Mitchell1 and ShopKey ProSpect

User Guide

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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

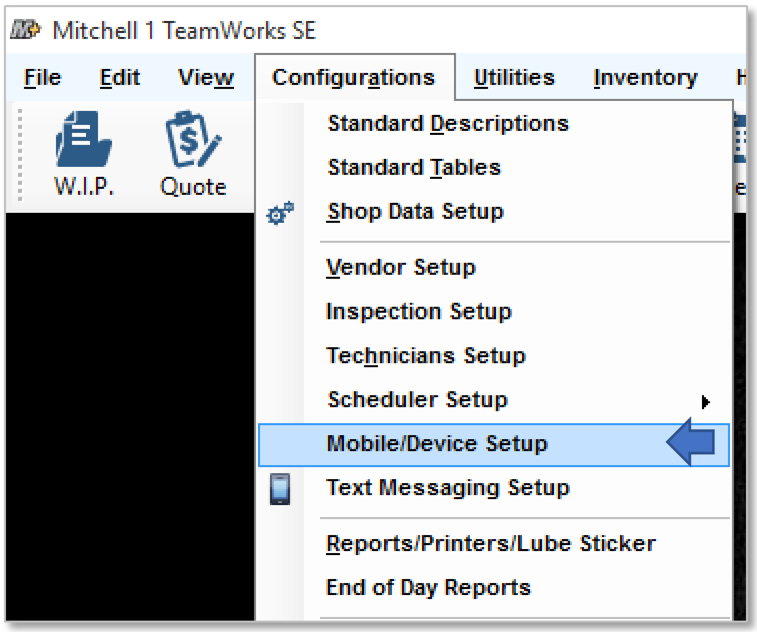
Downloading ProSpect

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

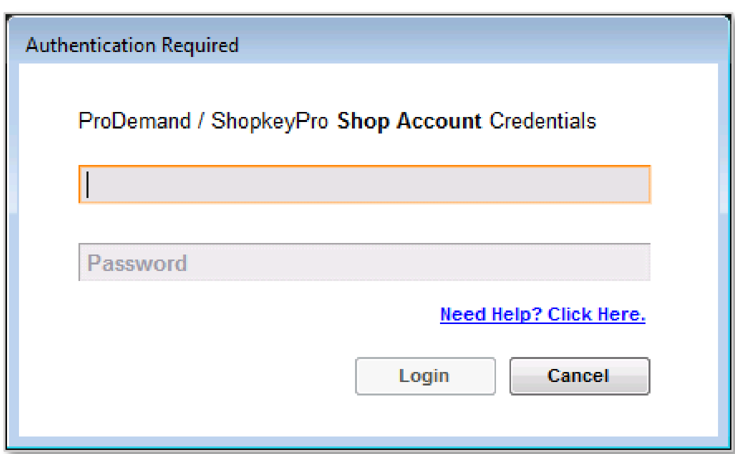
ProSpect Setup

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.**

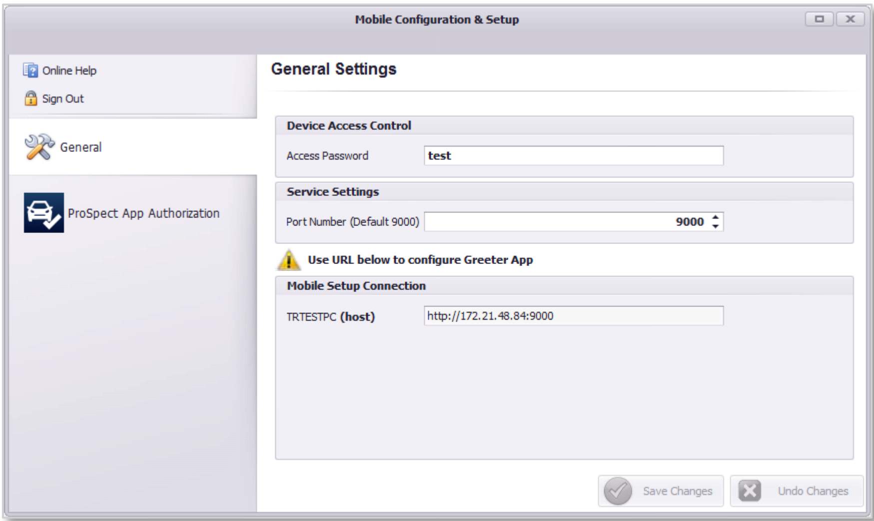
1. Open Manager SE. In the upper left, open the **Configurations** menu then select **Mobile/Device Setup**.



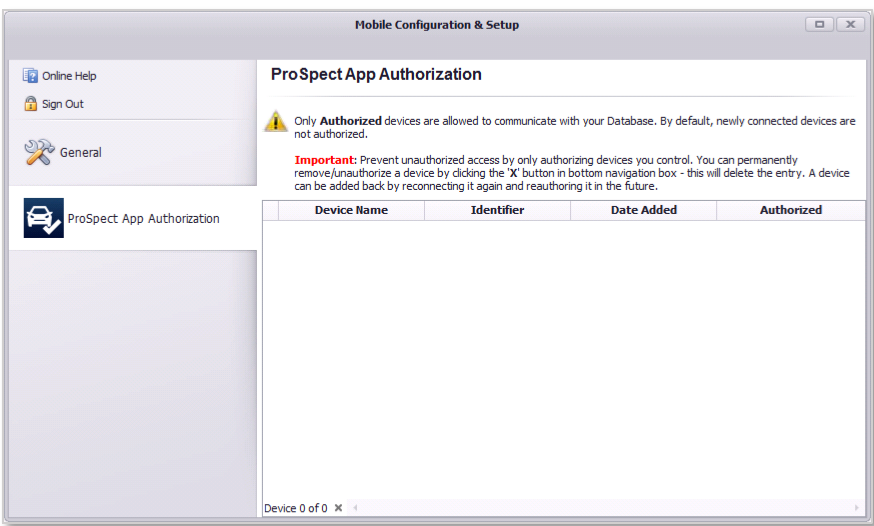
2. Enter the authorization credentials. They are the same credentials as **ProDemand/ShopKeyPro**.



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

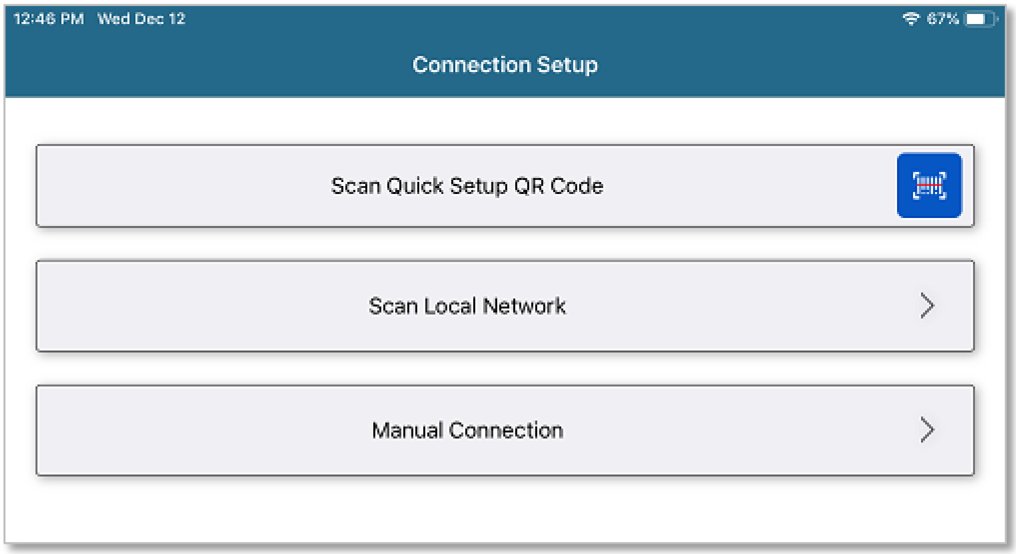


4. Next, open the **ProSpect App Authorization** section.



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.



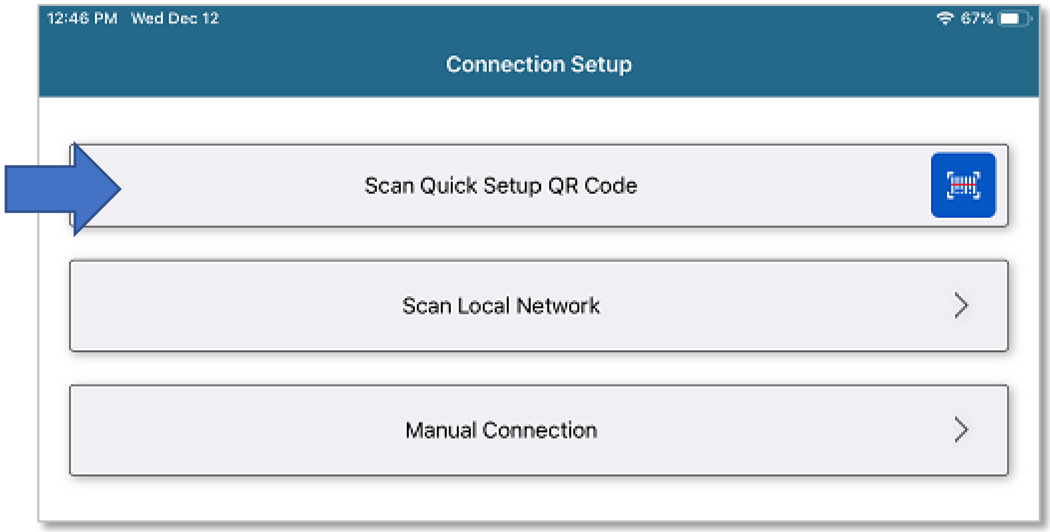
There are three ways of connecting ProSpect to Manager SE. The **Scan Quick Setup QR Code** option involves scanning a QR code from the Manager SE host, **Scan Local Network** will scan the local WI-FI network for a host, while **Manual Connection** involves manual entry of all parameters.

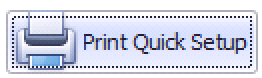
Note: Password

> 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.

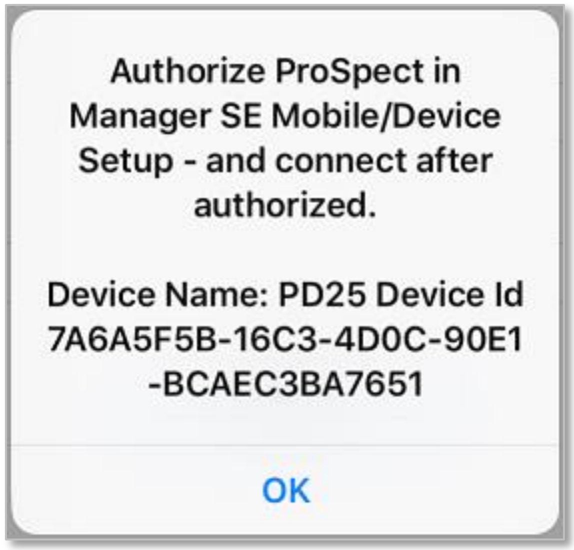
Scan Quick Setup QR Code

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

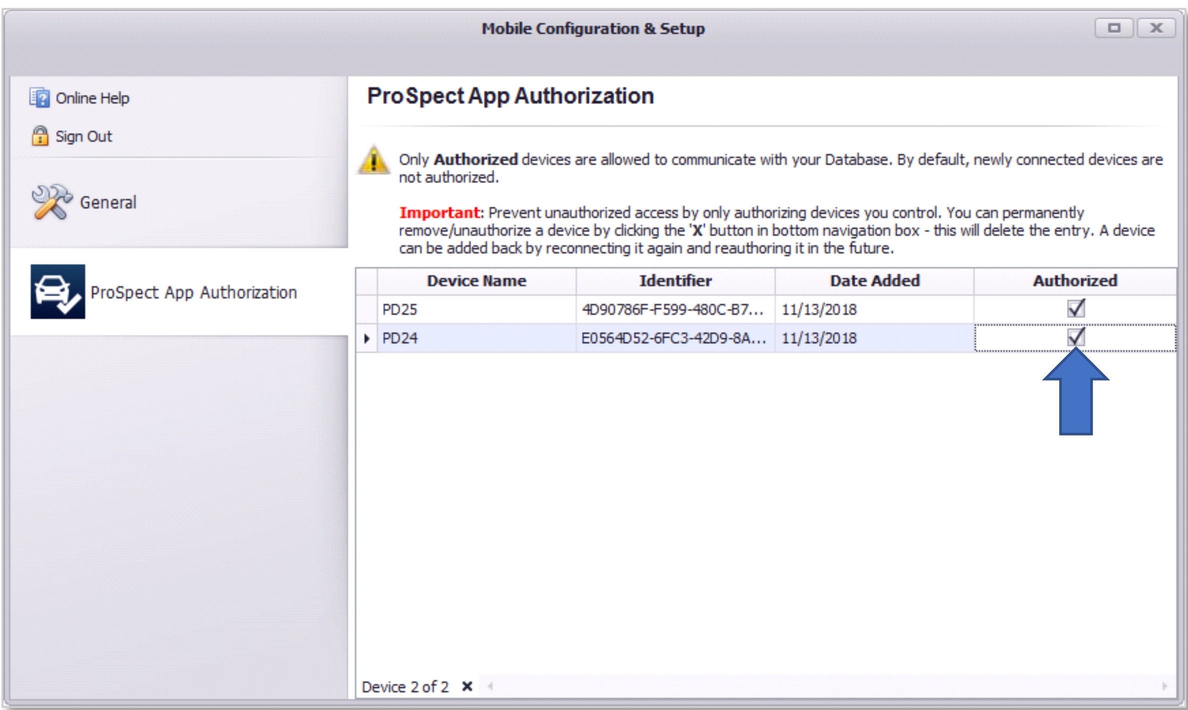


2. On the host computer, go to Configurations **then Mobile/Device Setup**. Once there, select the General tab.
3. At the bottom, click  to display the QR code.

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.

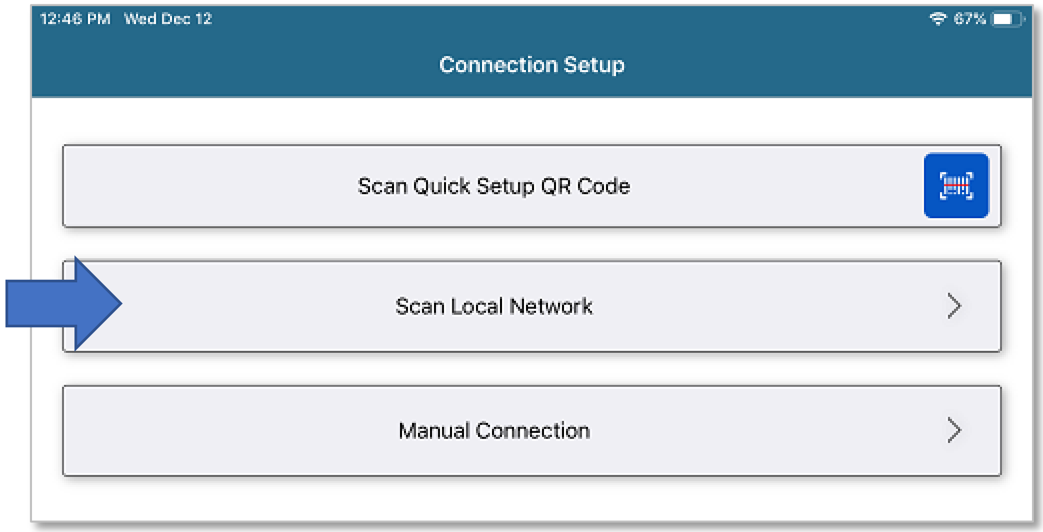


6. In Manager SE, authorize the mobile device in the **ProSpect App Authorization** section of **Mobile/Device Setup**

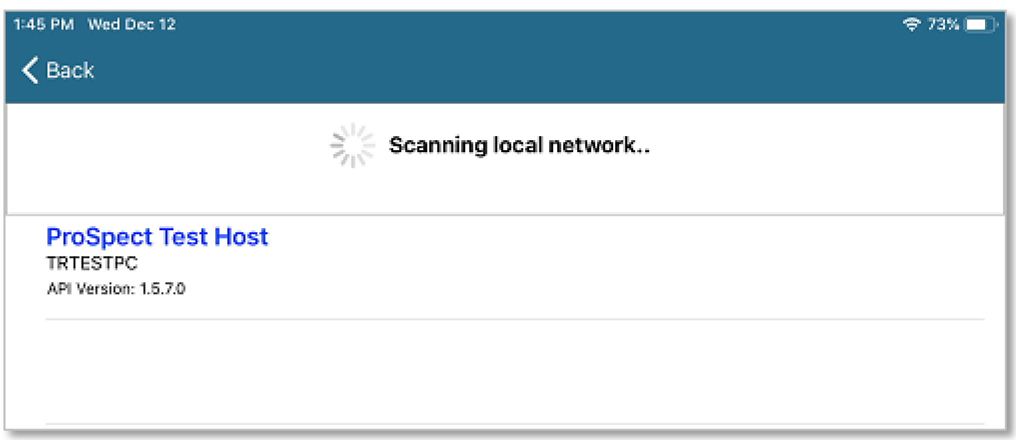


Scan Local Network

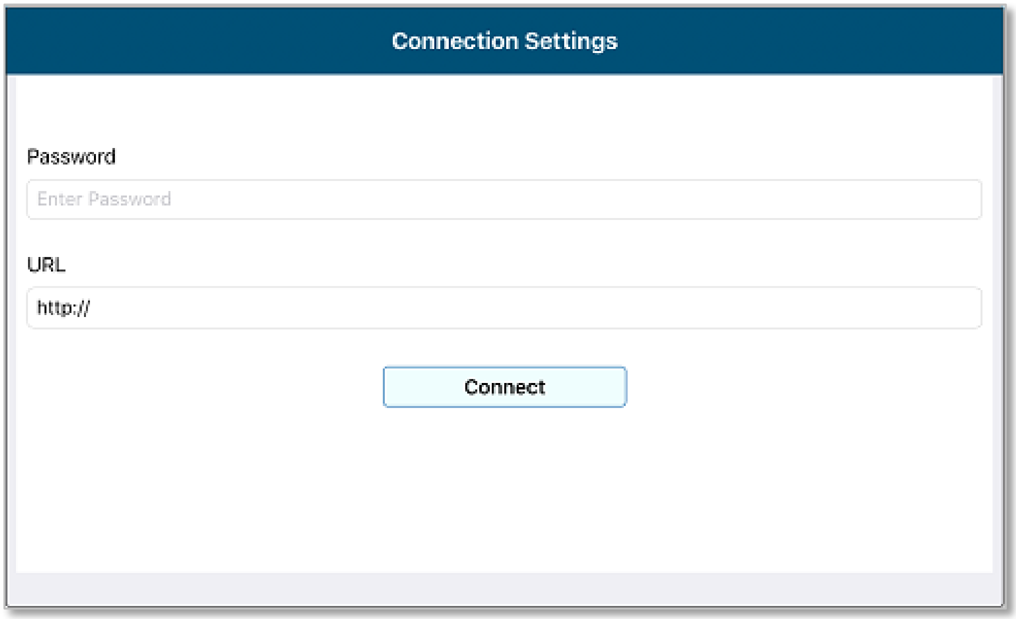
1. On the mobile device, tap **Scan Local Network** from the Connection Setup menu.



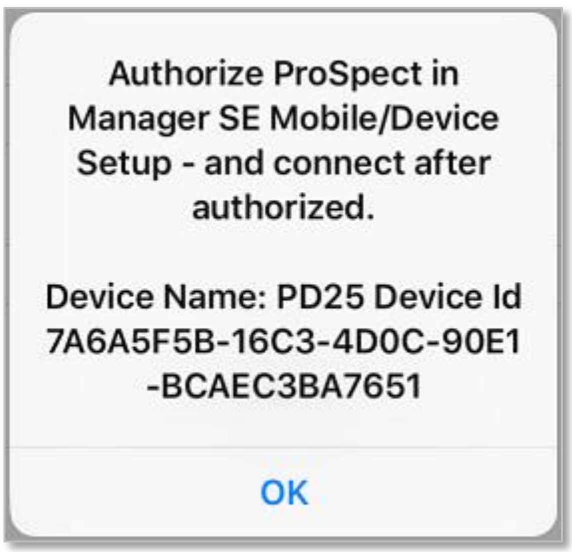
2. Tap the shop name. It will appear, with the PC name and API version below, like so:



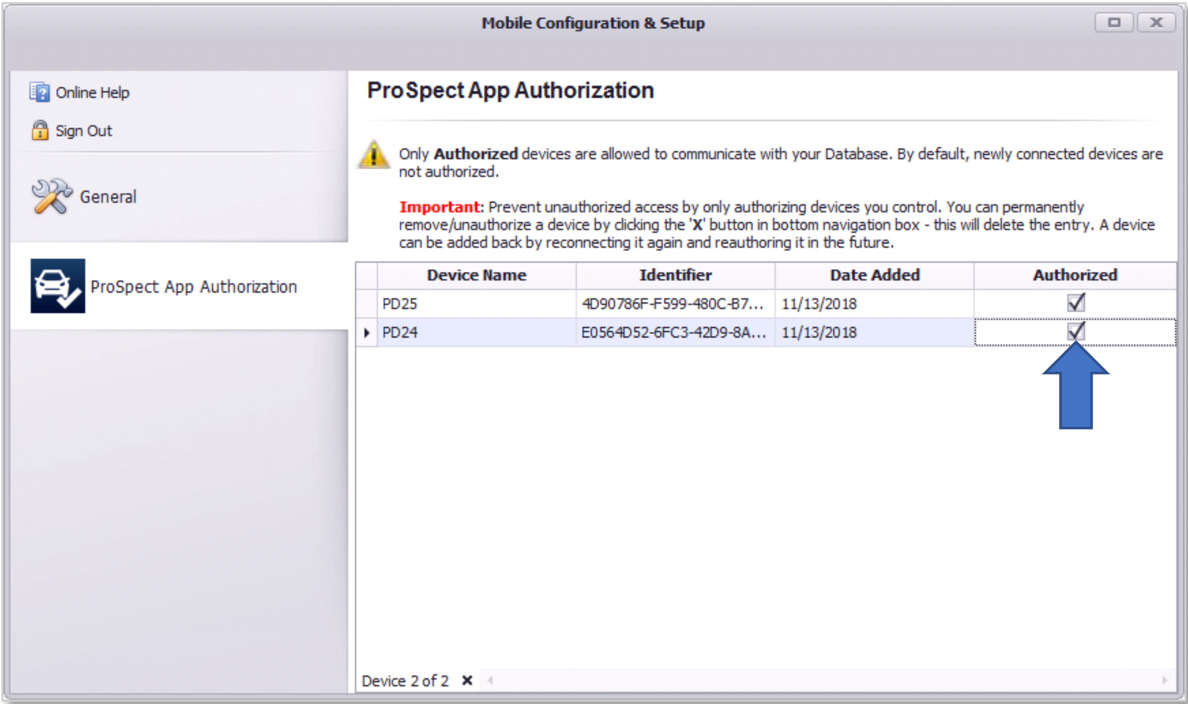
3. On the next screen, enter the password from the **Mobile\Device Setup** screen.



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

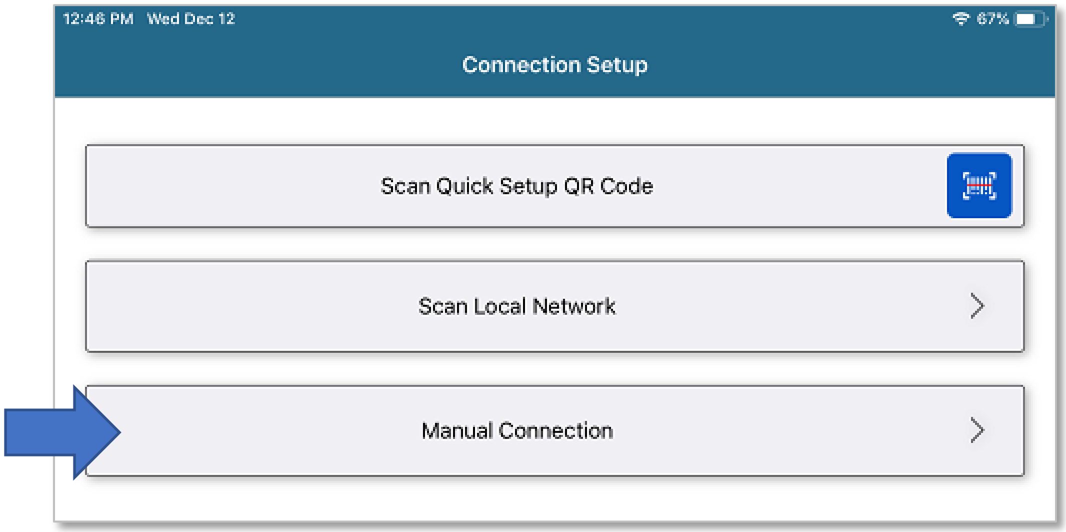


5. In Manager SE, authorize the device in the **ProSpect App Authorization** section of **Mobile/Device Setup.**

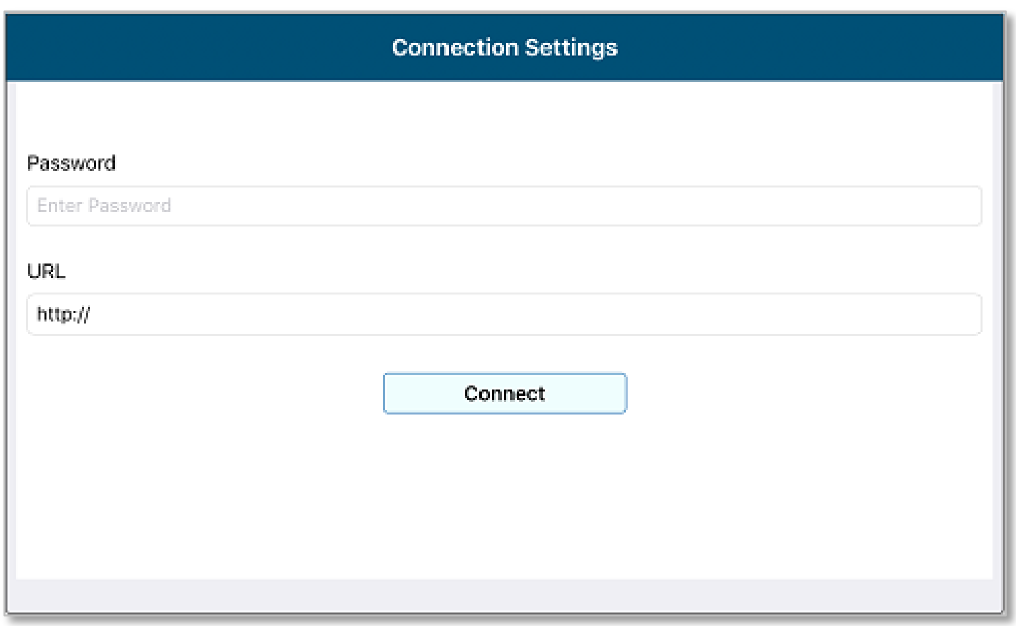


Manual Connection

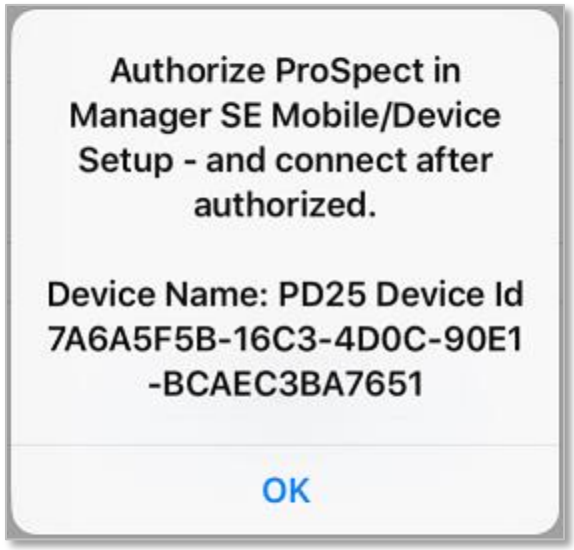
1. On the mobile device, tap **Manual Connection** from the Connection Setup menu.



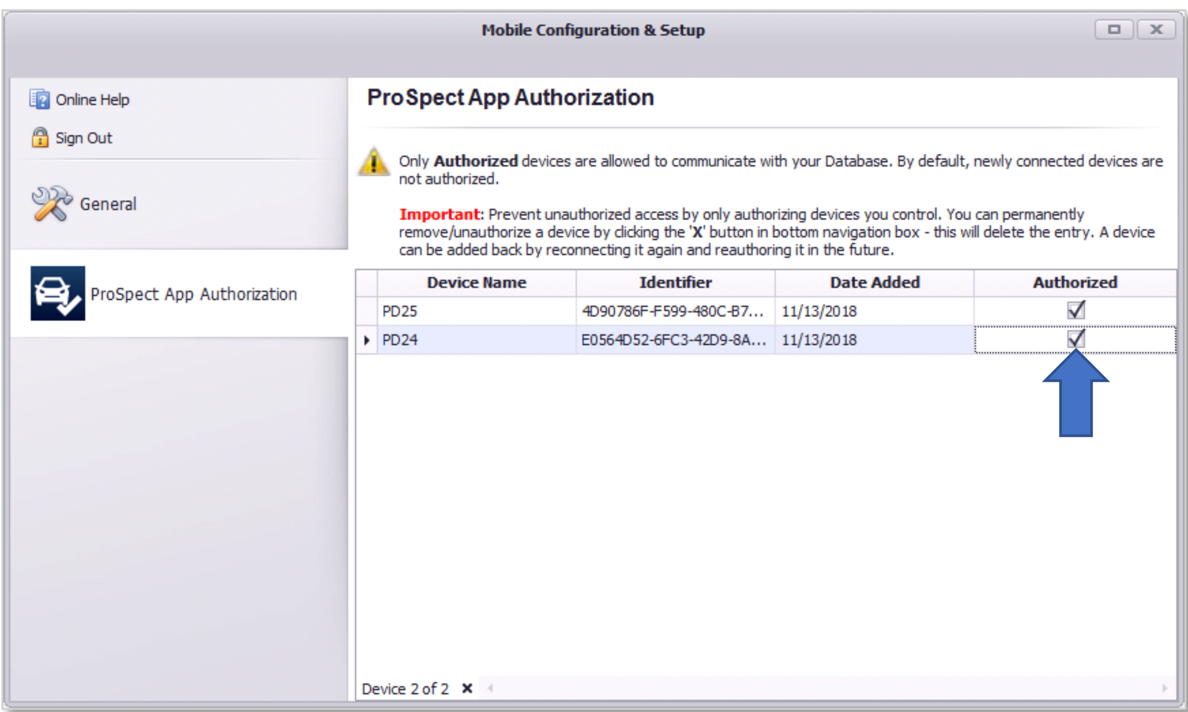
2. The **Password** must match the one in step the **Mobile/Device Setup** screen in Manager SE. The **URL** must match the ***full*** **URL** located on the same screen (including the "http://").



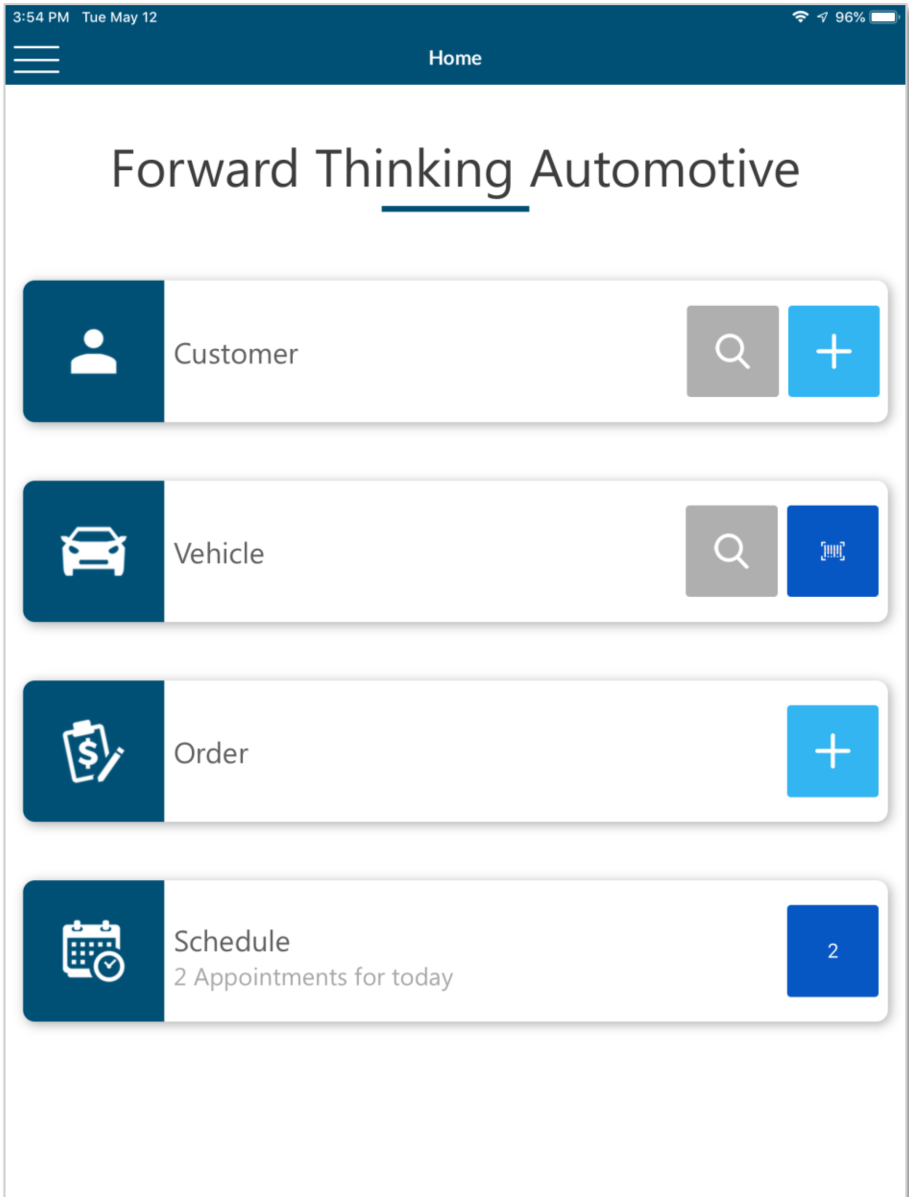
6. After tapping **Submit**, if successful, the **Device Not Authorized** message will display.



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.



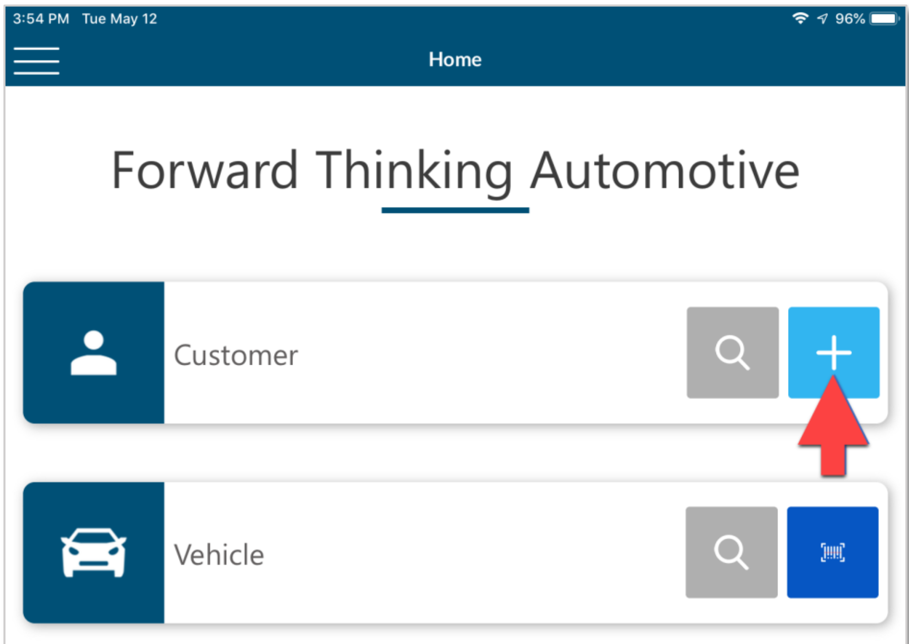
How to Add a Customer

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

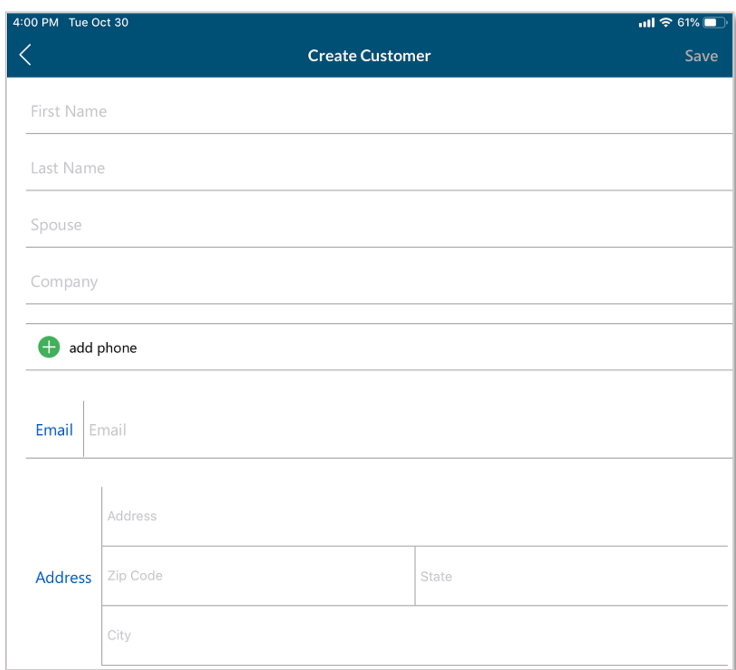
See How to Scan a VIN Barcode or License

Method 2: The **Home Screen**

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



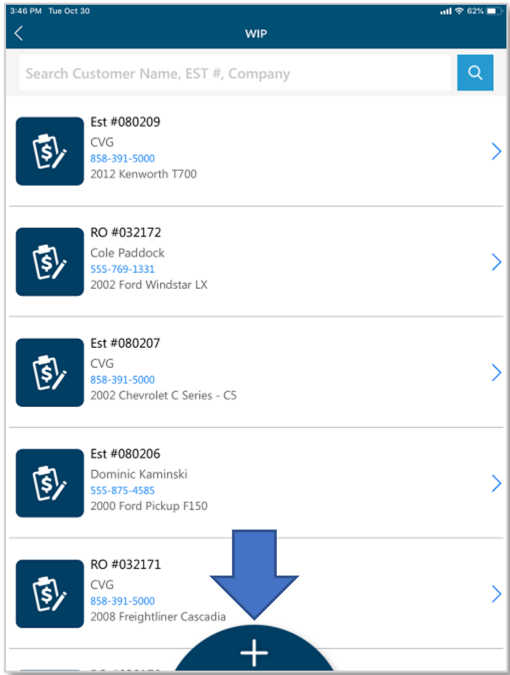
2. Enter customer information.



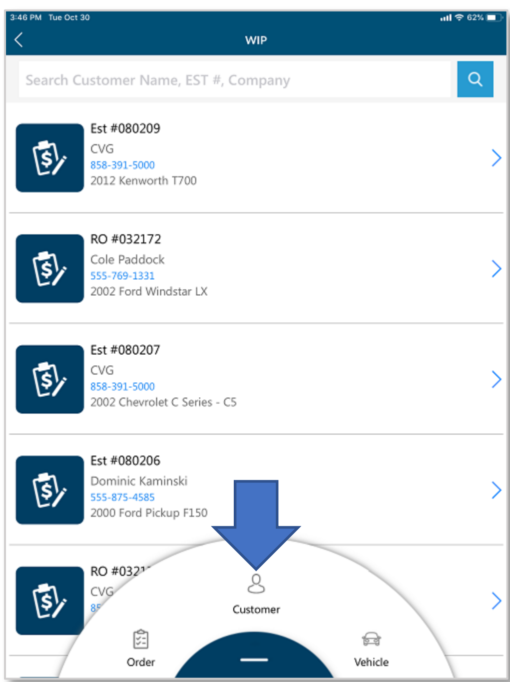
3. Tap **Save** when all information is entered.

Method 2: **The WIP Screen**

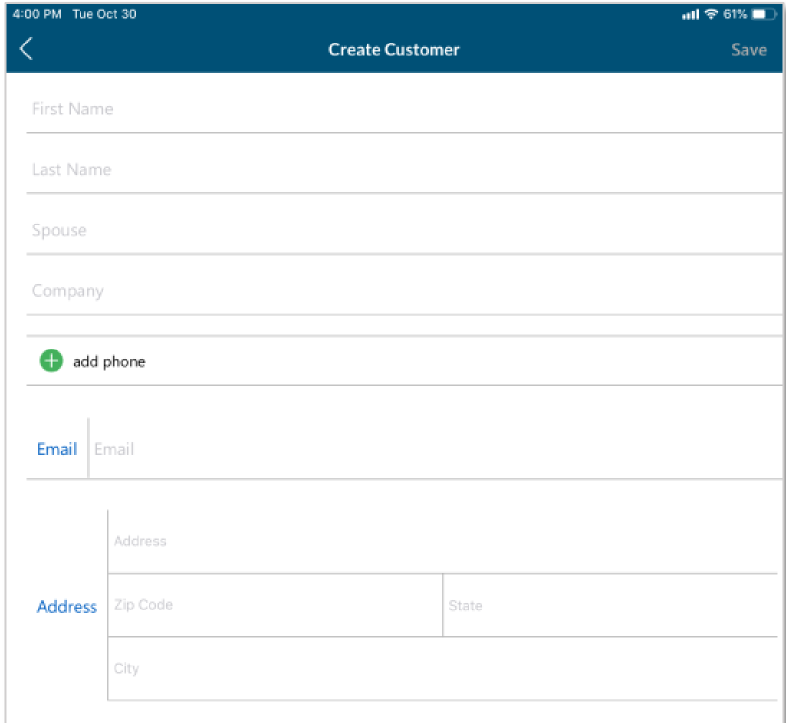
1. Tap the **+ Button** at the bottom of the **WIP Screen**.



2. Tap **Customer**.



3. Enter customer information.



4. Tap **Save** when finished.

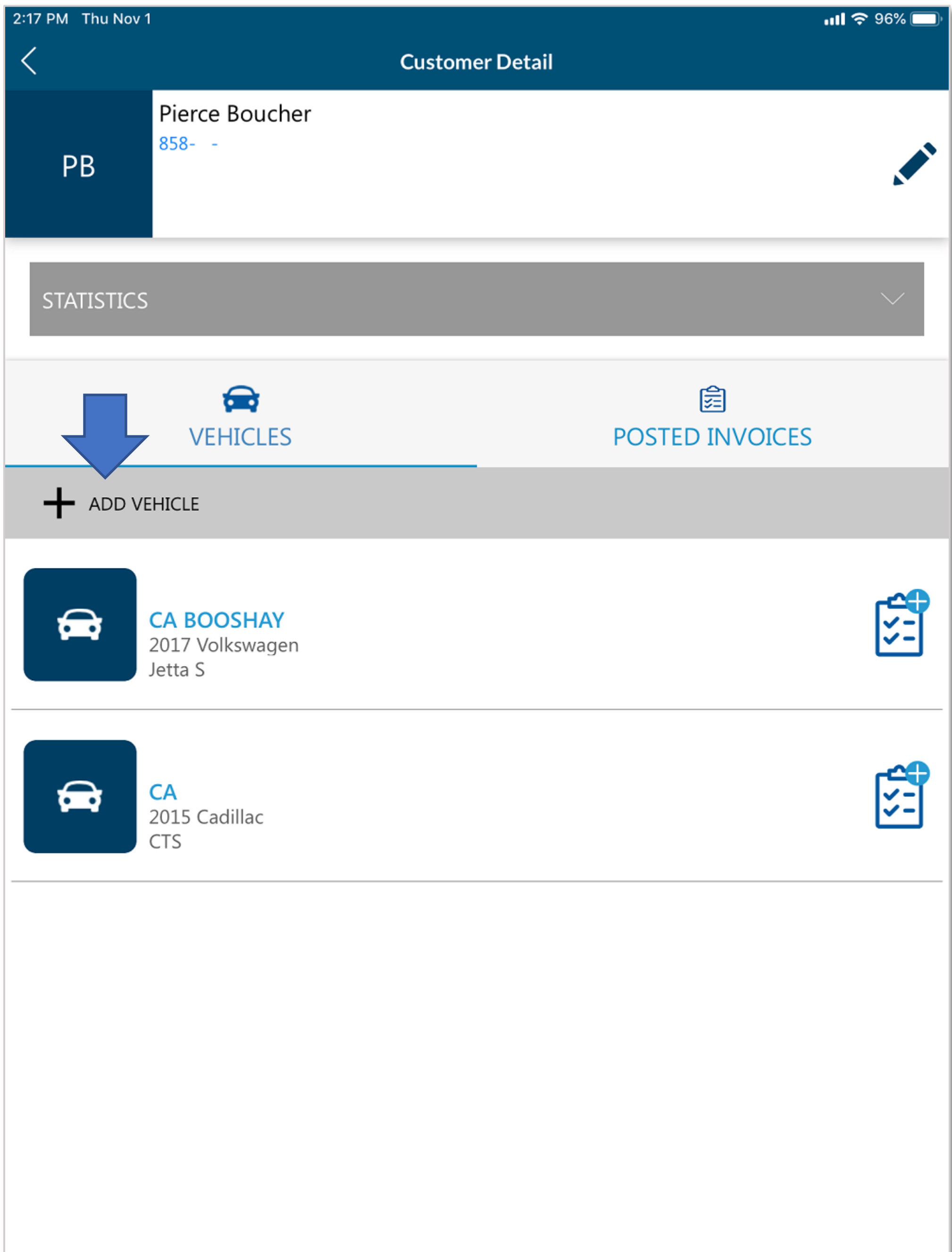
How to Add a Vehicle to a Customer

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

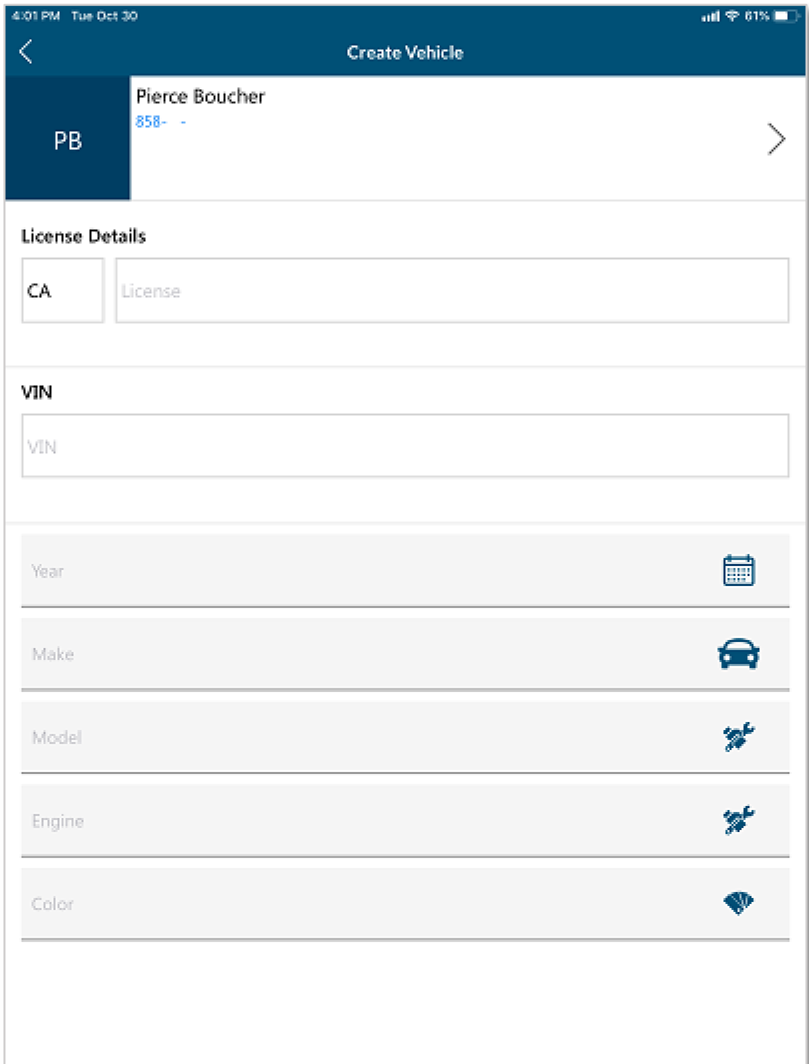
See How to Scan a VIN Barcode or License

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**.



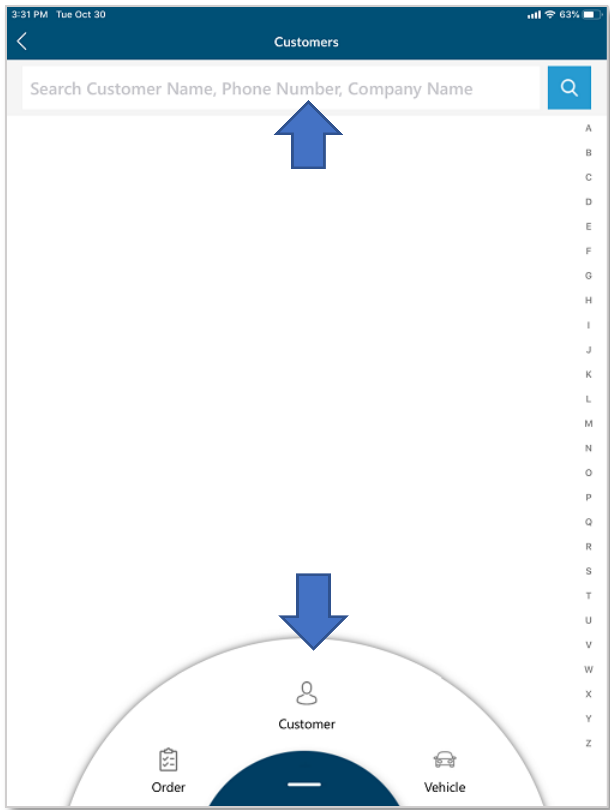
How to Look Up a Customer

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

See How to Scan a VIN Barcode or License

Method 2: **Customers Screen**

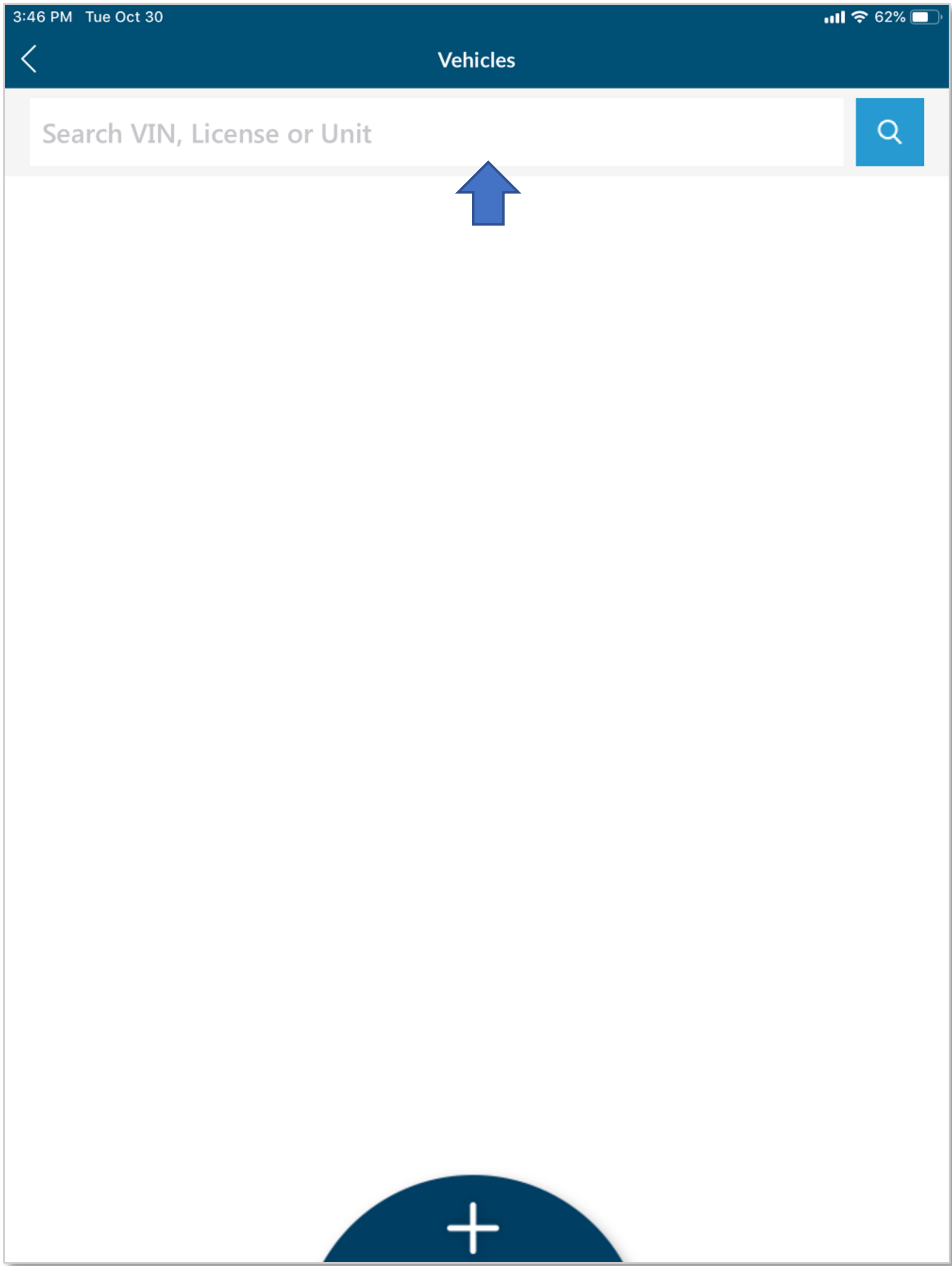
1. Tap the customer icon on the **Home** screen.
2. Tap **Customer** in the **+ Menu** or search for them in the **Search Box**.



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

Method 3: **Vehicles Screen**

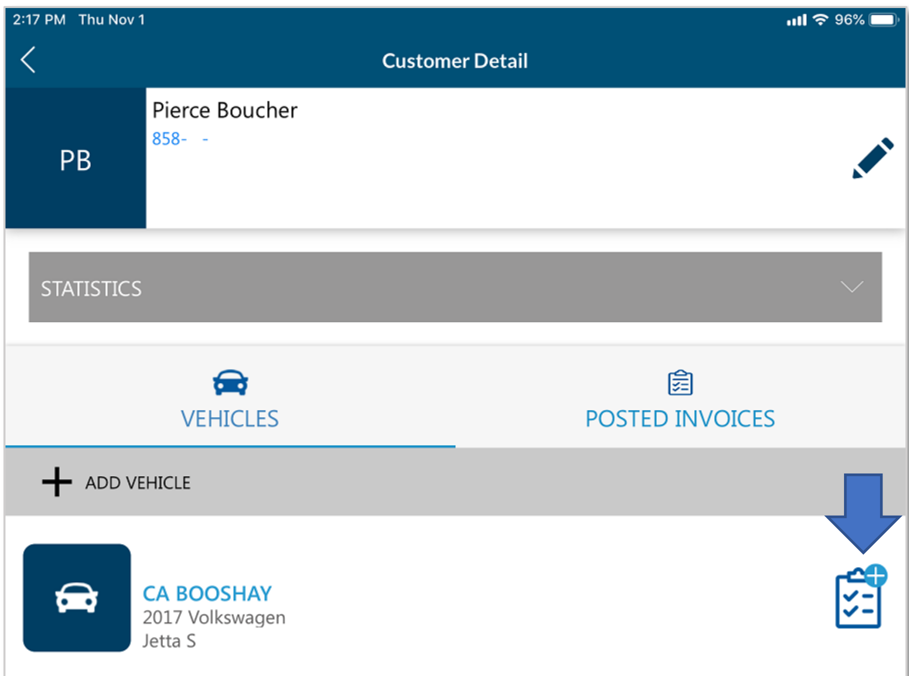
1. Tap the vehicle icon  on the **Home** screen.
2. Search by **VIN**, **License Plate**, or **Unit number.**



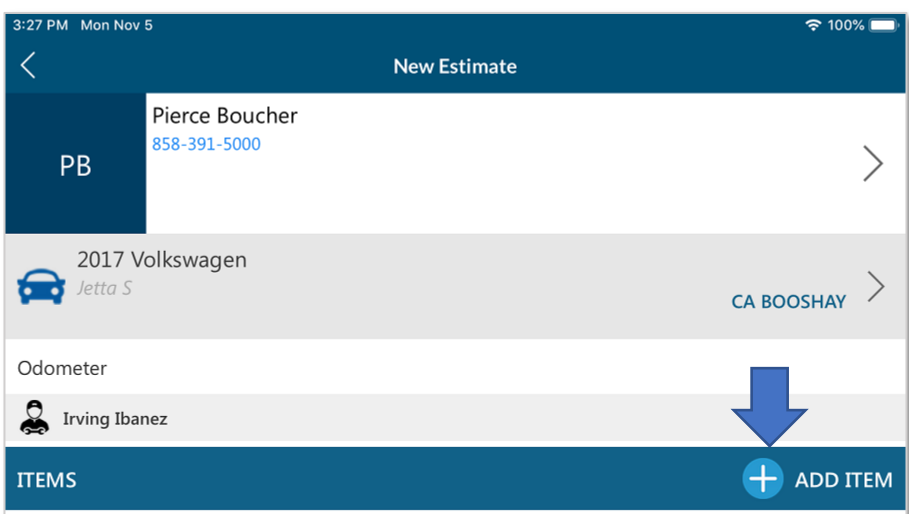
3. This opens the **Customer Detail** screen.

How to Create an Estimate

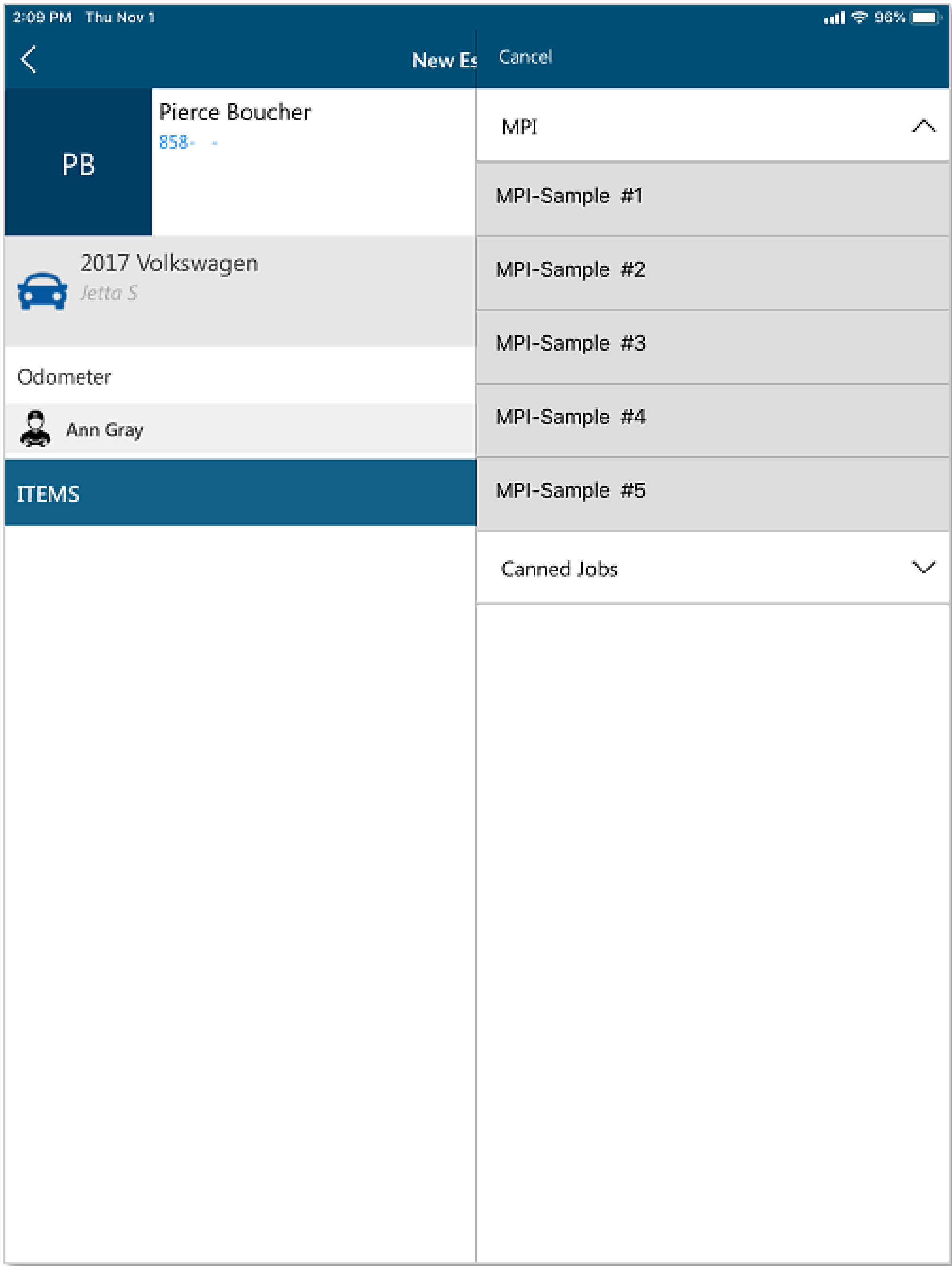
1. Select a customer; this will open the **Customer Detail** screen.
2. To start an **Estimate** for a vehicle, tap the **blue clipboard** beside it.
    a. If any orders already exist for that vehicle, a number will display on the clipboard icon, and a prompt will show to select an existing order or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



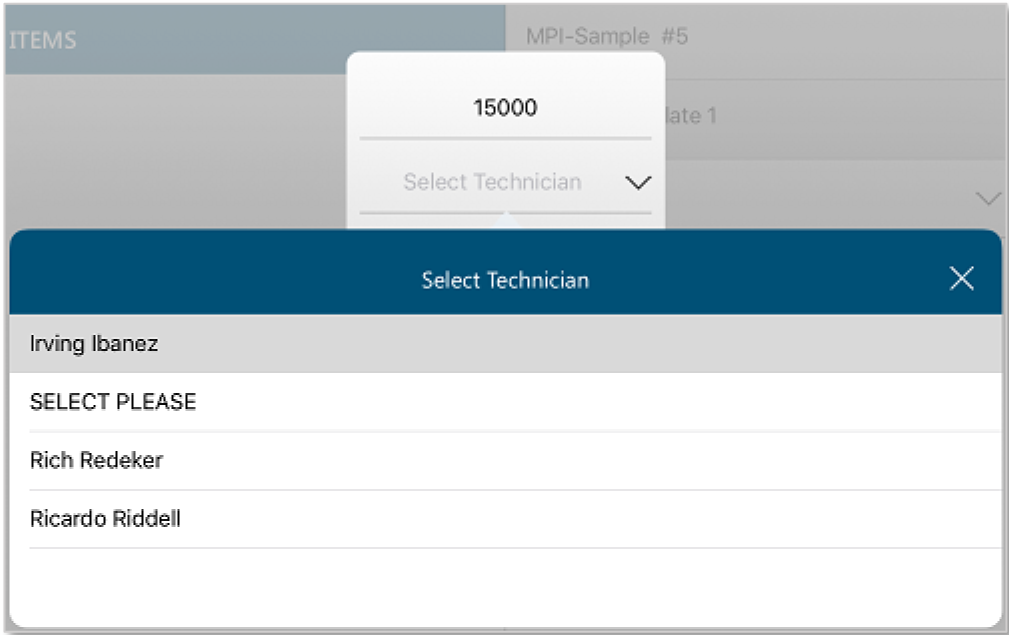
3. Tap **+ ADD ITEM** to add a new item.



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.

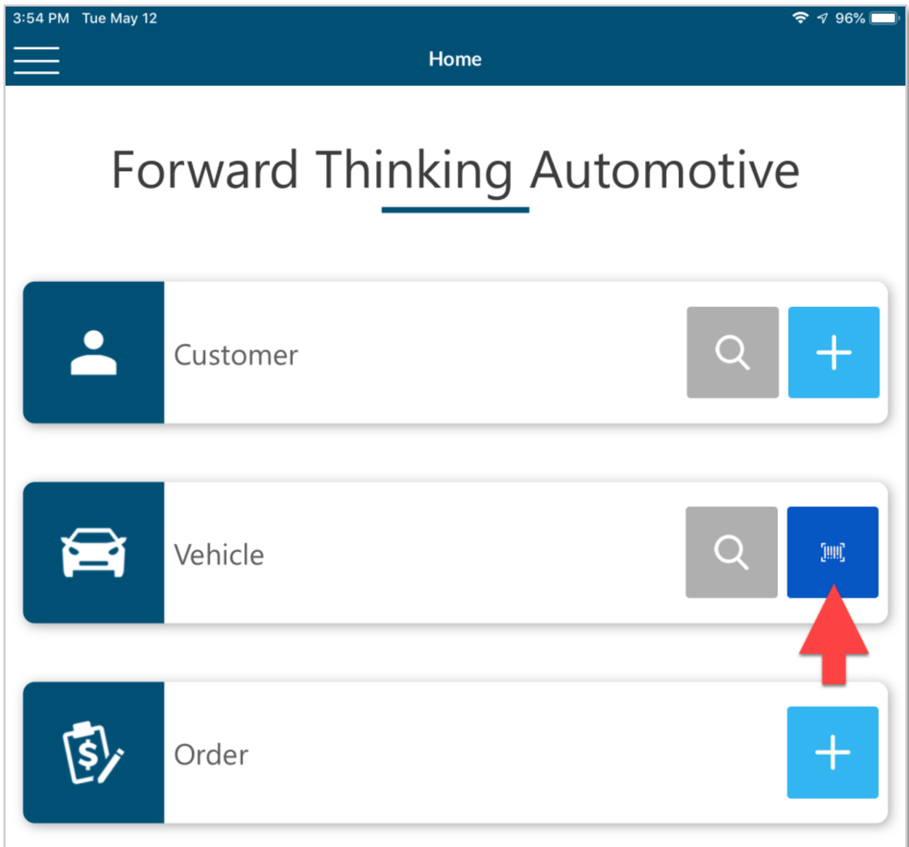


5. Add mileage and select technician.

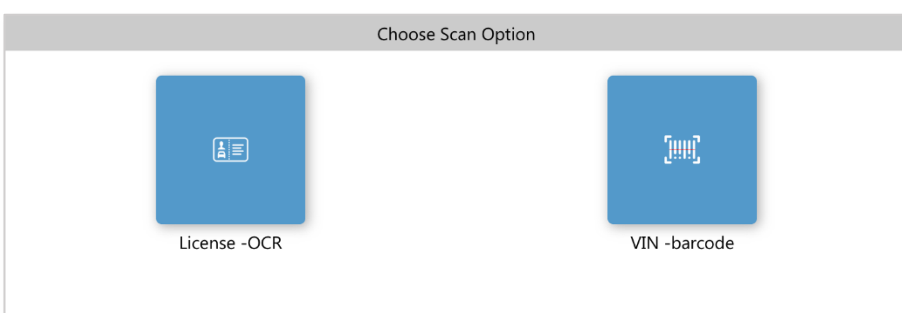


How to Scan a VIN Barcode or License Plate

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



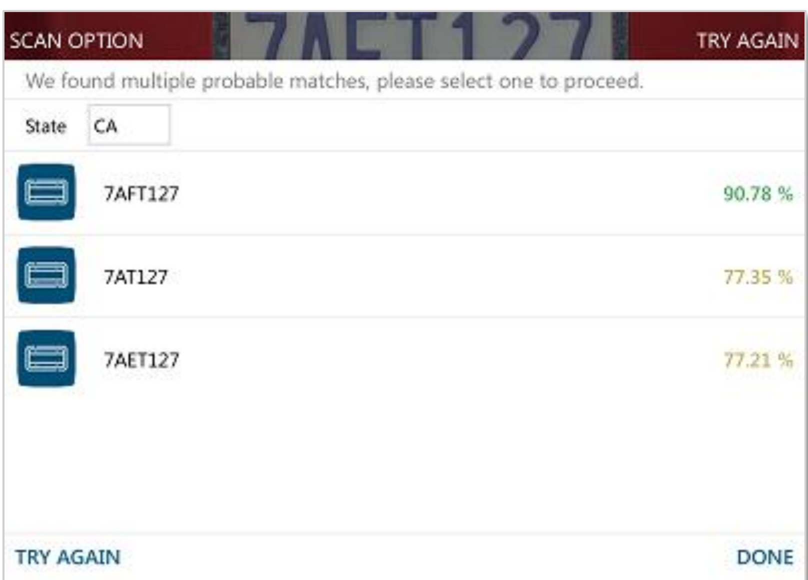
2. Choose either **License -OCR** or **VIN -barcode**, depending which is available to scan.
   a. Both areas follow the same general process, but screenshots of each area are included.



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:



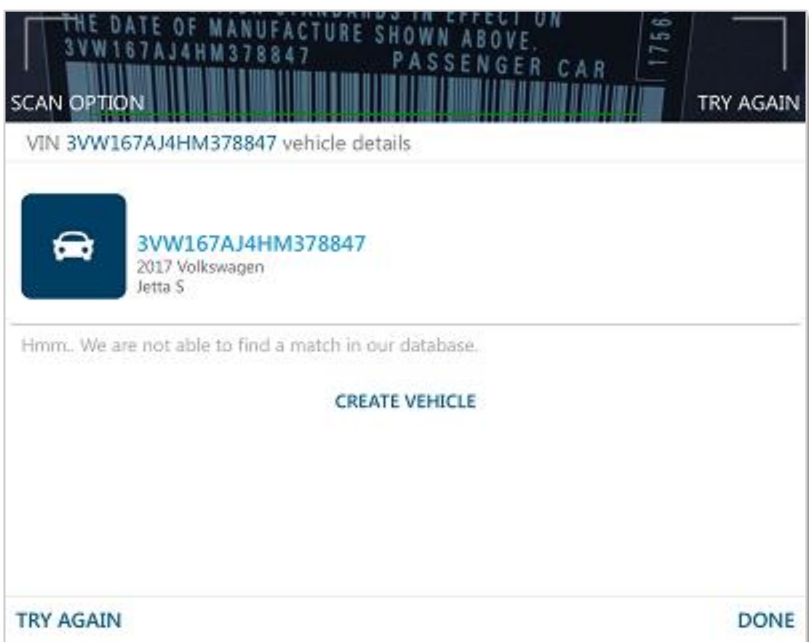
4. The prompt from step 4 will not always show, and requires either making a selection or rescanning the license plate. Once it has been selected, the system will then look to see if that car already exists in the database.

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.



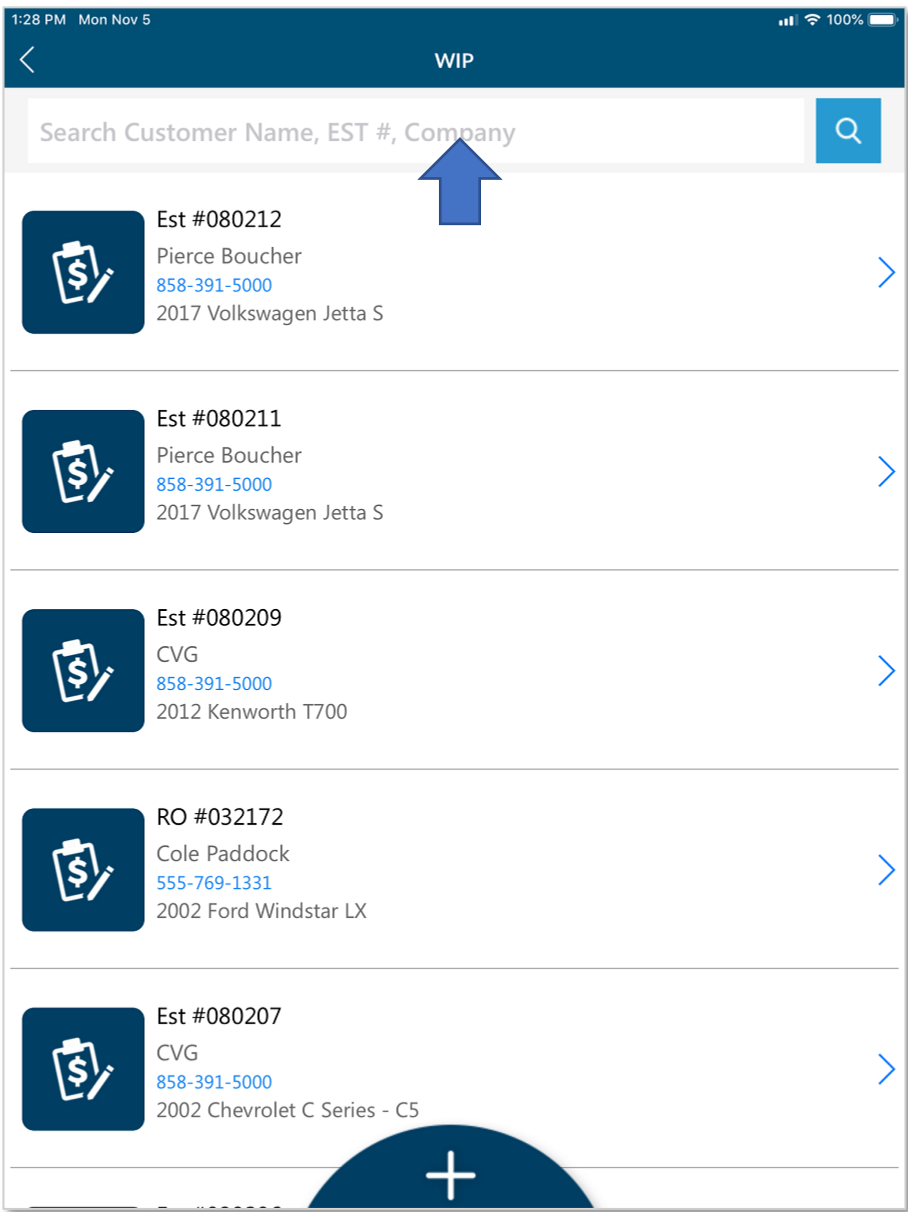
4. Tap either the vehicle pulled from the database, or **Create Vehicle** to begin adding it to a customer.

Viewing Existing Orders

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

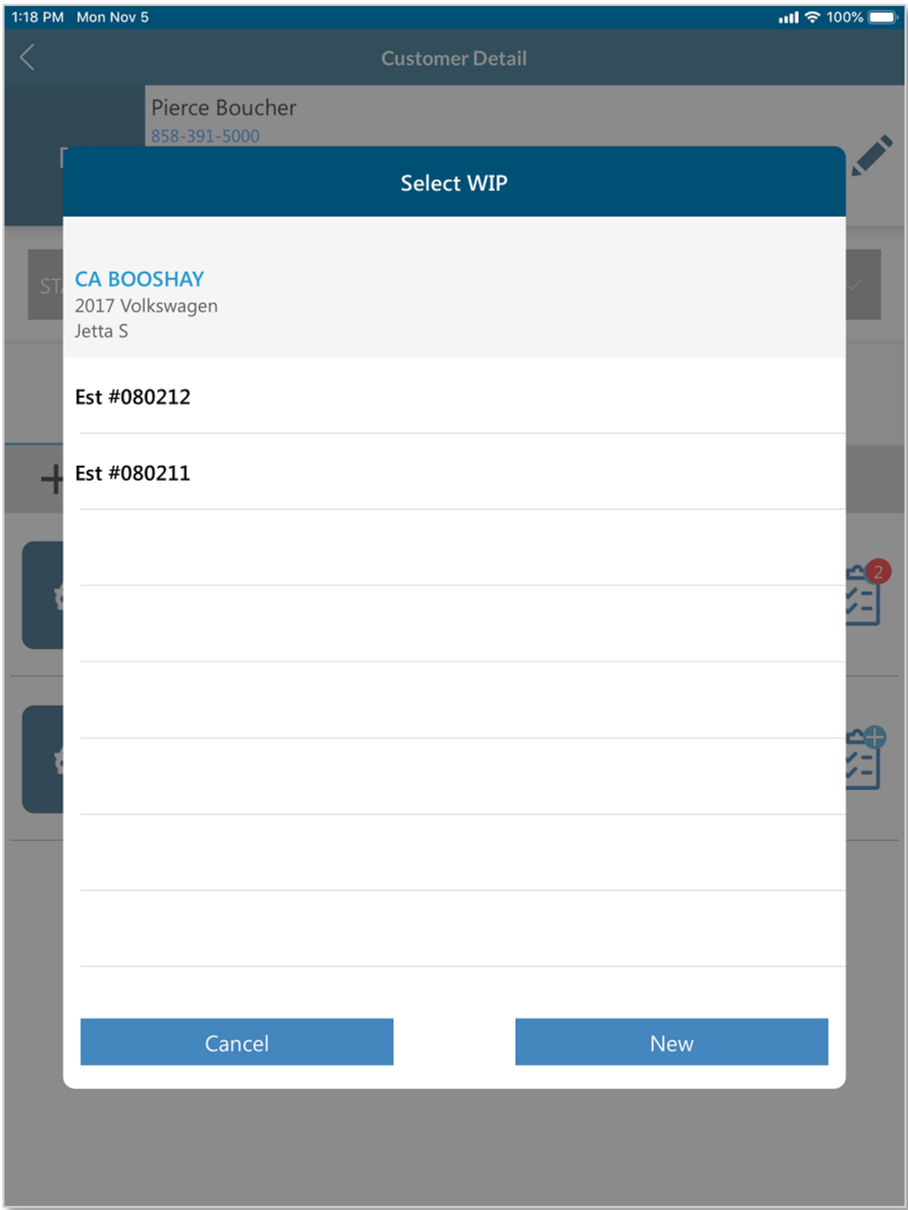
From WIP

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**.



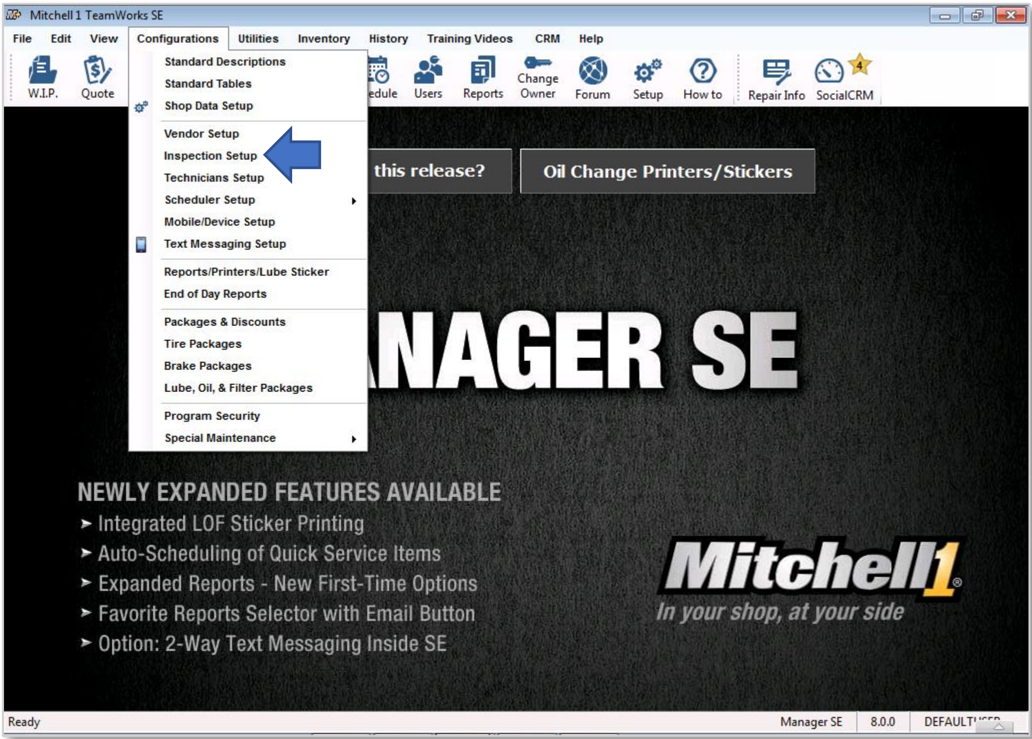
From the Customer Detail Screen

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**.

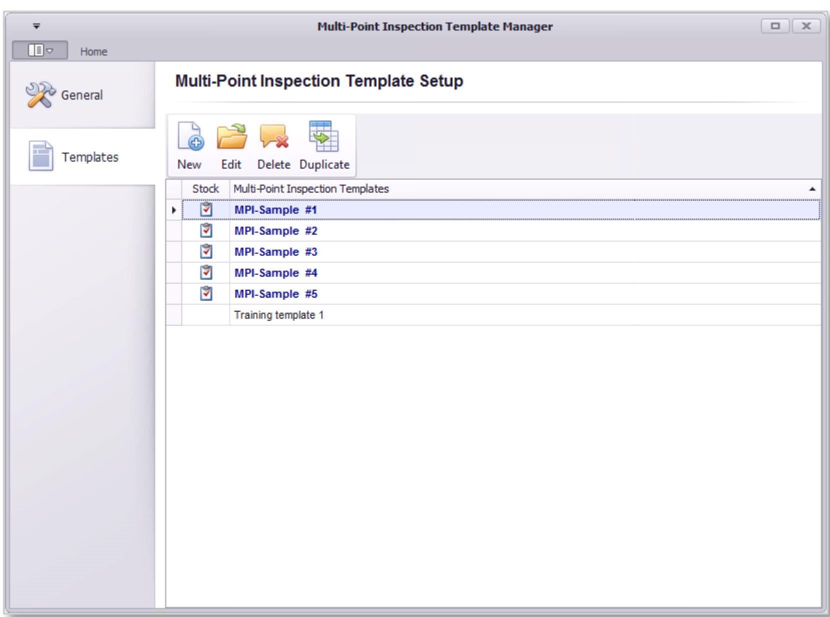


Creating Inspection Templates

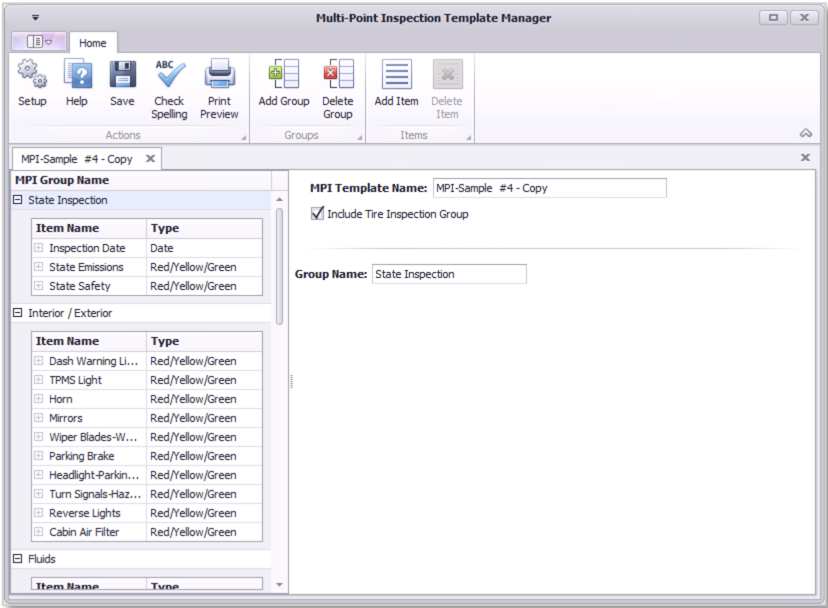
1. Open **Manager SE**. Click **Configurations** in the top left, and select **Inspection Setup** from the menu.



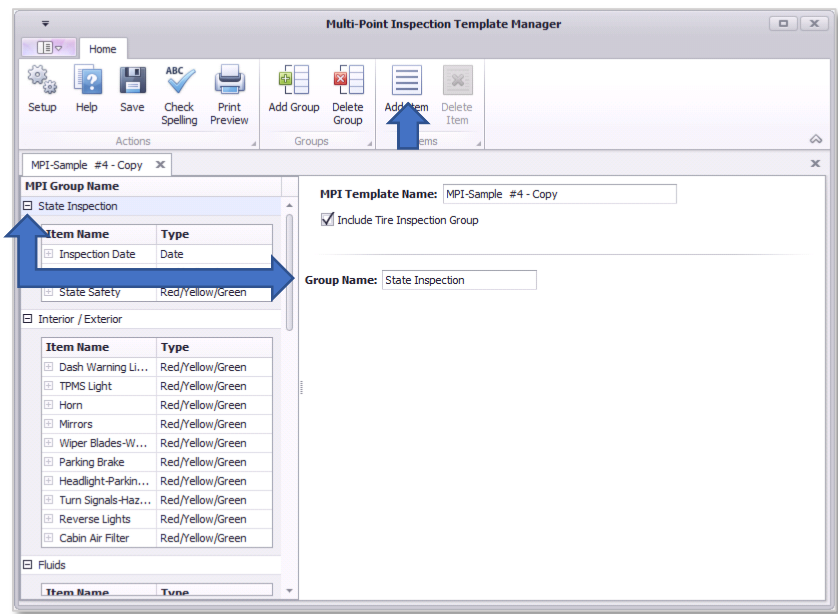
2. **Multi-Point Inspections (MPI)** can be edited or added here.
   a. The default sample templates must be duplicated to be edited.



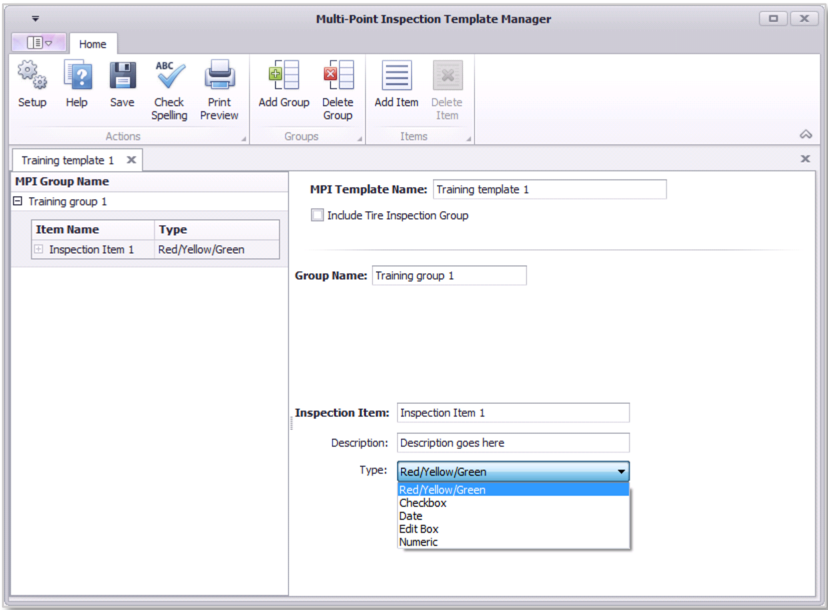
3. Click **NEW** and enter a name for the template. If desired, check the **Include Tire Inspection Group** box. To add a new group of inspection items, click **Add Group**.



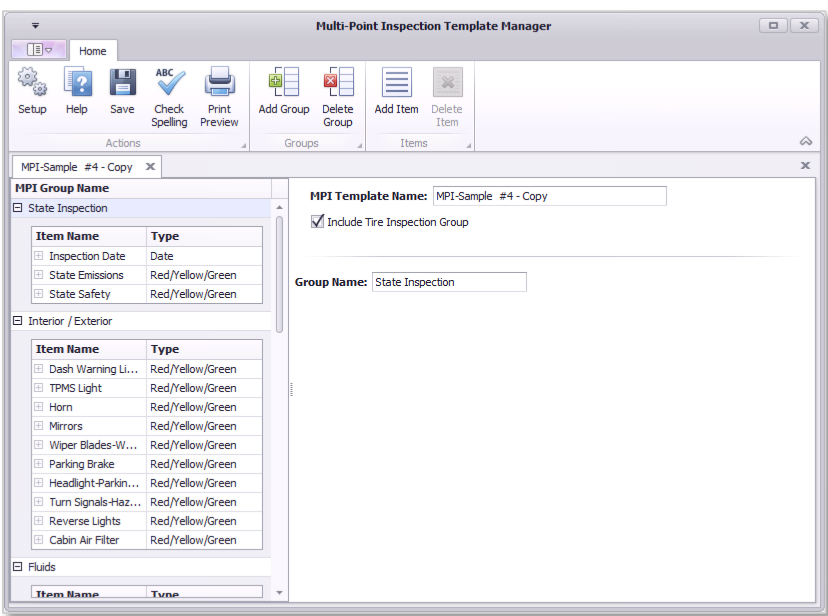
4. On the left, the new group is added. Tap the small **+ Button** next to the group name. Here a name can be assigned to the group and **Items** may be added.



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.

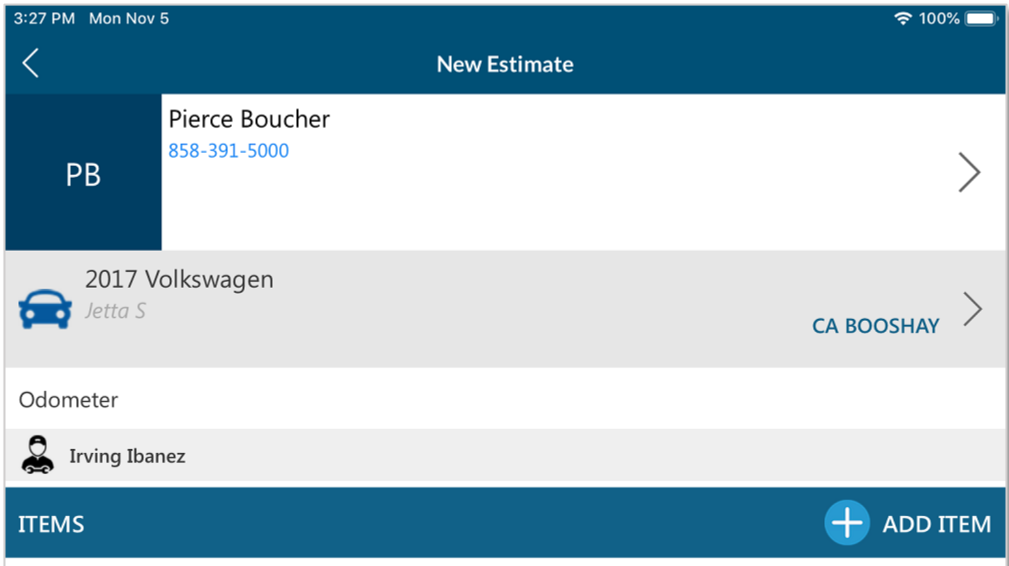


6. Once items have been added, the MPI will look like this, with multiple **Groups**, and multiple **Items** in each **Group**:

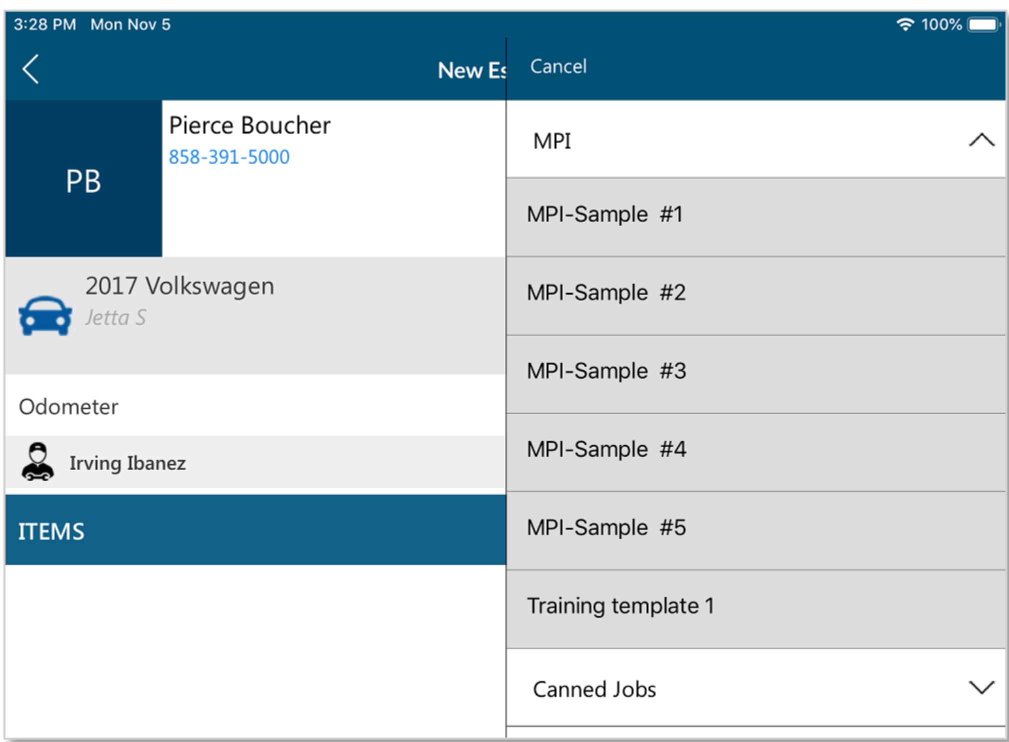


Adding an Inspection to an Order

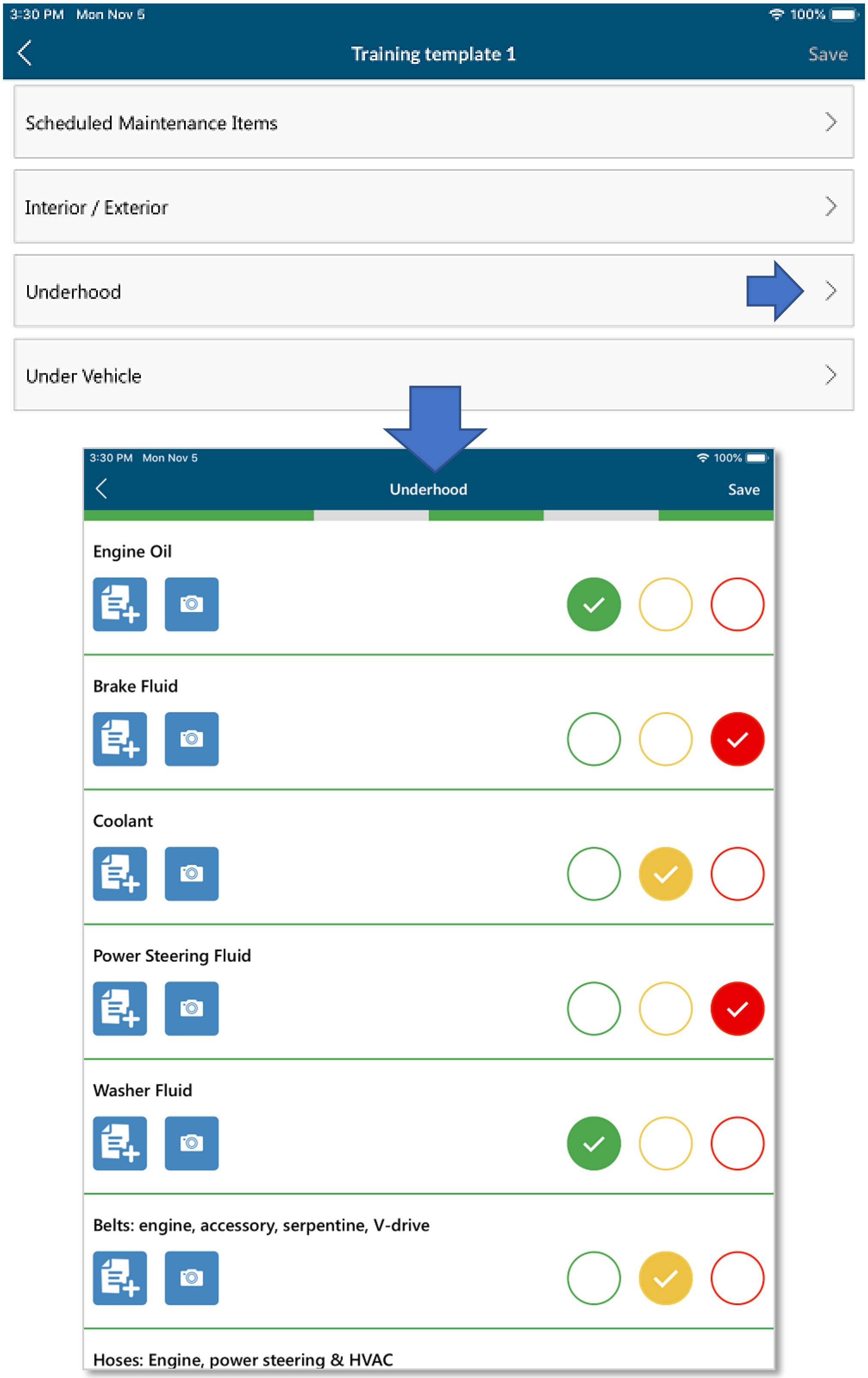
1. Start a new estimate from the mobile device or from Manager SE.
2. Tap **+ Add Item**.



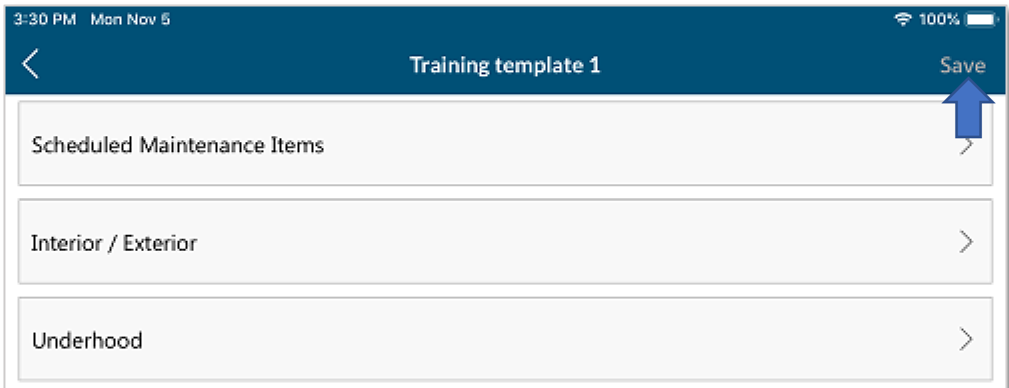
3. Tap the **MPI** category to bring down the **MPI drawer**, select the MPI to use.



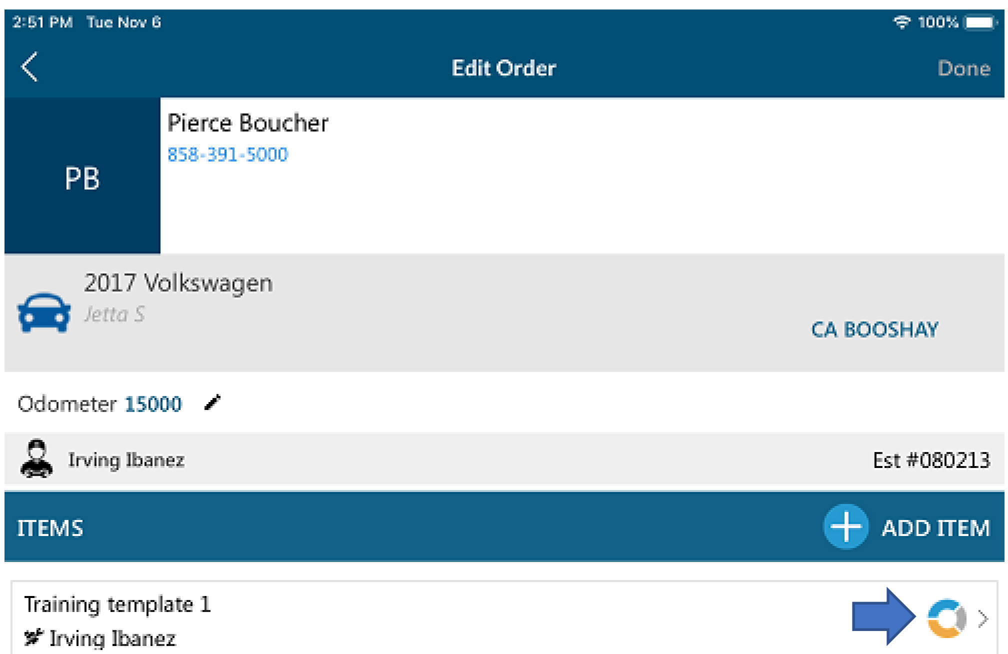
4. All **Groups** within the MPI will be displayed. Each **Group** has individual inspection **Items**.



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.

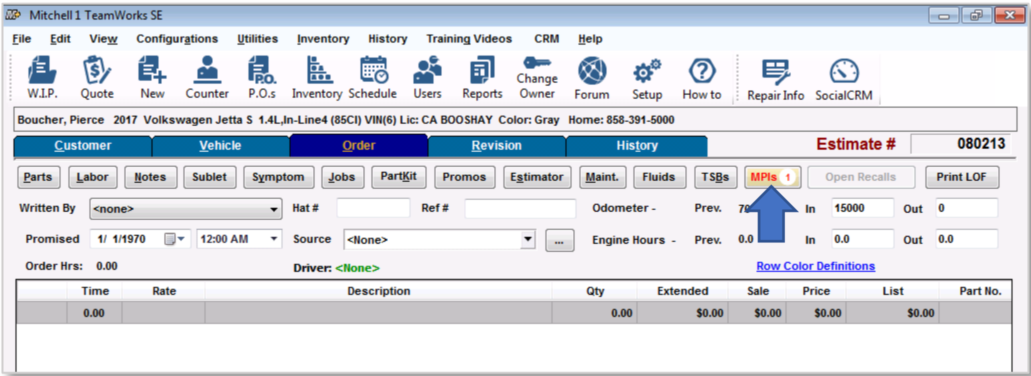


6. The inspection will be added to the order, which can be seen in both ProSpect and Manager SE.

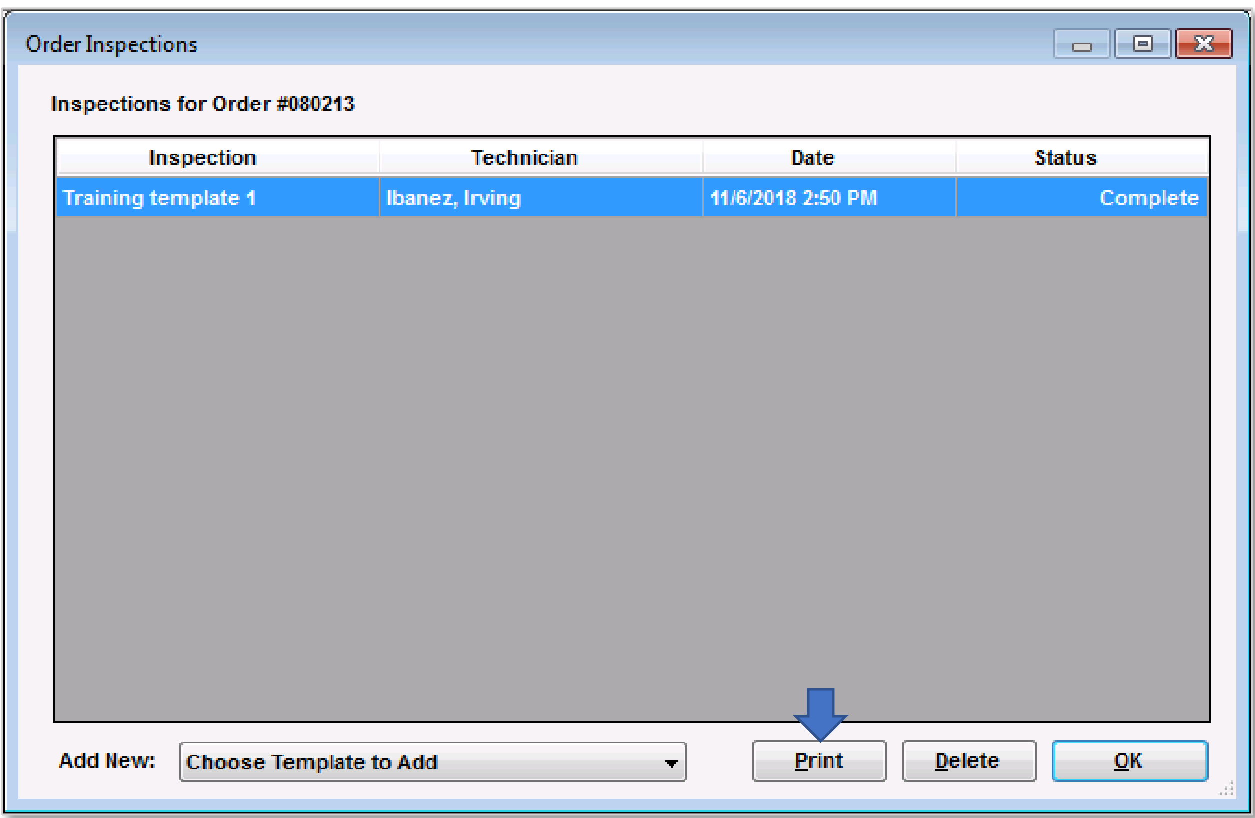


Printing Inspections from SE

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.