

Mitchell 1 / ShopKey Shop Management Installation

Your guide to install the latest version of the Mitchell 1 or ShopKey Shop Management Software

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<https://mitchell1.com>

Your Guide to Install Version 8.x.x of Mitchell 1 or ShopKey Shop Management Software.

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Chapter 1: Setup/Configuration

System Requirements:

Before you begin installation, please make sure that the computer(s) you will be installing your Shop Management system software on meet(s) the minimum requirements below. The minimum requirements listed apply to the current set of applications; they may not be compatible with future software releases. Please note the majority of Mitchell1 applications require administrator-level privileges. Attempts to limit user permissions may result in incorrect program function.

If you have any questions, or for the most current information, please contact Technical Support at 888-724-6742.

Minimum System Requirements

- Windows® 10 version 21H2, 64-bit for Host; 32-bit for Workstation. *
- Intel Core i3 6100 or AMD Ryzen 3 1200.
- 8 (GB) Random Access Memory (RAM) is required for the computer running the Host/Server software. 4 Gigabyte RAM is required for any computer running only the Workstation software.
- 40 GB of free disk space.
- Keyboard & Mouse.
- Inkjet printer or Laser Printer (Due to the large variety of printers available we cannot guarantee that every printer will be compatible with our software).
- Broadband Internet Connection. **
- Backup media (Flash drive, external HDD, etc.).

Recommended System Requirements

- Windows® 10 version 21 H2 or Windows 11, 64-bit version. *
- Intel Core i5 8400 or AMD Ryzen 5 3000 Series.
- 16 GB Random Access Memory (RAM).
- 80 GB available free disk space on Solid State Drive.
- Keyboard & Mouse.
- Sound Card and speakers (For training videos).
- Inkjet or Laser printer (Due to the large variety of printers available we cannot guarantee that every printer will be compatible with our software).
- A UPS (Uninterruptible Power Supply) is highly recommended.
- Broadband Internet Connection. **
- Backup media (Flash drive, external HDD, etc.).

* Windows® Server platforms (Server 2016, 2019, 2022) are not supported. Virtual environments or Windows® emulation are also unsupported.

** Broadband connections are defined as Cable Internet, DSL 1.5 Mbps or higher, or T1 and higher connections. Satellite and wireless connections are generally not advisable.

¹Active Directory/Domain environments are not supported; only peer-to-peer workgroups. Windows® Server 2012 Foundation and Essentials are not supported and both versions come with the Domain Controller feature of Windows® Server in a state where you cannot disable it.

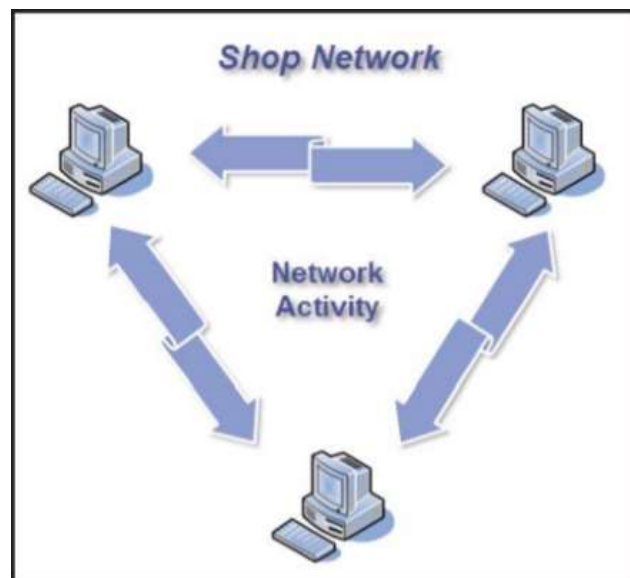
Networking Requirements

Network connectivity is required if you will be using your Shop Management system on multiple computers. For network setups with access to the internet, a commercial firewall and antivirus application is highly recommended. We also recommend the services of a professional network administrator in configuring your network environment.

- Commercial Grade 100 MB/sec or faster network card.
- TCP/IP network protocol.
- Wireless connectivity is supported using 802.11n or faster.
- 5 or more concurrent users should consider a dedicated computer to host the database. Network domains are not supported.

DISCLAIMER:

- The minimum requirements listed above apply to the current set of applications; they may not be compatible with future software releases. Please note the majority of Mitchell1 applications require administrator-level privileges. Attempts to limit user permissions may result in incorrect program function. If you have any questions, or for the most current information, please contact Technical Support at 888-724-6742.

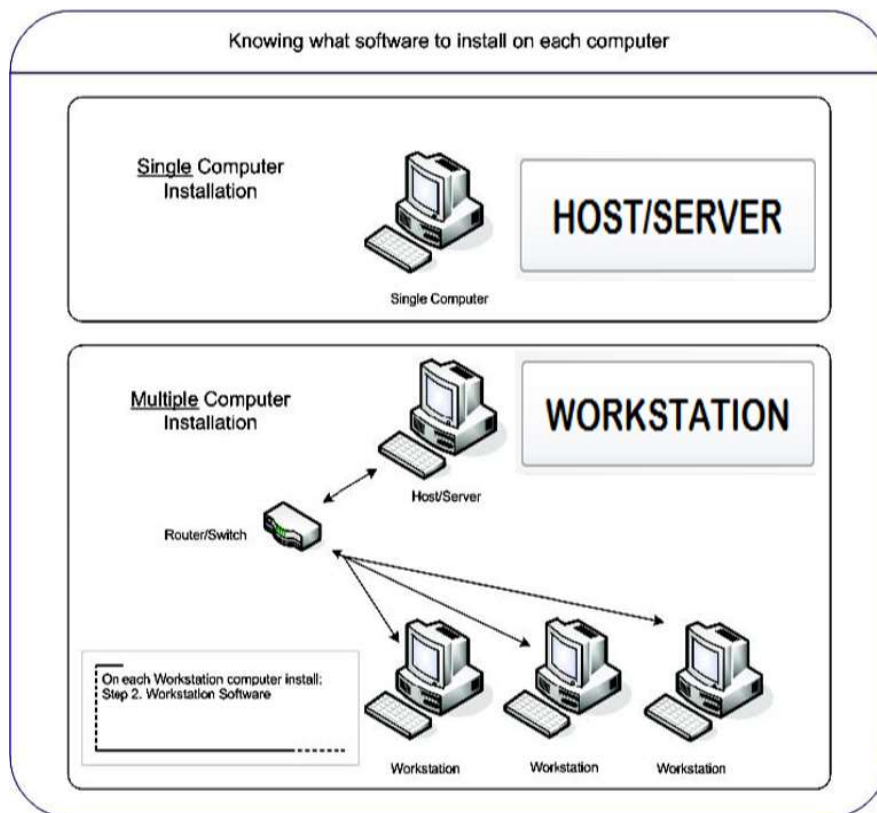


Chapter 2: Installing Your Shop Management System Software

You may follow the detailed instructions below to install your Shop Management system software on a single computer, or multiple computers, depending on your setup.

Host/Server and Workstation Installations

- Host/Server:
 - The HOST/SERVER button installs both database engine and workstation. The database stores Customer Data, Vehicle, Repair Order History, etc. The workstation software allows you to interact with the database.
- Workstation:
 - The WORKSTATION button only installs workstation software for other computers connected to your Server. The workstation software is your window into the database and what you see on your computer monitor.



Host/Server Installation

Single Computer Setup

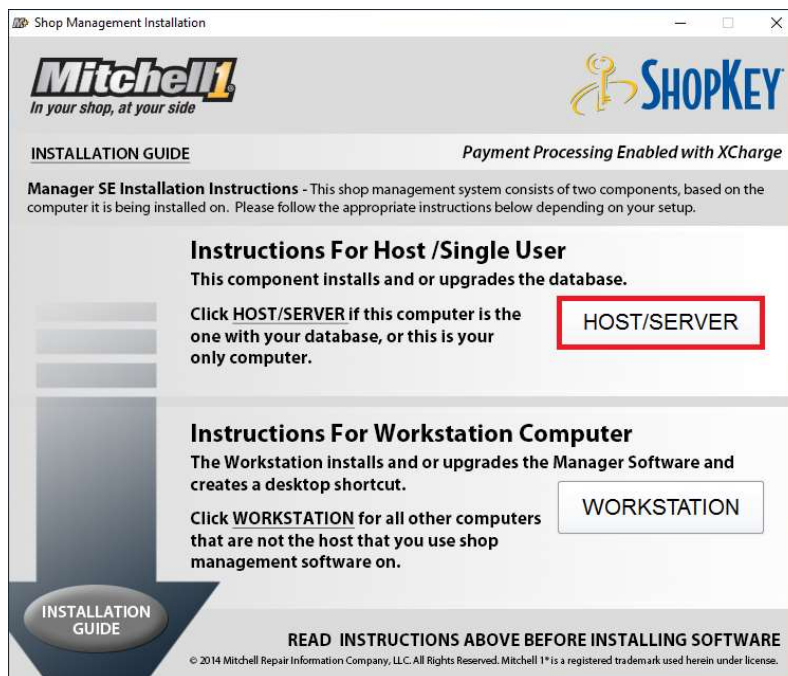
- If you have a single computer you only need to click on the **HOST/SERVER** button, which will install the database engine and workstation components.

Multiple Computer Setup

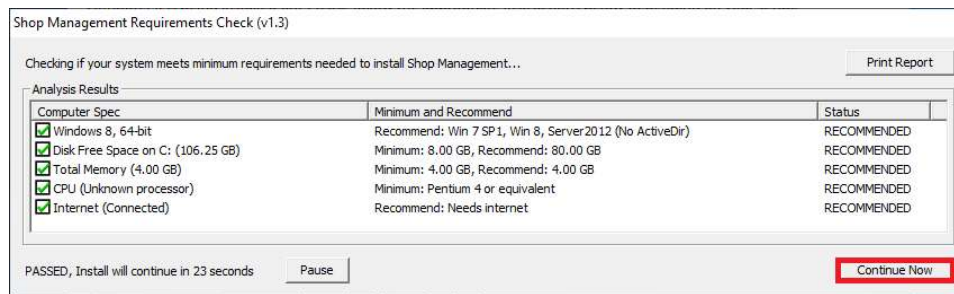
- You will be installing the **Host/Server** (database) software on only one computer as the first step. For best performance, the computer you choose to act as your “Host/Server” should be the highest performing computer in your shop. It is critical that the Host/Server software installation is completed before moving on to the installation of the workstation software on any of your computers.

Install the Host/Server Software

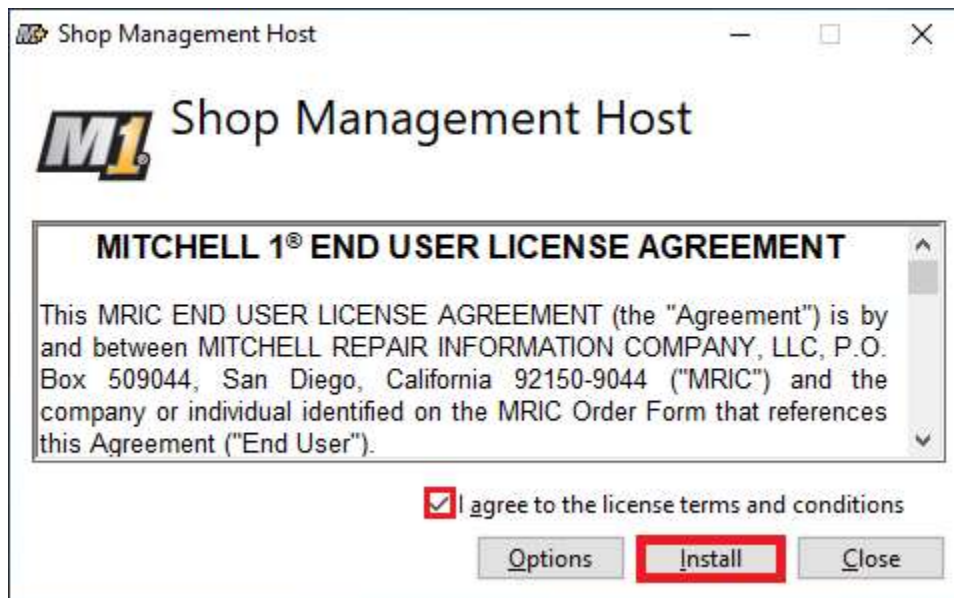
1. Download the installer files from <https://m1files.com> and choose Full Install. Click on the downloaded file to open it. Click on the **HOST/Server** button to start the installation.



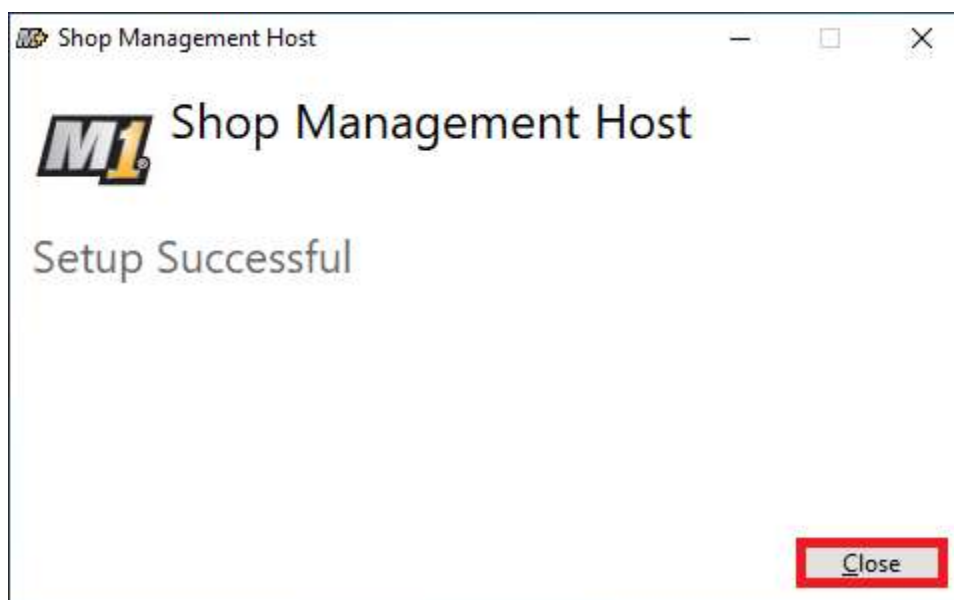
2. The Shop Management Requirements Check will check for minimum requirements. This screen will close in 30 seconds, you may pause it if necessary by clicking on the Pause button. Click "Continue now" to proceed.



3. Check in the box next to "I agree to the license terms and condition", and click "Install".



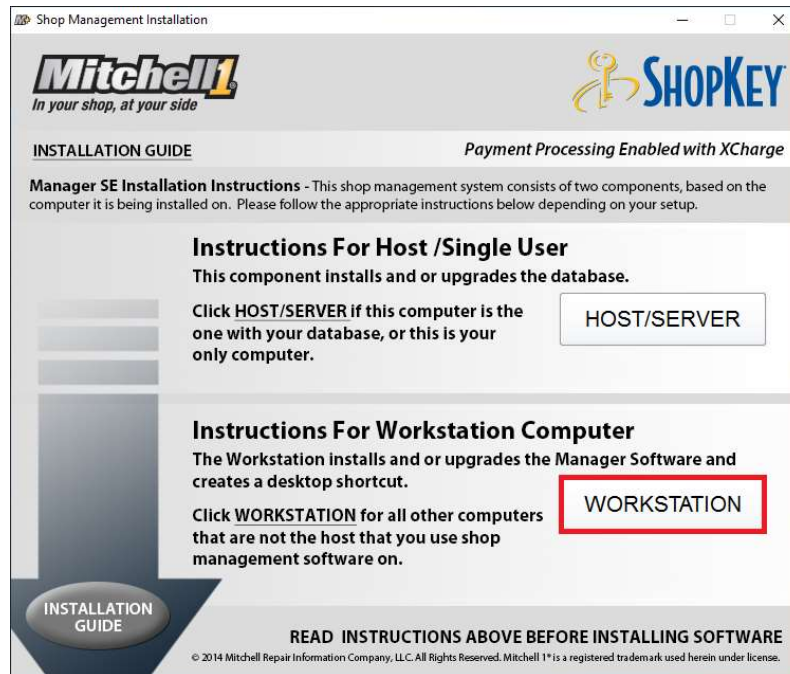
4. When the installation completes you will be prompted to "Close" the setup, this finalizes the installation.



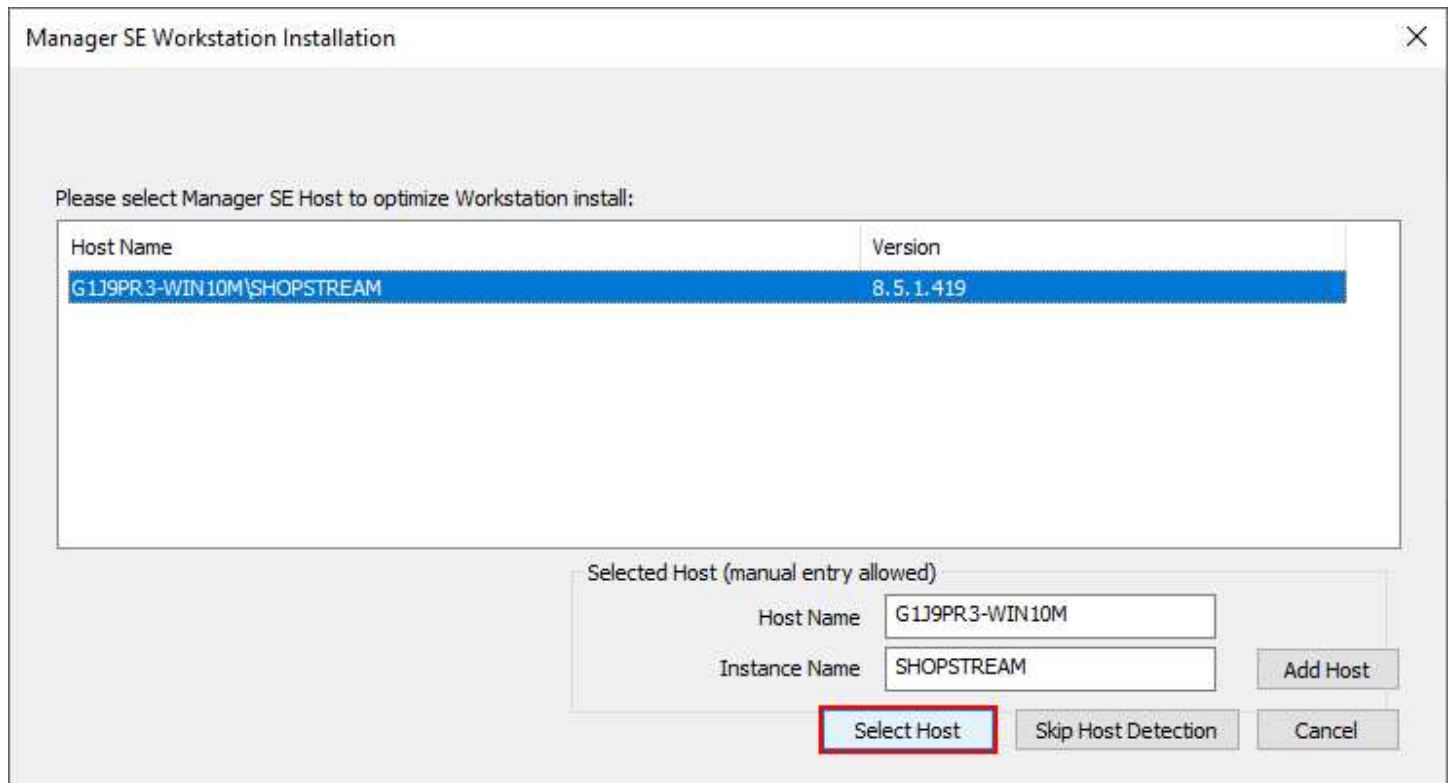
If coming from one of our legacy products, or if re-installing your host software please contact our technical support to migrate/transfer the information to your new install.

Install the Workstation software

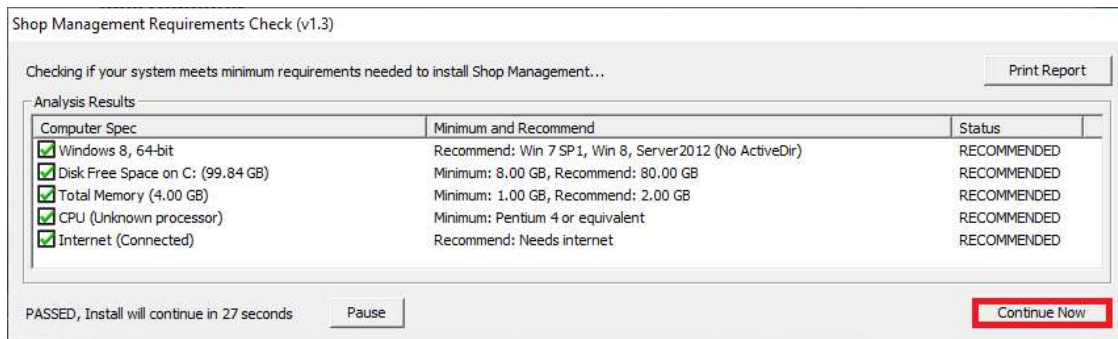
1. Download the installer files from <https://m1files.com> and choose Full Install. Click on the downloaded file to open it. Click on the **Workstation** button to start the installation.



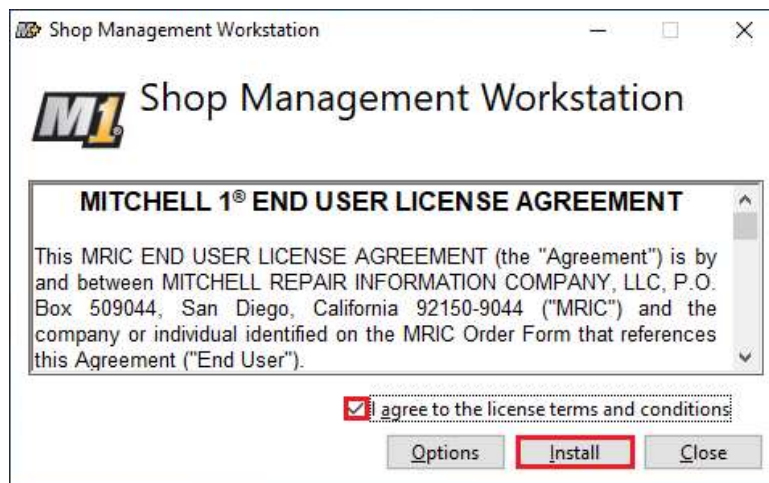
2. Next select the host computer from the list in the Manager SE Workstation Installation box and click "Select Host".



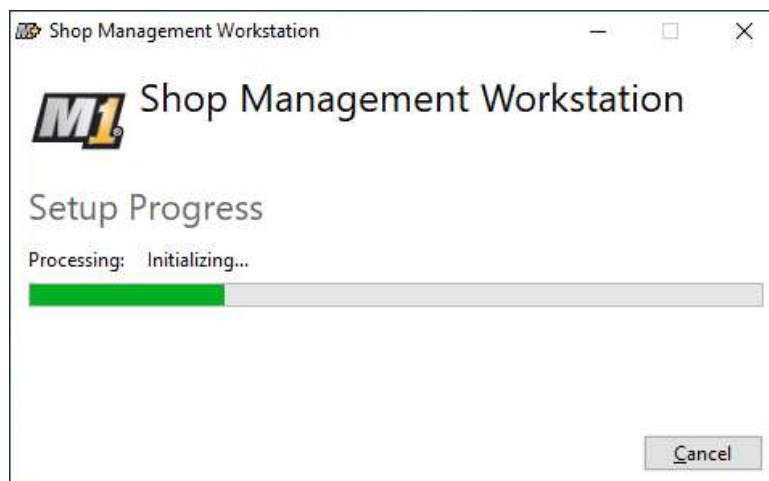
3. The Shop Management Requirements Check will check for minimum requirements. This screen will close in 30 seconds, you may pause it if necessary by clicking on the “Pause” button. Click “Continue Now” to proceed.



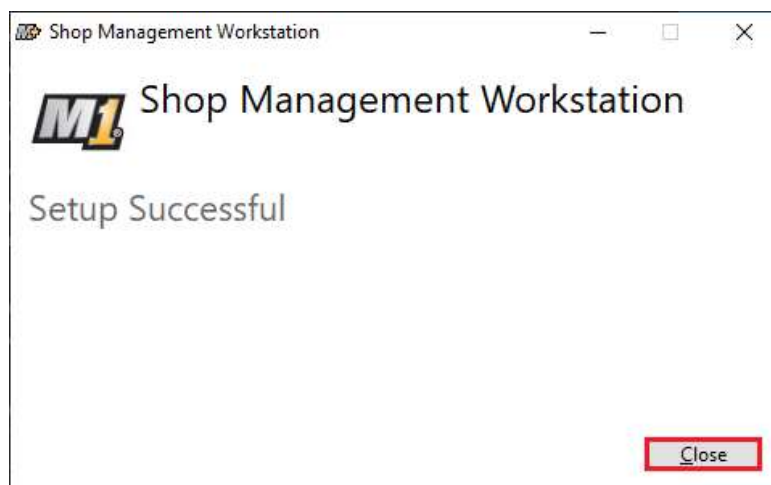
4. Check in the box next to “I agree to the license terms and condition”, and click “Install”.



Your Workstation will now start to install.



5. When the installation completes you will be prompted to click “Close”, this finalizes the installation.



Chapter 3: Getting Started

Overview

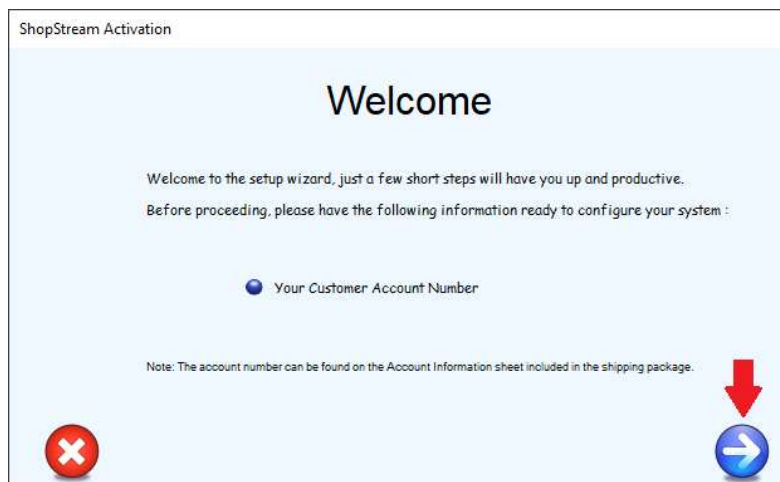
Your software is a set of integrated programs, or components, which provide a comprehensive solution for automotive service shop management, estimating, and parts ordering. This chapter describes how to activate your Shop Management system and provides a brief introduction to each of the components. For more detailed information on a particular component, refer to the Help section for that component.

Starting your Shop Management System

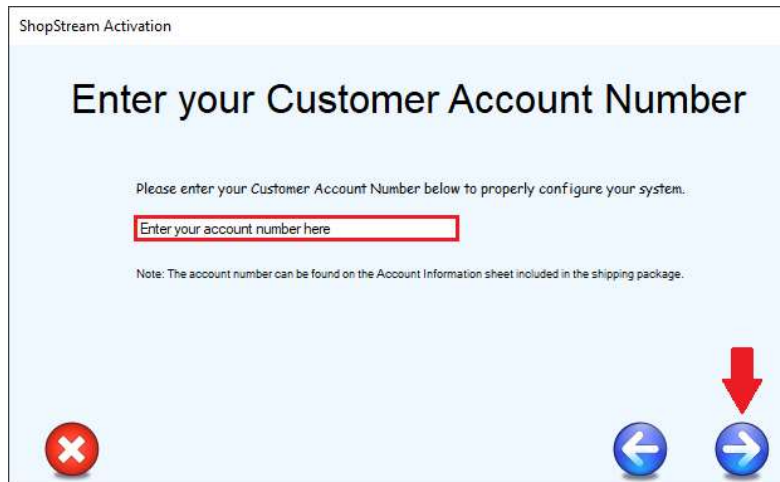
1. Your Shop Management system software is started by double clicking the program icon on your desktop. This will depend on which branding you subscribed to, The silver and gold “M+” Icon for Mitchell1 and the red “S” for ShopKey



2. Once opened for the first time, you will be prompted to enter your customer account number, first click on the arrow icon pointing right:



3. And then enter your account number. This number is included either in your software package, or given to you by your Sales Representative or a Sales Agent, as a 6 or 7 digit number. After you have entered your account number, click on the arrow icon pointing right.



ShopStream Activation

Enter your Customer Account Number

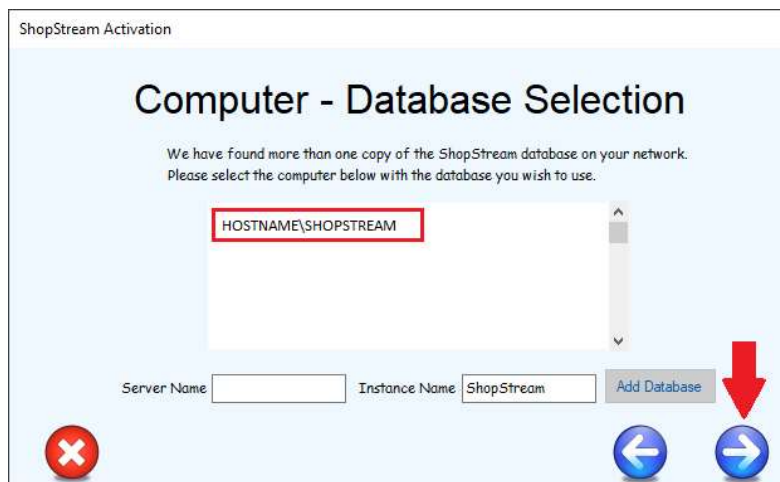
Please enter your Customer Account Number below to properly configure your system.

Enter your account number here

Note: The account number can be found on the Account Information sheet included in the shipping package.

Navigation buttons: Back (left arrow), Forward (right arrow), Cancel (X), and a red arrow pointing down to the Forward button.

Note: If you are installing workstations, it will have you select the name of the host and will not need you to add your account number.



ShopStream Activation

Computer - Database Selection

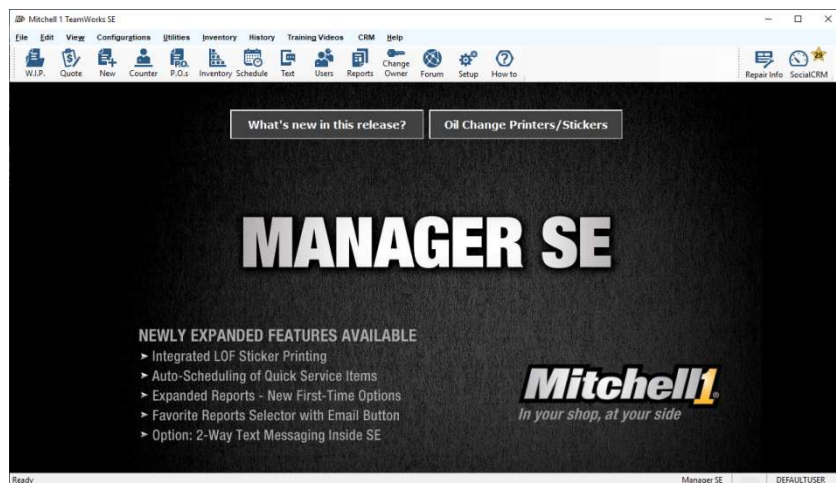
We have found more than one copy of the ShopStream database on your network. Please select the computer below with the database you wish to use.

HOSTNAME\SHOPSTREAM

Server Name: Instance Name: ShopStream Add Database

Navigation buttons: Back (left arrow), Forward (right arrow), Cancel (X), and a red arrow pointing down to the Forward button.

4. When you arrive at the splash screen, your product has successfully been activated with your account number.



Note: This screen may be different depending on the branding of your product.

Chapter 4: Component Overview

The Shop Management component provides the organization and structure for the suite of management tools. Additional components are available for accessing repair and estimating information. Depending on your subscription, a combination of some or all of the following components is available.

*NOTE: More complete information for learning and configuring Shop Management is found in the **SETUP** and **LEARN** PDF workbooks available under the **Help, Documentation** menu.*

Shop Management

These icons are used in Shop Management, where you create orders, store your customer information, view your work in progress, and manage your business. Choose the **W.I.P.** icon to open the Work In Progress screen and view your active work orders. Choose the **New** icon to start a new work order and enter customer information. Choose the **Quote** icon to do a quick quote for a work order that you can turn into an estimate when agreed to. Choose the **Counter** icon to create a counter sale for a quick transaction.



Repair Information

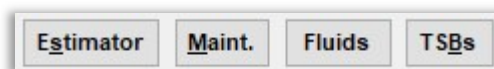
Clicking this icon opens ProDemand.com/ShopKeyPro.com Repair and Estimating information, just as if you had entered into ProDemand.com or ShopKeyPro.com through a separate Internet window. Clicking this icon with a vehicle selected on screen will also transfer the vehicle into ProDemand.com/ShopKeyPro.com and preselect it to provide you with information about that vehicle immediately.



NOTE: You may still login to ProDemand.com/ShopKeyPro.com on your favorite internet browser.

Estimating

“Estimator”, “Maint.”, “Fluids”, and “TSBs” buttons on the order screens are direct links to the corresponding data from ProDemand.com or ShopKeyPro.com. That data may be transferred into any work order.



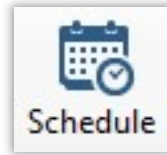
Text Messaging

Clicking this icon opens the Text Message Center. This component allows you to send SMS messages to your customer’s cellular device directly, with the ability to send templates with pre-filled information such as order totals and repair status, as well as links to PDFs of estimates and invoices. (NOTE: Requires a MessageCenter subscription)



Scheduler

Clicking the **Schedule** icon opens the Scheduler, allowing you to create appointments for your customers and visualize them in an easy drag-and-drop view. You can assign your technicians and service writers when creating an appointment, place them in different states and resources, and even create a work order directly from the appointment itself.



Inventory Management

The Shop Management system has the ability to track your inventory and parts ordered for stocking. Click on the **Inventory** icon to open up the Inventory List and Search to manage your items.

Click on the **P.O.s** icon to open the Purchase Orders window to review or create purchase orders. These would include manual purchase orders for vendors not electronically connected or the Re-Stock from Inventory function.

(NOTE: Electronic ordering from parts catalogs generate P.O.s automatically; accessed most easily at Repair Order level)



SocialCRM

Social CRM is a Customer Retention and Marketing solution that allows you the use of tools to develop and enhance your market outreach to potential and existing customers. Features include mailers, text message marketing, online advertising, LocalSearch websites and online review alerts.

(NOTE: Requires a SocialCRM subscription)



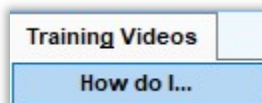
Chapter 5: Getting Help

Shop Management Detailed Help

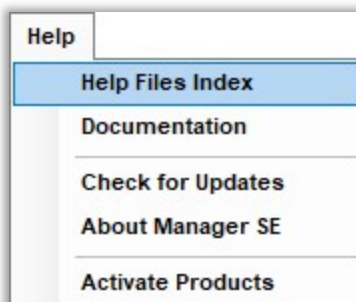
Clicking on the **How to** icon opens Shop Management Online Help within your internet browser, providing you with instructions and information on the screen you have currently open in Shop Management. This button allows you to get quick answers on how to use the software. Pressing the **F1** key on your keyboard also provides the same function. In addition to text & graphics explaining that screen or function, there is usually a direct link to a video about that specific area of the program. *(NOTE: These require audio capability to hear the narration or the text may be read on the screen)*



Clicking on **Training Videos – How Do I** opens an alphabetical list of all 100+ video clips so users can find a specific topic.



For a more comprehensive list of topics, clicking **Help** at the top and selecting **Help Files Index** opens up Shop Management Online Help main page. Clicking on **Documentation** opens Document Central, providing supplemental materials on how to use Shop Management's advanced features.



Shop Management User Forum

You will find a **Forum** icon in the toolbar at the top of the Shop Management screen. The Forum is provided for the use of Mitchell 1 and ShopKey users. Mitchell 1 works hard to ensure that our ProDemand, ManagerSE, ShopKey Pro, and ShopKey Management Systems are the best available. A big part of this is paying close attention to feedback from users. The forum is provided so users may exchange ideas, help one another, and share feedback with our developers and product managers. The forum can be accessed anywhere with internet connection: <https://managerforum.net/>

For frequently asked questions, we also maintain an online **Knowledge Base** site at <https://kb.mitchell1.com/>

