Manager SE Setup and Orientation Checklist

📺 SE video clips available – Press F1 key [F1] or use [Training Videos] [How do I...] for alphabetized list.

Manager SE Installation	Reference	Done
1. System requirements / PCs verified **prior** to install appt.?	Knowledgebase + SEnsor tool	
2. Customer contacts vendor - Electronic Payment Processing	1st Mile or OpenEdge	
3. O'Reilly's First Call catalog? *[button already visible]* 📺	Vendor Setup - Enter Credentials	
4. Enable additional catalog buttons? *[per customer request]* 📺	Config: Toggle Catalog + Creds	
5. Confirmed local database backup? *[USB drive on host PC]* 📺	Test on Host; MSEC is automatic	
> LEARN – (demo program practice)		
6. Toggle Demo Mode *(confirm user can switch back to live)* 📺	Page 2	
7. How to Enter Customers + Vehicles 📺📺📺📺	Pages 3-5	
8. Create EST > RO > INV Workflow + WIP 📺📺📺📺📺	Pages 6-21	
9. How to Enter Vehicle Recommendations 📺	Pages 22-24	
10. How to Enter Revisions + Sell (Transfer) onto Order 📺📺	Pages 25-31	
Users are encouraged to continue with the Self Instruction section to learn additional program concepts		
> SETUP – (live program)		
11. Create a User *(Profile - stores user preferences)* 📺	Page 1	
12. Shop Data Setup / Default Settings 📺📺	Pages 2-3	
13. Shop Supplies / Hazmat / Disclaimers 📺📺📺	Pages 4-6	
14. Labor Rates / Price Levels / Tax Rates 📺📺📺	Pages 7-8	
15. Income / Payment Types / Std. Accounts / Classes 📺📺📺	Pages 9-10	
16. Markup / Markup Matrix / Markup Concepts 📺📺	Pages 10-13	
17. Scheduler Setup *(Shop Hours, Defaults)* 📺📺📺	Pages 14-18	
18. Technician Setup *(Availability, Pay, Details)* 📺	Pages 19	
19. Reports / Printers + Email Template Editor 📺📺	Pages 20-23	
20. Screen View *(options + preferences)* 📺	Pages 24-25	
Users are encouraged to continue with the Self Instruction section to learn additional program concepts		
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.		

3. > MANAGER SE - BY PROGRAM AREA
SE Shop Management Software by topics
Subforums: 🗋 NEW: Time Manager, 🗋 Scheduler, 🗋 Database + Settings, 🗋 Reports + Printing, 🗋 Parts + Ordering, 🗋 Technical Issues, 🗋 Tips + Ideas, 🗋 Enhancement Requests

Managerforum.net - interact with SE users like yourself to get answers to your questions and tips on how to use SE to full advantage. "one of the best tools in your toolbox." Access from anywhere with a browser + internet connection.

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

NAME OF BUSINESS _____

ACCOUNT # _____

SPECIAL NOTES:

PRINT END USER/ OWNER NAME _____

DATE _____

SIGNATURE END USER/OWNER _____

MITCHELL 1 REP _____