

Shop Management SE Viewer for the Snap-on VERUS[®]
and VERDICT[™] Diagnostic and Information Systems

User's Guide

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Published in the USA

Table of Contents

Product Description	4
Technical Requirements	4
Installation	5
Use of the Shop Management SE Viewer	12
Connecting to a Database	12
Single Database Located	12
Multiple Databases Located	13
No Database Located	13
Navigation	14
The Work in Progress (W.I.P) screen	14
The Order Screen	15
Viewing Line Item Details from the Order Screen	16
Editing a Record	17
Customizing Screen View	20
The Help Menu	26

Product Description

Running on the Snap-on VERUS® or VERDICT™ diagnostics platforms, the Shop Management SE Viewer application allows the service technician to view the next assigned job without the need to leave the service bay. Repair Orders written by the service advisor at the service counter are stored in the shop management database and are transmitted wirelessly to the service bay via the shop's network (requires wireless network hardware). After performing repairs, the technician may return back notes, update the status of the repair, update the mileage out, and update the vehicle's location. The information submitted by the service technician may then be viewed at the front counter by the service advisor.

Technical Requirements

The Shop Management SE Viewer application is supported on Snap-on VERUS and VERDICT Diagnostics scan tool platforms running Software Bundle 10.4 (Version 2.0.0.2158) or later diagnostic module software. Microsoft .NET 2.0 or above must be present on the VERUS or VERDICT.

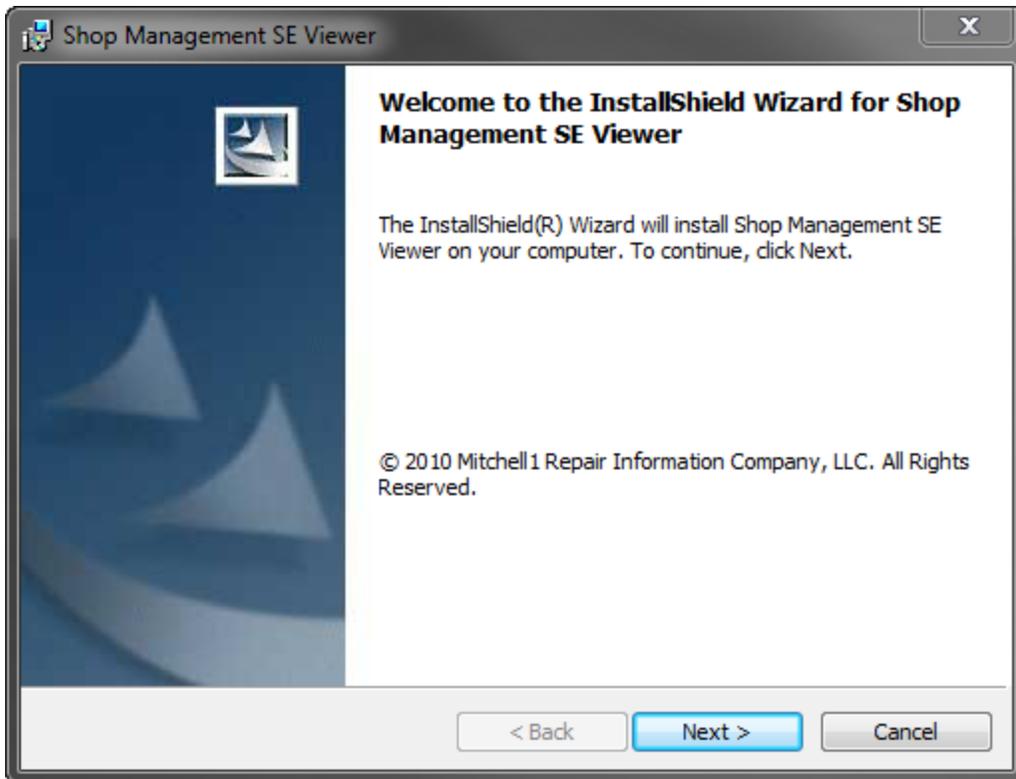
The Shop Management SE Viewer application is compatible with version 6.4 or above of ShopKey Service Writer SE, and Shop Management SE. The Shop Management SE Viewer application is compatible as well with version 6.4 or above of Mitchell 1 Manager SE, and ManagerPlus SE. An active subscription to one of these shop management products is required to make use of the Shop Management SE Viewer.

Installation

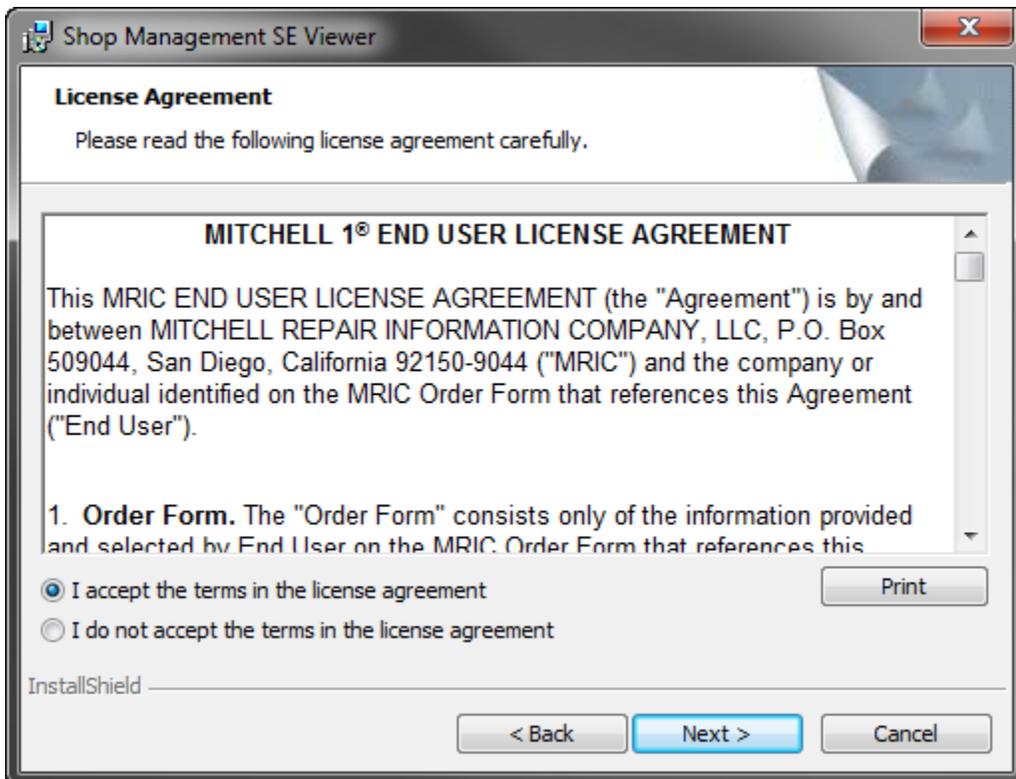
After downloading the Shop Management SE Viewer application, begin the installation by selecting the .exe in the folder you downloaded the file to, or select the icon on your desktop if that was the download destination.



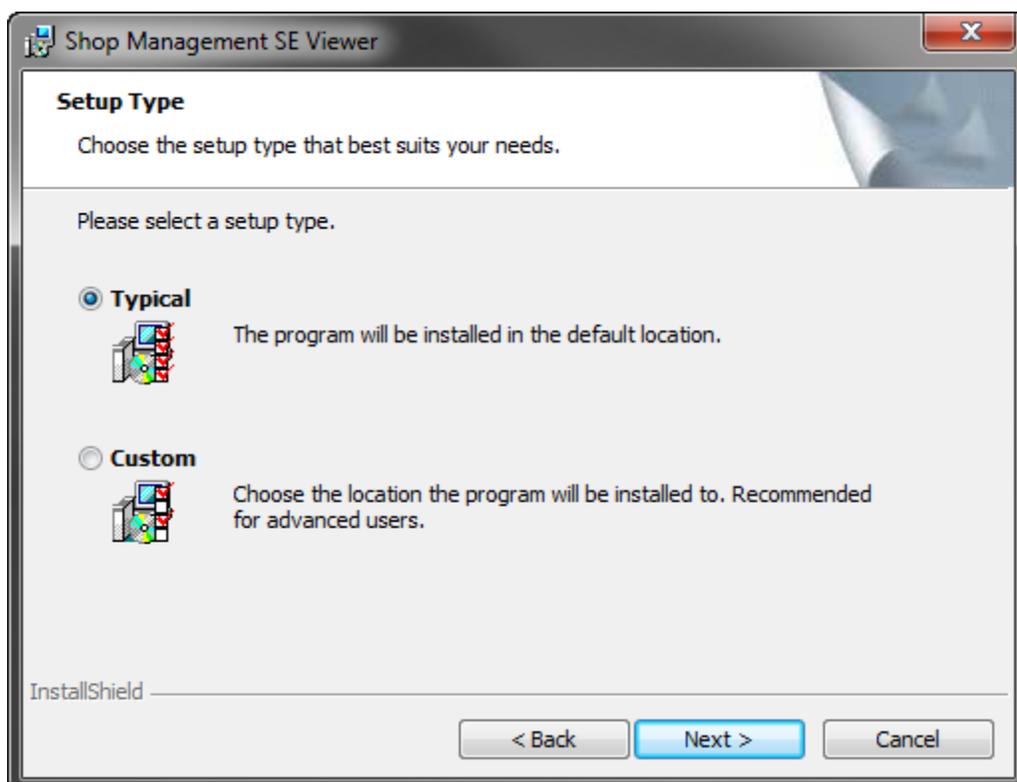
When the InstallShield Window appears, select “Next” to begin installation.

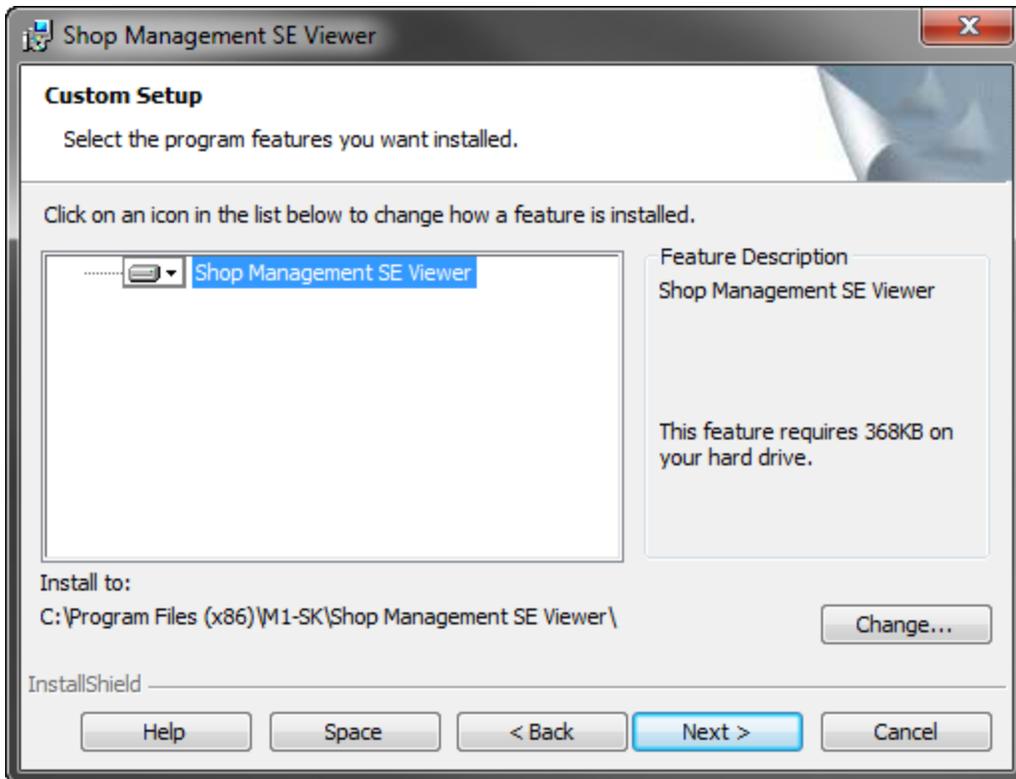


Accept the End User License Agreement and select "Next."

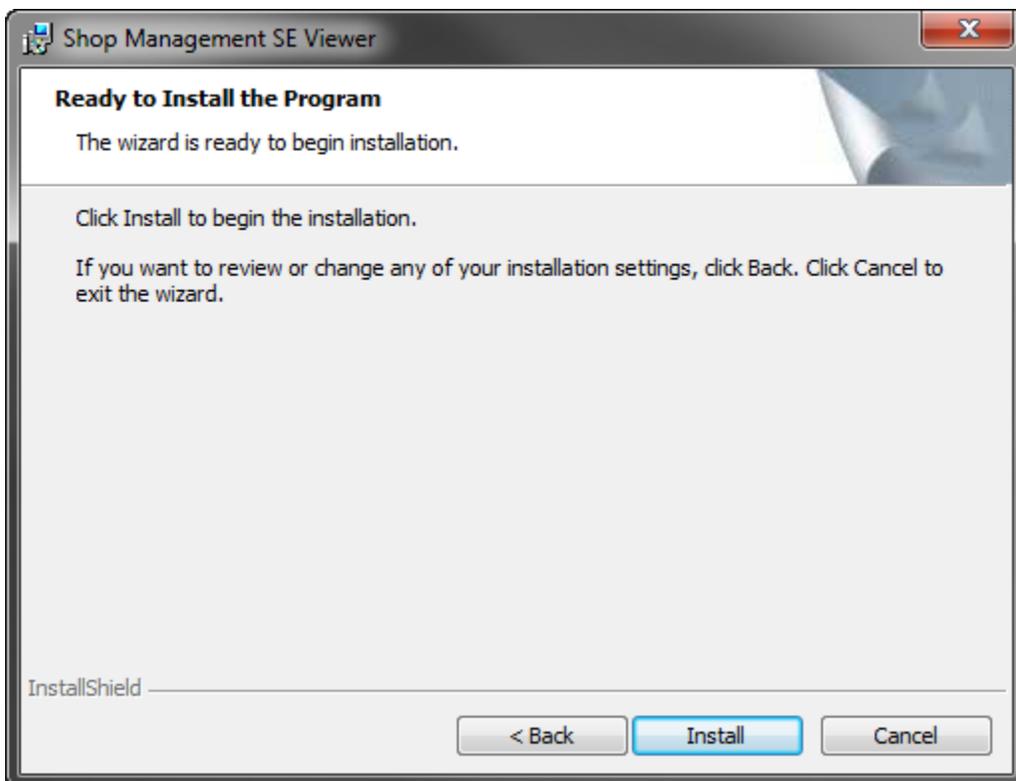


Choose “Typical” then “Next” to install in the standard folder location. Or, select “Custom” and choose a custom install destination.

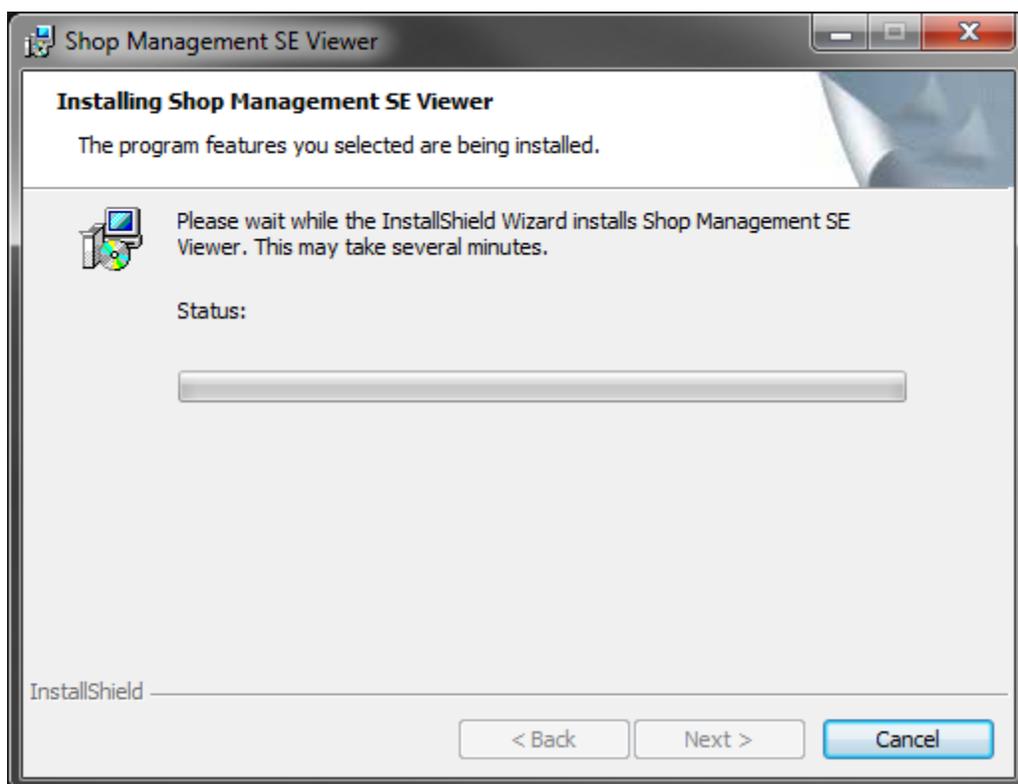




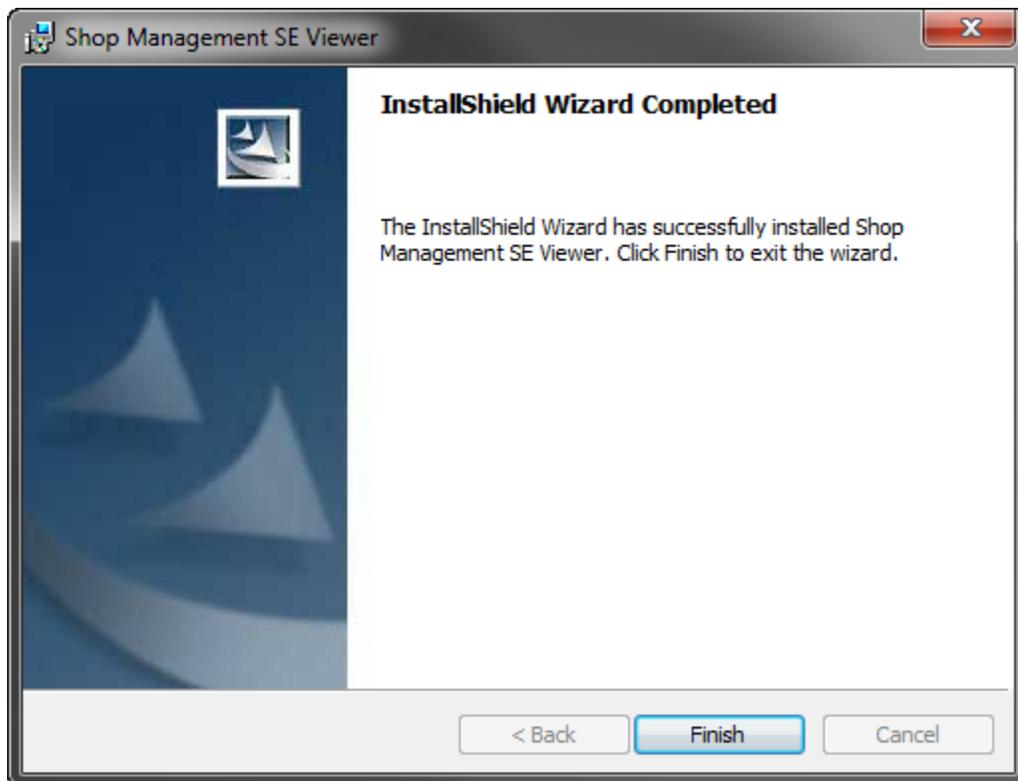
Click "Install."



If required prerequisite applications are not found on your computer, these will automatically be installed.



Click “Finish” to complete the installation process.



Use of the Shop Management SE Viewer

Connecting to a Database

When the Shop Management SE Viewer application is opened for the first time, a connection must be established with a Shop Management SE database on the network.

To open the Shop Management SE Viewer application, click on the icon on your desktop, or select the program through your Windows START menu.

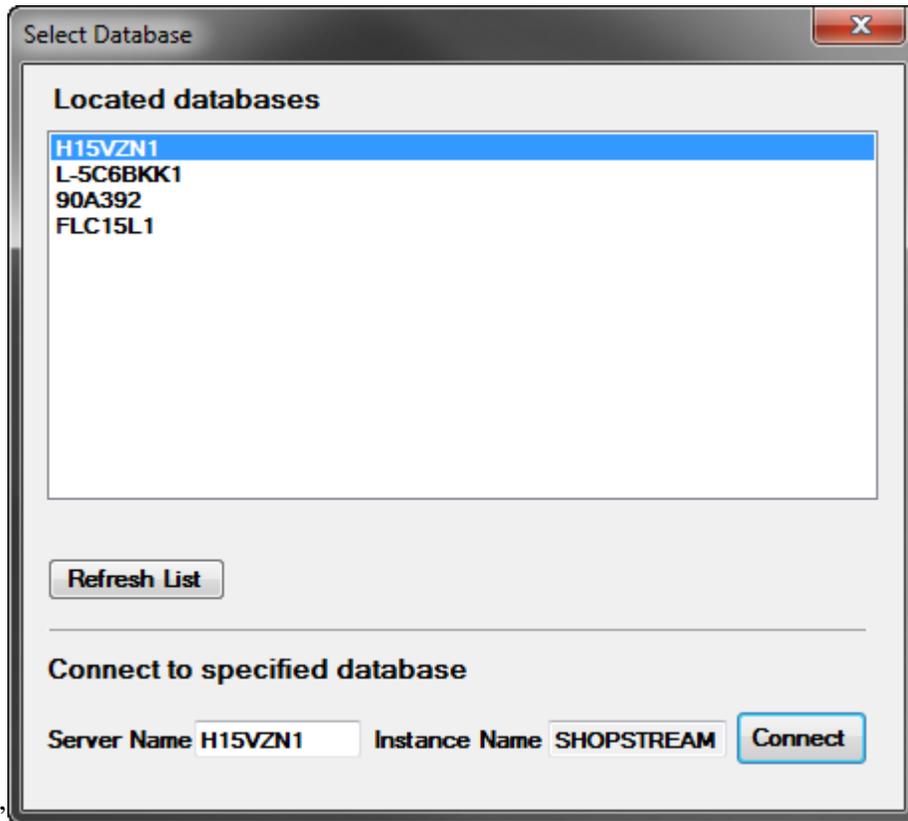


Single Database Located

The application will search the connected network for a Shop Management SE system database and if one is located the application will automatically connect to this database and save this database as the default for future connections.

Multiple Databases Located

If instead, more than one database is located in the connected network, you will be prompted to select from the list. Once a database is selected from the list, select

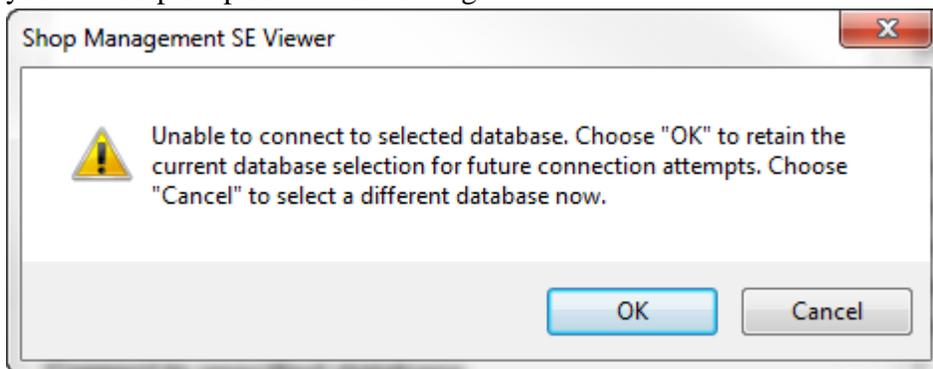


“Connect.”

No Database Located

If instead, no databases are located in the connected network, you will be prompted with a blank selection list. You may manually enter the “Server Name” and the “Instance Name.” Once entered select “Connect.”

When the database connection is established you will be presented with the Work In Progress (W.I.P) screen. If the application cannot establish a connection to the database you have selected you will be prompted with a warning.



Navigation

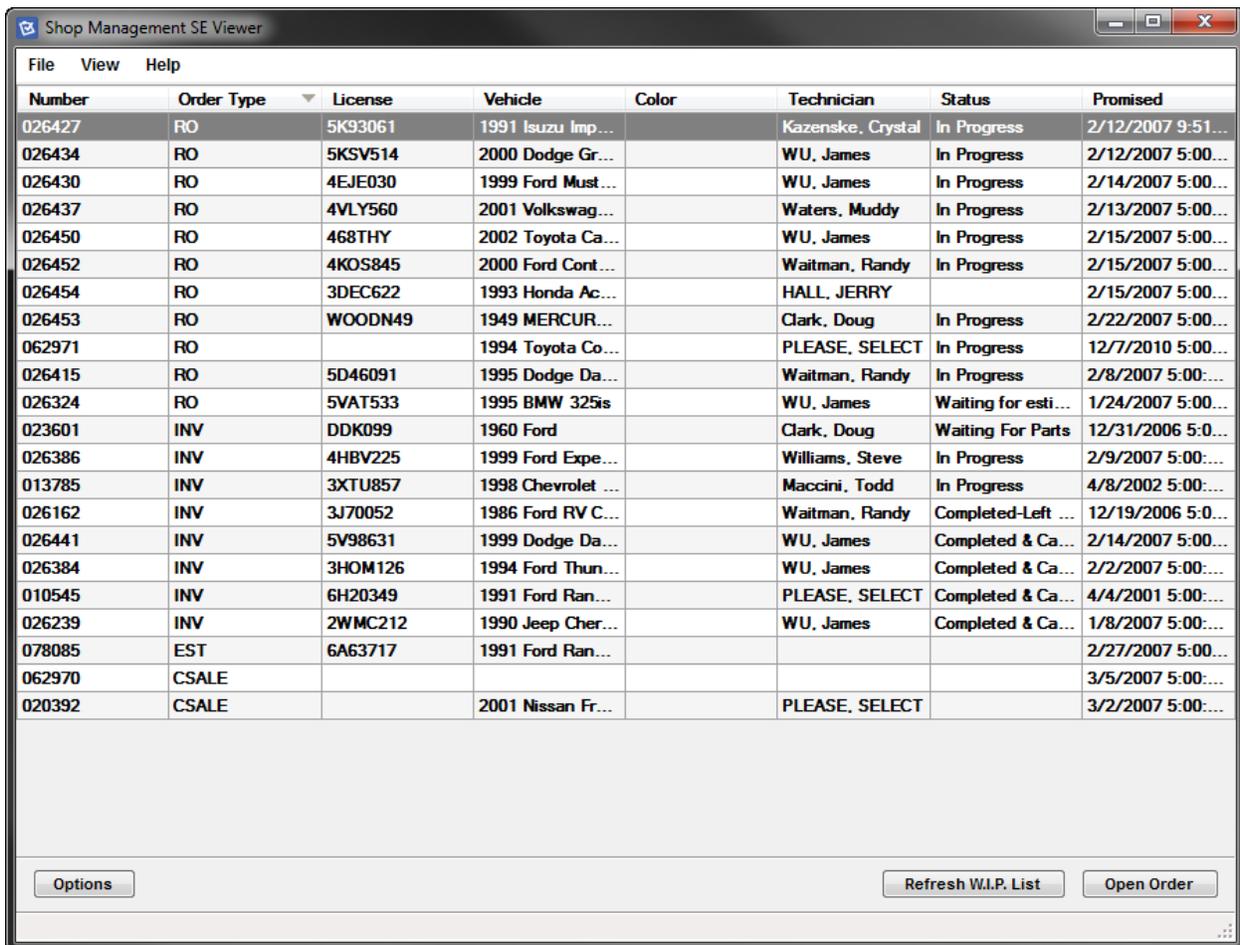
You may navigate using a mouse, a pen stylus, or with a keyboard (space bar, tab button, and up and down arrow keys).

The Work in Progress (W.I.P) screen

When the application opens and a database connection is established you will be presented with the Work In Progress (W.I.P) screen.

The work in progress screen shows all the Estimates, Repair Orders, Invoices, Special Orders, and Counter Sales in the Shop Management SE database.

“Refresh W.I.P” list refreshes the display to show the most current data available from the Shop Management SE database.



The screenshot shows a window titled "Shop Management SE Viewer" with a menu bar (File, View, Help) and a table of work in progress items. The table has columns for Number, Order Type, License, Vehicle, Color, Technician, Status, and Promised. Below the table are three buttons: Options, Refresh W.I.P. List, and Open Order.

Number	Order Type	License	Vehicle	Color	Technician	Status	Promised
026427	RO	5K93061	1991 Isuzu Imp...		Kazenske, Crystal	In Progress	2/12/2007 9:51...
026434	RO	5KSV514	2000 Dodge Gr...		WU, James	In Progress	2/12/2007 5:00...
026430	RO	4EJE030	1999 Ford Must...		WU, James	In Progress	2/14/2007 5:00...
026437	RO	4VLY560	2001 Volkswag...		Waters, Muddy	In Progress	2/13/2007 5:00...
026450	RO	468THY	2002 Toyota Ca...		WU, James	In Progress	2/15/2007 5:00...
026452	RO	4KOS845	2000 Ford Cont...		Waitman, Randy	In Progress	2/15/2007 5:00...
026454	RO	3DEC622	1993 Honda Ac...		HALL, JERRY		2/15/2007 5:00...
026453	RO	WOODN49	1949 MERCUR...		Clark, Doug	In Progress	2/22/2007 5:00...
062971	RO		1994 Toyota Co...		PLEASE, SELECT	In Progress	12/7/2010 5:00...
026415	RO	5D46091	1995 Dodge Da...		Waitman, Randy	In Progress	2/8/2007 5:00...
026324	RO	5VAT533	1995 BMW 325is		WU, James	Waiting for esti...	1/24/2007 5:00...
023601	INV	DDK099	1960 Ford		Clark, Doug	Waiting For Parts	12/31/2006 5:0...
026386	INV	4HBV225	1999 Ford Expe...		Williams, Steve	In Progress	2/9/2007 5:00...
013785	INV	3XTU857	1998 Chevrolet ...		Maccini, Todd	In Progress	4/8/2002 5:00...
026162	INV	3J70052	1986 Ford RV C...		Waitman, Randy	Completed-Left ...	12/19/2006 5:0...
026441	INV	5V98631	1999 Dodge Da...		WU, James	Completed & Ca...	2/14/2007 5:00...
026384	INV	3HOM126	1994 Ford Thun...		WU, James	Completed & Ca...	2/2/2007 5:00...
010545	INV	6H20349	1991 Ford Ran...		PLEASE, SELECT	Completed & Ca...	4/4/2001 5:00...
026239	INV	2WMC212	1990 Jeep Cher...		WU, James	Completed & Ca...	1/8/2007 5:00...
078085	EST	6A63717	1991 Ford Ran...				2/27/2007 5:00...
062970	CSALE						3/5/2007 5:00...
020392	CSALE		2001 Nissan Fr...		PLEASE, SELECT		3/2/2007 5:00...

The Order Screen

From the W.I.P screen, double clicking a line item, or highlighting the line item and selecting “Open Order” changes the view to the Order screen.

Shop Management SE Viewer

File View Help

1991 Isuzu Impulse XS Eng: Color: Hat #: 30
VIN: 1GDJ7H1P3MJ513829 Lic: 5K93061 Odom. In: 175800 Customer: Clark, Gary

Written By: Waitman, Randy Promised: 9:51 AM 02/12/2007 **Approved Order # 026427**

Description	Pay Hrs	Qty	Part No.	Tech Name
Package: VIP #1	6.00			Kazenske, Cry...
rtert	0.00			
Belt - Fan & Power Steering		1.00	4017453	Waters, Muddy
Belt - Fan & Power Steering		1.00	257455	Waters, Muddy
Belt - Fan, A/C & Power Steering		1.00	4017603	Waters, Muddy
Belt - Fan, A/C & Power Steering		1.00	257603	Waters, Muddy
Belt - Fan, Alternator & Vacuum Pump		1.00	4017490	Waters, Muddy
Belt - Fan, Alternator & Vacuum Pump		1.00	257490	Waters, Muddy
Timing Set - 3 Piece		1.00	103074	Waters, Muddy

Status: Odom. Out: Location:

Viewing Line Item Details from the Order Screen

Double clicking on a line item or highlighting a line item and selecting “Open” displays additional detail. When a line item is opened it can be viewed but not edited.

The screenshot displays the Shop Management SE Viewer interface. At the top, the window title is "Shop Management SE Viewer". Below the title bar is a menu bar with "File", "View", and "Help".

The main area shows order details for a 1991 Isuzu Impulse XS. The VIN is 1GDJ7H1P3MJ513829. The license is 5K93061. The odometer is 175800. The customer is Gary Clark. The order was written by Randy Waitman and is approved, with order number 026427. The promised date is 9:51 AM on 02/12/2007.

A table lists the order items:

Description	Pay Hrs	Qty	Part No.	Tech Name
Package: VIP #1	6.00			Kazenske, Cry...
Part	0.00			
Belt - Fan & Power Steering		1.00	4017453	Waters, Muddy
Belt - Fan & Power Steering		1.00	257455	Waters, Muddy
Belt - Fan, A/C & Power Steer			603	Waters, Muddy
Belt - Fan, A/C & Power Steer			03	Waters, Muddy
Belt - Fan, Alternator & Vacu			490	Waters, Muddy
Belt - Fan, Alternator & Vacu			90	Waters, Muddy
Timing Set - 3 Piece			74	Waters, Muddy

A "Part Item" dialog box is open, showing details for the selected item:

- Part Description: Belt - Fan & Power Steering
- Part No.: 4017453
- Quantity: 1.00
- Technician: Waters, Muddy
- Ref/Inv #: (empty field)

At the bottom of the main window, there are several controls: a "Status" dropdown menu set to "In Progress", an "Odom. Out" field with the value "0", a "Location" dropdown menu set to "Muddy", and three buttons: "Add Note", "Open", and "Exit Order".

Editing a Record

The “Status” of the Order, the vehicle “Odometer Out”, and “Vehicle Location” may all be edited from within the Shop Management SE Viewer using the selections on the bottom bar of the Order screen.

Shop Management SE Viewer

File View Help

1991 Isuzu Impulse XS Eng: Color: Hat #: 30
VIN: 1GDJ7H1P3MJ513829 Lic: 5K93061 Odom. In: 175800 Customer: Clark, Gary

Written By: Waitman, Randy Promised: 9:51 AM 02/12/2007 **Approved Order # 026427**

Description	Pay Hrs	Qty	Part No.	Tech Name
Package: VIP #1	6.00			Kazenske, Cry...
rtert	0.00			
Belt - Fan & Power Steering		1.00	4017453	Waters, Muddy
Belt - Fan & Power Steering		1.00	257455	Waters, Muddy
Belt - Fan, A/C & Power Steering		1.00	4017603	Waters, Muddy
Belt - Fan, A/C & Power Steering		1.00	257603	Waters, Muddy
Belt - Fan, Alternator & Vacuum Pump		1.00	4017490	Waters, Muddy
Belt - Fan, At Bodyworks		1.00	257490	Waters, Muddy
Timing S		1.00	103074	Waters, Muddy

Status: In Progress Odom. Out: 0 Location: Muddy Add Note Open Exit Order

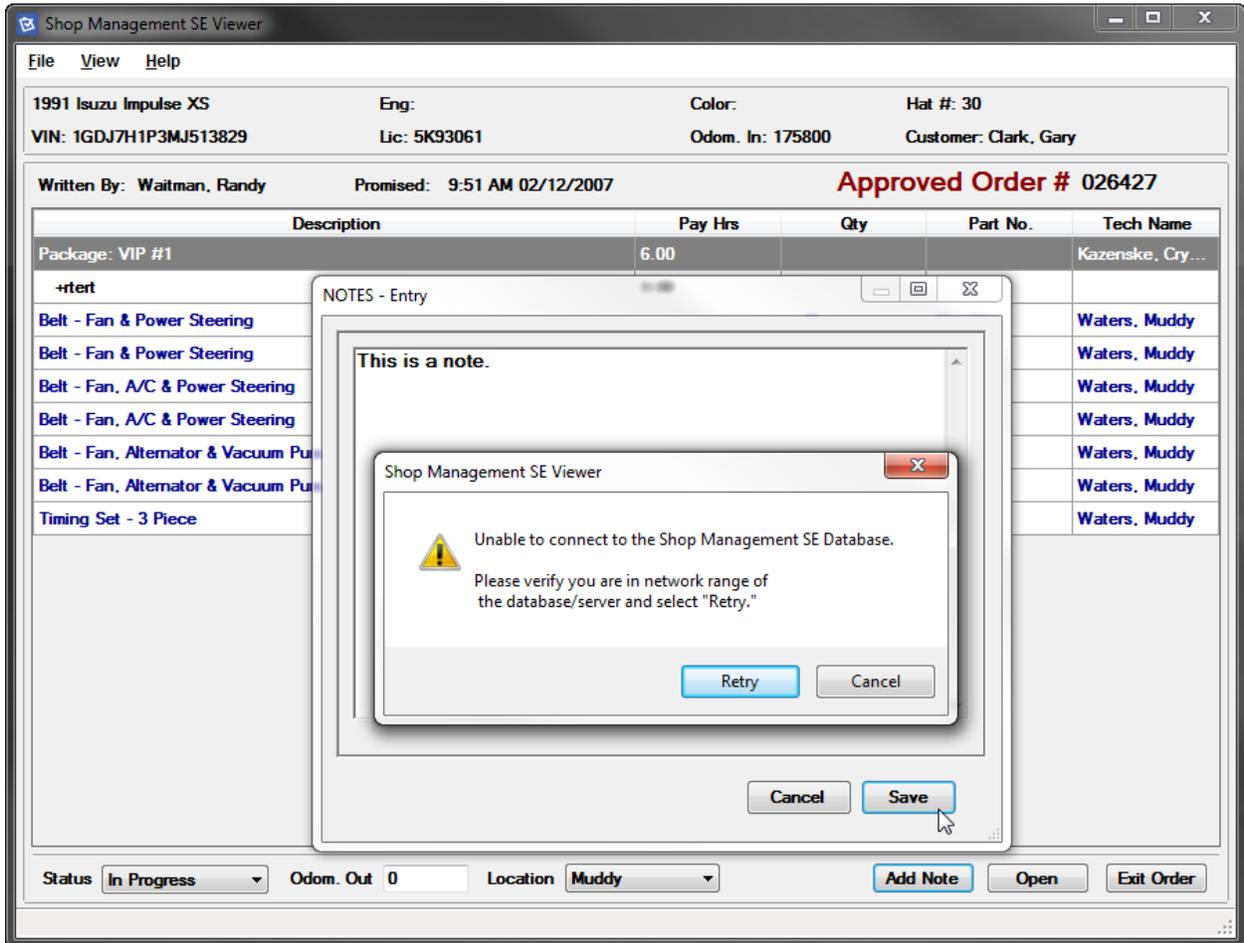
- Completed
- Completed & Called
- Completed-Left mes
- Completed-no answer
- Completed-not called
- Customer Waiting
- In Progress
- In Progress + 1 day
- Lein Sale pending
- Need to assign tech
- Need to talk to tech
- Off location storage
- On Hold
- Parts / overnight
- Waiting For Approval
- Waiting for Car
- Waiting for estimate
- Waiting For Parts**
- Waiting for Payment
- Waiting For Service
- Waiting for Sublet

Notes may be added to an Order by selecting “Add Note.”

The screenshot shows the 'Shop Management SE Viewer' application window. At the top, it displays vehicle information: 1991 Isuzu Impulse XS, VIN: 1GDJ7H1P3MJ513829, License: 5K93061, Odometer: 175800, and Customer: Clark, Gary. Below this, it shows 'Written By: Waitman, Randy' and 'Promised: 9:51 AM 02/12/2007'. A prominent red label indicates 'Approved Order # 026427'. The main area contains a table with columns for Description, Pay Hrs, Qty, Part No., and Tech Name. A list of parts is visible, including 'Belt - Fan & Power Steering' and 'Timing Set - 3 Piece'. A 'NOTES - Entry' dialog box is open in the center, containing a text area with the text 'This is a note.' and a cursor. The dialog has 'Cancel' and 'Save' buttons. At the bottom of the main window, there is a status bar with 'Status' set to 'In Progress', 'Odom. Out' set to '0', and 'Location' set to 'Muddy'. There are also buttons for 'Add Note', 'Open', and 'Exit Order'.

Description	Pay Hrs	Qty	Part No.	Tech Name
Package: VIP #1	6.00			Kazenske, Cry...
rtert				
Belt - Fan & Power Steering				Waters, Muddy
Belt - Fan & Power Steering				Waters, Muddy
Belt - Fan, A/C & Power Steering				Waters, Muddy
Belt - Fan, A/C & Power Steering				Waters, Muddy
Belt - Fan, Alternator & Vacuum Pu				Waters, Muddy
Belt - Fan, Alternator & Vacuum Pu				Waters, Muddy
Timing Set - 3 Piece				Waters, Muddy

If the connection to the database has been lost temporarily a warning message will be displayed when attempting to save a Note. You will need to move within wireless range if you are operating a wireless network. When you have re-established connection to the database select "Retry" and your Note will be saved.



Customizing Screen View

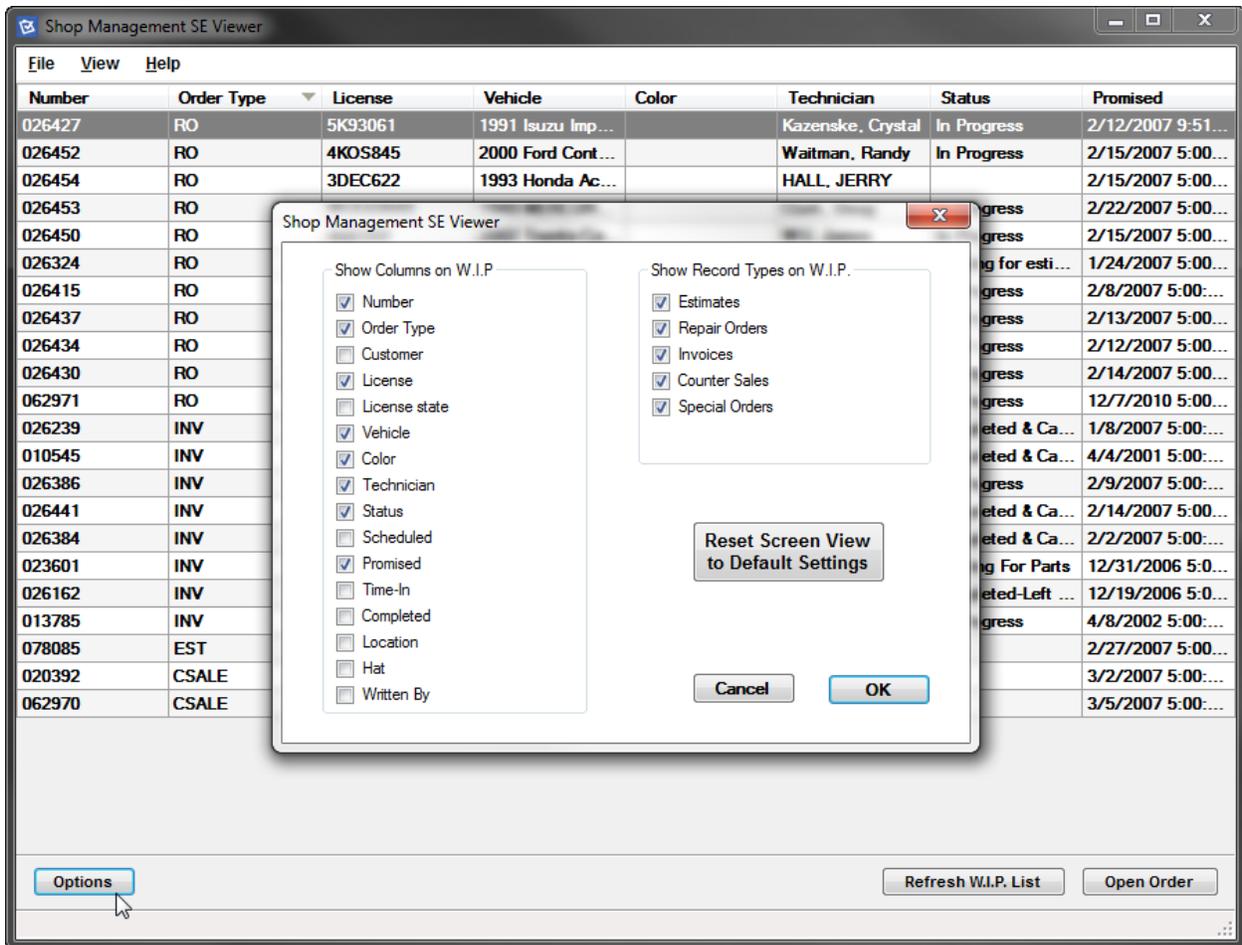
Screen view settings may be customized to the user's preference. These settings will be retained at application shut down and restart.

Through the "Options" button, the W.I.P. grid may be customized to show or not show the following columns:

- Number
- Order Type
- Customer
- License
- License State
- Vehicle
- Color
- Technician
- Status
- Scheduled
- Promised
- Time-In
- Completed
- Location
- Hat
- Written By

Through the "Options" button, the W.I.P. grid may be customized to show or not show the following Record Types:

- Estimates
- Repair Orders
- Invoices
- Counter Sales
- Special Orders



Columns on the W.I.P grid (not the Order grid) may be sorted by single left mouse-clicking on the column header. It's possible to sort up to 3 columns at once by holding down the Control

(Ctrl) key on the keyboard while simultaneously mouse-clicking on the columns you wish to be sorted.

Shop Management SE Viewer

Number	Order Type	License	Vehicle	Color	Technician	Status	Promised
078085	EST	6A63717	1991 Ford Ran...				2/27/2007 5:00...
062971	RO		1994 Toyota Co...		PLEASE, SELECT	In Progress	12/7/2010 5:00...
062970	CSALE						3/5/2007 5:00:...
026454	RO	3DEC622	1993 Honda Ac...		HALL, JERRY		2/15/2007 5:00...
026453	RO	WOODN49	1949 MERCUR...		Clark, Doug	In Progress	2/22/2007 5:00...
026452	RO	4KOS845	2000 Ford Cont...		Waitman, Randy	In Progress	2/15/2007 5:00...
026450	RO	468THY	2002 Toyota Ca...		WU, James	In Progress	2/15/2007 5:00...
026441	INV	5V98631	1999 Dodge Da...		WU, James	Completed & Ca...	2/14/2007 5:00...
026437	RO	4VLY560	2001 Volkswag...		Waters, Muddy	In Progress	2/13/2007 5:00...
026434	RO	5KSV514	2000 Dodge Gr...		WU, James	In Progress	2/12/2007 5:00...
026430	RO	4EJE030	1999 Ford Must...		WU, James	In Progress	2/14/2007 5:00...
026427	RO	5K93061	1991 Isuzu Imp...		Kazenske, Crystal	In Progress	2/12/2007 9:51...
026415	RO	5D46091	1995 Dodge Da...		Waitman, Randy	In Progress	2/8/2007 5:00:...
026386	INV	4HBV225	1999 Ford Expe...		Williams, Steve	In Progress	2/9/2007 5:00:...
026384	INV	3HOM126	1994 Ford Thun...		WU, James	Completed & Ca...	2/2/2007 5:00:...
026324	RO	5VAT533	1995 BMW 325is		WU, James	Waiting for esti...	1/24/2007 5:00:...
026239	INV	2WMC212	1990 Jeep Cher...		WU, James	Completed & Ca...	1/8/2007 5:00:...
026162	INV	3J70052	1986 Ford RV C...		Waitman, Randy	Completed-Left ...	12/19/2006 5:0...
023601	INV	DDK099	1960 Ford		Clark, Doug	Waiting For Parts	12/31/2006 5:0...
020392	CSALE		2001 Nissan Fr...		PLEASE, SELECT		3/2/2007 5:00:...
013785	INV	3XTU857	1998 Chevrolet ...		Maccini, Todd	In Progress	4/8/2002 5:00:...
010545	INV	6H20349	1991 Ford Ran...		PLEASE, SELECT	Completed & Ca...	4/4/2001 5:00:...

Options Refresh W.I.P. List Open Order

Columns may be repositioned on both the W.I.P. grid and the Order grid by left mouse-clicking on the column heading. Click and hold while simultaneously dragging the column to the positioning of your choice.

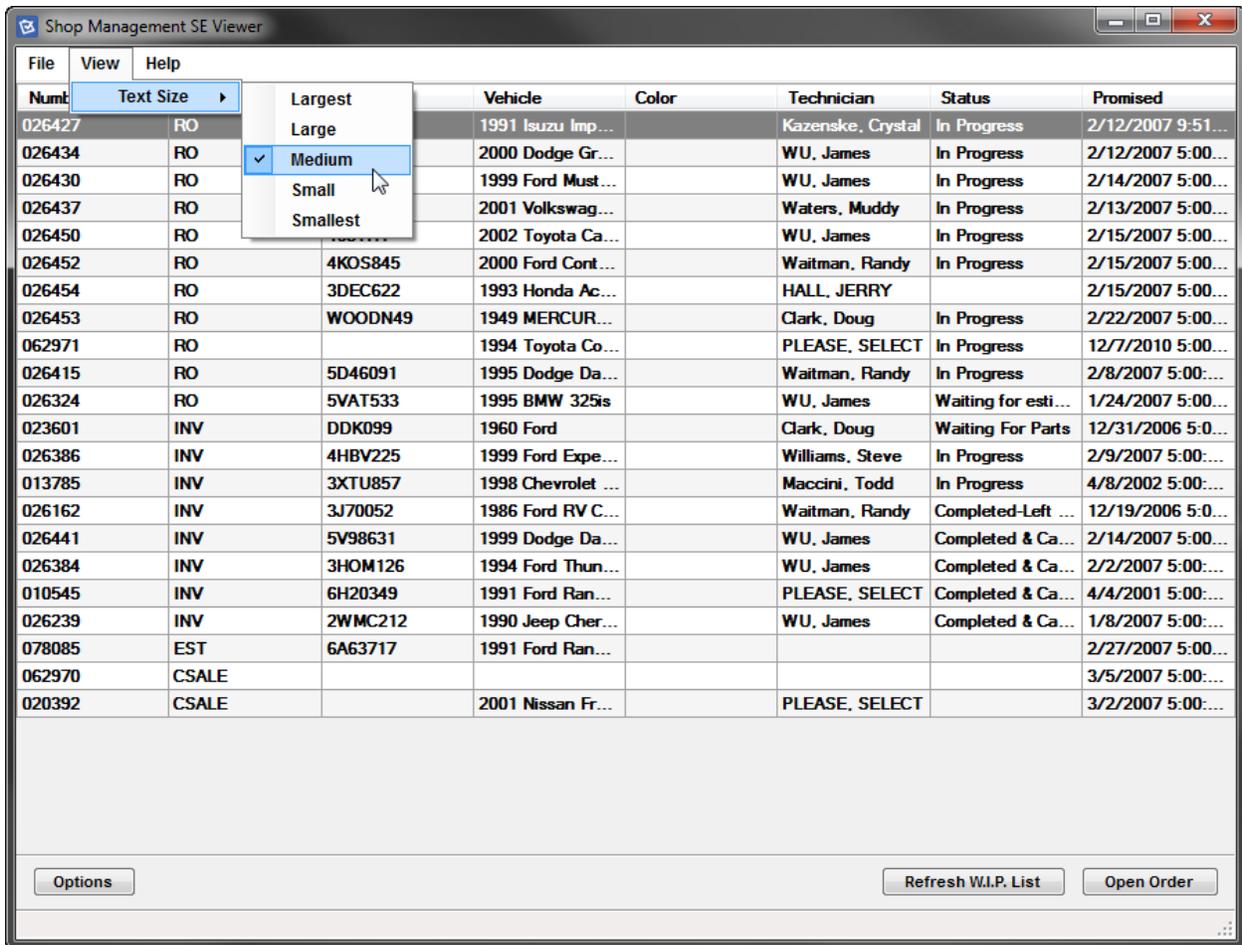
Shop Management SE Viewer

File View Help

Number	Order Type	License	Vehicle	Color	Technician	Status	Promised
026427	RO	5K9306	1991 Isuzu Imp...		Kazenske, Crystal	In Progress	2/12/2007 9:51...
026452	RO	4KOS845	2000 Ford Cont...		Waitman, Randy	In Progress	2/15/2007 5:00...
026454	RO	3DEC622	1993 Honda Ac...		HALL, JERRY		2/15/2007 5:00...
026453	RO	WOODN49	1949 MERCUR...		Clark, Doug	In Progress	2/22/2007 5:00...
026450	RO	468THY	2002 Toyota Ca...		WU, James	In Progress	2/15/2007 5:00...
026324	RO	5VAT533	1995 BMW 325is		WU, James	Waiting for esti...	1/24/2007 5:00...
026415	RO	5D46091	1995 Dodge Da...		Waitman, Randy	In Progress	2/8/2007 5:00...
026437	RO	4VLY560	2001 Volkswag...		Waters, Muddy	In Progress	2/13/2007 5:00...
026434	RO	5KSV514	2000 Dodge Gr...		WU, James	In Progress	2/12/2007 5:00...
026430	RO	4EJE030	1999 Ford Must...		WU, James	In Progress	2/14/2007 5:00...
062971	RO		1994 Toyota Co...		PLEASE, SELECT	In Progress	12/7/2010 5:00...
026239	INV	2WMC212	1990 Jeep Cher...		WU, James	Completed & Ca...	1/8/2007 5:00...
010545	INV	6H20349	1991 Ford Ran...		PLEASE, SELECT	Completed & Ca...	4/4/2001 5:00...
026386	INV	4HBV225	1999 Ford Expe...		Williams, Steve	In Progress	2/9/2007 5:00...
026441	INV	5V98631	1999 Dodge Da...		WU, James	Completed & Ca...	2/14/2007 5:00...
026384	INV	3HOM126	1994 Ford Thun...		WU, James	Completed & Ca...	2/2/2007 5:00...
023601	INV	DDK099	1960 Ford		Clark, Doug	Waiting For Parts	12/31/2006 5:0...
026162	INV	3J70052	1986 Ford RV C...		Waitman, Randy	Completed-Left ...	12/19/2006 5:0...
013785	INV	3XTU857	1998 Chevrolet ...		Maccini, Todd	In Progress	4/8/2002 5:00...
078085	EST	6A63717	1991 Ford Ran...				2/27/2007 5:00...
020392	CSALE		2001 Nissan Fr...		PLEASE, SELECT		3/2/2007 5:00...
062970	CSALE						3/5/2007 5:00...

Options Refresh W.I.P. List Open Order

The "Text Size" option under the "View" menu changes the text size on the W.I.P. and Order screens



All custom settings are erased by selecting the “Reset Screen View to Default Settings” button under “Options.”

Shop Management SE Viewer

File View Help

Number	Order Type	License	Vehicle	Color	Technician	Status	Promised
026427	RO	5K93061	1991 Isuzu Imp...		Kazenske, Crystal	In Progress	2/12/2007 9:51...
026452	RO	4KOS845	2000 Ford Cont...		Waitman, Randy	In Progress	2/15/2007 5:00...
026454	RO	3DEC622	1993 Honda Ac...		HALL, JERRY		2/15/2007 5:00...
026453	RO					gress	2/22/2007 5:00...
026450	RO					gress	2/15/2007 5:00...
026324	RO					ing for esti...	1/24/2007 5:00...
026415	RO					gress	2/8/2007 5:00:...
026437	RO					gress	2/13/2007 5:00:...
026434	RO					gress	2/12/2007 5:00:...
026430	RO					gress	2/14/2007 5:00:...
062971	RO					gress	12/7/2010 5:00:...
026239	INV					eted & Ca...	1/8/2007 5:00:...
010545	INV					eted & Ca...	4/4/2001 5:00:...
026386	INV					gress	2/9/2007 5:00:...
026441	INV					eted & Ca...	2/14/2007 5:00:...
026384	INV					eted & Ca...	2/2/2007 5:00:...
023601	INV					ig For Parts	12/31/2006 5:0...
026162	INV					eted-Left ...	12/19/2006 5:0...
013785	INV					gress	4/8/2002 5:00:...
078085	EST						2/27/2007 5:00:...
020392	CSALE						3/2/2007 5:00:...
062970	CSALE						3/5/2007 5:00:...

Shop Management SE Viewer

Show Columns on W.I.P.

- Number
- Order Type
- Customer
- License
- License state
- Vehicle
- Color
- Technician
- Status
- Scheduled
- Promised
- Time-In
- Completed
- Location
- Hat
- Written By

Show Record Types on W.I.P.

- Estimates
- Repair Orders
- Invoices
- Counter Sales
- Special Orders

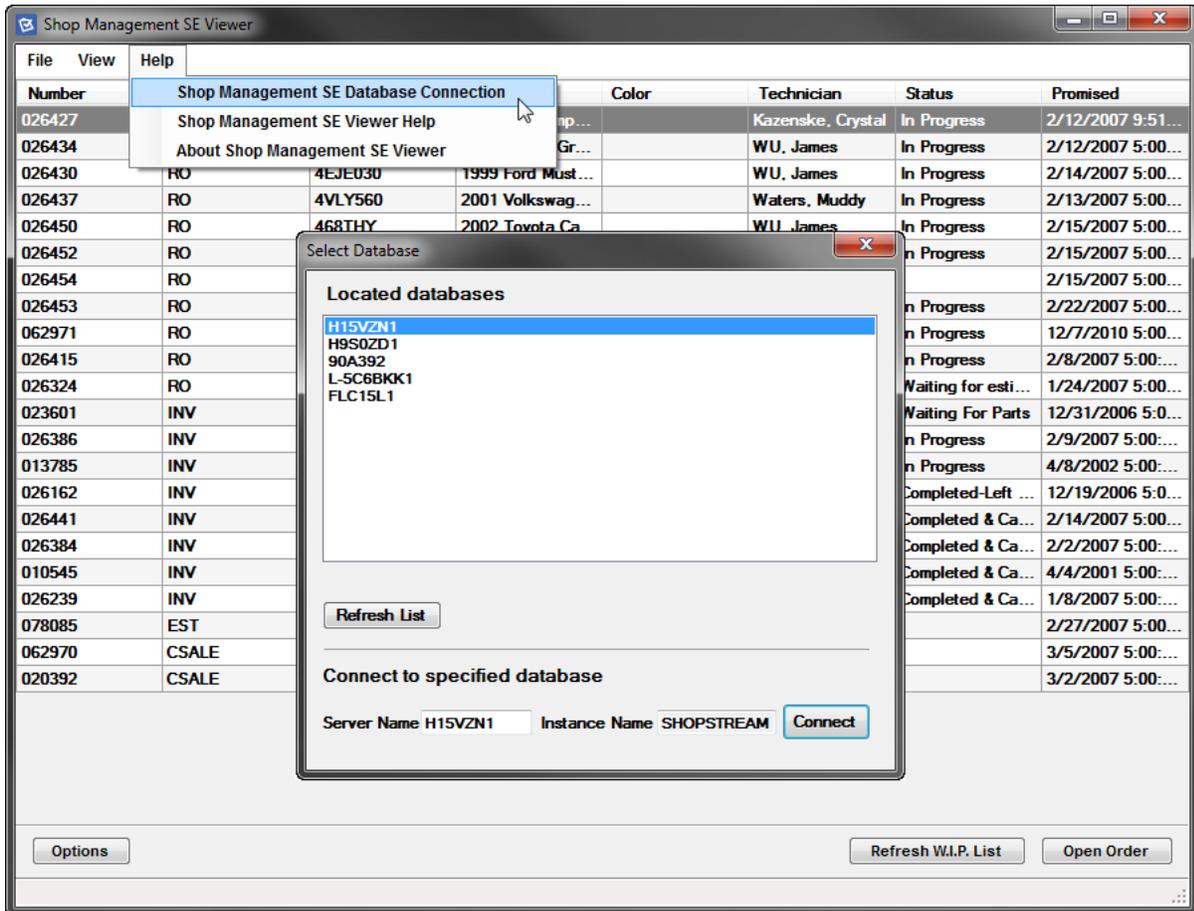
Reset Screen View to Default Settings

Cancel OK

Options Refresh W.I.P. List Open Order

The Help Menu

Under the “Help” menu, select “Shop Management SE Database Connection” to view the currently connected database or to select another.



Selecting “Shop Management SE Viewer Help” opens an internet browser page and automatically navigates to the online help system.

