

# **Mitchell1 and ShopKey ProSpect**

## **User Guide**

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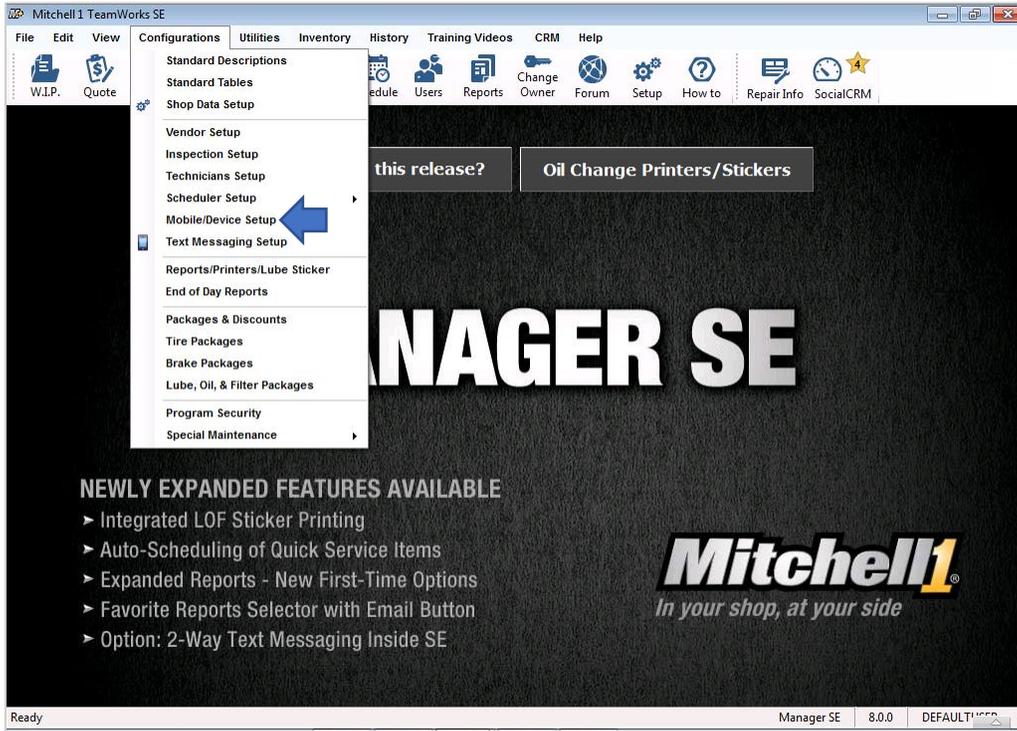
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# Requirements

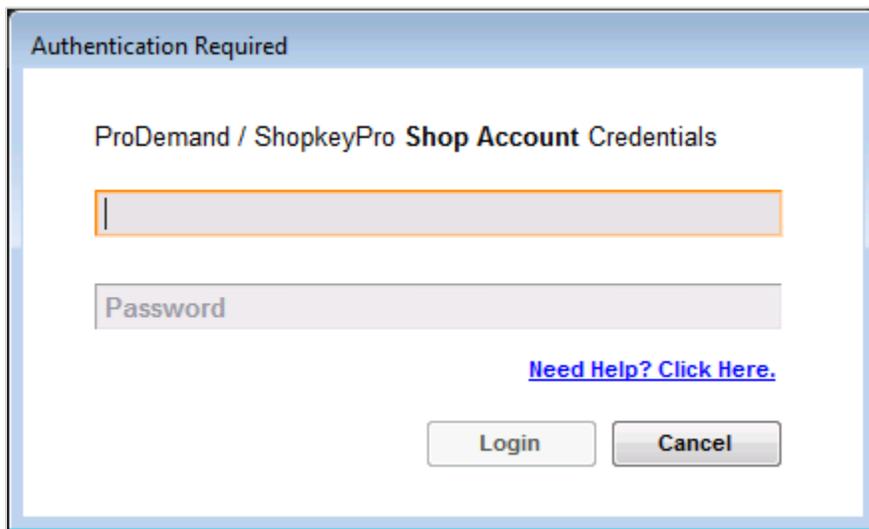
- Apple device running iOS 12 or higher
  - For a list of iOS 12 compatible devices, see [Apple's Official Page for iOS12](#)
- Ability to download and install apps from the App Store
- Wi-Fi network
- Manager SE version 8.0 or higher
  - For Manager SE system requirements, see our [Knowledgebase Article](#)

# ProSpect Setup

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

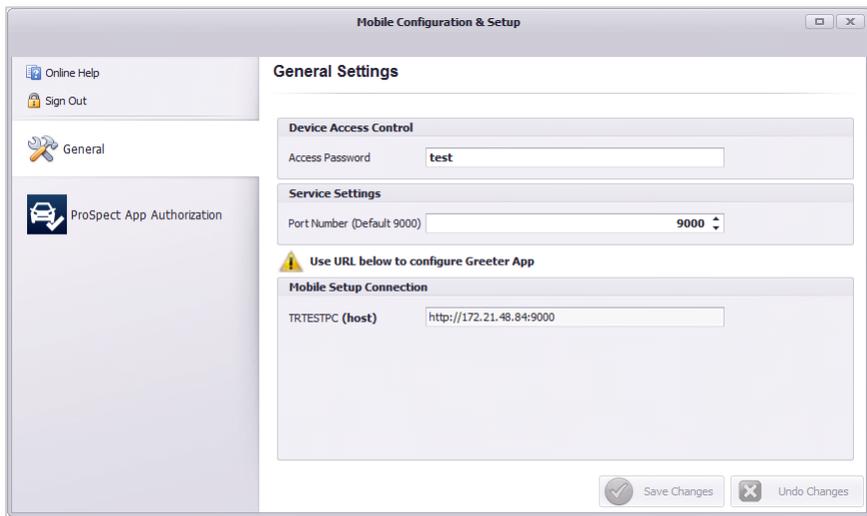


2. Enter the authorization credentials. They are the same credentials as **ProDemand/ShopkeyPro**.



- 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`

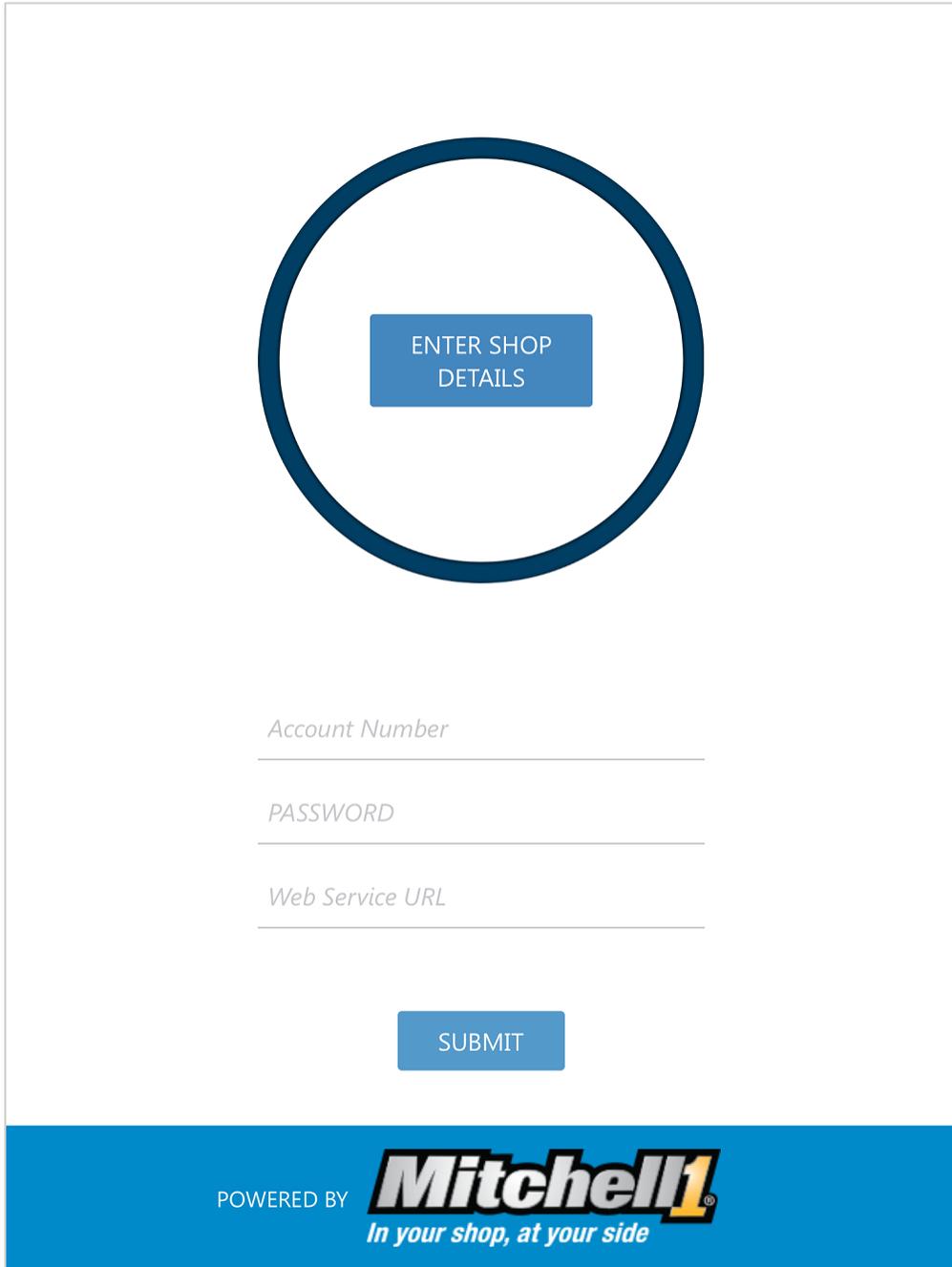


- Next, open the **ProSpect App Authorization** section.



- Download and install ProSpect from the **App Store** on the Apple device. Ensure the device is connected to the *same network* as the host computer.

6. Once it is installed, launch ProSpect to access the **Setup Screen**. Enter the **Account Number** from Manager SE. The **Password** will match the one in step 3. The **Web Service URL** will be the **full URL** from step 3 (including the “http://”).



ENTER SHOP  
DETAILS

*Account Number*

---

*PASSWORD*

---

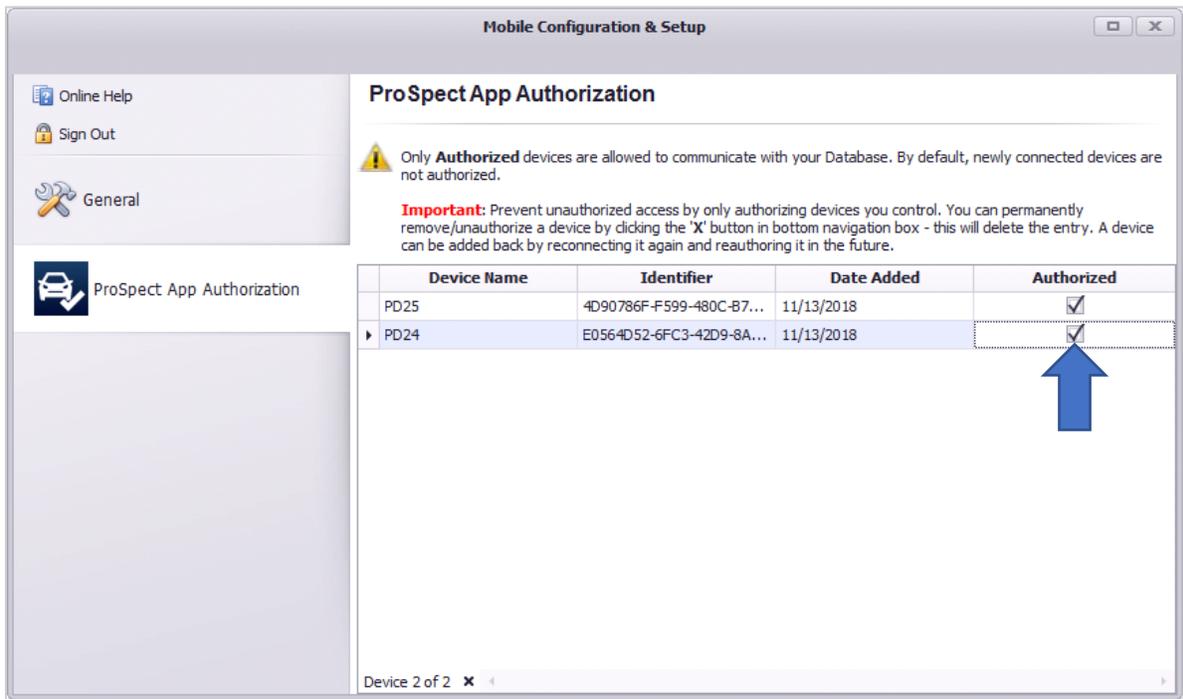
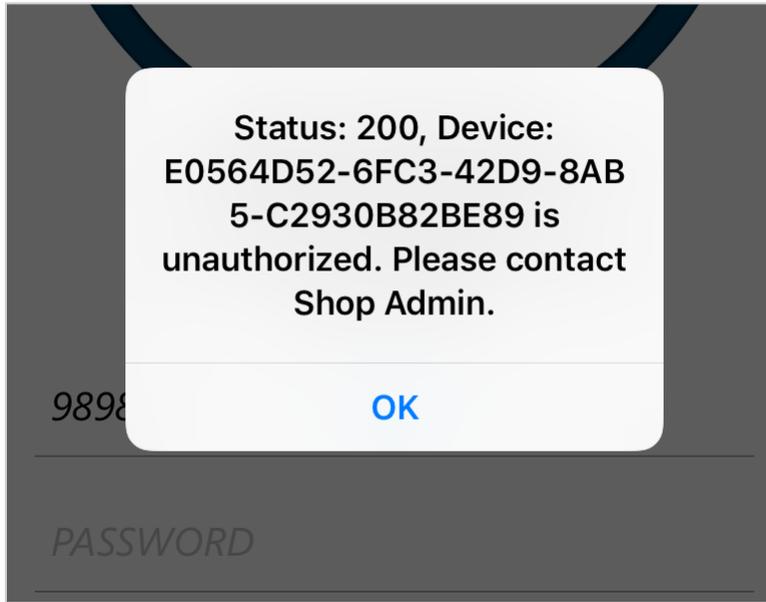
*Web Service URL*

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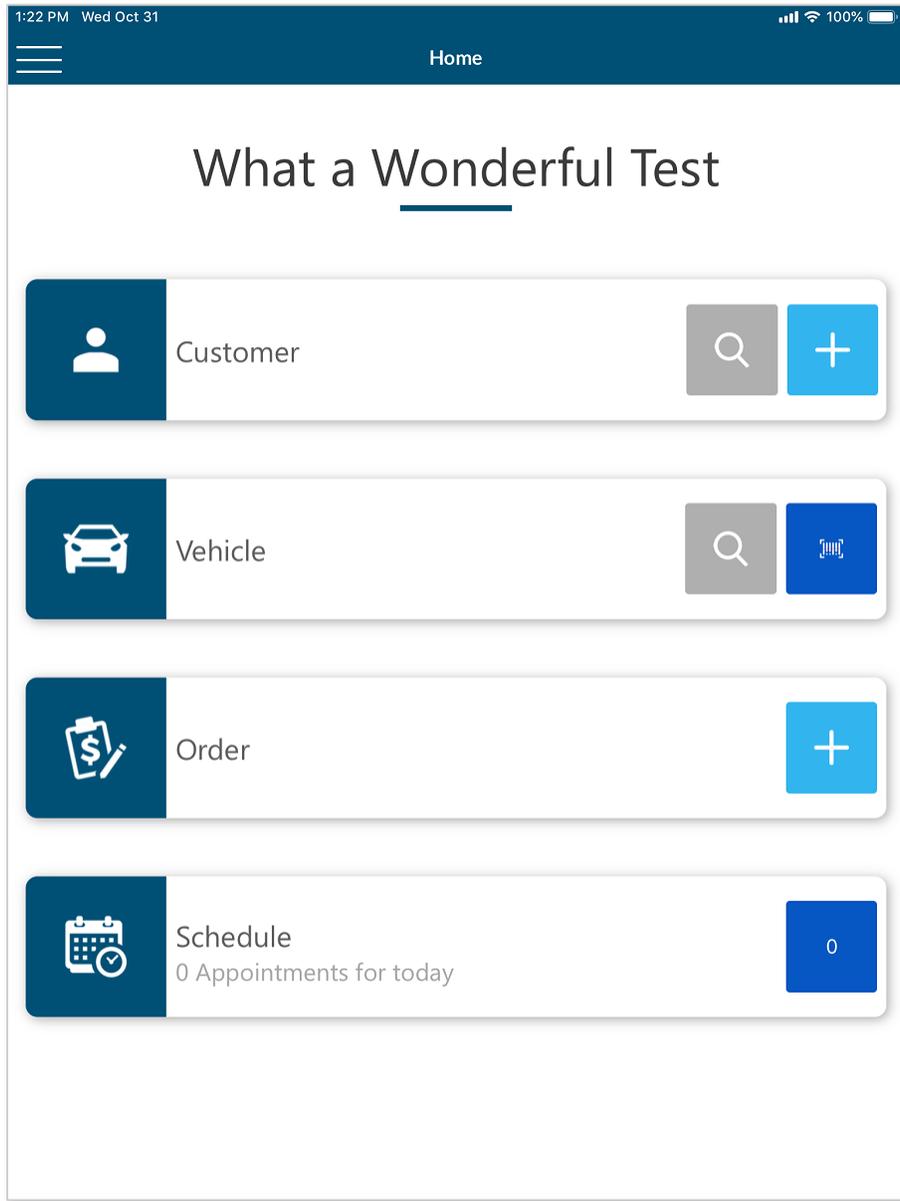
SUBMIT

POWERED BY **Mitchell1**  
*In your shop, at your side*

- After tapping **Submit**, a pop-up notice will state that the **device is unauthorized**. The device will now show in the **ProSpect App Authorization** window. Check the checkbox in the **Authorized** column. Re-enter the password and hit submit.



8. Setup complete! The **Home Screen** should display.



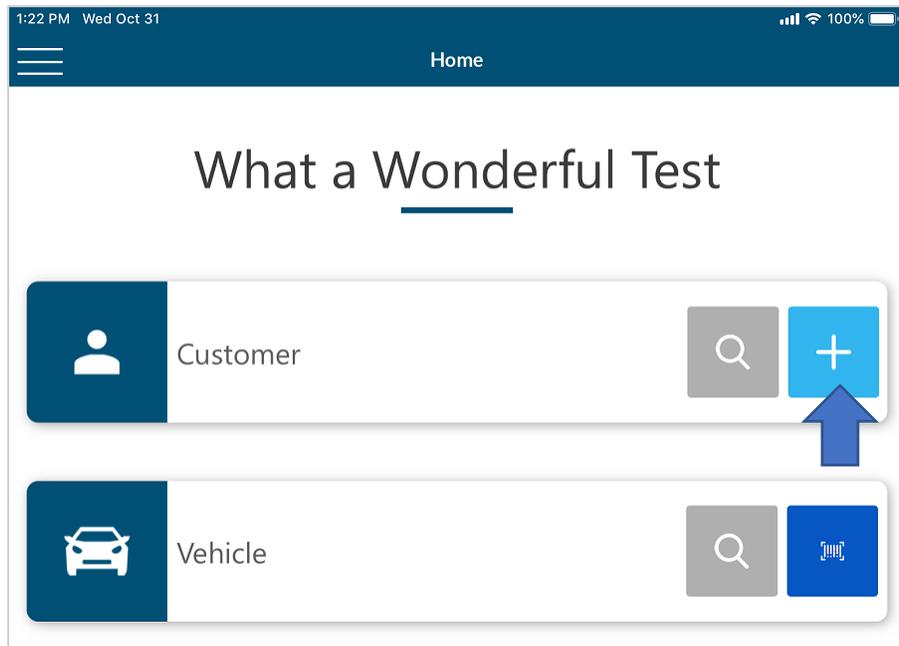
# How to Add a Customer

## Method 1: Using the License/VIN Decoder

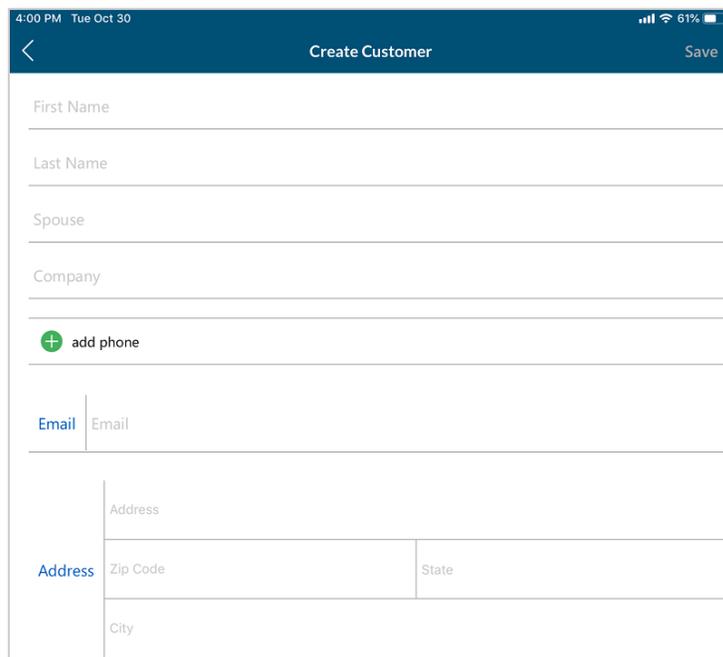
See [How to Scan a VIN Barcode or License](#)

## Method 2: The Home Screen

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



2. Enter customer information.

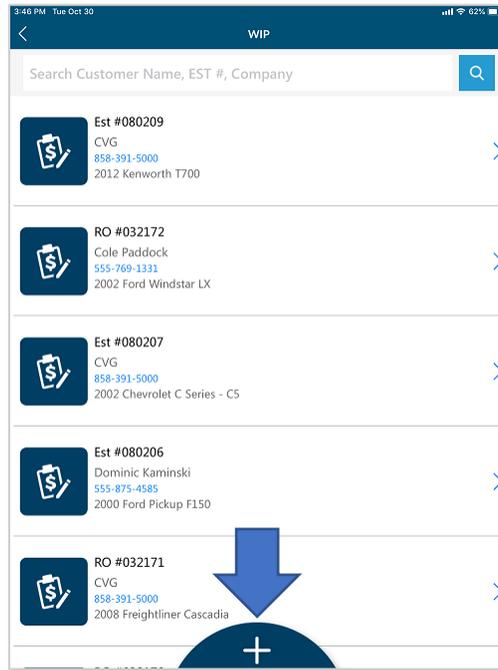
A screenshot of a mobile application's "Create Customer" form. The top status bar shows the time as 4:00 PM on Tuesday, October 30, with a 61% battery level. The app's header is dark blue with a back arrow on the left, the text "Create Customer" in the center, and a "Save" button on the right. The form contains several input fields: "First Name", "Last Name", "Spouse", and "Company". Below these is a green plus icon followed by the text "add phone". There is an "Email" section with a label "Email" and an input field. The "Address" section is divided into three rows: the first row has an "Address" label and an input field; the second row has "Address" labels for "Zip Code" and "State" with corresponding input fields; the third row has an "Address" label and an input field for "City".

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

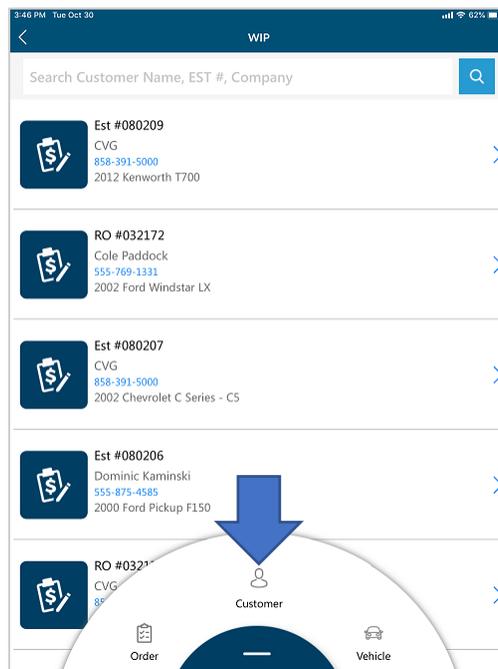
The screenshot shows a mobile application interface for creating a customer. At the top, the status bar displays '4:00 PM Tue Oct 30' and '61%' battery. The app's header is dark blue with a white back arrow on the left, the title 'Create Customer' in the center, and a 'Save' button on the right. A blue arrow points to the 'Save' button. Below the header are four text input fields labeled 'First Name', 'Last Name', 'Spouse', and 'Company'. At the bottom left, there is a green plus icon followed by the text '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

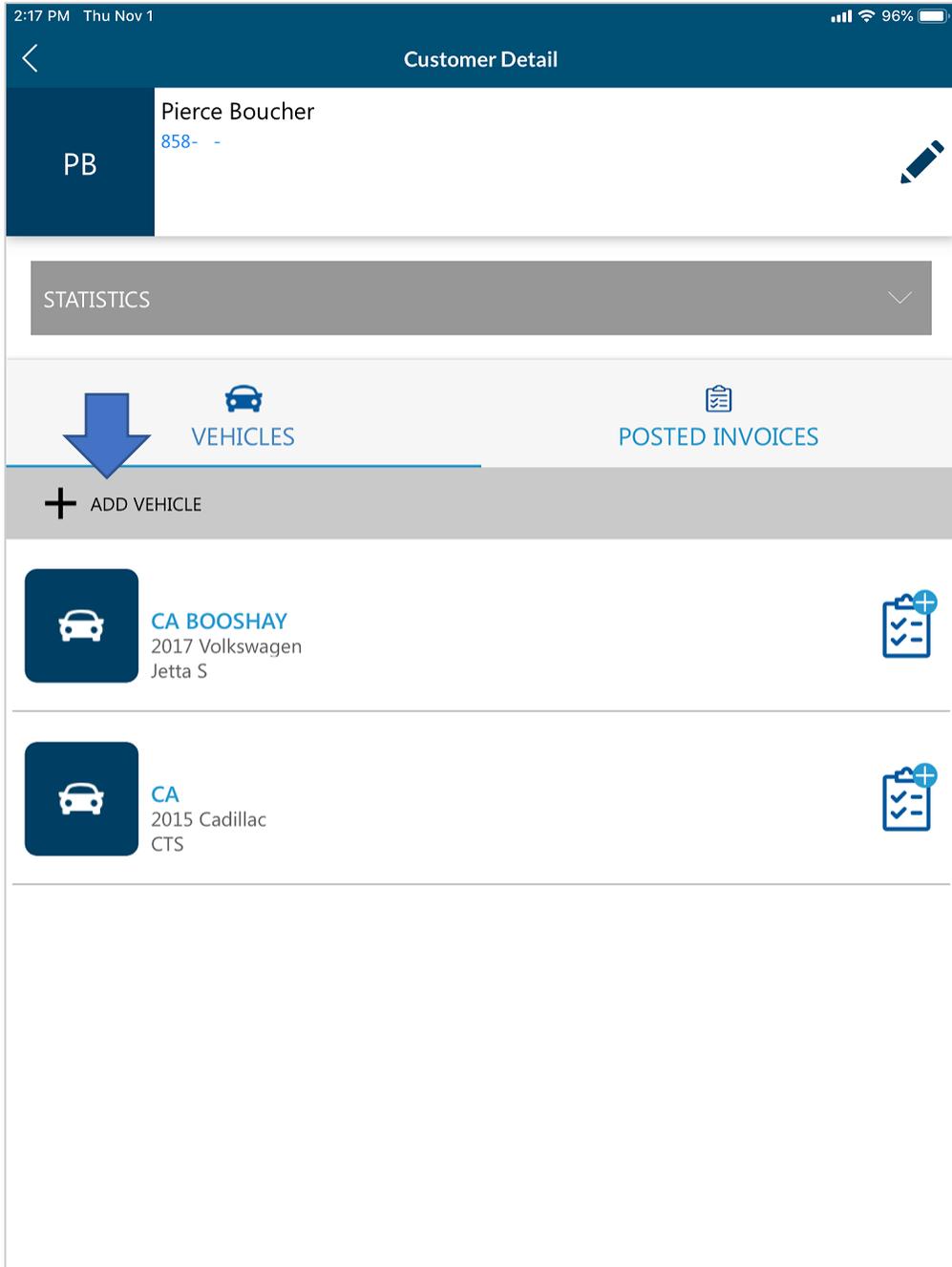
# How to Add a Vehicle to a Customer

## Method 1: Using the License/VIN Decoder

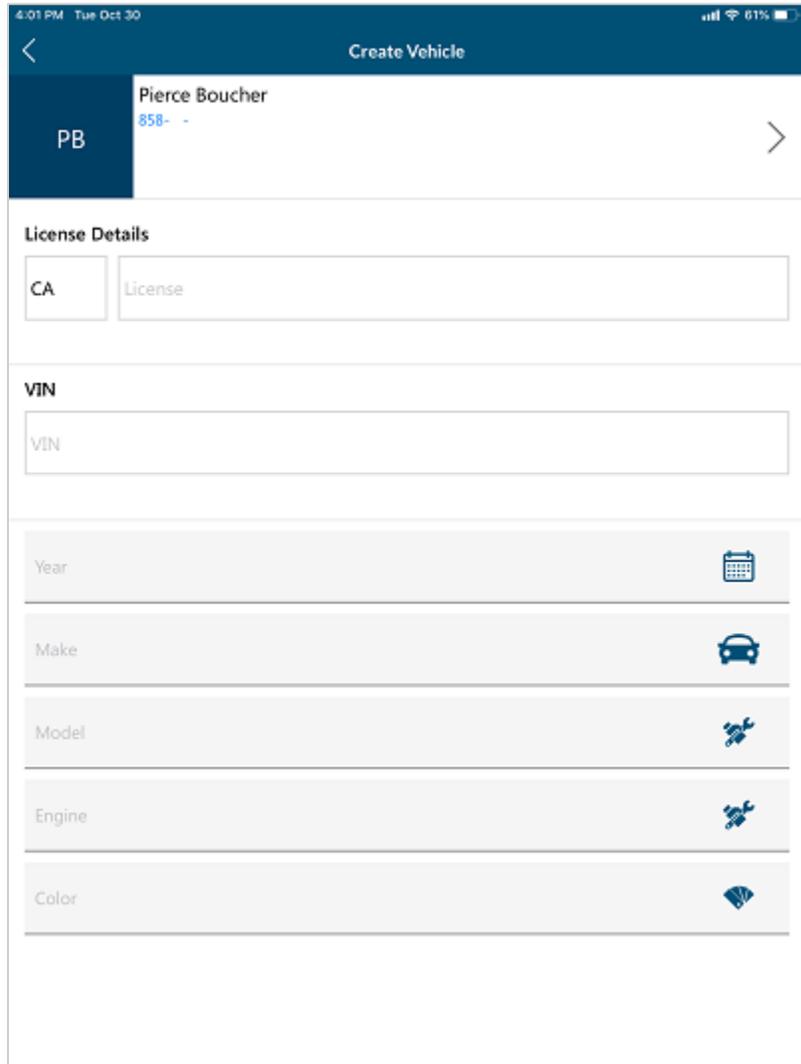
See [How to Scan a VIN Barcode or License](#)

## 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 61%

Create Vehicle

PB Pierce Boucher  
858- -

**License Details**

CA License

**VIN**

VIN

Year 

Make 

Model 

Engine 

Color 

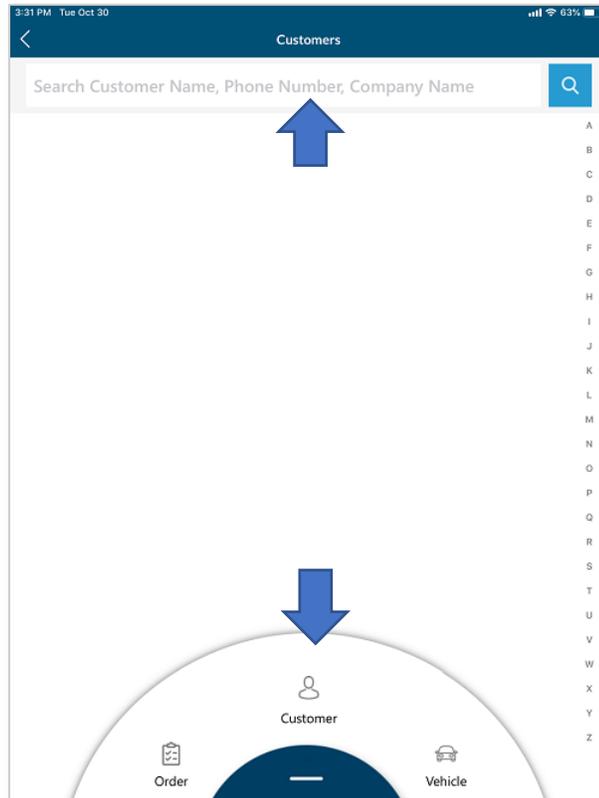
# How to Look Up a Customer

## Method 1: Using the License/VIN Decoder

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

## Method 2: Customers Screen

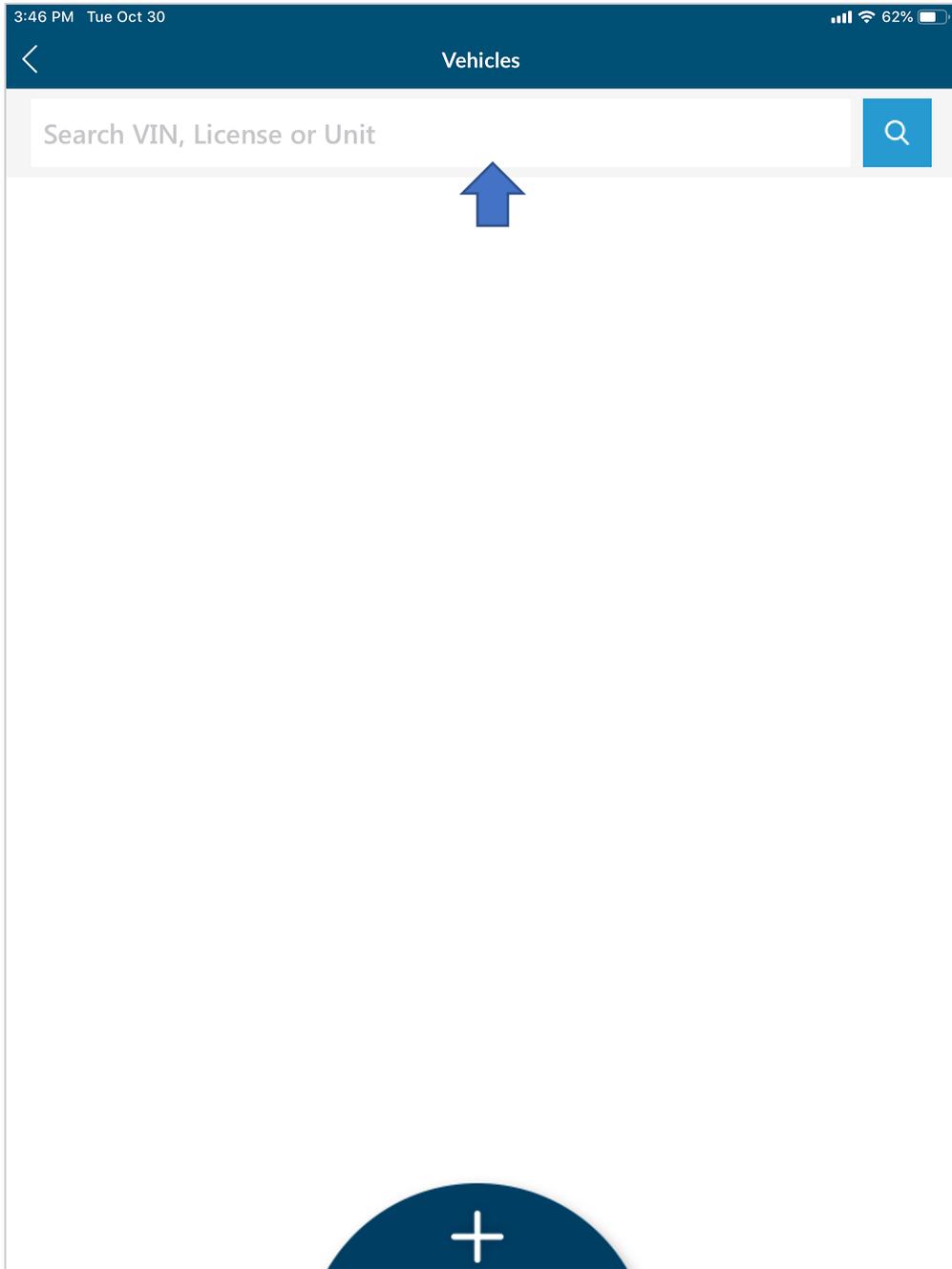
1. Tap the customer icon  on the **Home** screen.
2. Tap **Customer** in the + **Menu** or search for them in the **Search Box**.



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

### Method 3: Vehicles Screen

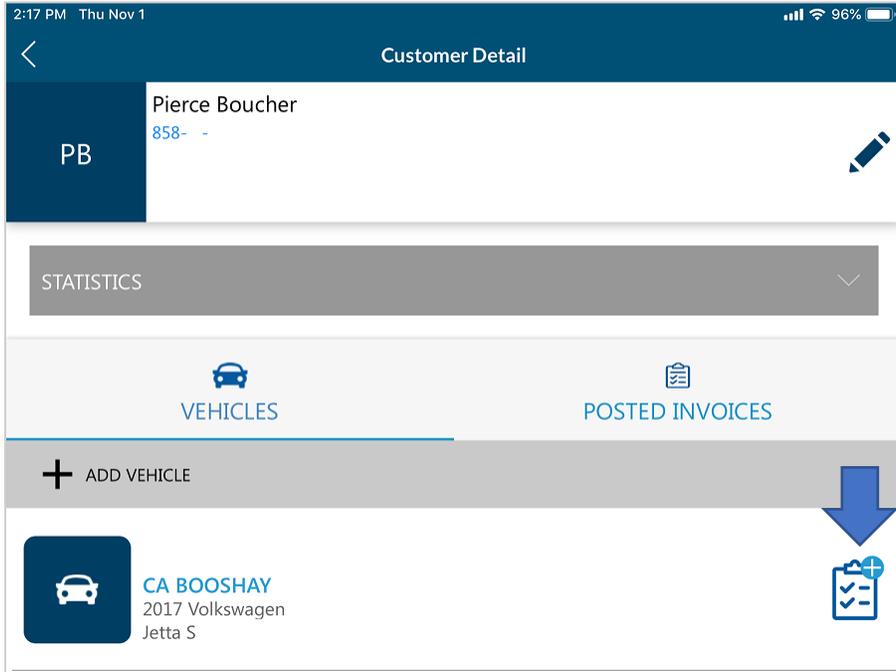
1. Tap the vehicle icon  on the **Home** screen.
2. Search by **VIN, License Plate, or Unit number**.



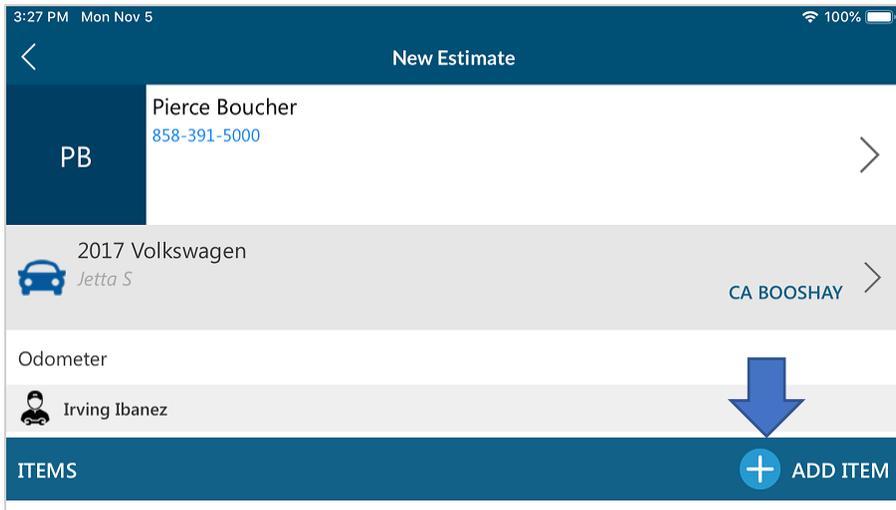
3. This opens the **Customer Detail** screen.

# How to Create an Estimate

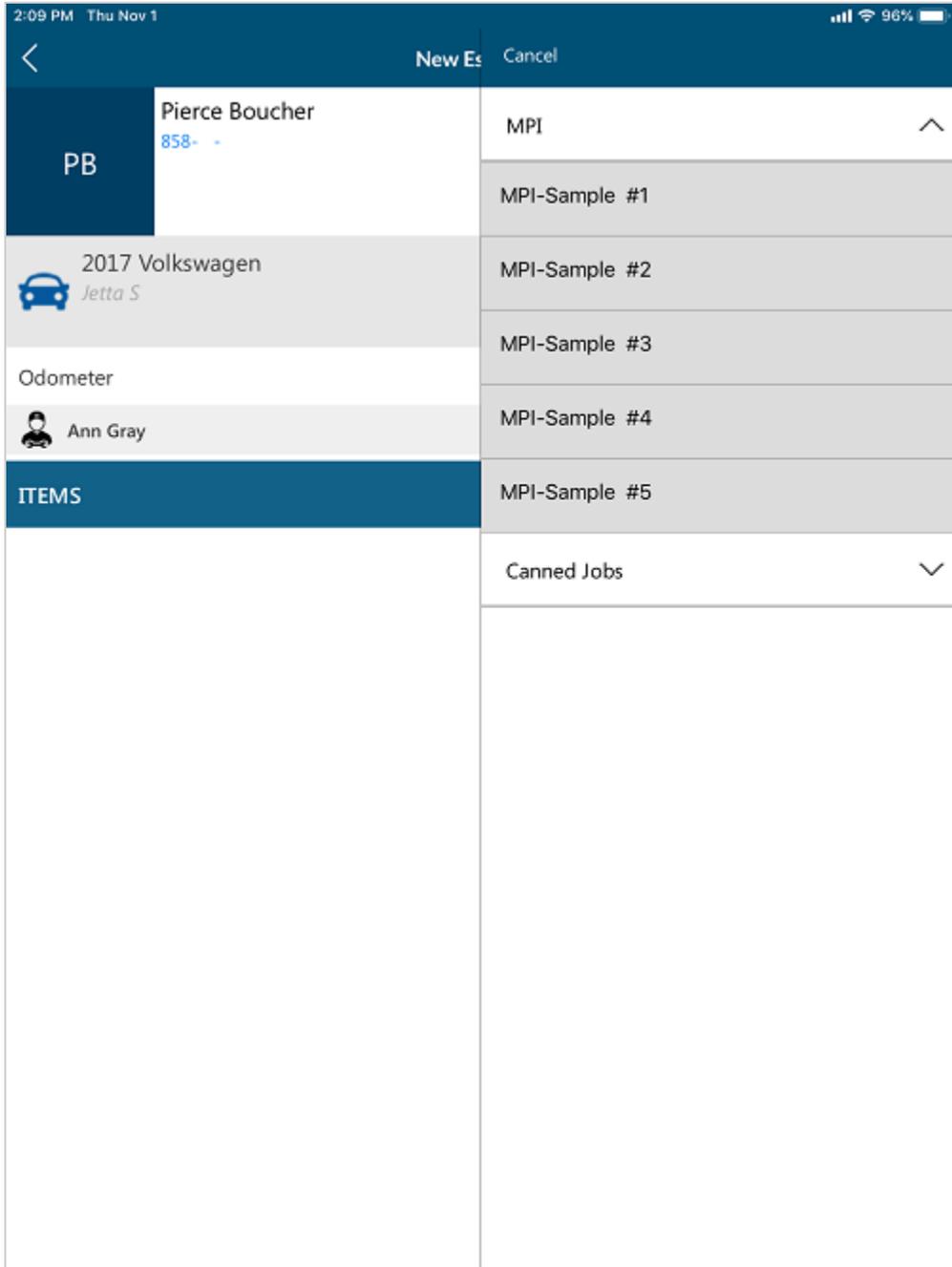
1. Select a customer; this will open the **Customer Detail** screen.
2. To start an **Estimate** for a vehicle, tap the **blue clipboard**  beside it.
  - a. If any orders already exist for that vehicle, a number will display on the clipboard icon,  and a prompt will show to select an existing order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

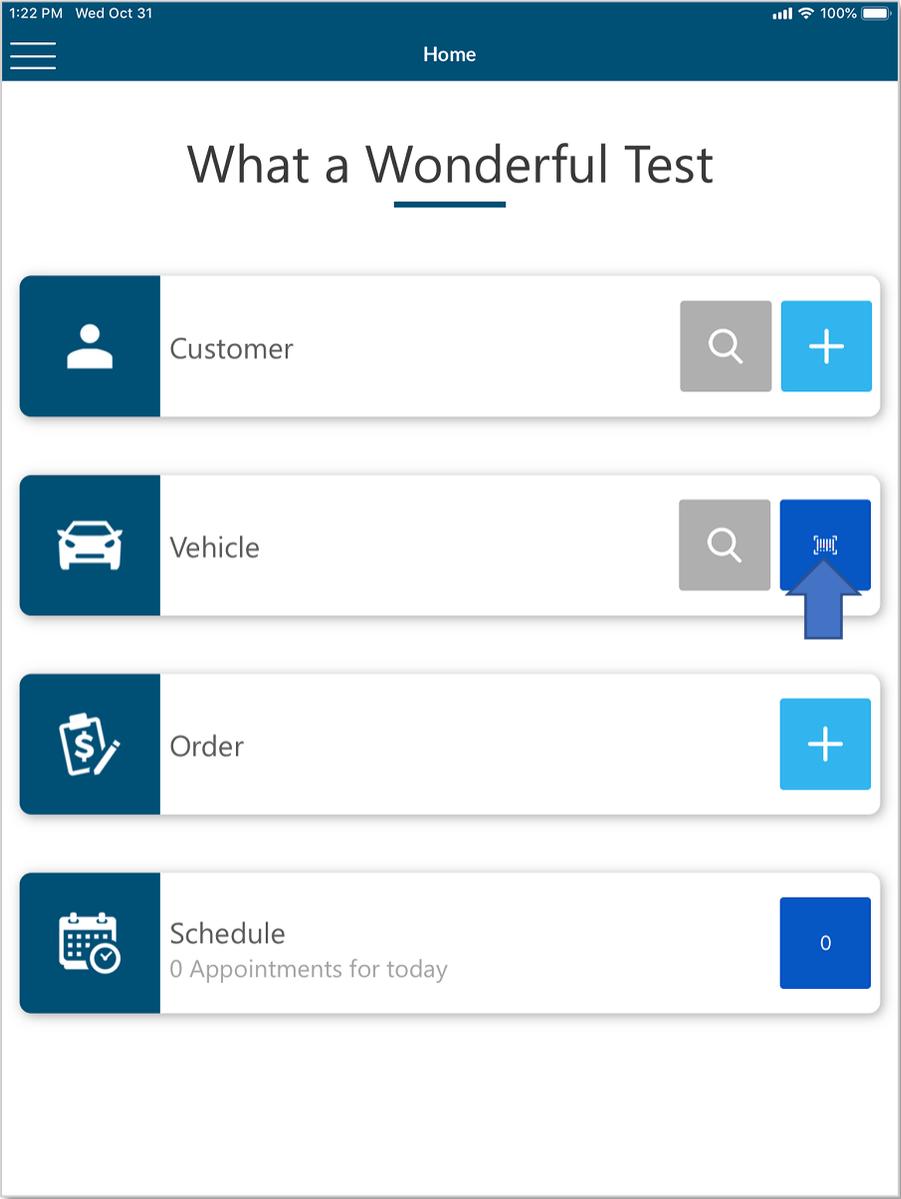


5. Add mileage and select technician.

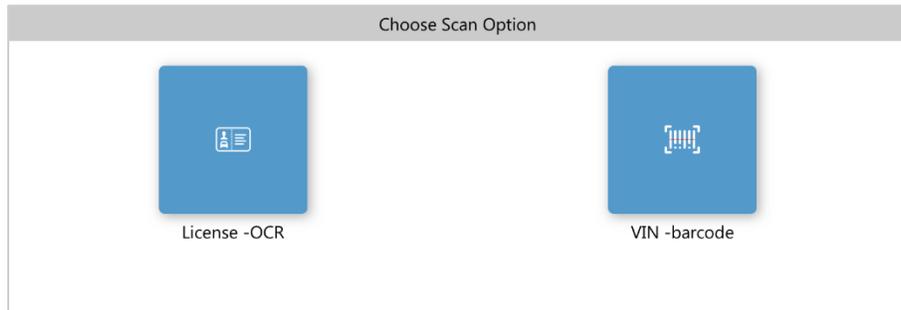
The screenshot displays a mobile application interface. At the top, there are two tabs: 'ITEMS' and 'MPI-Sample #5'. Below the tabs, there is a form with a text input field containing '15000' and a dropdown menu labeled 'Select Technician'. A dialog box is open in the foreground, titled 'Select Technician' with a close button (X) in the top right corner. The dialog box contains a list of names: 'Irving Ibanez', 'SELECT PLEASE', 'Rich Redeker', and 'Ricardo Riddell'. The background form also shows a 'Plate 1' label and a dropdown arrow.

# 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

- 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.



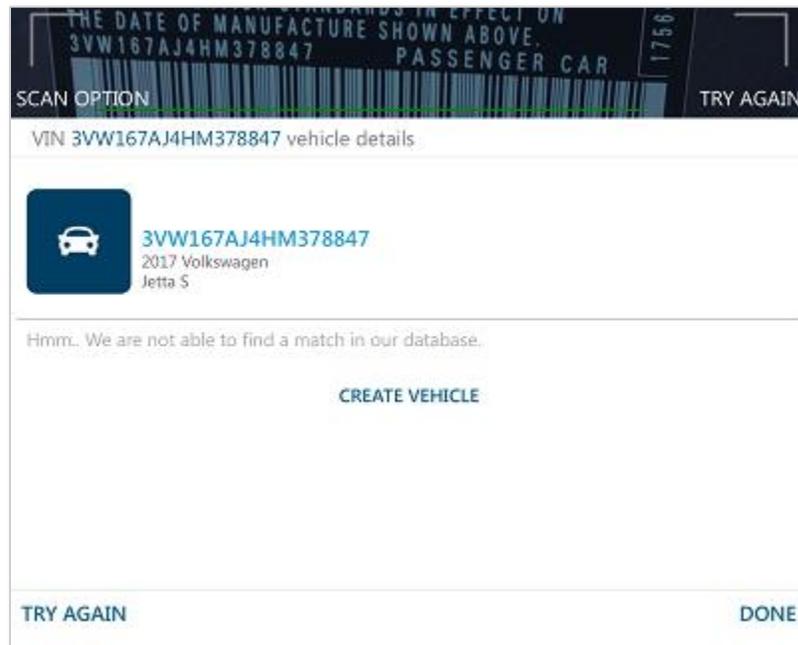
- Tap either the vehicle pulled from the database, or **Create Vehicle** to start adding it to a customer.

## 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.



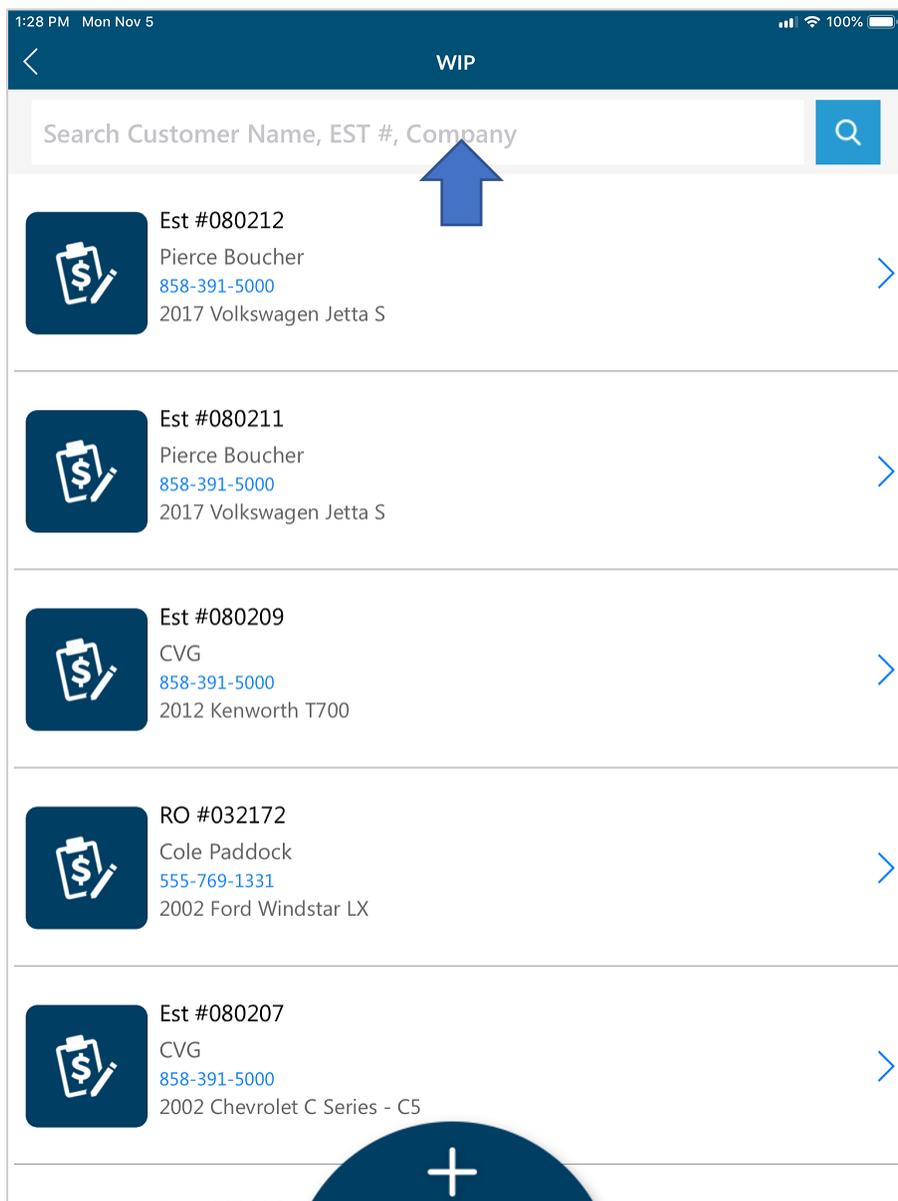
4. Tap either the vehicle pulled from the database, or **Create Vehicle** to begin adding it to a customer.

# Viewing Existing Orders

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

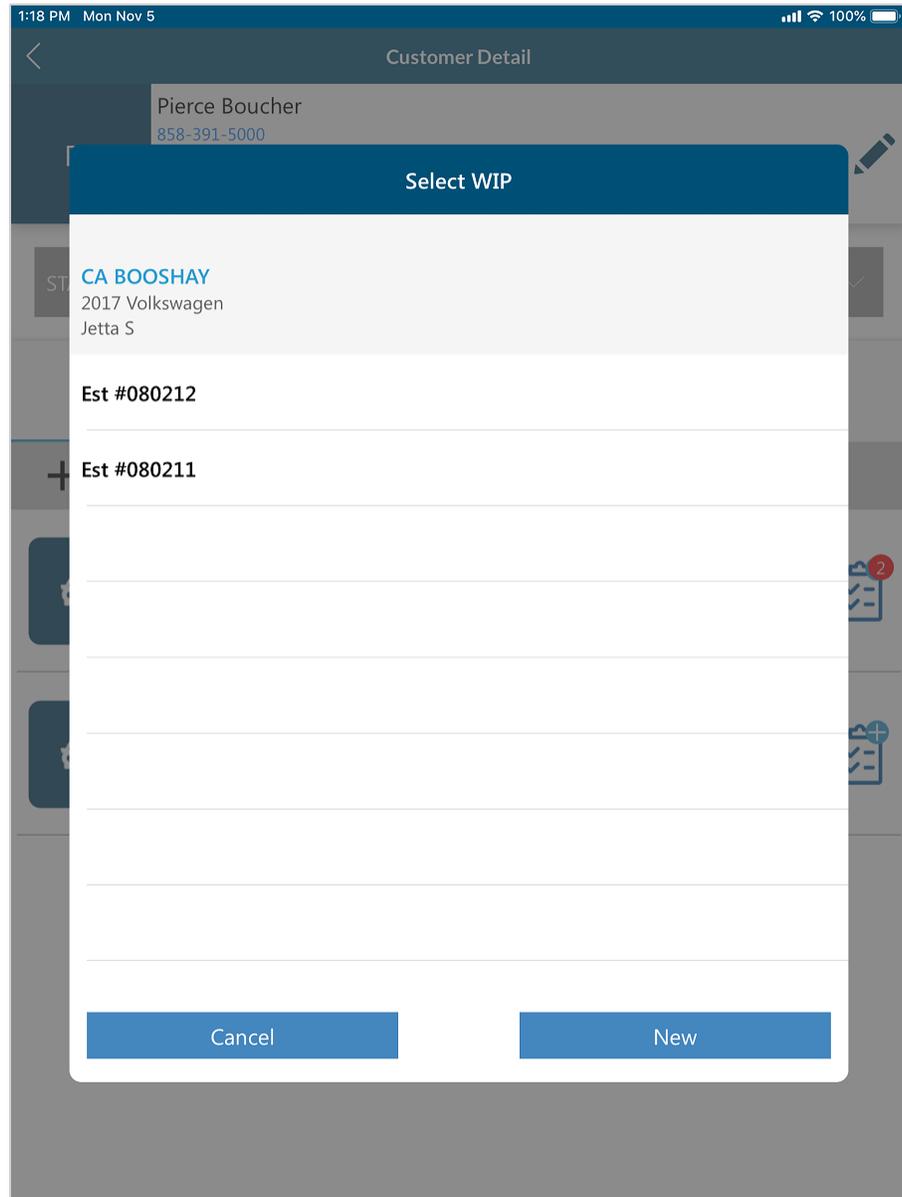
## From WIP

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**.



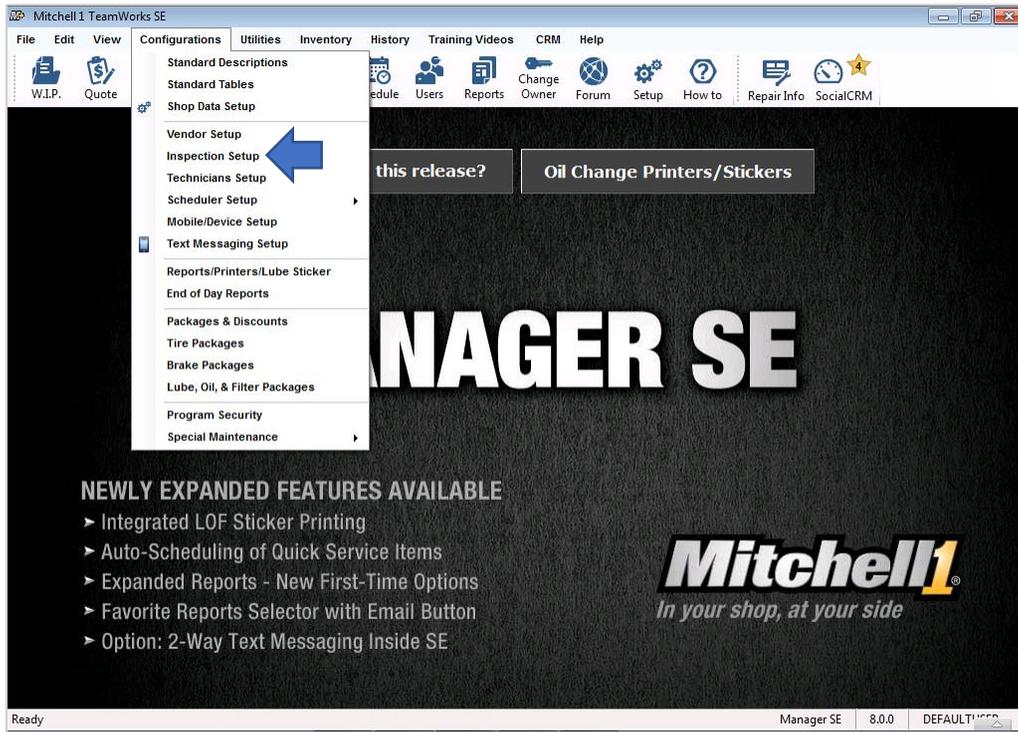
## From the Customer Detail Screen

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**.

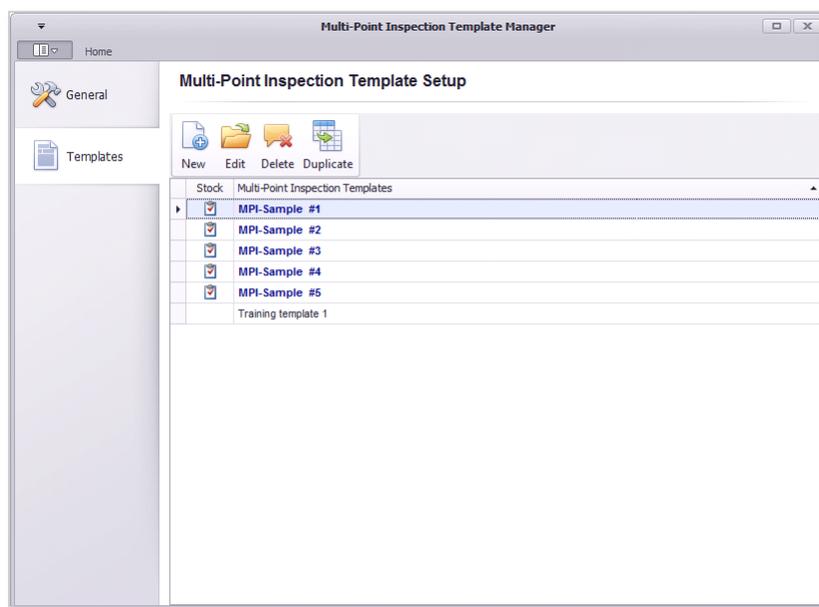


# Creating Inspection Templates

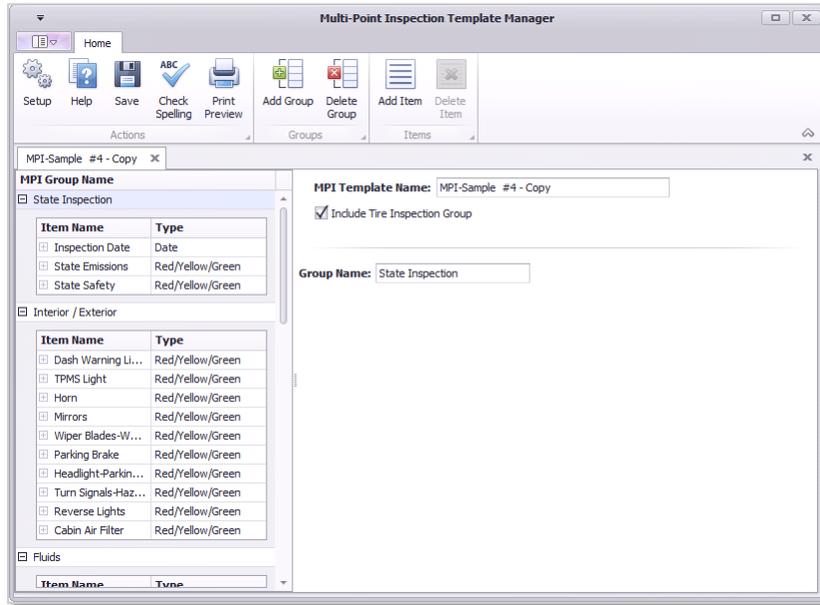
1. Open **Manager SE**. Click **Configurations** in the top left, and select **Inspection Setup** from the menu.



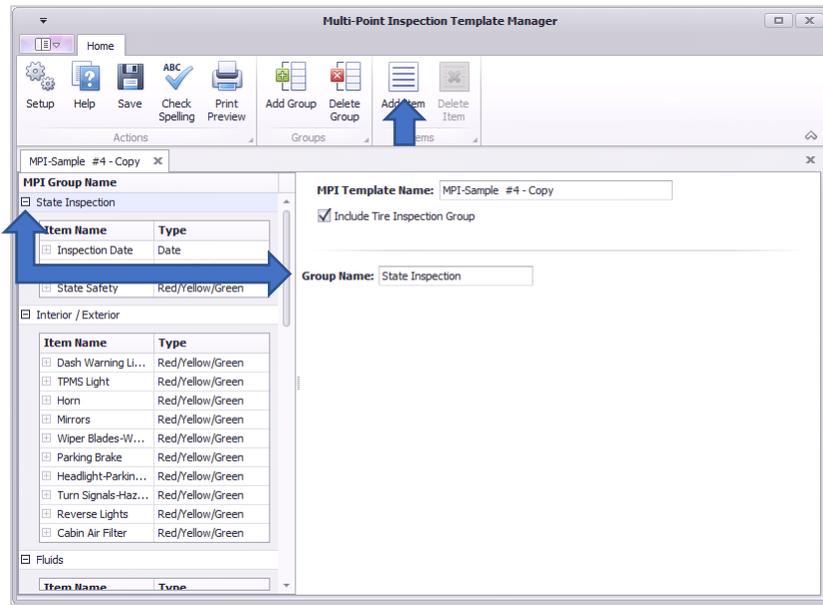
2. **Multi-Point Inspections (MPI)** can be edited or added here.
  - a. The default sample templates **must be duplicated to be edited**.



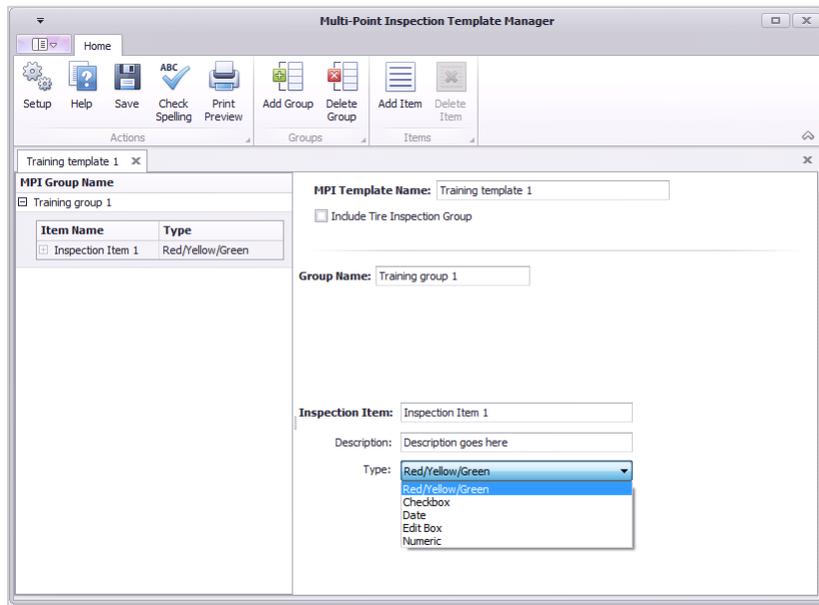
- Click **NEW** and enter a name for the template. If desired, check the **Include Tire Inspection Group** box. To add a new group of inspection items, click **Add Group**.



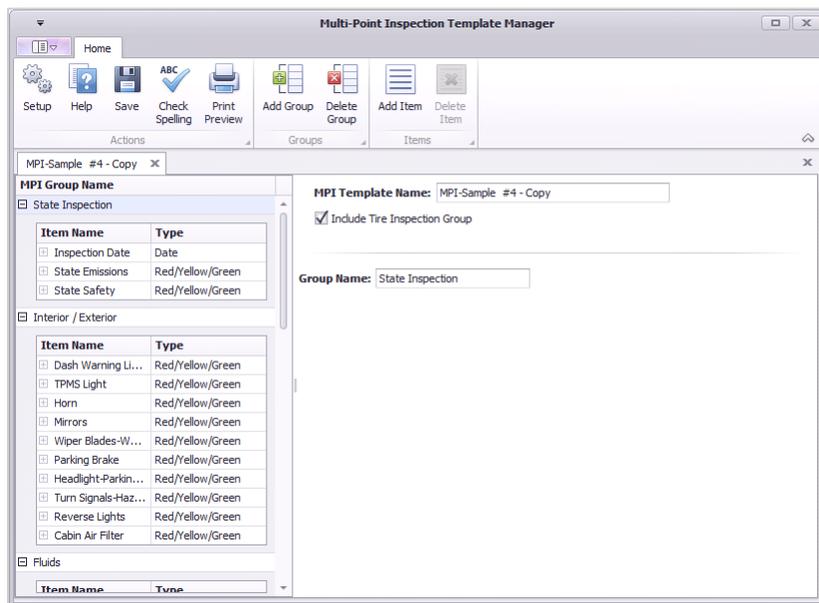
- On the left, the new group is added. Tap the small **+** **Button** next to the group name. Here a name can be assigned to the group and **Items** may be added.



- 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.

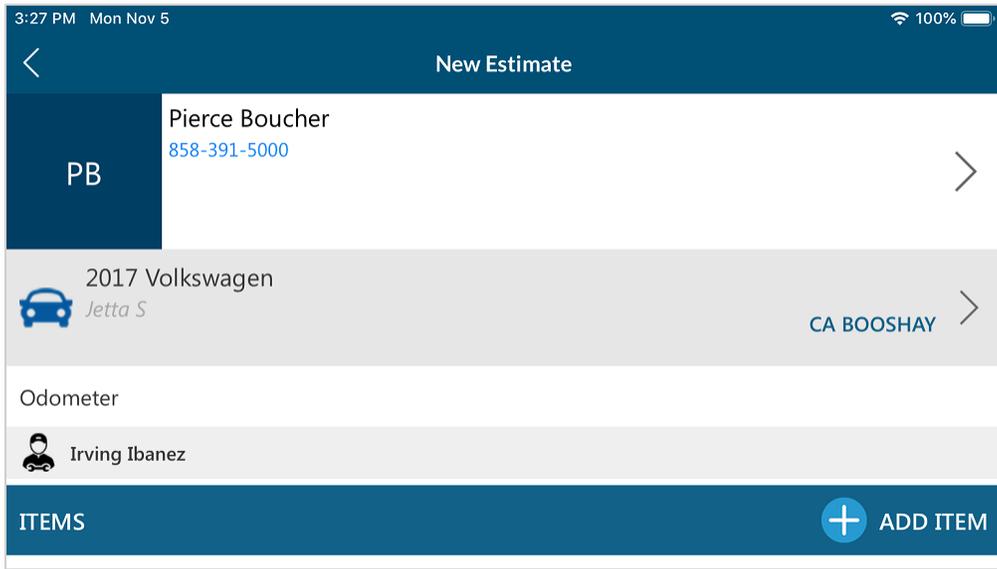


- Once items have been added, the MPI should something look like this, with multiple **Groups**, and multiple **Items** in each **Group**:

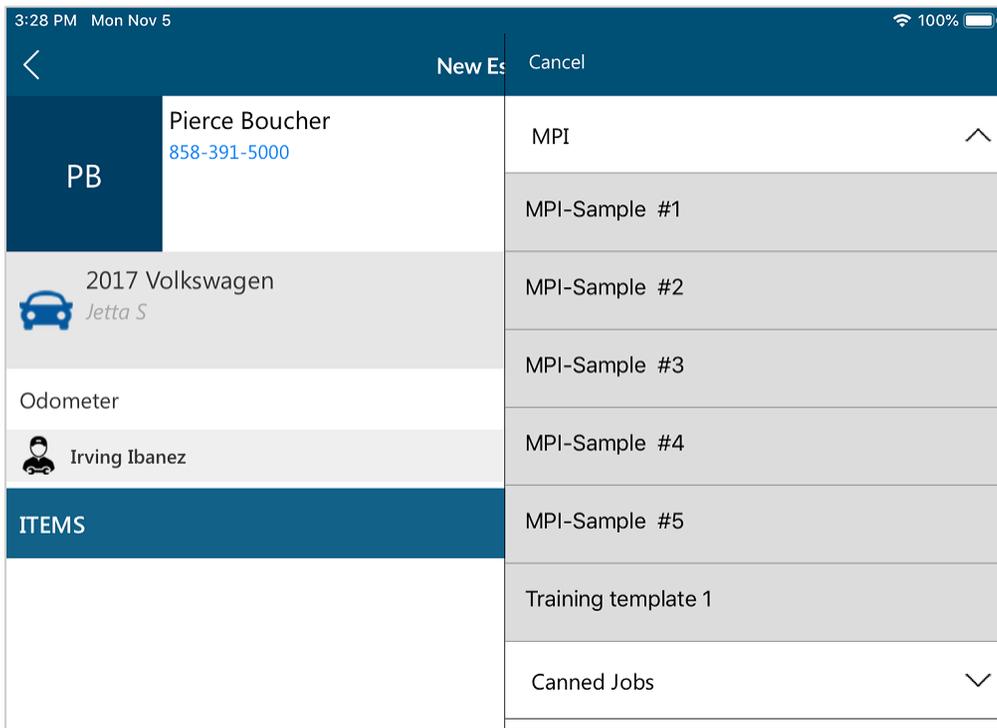


# Adding an Inspection to an Order

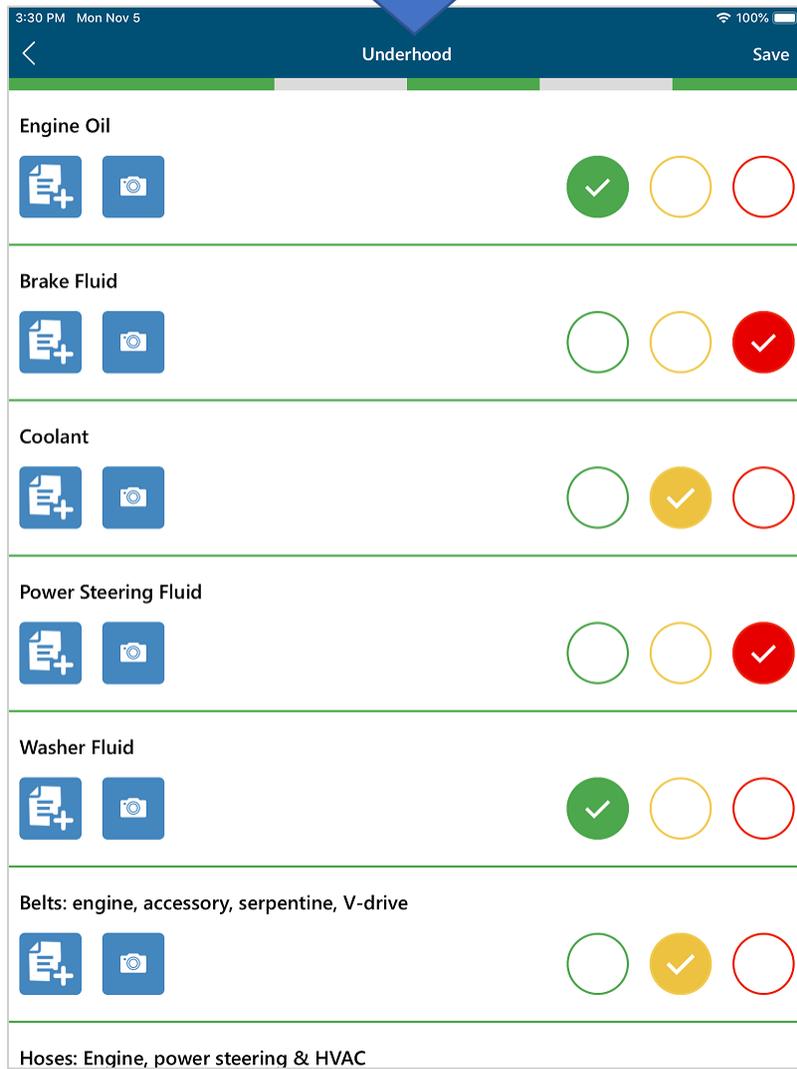
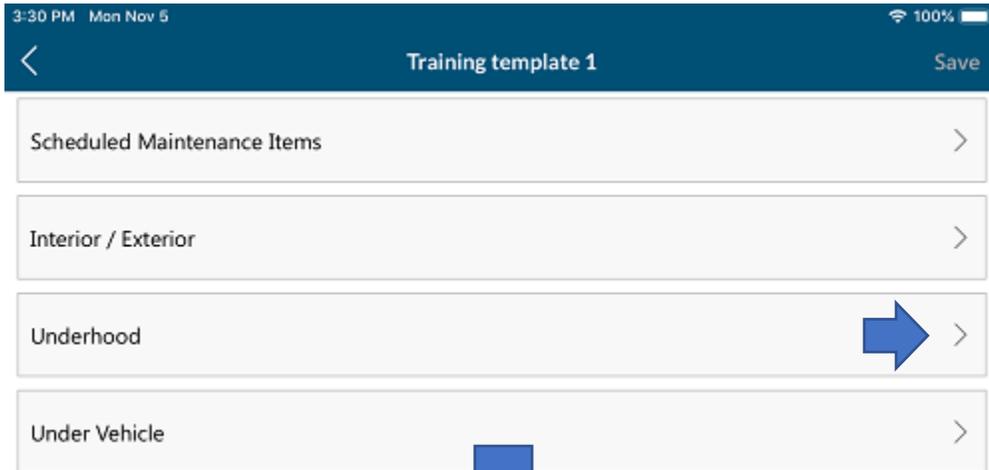
1. Start a new estimate from the tablet or from Manager SE.
2. Tap **+ Add Item**.



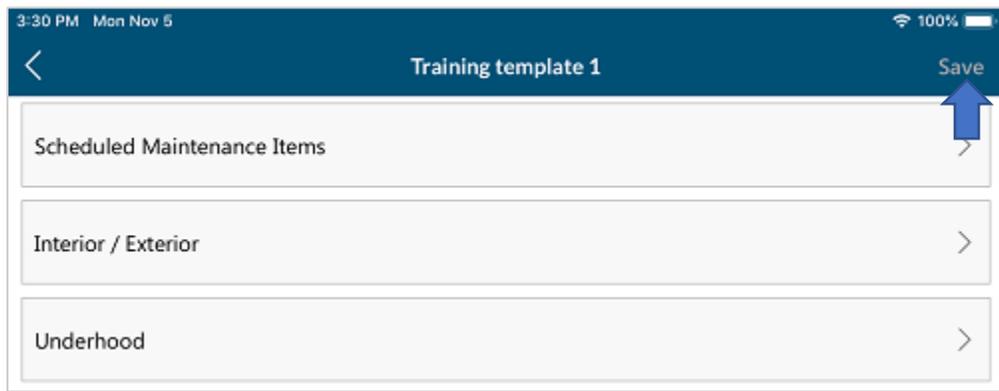
3. Tap the **MPI** category to bring down the **MPI drawer**, select the MPI to use.



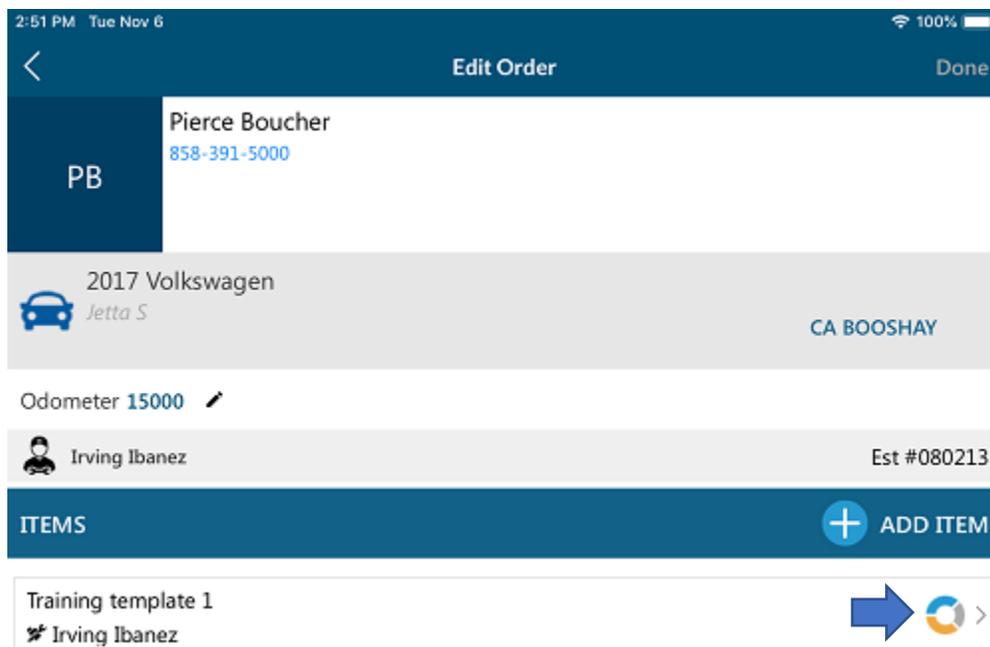
4. All **Groups** within the MPI will be displayed. Each **Group** has individual inspection **Items**.



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.

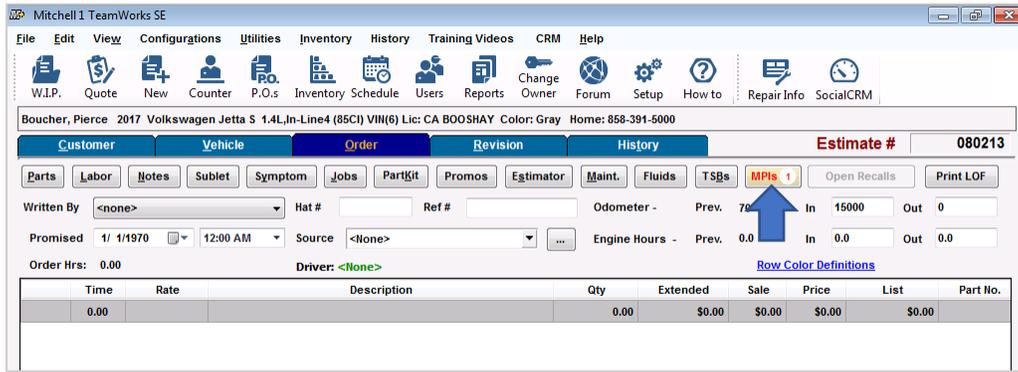


6. The inspection will be added to the order, which can be seen in both ProSpect and Manager SE.

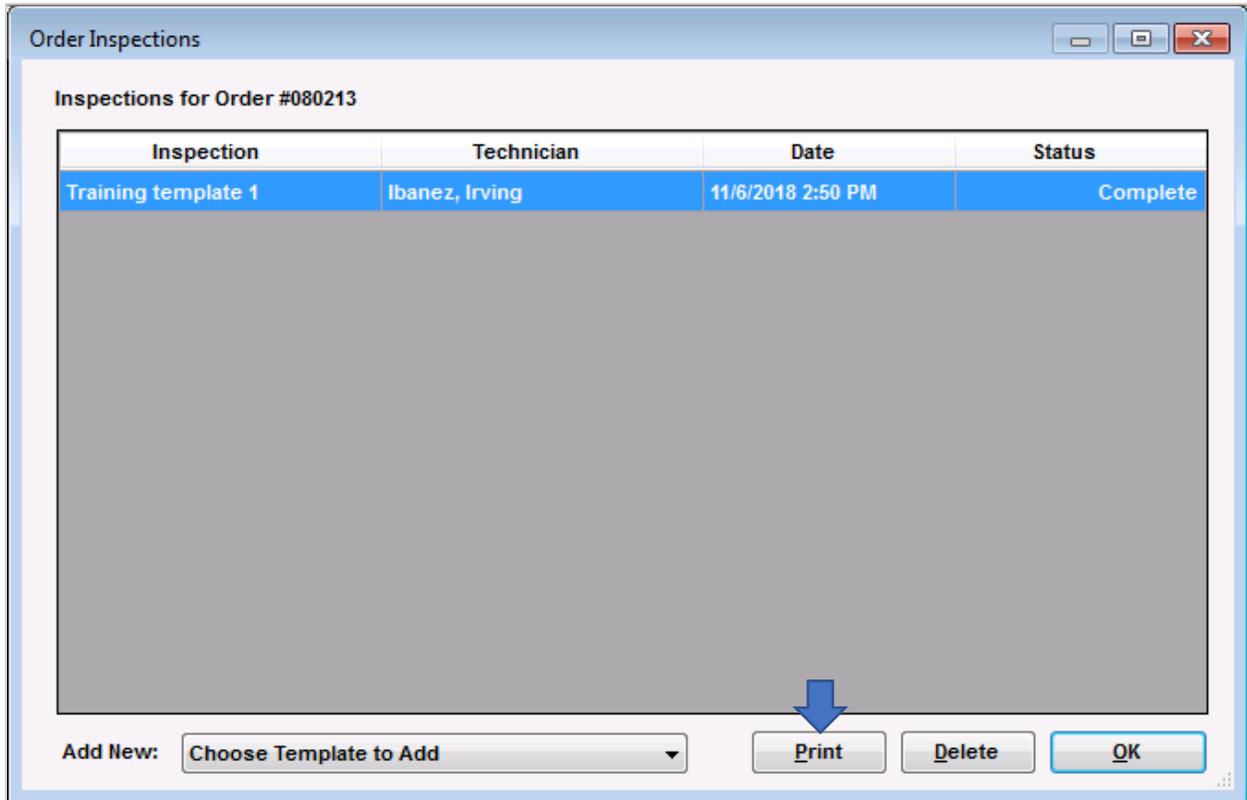


# Printing Inspections from SE

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.

