



Checkmate[®]

Inventory Management System

Sales Pro User Guide

Car-Part.com



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Introduction

Checkmate Sales Pro provides a modern and intuitive sales workflow. It's designed from the ground up to be optimized for Car-Part.com, Images, eBay, eCommerce, and multi-part sales. It's fast and easy to use. With the Checkmate Sales Pro enhanced interface, you can:

- View customer history
- Open quotes, returns, credits, and payment history while making your sale
- Easily sell multiple parts at once
- Customize your search results screen with vehicle images, part images, Car-Part.com request data, and much, much more
- Create quotes, work orders, invoices, credits, and returns with just one click or keystroke
- Automatically create purchase orders
- Email barcoded invoices

This guide covers the Checkmate Sales Pro workflow.

Common Workflows

The workflows in this section give a broad overview of the main functions of Sales Pro. For detailed information about each tab in Sales Pro, please refer to the later sections of this guide.

Selling Parts from Inventory

To sell a part from your inventory, follow these steps:

1. On the **Find** tab, enter the customer and part(s) you need to look up.
2. After you enter your search criteria, press **Enter** or click the green **Find** button.

The screenshot shows the 'Find' tab in SalesPro. The search criteria are: Customer: AUTO BODY PRO, Part: CAMRY, and Year: 2005. The 'Research' section includes fields for Quote #, Work Order #, Invoice #, Purchase Order #, Interchange, Customers, and Pick Slip #. A summary table at the bottom shows credit limits and sales statistics.

	\$Balance	\$Sales	\$Credits	\$Returns	\$Avg Net	#Request	#Quotes	#Sales	#Credits	#Returns
0-30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
31-60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
61-90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Over 90	\$0.00									
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	21652	0	0
Current Year		\$12,050.0	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Prior Year	\$3.00	\$206.50	\$0.00	\$0.00	\$0.00	0	0	0	0	0

3. The **Interchange** tab opens with interchange options for the part(s). Check to select interchange numbers and then click **Search Inventory**.

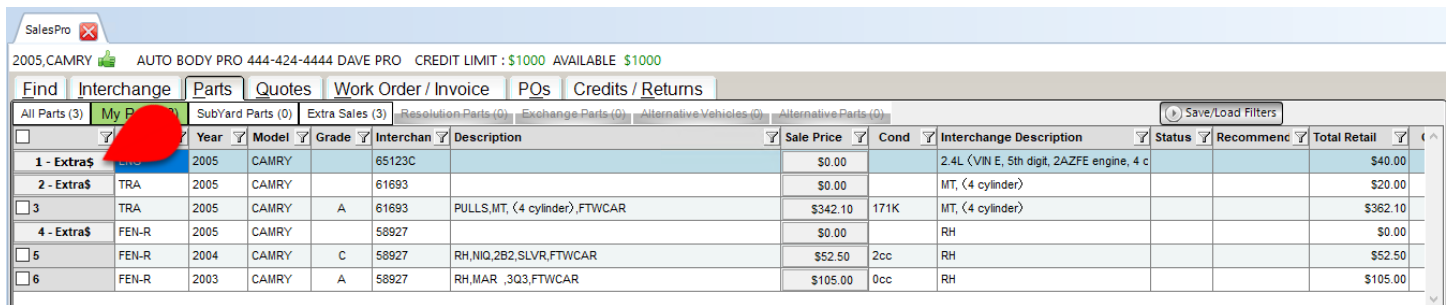
The screenshot shows the 'Interchange' tab in SalesPro. It displays a list of parts with columns for Interchange, QOH, Retail, Wholesale, Request, CPLocalReq, CPreReq, CPGlobalReq, Sales, NIStock, and ListPrice. The 'ENG' and 'TRA' sections are expanded, showing various engine and transmission options. The 'FENDER' section is also expanded, showing LH and RH options. The '12' and '17' options are selected.

Interchange Description	Interchange	QOH	Retail	Wholesale	Request	CPLocalReq	CPreReq	CPGlobalReq	Sales	NIStock	ListPrice
ENG (2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder))											
<input checked="" type="checkbox"/> 1) California (Federal)	65123C	0	\$1260.00	\$1200.15	0	194	1278	5291	0	0	\$10255.00
<input type="checkbox"/> 4) 3.0L (VIN F, 5th digit, 1MZFE engine, 6 cylinder)	65131	1	\$415.78	\$395.98	0	103	679	2477	0	0	\$0.00
<input type="checkbox"/> 5) 3.3L (VIN A, 5th digit, 3MZFE engine, 6 cylinder)	65033	0	\$310.60	\$295.81	0	190	1223	4603	0	0	\$0.00
<input type="checkbox"/> 6) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 7) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 8) Non-Interchange SY-EY	NOICSYEY										
TRA (AT)											
<input type="checkbox"/> 9) 4 cylinder (6 cylinder)	62023	1	\$288.75	\$275.00	0	42	427	1553	0	0	\$0.00
<input type="checkbox"/> 10) 3.0L (1MZFE engine)	61598A	1	\$157.50	\$150.00	0	35	253	1231	0	0	\$4146.00
<input type="checkbox"/> 11) 3.3L (3MZFE engine)	61598C	0	\$708.75	\$675.19	0	5	57	376	0	0	\$4435.00
TRA (MT)											
<input checked="" type="checkbox"/> 12) (4 cylinder)	61693	1	\$342.10	\$325.81	0	8	77	310	0	0	\$2570.00
<input type="checkbox"/> 13) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 14) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 15) Non-Interchange SY-EY	NOICSYEY										
FENDER (FEN)											
<input type="checkbox"/> 16) LH	58928	4	\$105.00	\$100.26	0	95	657	1917	0	0	\$344.00
<input checked="" type="checkbox"/> 17) RH	58927	1	\$105.00	\$100.26	0	86	552	1618	0	0	\$344.00
<input type="checkbox"/> 18) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 19) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 20) Non-Interchange SY-EY	NOICSYEY										

Selling Parts Not in Inventory

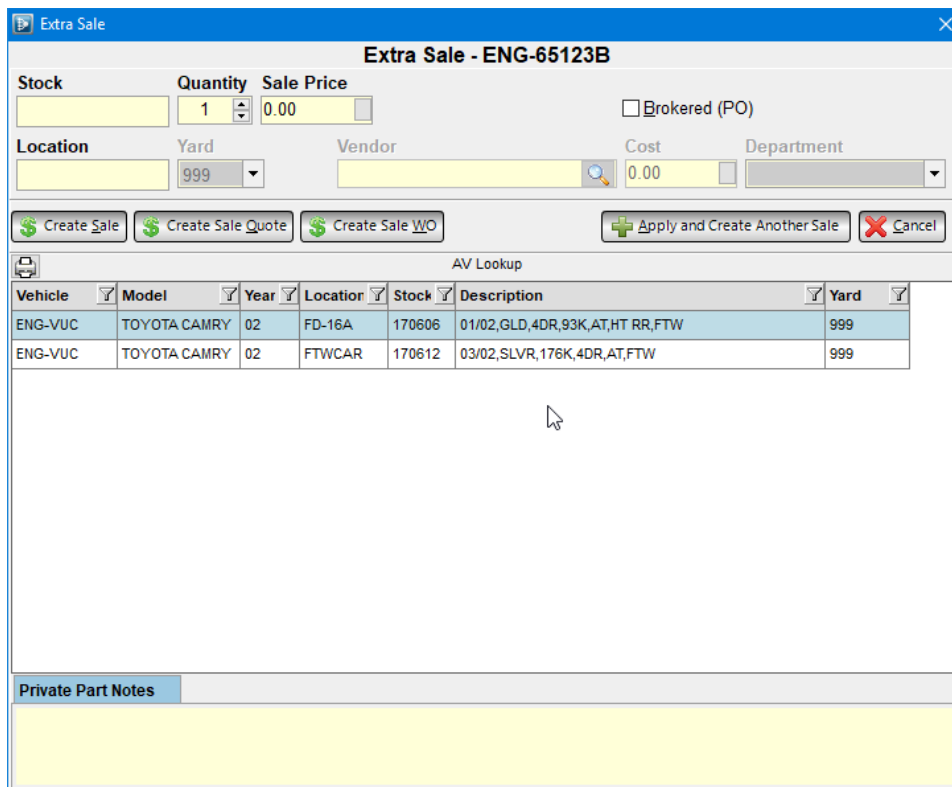
Extra Sale is the function you use to sell parts that are not in your inventory. Perhaps you have these parts in stock but they had just not yet been inventoried in Checkmate, or perhaps you are brokering a part from another recycler.

1. On the **Find** tab, enter the customer and part(s) you need to look up, and then press **Enter** or click the green **Find** button.
2. The **Interchange** tab opens. Check to select interchange numbers and then click **Search Inventory**.
3. The **Parts** tab opens, displaying available parts. To create an Extra Sale, click the **Extra\$** button to the left of the part list.



	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description	Status	Recommend	Total Retail
1 - Extra\$	2005	CAMRY		65123C		\$0.00		2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$40.00
2 - Extra\$	2005	CAMRY		61693		\$0.00		MT, (4 cylinder)			\$20.00
3	2005	CAMRY	A	61693	PULLS,MT,(4 cylinder),FTWCAR	\$342.10	171K	MT,(4 cylinder)			\$362.10
4 - Extra\$	2005	CAMRY		58927		\$0.00		RH			\$0.00
5	2004	CAMRY	C	58927	RH,NIQ,2B2,SLVR,FTWCAR	\$52.50	2cc	RH			\$52.50
6	2003	CAMRY	A	58927	RH,MAR ,3Q3,FTWCAR	\$105.00	0cc	RH			\$105.00

4. The **Extra Sale** window opens. Enter the stock number by one of these methods:
 - Enter the stock number in the Stock field.
 - Click the VUC in the AV Lookup section below to apply the sale to the correct stock number and location.
 - The **AV Lookup** section displays the VUCs for similar years and models in your yard(s). You can print this information by clicking the printer icon (🖨) button.



Extra Sale - ENG-65123B

Stock: Quantity: 1 Sale Price: 0.00 Brokered (PO)

Location: Yard: 999 Vendor: Cost: 0.00 Department:


AV Lookup

Vehicle	Model	Year	Location	Stock	Description	Yard
ENG-VUC	TOYOTA CAMRY	02	FD-16A	170606	01/02,GLD,4DR,93K,AT,HT RR,FTW	999
ENG-VUC	TOYOTA CAMRY	02	FTWCAR	170612	03/02,SLVR,176K,4DR,AT,FTW	999

Private Part Notes

5. Select the **Quantity** and enter the **Location** and **Yard** (if applicable).

6. If you are brokering the part:
 - a. Check the **Brokered (PO)** checkbox.
 - b. Use the **Vendor** field to find the Vendor. Enter the vendor name or click the magnifying glass button to add a new customer account.
 - c. Enter the **Cost** you are paying for this part. Click the blank box if you would like to use a calculator.
 - d. Enter the **Sale Price** you are selling the part for. Click the blank box if you would like to use a calculator.
 - e. Select a **Department** (if applicable).
7. Create the Extra Sale by clicking:
 - **Create Sale** to create the sale and return to the results on the **Parts tab**
 - **Create Sale Quote** to create the sale and proceed to the **Quotes tab**
 - **Create Sale WO** to create the sale and proceed to the **Work Order/Invoice tab**
 - **Apply and Create Another Sale** to create this sale and immediately begin creating another Extra Sale.
8. When you create the Extra Sale and return to the **Parts** tab, the Extra Sale is added to the bottom of the **Extra Sales** list. You can now add it to a quote or work order. Sales Pro automatically enters the vendor information on the quote or work order you create for brokered Extra Sale parts.

 **Note:** When a work order is created for a brokered Extra Sale part, a purchase order is created automatically. See the **Create Purchase Orders (Pos Tab)** section of this guide for more information about purchase orders.

Selling Parts through Car-Part Exchange

Exchange Sales in Sales Pro are for parts that you are selling through your Car-Part Exchange partners. (For more information, contact your sales rep.)

1. On the **Find** tab, enter the customer and part(s) you need to look up, and then press **Enter** or click the green **Find** button.
2. The **Interchange** tab opens. Check to select interchange numbers and then click **Search Inventory**.
3. The **Parts** tab opens, displaying available parts. To create an Exchange Sale, click the **Exchange\$** button to the left of the part list.

Part	Pick	Part	Year	Model	Grade	Stock	Description	Sale Pri	Interchange	Core Pr	DIS	Interchange Des	Recommenc	Status	Total R	Miles
1 - Extra\$	<input type="checkbox"/>	ENG	2003	TOYOTA CAMRY				\$0.00	65131		\$75.00	3.0L (V/N F, 5TH DIGIT)	Over\$		\$75.00	
2	<input type="checkbox"/>	ENG	2003	TOYOTA CAMRY	A	130824	3.0L (V/N F, 5th	\$595.62	65131		\$75.00	929	3.0L (V/N F, 5th digit)	Over\$	\$670.62	168K
3	<input type="checkbox"/>	ENG	2002	LEXUS ES300	C	141030	(3.0L, V/N F, 5th	\$595.62	65131		\$75.00	509	(3.0L, V/N F, 5th digit)	Over\$	\$670.62	0MI
4 - Extra\$	<input type="checkbox"/>	FEN-R	2003	TOYOTA CAMRY				\$0.00	58927			RH	Over\$	\$0.00		
5	<input type="checkbox"/>	FEN-R	2005	TOYOTA CAMRY	C	130614	RH,NO,3K1,BLK	\$100.00	58927			996	RH	Over\$	\$100.00	98000
6	<input type="checkbox"/>	FEN-R	2002	TOYOTA CAMRY	C	150301	RH,0T3 REPAIR	\$100.00	58927			339	RH	Over\$	\$100.00	19900
7	<input type="checkbox"/>	FEN-R	2002	TOYOTA CAMRY	A	150611	RH,PURPLE,FTV	\$100.00	58927			262	RH	Over\$	\$100.00	16800
8 - Exchange\$	<input type="checkbox"/>	ALT	2003	TOYOTA CAMRY				\$0.00	60825		\$25.00	6 CYL (100 AMP)	Push		\$25.00	

4. The **Exchange Sale** window opens. The **Stock** number, **Sale Price**, **Location**, and **Cost** are filled in automatically.

Note: If you have the vendor set up in **Advanced Purchase Orders: Assign Accounts***, you won't have to look up the vendor when creating an Exchange Sale.

Exchange Sale - ENG-72632

Stock: 15514 Sale Price: 275.00 Brokered (PO)

Location: Y Vendor: REITMAN AUTO PARTS Cost: 275.00 Department: [Dropdown]

5. Contact the seller to confirm that you can purchase this part. (When you click to highlight an Exchange Sale part, details about this seller are displayed on the **Description** tab in the search results. Use this information to contact the seller.)
6. Review the **Sale Price** and **Cost**. Edit the **Sale Price** to include any markup you wish to apply to the sale. Click the blank box if you would like to use a calculator.
7. Select a **Department** (if applicable).
8. Create the Exchange Sale by clicking one of the following:
 - **Create Exchange Sale** to create the sale and return to the results on the **Parts** tab. When you return to the **Parts** tab, the Exchange Sale is added to the bottom of the **All Parts** list. You can now add it to a quote or work order.
 - **Create Sale Quote** to create the sale and start a quote
 - **Create Sale WO** to create the sale and start a work order

Note: When a work order is created for an Exchange Sale part, a purchase order is created automatically. See the **Create Purchase Orders (Pos Tab)** section of this guide for more information.

* You can access this in Checkmate Retro (Checkmate Full: **5,12,21,2**. Checkmate Classic: **V12,21,2**)

Quoting a Part

To start a new quote, follow these steps:

1. On the **Find** tab, enter the customer and part(s) you need to look up.
2. After you enter your search criteria, press **Enter** or click the green **Find** button.

The screenshot shows the SalesPro interface with the 'Find' tab selected. The search criteria for 'AUTO BODY PRO' are entered. A summary table is visible below the search fields, showing account statistics:

	\$Balance	\$Sales	\$Credits	\$Returns	\$Avg Net	#Request	#Quotes	#Sales	#Credits	#Returns
0-30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
31-60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
61-90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Over 90	\$0.00									
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	21652	0	0
Current Year		\$12,050.0	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Prior Year		\$3.00	\$206.50	\$0.00	\$0.00	0	0	0	0	0

3. The **Interchange** tab opens with interchange options for the part(s). Check to select interchange numbers and then click **Search Inventory**.

The screenshot shows the SalesPro interface with the 'Interchange' tab selected. A list of vehicle parts and their interchange options is displayed:

Interchange Description	Interchange	QOH	Retail	Wholesale	Request	CPLocalReq	CPRegReq	CPGlobalR...	Sales	MIStock	ListPrice
ENG (2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder))											
<input checked="" type="checkbox"/> 1) California	65123C	0	\$1260.00	\$1200.15	0	194	1278	5291	0	0	\$10255.00
(Federal)											
<input type="checkbox"/> 4) 3.0L (VIN F, 5th digit, 1MZFE engine, 6 cylinder)	65131	1	\$415.78	\$395.98	0	103	679	2477	0	0	\$0.00
<input type="checkbox"/> 5) 3.3L (VIN A, 5th digit, 3MZFE engine, 6 cylinder)	65033	0	\$310.60	\$295.81	0	190	1223	4603	0	0	\$0.00
<input type="checkbox"/> 6) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 7) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 8) Non-Interchange SY-EY	NOICSY EY										
TRA (AT)											
<input type="checkbox"/> 9) 4 cylinder	62023	1	\$288.75	\$275.00	0	42	427	1553	0	0	\$0.00
(6 cylinder)											
<input type="checkbox"/> 10) 3.0L (1MZFE engine)	61598A	1	\$157.50	\$150.00	0	35	253	1231	0	0	\$4146.00
<input type="checkbox"/> 11) 3.3L (3MZFE engine)	61598C	0	\$708.75	\$675.19	0	5	57	376	0	0	\$4435.00
(MT)											
<input checked="" type="checkbox"/> 12) (4 cylinder)	61693	1	\$342.10	\$325.81	0	8	77	310	0	0	\$2570.00
<input type="checkbox"/> 13) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 14) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 15) Non-Interchange SY-EY	NOICSY EY										
FENDER (FEN)											
<input type="checkbox"/> 16) LH	58928	4	\$105.00	\$100.26	0	95	657	1917	0	0	\$344.00
<input checked="" type="checkbox"/> 17) RH	58927	1	\$105.00	\$100.26	0	86	552	1618	0	0	\$344.00
<input type="checkbox"/> 18) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 19) Non-Interchange (2005, CAMRY)	NOIC										
<input type="checkbox"/> 20) Non-Interchange SY-EY	NOICSY EY										

- The **Parts** tab opens, displaying available parts. From the search results, check the part(s) you want to sell, and then click **Start New Quote**.

The screenshot shows the SalesPro interface with the 'Parts' tab selected. The main table lists several parts, including 'ENGINE ASSEMBLY' (Part 2) and 'FENDER-R' (Parts 5 and 6). A 'Start New Quote' button is highlighted in red. Below the main table, there are sections for 'Selected Part' and 'Warranty Name'.

Part	Part Name	Year	Model	Grade	Description	Status	Interchange	Cat	Interchange Description	Review	Recommenc	Sale Price	DIS	Total
1 - Extra\$	ENG	ENGINE ASSEMBLY	2005	CAMRY			65123C		2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder	No		\$0.00	0	
2	ENG	ENGINE ASSEMBLY	2003	CAMRY	X		65123B	W	2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder	No		\$0.00	165	
3 - Extra\$	TRA	TRANSMISSION ASSY.	2005	CAMRY			62023		AT, 4 cylinder	No	NEED	\$0.00	0	
4 - Extra\$	FEN-R	FENDER-R	2005	CAMRY			58927		RH	No		\$0.00	0	
5	FEN-R	FENDER-R	2002	CAMRY	B	RH,BEIGE EXT,PAINT CODE#4Q2, PAINT DINGS, MAY P	58927	W	RH	Yes		\$105.00	313	
6	FEN-R	FENDER-R	2003	CAMRY	A	RH,MAR ,303.FTWCAR	58927	W	RH	No		\$105.00	752	

- The **Quotes** tab opens. For more information about quoting parts, see the **Quote Parts (Quotes Tab)** section of this guide.

Selling Parts from a Quote

To sell parts from a quote, follow these steps:

1. From the **Quotes** tab, use the **Sell** column to check which parts you want to sell.* By default, all parts are checked.
2. Click **Promote All to WO** (if all parts are checked) or **Promote Selected to WO** (if only some parts are checked). The parts are promoted to a work order.

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Wd			
				FRANK	09/13/2019	09/1			
	<input type="checkbox"/> Sell	Part	Year	Model	Description	Total Price	Sale Price	Tax	Total R
1 - Remove	<input checked="" type="checkbox"/>	EN-LH	2010	CAMRY	LH	\$100.00	\$100.00	Yes	
2 - Remove	<input type="checkbox"/>	LT	2010	ALTIMA	2.5L (4 cyl), w/o hybrid,Pull ...	\$83.00	\$55.00	Yes	
3 - Remove	<input checked="" type="checkbox"/>	LP-LH	2010	CAMRY	LH_OR LHBBase, , North Ameri...	\$100.00	\$100.00	Yes	
EPA - Remove		PA				\$3.00	\$3.00	No	

Parts	\$258.00	Selected Part	JOHN CUSTOMER					
Warranty	\$10.00	Tax Authority	Quote	Date	Customer	SLS	Price	Grade
Cores	\$18.00		48173	09/13/19	JOHN	F	\$100.00	B
Freight	\$0.00	Tax Freight	48173	09/13/19	JOHN	F	\$65.00	A
Est. Tax	\$19.81	Yes	48173	09/13/19	JOHN	F	\$100.00	C
Total	\$305.81		48172	09/13/19	1	F	\$180.00	X
Payment	Cash		48050	09/04/19	JANE	F	\$0.00	X
			48050	09/04/19	JANE	F	\$100.00	

Note: If not all of the parts on a promoted to a work order, the quote's **Status** remains **Active**, allowing you to sell the remaining parts off the quote at a later time. The quote status remains **Active** until all parts on the quote are sold, the quote expires, or the unsold parts are removed from the quote

* If a part is no longer available to sell (the status is **W**, **I**, **S**, or **D**), there will be no **Sell** checkbox.

If the unavailable part is on a work order or invoice, the work order number displays in blue in the **Sell** column. Double-click the number to view the work order/invoice.

If both a checkbox and a work order number display, this is an extra sale part that was previously promoted to a work order.

- The **Work Order/Invoice** tab opens, displaying the work order. Edit the work order, then click **Save**. For more information about editing a work order, see the **Create Work Orders or Invoices (Work Order/Invoice Tab)** section of this guide.

The screenshot displays the 'SalesPro' application window. At the top, it shows the customer name 'JOHN CUSTOMER' and a credit limit of '\$2000'. The 'Work Order / Invoice' tab is active. The interface is divided into several sections:

- Customer Information:** Fields for 'Customer Bill To' and 'Customer Ship To', both set to 'JOHN CUSTOMER'. It includes contact details like '123 FIXERUP RD.' and 'ANYTOWN, KY 41017'.
- Work Order Details:** Shows 'Work Order 999-501789' dated '09/19/2019'. There are input fields for 'Enter Work Order #' and 'Enter Invoice #', and a checkbox for 'Add Part, Ex. TRA'.
- Order Summary Table:** A table with columns: Order Date, Ship Date, Due Date, Ordering, Customer PO, Dismantler, Core, R/O #, Truck, Sales Person, Discount %, Tax %. It lists three items: '1 - Remove' (FEN-LH CAMRY), '2 - Remove' (HLP-LH CAMRY), and 'EPA - Remove' (EPA).
- Summary and Payments:** A section on the left shows 'Parts' (\$203.00), 'Warranty' (\$0.00), 'Cores' (\$0.00), 'Freight' (\$0.00), and 'Tax' (\$14.00), totaling \$217.00. A 'Payments' table shows one entry for 'Cash' for \$217.00.
- Selected Part Table:** A table with columns: WO, Date, Customer, SLS, Price, Grade. It lists three work orders: 501789 (JOHN, FRANK, \$100.00, B), 501727 (JANE, FRANK, \$100.00), and 501726 (JANE, FRANK, \$100.00, X).
- Bottom Buttons:** A row of buttons including 'Save and Print Work Order', 'Print/Promote to Invoice', 'Print Label', 'Work Order History', 'Save', and 'Close'.

- From here, you can:

- Click the **Save and Print Work Order** button to save and print. Click the arrow to **Print Work Order**, **Email Work Order**, or **View Work Order**.
- Click the **Print/Promote to Invoice** button to create and print the invoice. Click the arrow to **Post Invoice**, **Promote to Invoice**, **Print Invoice and Email**, **Email Invoice**, **View Invoice**, or **Print WO or Invoice**.
- Click the **Print Label** button to print a shipping label for the part you highlight, or click the arrow to print shipping labels for all parts on the work order.
- Click the **Work Order History** button to view the edit and print history for the work order on the **Work Order History** window.

Note: For more information about the **Work Order/Invoice** tab, see the **Create Work Orders or Invoices (Work Order/Invoice Tab)** section of this guide.

Crediting and Returning Parts

To credit or return a part:

1. Use the **Research** section of the **Find** tab to look up the invoice.
2. The **Work Order/Invoice** tab opens with the invoice. Click the **Credit/Return** button at the bottom of the invoice.

The screenshot shows the SalesPro interface for a 'WALK IN NON TAX' invoice. The 'Work Order/Invoice' tab is active. At the bottom of the interface, the 'Credit/Return' button is highlighted in yellow, with a red arrow pointing to it. Other buttons include 'Print Invoice', 'Print Label', 'Work Order History', and 'Close'.

Order Date	Ship Date	Due Date	Ordering	Customer PO	Dismantler	Core	R/O #	Truck	Sales Person	Discount %	Tax %
09/13/2019	09/10/2019	09/10/2019			OUTRIGHT				ALEX		7

Year	Part	Model	Description	Total Price	Sale Price	Discounted	Tax	Total Retail	Total Whole	Warranty Description	Stock	Location	Interchange	Department	Interchang	Cost	Cat
2001	ENG	GOLF	GOLF (Extra Sale) 01 Int.763	\$500.00	\$400.00	Yes	No	\$100.00	\$100.00				76318C	USED PART S		\$0.00	
2001	CORE-DUE	GOLF	ENGINE ASSEMBLY	\$75.00	\$75.00	No	No	\$0.00	\$0.00					CORES		\$0.00	

Part	Amount
Parts	\$500.00
Warranty	\$0.00
Cores	\$75.00
Freight	\$0.00
Tax	\$0.00
Total	\$575.00
Remaining	\$0.00
Amt Paid	\$575.00
Deposited	\$0.00

WO	Date	Customer	SLS	Price	Grade
501678	08/23/19	Walk-In	ALEX	\$300.00	
501642	08/14/19	Walk-In	ALEX	\$100.00	
501574	07/25/19	walkin	ALEX	\$400.00	X
501561	07/24/19	walkin	ALEX	\$400.00	X

3. The **Credits>Returns** tab opens. Click the **Return** button next to each part you would like to credit or return, or use the **Return Part** drop-down. (Click the magenta **Select ALL for Return** button to select all parts on the invoice.)
4. The **Reason for change** window opens. Click to select a reason for the credit or return, then click **Accept**.

The 'Reason for change' dialog box is shown with the title 'Choose A Reason'. The following options are listed:

- 1 Part Return
- 2 Discount on Sale
- 3 Wrong Part
- 4 Discount Coupon
- 5 Warranty Return

At the bottom of the dialog, there are 'Accept' and 'Cancel' buttons.

5. Locate the **Restock** column. (You may need to scroll horizontally to find it.)

2010, TOYOTA MATRIX WALK IN TAXABLE CREDIT LIMIT : \$0 AVAILABLE \$4744.75

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Information

Order by: WALK IN TAXABLE


Address 1, Address 2, Address 3, Email Address, IM Address, Phone


Work Order: 999-111951
Invoice: 178 **POSTED**

Enter Invoice #

Order Date	Ordered By	Ordered By	Customer PO	R/O #	Truck	Sales Person
05/11/2016						KELLY

Returned	Part	Year	Model	Description	Total Price	Sale Price	Remaining to Credit	Credit Amount	Total Credit	Tax	Return Part	Restock	Return
Returned	ENG	2009	COROLL	(INV 178-1) COROLL 09 Int...	\$795.67	\$795.67	\$0.00	\$795.67	\$795.67	Yes	Yes	Now	N
Return	CORE-I	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	N
Return	ENG	2009	COROLL	COROLL 09 Int.65038 1.8L (...)	\$795.67	\$795.67	\$795.67	\$0.00	\$0.00	Yes	No	No	N
Return	CORE-I	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	N
Return	ENG	2009	COROLL	COROLL 09 Int.65038 1.8,IM...	\$795.67	\$795.67	\$795.67	\$0.00	\$0.00	Yes	No	No	N
Return	CORE-I	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	N

6. Using the drop-down in this column, choose whether to restock the part **Now**, or **Later**. If you do not wish to restock the part, select **No**.
 - If you select **Later**, the part will be moved to the restock file. You can restock the part using the **Restocking** function*.
7. Repeat steps 3-6 for any more parts you wish to return and restock.
8. Click one of the following buttons at the bottom of the screen. Each performs an action *and* will *also* direct you to the Checkmate Inventory tool to restock the part(s).
 - **Print Credit Work Order**
 - Click this button, or click the arrow for more options.
 - **Print Credit Invoice print**
 - Click this button, or click the arrow for more options.
9. The Checkmate Inventory tool opens with the part(s) you're returning displayed to restock. For each part being restocked:
 - a. Click inside the **Location** field
 - b. Type the new location.
10. Click the save button. 

 **Note:** When a part is credited or returned, a part note is added to the invoice.

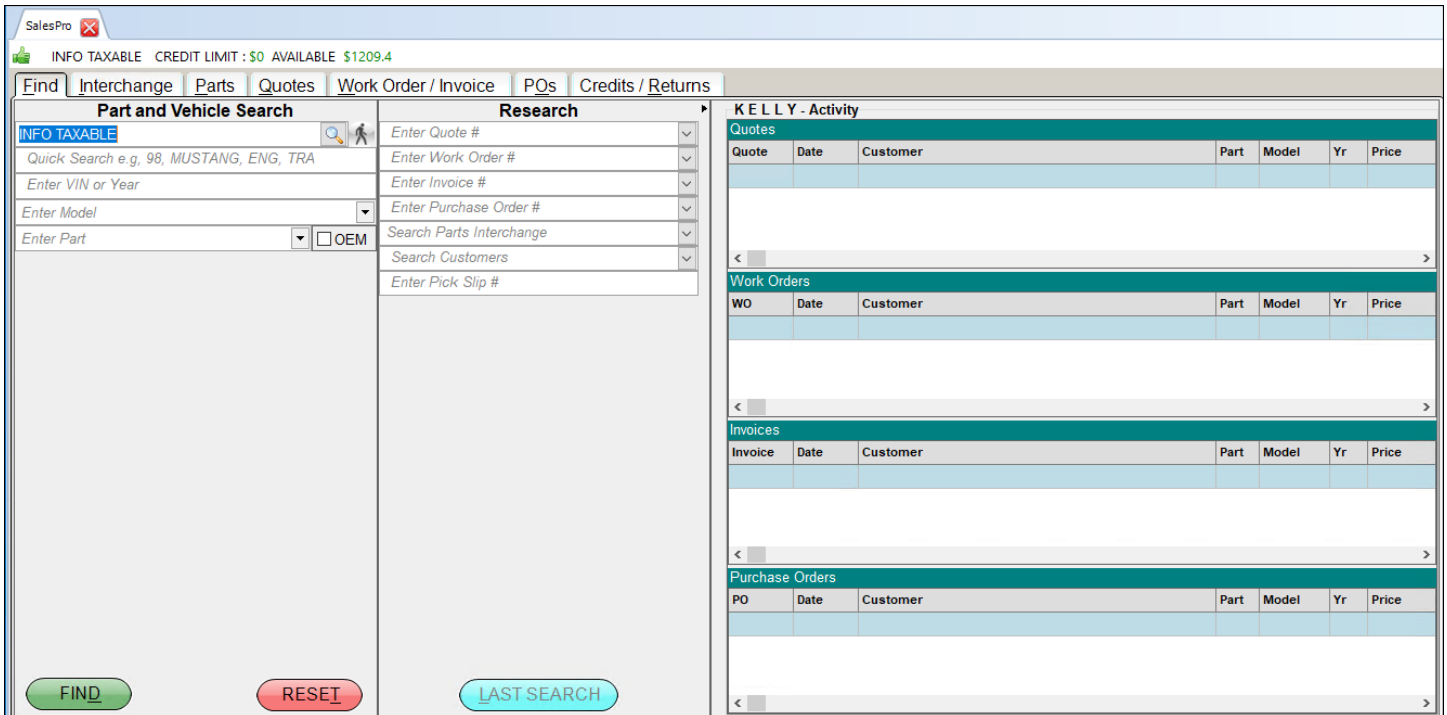
* Access this function in Checkmate Retro: (Checkmate Full: **5,12,19**. Checkmate Classic: **V12,19**)

Open Sales Pro

From Checkmate Workstation, click the cash register icon button in the top menu to open Sales Pro.



The **Sales Pro** tab opens.



Note: You can configure Sales Pro to automatically open when you start Checkmate Workstation. Go to **Settings>Workstation** and select the **Tab Startup** tab to specify which tabs you want to open automatically.

Find Customer and Parts (Find Tab)

Checkmate Sales Pro's **Find** tab is the first tab you see when you open Sales Pro. It includes:

- **Part and Vehicle Search** – find parts, vehicles, or customers
- **Research** – find information about an existing quote, pick slip, work order, purchase order, or eBay item (learn more in the **Research** section of this guide)
- **Activity** – view quotes, works orders, invoices, and purchase orders created in the last 10 days by the user logged in to Checkmate Workstation (when a customer is selected, this section will show customer activity instead). You can customize the information that displays by:
 - Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.
 - Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).

The screenshot shows the SalesPro Find tab interface. At the top, it displays the customer name 'WALK IN TAXABLE' and their credit limit and available balance. The interface is divided into several sections:

- Part and Vehicle Search:** Includes a search bar with 'WALK IN TAXABLE' entered, and fields for 'Quick Search e.g., 98, MUSTANG, ENG, TRA', 'Enter VIN or Year', 'Enter Model', and 'Enter Part'. There is also an 'OEM' checkbox.
- Research:** Includes dropdown menus for 'Enter Quote #', 'Enter Work Order #', 'Enter Invoice #', 'Enter Purchase Order #', 'Search Parts Stock #', 'Search Customers', and 'Enter Pick Slip #'. There are also 'FIND', 'RESEI', and 'LAST SEARCH' buttons at the bottom.
- KELLY - Activity:** This section contains three tables:
 - Quotes:**

Quote	Date	Customer	Part	Model	Yr	Price	Yar
45140	07/19/18	WALK IN NON TAX	ALT	CAMRY	08	\$100.92	
45139	07/10/18	WALK IN TAXABLE	ENG	CAMRY	11	\$1,499.74	
45138	07/10/18	WALK IN TAXABLE	TRA	CAMRY	09	\$325.85	
 - Work Orders:**

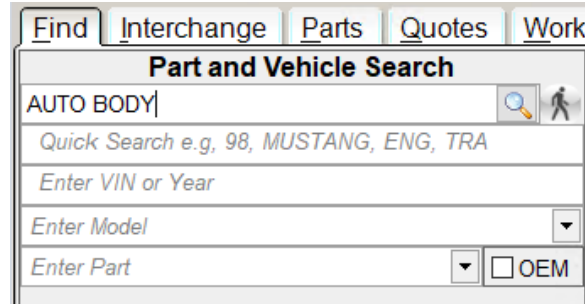
WO	Date	Customer	Part	Part #	Model	Yr	Price
124807	08/10/18	WALK IN NON TAX	CORE		CAMRY	10	
124807	08/10/18	WALK IN NON TAX	TRA	400	CAMRY	10	
124796	08/07/18	AWESOME ABE'S AUTOMOTIVE	FEN	110	CAMRY	00	
 - Invoices:** (Table with columns: Invoice, Date, Customer, Part, Model, Yr, Price, Yar)
 - Purchase Orders:** (Table with columns: PO, Date, Customer, Part, Model, Yr, Price, Yar)

Note: The **Activity** section shows a user's activity for the last 10 days. This time period cannot be changed.

Find Customer

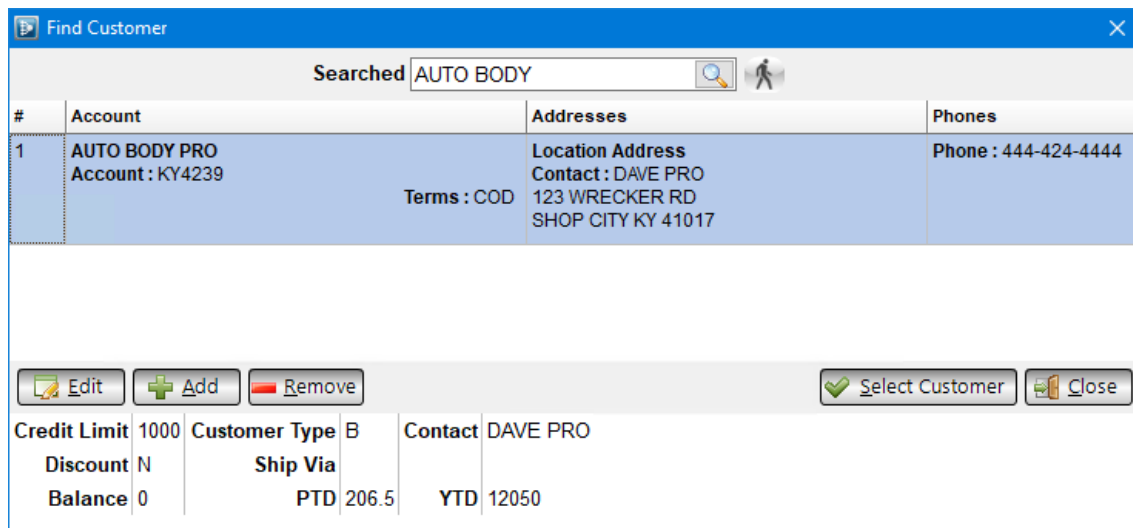
On the **Find** tab, locate the **Part and Vehicle Search** section. This is where you search for customers, vehicles, or parts. With the customer search, you can find customer details. To find a customer, follow these steps:

1. In the **Enter customer information to search** field, enter the customer name (or part of the name). Press **Enter** or click the magnifying glass search button.



The screenshot shows a software interface with a tabbed menu at the top containing 'Find', 'Interchange', 'Parts', 'Quotes', and 'Work'. The 'Find' tab is active, displaying a 'Part and Vehicle Search' section. This section includes a search input field with 'AUTO BODY' entered, a magnifying glass icon, and a 'Walk-In' icon. Below the search field are three additional input fields: 'Quick Search e.g, 98, MUSTANG, ENG, TRA', 'Enter VIN or Year', and 'Enter Model'. At the bottom of the search section is an 'Enter Part' field with a dropdown arrow and an 'OEM' checkbox.

2. In the **Find Customer** window, click to select the appropriate customer.



The screenshot shows a 'Find Customer' window with a search bar at the top containing 'AUTO BODY'. Below the search bar is a table with the following data:




#	Account	Addresses	Phones
1	AUTO BODY PRO Account : KY4239 Terms : COD	Location Address Contact : DAVE PRO 123 WRECKER RD SHOP CITY KY 41017	Phone : 444-424-4444

Below the table are several buttons: 'Edit', 'Add', 'Remove', 'Select Customer', and 'Close'. At the bottom of the window, there is a summary section with the following details:

Credit Limit	1000	Customer Type	B	Contact	DAVE PRO
Discount	N	Ship Via			
Balance	0	PTD	206.5	YTD	12050

With the customer selected, click:

- **Select Customer** to open the customer's sales information on the **Find** tab
- **Edit** to edit customer information
- **Remove** to remove this customer from the system (the customer must have a zero balance)

 **Note:** You can perform a new search by entering a name in the **Searched** field at the top of the window and clicking the magnifying glass () button. You can also click the **Walk-In** () button to perform a part search for a walk-in customer.

- The customer information now displays underneath the **Part and Vehicle Search**. The **Activity** section now displays customer activity (replacing the salesperson recent activity).

The customer sales information in the **Part and Vehicle Search** section gives salespeople a quick overview of the customer's credit and recent activity.

Part and Vehicle Search

AUTO BODY PRO

Quick Search e.g, 98, MUSTANG, ENG, TRA

Enter VIN or Year

Enter Model

Enter Part OEM

Research

Enter Quote #

Enter Work Order #

Enter Invoice #

Enter Purchase Order #

Search Parts Interchange

Search Customers

Enter Pick Slip #

FIND RESEI LAST SEARCH

Credit Limit : \$1000 Available \$1000

	\$Balance	\$Sales	\$Credits	\$Returns	\$Avg Net	#Request	#Quotes	#Sales	#Credits	#Returns
0-30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
31-60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
61-90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Over 90	\$0.00									
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0	21652	0	0
Current Year		\$12,050.0	\$0.00	\$0.00	\$0.00	0	0	0	0	0
Prior Year		\$3.00	\$206.50	\$0.00	\$0.00	0	0	0	0	0

This section will display one of the following icons:

- Green thumb indicates that the customer is in good standing.
- Yellow hand recommends proceeding with caution. This customer has unpaid purchases 30-60 days old.
- Red thumb recommends that this customer not be sold to until the account is returned to good standing. This customer has unpaid purchases more than 60 days old.

Note: If you search for a customer and then perform a part search, the customer information will “follow” you through the sales process. For example, if you find a part and begin to create a quote or a work order, the customer information will automatically be included in the quote/work order. The top of the screen displays the name of the customer currently selected.

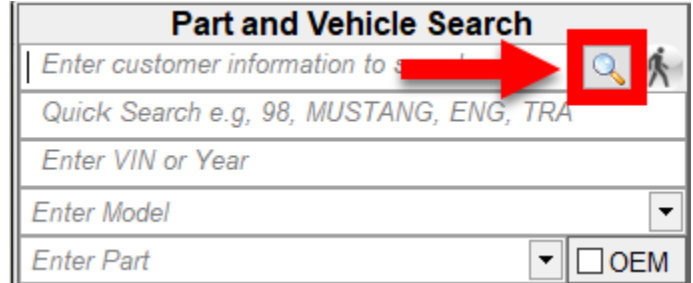
SalesPro

AUTO BODY PRO 444-424-4444 DAVE PRO CREDIT LIMIT : \$1000 AVAILABLE \$1000

Add Customer

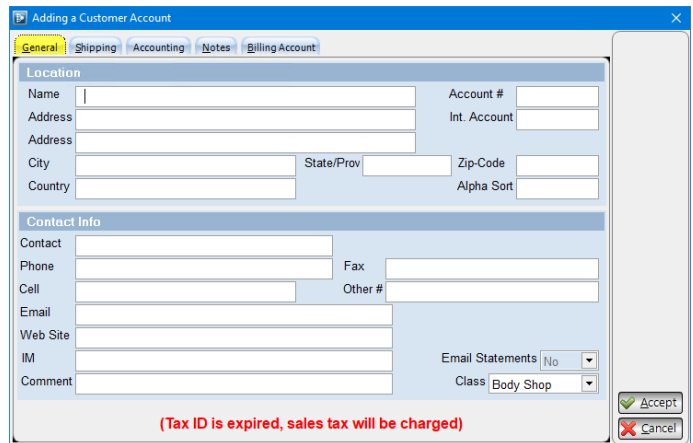
To add a new customer to Checkmate, follow these steps:

1. With the **Enter customer information to search** field blank, click the magnifying glass search button.




The screenshot shows the 'Part and Vehicle Search' window. At the top, there is a search bar with the text 'Enter customer information to search'. A red arrow points to a magnifying glass icon on the right side of the search bar. Below the search bar, there are several input fields: 'Quick Search e.g., 98, MUSTANG, ENG, TRA', 'Enter VIN or Year', 'Enter Model', and 'Enter Part'. There is also a dropdown menu for 'OEM'.

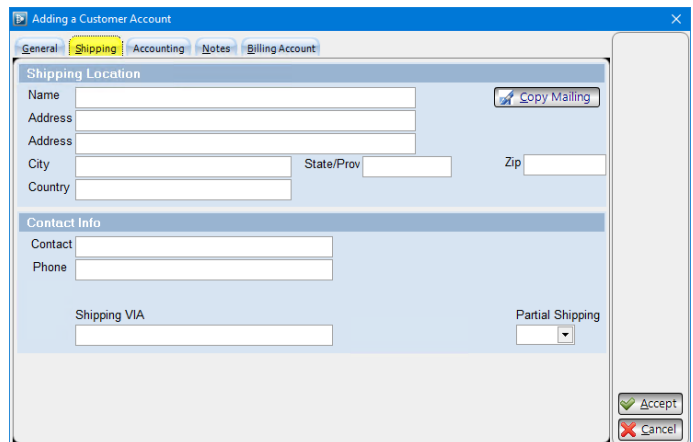
2. The **Adding a Customer Account** window opens. On the **General** tab, enter the customer's contact information.
 - **Account #** – Checkmate account number.
 - **Int. Account** – Internal account number.
 - **Alpha Sort** – Enter the customer's name *without* punctuation or spaces, up to 6 spaces (e.g., **A.B.C. Yard** would be entered as **ABCYar**). This makes the customer search processes more accurate. *This is not a required field.*



The screenshot shows the 'Adding a Customer Account' window with the 'General' tab selected. The 'Location' section includes fields for Name, Address, City, State/Prov, Zip-Code, Country, Account #, Int. Account, and Alpha Sort. The 'Contact Info' section includes fields for Contact, Phone, Cell, Fax, Other #, Email, Web Site, IM, and Comment. There are also dropdown menus for 'Email Statements' (set to 'No') and 'Class' (set to 'Body Shop'). A red message at the bottom states '(Tax ID is expired, sales tax will be charged)'. There are 'Accept' and 'Cancel' buttons at the bottom right.

Note: If you only see a **Quick Entry** tab and **Account Defaults** tab, this means that you have abbreviated customer entries enabled.* In this case, you can display the other tabs on this window by clicking the padlock button. 

3. On the **Shipping** tab, enter the customer's shipping information, or click the **Copy Mailing** button to copy the address information from the **General** tab.
 - **Shipping VIA** identifies the customer's preferred method of shipment (USPS, UPS, etc.)
 - **Partial Shipping** identifies whether a customer accepts partial shipments (e.g., if 3 out of 5 parts are ready to ship, answering **Yes** here means that this customer accepts partial shipments instead of requiring that the entire order be complete).



The screenshot shows the 'Adding a Customer Account' window with the 'Shipping' tab selected. The 'Shipping Location' section includes fields for Name, Address, City, State/Prov, Zip, and Country, along with a 'Copy Mailing' button. The 'Contact Info' section includes fields for Contact and Phone. There is a 'Shipping VIA' dropdown menu set to 'Partial Shipping'. There are 'Accept' and 'Cancel' buttons at the bottom right.

* You can disable this in Checkmate Retro: go to the **Change Accounts Receivable** function (Checkmate Full: **6,10,5**. Checkmate Classic: **S3,5**), and enter **N** at the **Enable Abbreviated Entry** prompt.

4. On the **Accounting** tab, enter accounting information for the customer. Some fields are filled in automatically using your system's **Account Defaults**.

- You can change the **Account Defaults** in the **Account Defaults** tab, located in the **Yard Settings** window.

5. On the **Notes** tab, enter any notes that you would like to associate with this account.

- If you add a note to an account, a note icon button (NOTE) appears after you select this customer on the **Find** tab. Click this button to view any notes associated with the account.
- Toggle the order that existing notes are displayed in, by clicking **Note Order**.

6. On the **Billing Account** tab, enter in, or search for a customer to be linked as the billing account for this new account.

- If you link a billing account to a new customer account (or a current account), you can send the part to the shipping account address, and send the bill to the billing account address.

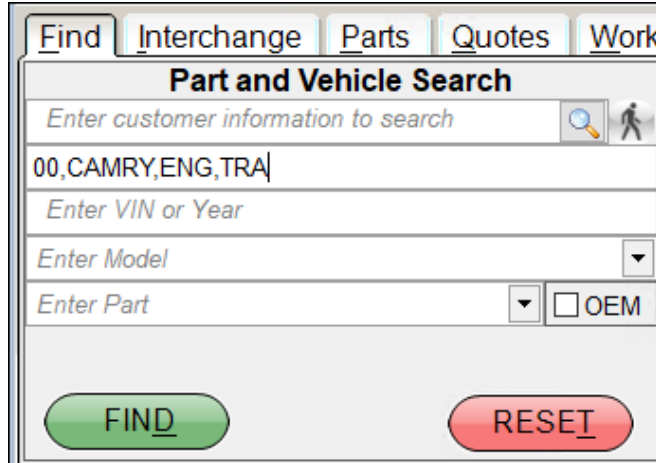
7. Click **Accept** to add this customer to your system.

Find Parts

There are several ways to begin a part search in the **Part and Vehicle Search** section:

Quick Search

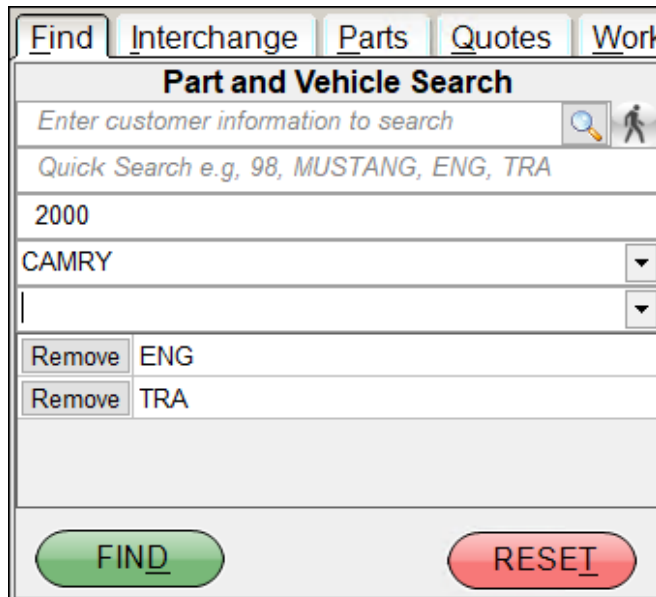
1. In the **Quick Search** field, enter the year, model, and part code(s), separated by commas.
2. Press **Enter** or click the green **Find** button.
3. The **Interchange** tab opens with interchange options for these parts.



The screenshot shows the 'Part and Vehicle Search' interface. At the top, there are tabs for 'Find', 'Interchange', 'Parts', 'Quotes', and 'Work'. The 'Find' tab is selected. Below the tabs, the title 'Part and Vehicle Search' is displayed. There are four input fields: 'Enter customer information to search' (with a magnifying glass icon), '00,CAMRY,ENG,TRA' (with a person icon), 'Enter VIN or Year', and 'Enter Model' (with a dropdown arrow). Below these fields is an 'Enter Part' field with a dropdown arrow and an 'OEM' checkbox. At the bottom, there are two buttons: a green 'FIND' button and a red 'RESET' button.

Search by Year/Model/Part

1. Enter Year, Model, and Part(s) in the appropriate fields.
2. After entering a part, press **Enter** to have the ability to add additional parts.
3. Press **Enter** or click the green **Find** button.
4. The **Interchange** tab opens with interchange options for these parts.



The screenshot shows the 'Part and Vehicle Search' interface. At the top, there are tabs for 'Find', 'Interchange', 'Parts', 'Quotes', and 'Work'. The 'Find' tab is selected. Below the tabs, the title 'Part and Vehicle Search' is displayed. There are four input fields: 'Enter customer information to search' (with a magnifying glass icon), 'Quick Search e.g, 98, MUSTANG, ENG, TRA' (with a person icon), '2000', and 'CAMRY' (with a dropdown arrow). Below these fields is a list of parts: 'Remove ENG' and 'Remove TRA'. At the bottom, there are two buttons: a green 'FIND' button and a red 'RESET' button.

Search by VIN (recommended)

Searching by the VIN will use Car-Part.com's exclusive technology, SmartVin, to give you the most accurate search results. SmartVin decodes the VIN and determines many of the correct interchange numbers for you automatically.

1. Enter the VIN in the **Enter VIN or Year** field. Press **Enter**. The year and model information will populate automatically.

2. Click the magnifying glass search button to the right of the VIN if you would like to View, **Email**, or **Print** the VIN decode information.

VIN: 4T1BE32K15U419044

4T1BE32K15U419044			
Year	2005	Tilt Wheel	Standard
Make	TOYOTA	Roof	None/not available
Series	CAMRY LE/XLE/SE	Roof Option 1	Power sun/moon roof
Body	Sedan 4 Dr.	Radio	AM/FM/Cassette
Class	Passenger	Radio Option 1	AM/FM/CD
Engine	4 cyl	ABS Brakes	4 wheel standard
CID	144	List Price	19145
Liters	2.4	Tire Size	15R205
Fuel	Gas	Wheel Base	107.1 inches
Carburetion	Fuel Injection	Security	???
Actual TRA	Unknown	Running Lights	Standard
Optional Trans #1	5 speed automatic w/overdrive	Weight	3108
Restraint	Dual front air bags/active belts	Segmentation	Non Luxury Mid Size
Drive Wheels	FWD	Country Of Origin	UNITED STATES
AC	Standard	Engine Description	L4 FI DOHC 16V
Power Steering	Standard	Aspiration	Normal
Power Brakes	Standard	Carburetion Information	Fuel injection (non-specific)
Power Windows	Standard	Base Model	CAMRY

Email
 Print
 Close

3. Enter the part(s) in the **Enter Part** field. (Press **Enter** to have the ability to add additional parts in this field.)

The screenshot shows a web interface for searching parts. At the top, there are navigation tabs: 'Find', 'Interchange', 'Parts', 'Quotes', and 'Work'. Below these is the title 'Part and Vehicle Search'. The form includes a search bar with a magnifying glass icon and a person icon, containing the text 'Enter customer information to search'. Below this is a 'Quick Search' prompt with examples: 'Quick Search e.g., 98, MUSTANG, ENG, TRA'. There are two input fields: one with '2005' and another with '4T1BE32K15U419044'. Below these are two dropdown menus, the first containing 'CAMRY'. A 'Remove ALT' button is located below the dropdowns. At the bottom of the form are two large buttons: a green 'FIND' button and a red 'RESET' button.

4. Click the green **Find** button.
5. The **Interchange** tab opens with interchange options for these parts.

Note: When you use your customer's VIN to look up parts, the VIN is included on printed quotes and invoices.

Search by OEM Number

1. With no other year/model/part information entered, check the **OEM** checkbox and enter the OEM number in the **Enter OEM #** field.
2. Press **Enter** or click the green **Find** button.

The screenshot shows the same 'Part and Vehicle Search' form. The 'Find' tab is selected. The search bar contains 'INFO TAXABLE'. The 'Quick Search' prompt is visible. Below it is a field for 'Enter VIN or Year'. The 'Enter Model' dropdown is empty. The 'Enter OEM #' field contains '5380133120' and has a dropdown arrow. The 'OEM' checkbox is checked. At the bottom of the form is a green 'FIND' button.

3. The **Interchange** tab opens with interchange options for this part.

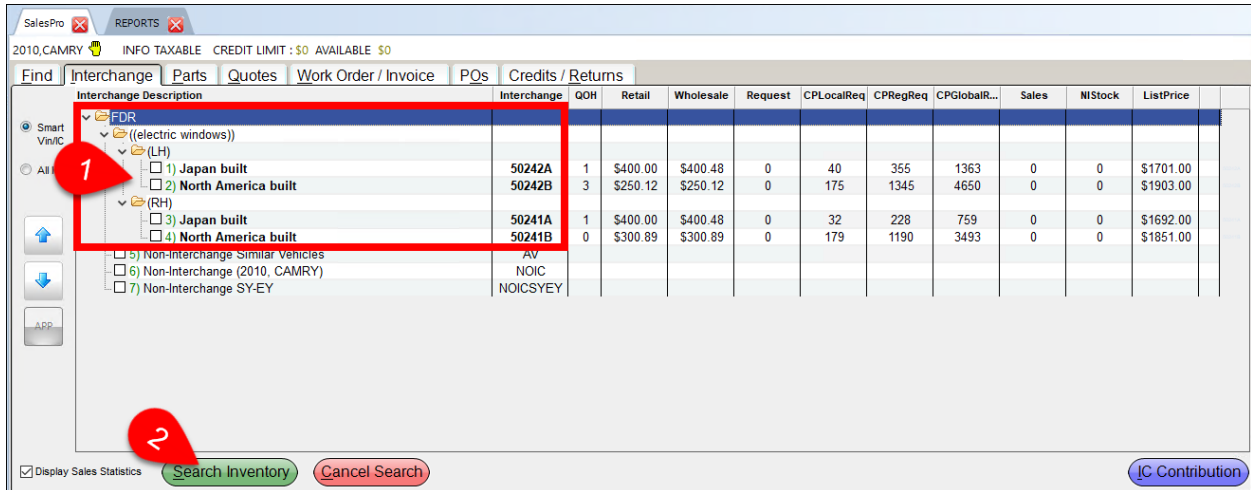
Interchange Selection (Interchange Tab)

The second stage of finding a part is the **Interchange** tab. This tab displays the available interchange choices for the part(s) you are searching for as well as options to perform a non-interchange search. You can select both interchange and non-interchange search options in the same search.

Interchange Search

To search for parts by interchange number:

1. Check the checkbox(es) for the interchange number(s) you want to search for. Interchange numbers are listed in the **Interchange** column.
2. Click **Search Inventory**.

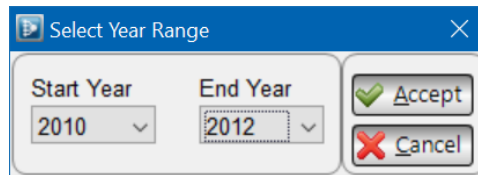


The **Parts** tab opens, displaying available parts.

Non-Interchange Search

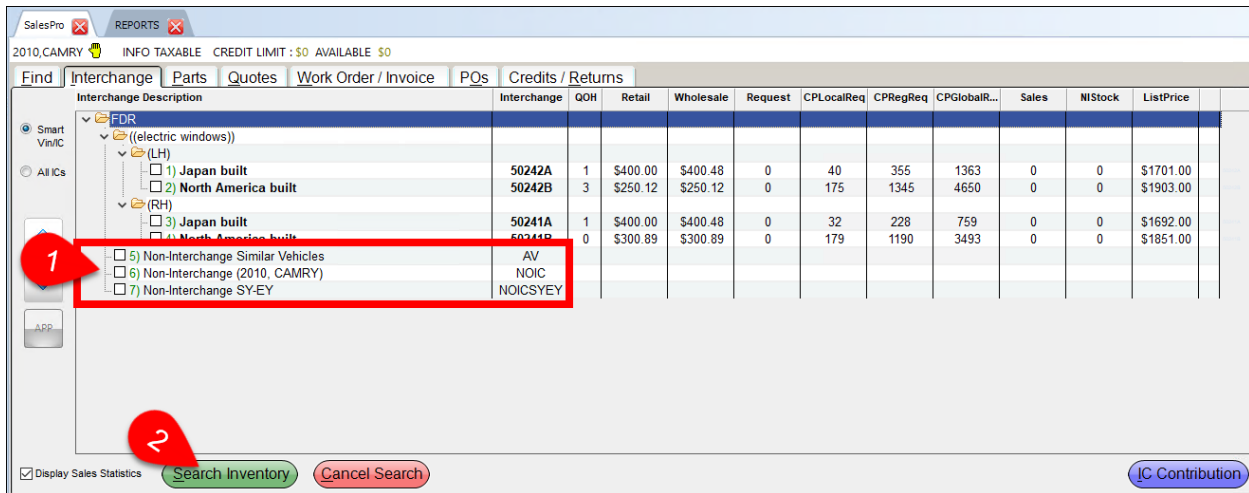
To search for parts without the help of interchange:

1. Click the checkbox(es) for the non-interchange search option(s) you want to use to search. Several options are available:
 - **Non-Interchange Similar Vehicles (AV)** – Check this box to perform an Alternative Vehicles (AV) search. This searches your inventory for alternative vehicles that may have the part.
 - **Non-Interchange (NOIC)** – Check this box to perform a search using just the part code, year, and model, without the help of interchange.
 - **Non-Interchange SY-EY (NOICSYEY)** – Check this box to search by part code, model, and a range of years. The **Select Year Range** window appears. Use the **Start Year** and **End Year** fields to set the range of years to search for, then click **Accept**.



The dialog box titled "Select Year Range" has a close button (X) in the top right corner. It contains two dropdown menus: "Start Year" with "2010" selected and "End Year" with "2012" selected. Below the dropdowns are two buttons: "Accept" with a green checkmark icon and "Cancel" with a red X icon.

2. When you've selected your search option(s), click **Search Inventory**.



The screenshot shows the SalesPro interface with the "Parts" tab selected. The "Interchange" section is expanded, showing a tree view of parts. A red box highlights the search options: "5) Non-Interchange Similar Vehicles (AV)", "6) Non-Interchange (2010, CAMRY) (NOIC)", and "7) Non-Interchange SY-EY (NOICSYEY)". A red circle with the number "1" is next to the search options, and another red circle with the number "2" is next to the "Search Inventory" button at the bottom of the interface.

Interchange Description	Interchange	QOH	Retail	Wholesale	Request	CPLocalReq	CPRegReq	CPGlobalR...	Sales	NIStock	ListPrice
1) Japan built	50242A	1	\$400.00	\$400.48	0	40	355	1363	0	0	\$1701.00
2) North America built	50242B	3	\$250.12	\$250.12	0	175	1345	4650	0	0	\$1903.00
3) Japan built	50241A	1	\$400.00	\$400.48	0	32	228	759	0	0	\$1692.00
4) North America built	50241B	0	\$300.89	\$300.89	0	179	1190	3493	0	0	\$1851.00

The **Parts** tab opens, displaying available parts.

Customize Display

Manage your display by:

- A. Selecting the interchange choices you would like to see:
 - **SmartVin/IC** displays choices narrowed by SmartVin and Smart Interchange*.
 - **All Ics** displays all interchange choices for this year/make/model.
- B. Using the arrowheads (v) to expand/collapse one section at a time, or the blue arrow buttons (Expand All, Collapse All) to expand/collapse everything on the screen.
- C. Checking the **Display Sales Statistics** checkbox to see sales history, pricing information, and Car-Part.com request data†.
 - Car-Part.com request data is only available to Advanced Bidmate subscribers. Contact your sales rep to learn more.
- D. Resizing the columns with your mouse. The right-most column is **ListPrice**. Resize your columns to ensure you are seeing all of the information.

Interchange Description	Interchange	QOH	Retail	Wholesale	Request	CPLocalReq	CPRegReq	CPGlobalR...	Sales	MIStock	ListPrice
Smart Vin/IC (2.4L (VIN E, 5th digit, 2AZFE engine, 4 cyl))											
<input type="checkbox"/> 1) Calif	65123C	2	\$1200.00	\$1200.15	4	133	1230	5441	0	4	\$10255.00
<input type="checkbox"/> 2) Fed	65123B	2			0	748	4845	14036	0	0	\$13980.00
All Ics (3.0L (VIN F, 5th digit, 1MZFE engine, 6 cyl))											
<input type="checkbox"/> 3) from 1/03	65131	1	\$595.62	\$595.62	1	144	984	2968	0	0	\$0.00
<input type="checkbox"/> 4) thru 12/02	65530M	0	\$425.63	\$425.63	0	160	861	2635	0	0	\$12357.00
<input type="checkbox"/> 5) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 6) Non-Interchange (2003, CAMRY)	NOIC										
<input type="checkbox"/> 7) Non-Interchange SY-EY	NOICSY-EY										
FENDER (FEN)											
<input type="checkbox"/> 8) LH	58928	0	\$100.00	\$100.26	1	93	1161	2605	0	0	\$301.00
<input type="checkbox"/> 9) RH	58927	1	\$100.00	\$100.26	4	115	1109	2396	0	0	\$0.00
<input type="checkbox"/> 10) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 11) Non-Interchange (2003, CAMRY)	NOIC										
<input type="checkbox"/> 12) Non-Interchange SY-EY	NOICSY-EY										
ALT											
<input type="checkbox"/> 13) 4 cyl (80 amp)	60824	1	\$35.30	\$35.30	0	7	77	254	0	0	\$0.00
<input type="checkbox"/> 14) 6 cyl (100 amp)	60825	0	\$55.00	\$55.38	0	7	54	206	0	0	\$397.00
<input type="checkbox"/> 15) Non-Interchange Similar Vehicles	AV										
<input type="checkbox"/> 16) Non-Interchange (2003, CAMRY)	NOIC										
<input type="checkbox"/> 17) Non-Interchange SY-EY	NOICSY-EY										

*SmartVin is a Car-Part.com-exclusive technology that realizes the interchange number for many parts directly from the VIN, so that inventorying or searching for parts is simplified. SmartVin is only applicable when you search with a VIN.

Smart Interchange is a Car-Part.com-exclusive technology that learns about a vehicle as you work. Interchange choices are eliminated as you inventory or search for parts. Smart Interchange is at work whether or not you search using a VIN.

† Customize the time range for this data in Checkmate Retro by going to **System Defaults and Yard Settings**

(Checkmate Full: **6,10**. Checkmate Classic: **S3**)

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Interchange Application and Notes

To view interchange application information, click to highlight an interchange option and then click the **APP** button. From this window, you can:

- Submit an interchange contribution by clicking the **IC Contribution** button. For more information about this feature, see the **Interchange Contribution** section of this guide below.
- **Print** interchange application information.
- **Email** interchange application information.

The internal interchange notes made by your Checkmate users can also be modified with the following actions. (Car-Part Interchange notes cannot be modified.)

- **Edit** a note by clicking to highlight the note in the **Exact Interchange Notes** section, then clicking **Edit**.
- **Add** an interchange note.
- **Remove** a note by clicking to highlight the note in the **Exact Interchange Notes** section, then clicking **Remove**.

Interchange Application and Notes : DMR-61598

Exact Interchange Notes

[61598 (User)]
Make sure to verify glass tint

[61598 (ALL)]
VW cover \$53
VW base assy \$107
VW base assy \$238
VW glass \$69
Ident: 1J185750701C
Ident: 1JE85750701C
Available with clear or blue tinted glass.
Cable operated, heated, LH.
OEM #s: 1K08576019B9,3B0857537BGRU,1J1857521B,1J1857521J,1JE85750701C,
1K5949101,1J185750701C,3B1857521A

Exact Models

Model	Year	Description	Interchange
GOLF	99	Cable, Htbk, from 9/98, non-heated, LH	61598
GOLF	00-01	Cable, Htbk, non-heated, LH	61598
GOLF	03-05	Cable, LH non-heated	61598
GOLF	06-09	Cable, VIN J (8th digit), (includes City), non-heated, LH	61598
GOLF	10-11	Cable, City (Canada only), non-heated, LH	61598
JETTA	00-04	Cable, w/o heated; LH	61598
JETTA	05-11	Cable, VIN J (8th digit), (includes City), non-heated, LH	61598
JETTA	05-11	Cable, VIN M (8th digit), (includes City), non-heated, LH	61598

IC Contribution Print Email Edit Add Remove Close

Note: You can only edit or remove notes that have been entered by Checkmate users; you cannot modify Car-Part Interchange notes.

Interchange Contribution

Sales Pro gives you the ability to submit interchange contributions to Car-Part.com's Interchange Development team. Use this feature when you want to submit information that could be useful to other recyclers, or to alert us if you find discrepancies in the interchange. The contributions you submit are sent directly to the Interchange Development team.

To submit an interchange contribution, follow these steps:

1. Click to highlight a part on the **Interchange** tab and then click the **IC Contribution** button.

The screenshot shows the Sales Pro interface with the 'Interchange' tab selected. The table below represents the data shown in the interface:

Interchange Description	Interchange	QOH	Retail	Wholesale	Request	CPLocalReq	CPRegReq	CPGlobalReq	Sales	WStock	ListPrice
ENG (2.4L (VIN E, 5th digit, 2AZFE engine, 4 cyl))											
1) Calif	65123C	1	\$1200.00	\$1200.15	4	133	1230	5441	0	4	\$10255.00
2) Fed	65123B	2			0	748	4845	14036	0	0	\$13980.00
3) 3.0L (VIN F, 5th digit, 1MZFE engine, 6 cyl)											
3) from 1/03	65131	1	\$595.62	\$595.62	1	144	984	2968	0	0	\$0.00
4) thru 12/02	65530M	0	\$425.63	\$425.63	0	160	861	2635	0	0	\$12357.00
5) Non-Interchange Similar Vehicles	AV										
6) Non-Interchange (2003, CAMRY)	NOIC										
7) Non-Interchange SY-EY	NOICSY-EY										
FENDER (FEN)											
8) LH	58928	0	\$100.00	\$100.26	1	93	1161	2605	0	0	\$301.00
9) RH	58927	1	\$100.00	\$100.26	4	115	1109	2396	0	0	\$0.00
10) Non-Interchange Similar Vehicles	AV										
11) Non-Interchange (2003, CAMRY)	NOIC										
12) Non-Interchange SY-EY	NOICSY-EY										
ALT											
13) 4 cyl (80 amp)	60824	1	\$35.30	\$35.30	0	7	77	254	0	0	\$0.00
14) 6 cyl (100 amp)	60825	0	\$55.00	\$55.38	0	7	54	206	0	0	\$397.00
15) Non-Interchange Similar Vehicles	AV										
16) Non-Interchange (2003, CAMRY)	NOIC										
17) Non-Interchange SY-EY	NOICSY-EY										

Note: You can also access this feature from the **Interchange Application** window.

The screenshot shows the 'Interchange Application and Notes' window for part FEN-58927. The window contains the following information:

Exact Interchange Notes

[58927 (ALL)]
 TY Japanese prod \$258
 TY North American prod \$301
 OEM #s: 5380133120,90157105032,53801AA020

Exact Models

Model	Year	Description	Interchange
CAMRY	02-06	RH	58927

The 'IC Contribution' button is highlighted with a red box at the bottom left of the window.

2. The **Interchange Contribution** window opens.

The screenshot shows the 'Interchange Contribution' window with the following data:

General Information					
User Name	User Id	Year	Model	Part Code	IC Number
JONATHANM	7	2003	CAMRY	ENG, F	65123C, €
Contribution Memo					
[Empty text area]					

This window includes three tabs. All of the information in these tabs will be sent to our Interchange Development team:

- **Contribution** captures **General Information** about the user logged into Checkmate and the vehicle in the search
- **Search Screen** captures a screenshot of your search criteria on the **Find** tab
- **Results Screen** captures a screenshot of the **Interchange** tab (If you access this feature from the **Interchange Application** window, this tab captures a screenshot of that window)

Add the **VIN**, your **Full Name**, and **Phone** number in the appropriate fields. Then, enter your interchange contribution in the **Contribution Memo** field.

3. Click **Send**. If you use a default email client, your email client will open a new email with all of the interchange contribution information included. The information you entered is added to the body of the email, and the screenshots Sales Pro captured are sent as an email attachment. It will be automatically addressed to ICContributions@car-part.com.

Note: If you have your email configured in the Checkmate Workstation settings, your interchange contribution will send automatically after you click **Send**.

4. Send the email to ICContributions@car-part.com

Search Results/Beginning a Sale (Parts Tab)

After you select the interchange numbers for your search, the **Parts** tab displays available parts that match your search criteria.

SalesPro X

2005,CAMRY AUTO BODY PRO 444-424-4444 DAVE PRO CREDIT LIMIT : \$1000 AVAILABLE \$1000

Find Interchange **Parts** Quotes Work Order / Invoice POs Credits / Returns

All Parts (4) My Parts (4) Extra Sales (3) Resolution Parts (0) Exchange Parts (0) Alternative Vehicles (0) Alternative Parts (0) Save/Load Filters

Part	Part Name	Year	Model	Grade	Description	Status	Interchange	Cat	Interchange Description	Review	Recommenc	Sale Price	DIS	Total
1 - Extra\$	TRA TRANSMISSION ASSY.	2005	CAMRY				61598C		AT, 6 cylinder, 3.3L (3MZF engine)	No		\$0.00	0	
2	TRA TRANSMISSION ASSY.	2004	CAMRY	A	AT, 6 cylinder, 5 speed, FTWCAR Recycled Original Equ	I	61598A	W	AT, 6 cyl, 5 spd	No		\$157.00	1552	
3 - Extra\$	FEN-R FENDER-R	2005	CAMRY				58927		RH	No		\$0.00	0	
4	FEN-R FENDER-R	2002	CAMRY	B	RH,BEIGE EXT,PAINT CODEis4Q2, PAINT DINGS, MAY N		58927	W	RH	Yes		\$105.00	313	
5	FEN-R FENDER-R	2003	CAMRY	A	RH,MAR ,3Q3,FTWCAR		58927	W	RH	No		\$105.00	752	
6 - Extra\$	HOD HOOD	2005	CAMRY				58606			No		\$0.00	0	
7	HOD HOOD	2002	CAMRY	B	BEIGE EXT,PAINT CODEis4Q2,2P2		58606	W		No		\$137.00	313	

Car-Part	Local-Region-Global	Requests	Sales	Avg Sales	NIS	Lost	QTY	Undamaged	Retail	Wholesale	Export	Core	Date	List Price
44	498	1416	1	0	\$0.00	0	1	2	\$0.00	\$105.00	\$100.00	\$0.00	02/07/2006	\$344.00

Select Line Enter Part or OEM Number OEM Start New Quote Print Pick Slip Start New Work Order Photomate Part Tag Queue Close

Selected Part	Selected Account	Inv/WO	Date	Customer	SLS	Price	Grade

Selected Part	Selected Account	Quote	Date	Customer	SLS	Price	Grade

Warranty Name	Total Retail	Total Whsl	Retail	Whsl
\$0-\$149 6MOS PARTS NO LABOR	\$115.00	\$110.00	\$10.00	\$10.00
\$150-\$249 6MOS PARTS NO LABOR	\$125.00	\$120.00	\$20.00	\$20.00
\$150-\$249 12MOS PARTS NO LABOR	\$145.00	\$140.00	\$40.00	\$40.00
CUSTOMER DECLINED EXT WARRANTY	\$105.00	\$100.00	\$0.00	\$0.00
\$250 & UP 6MOS PARTS NO LABOR	\$115.50	\$110.00	\$10.50	\$10.00
\$250 & UP 12MOS PARTS NO LABOR	\$126.00	\$120.00	\$21.00	\$20.00

Description Private Part Notes

IC - RH

U - RH,BEIGE EXT,PAINT CODEis4Q2, PAINT DINGS, MAY NEED REPAINT

Customize Display

On the **Parts** tab, you can customize your display by:

- Clicking the type of parts you want to see (Resolution Parts, Exchange Parts, Alternative Vehicles, etc.) (see the **View Part Information** section of this document for more information)
- Clicking a column title to sort by that column, resizing columns with your mouse, or clicking and dragging column headers to rearrange columns
- Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).
- Using the horizontal scroll bar to see all the available information for each part (some users find it convenient to use wide-screen monitors with Checkmate Sales Pro, but it is not necessary)
- Clicking the arrow buttons to expand or collapse the bottom two sections of information

The screenshot displays the SalesPro interface with the following components:

- Top Bar:** Shows 'SalesPro' logo, 'INFO TAXABLE', 'CREDIT LIMIT: \$0', and 'AVAILABLE \$1209.4'.
- Navigation Tabs:** 'Find', 'Interchange', 'Parts' (selected), 'Work Order / Invoice', 'POs', 'Credits / Returns'.
- Filter Bar:** 'All Parts (9)', 'My Parts (9)', 'SubYard Parts', 'Extra Sales (1)', 'Resolution Parts (0)', 'Exchange Parts (0)', 'Alternative Vehicles (0)', 'Alternative Parts (0)'. Includes a 'Save/Load Filters' button.
- Main Table:** Columns include Part, Year, Model, Grade, Interchan, Description, Sale Price, Cond, Interchange Description, Status, Recommend, Total Retail. Rows list various car parts like FTWCAR, BLK,FTWCAR, BLK,LITE WEAR,FTWCAR, etc.
- Summary Row:** Car-Part, Reques, Sales, Avg, NIS, Lost, QTY, Undamage, Retail, Wholesal, Export, Core, Date, List Price.
- Action Bar:** 'Enter Part or OEM Number', 'OEM', 'Start New Quote', 'Print Pick Slip', 'Start New Work Order', 'Photomate', 'Part Tag Queue', 'Close'.
- Part Details Section:** 'Selected Account', 'Selected Part', 'Warranty Name' table, and 'Private Part Notes' with images of a steering wheel.

Filter Search Results

Filters allow you to view only certain parts in this list (e.g., you may filter by the **Grade** column to only see parts of a certain grade).

On the **Parts** screen, click the filter icon in any column heading to limit your search results. When you select a filter, your search results will display *only* parts that match that filter.

	Part	Year	Model	Grade	Description	Interchange
<input type="checkbox"/>	1	ENG	2012	HONDA CRZ		
<input type="checkbox"/>	2	ENG	2012	HONDA CRZ	X	
<input type="checkbox"/>	3	ENG	2012	VOLKSWAGEN JE	X	

Here's how it works

1. On any column, click the filter icon.
2. A menu opens with the options available for that filter. There are several types of filters that may appear, depending on the column you are filtering:
 - Filters based on phrases (e.g., "Begins With" or "Equals"). When you select one of these filters, you will be prompted to fill in the remaining information.
 - For example, on the **Description** column includes a filter called "Contains." If you select this filter option, the following window will appear. Enter "Right" and click **Accept** to filter your search results to *only* show parts with a description that contains "Right."

Text Contains on Column [Description]

Right

Help Accept Cancel

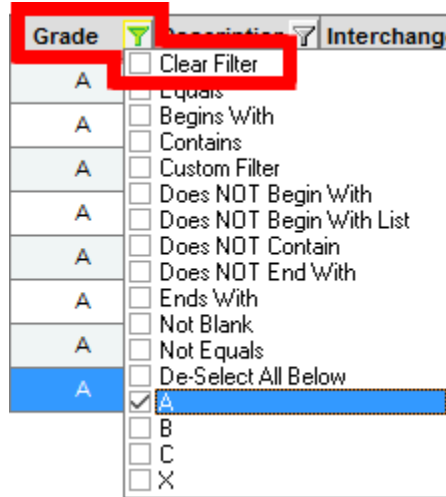
- Exact filters. The filter menu may display options that allow you to select exact information to filter by.
 - For example, in the **Grade** column, you can simply click the **A** filter to filter your results to *only* show parts with a grade of A.

Grade	Description	Interchange
<input type="checkbox"/>	Clear Filter	
<input type="checkbox"/>	Equals	
<input type="checkbox"/>	Begins With	
<input type="checkbox"/>	Contains	
<input type="checkbox"/>	Custom Filter	
<input type="checkbox"/>	Does NOT Begin With	
<input type="checkbox"/>	Does NOT Begin With List	
<input type="checkbox"/>	Does NOT Contain	
<input type="checkbox"/>	Does NOT End With	
<input type="checkbox"/>	Ends With	
<input type="checkbox"/>	Not Blank	
<input type="checkbox"/>	Not Equals	
<input type="checkbox"/>	De-Select All Below	
<input checked="" type="checkbox"/>	A	
<input type="checkbox"/>	B	
<input type="checkbox"/>	C	
<input type="checkbox"/>	X	

- Custom filters. If you select this filter, you can use the window that opens to create your own filter. For help constructing your custom filter, click the **Help** button for information about what is valid. (This is recommended only for advanced users.)

3. When a filter is applied to a column, that column's filter icon turns green to indicate that a filter is active.

- You can clear this filter by clicking on the green filter icon and selecting **Clear Filter**.



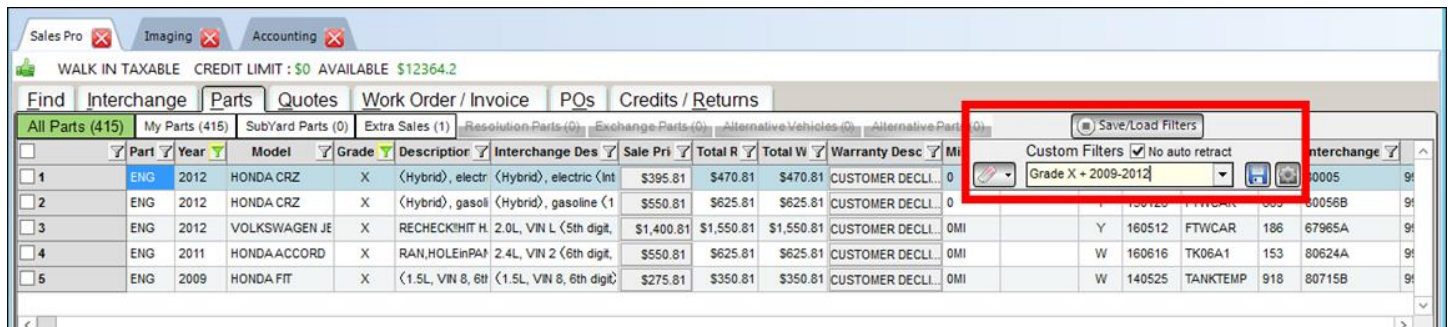
Note: Multiple filters can be applied simultaneously (for example, you could now add a filter in the **Year** column to only show parts with a grade of X *and* a year of 2009-2012).

Save/Load Custom Filter Settings

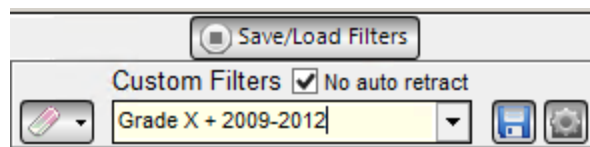
If you use the same filter(s) regularly, you can now save your favorite custom filter settings for future use with the **Save/Load Filters** button.

To save custom filter settings, follow these steps:

1. Perform a search and apply the filters to the search results.
2. Click the **Save/Load Filters** button.



3. The **Custom Filters** box opens. In the empty field, type a descriptive name for this filter (e.g., “Grade X + 2009-2012”).



4. Click the **Save** disk icon. A message will appear confirming that the filter has been saved.

Note: The **No auto retract** setting will keep this **Custom Filters** box open for the remainder of this part search. If this box is not checked, the **Custom Filters** box will automatically retract when you click outside the box.

There is no limit to the number of custom filters you can create. Custom filters that you create in Sales Pro are visible and available to all Sales Pro users at your business. Custom filters created in Sales Pro are not available in the Checkmate Inventory tool.

Using Saved Custom Filter Settings

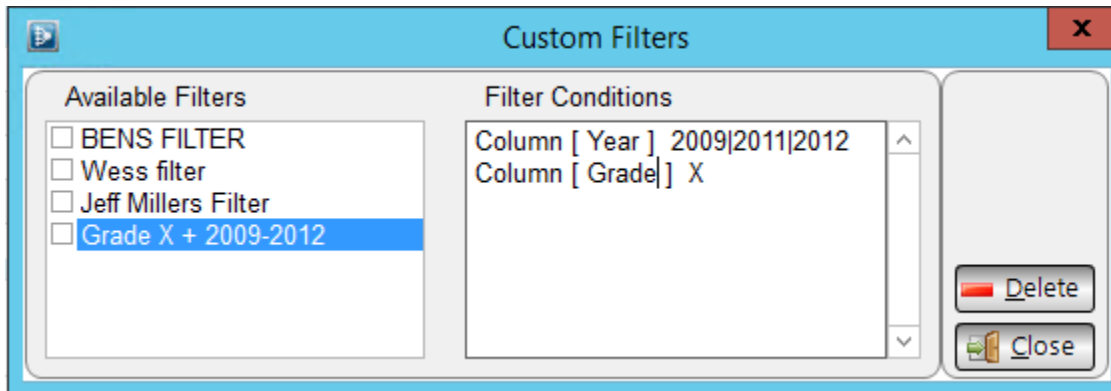
Once a custom filter has been saved, you can use it on any search results. To use a saved custom filter, follow these steps:

1. Perform a search.
2. Click the **Save/Load Filters** button.
3. The **Custom Filters** window opens. Use the drop-down box to select from the available saved custom filters. When you select a custom filter, your search results will be immediately filtered according to those settings.
 - The **No auto retract** setting applies to this **Custom Filters** window. When this box is checked, the window will stay open until the next part search.
4. To remove a custom filter, click the eraser icon to remove the last applied filter.

Viewing/Removing a Custom Filter

If you wish to view the details of a custom filter, or remove it from your saved filters, follow these steps:

1. Perform a search.
2. Click the **Save/Load Filters** button.
3. Click the gear icon to access the Custom Filters settings.
4. A window opens listing each available custom filter. Click on a filter name to select it. When a filter name is selected, the **Filter Conditions** column lists the details of this filter.
5. If you wish to delete this saved filter, click the checkbox to select it, then click **Delete**.



View Part Information

The **Parts** tab is broken down into separate categories:

- **All Parts** – All of your available parts. This includes Car-Part Exchange parts, non-exact parts, extra sales, and parts that are inventoried in other locations than the one you specified when logging in to Checkmate. By default, **All Parts** are shown when the **Parts** tab opens, but this can be changed in the Sales Pro settings.
- **My Parts** – Only your inventory and extra sales.
- **SubYard Parts** – All of your available parts that are inventoried in other locations than the yard you specified when logging in to Checkmate.
- **Extra Sales** – Interchange numbers for parts you looked up, so you can sell parts you haven't inventoried or parts you are brokering from other part suppliers.
- **Resolution Parts** – Parts "in resolution" (i.e., it needs interchange assigned to it). See the **Resolution Parts** section of this guide for more information.
- **Exchange Parts** – Parts you can sell through your Car-Part Exchange partners. This tab is only available to Car-Part Exchange subscribers.
- **Alternative Vehicles** – Only populated if you selected the **Non-interchange Similar Vehicles** option on the **Interchange** tab.
- **Alternative Parts** – Only populated if you select the **NOIC** (Non-Interchange) or **NOICSYEY** (Non-interchange Start Year-End Year) option on the **Interchange** tab.

The screenshot shows the Sales Pro interface for a 2005 Toyota Camry. The 'Parts' tab is active, and the 'All Parts (45)' sub-category is selected. The table below lists the part details:

	Pick	Part	2 Ch	Year	Model	Grade	Stock	Description	Sale Pri	Interchange	Base Retail
1 - Extra\$	<input type="checkbox"/>	FEN-R	CF	2005	TOYOTA CAMRY				\$0.00	58927	\$0.00

Click to select a part in the list. More information about this specific part is now visible:

- A. Car-Part.com request activity (Local, Regional, and Global)
 - This data is only available to Advanced Bidmate subscribers. Contact your sales rep to learn more.
- B. Your own business's request and sales history
- C. Price Book Information (to change the Price Book, use the **Edit** button)
- D. Core value of the selected part (Advanced Bidmate subscribers can view the core value and click inside this field to see potential core buyers)
- E. **Vehicle** information including **Parts Sold**, **Parts Deleted**, **Parts Remaining** and **AUT** information (more information in the **Parts Sold**, **Parts Deleted**, **Parts Remaining**, and **AUT Information (Vehicle Button)** section of this guide, below)
- F. View interchange application information by clicking the **APP** button
- G. View **Part History** for the selected part by clicking the **History** button (or click the arrow to view **Part Requests**)
- H. Work orders/invoices for the **Selected Part** and work orders/invoices for the **Selected Account**
- I. Quotes for the **Selected Part** and quotes for the **Selected Account**
- J. Warranties available for the selected part
- K. Notes on:
 - Interchange Description
 - User Description
 - Exchange Partner details (if it is an Exchange Sale part)
 - Private Part Notes
- L. Images associated with this part and vehicle (more information in the **Image Viewer** section of this guide, below)

The screenshot displays the SalesPro interface for a 2010 CAMRY. The main table lists various parts, with the 3.5L engine (Part 4) selected. Below the table, the 'Selected Part' section shows details for the 3.5L engine, including a list of quotes from different suppliers and a table of warranties. The 'AUT Images' section at the bottom shows several images of the vehicle. Red callout letters A through L are placed over various UI elements to correspond with the list items above.

Parts Sold, Parts Deleted, Parts Remaining, and AUT Information (Vehicle Button)

Clicking the **Vehicle** button opens a window that displays information about the vehicle including a list of parts that were sold, parts that were deleted, parts that are available, and AUT information. To open this window:

1. Click to highlight a part.
2. Click the **Vehicle** button.

The screenshot shows the 'Inventory' window for a 2005 CAMRY. The window title is 'SalesPro Inventory'. At the top, it displays '2005,CAMRY INFO TAXABLE CREDIT LIMIT: \$0 AVAILABLE \$1209.4'. Below this is a navigation bar with tabs for 'Find', 'Interchange', 'Parts', 'Quotes', 'Work Order / Invoice', 'POs', and 'Credits / Returns'. The main area is a table of parts with columns: Part, Year, Model, Interchan, Description, Sale Price, Interchange Description, Status, Recommend, Total Retail, and Cat. Row 2 is highlighted in blue, and a red circle with the number '1' points to the 'CAMRY' model. At the bottom of the window, there is a summary table with columns: Car-Part, Reques, Sales, Avg, NIS, Lost, QTY, Undamage, Retail, Wholesal, Export, Core, Date, and List Price. Below the summary table are several buttons: 'Select Line', 'Enter Part or OEM Number', 'OEM', 'Start New Quote', 'Print Pick Slip', 'Start New Work Order', 'Photomate', 'Part Tag Queue', and 'Close'. A red circle with the number '2' points to the 'Vehicle' button in the bottom right corner.

Part	Year	Model	Interchan	Description	Sale Price	Interchange Description	Status	Recommend	Total Retail	Cat
1 - Extra\$	FEN-L	2005	CAMRY	58928	\$0.00	LH		Push	\$0.00	
2	FEN-L	2005	CAMRY	58928	\$105.00	LH,gry,3K1,NIQ,FTW		Push	\$105.00	Y 113
3	FEN-L	2004	CAMRY	58928	\$105.00	LH,NIQ,2B2,SLVR,FTWCAR		Push	\$105.00	Y 712
4	FEN-L	2003	CAMRY	58928	\$105.00	LH,BLU PAINT CODE=8Q2,FTWCAR		Push	\$105.00	W 176
5	FEN-L	2003	CAMRY	58928	\$105.00	LH,SP1,WHITE ,040,FTWCAR		Push	\$105.00	W 183
6	FEN-L	2002	CAMRY	58928	\$105.00	TEST DO NOT SELL		Push	\$105.00	
7	FEN-L	2002	CAMRY	58928	\$105.00	LH,BLUE ,PAINT CODEis8Q0,FTWCAR		Push	\$105.00	Y 180
8 - Extra\$	FEN-R	2005	CAMRY	58927	\$0.00	RH			\$0.00	
9	FEN-R	2004	CAMRY	58927	\$52.50	RH,NIQ,2B2,SLVR,FTWCAR			\$52.50	Y 712
10	FEN-R	2003	CAMRY	58927	\$105.00	RH,MAR ,3Q3,FTWCAR			\$105.00	W 256

Car-Part	Reques	Sales	Avg	NIS	Lost	QTY	Undamage	Retail	Wholesal	Export	Core	Date	List Price
95 657 1917	0	0	\$0.00	0	0	4	\$0.00	\$105.00	\$100.26	\$0.00		02/07/200	\$344.00

This window is helpful when selling multiple parts from the same vehicle. The VIN, amount you paid for the vehicle, and days to break even are listed at the top of this window.

Parts Sold

The **Parts Sold** tab lists parts from this vehicle that were sold. From this tab, you can highlight a part, and then click the **View** button to open the invoice for the selected part.

Date	Part	Model	Year	Account	Name	Invoice	Price	Yard
08/06/2014	AFM	CAMRY	2005			100258	\$5.00	999
03/02/2015	ALT	CAMRY	2005			101628	\$30.00	999
10/02/2014	BWN	CAMRY	2005			102958	\$75.00	999
08/08/2014	CAL	CAMRY	2005			99802	\$10.00	999
08/08/2014	CAL	CAMRY	2005			99802	\$10.00	999
09/18/2014	COM	CAMRY	2005			102577	\$65.00	999
08/01/2014	ENG	CAMRY	2005			101479	\$1,050.00	999
01/21/2015	FDW	CAMRY	2005			105367	\$75.00	999
05/18/2016	FEN	CAMRY	2005			115233	\$100.00	999
05/18/2016	FEN	CAMRY	2005			115234	(\$100.00)	999
03/10/2017	FEN	CAMRY	2005			121105	\$100.00	999
03/10/2017	FEN	CAMRY	2005			121106	(\$100.00)	999
11/11/2014	LID	CAMRY	2005			103903	\$150.00	999
08/11/2014	QTR	CAMRY	2005			101642	\$150.00	999
10/07/2014	QTR	CAMRY	2005			103070	\$125.00	999
08/11/2014	RDR	CAMRY	2005			101653	\$100.00	999

Note: The amount displayed on the **Parts Sold** tab, indicates the total amount of part sales you have made so far for this vehicle.

Parts Deleted

The **Parts Deleted** tab lists the parts from this vehicle that have been deleted from your inventory.

Date Deleted	Part	Model	Year	User	Retail	Wholesale	Comments	Total Retail	Total Wholes
10/07/2014	ACL	CAMRY	2005		100.00	100.29		\$4,769.20	\$4,754.29
10/16/2014	ASH	CAMRY	2005		50.00	50.58	BAD		
10/07/2014	BAG	CAMRY	2005		150.00	150.56			
10/07/2014	BMT	CAMRY	2005		75.00	75.19			
08/05/2014	CAL	CAMRY	2005		50.00	50.58	GONE		
08/05/2014	CAL	CAMRY	2005		50.00	50.58	GONE		
10/07/2014	CBX	CAMRY	2005		50.00	50.29			
10/07/2014	CBX	CAMRY	2005		50.00	50.58			
10/07/2014	CNS	CAMRY	2005		75.00	75.57			
10/07/2014	CSW	CAMRY	2005		50.00	50.57			
10/07/2014	CVC	CAMRY	2005		0.00	0.00			
10/16/2014	DMR	CAMRY	2005		50.58	50.58	GONE		
10/07/2014	DMR	CAMRY	2005		50.49	50.49			
10/07/2014	DPN	CAMRY	2005		125.00	125.58			
10/07/2014	DSF	CAMRY	2005		50.00	50.57			
10/07/2014	DWM	CAMRY	2005		50.48	50.48			

Parts Remaining

The **Parts Remaining** tab lists the parts from this vehicle that are available for sale. The **Stock #** button adds all of these parts to the search results on the **Parts** tab.

Warning: The **Stock #** button completely replaces any parts that were previously listed in the results and gives you access to a complete list of available parts for the vehicle. Any parts you had selected before pressing this button will *not* be selected after you press this button.

Part	Model	Year	Description	Retail	Wholesale	Total Retail	Total Wholesale
FEN	CAMRY	2005	LH_gry,3K1,NIQ,FTW	105.00	100.26	\$157.50	\$150.26
RDO	CAMRY	2005	receiver (with CD), w/o na...	52.50	50.00		

AUT

The **AUT** tab displays AUT information for this vehicle. This information cannot be edited from this screen. For information about editing an AUT record, see the **Edit AUT** section of this guide.

Part Description

Stock Number: 140738 Date Entered: 07/29/2014 Status:

Year: 2005 Vehicle Category: D Location: CRUSH

Part: AUTOMOBILE Cost: 1635 Yard: 999

Model: TOYOTA CAMRY

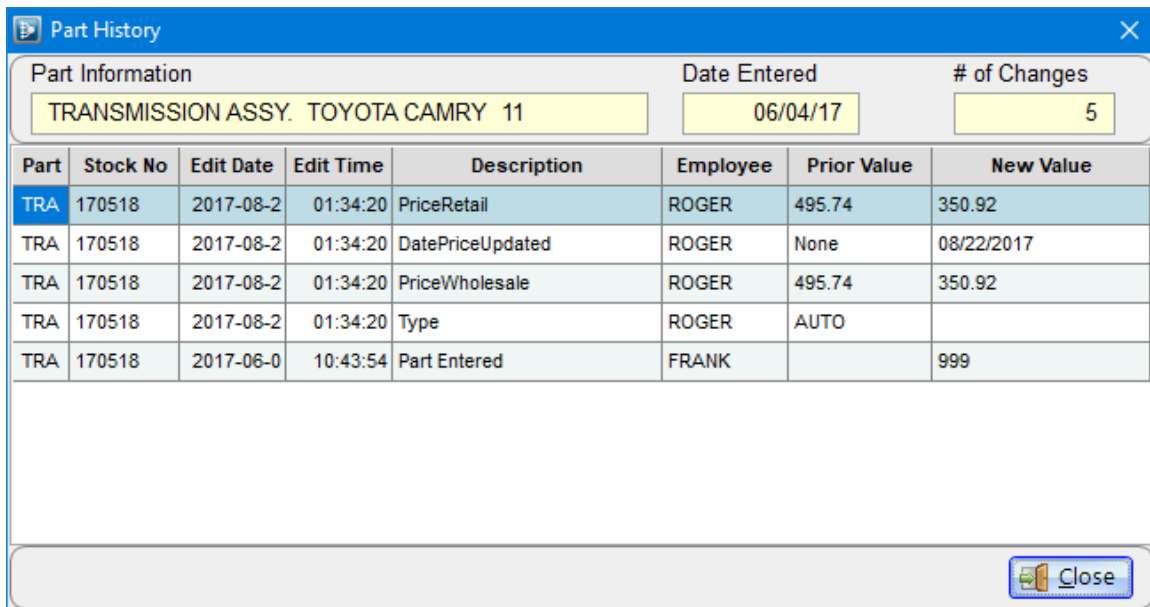
Miles: 113000

Condition:

Description: 08/04, GRY,4DR,AT,HT FT,113K,FTWCAR

Part History

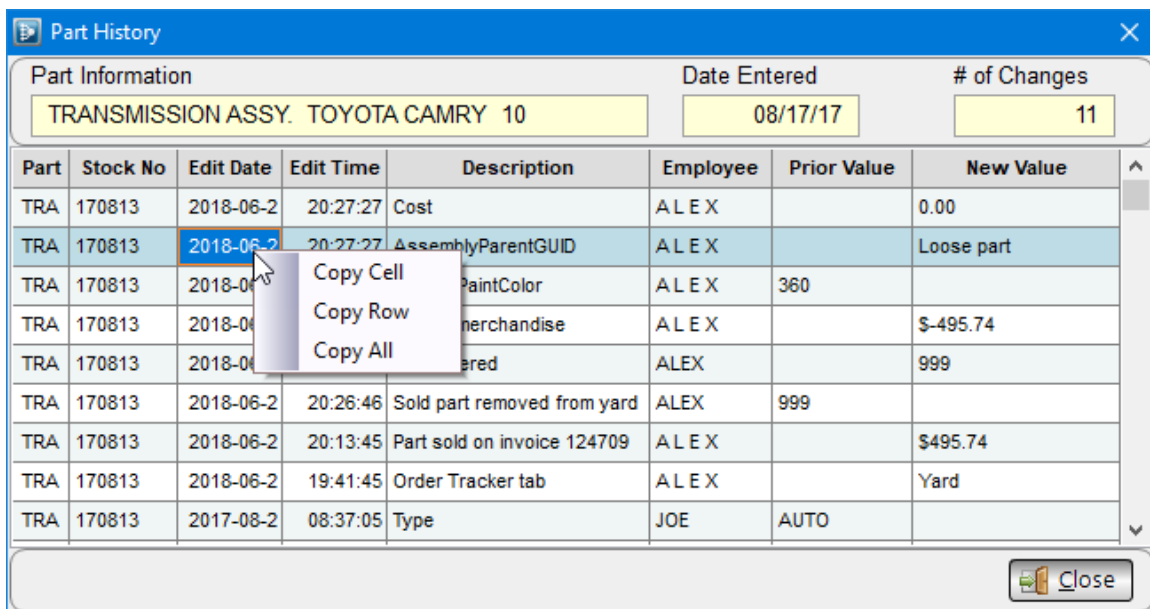
To view a part's edit history, click on the part to highlight it and then click the **History** button to open the **Part History** window.



Part Information					Date Entered	# of Changes	
TRANSMISSION ASSY. TOYOTA CAMRY 11					06/04/17	5	
Part	Stock No	Edit Date	Edit Time	Description	Employee	Prior Value	New Value
TRA	170518	2017-08-2	01:34:20	PriceRetail	ROGER	495.74	350.92
TRA	170518	2017-08-2	01:34:20	DatePriceUpdated	ROGER	None	08/22/2017
TRA	170518	2017-08-2	01:34:20	PriceWholesale	ROGER	495.74	350.92
TRA	170518	2017-08-2	01:34:20	Type	ROGER	AUTO	
TRA	170518	2017-06-0	10:43:54	Part Entered	FRANK		999

You can copy the part history information that displays on the **Part History** window to your clipboard and then paste it into a text editor or spreadsheet program. Here's how it works:


1. On the **Part History** window, begin by right-clicking on a line.



Part Information					Date Entered	# of Changes	
TRANSMISSION ASSY. TOYOTA CAMRY 10					08/17/17	11	
Part	Stock No	Edit Date	Edit Time	Description	Employee	Prior Value	New Value
TRA	170813	2018-06-2	20:27:27	Cost	ALEX		0.00
TRA	170813	2018-06-2	20:27:27	AssemblyParentGUID	ALEX		Loose part
TRA	170813	2018-06-2	20:27:27	PaintColor	ALEX	360	
TRA	170813	2018-06-2	20:27:27	Merchandise	ALEX		-\$495.74
TRA	170813	2018-06-2	20:27:27	Part Entered	ALEX		999
TRA	170813	2018-06-2	20:26:46	Sold part removed from yard	ALEX	999	
TRA	170813	2018-06-2	20:13:45	Part sold on invoice 124709	ALEX		\$495.74
TRA	170813	2018-06-2	19:41:45	Order Tracker tab	ALEX		Yard
TRA	170813	2017-08-2	08:37:05	Type	JOE	AUTO	

2. From the menu that appears, select the option for the information you want to copy.

3. Paste this information into a text editor or spreadsheet program (e.g., Microsoft Excel).

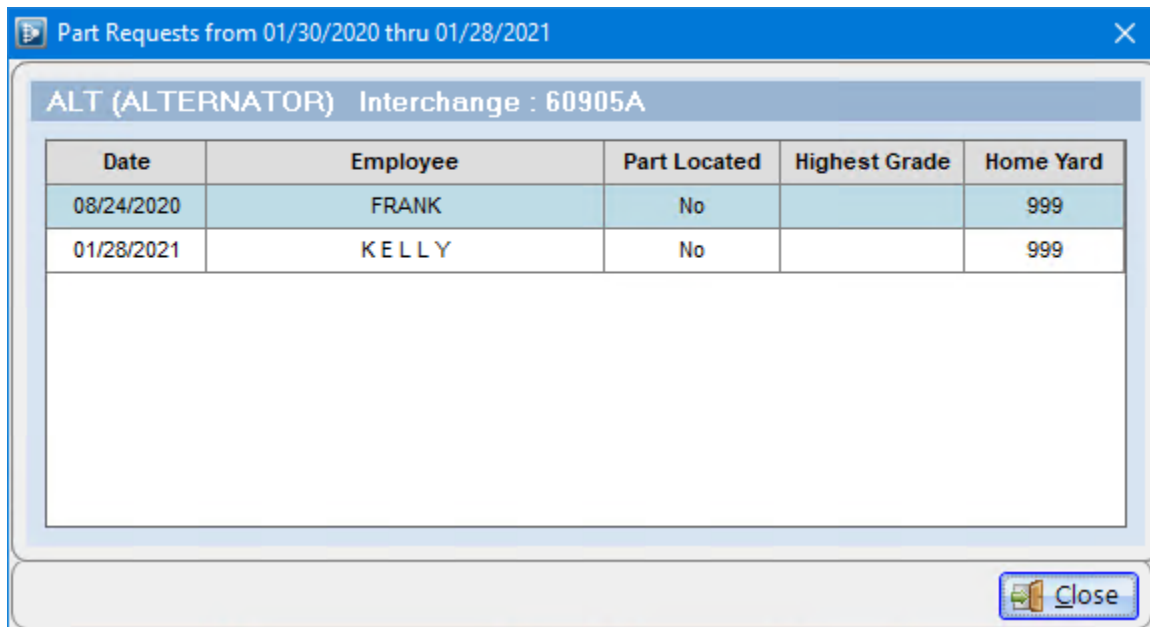
 **Note:** In most programs, you can paste by pressing **Ctrl+V** on your keyboard, or going to **Edit>Paste**.

	A	B	C	D	E	F	G	H
1	Part	Stock No	Edit Date	Edit Time	Description	Employee	Prior Value	New Value
2	TRA	170813	6/22/2018	20:27:27	Cost	A L E X		0
3	TRA	170813	6/22/2018	20:27:27	AssemblyParentGUID	A L E X		Loose part
4	TRA	170813	6/22/2018	20:27:27	PrimaryPaintColor	A L E X	360	
5	TRA	170813	6/22/2018	20:26:57	Return merchandise	A L E X		(\$495.74)
6	TRA	170813	6/22/2018	20:26:46	Part Entered	ALEX		999
7	TRA	170813	6/22/2018	20:26:46	Sold part removed from yard	ALEX	999	
8	TRA	170813	6/22/2018	20:13:45	Part sold on invoice 124709	A L E X		\$495.74
9	TRA	170813	6/22/2018	19:41:45	Order Tracker tab	A L E X		Yard
10	TRA	170813	8/23/2017	8:37:05	Type	JOE CHASTAIN	AUTO	
11	TRA	170813	8/22/2017	15:06:31	Location	JOE CHASTAIN	FTWCAR	TJ60D1
12	TRA	170813	8/17/2017	17:46:50	Part Entered	FRANK		999

Part Requests

To view information about the times a part has been looked up at your business, click on the part to highlight it and then click down arrow on the **History** button and select **Part Requests**.

The title bar of the window displays the timeframe that requests are being displayed for.



Part Requests from 01/30/2020 thru 01/28/2021				
ALT (ALTERNATOR) Interchange : 60905A				
Date	Employee	Part Located	Highest Grade	Home Yard
08/24/2020	FRANK	No		999
01/28/2021	KELLY	No		999

Image Viewer

When a part is selected, any available part or vehicle images are visible at the bottom of the **Parts** tab. Double-click an image to open the **Image Viewer** window, which you can use to zoom in/out, expand the image to fit the window, email, or print the image.

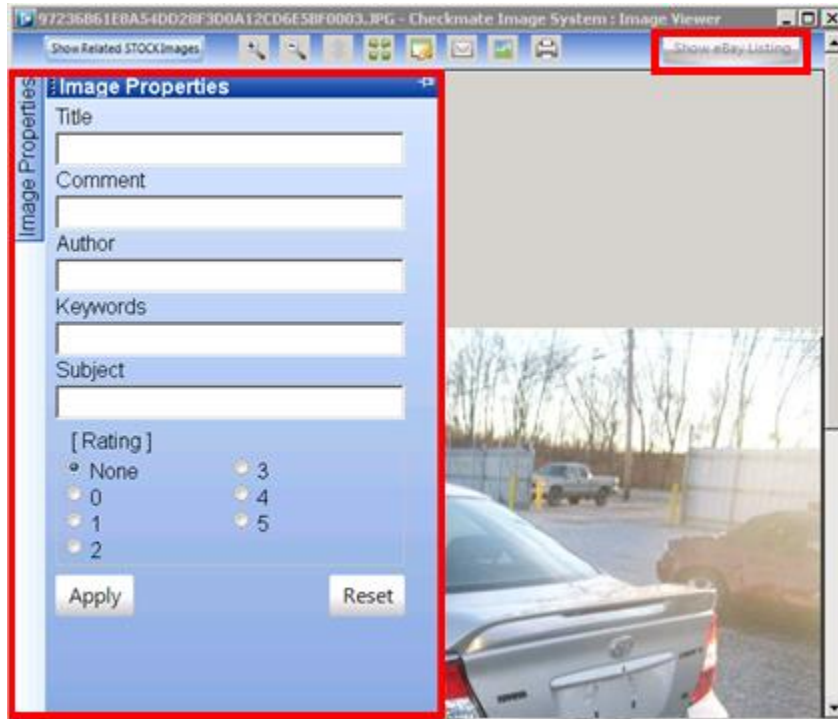


Click the **Show Related STOCK Images** button to view all images associated with the AUT record or the rest of this vehicle.



If you like, you can click the **Image Properties** button to enter a **Title**, **Comment**, **Author**, **Keywords**, and **Subject** for the image. You can also rate the image on a scale of 0 to 5. *These notes are only for your reference and are not visible outside of the **Image Properties**.* Click **Apply** to apply the changes.

If an item is listed on eBay, you can click the **Show eBay Listing** button to view the eBay listing.



Part Sale Actions

From the **Parts** tab, you can use the following features to sell a part:

Extra Sale

Extra Sale is the function you use to sell parts that are not in your inventory. Perhaps you have these parts in stock but they had just not yet been inventoried in Checkmate, or perhaps you are brokering a part from another recycler.

1. To create an Extra Sale, click the **Extra\$** button to the left of the part list.

Part	Year	Model	Grade	Stock	Description	Sale Pri	Interchange	Core Pr	DIS	Interchange Des	Recommend	Status	Total R	Miles
1 - Extra\$	ENG	2003	TOYOTA CAMRY			\$0.00	65131	\$75.00		3.0L (VIN F, 5TH DIGIT	Over\$		\$75.00	
2	ENG	2003	TOYOTA CAMRY	A	130824	\$595.62	65131	\$75.00	929	3.0L (VIN F, 5th digit,	Over\$		\$670.62	168K
3	ENG	2002	LEXUS ES300	C	141030	\$595.62	65131	\$75.00	509	(3.0L, VIN F, 5th digit,	Over\$	W	\$670.62	0MI
4 - Extra\$	FEN-R	2003	TOYOTA CAMRY			\$0.00	58927			RH	Over\$		\$0.00	
5	FEN-R	2005	TOYOTA CAMRY	C	130614	\$100.00	58927		996	RH	Over\$		\$100.00	98000
6	FEN-R	2002	TOYOTA CAMRY	C	150301	\$100.00	58927		339	RH	Over\$	W	\$100.00	19900
7	FEN-R	2002	TOYOTA CAMRY	A	150611	\$100.00	58927		262	RH	Over\$		\$100.00	16800
8 - Exchange\$	ALT	2003	TOYOTA CAMRY			\$0.00	60825	\$25.00		6 CYL (100 AMP)	Push		\$25.00	

2. The **Extra Sale** window opens. Enter the stock number by one of these methods:

- Enter the stock number in the **Stock** field.
- Click the VUC in the **AV Lookup** section below to apply the sale to the correct stock number and location.
 - The **AV Lookup** section displays the VUCs for similar years and models in your yard(s). You can print this information by clicking the printer icon (🖨️) button.

Extra Sale - ENG-65123B

Stock: Quantity: Sale Price: Brokered (PO)

Location: Yard: Vendor: Cost: Department:

🖨️ AV Lookup

Vehicle	Model	Year	Location	Stock	Description	Yard
ENG-VUC	TOYOTA CAMRY	02	FD-16A	170606	01/02,GLD,4DR,93K,AT,HT RR,FTW	999
ENG-VUC	TOYOTA CAMRY	02	FTWCAR	170612	03/02,SLVR,176K,4DR,AT,FTW	999

Private Part Notes

3. Select the **Quantity** and enter the **Location** and **Yard** (if applicable).
4. If you are brokering the part:
 - a. Check the **Brokered (PO)** checkbox.
 - b. Use the **Vendor** field to find the Vendor. Enter the vendor name or click the magnifying glass button to add a new customer account.
 - c. Enter the **Cost** you are paying for this part. Click the blank box if you would like to use a calculator.
 - d. Enter the **Sale Price** you are selling the part for. Click the blank box if you would like to use a calculator.
 - e. Select a **Department** (if applicable).
5. Create the Extra Sale by clicking one of the following:
 - **Create Sale** to create the sale and return to the results on the **Parts tab**
 - **Create Sale Quote** to create the sale and proceed to the **Quotes tab**
 - **Create Sale WO** to create the sale and proceed to the **Work Order/Invoice tab**
 - **Apply and Create Another Sale** to create this sale and immediately begin creating another Extra Sale.
6. When you create the Extra Sale and return to the **Parts** tab, the Extra Sale is added to the bottom of the **Extra Sales** list. You can now add it to a quote or work order. Sales Pro automatically enters the vendor information on the quote or work order you create for brokered Extra Sale parts.

 **Notes:**

- When a work order is created for a brokered Extra Sale part, a purchase order is created automatically. See the **Create Purchase Orders (POs Tab)** section of this guide for more information about purchase orders.
- Once you create a work order for Extra Sale parts, Sales Pro will generate an inventory record for those parts if your settings* are configured to support this feature. This allows you to re-inventory the part(s) after a return.

* Configure this in Checkmate Retro using the **Sales Questions** function (Checkmate Full: **6,10,4**. Checkmate Classic: **S3,4**)

Exchange Sale

Car-Part Exchange provides you with immediate access to the inventories of the yards you frequently do business with. By mutual agreement, these selected yards become your Exchange Partners in Checkmate. Exchange Sales in Sales Pro are for parts that you are selling through your Car-Part Exchange partners. (For more information, contact your sales rep.)

1. To create an Exchange Sale, click the **Exchange\$** button to the left of the part list.

	Pick	Part	Year	Model	Grade	Stock	Description	Sale Pri	Interchange	Core Pr	DIS	Interchange Des	Recommen	Status	Total R	Miles
1 - Extra\$	<input type="checkbox"/>	ENG	2003	TOYOTA CAMRY				\$0.00	65131	\$75.00		3.0L (VIN F, 5TH DIGIT	Over\$		\$75.00	
2	<input type="checkbox"/>	ENG	2003	TOYOTA CAMRY	A	130824	3.0L (VIN F, 5th	\$595.62	65131	\$75.00	929	3.0L (VIN F, 5th digit	Over\$		\$670.62	168K
3	<input type="checkbox"/>	ENG	2002	LEXUS ES300	C	141030	(3.0L, VIN F, 5th	\$595.62	65131	\$75.00	509	(3.0L, VIN F, 5th digit	Over\$	W	\$670.62	0MI
4 - Extra\$	<input type="checkbox"/>	FEN-R	2003	TOYOTA CAMRY				\$0.00	58927			RH	Over\$		\$0.00	
5	<input type="checkbox"/>	FEN-R	2005	TOYOTA CAMRY	C	130614	RH,NIQ,3K1,BLK	\$100.00	58927		996	RH	Over\$		\$100.00	98000
6	<input type="checkbox"/>	FEN-R	2002	TOYOTA CAMRY	C	150301	RH,OT3 REPAIR	\$100.00	58927		339	RH	Over\$	W	\$100.00	19900
7	<input type="checkbox"/>	FEN-R	2002	TOYOTA CAMRY	A	150611	RH,PURPLE,FTV	\$100.00	58927		262	RH	Over\$		\$100.00	16800
8 - Exchange\$	<input type="checkbox"/>	ALT	2003	TOYOTA CAMRY				\$0.00	60825	\$25.00		6 CYL (100 AMP)	Push		\$25.00	

2. The **Exchange Sale** window opens. The **Stock** number, **Sale Price**, **Location**, and **Cost** are filled in automatically.

Note: If you have the vendor set up in the **Advanced Purchase Orders: Assign Accounts**, you won't have to look up the vendor when creating an Exchange Sale.

Exchange Sale - ENG-72632

Stock **Sale Price** Brokered (PO)

Location **Vendor** **Cost** **Department**

3. Contact the seller to confirm that you can purchase this part. (When you click to highlight an Exchange Sale part, details about this seller are displayed on the **Description** tab in the search results. Use this information to contact the seller.)

Car-Part	Local	Region	Global	Requests	Sales	Avg Sales	HIS	Lost	QTY	Unc
178	342	753		1	0	\$0.00	0		0	

Description Private Part Notes

New Richmond Recyclers
 765 JFK Blvd.
 New Richmond, OH, 45157
 555-555-5555
 Jonathan@NewRichmondRecyclers.com
 IC - 60825

Current User CHECKMATE USER (CM) Yard 4599

* You can access this function in Checkmate Retro: (Checkmate Full: **5,12,21,2**. Checkmate Classic: **V12,21,2**.)

4. Review or edit the **Sale Price** and **Cost**. Edit the **Sale Price** to include any markup you wish to apply to the sale. Click the blank box if you would like to use a calculator.
5. Select a **Department** (if applicable).
6. Create the Exchange Sale by clicking one of the following:
 - **Create Exchange Sale** to create the sale and return to the results on the **Parts** tab. When you return to the **Parts** tab, the Exchange Sale is added to the bottom of the **All Parts** list. You can now add it to a quote or work order.
 - **Create Sale Quote** to create the sale and start a quote
 - **Create Sale WO** to create the sale and start a work order

Note: When a work order is created for an Exchange Sale part, a purchase order is created automatically. See the **Create Purchase Orders (POs Tab)** section of this guide for more information about purchase orders.

Start New Quote

To start a new quote, follow these steps:

1. From your search results on the **Parts** tab, check the part(s) you want to add to the quote (if you added Extra\$ or Exchange\$ parts, these will also be included).
2. Click the **Start New Quote** button to start a quote. Click the arrow to add to a previous or existing quote.

The screenshot shows the SalesPro interface with a parts list table. A red circle with the number '1' highlights the 'Start New Quote' button at the bottom of the interface. The table contains the following data:

Part	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description	Status	Recommenc	Total Retail
1 - Extra\$	2005	CAMRY	A	65131	3.0L (VIN F, 5th digit, 1MZF engine, 6 cylinder), FTWCAR	\$0.00		3.0L (VIN F, 5th digit, 1MZF engine, 6 c			\$40.00
2	2004	CAMRY	A	65131	3.0L (VIN F, 5th digit, 1MZF engine, 6 cylinder), FTWCAR	\$334.67	177K	ENGINE ASSEMBLY			\$374.67
3 - Extra\$	2005	CAMRY	A	58606		\$0.00				Push	\$0.00
4	2003	CAMRY	A	58606	5P1,WHITE ,040,FTWCAR	\$137.34	1cc			Push	\$137.34
5	2002	CAMRY	A	58606	3P1,BLUE ,PAINT CODE#8Q0,FTWCAR	\$105.00	1cc			Push	\$105.00

Note: If an error message appears indicating that there is an unsellable part, this means that at least one checked part is unsellable.*

3. The **Quotes** tab opens. For more information about this tab, see the **Quote Parts (Quotes Tab)** section of this guide.

* You can review your yard settings for unsellable parts in Checkmate Retro using the **Find and Sell display suppressions** function (Checkmate Full: **6,10,14**. Checkmate Classic: **S3,15**).

Start New Work Order

To start a new work order, follow these steps:

1. From your search results on the **Parts** tab, check the part(s) you want to add to the work order (if you added Extra\$ or Exchange\$ parts, these will also be included).
2. Click the **Start New Work Order** button to start a work order. Click the arrow to add to a previous or existing work order.

The screenshot shows the SalesPro interface with a parts list. The 'Start New Work Order' button is highlighted with a red box and a red arrow. The parts list includes:

Part	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description	Status	Recommend	Total Retail
1 - Extra\$	2005	CAMRY	A	65131	3.0L (VIN F, 5th digit, 1M2FE engine, 6 cylinder),FTWCAR	\$0.00	177K	3.0L (VIN F, 5th digit, 1M2FE engine, 6 c			\$40.00
2	2004	CAMRY	A	65131	3.0L (VIN F, 5th digit, 1M2FE engine, 6 cylinder),FTWCAR	\$334.67		ENGINE ASSEMBLY			\$374.67
3 - Extra\$	2005	CAMRY	A	58606		\$0.00				Push	\$0.00
4	2003	CAMRY	A	58606	SP1.WHITE ,040,FTWCAR	\$137.34	1cc			Push	\$137.34
5	2002	CAMRY	A	58606	3P1.BLUE ,PAINT CODE#8Q0,FTWCAR	\$105.00	1cc			Push	\$105.00

Note: If you receive a message about unsellable parts, this means that at least one checked part is unsellable.*

3. The **Work Order/Invoice** tab opens. For more information about this tab, see the **Create Work Orders or Invoices (Work Order/Invoice Tab)** section of this guide.

Note: If you select an assembly part (e.g., a front door) and attempt to start a new work order, Sales Pro gives you the ability to select the specific component parts you wish to include in the sale. All of the component parts are checked by default. Click to uncheck the checkbox for any parts you wish to exclude from the work order, then click **Accept**.

The dialog box titled "FDR-R Assembly (stk# 160721)" displays a table of component parts. The table has columns for Part, Grade, Location, Description, Retail, and Wholesale. The parts listed are:

Part	Grade	Location	Description	Retail	Wholesale
Selling FDR-R	A	FTWCAR	(electric windows), NIQ,6D1,RH Japan	\$400.00	\$400.48
<input checked="" type="checkbox"/> FRG-R	A	FTWCAR	(electric), Japan built, RH ,FTWCAR	\$50.80	\$50.80
<input checked="" type="checkbox"/> DWM-R	A	FTWCAR	Front, RH ,FTWCAR	\$75.00	\$75.32
<input checked="" type="checkbox"/> FDW-R	A	FTWCAR	Japan built, RH ,FTWCAR	\$75.80	\$75.80

At the bottom of the dialog box, there are two buttons: **Accept** (with a green checkmark icon) and **Cancel** (with a red X icon).

* You can review your yard settings for unsellable parts in Checkmate Retro using the **Find and Sell display suppressions** function (Checkmate Full: **6,10,14**. Checkmate Classic: **S3,15**).

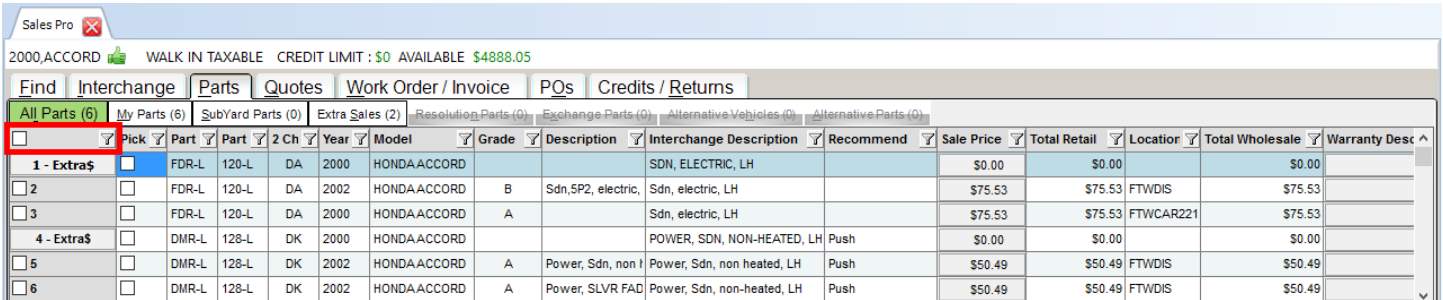
Additional Actions

From the **Parts** tab, you can also perform several other functions that are described in the following sections.

Select All Parts in Search Results

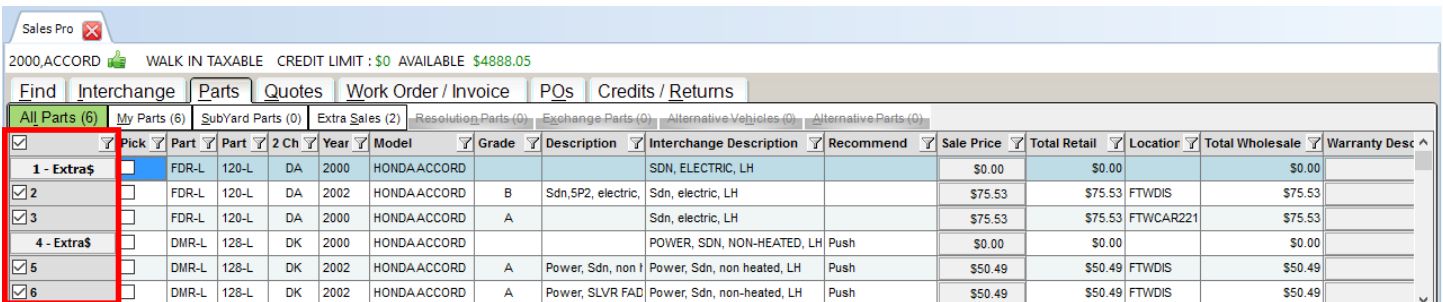
While viewing search results on the **Parts** tab, you can select all of the parts listed with just one click. To do this, follow these steps:

1. Check the checkbox in the top left corner of the grey, left-most column.



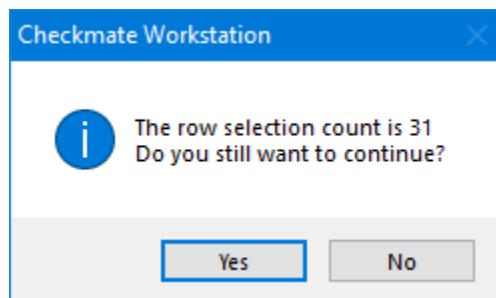
<input type="checkbox"/>	Pick	Part	Part	2 Ch	Year	Model	Grade	Description	Interchange Description	Recommend	Sale Price	Total Retail	Location	Total Wholesale	Warranty Desc
<input type="checkbox"/>	<input type="checkbox"/>	1 - Extra\$	FDR-L	120-L	DA	2000	HONDA ACCORD		SDN, ELECTRIC, LH		\$0.00	\$0.00		\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	2	FDR-L	120-L	DA	2002	HONDA ACCORD	B	Sdn,5P2, electric,	Sdn, electric, LH	\$75.53	\$75.53	FTWDIS	\$75.53	
<input type="checkbox"/>	<input type="checkbox"/>	3	FDR-L	120-L	DA	2000	HONDA ACCORD	A	Sdn, electric, LH		\$75.53	\$75.53	FTWCAR221	\$75.53	
<input type="checkbox"/>	<input type="checkbox"/>	4 - Extra\$	DMR-L	128-L	DK	2000	HONDA ACCORD		POWER, SDN, NON-HEATED, LH	Push	\$0.00	\$0.00		\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	5	DMR-L	128-L	DK	2002	HONDA ACCORD	A	Power, Sdn, non h	Power, Sdn, non heated, LH	\$50.49	\$50.49	FTWDIS	\$50.49	
<input type="checkbox"/>	<input type="checkbox"/>	6	DMR-L	128-L	DK	2002	HONDA ACCORD	A	Power, SLVR FAD	Power, Sdn, non-heated, LH	\$50.49	\$50.49	FTWDIS	\$50.49	

2. All of your inventoried parts in the results are now selected and you can perform an action on all parts.



<input checked="" type="checkbox"/>	Pick	Part	Part	2 Ch	Year	Model	Grade	Description	Interchange Description	Recommend	Sale Price	Total Retail	Location	Total Wholesale	Warranty Desc
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1 - Extra\$	FDR-L	120-L	DA	2000	HONDA ACCORD		SDN, ELECTRIC, LH		\$0.00	\$0.00		\$0.00	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	FDR-L	120-L	DA	2002	HONDA ACCORD	B	Sdn,5P2, electric,	Sdn, electric, LH	\$75.53	\$75.53	FTWDIS	\$75.53	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	FDR-L	120-L	DA	2000	HONDA ACCORD	A	Sdn, electric, LH		\$75.53	\$75.53	FTWCAR221	\$75.53	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4 - Extra\$	DMR-L	128-L	DK	2000	HONDA ACCORD		POWER, SDN, NON-HEATED, LH	Push	\$0.00	\$0.00		\$0.00	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	DMR-L	128-L	DK	2002	HONDA ACCORD	A	Power, Sdn, non h	Power, Sdn, non heated, LH	\$50.49	\$50.49	FTWDIS	\$50.49	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	6	DMR-L	128-L	DK	2002	HONDA ACCORD	A	Power, SLVR FAD	Power, Sdn, non-heated, LH	\$50.49	\$50.49	FTWDIS	\$50.49	

Note: If there are 20 or more parts in the results, Sales Pro will warn you if you check to select all of the parts. This allows you to confirm the action. Click **Yes** to continue and close this message.



Send Parts to Photomate

Photomate is a mobile app that helps you take your Imaging tasks out in the yard with you. Take photos with your phone or tablet, and wirelessly upload to Checkmate Imaging. (Learn more about Photomate at <http://products.car-part.com/photomate>)

To send parts to Photomate so photos can be taken, follow these steps:

1. From your search results on the **Parts** tab, use the checkbox column to select any part(s) that need images.
2. Then, click the **Photomate** button.

Part	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description		
1 - Extra\$	EN-L	2005	CAMRY	58928		\$0.00		LH		
<input type="checkbox"/>	2	EN-L	2005	CAMRY	C	58928	LH,gr,3K1,NIQ,FTW	\$105.00	0cc	LH
<input checked="" type="checkbox"/>	3	EN-L	2004	CAMRY	C	58928	LH,NIQ,2B2,SLVR,FTWCAR	\$105.00	0cc	LH
<input checked="" type="checkbox"/>	4	EN-L	2003	CAMRY	A	58928	LH,BLU PAINT CODE=8Q2,FTWCAR	\$105.00	0cc	LH
<input checked="" type="checkbox"/>	5	EN-L	2003	CAMRY	A	58928	LH,SP1,WHITE ,040,FTWCAR	\$105.00	1cc	LH
<input type="checkbox"/>	6	EN-L	2002	CAMRY	A	58928	TEST DO NOT SELL	\$105.00	0cc	LH
<input type="checkbox"/>	7	EN-L	2002	CAMRY	A	58928	LH,BLUE ,PAINT CODEis8Q0,FTWCAR	\$105.00	0cc	LH
8 - Extra\$	EN-R	2005	CAMRY	58927		\$0.00		RH		
<input checked="" type="checkbox"/>	9	EN-R	2004	CAMRY	C	58927	RH,NIQ,2B2,SLVR,FTWCAR	\$52.50	2cc	RH
<input checked="" type="checkbox"/>	10	EN-R	2003	CAMRY	A	58927	RH,MAR ,3Q3,FTWCAR	\$105.00	0cc	RH

Car-Part	Reques	Sales	Avg	NIS	Lost	QTY	Undamage	Retail	Wholesa	Export	Core	Date	List Pr
95	657	1917	0	0	\$0.00	0	0	4	\$0.00	\$105.00	\$100.26	\$0.00	02/07/200

Start New Quote Print Pick Slip Start New Work Order Photomate Part Tag Queue

3. The **Assign an employee** window opens. If desired, add an assignment or comment:
 - Select an **Employee** username to assign this part to a specific employee.
 - Type a **Task Comment** with specific instructions. This **Task Comment** is added to each part being sent to Photomate.

Assign an employee

Employee
FRANK

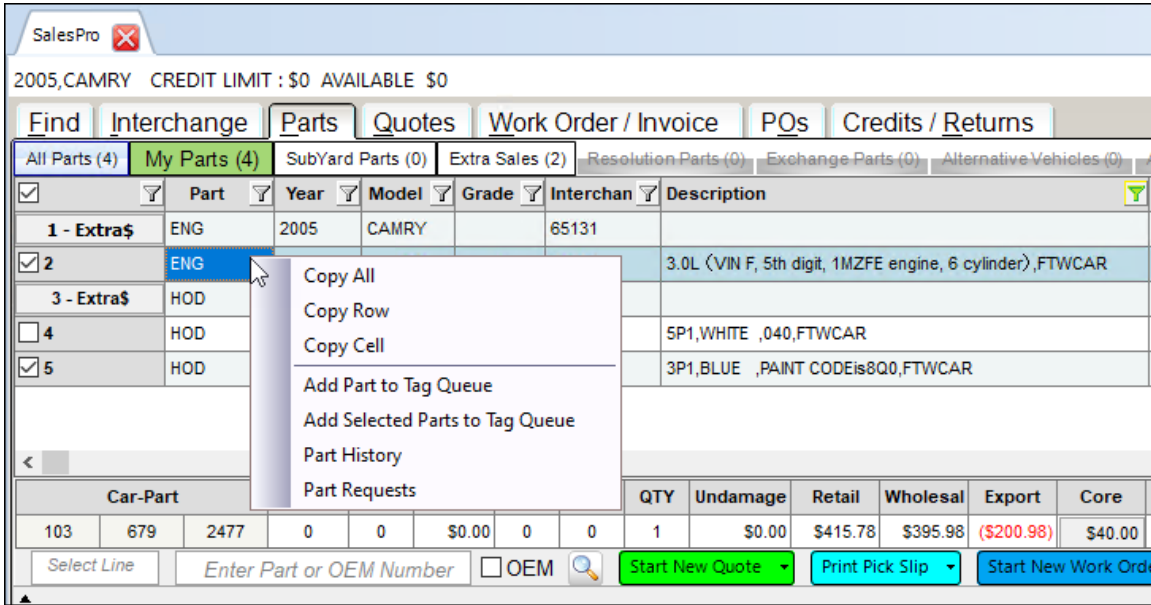
Task Comment
Take close-ups of any damage.

Accept Cancel

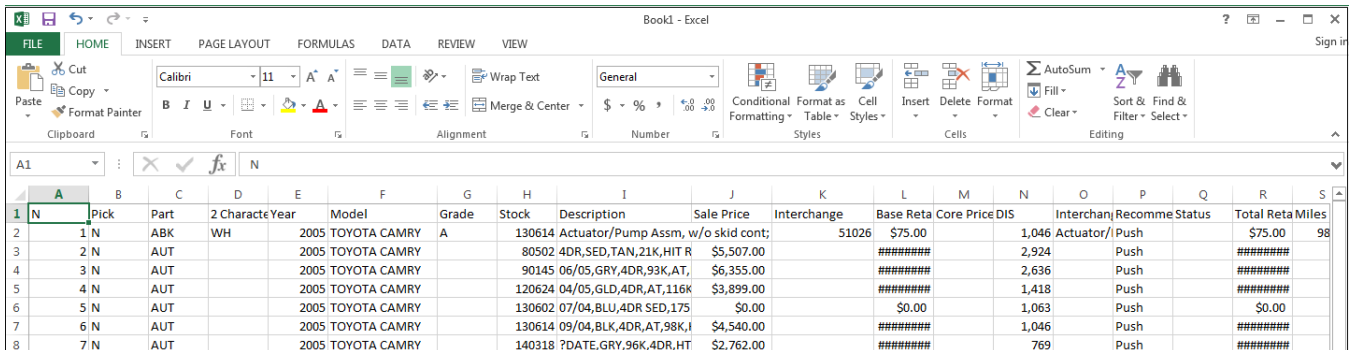
4. Click **Accept**. The part(s) you select will be sent to the Photomate application. For more information about using Photomate, see the Photomate User Guide.

Copy Information

Copy part information to the clipboard by highlighting a part, then right-clicking.

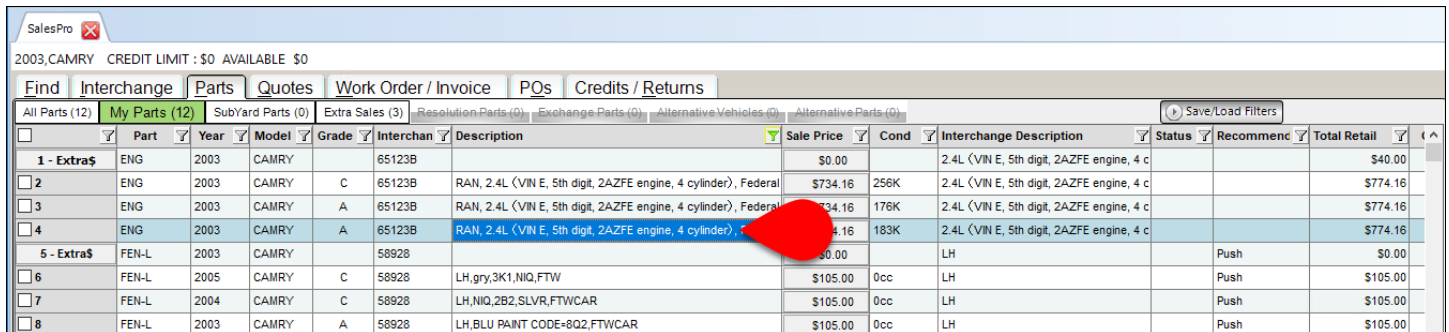


Select the appropriate option from the menu that appears, and then you can paste this information into a text editor or spreadsheet program (e.g., Microsoft Excel).



Trading Partners Search

Highlight a part and press your **Price** or **Buy F-key** to search Trading Partners for this part.



CrashLink Search

Highlight a part and press your designated CrashLink **F-key** to initiate a CrashLink search. In Checkmate, the default F-key is **F6**.

2003,CAMRY CREDIT LIMIT : \$0 AVAILABLE \$0

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

All Parts (12) My Parts (12) SubYard Parts (0) Extra Sales (3) Resolution Parts (0) Exchange Parts (0) Alternative Vehicles (0) Alternative Parts (0) Save/Load Filters

	Part	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description	Status	Recommenc	Total Retail
1 - Extra\$	ENG	2003	CAMRY		65123B		\$0.00		2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$40.00
2	ENG	2003	CAMRY	C	65123B	RAN, 2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder), Federal	\$734.16	256K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
3	ENG	2003	CAMRY	A	65123B	RAN, 2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder), Federal	\$734.16	176K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
4	ENG	2003	CAMRY	A	65123B	RAN, 2.4L (VIN E, 5th digit, 2AZFE engine, 4 cylinder), Federal	\$734.16	183K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
5 - Extra\$	FEN-L	2003	CAMRY		58928		\$0.00		LH		Push	\$0.00
6	FEN-L	2005	CAMRY	C	58928	LH,gry,3K1,NIQ,FTW	\$105.00	0cc	LH		Push	\$105.00
7	FEN-L	2004	CAMRY	C	58928	LH,NIQ,2B2,SLVR,FTWCAR	\$105.00	0cc	LH		Push	\$105.00
8	FEN-L	2003	CAMRY	A	58928	LH,BLU PAINT CODE=8Q2,FTWCAR	\$105.00	0cc	LH		Push	\$105.00
9	FEN-L	2003	CAMRY	A	58928	LH,5P1,WHITE ,040,FTWCAR	\$105.00	1cc	LH		Push	\$105.00
10	FEN-L	2002	CAMRY	A	58928	LH,BLUE ,PAINT CODE=8Q0,FTWCAR	\$105.00	0cc	LH		Push	\$105.00
11 - Extra\$	ALT	2003	CAMRY		60824		\$0.00		4 cylinder (80 amp)		Push	\$15.00
12	ALT	2003	CAMRY	A	60824	PLUG BROKE, 4 cylinder (80 amp),FTWCAR	\$37.07	176K	4 cylinder (80 amp)		Push	\$52.07
13	ALT	2003	CAMRY	A	60824	4 cylinder (80 amp),FTWCAR	\$37.07	133K	4 cylinder (80 amp)		Push	\$52.07

Car-Part Reques Sales Avg MIS Lost QTY Undamage Retail Wholesal Export Core Date List Price

578 3295 9731 1 0 \$0.00 0 1 2 \$0.00 \$734.16 \$699.20 (\$148.20) \$40.00 11/26/201 \$17,274.00

Select Line Enter Part or OEM Number OEM Start New Quote Print Pick Slip Start New Work Order Photomate Part Tag Queue Close

Note: Sales Pro also gives you the ability to perform CrashLink searches from the **Find** tab. With no other year/model/part information entered, follow these steps:

1. Check the **OEM** checkbox.
2. Enter the OEM number in the **Enter OEM #** field.
3. Press **Enter**.
4. Press your designated CrashLink **F-key** to initiate a CrashLink search.

Find Interchange Parts Quotes Work

Part and Vehicle Search

Enter customer information to search

Quick Search e.g., 98, MUSTANG, ENG, TRA

Enter VIN or Year


Enter Model

5380133120 OEM

FIND

Search for New Part

Search for a new part by entering the part code or OEM number in the **Enter Part or OEM Number** field, then pressing **Enter**. You can also search using the Quick Search method (e.g., 00, Camry, ENG,TRA). The search results for this new search will replace the parts that were previously listed on the screen.


SalesPro  2003,CAMRY CREDIT LIMIT : \$0 AVAILABLE \$0

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

All Parts (12) My Parts (12) SubYard Parts (0) Extra Sales (3) Resolution Parts (0) Exchange Parts (0) Alternative Vehicles (0) Alternative Parts (0) Save/Load Filters

<input type="checkbox"/>	Part	Year	Model	Grade	Interchan	Description	Sale Price	Cond	Interchange Description	Status	Recommenc	Total Retail
<input type="checkbox"/>	1 - Extra\$	ENG	2003	CAMRY		65123B	\$0.00		2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$40.00
<input type="checkbox"/>	2	ENG	2003	CAMRY	C	65123B	\$734.16	256K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
<input type="checkbox"/>	3	ENG	2003	CAMRY	A	65123B	\$734.16	176K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
<input type="checkbox"/>	4	ENG	2003	CAMRY	A	65123B	\$734.16	183K	2.4L (VIN E, 5th digit, 2AZFE engine, 4 c			\$774.16
<input type="checkbox"/>	5 - Extra\$	FEN-L	2003	CAMRY		58928	\$0.00		LH		Push	\$0.00
<input type="checkbox"/>	6	FEN-L	2005	CAMRY	C	58928	\$105.00	0cc	LH		Push	\$105.00
<input type="checkbox"/>	7	FEN-L	2004	CAMRY	C	58928	\$105.00	0cc	LH		Push	\$105.00
<input type="checkbox"/>	8	FEN-L	2003	CAMRY	A	58928	\$105.00	0cc	LH		Push	\$105.00
<input type="checkbox"/>	9	FEN-L	2003	CAMRY	A	58928	\$105.00	1cc	LH		Push	\$105.00
<input type="checkbox"/>	10	FEN-L	2002	CAMRY	A	58928	\$105.00	0cc	LH		Push	\$105.00
<input type="checkbox"/>	11 - Extra\$	ALT	2003	CAMRY		60824	\$0.00		4 cylinder (80 amp)		Push	\$15.00
<input type="checkbox"/>	12	ALT	2003	CAMRY	A	60824	\$37.07	176K	4 cylinder (80 amp),FTWCAR		Push	\$52.07
<input type="checkbox"/>	13	ALT	2003	CAMRY	A	60824	\$37.07	133K	4 cylinder (80 amp),FTWCAR		Push	\$52.07

<	Reques	Sales	Avg	MIS	Lost	QTY	Undamage	Retail	Wholesal	Export	Core	Date	List Price	Edit	Add	Remove	Vehicle	APP	History	
578	9731	1	0	\$0.00	0	1	2	\$0.00	\$734.16	\$699.20	(\$148.20)	\$40.00	11/26/201	\$17,274.00						

Select Line Enter Part or OEM Number OEM  Start New Quote Print Pick Slip Start New Work Order Photomate Part Tag Queue Close

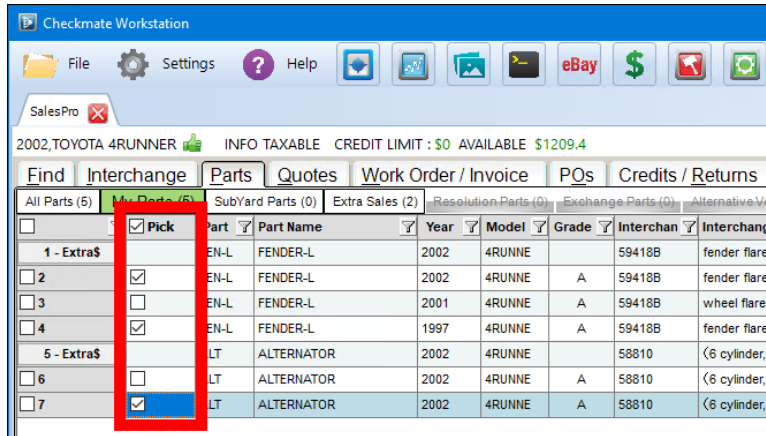
Print Pick Slip

To print a pick slip for parts in your inventory, follow these steps:

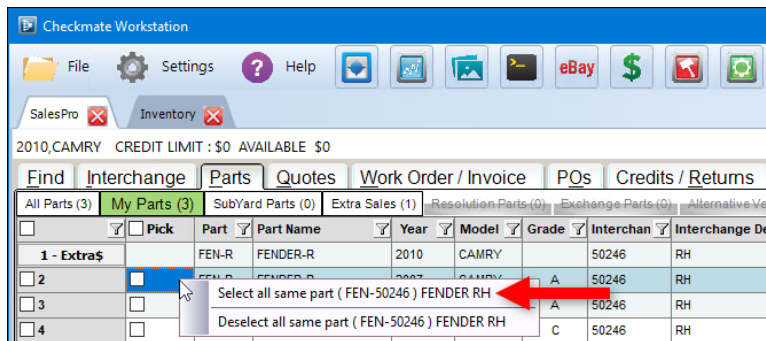
1. Determine which parts you want to print pick slips for. Options are:

- **Selected part(s) only** – Check the box in the **Pick** column for each part you want to print a pick slip for.

Note: If the **Pick** column is not displayed, right-click on the column headers and select **Pick** from the menu that appears.

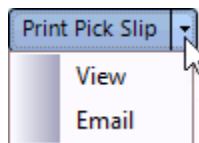


- **All same displayed parts** – To print pick slips for all the displayed parts that are the same, right-click on a checkbox in the **Pick** column and click the **Select all same part** option.
 - For interchange parts, this puts a check in the **Pick** box for all displayed parts that have the same interchange number as the part that was right-clicked (this does not include parts with non-exact interchange.)
 - For non-interchange parts, this puts a check in the **Pick** box for all displayed parts that have the same part code as the part that was right-clicked.

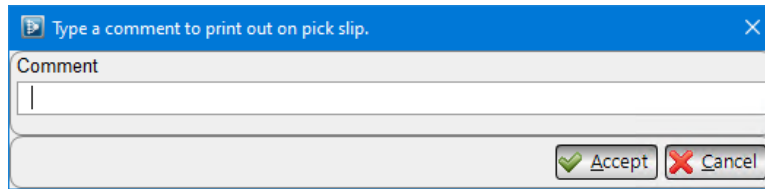



Print pick slips for all displayed parts – To print pick slips for all displayed parts, leave all boxes unchecked. When you click **Print Pick Slip**, each part on the screen will print on the pick slip.

- Click the down arrow on the **Print Pick Slip** button, to view or email a pick slip.



2. The **Type a comment to print out on pick slip** window opens. Enter a **Comment** (if applicable), then click **Accept** to print.

A screenshot of a software dialog box titled "Type a comment to print out on pick slip." The dialog box has a blue header bar with a close button (X) in the top right corner. Below the header is a text input field labeled "Comment" with a vertical cursor. At the bottom right of the dialog box, there are two buttons: "Accept" with a green checkmark icon and "Cancel" with a red X icon.

 **Note:** Sales Pro also gives you the ability to print pick slips from the **Work Order/Invoice** tab. For more information about this tab, see the **Create Work Orders or Invoices (Work Order/Invoice Tab)** section of this guide.

Look Up Pick Slips/Comments

You can look up pick slips in Sales Pro to see the parts and comments on the pick slip. To do so:

1. In the **Research** section of the **Find** tab, type the pick slip number in the **Enter Pick Slip #** field.

The screenshot shows the SalesPro interface with the 'Research' tab selected. The 'Enter Pick Slip #' field is highlighted with a red box, and a red arrow points to it from the right. The 'Stock Puller' field is also visible, containing the text 'Pickslip # : 984217'. Below the search fields, there is a list of parts with a table structure:

1	Barcode	Stock	Location	OK	Missing	Not as Described
	0000442947	190114	21CDIS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Year & Model: 10 VOLKSWAGEN CC						
ALTERNATOR						
Description : 2.0L, (140 amp), ID 06B903016AB??_FTWCAR						
Interchange: 60967 IC Description : 2.0L, (140 amp), ID 06B903016AB						
AUT VIN : WVVWML7AN6AE505539						
AUT Location : 21CDIS						
AUT Description : 06/09,AT,4DR,148K,GOLD LR7L,HT RR,FTW						

2. Press **Enter** on your keyboard. The parts on that pick slip display on the **Parts** tab. The pick slip information, including the pick slip comment, display in the bottom left corner on the **Pick Slip** tab.

The screenshot shows the SalesPro interface with the 'Parts' tab selected. A table of parts is displayed:

1	2	3	Part	Part Name	Year	Model	Grade	Interchan	Interchange Description	Status	Description	Sale P
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALT	ALTERNATOR	2010	VOLKCC	A	60967	2.0L, (140 amp), ID 06B903016AB		2.0L, (140 amp), ID 06B903016AB ? ?_FTWCAR	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALT	ALTERNATOR	2008	PASSAT	A	60967	140 amp, ID 06B903016AB		140 amp, ID 06B903016AB ? ?_FTWCAR	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALT	ALTERNATOR	2006	PASSAT	A	60967	140 amp, ID 06B903016AB		140 amp ? ? ID 06B903016AB,FTWCAR	

Below the table, there is a 'Pick Slip' tab in the bottom left corner, highlighted with a red box. It contains the following information:

Description Private Part Notes Pick Slip
Pick Slip # 984217
Total Parts # 3
Comment: Pick slip comment shows here.

Edit Part Information

To edit information about a part:

1. In your search results on the **Parts** tab, click to highlight the part.
2. Click the **Edit** button.

The screenshot shows the Sales Pro Inventory tool interface. At the top, there are tabs for 'Find', 'Interchange', 'Parts', 'Quotes', 'Work Order / Invoice', 'POs', and 'Credits / Returns'. The 'Parts' tab is active, displaying a table of parts. A red circle with a white arrow points to the 'CAMRY' model in the second row. Below the table, there is a 'Part - Edit' tab, which is also highlighted with a red circle and a white arrow. The 'Part - Edit' tab shows various fields for editing the part, including 'Car-Part', 'Reques', 'Sales', 'Avg', 'NIS', 'Lost', 'QTY', 'Undamage', 'Retail', 'Wholesale', 'Export', 'Core', 'Date', and 'List Price'. There are also buttons for 'Edit', 'Add', 'Remove', 'Vehicle', 'APP', and 'History'.

	Part	Year	Model	Interchan	Description	Sale Price	Interchange Description	Status	Recommend	Total Retail	Cat
1 - Extra\$	FEN-L	2005	CAMRY	58928		\$0.00	LH		Push	\$0.00	
2	FEN-L	2005	CAMRY	C	LH,gry,3K1,NIQ,FTW	\$105.00	LH		Push	\$105.00	Y 113
3	FEN-L	2004	CAMRY	C	LH,NIQ,2B2,SLVR,FTWCAR	\$105.00	LH		Push	\$105.00	Y 712
4	FEN-L	2003	CAMRY	A	LH,BLU PAINT CODE=8Q2,FTWCAR	\$105.00	LH		Push	\$105.00	W 176
5	FEN-L	2003	CAMRY	A	LH,SP1,WHITE ,040,FTWCAR	\$105.00	LH		Push	\$105.00	W 183
6	FEN-L	2002	CAMRY	A	TEST DO NOT SELL	\$105.00	LH		Push	\$105.00	
7	FEN-L	2002	CAMRY	A	LH,BLUE ,PAINT CODEis8Q0,FTWCAR	\$105.00	LH		Push	\$105.00	Y 180
8 - Extra\$	FEN-R	2005	CAMRY	58927		\$0.00	RH			\$0.00	
9	FEN-R	2004	CAMRY	C	RH,NIQ,2B2,SLVR,FTWCAR	\$52.50	RH			\$52.50	Y 712
10	FEN-R	2003	CAMRY	A	RH,MAR ,3Q3,FTWCAR	\$105.00	RH			\$105.00	W 256

3. The **Inventory** tool opens, displaying the **Part – Edit** tab. Use this screen to edit and save the part. For more information about this process, refer to the Checkmate Inventory User Guide.

Note: For information about bulk editing parts, refer to the Checkmate Inventory User Guide, which you can find at http://products.car-part.com/checkmate/training_inventory.html

Edit AUT

AUT records cannot be edited in Sales Pro, they are edited in the Checkmate Inventory tool. For more information about editing AUT records, refer to the **Editing a Vehicle** section of the Inventory User Guide , which you can find at http://products.car-part.com/checkmate/training_inventory.html

Remove/Delete Inventory

In Sales Pro, you can delete just one part at a time. Deleting multiple parts from inventory at a time is done in the Inventory tool.

To remove a part from inventory in Sales Pro, follow these steps:

1. In search results on the **Parts** tab, check the box in the checkbox column to select the part you want to remove from inventory.
2. Click **Remove**.

WALK IN TAXABLE 859-344-1925 CREDIT LIMIT : \$1000 AVAILABLE \$1010

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Part	Part Name	Year	Model	Grade	Description	Status	Interchange	Cat	Interchange Description	Review	Recommend	Sale Price	DIS	
<input type="checkbox"/>	7	ASH-R	AXLE SHAFT-R	2007	MAZCX7	A	Front Axle, outer assembly, RH,FTWCAR	50353A	W	Front Axle, outer assembly, RH	No		\$53.00	654
<input type="checkbox"/>	8	AUT	AUTOMOBILE	2007	MAZCX7		10/06,SUV,AT,100K,PAINT CODE+32V MAR,BAD ENG,I		D		No		\$1,983.00	654
<input type="checkbox"/>	9	BAG	AIR BAG	2007	MAZCX7	A	driver, roof,FTWCAR	59278	W	driver, roof	No	Push	\$78.00	654
<input checked="" type="checkbox"/>	10	BAG	AIR BAG	2007	MAZCX7	A	driver, wheel,FTWCAR	59276	W	driver, wheel	No	Push	\$68.00	654
<input type="checkbox"/>	11	BAG	AIR BAG	2007	MAZCX7	A	passenger, BLK,dash,FTWCAR	59277	W	passenger, dash	No	Push	\$78.00	654
<input type="checkbox"/>	12	CAL-L	CALIPER-L	2007	MAZCX7	A	Front, LH,FTWCAR	50301	W	Front, LH	No		\$53.00	654
<input type="checkbox"/>	13	CAL-R	CALIPER-R	2007	MAZCX7	A	Front, RH,FTWCAR	50300	W	Front, RH	No		\$53.00	654

Car-Part Local-Region-Global Requests Sales Avg NIS Lost QTY Undamaged Retail Wholesale Export Core Date List Price

1 16 46 0 0 \$0.00 0 0 2 \$0.00 \$68.00 \$65.00 \$0.00 01/23/2008 \$903.00

Select Line Enter Part or OEM Number OEM Start New Quote Print Pick Slip Start New Work Order Photomate Part Tag Queue Remove Vehicle APP History

3. A window displays for you to specify the **Reason for removal**. Type the reason and click **Accept**.

Delete BAG STK#190511 07 MAZDA CX7

Reason for removal BAG IS BLOWN

Accept Cancel

4. A message displays asking for confirmation. If you're sure, click **Yes**. The part is removed from your inventory

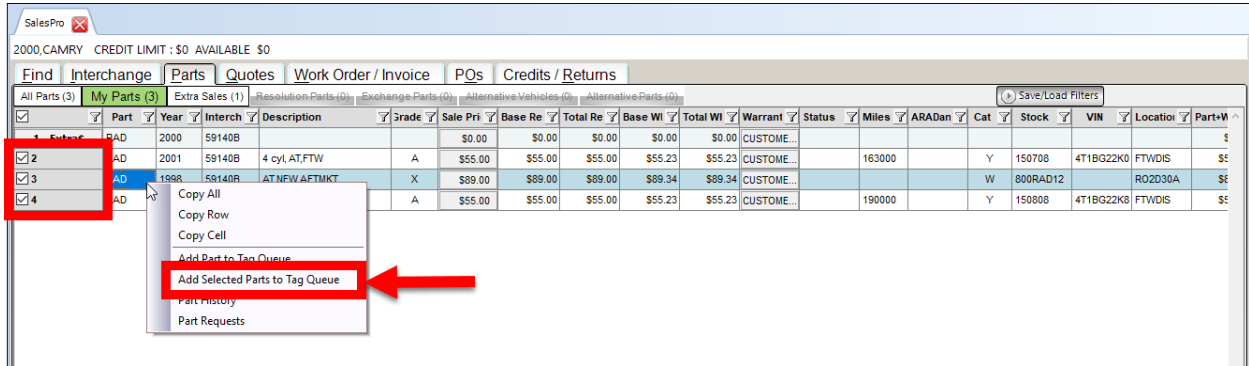
Warning! Do not delete parts unless you are absolutely sure. Deleting inventory cannot be undone!

For more information about deleting multiple parts at one time, refer to the Inventory User Guide, which you can find at http://products.car-part.com/checkmate/training_inventory.html

Add Part Tags to Queue and Print Part Tags

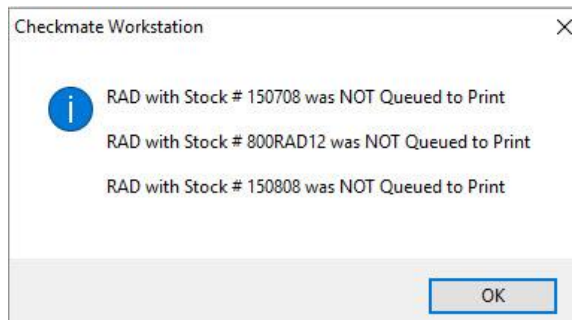
Sales Pro allows you to print all part tags that are currently in Checkmate's three-part tag file. To use this feature, follow these steps:

1. From the search results on the **Parts** tab, click the checkboxes to select the part(s) you wish to print tags for.
2. Right-click on any part. From the menu that appears, select **Add Selected Parts to Tag Queue**.

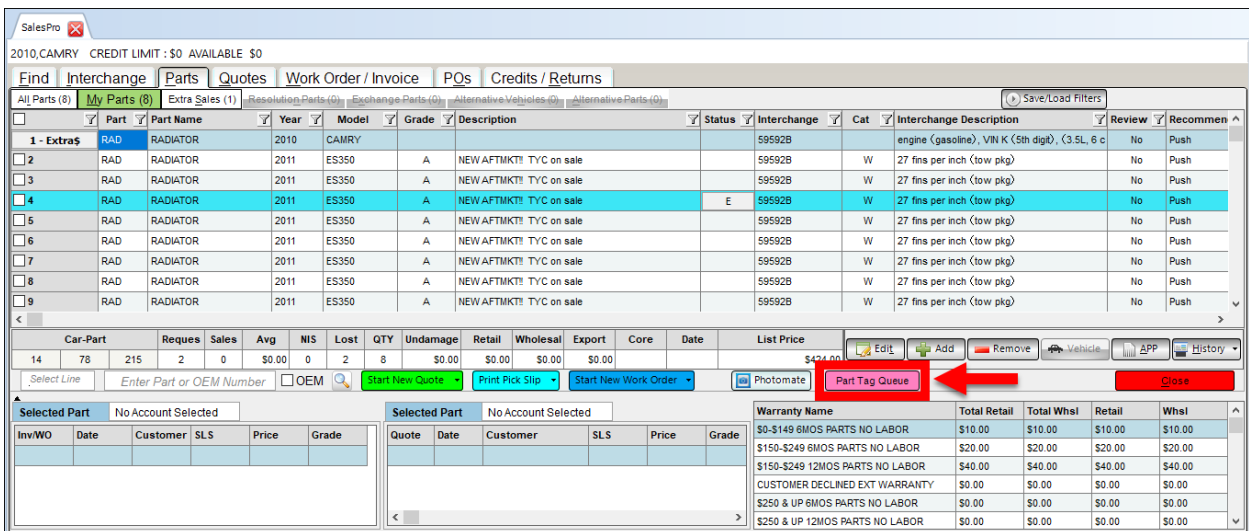


3. Sales Pro confirms that the part(s) have been added to the **Part Tag Queue**. Click **OK** to return to the search results.

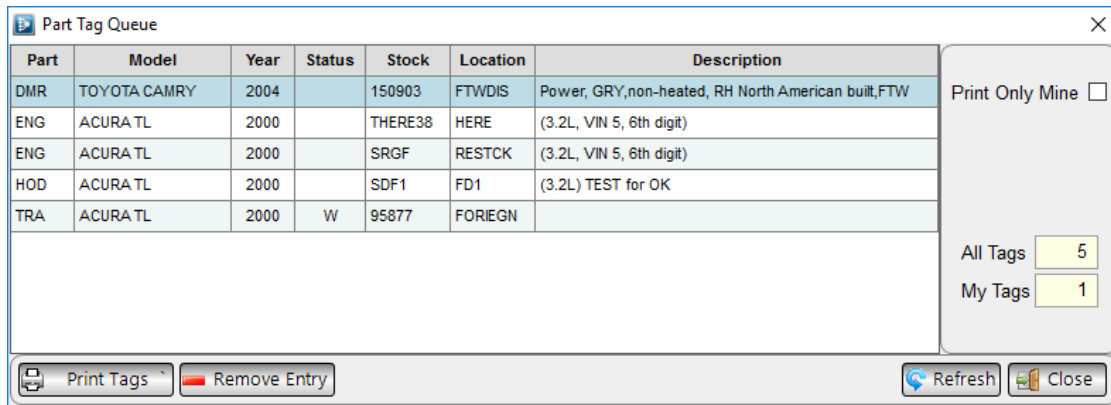
Note: If the selected part(s) have already been queued (perhaps by another employee), you will receive a notification that it was not queued to print. Click **OK** to close the window.



4. After you have added parts to the queue, click the **Part Tag Queue** button.



5. The **Part Tag Queue** window opens.



- **All Tags** indicates the total number of parts in the queue.
- **My Tags** indicates how many parts *you* have added to the queue.

Select from the following options:

- Check the **Print Only Mine** checkbox to display the parts *you* added to the queue.
 - **Remove Entry** deletes the highlighted part from the queue.
 - **Refresh** refreshes the queue.
6. When you are satisfied with your list, click **Print Tags** to print the tags, or click **Close** to close this window.

Apply a Warranty

Click the **Warranty Description** or **Warranty Price** button. For more information, refer to **Appendix B: Pop-Up Windows**.

Edit the Sale Price

Click the **Sale Price** button. For more information, refer to **Appendix B: Pop-Up Windows**.

Add/Edit a Core

Click the **Core Price** or **Core Status** button. For more information, refer to **Appendix B: Pop-Up Windows**.

Add a Pallet Charge

Click the **Pallet Description** button. For more information, refer to **Appendix B: Pop-Up Windows**.

Add/Edit Freight

Click the **Freight Description** button. For more information, refer to **Appendix B: Pop-Up Windows**.

Quote Parts (Quotes Tab)

The **Quotes** tab is where you edit and print quotes for customers. You also use this tab when a customer is ready to buy parts off a quote.

To start a new quote, follow these steps:

1. From your search results on the **Parts** tab, check the part(s) you want to add to the quote (if you added Extra\$ or Exchange\$ parts, these will also be included).
2. Click the **Start New Quote** button.
3. The **Quotes** tab opens.

Inventory SalesPro

2005,TOYOTA COROLLA (ALSO SEE FX 87-88) JOHN CUSTOMER 444-444-4404 CREDIT LIMIT : \$1000 AVAILABLE \$1000

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Information JOHN CUSTOMER Ship To JOHN CUSTOMER Quote 999-47982 Status Active

789 FIXERUP BLVD PARTSTOWN, KY 41017 444-444-4404

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Tax %
				K E L L Y	02/01/2021	02/01/2021	02/06/2021	05/02/2021	6

	Sell	Part	Year	Model	Description	Total Price	Sale Price	Tax	Total Ret	Total Who	Warranty Descrip	Stock	Location	Interchange	Department	Interchange Desc	PO Acco	PO Name
1 - Remove	<input checked="" type="checkbox"/>	HLP-RH	2005	COROLL	RH AFTMKT? NSF...	\$105.00	\$105.00	Yes	\$105.00	\$100.36	CUSTOMER DECLI...	TYC19A	R08C40F	58982D		RH, S (smoked lens		
2 - Remove	<input checked="" type="checkbox"/>	FEN-RH	2003	COROLL	RH, ground effect...	\$89.25	\$89.25	Yes	\$89.25	\$85.10	CUSTOMER DECLI...	190813	16A-3	58983A		RH, ground effects		

Parts \$194.25
Warranty \$0.00
Cores \$0.00
Freight \$0.00 Tax Freight No
Est. Tax \$11.66
Total \$205.91
Payment

Selected Part JOHN CUSTOMER

Quote	Date	Customer	SLS	Price	Grade
47982	02/01/21	JOHN	KELL	\$105.00	X
47982	02/01/21	JOHN	KELL	\$89.25	A

Quote Note Part Note Private Part Note Images

Fast Notes

Copy notes to WO

Promote All to WO Print Quote Save Close


4. Edit quote information as needed, then click **Save** to save the quote.

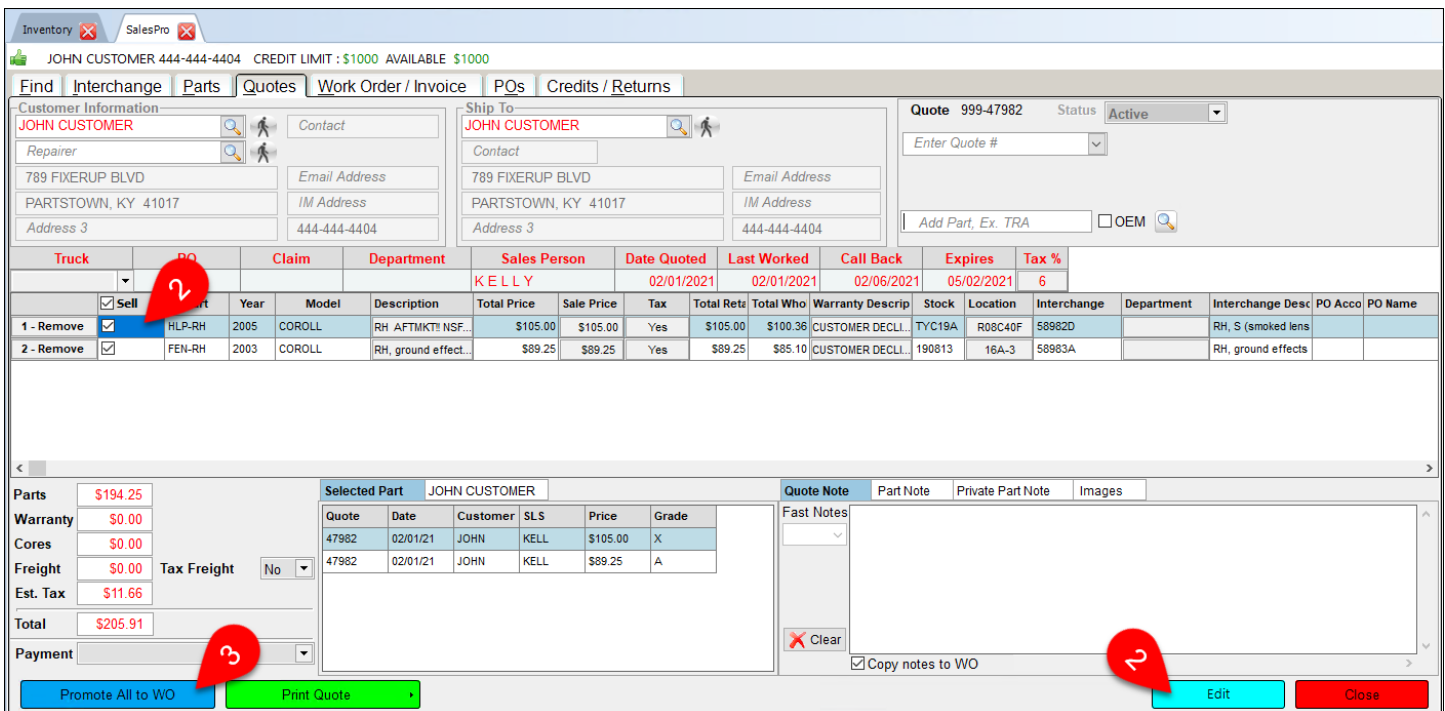
Note: Quotes created in Checkmate Sales Pro cannot be edited or promoted in Checkmate Retro.

5. Click the **Print Quote** button to print. Click the arrow to **Email and Print** the quote or **Email Only**.

To sell parts off of a quote, follow these steps to create a work order:

1. Find and open the quote using one of the following methods:
 - Look up the quote from the **Find** tab's **Research** section.
 - Double-click the quote from the **Find** tab's **Recent Activity** section.
 - Click directly on the **Quotes** tab, and then use the **Enter Quote #** field to locate the quote you want to work with. Click the down arrow to perform an advanced search. See the **Advanced Search for an Item** section of this document for more information about advanced searches.
2. The quote displays on the **Quotes** tab.
 - If necessary, click **Edit** to make changes to the quote (refer to the **Editing Quotes** section below).
 - Use the **Sell** checkboxes to check the parts you want to sell.

 **Note:** If you open a quote that was created in Checkmate Retro, you must click **Edit** to promote the quote to a work order. Tax amounts will be calculated and added to the quote.



Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Tax %
				K E L L Y	02/01/2021	02/01/2021	02/06/2021	05/02/2021	6

Item	Description	Total Price	Sale Price	Tax	Total Retz	Total Who	Warranty Descrip	Stock	Location	Interchange	Department	Interchange Desc	PO Acco	PO Name
1 - Remove	RH AFTMKT! NSF...	\$105.00	\$105.00	Yes	\$105.00	\$100.36	CUSTOMER DECLI...	TYC19A	R08C40F	S8982D		RH, S (smoked lens		
2 - Remove	RH, ground effect...	\$89.25	\$89.25	Yes	\$89.25	\$85.10	CUSTOMER DECLI...	190813	16A-3	S8983A		RH, ground effects		

Parts \$194.25
Warranty \$0.00
Cores \$0.00
Freight \$0.00
Est. Tax \$11.66
Total \$205.91

Quote	Date	Customer	SLS	Price	Grade
47982	02/01/21	JOHN	KELL	\$105.00	X
47982	02/01/21	JOHN	KELL	\$89.25	A

3. Click **Promote All to WO** or **Promote Selected to WO** at the bottom of the screen.

Customize Display

On the **Quotes** tab, you can customize your display by:

- Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.
- Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).
- Using the horizontal scroll bar to see all the available information for each part (some users find it convenient to use wide-screen monitors with Checkmate Sales Pro, but it is not necessary).

Inventory SalesPro
JOHN CUSTOMER 444-444-4404 CREDIT LIMIT : \$1000 AVAILABLE \$1000

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Information
JOHN CUSTOMER
Repairer
789 FIXERUP BLVD
PARTSTOWN, KY 41017
Address 3 444-444-4404

Ship To
JOHN CUSTOMER
Contact
789 FIXERUP BLVD
PARTSTOWN, KY 41017
Address 3 444-444-4404

Quote 999-47982 Status Active

Truck	PO	Claim	Payment	Sales	Date Quoted	Last Worked	Call Back	Expires	Tax %
				K E L L Y	02/01/2021	02/01/2021	02/06/2021	05/02/2021	6

	✓ Sell	Part	Year	Model	Description	Total Price	Sale Price	Tax	Total Retz	Total Who	Warranty Descrip	Stock	Location	Interchange	Department	Interchange Desc	PO Acco	PO Name
1 - Remove	✓	HLP-RH	2005	COROLL	RH AFTMKTT NSF...	\$105.00	\$105.00	Yes	\$105.00	\$100.36	CUSTOMER DECLI...	TYC19A	R08C40F	58982D		RH, S (smoked lens		
2 - Remove	✓	FEN-RH	2003	COROLL	RH, ground effect...	\$89.25	\$89.25	Yes	\$89.25	\$85.10	CUSTOMER DECLI...	190813	16A-3	58983A		RH, ground effects		

Parts \$194.25
Warranty \$0.00
Cores \$0.00
Freight \$0.00 Tax Freight No
Est. Tax \$11.66
Total \$205.91
Payment

Selected Part JOHN CUSTOMER

Quote	Date	Customer	SLS	Price	Grade
47982	02/01/21	JOHN	KELL	\$105.00	X
47982	02/01/21	JOHN	KELL	\$89.25	A

Quote Note Part Note Private Part Note Images

Fast Notes


Clear

Copy notes to WO

Promote All to WO Print Quote Save Close

Editing Quotes

On the **Quotes** tab, you can take the following actions to edit information on the quote (click the **Edit** button if necessary):

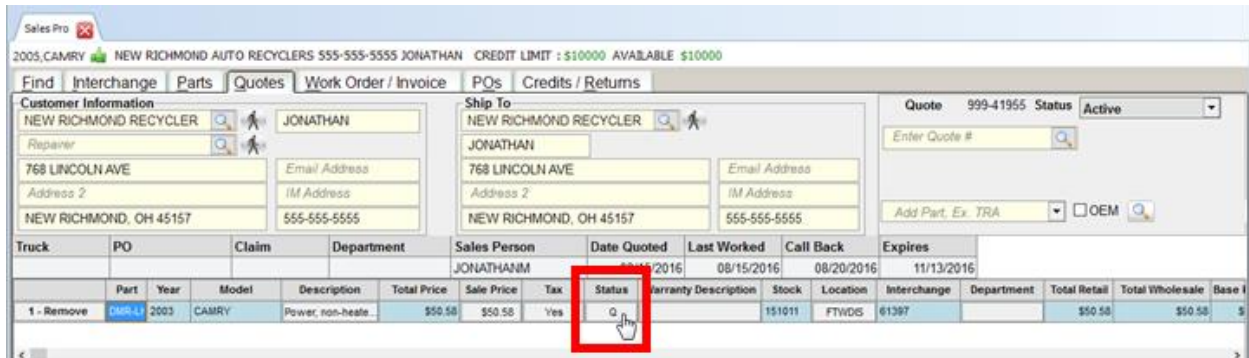
- Add or edit **Customer Information**. If the customer is a walk-in customer who does not need an account, click the **Walk-in** button ().
- Add shipping information in the **Ship To** fields.
- Edit the quote **Status**
- Use the **Add Part** field to add another part to the quote.
- Edit the **Truck, PO, Claim, Department, Discount %, and Tax %** fields, if applicable.
 - **Truck** – Truck that is delivering the part
 - **PO** – Buyer's PO number
 - **Claim** – Insurance claim number
 - **Department** – Department that is buying the part
 - **Discount %** – Percentage off that is being applied to the part(s) on the quote that have **Discount** set to **Yes**
 - **Tax %** – Tax being charged
- Edit the part's **Description, Location**, and whether or not **Tax** should be applied.
- Edit the part's **Sale Price, Warranty Description, Department, and Pallet Description**. (Refer to **Appendix B: Pop-Up Windows** for more information about these functions.)
- Right-click on a part to:
 - **Copy** part information
 - **View/Open Work Order** (if the part has already been promoted to a work order)
 - **Print Pick Slip**
 - View **Part History**
 - View interchange **Application Notes**
 - **Change Part** – This opens the **Parts** tab, displaying parts that have the same interchange number as the part you're changing (or the same year and model if the part has no interchange). Click to select a part and then click **Add to Open Quote** to finish changing the part.
- Edit the **PO Account** for brokered Extra Sales and Exchange Sales.
- Add or edit core information by clicking the **Core, Core Amt, or Core Tax** fields. (Refer to **Appendix B: Pop-Up Windows** for more information.)
- Click **Remove** to remove a part from the quote. On the **Remove Part** popup:
 - Click **Accept** to remove the part from the quote.
 - Or click **Change Part** to swap the part out for a different part (see **Change Part** bullet above).
- Click to highlight a part and press your **Price** or **Buy F-key** to do a Trading Partners search.
- Select the **Payment** method.

- Attach notes.
 - Enter a **Quote Note**. This will print on the quote. To transfer **Quote Notes** to the work order, leave the **Copy notes to WO** box checked.
 - Enter a **Part Note**. This will print with the highlighted part on the quote.
 - If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the quote.
 - Attach a **Private Part Note** to a part. If there is a part on the quote that already has a private note, this tab will be red. Private notes are available to your team in your software, but they aren't visible to your customers in online part listings or on printed quotes/work orders/invoices.
- View/email **Images** for the selected part. If there are no images for the part, images from the AUT display instead.
 - Double-click an image to open the **Image Viewer** window. Use the options on this window to zoom in/out, expand the image to fit the window, email, or print the image.
 - Click the camera button to assign the part to Photomate for photos. The part must be in inventory (i.e., not an extra sale).

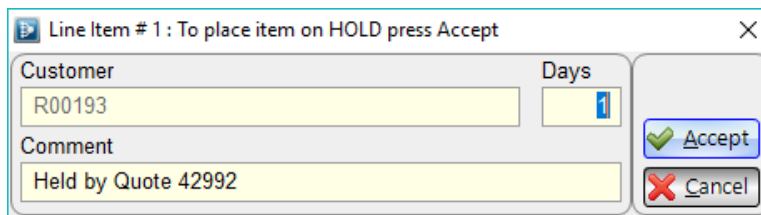
Put Parts on Hold

Sales Pro gives you the ability to put parts on hold if you plan to sell them to a customer at a later date. To use this feature, follow these steps:

1. Create a quote that includes the part(s) you would like to hold.
2. On the **Quotes** tab, click to edit the **Status** for the appropriate part.

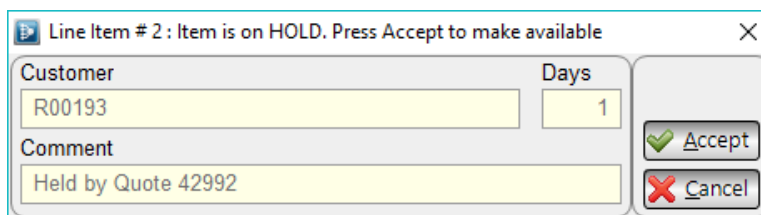


3. The **Line Item** window opens. This window includes three text fields:
 - **Name** – User logged into Checkmate
 - **Days** – Number of days the part should be on hold
 - **Comment** – Allows you to add a comment.
4. Edit the information in this window, then click **Accept** to put this part on hold.



Note: These parts will remain on hold until the number of days you specify have passed, or until you manually change the availability.

Parts on hold will still appear in search results on the **Parts** tab. If you select a part from the search results that is on hold, the **Line Item** window opens. This lets you know that the part is on hold. Click **Cancel** to close this window and return to the search results. You may also remove this part from hold and make the part available for sale by clicking **Accept**.



Create Work Orders or Invoices (Work Order/Invoice Tab)

This tab displays a work order or invoice and is used to promote work orders to invoices. When an order is in the work order stage, it is able to be edited. When it is in the invoice stage, it cannot be edited.

To create a work order and promote it to an invoice:

1. Select the parts you want to sell, either from your search results or from a quote:
 - **Parts tab** – Use the checkbox(es) to select the part(s), then click **Start New Work Order**.

Find Interchange Parts Quotes				
All Parts (4)	My Parts (4)	SubYard Parts (0)		
<input type="checkbox"/>	Part	Year	Model	
<input checked="" type="checkbox"/>	1 - Extra\$ FEN-L	2010	CAMRY	
<input checked="" type="checkbox"/>	2	2010	CAMRY	
<input checked="" type="checkbox"/>	3 - Extra\$ FEN-R	2010	CAMRY	
<input checked="" type="checkbox"/>	4	2007	CAMRY	
<input type="checkbox"/>	5	2007	CAMRY	
<input type="checkbox"/>	6	2007	CAMRY	

- **Quotes tab** – Use the checkbox(es) to select the part(s), then click **Promote All/Selected to WO**.

	<input checked="" type="checkbox"/>	Sell	Part	Year	Model
1 - Remove	<input checked="" type="checkbox"/>				AUDIA4
2 - Remove	<input checked="" type="checkbox"/>				AUDIA4
EPA - Remove			EPA		

2. The work order displays on the **Work Order/Invoice** tab. Edit the work order information as necessary.

The screenshot shows the 'Work Order/Invoice' tab in the SalesPro software. The interface is divided into several sections:

- Customer Information:** Customer Bill To (JANE CUSTOMER) and Customer Ship To (JANE CUSTOMER) with contact details like address and phone.
- Work Order Details:** Work Order # 999-501770, dated 09/17/2019.
- Parts Table:** A table listing parts with columns for Year, Part, Model, Description, Total Price, Sale Price, Discounted, Tax, Total Retail, Total Whol, Warranty Description, Stock, Location, Interchange, Department, Interchang, Cost, and Cat. A red circle highlights the 'Part' column.
- Payments Table:** A table with columns for Pmt #, Method of Payment, and Amt Paid. It shows a payment of \$0.00.
- Selected Part Table:** A table with columns for WO, Date, Customer, SLS, Price, and Grade. It lists two parts: 501770 and 501710.
- Notes Section:** A text area containing the note 'EXTENDED WARRANTY DECLINED BY CUSTOMER'.
- Summary and Actions:** A summary of parts, warranty, cores, freight, tax, and total amounts. At the bottom, there are buttons for 'Save and Print Work Order', 'Print/Promote to Invoice', 'Print Label', 'Work Order History', 'Save', and 'Close'.

3. Enter payment information.
4. Click **Print/Promote to Invoice** complete the sale.

You can also look up and open existing work orders and invoices from either the **Find** tab or the **Work Order/Invoice** tab:

- **Find** tab:
 1. Look up a work order or invoice in the **Research** section.
 2. Double-click a work order or invoice in the **Recent Activity** section.
- **Work Order/Invoice** tab:
 1. Click directly on the **Work Order / Invoice** tab.
 2. Use the **Enter Work Order #** or **Enter Invoice #** fields to locate the work order/invoice you want to work with.

For either of these fields, you can click the down arrow to perform an advanced search. See the **Advanced Search for an Item** section of this document for more about advanced searches.

Customize Display

On the **Work Order/Invoice** tab, you can customize your display by:

- Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.
- Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).
- Using the horizontal scroll bar to see all the available information for each part (some users find it convenient to use wide-screen monitors with Checkmate Sales Pro, but it is not necessary).

2005,AUDI A4 JOHN CUSTOMER 555-555-5555 CREDIT LIMIT : \$2000 AVAILABLE \$2000

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Bill To: JOHN CUSTOMER
 Contact: 123 FIXERUP RD., ANYTOWN, KY 41017, Address 3, 555-555-5555
 Email Address, IM Address

Customer Ship To: JOHN CUSTOMER
 Contact: 123 FIXERUP RD., ANYTOWN, KY 41017, Address 3, 555-555-5555
 Email Address, IM Address

Work Order: 999-501814 09/30/2019
 Enter Work Order #, Enter Invoice #, Add Part, Ex. TRA, OEM

Order Date	Ship Date	Due Date	Ordering	Customer PO	Discontinued	Core	R/O #	Truck	Sales Person	Discount %	Tax %
09/30/2019	09/30/2019	09/30/2019							FRANK		7

Year	Part	Model	Description	Total Price	Sale Price	Discounted	Tax	Total Retail	Total Whol	Warranty Description	Stock	Location	Interchange	Department	Interchange	Cost	Frei
1 - Remove	2002	FEN-LH	AUDIA4	AUDIA4 05 Int.58962 model...	\$135.00	\$125.00	Yes	Yes	\$135.00	\$135.87	\$0-\$149 6MOS PARTS...	141037	FTWDIS	58962	USED PART...	model VIN E	\$0.00
2 - Remove	2003	HLP-LH	AUDIA4	AUDIA4 05 Int.58942 exc. C...	\$65.54	\$55.54	Yes	Yes	\$65.54	\$65.54	\$0-\$149 6MOS PARTS...	140822	FTWCAR	58942	USED PART...	exc. Conv; v	\$0.00
3 - Remove	2002	HOD	AUDIA4	AUDIA4 05 Int.58625 model...	\$185.00	\$175.00	Yes	Yes	\$185.00	\$185.87	\$0-\$149 6MOS PARTS...	141037	FTWDIS	58625	USED PART...	model VIN E	\$0.00
EPA - Remove		EPA			\$3.00	\$3.00	No	No	\$0.00	\$0.00					USED PART...		\$0.00

Parts: \$378.54
 Warranty: \$30.00
 Cores: \$0.00
 Freight: \$0.00 Tax Freight: Yes
 Tax: \$26.99
 Total: \$415.53 Remaining: \$415.53
 Amt Paid: \$0.00 Deposited: \$0.00

Payments: Pmt # 1 Method of Payment Charge Amt Paid \$0.00


Selected Part: JOHN CUSTOMER
 WO: 501814 Date: 09/30/19 Customer: JOHN SLS: FRANK Price: \$125.00 Grade: A

Private Part Note, Order Tracker, WO/Invoice Note, Part Note, Fast Notes

Save and Print Work Order, Print/Promote to Invoice, Print Label, Work Order History, Save, Close

Editing Work Orders

If the order is in work order status, you can take the following actions (click the **Edit** button if necessary):

- Add or edit **Customer Bill To** information. If the customer is a walk-in customer who does not need an account, click the **Walk-in** button ().
- Add shipping information in the **Customer Ship To** fields.
- View the work order number and status.
- Use the **Add Part** field to add another part to the work order.
- Add information to the **Ordering, Customer PO, Dismantler, R/O#, Truck, Discount %, and Tax %** fields, if applicable.
 - **Ordering** – Department that is buying the part
 - **Customer PO** – Buyer's PO number
 - **Dismantler** – Name of the employee who will dismantle the vehicle
 - **Core** – Core status
 - **R/O#** – Insurance claim number
 - **Truck** – Truck delivering the part
 - **Discount %** – Discount amount that is being applied
 - **Tax %** – Tax applied
- Edit the **Ship Date** and **Due Date**
- Edit the **Sales Person**
- Edit the part's **Description, Location**, and whether or not **Tax** should be applied.
- Edit the part's **Sale Price, Warranty Description, Department**, and **Pallet Description**. (Refer to **Appendix B: Pop-Up Windows** for more information about these functions.)
- Right-click on a part to:
 - **Copy** part information
 - **Print Pick Slip**
 - **Print Shipping Labels**
 - **Print Return Label**
- **Remove** a part from the work order and then add a replacement part. See the **Changing Parts on Work Orders** section of this guide for more information about this feature.
- Select the **Payment** method.
 - You may be prompted to record additional information relevant to this payment method, such as a check number, email address, etc. This information will be recorded in the work order history.

- Include/edit notes: **WO/Invoice Note, Part Note, Private Part Note, and Order Trakker Notes.**
 - Order Trakker notes come from the **Manual Entry** column in Order Trakker. If you edit the note in Sales Pro, the note automatically updates in Order Trakker.
 - If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the work order/invoice.
 - **WO/Invoice Notes, Part Notes, and Order Trakker** notes will be included on the work order/invoice.
 - If there is a part on the work order/invoice that already has a private note, the **Private Part Notes** tab will be red. Private notes are available to your team in your software, but they aren't visible to your customers in online part listings or on printed quotes/work orders/invoices.

When you are finished making changes, click **Save** to make the changes. Then, you can:

- Save and print by clicking the **Save and Print Work Order** button. Click the arrow to **Print Work Order, Email Work Order, or View Work Order.**
 - If you see an option to **Print Standard Work Order**, this means that you are configured to use production work orders. Refer to the **Production Work Orders** section of this document for more information.
- Create and print the invoice by clicking the **Print/Promote to Invoice**. Click the arrow to **Post Invoice, Promote to Invoice, Print Invoice and Email, Email Invoice, View Invoice, or Print WO or Invoice.**
- Print shipping or return labels by right-clicking on a part, and selecting **Print Shipping Label, Print All Shipping Labels, or Print Return Label**. You can also print a shipping label for a single part by highlighting it and clicking the **Print Label** button.
- Click the **Work Order History** button to open the **Work Order History** window, where you can view the edit and print history for the work order.

The screenshot shows a window titled "Work Order History" with two tabs: "History of Changes" (selected) and "Print History". The table below lists the changes made to the work order.

WO Item	Edit Date	Edit Time	Field	Old Value	New Value	Comment	Employee
	08/16/2018	5:36:46 AM	Billing account		R00942		KELLY
	08/16/2018	5:36:46 AM	Date ordered		08/16/18		KELLY
	08/16/2018	5:36:46 AM	Sales person		KELLY		KELLY
	08/16/2018	5:36:46 AM	Ship date		08/16/18		KELLY
	08/16/2018	5:36:46 AM	User ID		135		KELLY
	08/16/2018	5:36:46 AM	Tax on freight		No		KELLY
	08/16/2018	5:36:46 AM	Bill to name		DWIGHT		KELLY
	08/16/2018	5:36:46 AM	Billing address line 1		123 BEET DR		KELLY
	08/16/2018	5:36:46 AM	Billing address line 2		SCRANTON, PA		KELLY
	08/16/2018	5:36:46 AM	Ship to name		DWIGHT		KELLY

At the bottom of the window, the following information is displayed:

Work Order: 999-124815 Creation Date: 08/16/2018 # of Changes: 66 [Close]

Production Work Orders

Production work orders are work orders that include a list of alternative parts. This is useful in cases where the originally requested part is damaged or otherwise undesirable. Alternative parts will only display on the work order. They will not appear on the invoice.

If you use production work orders, you also have the option to **Print Standard Work Order** (i.e., a work order that does not list alternative parts). To do this, click **Save and Print Work Order>Print Standard Work Order**. (This option is only available if the work order has not yet been promoted to an invoice.)

Parts				Payments		
Parts	\$133.00			Pmt #	Method of Payment	Amt Paid
Warranty	\$0.00	Tax Authority		1	Cash	\$185.25
Cores	\$47.00					
Freight	\$0.00	Tax Freight	Yes			
Tax	\$5.25					
Total	\$185.25	Remaining	\$0.00			
Amt Paid	\$185.25	Deposited	\$0.00			

Save and Print Work Order	Print Work Order
	Email Work Order
	View Work Order
	Print Standard Work Order

Current User FRANK (F) Yard

To have these options, your settings must be configured to use the production work order format*.

* You can configure this in Checkmate Retro's **Change Invoicing** function: (Checkmate Full: **6,10,1**. Checkmate Classic: **S3,1**)

Changing Parts on Work Orders

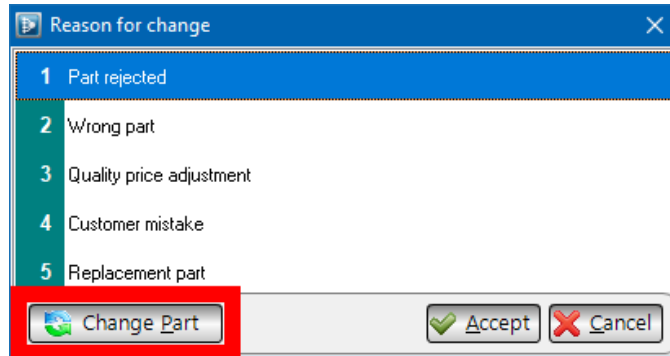
You can quickly change an Extra Sale part on a work order. Use this feature if you wish to remove the part on the work order and replace with another part.

⚠ Notes:

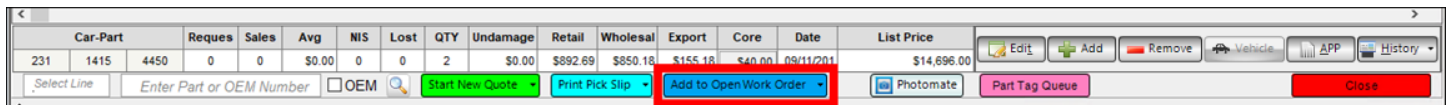
- This option is not available on posted invoices
- This option can be used to replace **Extra Sale** parts, but it is *not* available for **Exchange Sale** parts.

To change a part on a work order, follow these steps:

1. Click to **Remove** a part from the work order.
2. The **Reason for change** window opens. Click to highlight a reason, then click **Change Part**.



3. The **Parts** tab opens, displaying parts that have the same interchange number as the part you are replacing. Click to select a part, then click **Add to Open Work Order**.



4. The **Work Order/Invoice** tab opens. You can now proceed with the sale.

Create Purchase Orders (POs Tab)

Purchase orders can be created in one of two ways:

- Create a purchase order manually by clicking on this tab, and then clicking **New PO**.
- Purchase orders are created automatically when you create a work order for a *brokered* Extra Sale or an Exchange Sale. In this case, the number displayed in parenthesis on the **POs** tab will increase by one, prompting you to visit this tab and continue processing the purchase order (start by clicking the **Edit** button on the purchase order).

You can locate existing purchase orders to view and edit from either the **Find** tab or **POs** tab:

- **Find** tab:
 - Look up a purchase order in the **Find** tab's **Research** section.
 - Double-click a purchase order in the **Recent Activity** section.
- **POs** tab:
 - Use the **Enter Purchase Order #** field to enter a specific purchase order to work with.
 - Click the down arrow next to **Enter Purchase Order #**, to perform an advanced search. See the **Advanced Search for an Item** section of this document for more information about advanced searches.

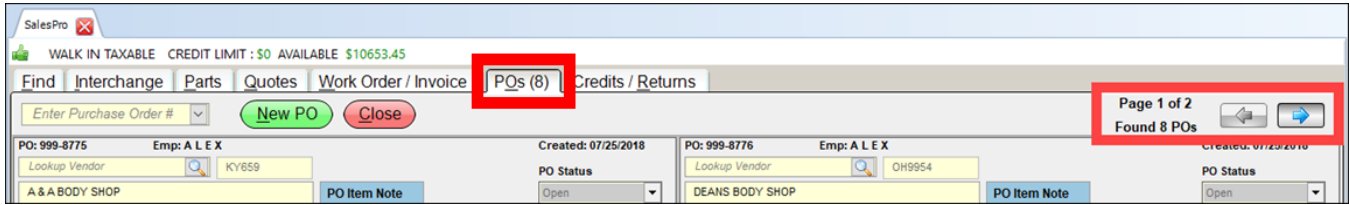
The screenshot displays the 'Sales Pro' software interface. At the top, there's a navigation bar with tabs: Find, Interchange, Parts, Quotes, Work Order / Invoice, POs (1), and Credits / Returns. The 'POs (1)' tab is active. Below the navigation bar, there's a search field labeled 'Enter Purchase Order #' with a magnifying glass icon, and two buttons: 'New PO' (green) and 'Close' (red). The main content area shows details for PO 999-8186, created on 08/15/2016, for employee JONATHANM. It includes a 'Lookup Vendor' field with 'KY1920' and a list of vendor details: 'Foreign Auto Salvage Rebuilders', '1980 Highland Pike', 'Ft Wright, Ky 41017', and contact information. A 'PO Item Note' box contains: 'Sale price: 55', 'Work Order 255015', and 'Condition:'. The 'PO Status' is set to 'Open' and the 'Total' is \$50.49. Below this is a table with columns: Part, Model, Year, Description, Cost, Sale Price, Status, Stock, Location, Department, WO, and IN. The table contains one row: DMR, CAMRY, 2005, Extra Sale -, \$50.4, \$55.00, Active, 130614, FC-15C, Brokered, 255015-1, ---. At the bottom, there's a toolbar with icons for adding, printing, viewing, emailing, opening, history, linking to sale, and saving.

From here, you can take the following actions:

- Enter/change vendor information.
- Use the **PO Item Note** text box to add a note to the purchase order.
- Click the **PO Status** drop-down to change the status to **Open**, **Submitted**, **Paid**, or **Void**. When you change this status to **Paid**, new fields appear that allow you to edit the amount, the payment method, the date of payment, and add a check or transaction number.
- Edit the **Description**, **Cost**, **Stock**, **Location**, **WO**, and **INV**, and **VIN** fields
- Edit the **Status (Active, Received, Returned, or Voided)**
- Edit the **Department**.
- Click the green plus sign button to add a new part line.
- Click the printer icon button to print the purchase order.
- Click the eye icon button to view the purchase order.
- **Email** the purchase order.
- **Open** the work order or invoice.
- Click the **History** button to view the **Purchase Order History**.
- Click the **WO** field to enable the **Link to Sale** button, allowing you to link this purchase to a work order. This button can be used if the purchase order is not connected to a work order already (which is the case if you created a **New PO**. This button allows you to search for an appropriate work order to link this purchase order to.
 - For more information about researching items, see the **Research** section of this guide.
- **Save** when you are finished editing.

Working with Multiple Purchase Orders

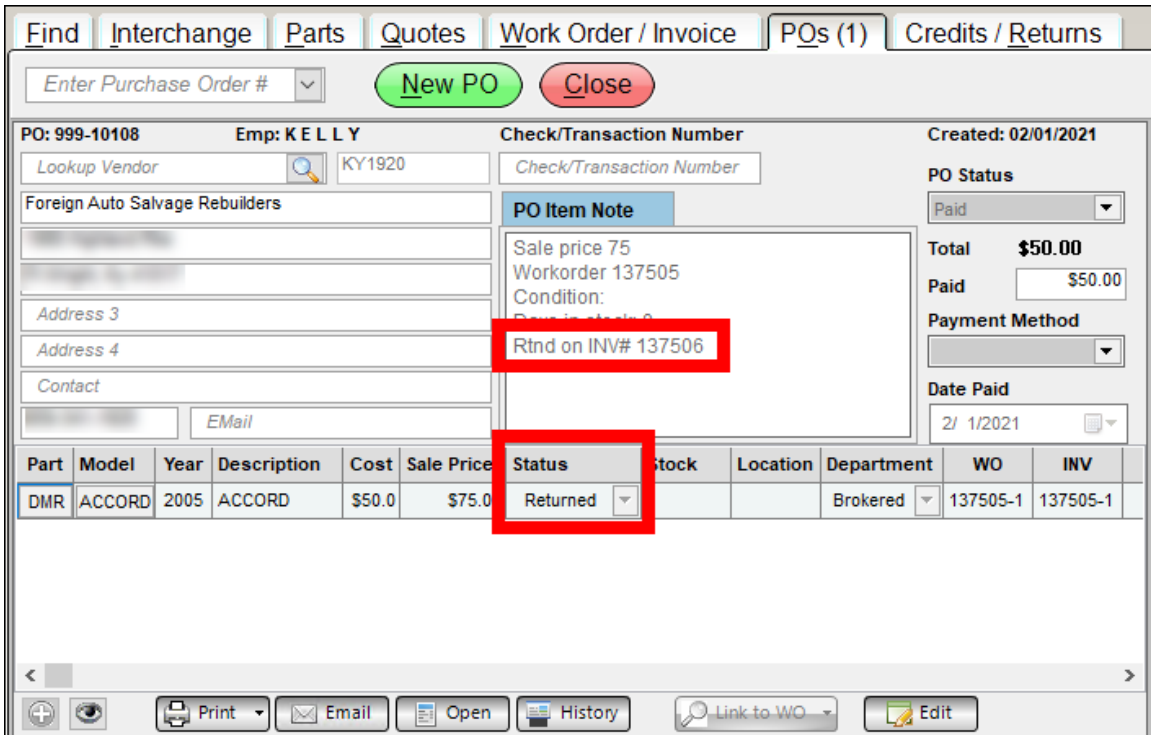
On the **POs** tab, the number of purchase orders that are currently displayed, will show on the tab itself and in the upper right-hand corner. If more than four purchase orders are displayed, blue arrow buttons will be available to page through the purchase orders.



Returned Purchase Order Parts

If a part on a purchase order is returned to your business, that part's **Status** on the PO is automatically set to **Returned**.

In addition, the number of the return invoice is recorded in the **PO Item Note** field.



Research

The **Research** section of the **Find** tab helps you find existing quotes, work orders, invoices, and more.

Each field is labeled for the item it will help you research. There are two ways to use each field:

1. Enter the information, such as the quote number, to search for that item.
2. Perform an advanced search for the item by other details, such as date and salesperson, by clicking the drop-down arrow.

Note: To use the **Search Parts** and **Search Customers** fields, you must click the drop-down arrow first, then enter more details.

Enter Information

The easiest way to find an item is to enter the specific information (such as the quote number) in the field. For example, to find a quote, follow these steps:

1. Enter the quote number in the text field.

2. Press **Enter** or click the drop-down arrow. The results of your search are displayed.

	Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Discount %	Tax %
					FRANK	09/13/2019	09/17/2019	09/18/2019	11/02/2019		7

	Sell	Part	Year	Model	Descrpt	Total Pr	Sale Pr	Tax	Total Retail	Total Wholesale	Warranty Desc	Stock	Location	Interchan	Departme	Interchange Desc	Cost	PO Account	PO Name	PO Price
1 - Remove	<input checked="" type="checkbox"/>	HLP-LH	2011	CAMRY	L.NEW.	\$180.00	\$18...	No	\$180.00	\$180.58	CUSTOMER D...	TYC10	_MISSNG	59863	USED PA...	L.	\$0.00			
2 - Remove	<input checked="" type="checkbox"/>	FEN-LH	2010	CAMRY	LH	\$100.00	\$10...	Yes	\$100.00	\$100.98	CUSTOMER D...	123RAQ		50247	USED PA...		\$0.00			
3 - Remove	<input checked="" type="checkbox"/>	ALT	2010	ALTIMA	2.5L (...)	\$83.00	\$55...	Yes	\$28.00	\$28.00	\$0-\$149 EMO...	140609		50326	USED PA...	2.5L (4 cyl), w/o hy	\$0.00			
EPA - Remove		EPA				\$3.00	\$3.00	No	\$0.00	\$0.00					USED PA...					

Advanced Search for an Item

If you do not know specific information (such as the quote number), you can search by other details. For example, to search for a quote, follow these steps:

1. With the **Enter Quote #** field blank, click on the drop-down arrow.

The screenshot shows a window titled "Research" with a list of search options, each with a drop-down arrow on the right. A red arrow points to the "Enter Quote #" option. The options are: Enter Quote #, Enter Work Order #, Enter Invoice #, Enter Purchase Order #, Search Parts, Search Customers, and Enter Pick Slip #.

2. The **Advanced Search** window opens. Enter information into the search fields.

- Use the calendar icon buttons (📅) to select a date, or enter a date in the MM/DD/YYYY format.

The screenshot shows the "Advanced Quote Search" window. It has a title bar with "Research" and a close button (X). The window contains several fields: Start Date (09/05/2019), End Date (09/05/2019), Salesperson (ALL), Status (Active), Part, Model, Interchange, Search for, Claim #, and Account. There are "Clear" and "SEARCH" buttons at the bottom.

- Most of the advanced searches have a **Search for** field, which you can use in several ways. The table below lists each advanced search that has a **Search for** field, and what you can use it to search for.

Advanced Search	Search for field	
Quote	Customer Name Customer Address Contact Name	Ship to Name Ship to Address
Work Order Invoice	Account Name Billing Address	Shipping Address
Parts	Stock # Year Interchange (or type *U* to search for Resolution Parts)	Interchange Description Description Condition Location
Customers	Account Name Address Phone	Terms Comment Shipping Address

3. Click **Search**. The **Research Results** window opens.

#	Date	Quote	Salesperso	Account	Name	Repair	Part	Model	Year	Yard
1	09/05/19	48091	DAC		WALKIN		ENGINE	VOLKSWAGEN	2001	999
2	09/05/19	48090	DANR				GLOVE BOX	FORD	1997	999
3	09/05/19	48089	DANR		Walk-In		ENGINE	FORD	1997	999
4	09/05/19	48088	DANR				ENGINE	FORD	1997	999
5	09/05/19	48087	SL		WALK-IN		OUTSIDE	HYUNDAI	2000	999
6	09/05/19	48087	SL		WALK-IN		ENGINE	TOYOTA CAMRY	2004	999
7	09/05/19	48086	US				TRANSMISSIO	TOYOTA CAMRY	2011	999
8	09/05/19	48086	US				ENGINE	TOYOTA CAMRY	2004	999
9	09/05/19	48085	AN		WALK-IN		IGNITION	MAZDA 626	1982	999
10	09/05/19	48085	AN		WALK-IN		ENGINE	TOYOTA CAMRY	2004	999
11	09/05/19	48084	JODY		WALK-IN		TRANSMISSIO	TOYOTA CAMRY	2011	999
12	09/05/19	48084	JODY		WALK-IN		ENGINE	TOYOTA CAMRY	2004	999

View Print Use Checkmate Codes Display requested Yr and Model Select Close

4. From here, you can:

- Open a specific quote by clicking on the quote in the **Research Results**, then clicking **Select**.
- View a preview of how the printed quote will appear by clicking on the quote, then clicking **View**.
- Print a specific quote by clicking on the quote, then clicking **Print**.

5. If you clicked **Select**, the quote will open on your screen.

SalesPro COLLISION PRO 555-5555 DANNY BILL OR BRIAN CREDIT LIMIT : \$4000 AVAILABLE \$3726.67

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Information: COLLISION PRO, Repairer: BILL, 777 FIXERUP RD, LIKE-NEWTOWN, KY 41017, Address 3: 555-5555

Ship To: COLLISION PRO, Repairer: BILL, 777 FIXERUP RD, LIKE-NEWTOWN, KY 41017, Address 3: 555-5555

Quote 999-47980 Status Active

Enter Quote # Add Part, Ex. TRA OEM

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Tax %
				K E L L Y	01/28/2021	01/28/2021	02/02/2021	04/28/2021	6

	Sell	Part	Year	Model	Description	Total Price	Sale Price	Tax	Total Retz	Total Who	Warranty Descrip	Stock	Location	Interchange	Department	Interchange Desc	PO Acco P
1 - Remove	<input checked="" type="checkbox"/>	KNE-LH	2009	CIVIC	Cpe, 1.8L (SOHC),...	\$78.84	\$78.84	No	\$78.84	\$75.09	CUSTOMER DECLI...	190811	FTWCAR	S0115		Cpe, 1.8L (SOHC), I	
2 - Remove	<input checked="" type="checkbox"/>	LCF-LH	2009	CIVIC	1.8L (SOHC), LH,...	\$52.59	\$52.59	No	\$52.59	\$50.00	CUSTOMER DECLI...	190811	FTWCAR	S0123		1.8L (SOHC), LH	

Parts \$131.43 Warranty \$0.00 Cores \$0.00 Freight \$0.00 Est. Tax \$0.00 Total \$131.43 Payment Charge

Selected Part COLLISION PRO

Quote	Date	Customer	SLS	Price	Grade
47980	01/28/21	COLLISION	KELL	\$78.84	A
47980	01/28/21	COLLISION	KELL	\$52.59	A

Quote Note Part Note Private Part Note Images

Fast Notes

Copy notes to WO

Promote All to WO Print Quote Edit Close

If you clicked **View**, a preview of the quote appears.

Quote 47980

Foreign Auto Salvage
Specializing in parts for 3 - 15 year old foreign vehicles
1980 Highland Pike
Fort Wright, Kentucky 41017
859-341-1920
10 minutes from downtown Cincinnati, Ohio
Open 8:30-5:30 Monday-Friday

Bill To: KY238
BILL
COLLISION PRO
777 FIXERUP RD
LIKE-NEWTOWN, KY 41017




Ship To: KY238
BILL
COLLISION PRO
777 FIXERUP RD
LIKE-NEWTOWN, KY 41017

Phone Number : 555-5555


Date Ordered	Ordering Dept	Customer PO	Expires	Claim Number:	Salesperson
1/28/2021			04/28/2021		KELLY

Item Detail	Req IC	Quote IC	Location	Kind	Stock No.	Amount
KNEE ASSEMBLY-LH 1 2009 HONDA CIVIC (SEE ALSO DELSOL & CRX)	50115	50115	FTWCAR	U	190811	\$78.84
Tag Number 0000479141						
						\$0.00
						\$0.00
LOWER CONTROL ARM FRONT-LH 2 2009 HONDA CIVIC (SEE ALSO DELSOL & CRX)	50123	50123	FTWCAR	U	190811	\$52.59
Tag Number 0000479142						
						\$0.00
						\$0.00

From here, you can:

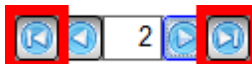
- **Print** the quote by clicking .
- **Save** the quote by clicking .
- **Find** specific keywords in the quote by clicking .
- **Zoom In/Zoom Out** by clicking the magnifying glass icon buttons or using the drop-down.



- Edit the **Page Settings**, such as page orientation and margins, by clicking .
- Use the single arrow buttons to view the **Prior Page** or **Next Page**.



- Use the **First Page** or **Last Page** buttons to view those pages.



Advanced Part Search

You can perform an advanced part search by clicking the drop-down arrow next to the **Search Parts** field. From here, you can search for parts by information such as stock number, tag number, location, etc.

The image shows a software interface titled "Research". It contains several input fields with drop-down arrows: "Enter Quote #", "Enter Work Order #", "Enter Invoice #", "Enter Purchase Order #", and "Search Parts". Below these is a sub-window titled "Advanced Part Search" with a close button (X). This sub-window has the following fields: "Part" (dropdown), "Model" (dropdown), "VIN 6" (checkbox), "Interchange" (checkbox), "Stock #" (checkbox), "Year" (text), "Search for" (checkbox), "Tag #" (checkbox), "eBay Item" (checkbox), and "Location" (checkbox). At the bottom of the sub-window is a "Display suppressed (req. not logged)" checkbox set to "No". There are "Clear" and "SEARCH" buttons at the bottom of the sub-window.

- **Location** – Type a location to search for parts in a single location, or:
 - Type the beginning of a location followed by an asterisk (*) to perform a “wildcard” search. This searches for parts in all locations that start with what you typed regardless of how long the location name is.
Example: The locations in the second aisle of your warehouse all begin with **W02**. Type **W02*** to search for all parts in the second aisle of your warehouse.
 - Type part of a location, using question marks (?) to represent characters in the location name. This searches for parts in locations that match the non-question mark characters and are the same length as what you typed.
Example: Type **9B???A** to search for parts in all locations that have a 6-character name that begin with '9B' and end in 'A.'

Display Suppressed (req. not logged) – To include suppressed parts in search results, set this field to **Yes**. Suppressed parts are those that are set to not display in regular search results*. This could be for a variety of reasons (i.e., the part is in review or the vehicle has not been cleared). If you set this field to **Yes**, no sales request will be logged for this search.

* You can define suppressed parts in Checkmate Retro using the **Find and Sell display suppressions** function:

(Checkmate Full: **6,10,14**. Checkmate Classic: **S3,15**)

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CSP-92-B-UG-C 6/2/21

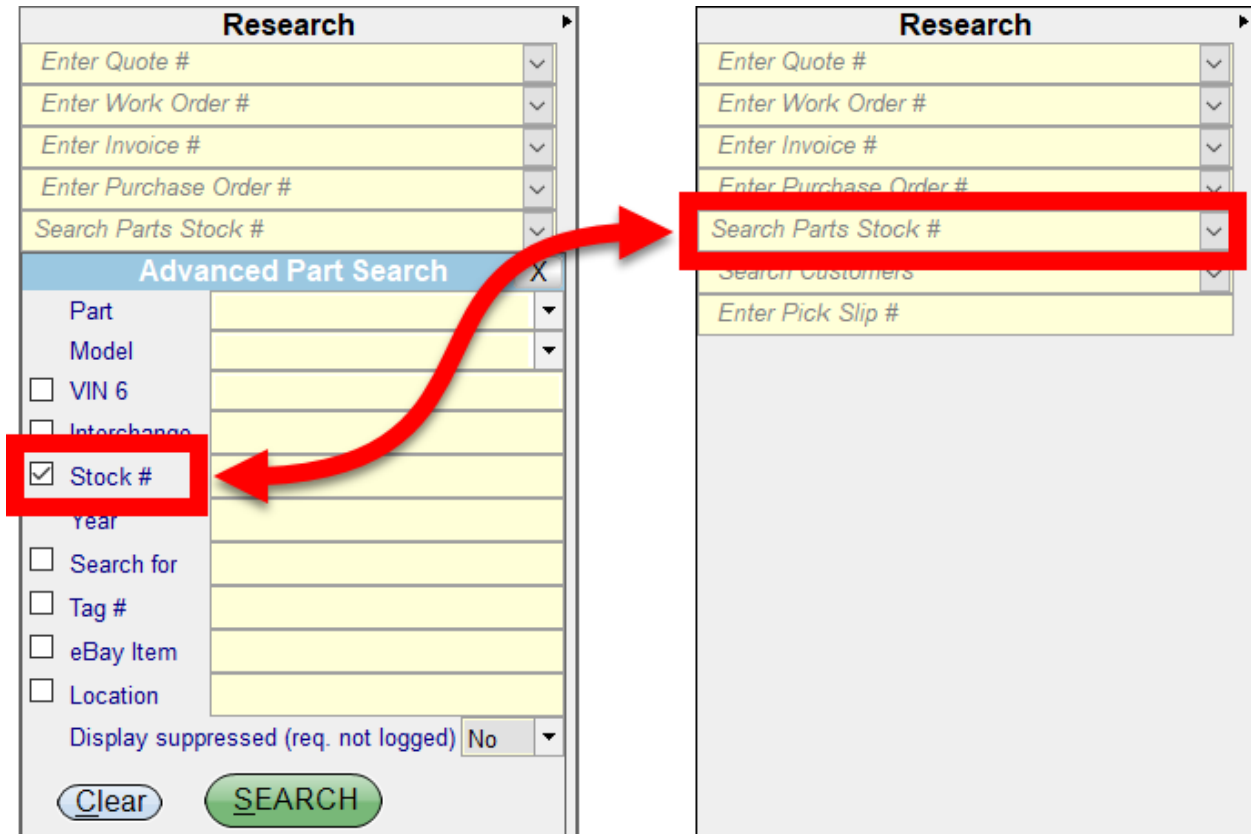
Save Search Option for Advanced Part Search

If you frequently perform advanced part searches using the same criteria, you can save one of the *advanced* part search options to use the next time you search (so you don't have to open the **Advanced Part Search** panel next time to use this search option).

To use this feature, use the checkboxes (shown below), to select the search option you want to save.

The screenshot shows the Car-Part.com search interface. At the top, there are navigation tabs: Find, Interchange, Parts, Quotes, Work Order / Invoice, POs, and Credits / Returns. The main interface is divided into two panels: 'Part and Vehicle Search' on the left and 'Research' on the right. The 'Part and Vehicle Search' panel includes fields for 'Enter customer information to search', 'Quick Search e.g, 98, MUSTANG, ENG, TRA', 'Enter VIN or Year', 'Enter Model', and 'Enter Part' with an 'OEM' checkbox. The 'Research' panel includes fields for 'Enter Quote #', 'Enter Work Order #', 'Enter Invoice #', 'Enter Purchase Order #', and 'Search Parts'. Below these is the 'Advanced Part Search' panel, which is highlighted with a blue header and a close button 'X'. This panel contains a list of search criteria with checkboxes: 'VIN 6', 'Interchange', 'Stock #', 'Year', 'Search for', 'Tag #', 'eBay Item', and 'Location'. A red box highlights these checkboxes. At the bottom of the 'Advanced Part Search' panel, there is a 'Display suppressed (req. not logged)' dropdown set to 'No', and 'Clear' and 'SEARCH' buttons.

Selecting an option saves that option for future searches. In the example below, the image on the left shows that the **Stock #** is the saved search option. In the image on the right, the “**Search Parts Stock #**” text displayed in the field indicates that the stock number option is selected. With this option selected, you can type a stock number right in the **Search Parts** field, without having to open the **Advanced Part Search** panel to perform a part search using a stock number.



To search for parts using criteria that's different than the saved option, just click the drop-down arrow to open the **Advanced Part Search** panel and perform the search as usual using the appropriate field. There is no need to uncheck the box for your saved search option. You can change the saved search option at any time by checking a different box.

Look Up the Last Six Digits of a VIN

In the **Research** section of the **Find** tab, you can search for a part by using only the last 6 digits of a VIN. With this feature, you can locate all parts of your inventory with a VIN ending in those last six digits.

To find parts using this feature, follow these steps:

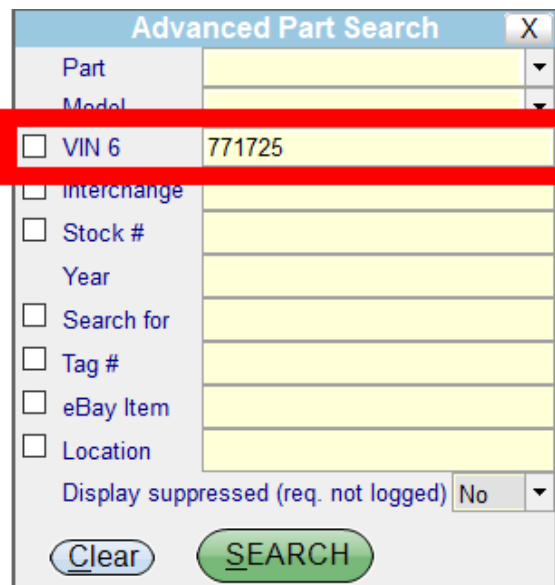
1. In the **Find** tab's **Research** section, click the **Search Parts** drop-down menu.



The screenshot shows a 'Research' panel with a list of search options: 'Enter Quote #', 'Enter Work Order #', 'Enter Invoice #', 'Enter Purchase Order #', 'Search Parts', 'Search Customers', and 'Enter Pick Slip #'. The 'Search Parts' option is highlighted with a red rectangular box. Below the list is a blue button labeled 'LAST SEARCH'.

2. The **Advanced Part Search** window opens. Enter the last 6 digits of the VIN in the **VIN 6** field, then click **SEARCH**.

Note: For a more advanced search, you can also enter a part in the **Part** text field. This will search for parts that match *both* the part and the VIN information.



The screenshot shows the 'Advanced Part Search' window. It has a title bar with 'Advanced Part Search' and a close button 'X'. The window contains several search criteria with checkboxes and input fields: 'Part', 'Model', 'VIN 6' (checked, value: 771725), 'Interchange', 'Stock #', 'Year', 'Search for', 'Tag #', 'eBay Item', and 'Location'. At the bottom, there is a 'Display suppressed (req. not logged)' dropdown set to 'No', and two buttons: 'Clear' and 'SEARCH'.

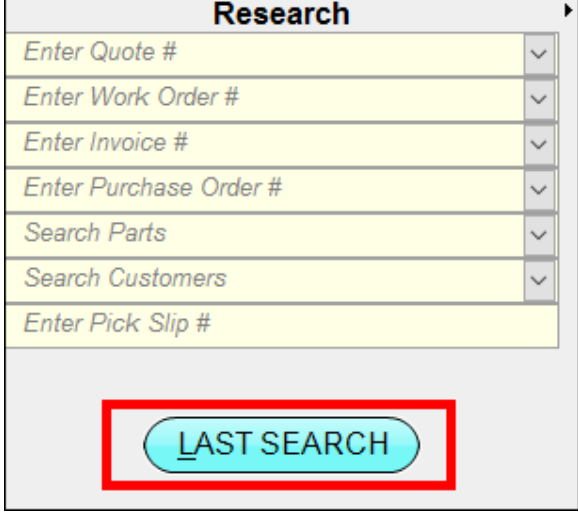
The **Parts** tab opens with the results of your search.

Last Search Button

To duplicate the last search you performed, click the **LAST SEARCH** button. This will open the search results of your last search.

Notes:

- The **LAST SEARCH** button can *only* duplicate Advanced Searches (i.e., searches using the drop-down arrow button).
- When you close Sales Pro, the information about your last search is lost. When you re-open Sales Pro, this button will not be active until a new search is performed.



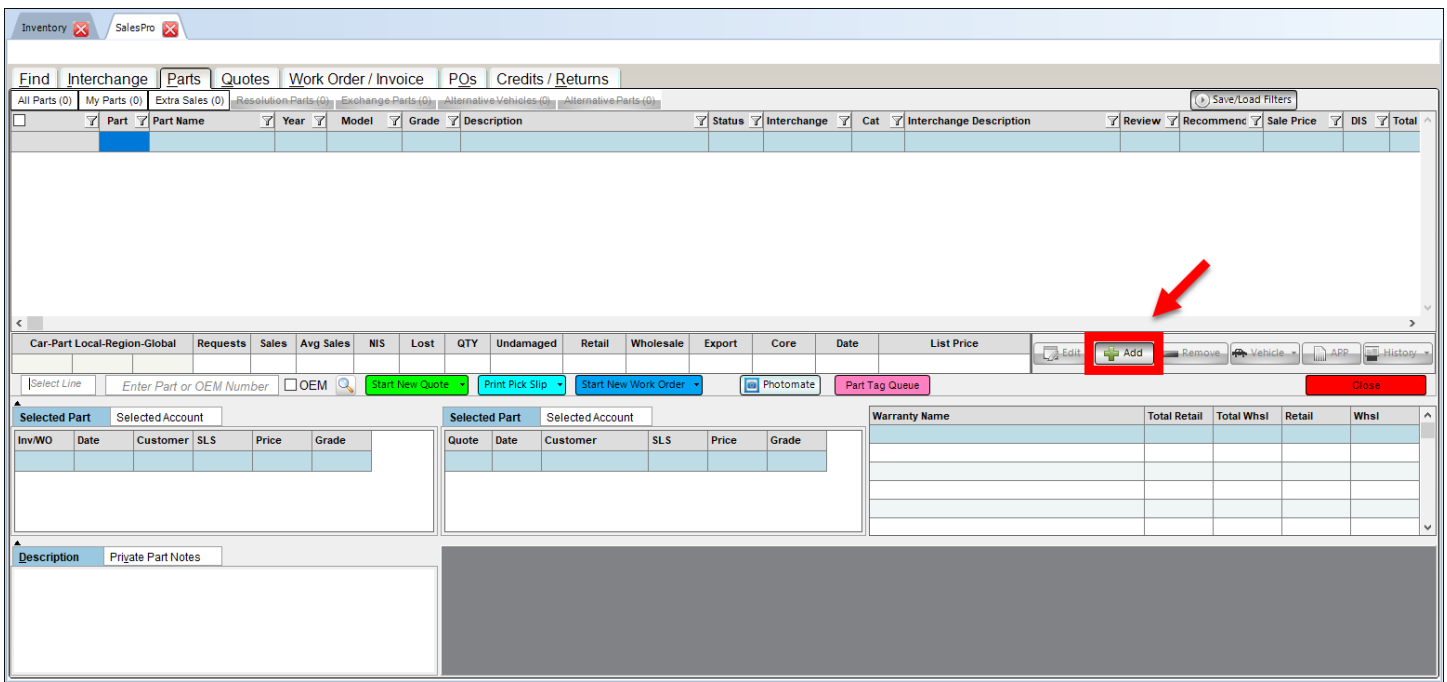
Research	
Enter Quote #	▼
Enter Work Order #	▼
Enter Invoice #	▼
Enter Purchase Order #	▼
Search Parts	▼
Search Customers	▼
Enter Pick Slip #	

LAST SEARCH

Enter/Add Loose Parts

To enter a loose part into inventory,

1. Click on the **Parts** tab to open it (you do not need to search for a part).
2. Click **Add**.



The **Inventory** tool opens, displaying the **Part – Add** tab. Use this screen to add the part. For more information about this process, refer to the Checkmate Inventory User Guide, which you can find at http://products.car-part.com/checkmate/training_inventory.html

Credit and Return Parts (Credits/Returns Tab)

To credit or return a part:

1. Use the **Research** section of the **Find** tab to look up the invoice.
2. The **Work Order/Invoice** tab opens with the invoice. Click the **Credit/Return** button at the bottom of the invoice.

The screenshot shows the SalesPro interface for a 2010 CAMRY. The 'Credits / Returns' tab is active. The invoice summary at the bottom includes a table with columns: Parts, Warranty, Cores, Freight, Tax, Total, Remaining, Amt Paid, and Deposited. A red box highlights the 'Credit/Return' button, with a red arrow pointing to it from the right.

3. The **Credits/Returns** tab opens. Click the **Return** button next to each part you would like to credit or return, or use the **Return Part** drop-down. (Click the magenta **Select ALL for Return** button to select all parts on the invoice.)

Note: On the **Credits/Return** tab, you can click the **Print Label** button at any time during the return process; the return label will only have the original work order on it.

4. The **Reason for change** window opens. Click to select a reason for the credit or return, then click **Accept**.

The 'Reason for change' dialog box is shown with the following content:

Choose A Reason	
1	Part Return
2	Discount on Sale
3	Wrong Part
4	Discount Coupon
5	Warranty Return

Buttons:

5. Locate the **Restock** column. (You may need to scroll horizontally to find it.)

Using the drop-down in this column, choose whether to restock the part **Now**, or **Later**.

- If you select **Later**, the part will be moved to the restock file*.

Order Date	Ordered By	Ordered By	Customer PO	R/O #	Truck	Sales Person							
05/11/2016					SOUTHRUN	KELLY							
Returned	Part	Year	Model	Description	Total Price	Sale Price	Remaining to Credit	Credit Amount	Total Credit	Tax	Return Part	Restock	Return
	ENG	2009	COROLL	(RV 178-1) COROLL 09 Int.	\$795.67	\$795.67	\$0.00	\$795.67	\$795.67	Yes	Yes	Now	Yes
Return	CORE-C	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	No
Return	ENG	2009	COROLL	COROLL 09 Int.65038 1.8L (...)	\$795.67	\$795.67	\$795.67	\$0.00	\$0.00	Yes	No	Now	No
Return	CORE-C	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	No
Return	ENG	2009	COROLL	COROLL 09 Int.65038 1.8.M.	\$795.67	\$795.67	\$795.67	\$0.00	\$0.00	Yes	No	Now	No
Return	CORE-C	2009	COROLL	ENGINE ASSEMBLY	\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	Yes	No	No	No

6. Locate the **OT** column. (You may need to scroll horizontally to find it). Using the drop-down in this column, choose:

- **Yes** to send this return to Order Trakker
- **No** to *not* send this return to Order Trakker

Notes:

- Only part and core returns can be sent to Order Trakker.
- You can set the default option for sending returns to Order Trakker on the **Settings>Workstation>Sales Pro>Misc** tab.

7. Repeat steps 3-6 for any more parts you wish to return and restock.

8. Click one of the following buttons at the bottom of the screen. Each performs an action *and* will *also* direct you to the Checkmate Inventory tool to restock the part(s).

- **Print Credit Work Order**
 - Click this button, or click the arrow for more options.
- **Print Credit Invoice**
 - Click this button, or click the arrow for more options.

9. The Checkmate Inventory tool opens with the part(s) you're returning displayed to restock. For each part being restocked:

- Click inside the **Location** field.
- Type the new location.

10. Click the save button.

Note: When a part is credited or returned, a part note is added to the invoice.

* You can restock the part in Checkmate Retro using the **Restocking** function: (Checkmate Full: **5,12,19**. Checkmate Classic: **V12,19**).

Customize Display

On the **Credits/Returns** tab, you can customize your display by:

- Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.
- Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).
- Using the horizontal scroll bar to see all the available information for each part (some users find it convenient to use wide-screen monitors with Checkmate Sales Pro, but it is not necessary).

The screenshot shows the SalesPro interface for the 'Credits/Returns' tab. At the top, it displays 'JOHN CUSTOMER 555-555-5555 CREDIT LIMIT : \$2000 AVAILABLE \$1584.47'. The main area is divided into several sections:

- Customer Information:** Includes fields for name, address, and contact info. A red circle 'A' is placed over the 'Order Date' field (09/30/2019).
- Work Order/Invoice:** Shows 'Work Order 999-501814' and 'Invoice 748 POSTED'. A red circle 'B' is placed over the 'Customer' field.
- Main Table:** A table with columns for Part, 2 Character, Year, Model, Description, Sale Price, Remaining, Credit Am, Total Credit, Tax, Return Par, Restock, Return Wa, Warranty D, Return Fre, Return Pall, Department, PO, Ret Yard, and Ret Invoik. A red circle 'C' is placed over the horizontal scroll bar below the table.
- Sales Summary:** A section on the left with fields for Parts (\$358.54), Warranty (\$30.00), Cores (\$0.00), Freight (\$0.00), Tax (\$26.99), Total (\$415.53), Remaining (\$415.53), Amt Paid (\$0.00), and Deposited (\$0.00).
- Payments:** A table with columns for Pmt #, Method of Payment, and Amt Paid. It shows one payment of \$0.00 via 'Charge'.
- Credits:** A section with fields for Parts (\$0.00), Warranty (\$0.00), Cores (\$0.00), Freight (\$0.00), Tax (\$0.00), Total (\$0.00), and Amt Paid (\$0.00).
- Private Part Note:** A section with a 'WO/Invoice Note' field.

At the bottom, there are buttons for 'Select ALL for Return', 'Print Credit Work Order', 'Print Credit Invoice', 'Print Return Label', and 'Close'.

Partially Credit a Part

In Sales Pro, you can give a customer partial credit for a part. To use this feature, follow these steps:

1. Use the **Research** section of the **Find** tab to look up the invoice.
2. The **Work Order/Invoice** tab opens with the invoice. Click the **Credit/Return** button at the bottom of the invoice.

The screenshot shows the Sales Pro interface for a customer bill. The 'Work Order / Invoice' tab is active. At the bottom of the interface, the 'Credit/Return' button is highlighted with a red box and a red arrow pointing to it. Other buttons include 'Print Invoice', 'Print Label', 'Work Order History', and 'Close'.

Order Date	Ship Date	Due Date	Ordering	Customer PO	Dismantler	Core	R/O #	Truck	Sales Person	Discount %	Tax %
09/13/2019	09/10/2019	09/10/2019				OUTRIGHT			ALEX		7

Year	Part	Model	Description	Total Price	Sale Price	Discounted	Tax	Total Retail	Total Whole	Warranty Description	Stock	Location	Interchange	Department	Interchang	Cost	Cat
2001	ENG	GOLF	GOLF (Extra Sale) 01 Int.763	\$500.00	\$400.00	Yes	No	\$100.00	\$100.00				76318C	USED PART S		\$0.00	
2001	CORE-DUE	GOLF	ENGINE ASSEMBLY	\$75.00	\$75.00	No	No	\$0.00	\$0.00					CORES		\$0.00	

Part	Warranty	Cores	Freight	Tax	Total	Remaining	Amt Paid	Deposited
\$500.00	\$0.00	\$75.00	\$0.00	\$0.00	\$575.00	\$0.00	\$575.00	\$0.00

WO	Date	Customer	SLS	Price	Grade
501678	08/23/19	Walk-In	ALEX	\$300.00	
501642	08/14/19	Walk-In	ALEX	\$100.00	
501574	07/25/19	walkin	ALEX	\$400.00	X
501561	07/24/19	walkin	ALEX	\$400.00	X

3. The **Credits>Returns** tab opens. Click the **Credit Amount** button to edit how much a customer should be credited for a part.

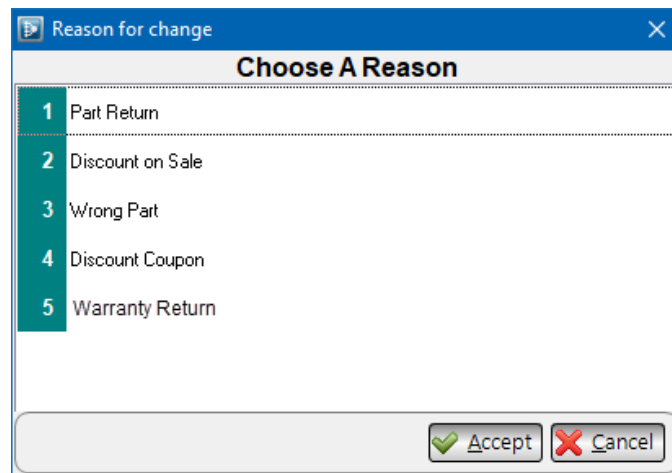
Order Date	Ordered By	Ordered By Department	Customer PO	R/O #	Truck	Sales Person
05/16/2016	JONATHAN				SOUTH RUN	JONATHAN

Part	Year	Model	Description	Total Price	Sale Price	Remaining to Credit	Credit Amount	Total Credit	Tax	Return Part	Restock	Return Warranty	Warranty Description
Return	2002	CAMRY	CAMRY 02 RH 58927 RH PURPLE F	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00	No	No	No	No	

4. The **Credit Amount** window opens. Enter the amount to credit and click **Accept**.

The 'Credit Amount' dialog box is shown with the 'New Credit Amount' field containing '25.00'. The 'Accept' button is highlighted with a green checkmark, and the 'Cancel' button is highlighted with a red X.

5. The **Reason for change** window opens. Click to select a reason for the credit, then click **Accept**.



6. The **Amount Paid** field displays the total amount to be given to the customer. Click **Print Credit Invoice** to print, or click the arrow for more options.
7. Click **Close** to return to the **Find** tab.

Resolution Parts

Parts “in resolution” are parts that need interchange numbers assigned to them. To help you identify these parts on the **Parts** tab, they are highlighted yellow in Checkmate Sales Pro search results*.

If a part is yellow in your search results, you cannot be sure that these parts are an actual match for the part you looked up because, Checkmate doesn't have the interchange information it needs to make that decision. Checkmate is still waiting for manual review of this part after an interchange release.

Part	Year	Model	Grade	Interchan	Description	Sale Price	Interchange Description	Status	Recommend	Total Retail	Cat	Miles
1	ACH	1999	PORBOX	A	X U X	FTWCAR	\$52.71	A/C Refrigerant Discharge Hose, base n	Push	\$52.71	ND	68536
2	ACH	1999	PORBOX	A	X U X	FTWCAR	\$52.71	A/C Refrigerant Liquid Hose, base mode	Push	\$52.71	ND	68536
3	ACH	1999	PORBOX	A	X U X	FTWCAR	\$52.71	A/C Refrigerant Liquid Hose, base mode	Push	\$52.71	ND	68536

For these parts, no Price Book prices will be listed and no Car-Part request data will be available because Checkmate requires interchange information to display that data.

Car-Part	Reques	Sales	Avg	NIS	Lost	QTY	Undamage	Retail	Wholesal	Export	Core	Date	List Price
			\$0.00			1	\$0.00	\$0.00	\$0.00	\$0.00			

There are several things that will cause parts to be put in resolution:

- The part was inventoried without an interchange number.
- Interchange numbers could change after an interchange release (e.g., a correction, new information). Parts may have been inventoried using one code or interchange number, but then after a new interchange release, they have to be inventoried differently.
- When a preexisting part code is given interchange during an interchange release, all of the parts that were inventoried using that part code will be put in resolution.
- Models that were split during an interchange release may need to be re-inventoried. Review the interchange release documentation to see if any model splits occurred. SmartVin automatically moves parts to the correct model based on the VIN, but if the interchange number assigned to a part is invalid, the part will go into resolution.
 - If a vehicle does not have a VIN associated with it or if the VIN is incorrect, use the **Print Release Notes** function† to view a list of stock numbers that did not split successfully. For more information about what you should do in this instance, see the **Update Models after a Model Split** section of the **How to Review Resolution Parts** guide.
- In rare cases, a part code may be split into separate codes after a new interchange release.

For more information about reviewing parts in resolution and assigning interchange, please refer to the **How to Review Resolution Parts** guide. You can find this guide and other Checkmate Training materials at <http://products.car-part.com/checkmate/training.html>

* If you don't want Resolution Parts to appear in search results in Sales Pro, you can configure this in the **Sales Defaults** menu in Checkmate Retro (Checkmate Full: **6,9**. Checkmate Classic: **S5**).

† Access this in Checkmate Retro (Checkmate Full: **6,17**. Checkmate Classic: **U11,11**).

Keyboard Shortcuts

Use keyboard shortcuts to perform the following actions on the specified tabs:

All Tabs

- **Alt+F** opens the **Find** tab.
- **Alt+I** opens the **Interchange** tab.
- **Alt+P** opens the **Parts** tab.
- **Alt+Q** opens the **Quotes** tab.
- **Alt+W** opens the **Work Order/Invoice** tab.
- **Alt+O** opens the **PO** tab.
- **Alt+R** opens the **Credits>Returns** tab.

Find Tab

- **Alt+D** conducts a search.
- **Alt+T** resets the search criteria.

Interchange Tab

- **Alt+A** opens the interchange applications for the selected part.
- **Alt+C** cancels the part lookup.
- **Alt+L** opens the **Research Results** of your most recent search using the **Research** section.
- **Alt+S** is an alternative to pressing the **Search Inventory** button.

Parts Tab

- **Alt+L** opens the **All Parts** tab.
- **Alt+M** opens the **My Parts** tab.
- **Alt+N** opens the **Resolution Parts** tab.
- **Alt+X** opens the **Exchange Parts** tab.
- **Alt+H** opens the **Alternative Vehicles** tab.
- **Alt+A** opens the interchange application for the highlighted part.
Alt+T allows you to edit the information for the highlighted part.
- **Alt+V** allows you to add **Private Part Notes**.
- **Alt+D** displays the part's description.
- **Ctrl+Q** starts a new quote for the selected part(s).
- **Ctrl+U** adds a part to a previous quote.
- **Ctrl+W** starts a new work order.

WO/Invoice Tab

- **Ctrl+W** allows you to view a preview of the work order.
- **Ctrl+E** opens the work order for editing and saves the work order.
- **Ctrl+T** prints the work order.
- **Ctrl+Shift+W** places the cursor in the work order search box.
- **Alt+N** allows you to view WO notes.
- **Alt+T** allows you to edit tax information on the work order.
- **Ctrl+I** promotes the work order to an invoice.
- **Ctrl+Shift+I** places the cursor in the invoice search box.
- **Ctrl+L** emails and prints the invoice.
- **Ctrl+M** emails the invoice.
- **Alt+D** changes the department for the sale.

Tips and Tricks

To perform searches more efficiently in Sales Pro, there are some tricks that you may find helpful.

Find Customer with Extra Information

On the **Find** tab, locate the **Part and Vehicle Search** section. In the **Enter customer information to search** field, enter the customer's name and include more information about the customer. For example, if you want to search for Foreign Auto Salvage on Highland Pike, you could enter "FOREIGN AUTO, HIGHLAND" and Sales Pro will search account descriptions and display customer accounts that start with "FOREIGN AUTO" and include "HIGHLAND" in their account.

Find Parts with Year Range

On the **Find** tab, locate the **Part and Vehicle Search** section. In the **Enter VIN or Year** field, you can initiate searches using a year range. For example, if you enter "2000-2006" in your part search, Sales Pro will search your inventory and display available parts for those years.

 **Note:** If you search for a year range on the **Find** tab, Sales Pro skips the **Interchange** tab and proceeds to the search results.

Find Parts with Single Entry

On the **Find** tab, locate the **Part and Vehicle Search** section. In the **Enter Model** field, enter a model and click the green **Find** button. The **Parts** tab opens, displaying all parts for that model. On the **Find** tab, you can also enter only part code(s) in the **Enter Part** field and Sales Pro will display available parts for all models in your inventory.

Find Parts with Extra Information

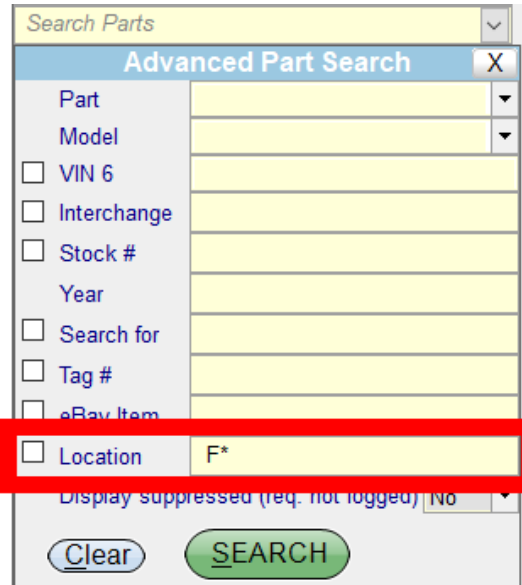
On the **Find** tab, locate the **Part and Vehicle Search** section. In the **Enter Part** field you can use the following search methods:

- Enter the part and include details about the part you are searching for. For example, if you search for "FEN, BLUE EXT" Sales Pro will search part descriptions for "BLUE EXT," and display fenders that contain those keywords in their description.
- When searching for a tire, enter the part code and tire size, separated by a comma. For example, if you search for "TIR, 175/65-15" Sales Pro will search part descriptions for "175/65-15," and display tires that contain that size in their description.
- If you know the interchange number for the part you are searching for, enter the part code and interchange number, separated by a dash. For example, if you search for "ENG-65131" Sales Pro will search your inventory and display engines with this interchange number.

Find Parts Using Wildcard Method

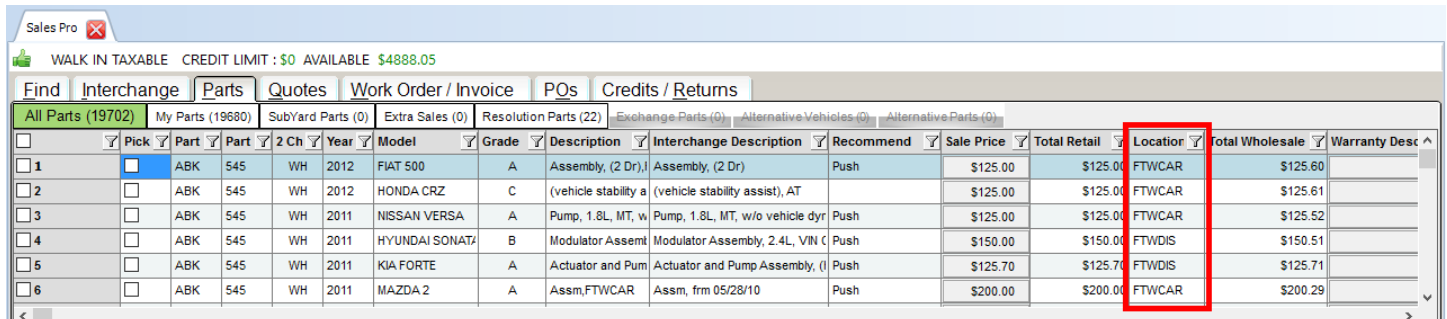
The “wildcard” method allows you to search for a part quickly and easily. If you know the first letter/number of a part’s Location or Stock number, you can use the **Research** section of the **Find** tab to search for all parts that start with that letter/number. Here’s how:

1. In the **Search Parts** field of the **Research** section, click on the drop-down arrow to perform an **Advanced Part Search**.
2. Enter the first letter/number of the part’s **Location**, followed by an asterisk (*). Then click **SEARCH**.



The image shows a screenshot of the 'Advanced Part Search' dialog box. The 'Location' field is highlighted with a red box and contains the text 'F*'. The 'SEARCH' button is visible at the bottom.

3. The **Parts** tab opens, displaying all parts with a **Location** that begins with the letter/number you specified in your search.



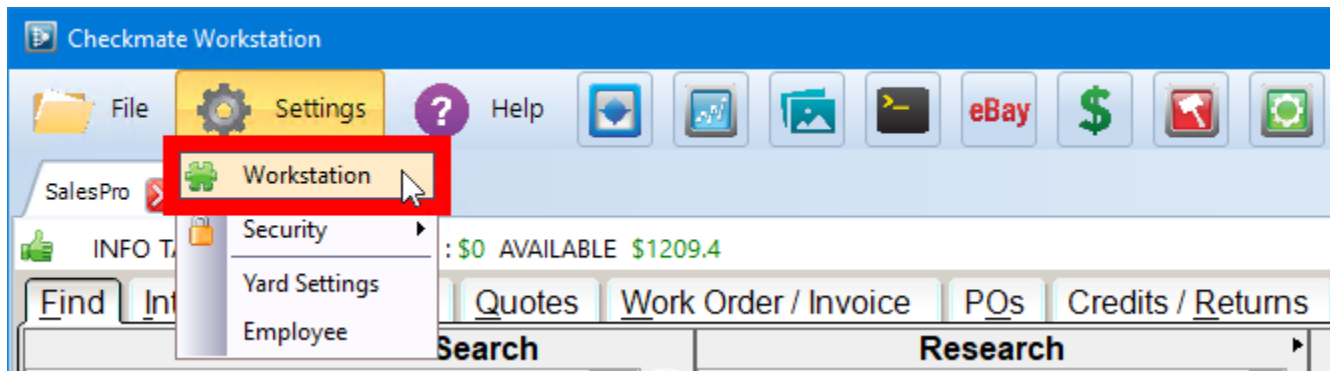
The image shows a screenshot of the 'Sales Pro' application. The 'Parts' tab is selected, and the 'Location' column is highlighted with a red box. The table displays the following data:

Pick	Part	Part	2 Ch	Year	Model	Grade	Description	Interchange Description	Recommend	Sale Price	Total Retail	Location	Total Wholesale	Warranty Desc	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2012	FIAT 500	A	Assembly, (2 Dr),	Assembly, (2 Dr)	Push	\$125.00	\$125.00	FTWCAR	\$125.60	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2012	HONDA CRZ	C	(vehicle stability a	(vehicle stability assist), AT		\$125.00	\$125.00	FTWCAR	\$125.61	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2011	NISSAN VERSA	A	Pump, 1.8L, MT, w	Pump, 1.8L, MT, w/o vehicle dyr	Push	\$125.00	\$125.00	FTWCAR	\$125.52	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2011	HYUNDAI SONATA	B	Modulator Assem	Modulator Assembly, 2.4L, VIN C	Push	\$150.00	\$150.00	FTWDIS	\$150.51	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2011	KIA FORTE	A	Actuator and Pum	Actuator and Pump Assembly, (I	Push	\$125.70	\$125.70	FTWDIS	\$125.71	
<input type="checkbox"/>	<input type="checkbox"/>	ABK	545	WH	2011	MAZDA2	A	Assm.FTWCAR	Assm, frm 05/28/10	Push	\$200.00	\$200.00	FTWCAR	\$200.29	

Settings

Workstation

Many of the functions discussed in this guide can be further customized in **Settings**. To access these settings, go to **Settings>Workstation** in the top menu. The **Setup** window opens.



For more information about how to configure the settings available here, reference the Checkmate Workstation User Guide. You can find this guide and other Checkmate Training materials at <http://products.car-part.com/checkmate/training.html>

Checkmate Retro

There are some functions that currently rely on the Checkmate Retro interface. We are working to get these functions into Sales Pro and the Inventory tool, but you currently have to switch over to the Retro version of Checkmate in order to perform certain tasks. To find out more about these functions, go to products.car-part.com/checkmate/training.html and locate the **Retro & Miscellaneous** section for training materials.

To switch over to the Checkmate Retro interface, click the **Checkmate Retro** button in the Checkmate Workstation toolbar. **After you have completed these tasks, close the Terminal tab and return to the Sales Pro and Inventory tabs.**



Inventory

The following inventory functions must be completed in the Retro version of Checkmate:

	Checkmate Full menu option	Checkmate Classic menu option
• Print Dismantling Report	(2,3)	(I13)
• Print Backorders	(2,7)	(K)
• Print Inventory Reports	(2,8)	(U20)
• Print Title Report	(2,13)	(U21)
• Enter Assembly Table	(2,16)	(S7,22)
• Print Buying Guide	(2,18)	(V18)
• Bar-code Scanner Processing	(2,19)	(I23)
• Shipping Notification Inquiry	(2,20)	(I24)
• Location/Category Table Maint	(2,21)	(I25)


Accounting

The following accounting functions must be completed in the Retro version of Checkmate:

	Checkmate Full menu option	Checkmate Classic menu option
• Enter or Change Document	(3,5)	(A3,2)
• Delete Paid Invoices	(3,6)	(A3,13)
• Calculate Finance Charges	(3,7)	(A3,8)
• Clear Period to Date	(3,8)	(A3,14)
• Clear Year to Date	(3,9)	(A3,15)
• Print Invoice Register	(3,12)	(A3,7)
• Print Statements	(3,13)	(A3,10)
• Print Customer List	(3,14)	(A3,6)
• Print Mailing Labels	(3,15)	(U15)
• Enter or Change a Batch	(3,17)	(A14)
• Print Batch Summary	(3,18)	(A16)
• Post Invoices	(3,19)	(A12)
• Print Invoice Proofing Report	(3,20)	(A15)
• Daily Sales Journal	(3,24)	(A3,20)
• Salesperson Invoice Summary	(3,27)	(A22)
• Taxing Authority Table	(3,28)	(A3,23)
• Tax Breakdown Report	(3,29)	(A3,24)
• Inactive Account Report	(3,30)	(A3,26)

Appendix A: Part Information Columns




Throughout Sales Pro, on many of the tabs and windows that display part information, you can customize the information that's visible for each part by editing which columns are displayed.

 **Note:** If you have multiple tabs of Sales Pro open and you change your column configuration, Checkmate will save the configuration from whichever Sales Pro tab is closed last. It is recommended that you close all Sales Pro tabs except one, *before* you change your column configuration.

To change which columns are displayed, follow these steps:

1. Right-click on any column header.
2. The **Columns** window opens, displaying a list of available columns for the current tab or window.

From here, you can:

- Click to select/de-select individual columns in the list.
 - Click **Show All**  to select all columns in the list.
 - Click **Restore**  to select only the default columns.
3. Click **Close**.  This sets the column configuration for the current tab/window for the entire workstation.
 4. To save this configuration, close and re-open Checkmate Workstation.

All available information columns are listed below.

 **Note:** Some part information columns listed are available only on certain tabs/windows.

- **Pick** – This column must be enabled in order for you to check parts for a pick list.
- **Part** – Checkmate part code (hover your mouse over this column to see the full part name.) (If this column is red, that means there is a private note for that part.)
- **Part #** – Numeric part code (hover your mouse over this column to see the full part name)
- **2 Character code** – Two-character part code
- **Year** – Vehicle year
- **Model** – Vehicle model
- **Grade** – Part grade
- **Description** – Part description (this description is uploaded to online part listings)
- **Interchange Description** – Description from Car-Part Interchange
- **Recommended** – Indicates Checkmate's recommendation for this part.
 - **Over\$** – Indicates that this part may be overpriced.
 - **Push** – Indicates that there is not much demand for this part, and your salesperson may wish to push the sale.
- **Sale Price** – Actual price the customer will be charged. This number is calculated according to your system's configuration.
- **Total Retail** – Includes Base Retail plus any applicable core charges, warranty charges, freight charges, and/or pallet charges
- **Total Wholesale** – Includes Base Wholesale plus any applicable core charges, warranty charges, freight charges, and/or pallet charges

- **Warranty Description** – Warranty currently applied to this part. Click this field to open the **Select Warranty** window, where you can select a warranty to apply to this part. The **Select Warranty** window will only show warranties that are available for this part type.
- **Status** – Status of the part.
 - Blank – Part is available for sale.
 - **H** – Hold. This part has been placed on hold. These parts display orange in search results.
 - **I** – Invoice. This part is already on an existing invoice, but the invoice has not yet been posted. These parts display red in search results.
 - **S** – Sold. This part has been sold and the invoice has been posted. These parts display red in search results.
 - **W** – Work Order. This part is already on an existing work order. These parts display red in search results.
 - **Q** – Quote. This part is already on an existing quote. These parts display orange in search results.
 - **D** – Deleted. This status only appears in systems that are configured to have all part deletions reviewed by a manager before the part is removed from the system. **D** indicates that the part has been deleted but is still pending manager approval. These parts display red in search results.
 - **E** – eBay. This part is active on eBay. Click the button in the column to open the part's eBay listing in your internet browser. These parts display blue in search results.
 - **C** – Committed. This part has been sold on eBay, and needs an invoice. Click the button in the column to open the part's eBay listing in your internet browser. These parts display red in search results.
 - **X** – Expired. This part has expired or been cancelled from eBay. These parts display blue in search results.
 - **A** – Assembly. This part is part of an assembly table. These parts display green in search results.
- **Miles** – Vehicle miles
- **ARADamage** – Part damage code
- **Cat** – Part category (Yard, Warehouse, Unbolted)
- **Stock** – Stock number
- **VIN** – Vehicle identification number
- **Location** – Part location
- **DIS** – Days In Stock
- **Interchange** – Interchange number
- **Part+Warranty** – Sale Price plus the price of the selected warranty
- **Cost** – Price you paid for this specific part. Normally this information will only be available for aftermarket parts.
- **PO Account** – For brokered parts on quotes, displays the account number of the account you're brokering the part from.
- **PO Name** – For brokered parts on quotes, displays the name of the account you're brokering the part from.
- **PO Price** – For brokered parts on quotes, displays the **Cost** amount you entered when creating the sale.
- **PO Department** – For brokered parts on quotes, displays the **Department** you selected when creating the sale.
- **Base Retail** – Retail price of the inventory record
- **Base Wholesale** – Wholesale price of the inventory record
- **Warranty Price** – Price of the selected warranty

- **Warranty Retail** – Price of the selected warranty, plus the Base Retail Price
- **Warranty Wholesale** – Price of the selected warranty, plus the Base Wholesale Price
- **Core Price** – Core charge the customer will be charged. This is determined by the Price Book. If you are a Coremate customer, this **Core Price** will display the price in the Coremate data or your Price Book core price, whichever is higher. Click this field to view/edit core information on the **Core Selection** window.
- **Core Status** – Status of this core. Click this field to view/edit core info on the **Core Selection** window.
 - **No Charge** – The customer will not be charged.
 - **Provided** – The customer has already provided the core.
 - **Due** – The core is still due from the customer.
- **Cond** – Condition information (entered when the part was inventoried). Display miles, units, or one of:
 - **CLEAR** – No condition
 - **000** – Zero damage
 - **NIB** – Negative information: B quality part
 - **NIC** or **NIQ** – Negative information: C quality part
 - **CORE** – Core part
 - **CHECK** – Needs to be checked
 - **UNKNWN** – Condition is unknown
- **Kind** – Part kind information (entered when the part was inventoried)
 - **U** – Used OEM
 - **S** – Surplus
 - **N** – New OEM
 - **0** – 0 miles OEM
 - **T** – New take off
 - **M** – Remanufactured
 - **R** – Rebuilt
 - **A** – Aftermarket
 - **K** – Used Aftermarket
 - **I** – Incomplete
 - **C** – Core
- **Yard** – The Checkmate yard this part is inventoried under
- **Private** – Indicates whether this part is private. (Private parts are not uploaded to online part listings and are only available in your Checkmate system.)
- **Review** – Indicates whether the part is in Review. (Parts can be flagged for Review in Checkmate, Partmate, or Photomate).
- **Checked** – Indicates the number of days since the part was last edited
- **Quantity** – Quantity on hand for this part/interchange number.
- **Freight Price** – Displays the price of the freight option chosen.
- **Freight Description** – Indicates the freight option currently applied to this part. Click this field to open the **Freight** window, where you can select a freight charge to apply to this part. The **Freight** window will only show freight options that are available for this part type, based on your Checkmate configuration.
- **Pallet Price** – Displays the price of the pallet option chosen.
- **Pallet Description** – Indicates the pallet option currently applied to this part. Click this field to open the **Pallet** window, where you can select a pallet charge to apply to this part. For more information about adding a pallet charge, see **Appendix B: Pop-Up Windows**.
- **Tag** – Part's tag number
- **Images** – A camera icon in this column indicates that this part has images associated with it
- **Price Updated** – Date the part's retail or wholesale price was last updated
- **Part Name** – Full part name.

- **Model Name** – Full model name

Appendix B: Pop-Up Windows

This appendix describes various pop-up windows that are accessed from several places throughout Checkmate Sales Pro.

Applying a Warranty

If you have warranties set up*, you can apply warranties to parts in Sales Pro. You can do this in multiple places:

- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting to an invoice

To apply a warranty to a part:

1. Click the **Warranty Description** or **Warranty Price** button for the appropriate part.

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Discount %	Tax %				
				FRANK	08/22/2019	10/02/2019	08/27/2019	10/11/2019		7				
<input checked="" type="checkbox"/> Sell	Description	Total Price	Sale Price	Tax	Total Retail	Total Wholesale	Warranty Price	Warranty Description	Stock	Pallet Price	Pallet Description	Location	Interchan	Department
1 - Remove	<input checked="" type="checkbox"/> 2.4L (V/N B, 5th digit, 2AZF...	\$664.01	\$330.92	Yes	\$333.09	\$333.09	\$83.09	WTY 0-499 6MOS PA...	56133	\$75.00	ENGINE PALLET	STAGING	65835	USED PART S...

2. The **Select Warranty** window opens displaying the warranty options you have set up. Click to select the desired warranty option.

Line Item # 1 : Select Warranty

<p>\$0-\$149 6MOS PARTS NO LABOR \$150-\$249 6MOS PARTS NO LABOR \$150-\$249 12MOS PARTS NO LABOR \$250 & UP 6MOS PARTS NO LABOR \$250 & UP 12MOS PARTS NO LABOR CUSTOMER DECLINED EXT WARRANTY</p>	<p>Sale Price : \$50.49 Warranty Price : \$0.00 Total Price : \$50.49</p> <p>Labor Amount : NA Part Amount : NA Warranty Days : NA</p>	<p><input checked="" type="button" value="Accept"/> <input type="button" value="Cancel"/></p>
--	--	--

3. Click **Accept** to save your changes.
 - If you're applying the warranty on the **Parts** tab, the warranty you select for this part will be temporarily applied to all parts in your search results with the same interchange number. The warranty selection will be reset for these parts when you start a new search.

* You can set up warranties in Checkmate Retro using the **Warranty Configuration** function (Checkmate Full: **6,10,11**.
 Checkmate Classic: **S3,12**)

Editing the Sale Price

You can edit the **Sale Price** for a part in several places in Sales Pro

- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting the work order to an invoice.

To edit the **Sale Price** for a part:

1. Click the **Sale Price** button for the appropriate part.

Order Date	Ship Date	Due Date	Ordering	Customer PO	Dismantler	Core	R/O #	Truck	Sales Person	Discount %	Tax %				
10/02/2019	10/02/2019	10/02/2019						TRUCK1	FRANK	10	6				
Model	Description	Total Price	Sale Price	Discounted	Tax	Total Retail	Total Wholesale	Warranty Price	Warranty Description	Pallet Price	Pallet Description	Stock	Interchange	Department	Interchange
1 - Remove	ALTMA ALTMA-AUTO 10 Int.51622	\$450.62	\$450.62	No	Yes	\$450.62	\$450.62	\$0.00		\$0.00		140609	51622	USED PART SA.	(AUTC
EPA - Remove		\$3.00	\$3.00	No	No	\$0.00	\$0.00							USED PART SA.	

2. The **Sale for Line Item** window opens. From here, you can:

- Click the **Original Price**, **Retail Price**, or **Whole Sale Price** button to enter that amount in the **New Sales Price** field.
- Manually enter a **New Sales Price**.

- If you're editing a price on a quote or work order, a button displays below the **New Sales Price** field. Click the button to toggle it between these options:

Sales Price

Sales Price – The price shown in the **New Sales Price** field will be the price of the part only. Tax amounts will be additional.

Sales Price w/Tax

Sales Price w/ Tax – The price shown in the **New Sales Price w/ Tax** field is the amount for the part and the tax. This reduces the amount of the part price so that the amount of the part plus the tax equals what is displayed in this field.

3. Click **Accept** to save these changes and return to the search results.

- If you change the price on a work order, the **Reason for change** window displays. Select an option and click **Accept** to complete the change.

Note: If you have basic salesperson privileges*, you may be prompted to enter an owner's/supervisor's password if you attempt to reduce the **Sale Price** to an amount that is lower than the retail and wholesale price.

* This setting is configured in Checkmate Retro's **Change Password** function (Checkmate Full: **6,10,4**. Checkmate Classic: **S3,4**.)

Adding/Editing a Core

The **Core Selection** window allows you to add/edit cores for a part. You can add a core:

- **Parts** tab, before creating a sale
- **Quotes** tab, before promoting it to a work order

To add or edit a core:

1. Open the **Core Selection** window.
 - On the **Parts** tab, click either the **Core Price** or **Core Status** fields for the appropriate part.

Part	Year	Model	Grade	Description	Interchange Des	Sale Pri	Total R	Total W	Warranty Desc	Status	Miles	Core Price	Core Status
1 - Extra\$	ENG	2010	CAMRY		2.5L, <VIN F, 5th digit,	\$0.00	\$0.00	\$0.00	CUSTOMER DECLI...			\$0.00	
2	ENG	2011	CAMRY	B	RAN,2.5L, <VIN	\$800.07	\$800.07	\$800.07	CUSTOMER DECLI...		147000	\$0.00	
3	ENG	2010	CAMRY	B	lookupper pan	\$300.00	\$300.00	\$300.00	CUSTOMER DECLI...		178000	\$0.00	
4	ENG	2010	CAMRY	B	RAN,2.5L, <VIN	\$800.07	\$800.07	\$800.07	CUSTOMER DECLI...		173000	\$0.00	

- On the **Quotes** tab, click any of the **Core**, **Core Amt**, or **Core Tax** fields for the appropriate part.

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Discount %	Tax %								
				FRANK	07/31/2019	07/31/2019	08/05/2019	09/19/2019		7								
Part	Interch	Part Name	Year	Model	Total Price	Sale Price	Tax	Total Ret	Core	Core Amt	Core Tax	Warranty Des	Stock	Location	Part+Warr	Base Retail	Base Whol	Warranty Price
1 - Remove	ALT	S0154A ALTERNATOR	2008	CAMRY	\$100.00	\$100.00	Yes	\$100.00	\$0.00	\$0.00	Yes	CUSTOMER	KCK18	KENTUCKY	\$100.00	\$100.00	\$101.00	\$0.00
EPA - Remove	EPA	E.P.A. CHARGE			\$3.00	\$3.00	No	\$0.00							\$3.00	\$0.00	\$0.00	

2. The **Core Selection** window displays. Select a **Core Status**.
 - If you're adding a **Core-Due**, several features help you set the **Core Price**.
 - The Price Book's core price for this interchange number displays in the **IC Core Price:** field. Double-click it to set it as the **Core Price**.
 - Use the **Tax** field to specify whether tax should be charged on the core.
 - For Advanced Bidmate subscribers, core buyer information displays in the top of the window for reference. Double-click an amount in the **Price** column to set that amount as the **Core Price**.

Buyer	Price	Description	Source
G-Cor	\$		Core Pricing
MCI	\$		Core Pricing
Phoenix	\$		Core Pricing

Core Status Core-No Charge Core-Provided Core-Due No Core Status	Core Price \$ Tax Yes IC Core Price : \$25.00 Total Price : \$135.00	Accept Cancel
--	--	------------------

3. Click **Accept** to save your changes.

- If you're adding a core to a part on the **Parts** tab, the core option will be temporarily set for all parts in your search results that have the same interchange number. This will reset when you start a new search.
- On the **Quotes** tab, **Work Order/Invoice** tab, and **Credits/Returns** tab, core due and core credit amounts display in the **Cores** subtotal field.

Parts	\$103.00	Selected Part JOHN CUSTOMER					
Warranty	\$0.00	Quote	Date	Customer	SLS	Price	Grade
Cores	\$35.00	47541	08/09/19	JOHN	F	\$100.00	A
Freight	\$0.00	Tax Freight Yes ▾					
Est. Tax	\$9.45						
Total	\$147.45						
Payment	Cash ▾						
Promote All to WO		Print Quote					

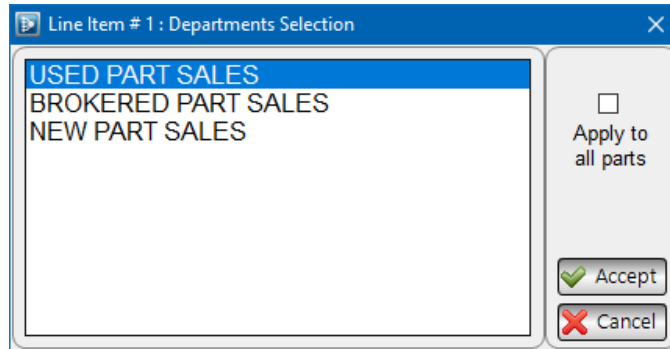
Selecting the Part Department

You can change a part's department on quotes and on work orders before they're promoted to an invoice. To do so:

1. Click the **Department** button for the appropriate part.

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Discount %	Tax %						
				FRANK	08/22/2019	10/03/2019	08/27/2019	10/11/2019		7						
	Sell	Part	Year	Model	Description	Total Price	Sale Price	Tax	Department	Total Retail	Total Wholesale	Warranty Price	Warranty Description	Stock	Pallet Price	Pallet Description
1 - Remove	<input checked="" type="checkbox"/>	ENG	2011	CAMRY	2.4L (VIN 8, 5th digit, 2AZF...	\$498.00	\$180.00	Yes	USED PART S...	\$318.00	\$318.00	\$68.00	WTY 0-499 6MOS PA...	456133	\$75.00	ENGINE PALLET

2. The **Departments Selection** window displays. Click to select the part's department.
 - Optional: You can apply the selected department to all parts on the quote or work order by checking the **Apply to all parts** checkbox.



3. Click **Accept**.

Adding/Editing Freight

You can add/edit freight charges for a part in several places in Sales Pro

- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting the work order to an invoice

To add/edit a freight charge for a part:

1. Click the **Freight Description** button for the appropriate part.

Find	Interchange	Parts	Quotes	Work Order / Invoice	POs	Credits / Returns											
All Parts (60)	My Parts (49)	Extra Sales (1)	Resolution Parts (1)	Exchange Parts (0)	Alternative Vehicles (0)	Alternative Parts (0)	Save/Load Filters										
<input type="checkbox"/>	Part	Year	Model	Interchange	Description	Interchange Description	Sale Price	Total Ret.	Total	Sta	Freight Price	Freight Description	Miles	ARADan	Cat	Stock	
<input type="checkbox"/>	1 - Extras	ENG	2015	CAMRY	X	2.5L VIN F (5th digit, 2ARFE)	2.5L VIN F (5th digit, 2ARFE engine, 4 c	\$0.00	\$125.00	\$125.00		\$0.00				Y	LKJ876
<input type="checkbox"/>	2	ENG	2012	CAMRY	X	2.5L VIN F (5th digit, 2ARFE)	2.5L VIN F (5th digit, 2ARFE engine, 4 c	\$1,550.81	\$1,875.81	\$1,875.81		\$0.00				ND	TURTLE123
<input type="checkbox"/>	3	ENG	2015	CAMRY	A	2.5L VIN F (5th digit, 2ARFE)	2.5L VIN F (5th digit, 2ARFE engine, 4 c	\$2,000.00	\$2,125.00	\$2,125.47		\$0.00					CLAW8147
<input type="checkbox"/>	4	ENG	2015	CAMRY	X	2.5L VIN F (5th digit, 2ARFE)	2.5L VIN F (5th digit, 2ARFE engine, 4 c	\$1,750.81	\$1,875.81	\$1,875.81		\$0.00					

2. The **Freight** window opens, displaying the freight options you have set up*. Click to select the desired freight option.

- If desired, you can manually enter a **New Freight Price**.

- If you are configured to charge tax on freight, a button displays below the **New Freight Price** field. Click it to toggle between these options:

Do NOT Combine

Do NOT Combine – The freight amount will not be combined with the part price on printed work orders/invoices.

Combine with Sale

Combine with Sale – The freight amount will be combined with the part price on printed work orders/invoices.

3. Click **Accept** to save these changes.

- If you're adding a freight charge to a part on the **Parts** tab, the freight option will be temporarily set for all parts in your search results that have the same interchange number. This will reset when you start a new search.

* Freight options are configured in Checkmate Retro's **Setup Shipping Table** function: (Checkmate Full: **6,26,1**.)

Checkmate Classic: **S21,1.**)

Editing an Automatic Charge

If you have an automatic charge set up*, this will be included on quotes, work orders, and invoices. The charge will show in the last line, with the charge **Code** displayed on the **Remove** button. You can edit/remove the charge on quotes and work orders.

- Click **Remove** to remove the automatic charge.
- Click the **Sale Price**, **Tax**, or **Department** buttons to edit the charge.

JOHN CUSTOMER 555-555-5555 CREDIT LIMIT : \$2000 AVAILABLE \$2000

Find Interchange Parts Quotes Work Order / Invoice POs Credits / Returns

Customer Information: JOHN CUSTOMER, 123 FIXERUP RD., ANYTOWN, KY 41017, 555-555-5555

Ship To: JOHN CUSTOMER, 123 FIXERUP RD., ANYTOWN, KY 41017, 555-555-5555

Quote 999-48048 Status Active

Truck	PO	Claim	Department	Sales Person	Date Quoted	Last Worked	Call Back	Expires	Discount %	Tax %					
				FRANK	09/04/2019	09/04/2019	09/09/2019	10/24/2019		7					
	Sell	Part	Images	Interchan	Year	Model	Total Price	Sale Price	Tax	Department	Total Retail	Core	Core Amt	Core Tax	Discount
1 - Remove	<input type="checkbox"/>	501728 FEN-RH		50246	2009	CAMRY	\$100.00	\$100.00	Yes	USED PART SALES	\$100.00		\$0.00	Yes	Yes
2 - Remove	<input type="checkbox"/>	HLP-RH		59864	2010	CAMRY	\$100.00	\$100.00	Yes	USED PART SALES	\$0.00		\$0.00	Yes	Yes
EPA - Remove	<input type="checkbox"/>	EPA					\$3.00	\$3.00	No	USED PART SALES	\$0.00		\$0.00		No

* Automatic charges are set up in Checkmate Retro using the **Change Invoicing** function: (Checkmate Full: **6,10,1**. Checkmate Classic: **S3,1**).

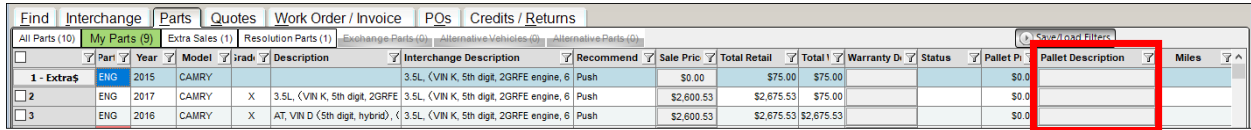
Adding a Pallet Charge

If you have pallet charges set up*, you can add a pallet charge for a part in Sales Pro: You can do this:

- On the **Parts** tab, before creating a sale
- On the **Quotes** tab and on the **Work Order/Invoice** tab, before promoting a work order to an invoice.

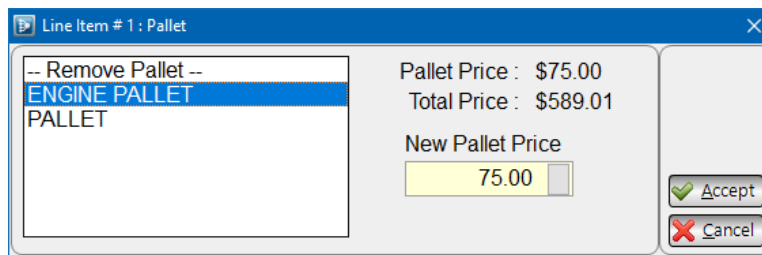
To add a pallet charge:

1. Click the **Pallet Description** button for the appropriate part.



Find	Interchange	Parts	Quotes	Work Order / Invoice	POs	Credits / Returns	Save and Filter									
Part	Year	Model	Interchange	Description	Interchange Description	Recommend	Sale Price	Total Retail	Total	Warranty D	Status	Pallet Price	Pallet Description	Miles		
1 - Extras	ENG	2015	CAMRY	X	3.5L (VIN K, 5th digit, 2GRFE engine, 6	3.5L (VIN K, 5th digit, 2GRFE engine, 6	Push	\$0.00	\$75.00	\$75.00		\$0.00				
2	ENG	2017	CAMRY	X	3.5L (VIN K, 5th digit, 2GRFE engine, 6	3.5L (VIN K, 5th digit, 2GRFE engine, 6	Push	\$2,600.53	\$2,675.53	\$75.00		\$0.00				
3	ENG	2016	CAMRY	X	AT, VIN D (5th digit, hybrid), <	3.5L (VIN K, 5th digit, 2GRFE engine, 6	Push	\$2,600.53	\$2,675.53	\$2,675.53		\$0.00				

2. The **Line Item: Pallet** window appears, displaying the pallet charges you have set up. Select the charge you want to add.



Line Item # 1: Pallet

-- Remove Pallet --

ENGINE PALLET
PALLET

Pallet Price : \$75.00
Total Price : \$589.01

New Pallet Price
75.00

Accept
Cancel

3. Edit the amount if desired, and then click **Accept** to add the charge.
 - If you're adding a pallet charge on the **Parts** tab, the pallet charge will be set temporarily for all parts in your search results that have the same interchange number. This will reset when the search results are cleared.

* Pallet charges are set up in Checkmate Retro using the **Pallet Charges** function: (Checkmate Full: **6,27**. Checkmate Classic: **S22**)

Getting Help

For more information about this product, including access to online training videos and documentation, visit Products.Car-Part.com for our recycler resources.

Car-Part.com takes customer service seriously. We have a variety of support options available to help you if you have questions about our products or if you need help for any reason. Your questions are very important to us and we want your experience to be a positive one. Please contact us with any questions or concerns using any of the following methods.

Phone Support

If you have a question not covered in this guide, Car-Part.com offers phone support. Please call 859-344-1925 with your questions.

Online Support using Car-Part Messaging (iCPM)

Support technicians are available online using Car-Part Messaging (iCPM) support rooms. These technicians are available LIVE to help answer any questions you may have.

The support rooms are staffed Monday–Friday, 8:00AM–8:00 PM ET.

To enter an iCPM support room:

1. Double-click the **iCPM** icon on your desktop.



2. **Car-Part Messaging** opens.
3. Double-click the name of the **Support Room** from your bookmark list.
4. Type **HELP** and a brief explanation of your issue. A Car-Part.com support technician will answer and help with your issue.

Training

If you have ongoing training needs, Car-Part.com has a team of product training specialists to help you learn how to use our products quickly. If you are interested in product training, please call our training department at 859-344-1925 and a trainer in your area will call to schedule training.

Comments

We welcome your comments and suggestions concerning the content and organization of this guide as well as the accuracy and the usability of the instructions it contains. Email us at documentation@car-part.com. We're listening!

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