

Manager SE Setup and Orientation Checklist

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

▶ SE video clip is available – Press F1 key  or use [Training Videos](#) [How do I...](#) for alphabetized list.

Manager SE Installation	Reference	Done
1. With SE installed, register DPR (enter customer account #)	Prompted during install	
2. Integrated Credit Card Processing	1 st Mile, XCharge [1,X or n/a]	
3. O'Reilly's First Call catalog - Vendor Setup 	Credentials - Vendor Setup	
4. Enable additional catalog buttons [as needed] 	Config: Toggle Catalog Availability	
5. Confirm Local Backup [USB thumb drive on host PC] 	MU: Install Workstation on Host	
> LEARN – (demo program practice)		
6. Toggle Demo Mode (confirm user can switch back to live) 	Page 2	
7. Customer / Vehicle Entry    	Pages 3-5	
8. EST / RO / INV Workflow (includes WIP)     	Pages 6-21	
9. Recommendations Entry 	Pages 22-24	
10. Revisions Entry / Transfer to Order  	Pages 25-30	
<i>Users are encouraged to continue with the Self Instruction section to learn additional program concepts</i>		
> SETUP – (live program)		
11. Create a User (Profile stores preferences) 	Page 1	
12. Shop Data Setup / Default Settings  	Pages 2-3	
13. Shop Supplies / Hazmat / Disclaimers   	Pages 4-5	
14. Labor Rate(s) / Discounts (price levels) / Tax Rates   	Pages 7-8	
15. Income / Payment Types / Standard Acct. Classes   	Pages 9-10	
16. Markup / Price Markup Matrix / Markup Concepts  	Pages 10-13	
17. Scheduler Setup   	Pages 14-16	
18. Technician Setup 	Pages 17	
19. Reports/Printers 	Pages 18	
20. Screen View options	Pages 21-22	
<i>Users are encouraged to continue with the Self Instruction section 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>		



2. > MANAGER SE PROGRAM

Using SE Shop Management Software

Subforums:  SE 7.0 Scheduler,  Upgrade Process,  Database / Settings,  Inventory / Purchase Orders,  Part Catalogs,  Reports / Printing,  Technical Issues,  Tips & Ideas,  Enhancement Requests,  VIN Decode

Managerforum.net is a place where you can interact with Mitchell 1 and others like yourself to get answers to your questions and tips on how to use Manager SE to its fullest. It's one of the best tools in your toolbox."

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

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SPECIAL NOTES: