# Mitchell1 and ShopKey ProSpect

**User Guide** 

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## Requirements

- Apple device running iOS 12 or higher
  - For a list of iOS 12 compatible devices, see <u>Apple's Official Page for iOS12</u>
- Ability to download and install apps from the App Store
- Wi-Fi network
- Manager SE version 8.0 or higher
  - o 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**.

Authentication Required
ProDemand / ShopkevPro Shop Account Credentials
Password
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

	Mobile C	onfiguration & Setup		
😨 Online Help	General Settings			
General	Device Access Contr Access Password	ol test		
ProSpect App Authorization	Service Settings		,	
	Port Number (Default 90	o configure Greeter App	9000 🖵	
	Mobile Setup Connec	ction		
	TRTESTPC (host)	http://172.21.48.84:9000		
			Save Changes	Undo Changes

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



5. 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.

 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://").



7. 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.



		Mobile Co	nfiguration & Setup		
👔 Online Help	ProSpect App Authorization				
🗿 Sign Out	Only Authorized devices are allowed to communicate with your Database. By default, newly connected devices are				
Ceneral		Important: Prevent u remove/unauthorize a d can be added back by re	nauthorized access by only autho levice by dicking the ' <b>X</b> ' button in econnecting it again and reauthor	rizing devices you control. You bottom navigation box - this wil ing it in the future.	can permanently Il delete the entry. A device
		Device Name	Identifier	Date Added	Authorized
Prospect App Authonization		PD25	4D90786F-F599-480C-B7	11/13/2018	$\checkmark$
	•	PD24	E0564D52-6FC3-42D9-8A	11/13/2018	
					T
		avies 2 of 2 💌			

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.

1:22 PM Wed Oct 31	Home		ull 🗢 100% 🔲
	What a Wonderful Te	est	
<b>.</b>	Customer	Q	+
	Vehicle	Q	Jui(

2. Enter customer information.

00 PM Tue O	ct 30		<b>111 🗢 61% 💷</b>
		Create Customer	Save
First Nam	e		
Last Name	9		
Spouse			
Company			
🕂 add j	bhone		
Email Er	mail		
	Address		
Address	Zip Code	State	
	City		

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

4:	00 PM Tue Oct 30		<b>II 奈</b> 61% 🔲
<		Create Customer	Save
	First Name		
	Last Name		
	Spouse		
	Company		
_	eff 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.

0 PM Tue O	ct 30			atl 🗢 61% 🔳		
7 X		Create Custom	er	Save		
First Nam	e					
Last Name	ast Name					
Spouse						
Company						
🕂 add j	phone					
Email Er	mail					
Address	Zip Code		State			
	City					

4. Tap **Save** when finished.

4:00 PM Tue Oct 30		atl 🗢 61% 💷
<	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.

2:17 PM Thu Nov	1		<b>!! 🗢</b> 96% 🗩
<	Customer Detail		
РВ	Pierce Boucher 858		
STATISTICS	5		$\checkmark$
	VEHICLES	窟 POSTED INVOICES	
+ ADD V	'EHICLE		
	<b>CA BOOSHAY</b> 2017 Volkswagen Jetta S		<del>ري</del> ۲
	<b>CA</b> 2015 Cadillac CTS		<mark>₹</mark>

- 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	ad 🕈 61% 💼
<	Create Vehicle	
РВ	Pierce Boucher 858	>
License Det	ails	
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.
- 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, sing and a prompt will show to select an existing order or create a new order.

2:17 PM Thu Nov	1		nil 🗢 96% 🗔
<	Custom	er Detail	
РВ	Pierce Boucher 858		
STATISTICS	6		$\sim$
	VEHICLES	) POSTED INVOICES	
+ ADD V	EHICLE		
	CA BOOSHAY 2017 Volkswagen Jetta S		

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

3:27 PM Mon Nov	5	🗢 100% 🥅
<	٢	lew Estimate
PB	Pierce Boucher 858-391-5000	>
2017 V Jetta S	olkswagen	ca booshay >
Odometer		
💄 Irving Ibar	nez	
ITEMS		ADD 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			atl 🗢 96% 🔲
<	New Es	Cancel	
Pierce Boucher		MPI	^
PD		MPI-Sample #1	
2017 Volkswagen Jetta S		MPI-Sample #2	
Odometer		MPI-Sample #3	
🚔 Ann Gray		MPI-Sample #4	
ITEMS		MPI-Sample #5	
		Canned Jobs	$\sim$

5. Add mileage and select technician.

	MPI-Sample #5	
	15000 late 1	
	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:



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** (5) to open the WIP.
- 2. Use the search bar at the top to search the WIP by **Customer Name**, **Company Name**, or **Estimate Number**.

1:28 PM Mon Nov	5 W/ID	<b>, 11 🗢 100% </b>
Search Co	ustomer Name, EST #, Company	Q
5	Est #080212 Pierce Boucher 858-391-5000 2017 Volkswagen Jetta S	>
5.	Est #080211 Pierce Boucher 858-391-5000 2017 Volkswagen Jetta S	>
الح]	Est #080209 CVG 858-391-5000 2012 Kenworth T700	>
5.	<b>RO #032172</b> Cole Paddock 555-769-1331 2002 Ford Windstar LX	>
5.	Est #080207 CVG 858-391-5000 2002 Chevrolet C Series - C5	>

#### From the Customer Detail Screen

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

1:18 PM	1 Mon Nov 5	<b>!! 🗢 100% </b>
<	Customer Detail	
	Pierce Boucher 858-391-5000	
ſ	Select WIP	
ST,	<b>CA BOOSHAY</b> 2017 Volkswagen Jetta S	
	Est #080212	
+	Est #080211	
		<b>~</b> 2
Ľ		
		<b>~•</b>
1		
	Cancel 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.

▼         Multi-Point Inspection Template Manager		
Home		
General	Multi-Point Inspection Template Setup	_
Templates	New Edit Delete Duplicate	
	Stock Multi-Point Inspection Templates	•
	MPI-Sample #1	
	MPI-sample #2	
	MPI-Sample #3	
	MPI-Sample #5	
	Training template 1	

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**.

		Multi-Point Inspection Template Manager	
Home			
Setup Help Save	ABC Check Print Spelling Preview	Add Group Delete Group Delete Trem	
Actions	4	Groups 🖌 Items 🖌	$\diamond$
MPI-Sample #4 - Copy	x		х
MPI Group Name			
State Inspection		MPI Template Name: MPI-Sample #4 - Copy	
		Include Tire Inspection Group	
Item Name	Туре		
Inspection Date	Date		
State Emissions	Red/Yellow/Green	Group Name: State Inspection	
State Safety	Red/Yellow/Green		
Interior / Exterior			
Item Name	Туре		
🗉 Dash Warning Li	Red/Yellow/Green		
TPMS Light	Red/Yellow/Green		
🗄 Horn	Red/Yellow/Green		
TT Afference	Red/Yellow/Green		
1 Mirrors			
Wiper Blades-W	Red/Yellow/Green		
<ul> <li>Wiper Blades-W</li> <li>Parking Brake</li> </ul>	Red/Yellow/Green Red/Yellow/Green		
Mirrors     Wiper Blades-W     Parking Brake     Headlight-Parkin	Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Mirrors     Wiper Blades-W     Parking Brake     Headlight-Parkin     Turn Signals-Haz	Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Mirrors  Wiper Blades-W  Parking Brake Headlight-Parkin Turn Signals-Haz Reverse Lights	Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Wirrors     Wiper Blades-W     Parking Brake     Headlight-Parkin     Turn Signals-Haz     Reverse Lights     Cabin Air Filter	Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
<ul> <li>mirrors</li> <li>Wiper Blades-W</li> <li>Parking Brake</li> <li>Headlight-Parkin</li> <li>Turn Signals-Haz</li> <li>Reverse Lights</li> <li>Cabin Air Filter</li> <li>Fluids</li> </ul>	Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		

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.

Lister Linese		Multi-Point Inspection Template Manager	
Home			
🎭 📭 💾	ABC		
Setup Help Save	Check Print Spelling Preview	Add Group Delete Add tem Delete Group Item	
Actions	4	Groups 4 ems 4	4
MPI-Sample #4 - Copy	x		3
4PI Group Name			_
State Inspection		PIPI remplate Name: MPI-Sample #4 - Copy	
	-	Include Tire Inspection Group	
Pitem Name	Туре		
Inspection Date	Date		
Interior / Exterior	Туре		
Interior / Exterior Item Name Dash Warning Li	Type Red/Yellow/Green		
Interior / Exterior Item Name	<b>Type</b> Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior Item Name Dash Warning Li TPMS Light Horn	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior Item Name Dash Warning Li TPMS Light Horn Mirrors	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior Item Name Dash Warning Li TPMS Light Horn Mirrors Wiper Blades-W	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior Item Name Dash Warning Li TPMS Light Horn Mirrors Wiper Blades-W Parking Brake	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior Item Name Dash Warning Li TPMS Light Horn Mirrors Wiper Blades-W Parking Brake Headlight-Parkin	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
I Interior / Exterior <b>Item Name</b> Dash Warning Li TPMS Light Horn Mirrors Wiper Blades-W Parking Brake Headlight-Parkin Turn Signals-Haz	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior           Interior / Exterior           Image:	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior       Item Name       Dash Warning Li       Dash Warning Li       TPMS Light       Horn       Mirrors       Wipper Blades-W       Parking Brake       Headlight-Parkin       Thr Signals-Haz       Reverse Lights.       Cabin Air Filter	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		
Interior / Exterior       Item Name       Dash Warning Li       TPMS Light       Horn       Mirrors       Wiper Blades-W       Parking Brake       Headlight-Parkin       Try Signals-Haz       Reverse Lights       Cabin Air Filter	Type Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green Red/Yellow/Green		

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.

<b>₹</b>	Multi-Point Inspection Template Manager	
Home       Image: Setup       Help       Setup       Help       Save       Check       Spelling       Preview	Add Group Delete Group Group Items	~
Training template 1 ×		х
MPI Group Name Training group 1 Them Name	MPI Template Name: Training template 1 Include Tire Inspection Group	
	Group Name: Training group 1	
	Inspection Item: Inspection Item 1 Description: Description goes here Type: Red/Yelow/Green Checkbox Date Edit Box Numeric	

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

Image: Setup Help Save Check Print Spelling Preview       Add Group Delete Group       Add Item Delete Item         Add Item Spelling Preview       Add Group Delete Group       Items         MP1-Sample #4 - Copy ×       MP1 Template Name:       MP1-Sample #4 - Copy         MP1-Sample #4 - Copy ×       MP1 Template Name:       MP1-Sample #4 - Copy         Impection Date       Items       MP1-Sample #4 - Copy         State Inspecton       Impection Date       Impection Coup         Impection Date       Impection Red/relow/Green       MP1 Template Name:         Interior / Exterior       Impection Red/relow/Green       Impection Red/relow/Green         Minor Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Pashu Saming Brabe Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Pashu Saming Brabe Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Pashu Saming Brabe Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Praving Brabe Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Proving Brabe Red/relow/Green       Filter Red/relow/Green       Impection Red/relow/Green         Proving Red Herein       Red/relow/Green       Impection Red/relow/Green         Minor Same Addi	▼         Multi-Point Inspection Template Manager			
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MPI-Sample #4-Copy       ×         MPI Group Name       MPI Template Name:         State Inspection       MPI Template Name:         Impection Date       Date         State Ensistons       Red/Velow/Green         Interior / Exterior       Type         Dash Warning L Red/Velow/Green       State Ensistons         There Name       Type         Dash Warning L Red/Velow/Green       State Ensistons         TMPY Light       Red/Velow/Green         Mirrors       Red/Velow/Green         Wiper Blades-W       Red/Velow/Green         Parking Brake       Red/Velow/Green         Parking Brake       Red/Velow/Green         Two Signis-Haz Red/Velow/Green       Reverse Lights         Reverse Lights       Red/Velow/Green         Fluids       Lights	Actions	4	Groups 4 Items 4	6
PHY Group Name       MPI Group Name         PHY Group Name       MPI State Inspection         Inspection Date       Date         Inspection Date       Date         State Inspection Date       Date         Inspection Date       Date         Inspection Date       Date         Interior / Exterior       Group Name:         Interior / Exterior       The Red/Yellow/Green         Pash Warning LL       Red/Yellow/Green         Mirrors       Red/Yellow/Green         Parking Pake Red/Yellow/Green       Parking Pake Red/Yellow/Green         Parking Pake Red/Yellow/Green       Parking Pake Red/Yellow/Green         Parking Pake Red/Yellow/Green       Reverse Lights Red/Yellow/Green         Parking Pake Red/Yellow/Green       Fluids         Parking Pake Red/Yellow/Green       Fluids	MPI-Sample #4 - Conv	×		×
State Inspection         Item Name       Type         Inspection Date       Date         Inspection Date       Date         State Emissions       Red/Yellow/Green         Interior / Exterior       Item Name         There Name       Type         Dath Warning Li       Red/Yellow/Green         There Name       Type         Dath Warning Li       Red/Yellow/Green         There Name       Type         Dath Warning Li       Red/Yellow/Green         There Name       Type         Bath Warning Li       Red/Yellow/Green         Horn       Red/Yellow/Green         Wiper Blades-Wu       Red/Yellow/Green         Parking Prake Red/Yellow/Green       The Red/Yellow/Green         Parking Prake Red/Yellow/Green       Red/Yellow/Green         Reverse Lights       Red/Yellow/Green         Cabin Ar Filter       Red/Yellow/Green         E Huids       There Red/Yellow/Green	MPI Group Name			
Item Name       Type         Inspection       Date         State Emissions       Red/Yellow/Green         State Safety       Red/Yellow/Green         Interior / Exterior       Fore Name         Dash Warning Li       Red/Yellow/Green         Dash Warning Li       Red/Yellow/Green         Horn       Red/Yellow/Green         Wiper Blades-W       Red/Yellow/Green         Parking Brake       Red/Yellow/Green         Tur Signals-Hat Red/Yellow/Green       Tur Signals-Hat Red/Yellow/Green         Reverse Lights Red/Yellow/Green       Edited Now Green         Fluids       Edited Now Green         Fluids       Fluids	State Inspection		MPI Template Name: MPI-Sample #4 - Copy	
Item Name     Type       Impection Date     Date       State Emissions Red/Vellow/Green     Group Name:       Interior / Exterior     Interior / Exterior       Interior / Exterior     Type       Dash Warning L     Red/Vellow/Green       TPMS Light     Red/Vellow/Green       Mirrors     Red/Vellow/Green       Wiper Blades-W     Red/Vellow/Green       Parking Brake     Red/Vellow/Green       Tum Signals-Hac     Red/Vellow/Green       Tum Signals-Hac     Red/Vellow/Green       Reverse Lights     Red/Vellow/Green       Externet     Red/Vellow/Green       Headlight-Parkin     Red/Vellow/Green       Externet     Reverse Lights       Reverse Lights     Red/Vellow/Green       Externet     Red/Vellow/Green	a state inspection		Include Tire Inspection Group	
Image: Comparison Date     Date       State Emissions     Red/Yellow/Green       State Safety     Red/Yellow/Green       Interior / Exterior     Interior / Exterior       Interior / Exterior     Red/Yellow/Green       Interior / Exterior     Red/Yellow/Green       Interior / Exterior     Red/Yellow/Green       Interior / Exterior     Red/Yellow/Green       Interior Red/Yellow/Green     Mirrors       Red/rellow/Green     Migner Blades-W       Parking Rake     Red/Yellow/Green       Interior Sake     Red/Yellow/Green       Interior / Exterior     Red/Yellow/Green	Item Name	Туре		
B State Emissions       Red/Yellow/Green         B State Safety       Red/Yellow/Green         Interior / Exterior       State Inspection         Interior / Exterior       State Safety         Dash Warning LL       Red/Yellow/Green         D Horn       Red/Yellow/Green         Horn       Red/Yellow/Green         Wiper Blades-W       Red/Yellow/Green         Parking Brake       Red/Yellow/Green         Headight-Parkin       Red/Yellow/Green         E Headight-Parkin       Red/Yellow/Green         B Textures Lights       Red/Yellow/Green         B Lobin Air Filter       Red/Yellow/Green         B Fluids       State Safety	Inspection Date	Date		
Interior / Exterior         Interior / Exterior         Dash Warning L         Red/Yellow/Green         Horn       Red/Yellow/Green         Horn       Red/Yellow/Green         Wiper Blades-W       Red/Yellow/Green         Parking Brake       Red/Yellow/Green         Headlight-Parkin       Red/Yellow/Green         Inv Signals-Hac       Red/Yellow/Green         Exercise Lights       Red/Yellow/Green         Brevirse Lights       Red/Yellow/Green	State Emissions	Red/Yellow/Green	Group Name: State Inspection	
Interior / Exterior       Item Name     Type       Dash Warning LL     Red/Yellow/Green       TPMS Light     Red/Yellow/Green       Horn     Red/Yellow/Green       Mirrors     Red/Yellow/Green       Parking Pake     Red/Yellow/Green       Parking Pake     Red/Yellow/Green       Headlight-Parkin     Red/Yellow/Green       Reverse Lights     Red/Yellow/Green       Cabin Air Filter     Red/Yellow/Green       Hulds     Kel/Yellow/Green	State Safety	Red/Yellow/Green		
Item Name     Type       Dash Warning LL     Red/Yellow/Green       TPMS Light     Red/Yellow/Green       Horn     Red/Yellow/Green       Mirrors     Red/Yellow/Green       Parking Pake     Red/Yellow/Green       Parking Pake     Red/Yellow/Green       Turn Signals-Haz     Red/Yellow/Green       Reverse Lights     Red/Yellow/Green       Cabin Air Filter     Red/Yellow/Green       Ekuds     Red/Yellow/Green	Interior / Exterior			
Badh Warning L Red/Yellow/Green     TMMS Light Red/Yellow/Green     Horn Red/Yellow/Green     Mirrors Red/Yellow/Green     Wiper Blades-W Red/Yellow/Green     Parking Pravk Red/Yellow/Green     Headlight-Parkin Red/Yellow/Green     Reverse Lights Red/Yellow/Green     Reverse Lights Red/Yellow/Green     Reverse Lights Red/Yellow/Green     Reverse Lights Red/Yellow/Green	Item Name	Туре		
IPMS Light     Red/Yellow/Green       Horn     Red/Yellow/Green       Mirrors     Red/Yellow/Green       Wiper Blades-W     Red/Yellow/Green       Parking Brake     Red/Yellow/Green       Itadight-Parkin     Red/Yellow/Green       Turn Signals-Haz     Red/Yellow/Green       Cabin Air Filter     Red/Yellow/Green       Edabin Air Filter     Red/Yellow/Green	🗉 Dash Warning Li	Red/Yellow/Green		
Horn     Red/Yellow/Green       Mirrors     Red/Yellow/Green       Wiper Blades-W     Red/Yellow/Green       Parking Brake     Red/Yellow/Green       Headight-Parkin     Red/Yellow/Green       Turn Signals-Haz     Red/Yellow/Green       Cabin Air Filter     Red/Yellow/Green       Fluids     Headight-Parkin	TPMS Light	Red/Yellow/Green		
Immors     Red/Yellow/Green       Wiper Blades-W     Red/Yellow/Green       IP Parking Rake     Red/Yellow/Green       IP Headight-Parkin     Red/Yellow/Green       IT rum Signals-Haz     Red/Yellow/Green       IR Reverse Lights     Red/Yellow/Green       ID Cabin Air Filter     Red/Yellow/Green	Horn	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         Huds       Headly State	Mirrors	Red/Yellow/Green		
Parking Brake Red/Yrellow/Green Headlight-Parkin Red/Yellow/Green Turn Signals-Haz Red/Yellow/Green Reverse Lights Red/Yellow/Green Cabin Air Filter Red/Yellow/Green Huids	🗄 Wiper Blades-W	Red/Yellow/Green		
III Headight-Parkin       Red/Yellow/Green         III Turn Signals-Hat       Red/Yellow/Green         III Cabin Air Filter       Red/Yellow/Green         III Cabin Air Filter       Red/Yellow/Green	🗄 Parking Brake	Red/Yellow/Green		
Image: Turn Signals-Haz       Red/Yellow/Green         Reverse Lights       Red/Yellow/Green         Cabin Air Filter       Red/Yellow/Green         Fluids       Red/Yellow/Green	Headlight-Parkin	Red/Yellow/Green		
Reverse Lights Red/Yellow/Green     Cabin Air Filter Red/Yellow/Green     Huids	🗄 Turn Signals-Haz	Red/Yellow/Green		
Cabin Air Filter Red/Yellow/Green Huids	🗄 Reverse Lights	Red/Yellow/Green		
I Fluids	🗄 Cabin Air Filter	Red/Yellow/Green		
	I Fluids			
Itam Name Type Y	Ttem Name	Тире	T	

# Adding an Inspection to an Order

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

3:27 PM Mon Nov 5 🗢 100				
<	New Estim	ate		
PB	Pierce Boucher 858-391-5000	>		
2017 Vo Jetta S	olkswagen	$_{\sf ca\ booshay}$ >		
Odometer				
Same 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 E	Cancel
סח	Pierce Boucher 858-391-5000	МРІ
PD		MPI-Sample #1
2017 V Tetta S	olkswagen	MPI-Sample #2
Oderseter		MPI-Sample #3
Odometer		
🐊 Irving Ibanez		MPI-Sample #4
ITEMS		MPI-Sample #5
		Training template 1
		Canned Jobs 🗸 🗸

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.

3:30 PM Mon Nov 5		হু 100% 🔲
<	Training template 1	Save
Scheduled Maintenance Items		Ţ
Interior / Exterior		>
Underhood		>

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

2:51 PM Tue Nov	6		후 100% 🔲
<		Edit Order	Done
РВ	Pierce Boucher 858-391-5000		
2017 V Jetta S	/olkswagen		CA BOOSHAY
Odometer 150	000 /		
💄 Irving Iba	nez		Est #080213
ITEMS			+ ADD ITEM
Training temp # Irving Iban	olate 1 ez		<b></b>

# Printing Inspections from SE

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

28 Mitchell 1 TeamWorks SE							
<u>File Edit View</u> Configurations <u>Utilities</u> Inventory History	r Training Videos CRM	<u>H</u> elp					
WLP. Quote New Counter P.O.s Inventory Schedule	Users Reports Owner	Forum Setup	? How to	Benair Info	SocialCRM		
Boucher, Pierce 2017 Volkswagen Jetta S 1.4L,In-Line4 (85Cl) VIN(6) L	ic: CA BOOSHAY Color: Gray	Home: 858-391-50	00	, ricpuir into	Socialement		
<u>C</u> ustomer <u>V</u> ehicle <u>O</u> rder	<u>R</u> evision	His <u>t</u> ory			Estimate #	¥	080213
Parts Labor Motes Sublet Symptom Jobs Part	<u>K</u> it Promos <u>Es</u> timato	r <u>M</u> aint. Fluid	ts TS <u>B</u> s	MPIs 1	Open Recall	s 🛛	Print LOF
Written By <pre><mail +="" anote="" anote<="" td=""><td>Ref#</td><td>Odometer -</td><td>Prev.</td><td>79</td><td>In 15000</td><td>Out</td><td>0</td></mail></pre>	Ref#	Odometer -	Prev.	79	In 15000	Out	0
Promised 1/ 1/1970 . 12:00 AM - Source <none></none>	<b>.</b>	. Engine Hours	- Prev.	0.0	In 0.0	Out	0.0
Order Hrs: 0.00 Driver. <none> Row Color Definitions</none>							
Time Rate Description	n	Qty E	xtended	Sale	Price L	ist	Part No.
0.00		0.00	\$0.00	\$0.00	\$0.00	\$0.00	

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.

Order Inspections					
	Inspections for Order #080213				
	Inspection	Technician	Date	Status	
	Training template 1	Ibanez, Irving	11/6/2018 2:50 PM	Complete	
	Add New: Choose Template	to Add 🔹	<u>P</u> rint <u>D</u> e	elete <u>O</u> K	

## 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.

2:42 PM Fri Nov 2							
<			Schedules			÷	
ER 2018		OCTOBER 2018			NOVEN		
SUN	MON	TUE	WED	THU	FRI	SAT	
28	29	30	31	1	2	3	
Friday, 02 No	ov 2018						
08:00 AM TO 08:30 AM	Pierce Boucher 2017 Volkswagen Jetta S						
10:00 АМ то 10:30 АМ	Darrick Abdallah						
12:00 PM TO 12:30 PM	Lynne Fallon 1995 Honda Civic LX						
02:00 PM TO 02:30 PM	<mark>Sharolyn Lacour</mark> 1999 Mercury Cougar						
04:00 PM TO 04:30 PM	Jaunita Abler						