Mitchell 1 / ShopKey Shop Management Installation

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

Mitchell 1
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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. The minimum requirements listed below 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® 7, Windows® 8, Windows® 10, and Windows® Server 2012¹ (No Active Directory), 32 or 64-bit versions (Latest service packs applies to all).
- Dual core processor 2.2GHz (Gigahertz).
- 4 (GB) Random Access Memory (RAM) is required for the computer running the Host/Server software. Two 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® 7, Windows® 8, Windows® 10, and Windows® Server 2012¹ (No Active Directory), 32 or 64-bit versions (Latest service packs applies to all).
- 2.2 GHz Quad-Core Processor or Higher.
- 8 GB Random Access Memory (RAM) or more is highly recommended on the computer running the Host/Server software in a multi-computer environment. RAM may need to be increased on the Host/Server as the number of connected Workstations increases. Performance may be gained on individual Workstations as the RAM is increased above 2 GB.
- 80 GB available free disk space.
- 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.

* Older Windows Server platforms (Server 2003, 2008) are not supported at this time. 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.

- Windows® 7, Windows® 8, Windows® 10, and Windows® Server 2012¹ (No Active Directory), 32 or 64-bit versions (Latest service packs applies to all).
- Commercial Grade 100 MB/sec or faster network card.
- TCP/IP network protocol.
- Wireless connectivity is supported using 802.11g 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. Insert the disk into the DVDROM drive of your Host computer. Or to download the installer files, Mitchell 1 customers click here, ShopKey customers click here. Click on the HOST/Server button to start the installation.

NOTE: If the installation screen fails to appear when the disc is inserted into your computer, you can open the installation menu by performing the following:
• Windows 7: Click the START menu (Windows Icon) > Click COMPUTER > Click your DVD drive > Click AUTORUN.EXE.
• Windows 8: From the START menu > Click DESKTOP > Click the FOLDER icon on your Taskbar > Click This PC > Click your DVD drive > Click AUTORUN.EXE.
• Windows 10: Click START menu (Windows Icon)> Click Documents> Click This PC> Click your DVD drive> Click AUTORUN.EXE.
2. The Shop Management Requirements Check will perform a quick check of your computer 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.
**Mitchell1 Data Protection Registration**

Enter your Customer Number in the box and click “Register” to enable the Mitchell1 Data Protection. If you receive an error please contact Technical Support at (888) 724-6742.
Install the Workstation software

1. Insert the disk into the DVDROM drive of your Workstation computer. Or to download the installer files, Mitchell 1 customers click here, Shopkey customers click here. 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.
3. The Shop Management Requirements Check will perform a quick check of your computer to 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.

![Shop Management Requirements Check](image)

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

![MITCHELL 1® END USER LICENSE AGREEMENT](image)

Your Workstation will now start to install.

![Setup Progress](image)
5. When the installation completes you will be prompted to close the setup, 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

![TeamWorks SE](image1)
![ShopKey Professional SE](image2)

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:

![ShopStream Activation](image3)
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.

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.

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 complete suite of information tools. Additional software components are available for accessing repair and estimating information. Depending on your subscription, most or all of the following components are included.

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

Shop Management

Choose the W.I.P. icon to open the Work-In-Progress screen for an overview of current shop activity (Estimates thru Invoices). Click on New icon to start a new order then select customer & vehicle or enter them as a new customer. Quote is used to quickly price work that can potentially be turned into an actual estimate later. Counter icon is used to create a Counter Sale for a quick sale of something that’s not part of work performed in the shop.

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 browser window. Clicking this icon with a vehicle selected on screen will also transfer the vehicle (Year-Make-Model and VIN if included) 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 using your favorite internet browser.

Estimating

Estimator, Maint., Fluids, and TSBs buttons on the Order screen are direct links to the corresponding data from ProDemand.com or ShopKeyPro.com. That data may be transferred into any Estimate, Repair Order or Invoice. (NOTE: TSB information is for internal reference for shop only; they do not appear on customer documents)

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. (NOTE: Requires a MessageCenter subscription)
**Scheduler**
Clicking the **Schedule** icon opens the Scheduler, providing an overview of existing shop work and allows creation of future appointments for customers, visualizing them in an easy drag-and-drop view. You can assign your technicians and service writers when creating an appointment, optionally reflecting shop resources and selecting appointment states. Appointments can be converted directly into an Estimate or Repair Order to save time and effort.

*(NOTE: Users must complete Scheduler configuration and Technician setup prior to using the Scheduler)*

![Schedule Icon](image)

**Inventory Management**
The Shop Management system has the ability to track your existing 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 provides access to 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)*

![P.O.s & Inventory Icons](image)

**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)*

![SocialCRM Icon](image)
Chapter 5: Getting Help

Shop Management Context-Specific 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 with best practices, and share feedback with our product managers. The forum can be accessed anywhere with internet connection: [https://managerforum.net/](https://managerforum.net/)

For frequently asked questions, we also maintain an online Knowledgebase site at [http://m1faqs.com](http://m1faqs.com)