

Manager SE Setup and Orientation Checklist

The system requirements are verified before installation is allowed to proceed.

Manager SE Installation	Reference	Done
1. Install SE program (Install Guide)	Install Disc	<input type="checkbox"/>
2. Register DPR (enter customer #)	During Install	<input type="checkbox"/>
3. Register X-Charge (with customer approval)	During Install	<input type="checkbox"/>
4. Verify Repair / Estimator Links	Order screen	<input type="checkbox"/>
5. Enable applicable catalog buttons	Config - Special Maintenance	<input type="checkbox"/>
6. Vendor setup	SE Help / SE Videos	<input type="checkbox"/>
7. Download catalog installs (as needed)	http://m1faqs.com/fix/SE/catalogs/	<input type="checkbox"/>
> LEARN – book 1 (demo program practice)		
8. Toggle to Demo mode (confirm switch back to Live)	Page 2	<input type="checkbox"/>
9. Customer / Vehicle Entry	Pages 3-5	<input type="checkbox"/>
10. EST / RO / INV Workflow (includes WIP)	Pages 6-21	<input type="checkbox"/>
11. Recommendations Entry	Pages 22-24	<input type="checkbox"/>
12. Revisions Entry / Transfer	Pages 25-30	<input type="checkbox"/>
<i>Users are encouraged to complete the Self Instruction portion to learn additional program concepts.</i>		
> SETUP – book 2 (live program)		
13. Create a User (Profile; saves preferences)	Page 1	<input type="checkbox"/>
14. Shop Data Setup / Default Settings	Pages 2-3	<input type="checkbox"/>
15. Shop Supplies / Hazmat / Disclaimers	Pages 4-5	<input type="checkbox"/>
16. Labor Rate(s) / Discount Table (price levels) / Tax Rate	Pages 6-8	<input type="checkbox"/>
17. Income / Payment Types / Standard Accounts Classes	Pages 9-10	<input type="checkbox"/>
18. Markup Concepts / Markup / Matrix	Pages 11-14	<input type="checkbox"/>
19. Technician Setup	Page 15	<input type="checkbox"/>
20. Reports / Printers	Page 16	<input type="checkbox"/>
<i>Users are encouraged to complete the Self Instruction portion to learn additional program concepts.</i>		
<i>We strongly suggest that users review the suggestions on the live checklist prior to starting live invoice writing operations. Completing these items will serve to enhance the new software startup experience.</i>		

A **MITCHELL 1** REPRESENTATIVE HAS SUCCESSFULLY SETUP SOFTWARE AND COMPLETED BASIC ORIENTATION CHECKLIST FOR:

NAME OF BUSINESS _____

ACCOUNT # _____

PRINT END USER/ OWNER NAME _____

DATE _____

SIGNATURE END USER/OWNER _____

MITCHELL 1 REP _____

SPECIAL NOTES:

MGRSESOC0915