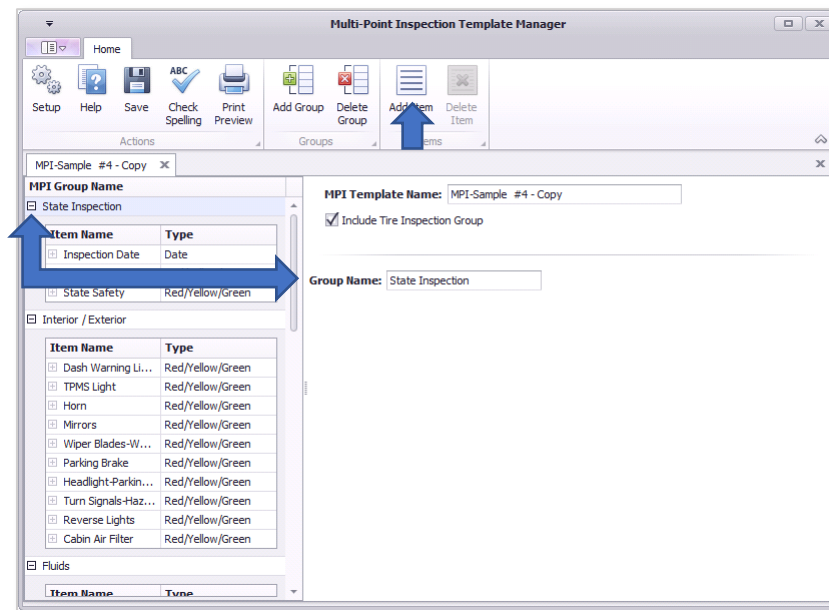
2. **Multi-Point Inspections (MPI)** can be edited or added here.
 - a. The default sample templates **must be duplicated to be edited**.



- Click **NEW** and enter a name for the template. If desired, check the **Include Tire Inspection Group** box. To add a new group of inspection items, click **Add Group**.



- On the left, the new group is added. Tap the small **+** **Button** next to the group name. Here a name can be assigned to the group and **Items** may be added.



5. Now, the **Item** must be edited to match what is being inspected. Enter a **description** along with the **Type**. Select the **Inspection Item** that best fits what is being inspected. Add as many as needed, but ensure they are properly labeled.

The screenshot shows the 'Multi-Point Inspection Template Manager' window. The 'MPI Group Name' is 'Training template 1'. Under 'MPI Template Name', it says 'Training template 1'. The 'Group Name' is 'Training group 1'. The 'Inspection Item' is 'Inspection Item 1'. The 'Description' field contains 'Description goes here'. The 'Type' dropdown menu is open, showing options: 'Red/Yellow/Green' (selected), 'Checkbox', 'Date', 'Edit Box', and 'Numeric'.

6. Once items have been added, the MPI will look like this, with multiple **Groups**, and multiple **Items** in each **Group**:

The screenshot shows the 'Multi-Point Inspection Template Manager' window with a completed template. The 'MPI Template Name' is 'MPI-Sample #4 - Copy'. The 'Group Name' is 'State Inspection'. The 'Include Tire Inspection Group' checkbox is checked. The 'Item Name' and 'Type' columns are populated with the following data:

| Item Name | Type |
|-----------------|------------------|
| Inspection Date | Date |
| State Emissions | Red/Yellow/Green |
| State Safety | Red/Yellow/Green |

Below this, there are two more groups: 'Interior / Exterior' and 'Fluids'. The 'Interior / Exterior' group contains the following items:

| Item Name | Type |
|---------------------|------------------|
| Dash Warning U... | Red/Yellow/Green |
| TPMS Light | Red/Yellow/Green |
| Horn | Red/Yellow/Green |
| Mirrors | Red/Yellow/Green |
| Wiper Blades-W... | Red/Yellow/Green |
| Parking Brake | Red/Yellow/Green |
| Headlight-Parkin... | Red/Yellow/Green |
| Turn Signals-Haz... | Red/Yellow/Green |
| Reverse Lights | Red/Yellow/Green |
| Cabin Air Filter | Red/Yellow/Green |

The 'Fluids' group is currently empty.

Adding an Inspection to an Order

1. Start a new estimate from the mobile device or from Manager SE.
2. Tap **+ Add Item**.

3:27 PM Mon Nov 5 100%

< New Estimate

PB Pierce Boucher
858-391-5000 >

2017 Volkswagen
Jetta S CA BOOSHAY >

Odometer

Irving Ibanez

ITEMS + ADD ITEM

3. Tap the **MPI** category to bring down the **MPI drawer**, select the MPI to use.

3:28 PM Mon Nov 5 100%

< New Estimate Cancel

PB Pierce Boucher
858-391-5000

2017 Volkswagen
Jetta S

Odometer

Irving Ibanez

ITEMS

MPI ^

MPI-Sample #1

MPI-Sample #2

MPI-Sample #3

MPI-Sample #4

MPI-Sample #5

Training template 1

Canned Jobs v

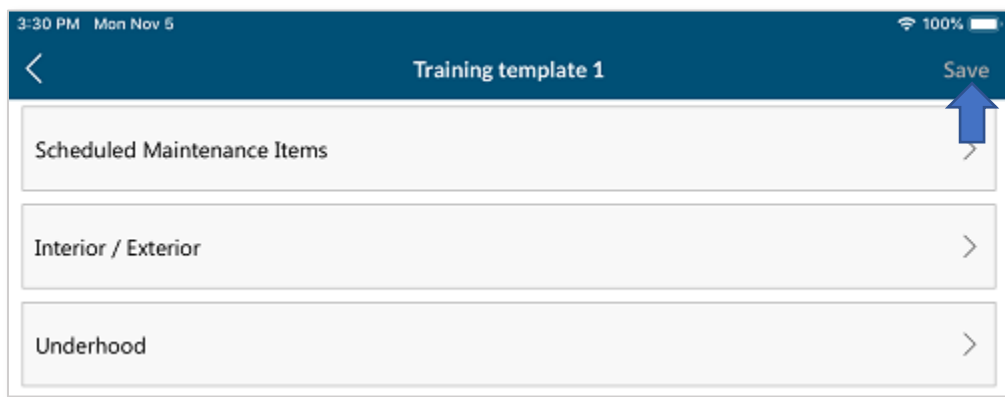
4. All **Groups** within the MPI will be displayed. Each **Group** has individual inspection **Items**.

The image shows a mobile application interface for vehicle inspection. The top screen, titled 'Training template 1', displays a list of inspection groups: 'Scheduled Maintenance Items', 'Interior / Exterior', 'Underhood', and 'Under Vehicle'. A blue arrow points from the 'Underhood' group to a detailed view of that group.

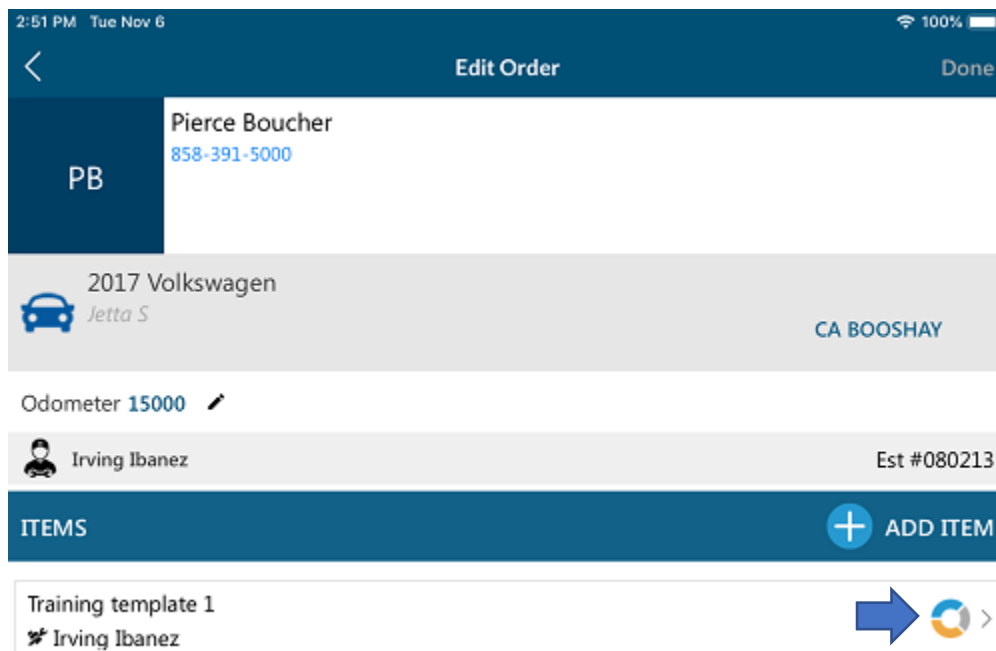
The detailed view of the 'Underhood' group shows a list of inspection items, each with a document icon, a camera icon, and three status circles (green, yellow, red). The status circles indicate the inspection result: green for 'Good', yellow for 'Fair', and red for 'Poor'.

| Item | Document Icon | Camera Icon | Green Circle | Yellow Circle | Red Circle |
|---|---------------|-------------|--------------|---------------|------------|
| Engine Oil | + | | ✓ | | |
| Brake Fluid | + | | | | ✓ |
| Coolant | + | | | ✓ | |
| Power Steering Fluid | + | | | | ✓ |
| Washer Fluid | + | | ✓ | | |
| Belts: engine, accessory, serpentine, V-drive | + | | | ✓ | |
| Hoses: Engine, power steering & HVAC | | | | | |

5. The inspection groups will display the number of remaining items in that group, or simply **Done** when complete. When all groups say done, **Save** the inspection.

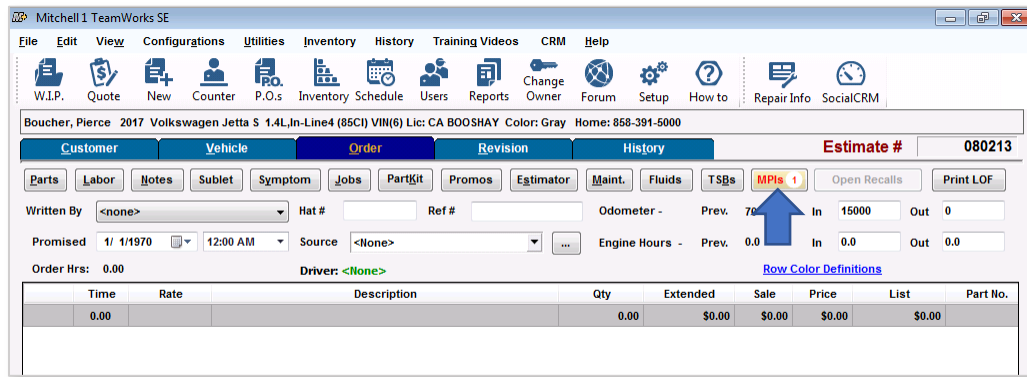


6. The inspection will be added to the order, which can be seen in both ProSpect and Manager SE.

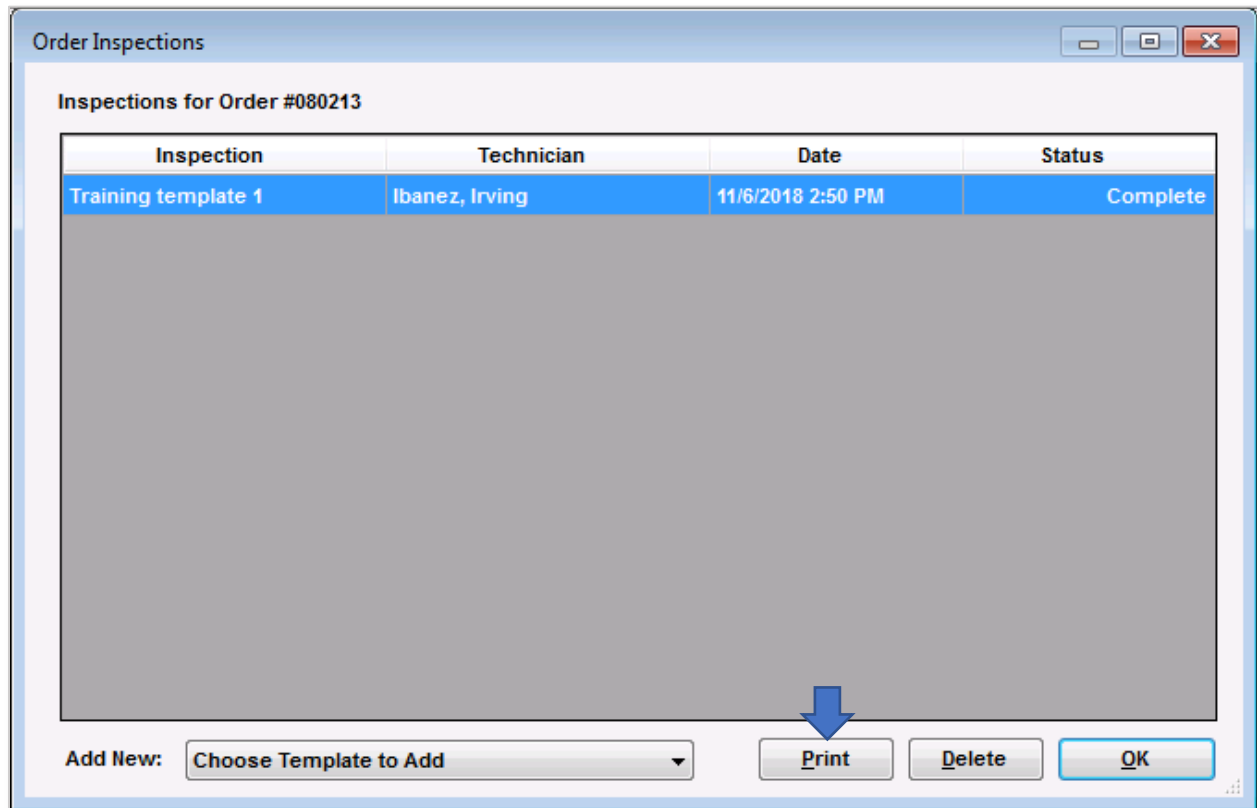


Printing Inspections from SE

1. Open the order in Manager. The **MPIs light** will be blinking if there is an inspection on the order.




2. Select the inspection, click **Print**. The vehicle inspection report will print. While printing, a prompt may show to confirm which **Comments** and **Photos** to print on the inspection sheet.



The Schedule

The Schedule in ProSpect is Read-Only. Appointments cannot be created or modified outside of Manager SE.

Viewing the Schedule

1. Tap the **Schedule Button**  on the **Main Screen**.
2. On the **Schedules Screen**, select a date to view its appointments.
 - a. Tapping an **Appointment** will take you to the **Customer Detail Screen** for that customer.

