Checkmate®

Inventory Management System

Sales Pro

User Guide

Car-Part.com

Contents

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.

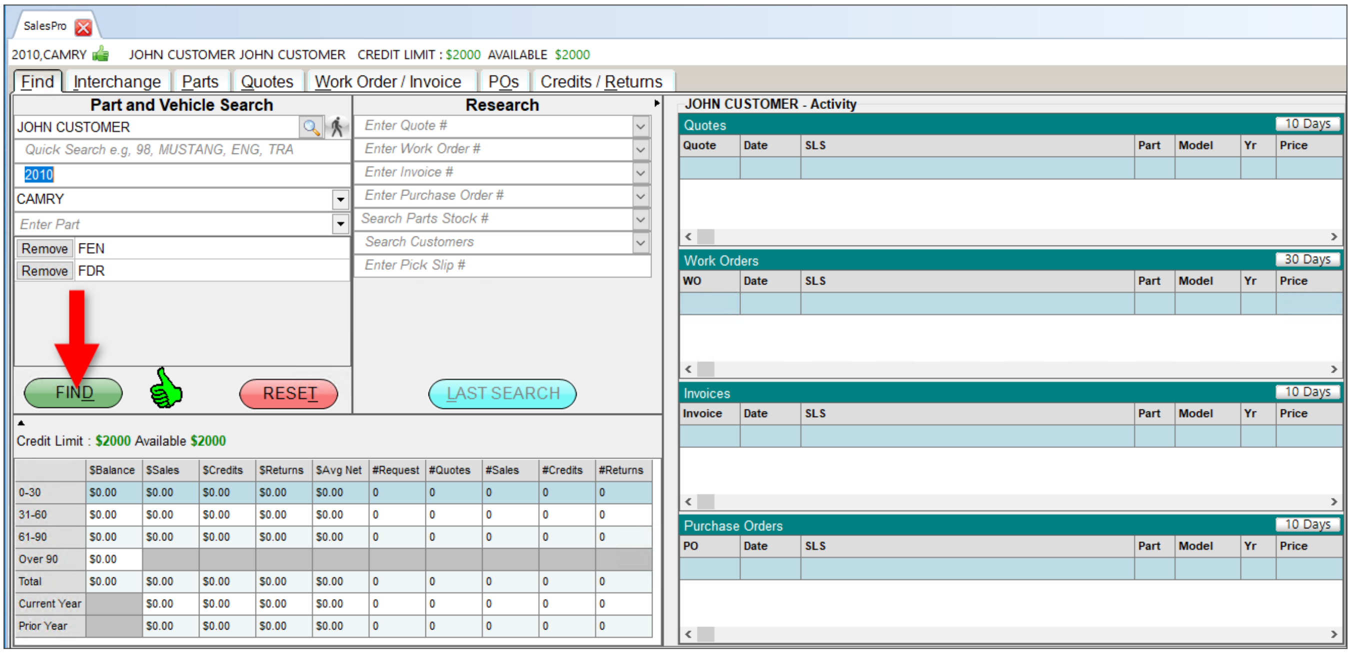
Common Workflows

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.

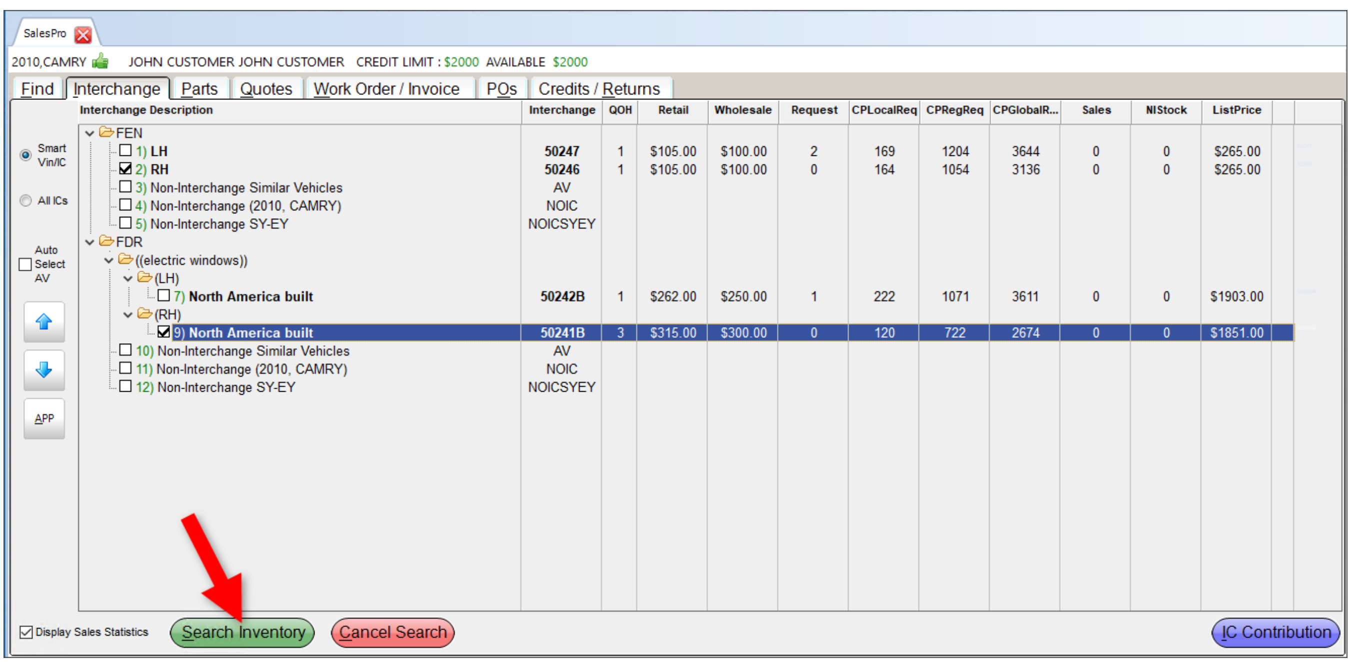
Selling Parts from Inventory

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

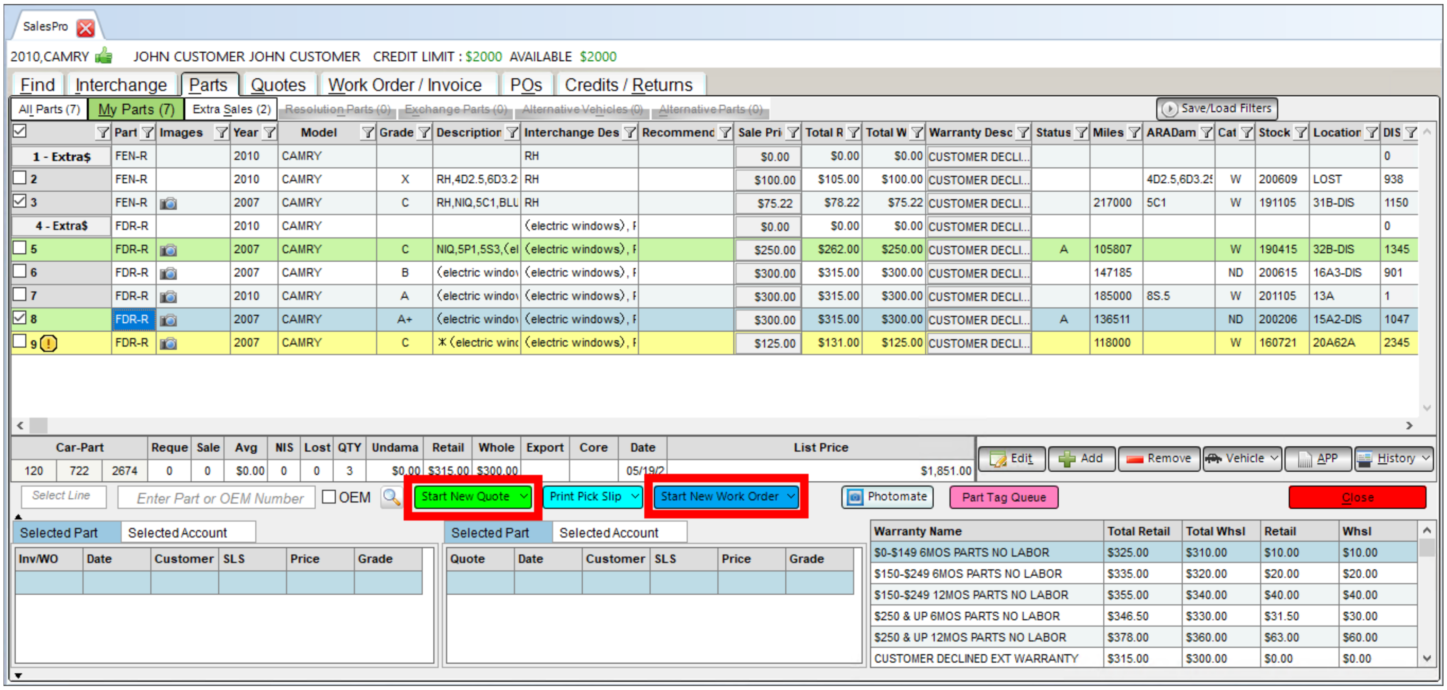
1. On the **Find** tab, enter the customer and part(s) you need to look up.
2. After you enter your search criteria, press **Enter** or click the green **Find** button.



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



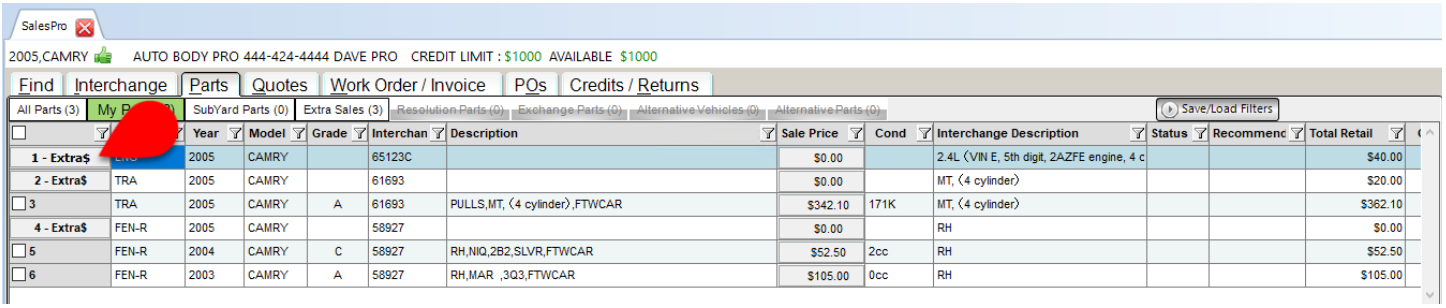
4. The **Parts** tab opens, displaying available parts. From the search results, check the part(s) you want to sell on the far left, and then click **Start New Quote** or **Start New Work Order**.



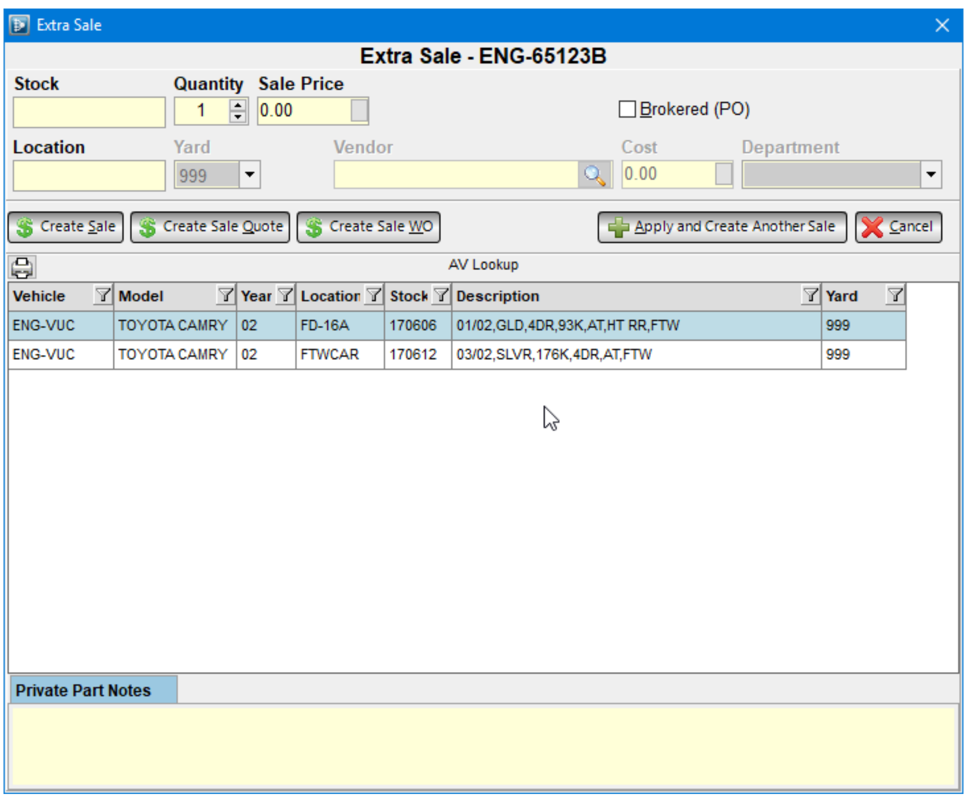
Selling Parts Not in Inventory

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.



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.
     - o 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.



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

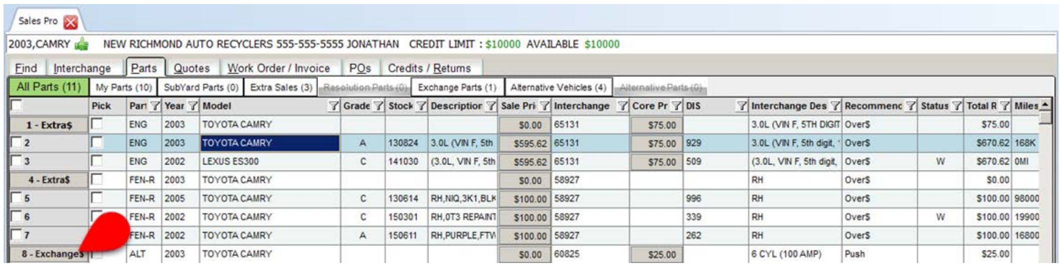
6. If you are brokering the part:
    a. Check the **Brokered (PO)** checkbox.
    b. Use the **Vendor** field to find the Vendor. Enter the vendor name or click the magnifying glass button to add a new customer account.
    c. Enter the **Cost** you are paying for this part. Click the blank box if you 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

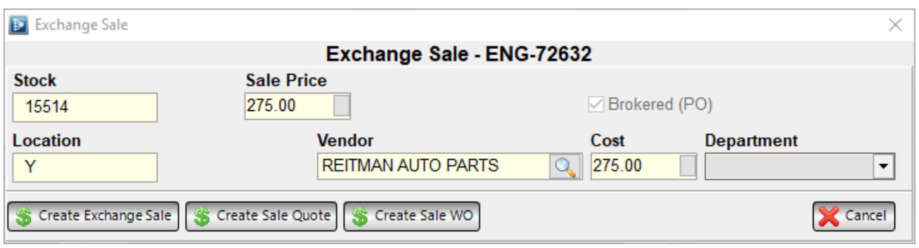
Exchange Sales in Sales Pro are for parts that you are selling through your Car-Part Exchange partners. (For more information, contact your sales rep.)

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.



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.



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.

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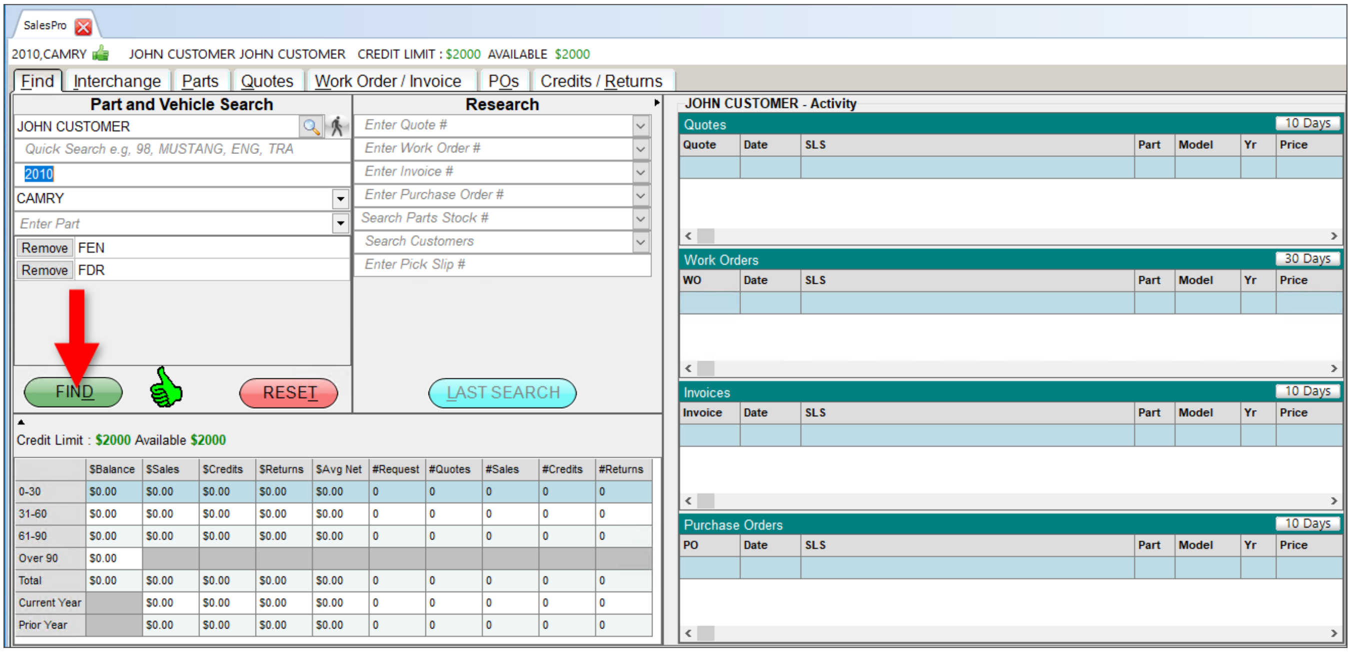
* Access this in Checkmate Retro (Checkmate Full: **5,12,21,2** or Classic: **V12,21,2** or Junior: **5,12,21,2**)

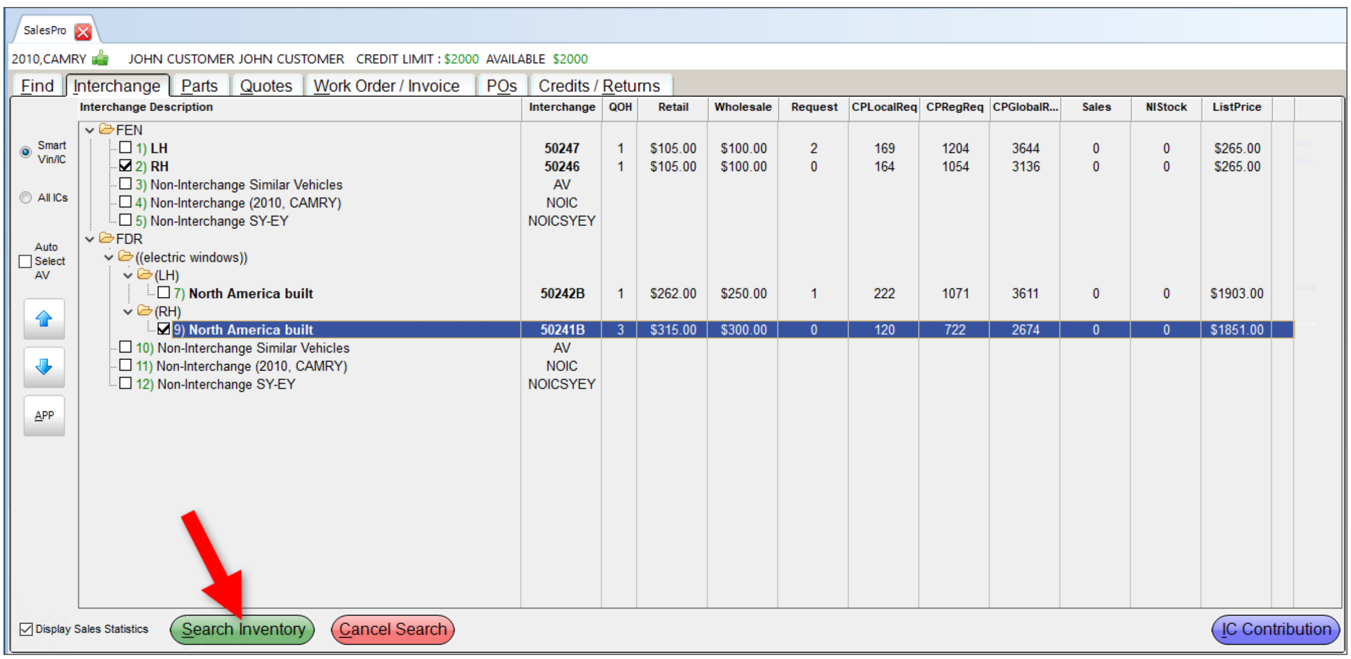
Quoting a Part

To start a new quote, follow these steps:

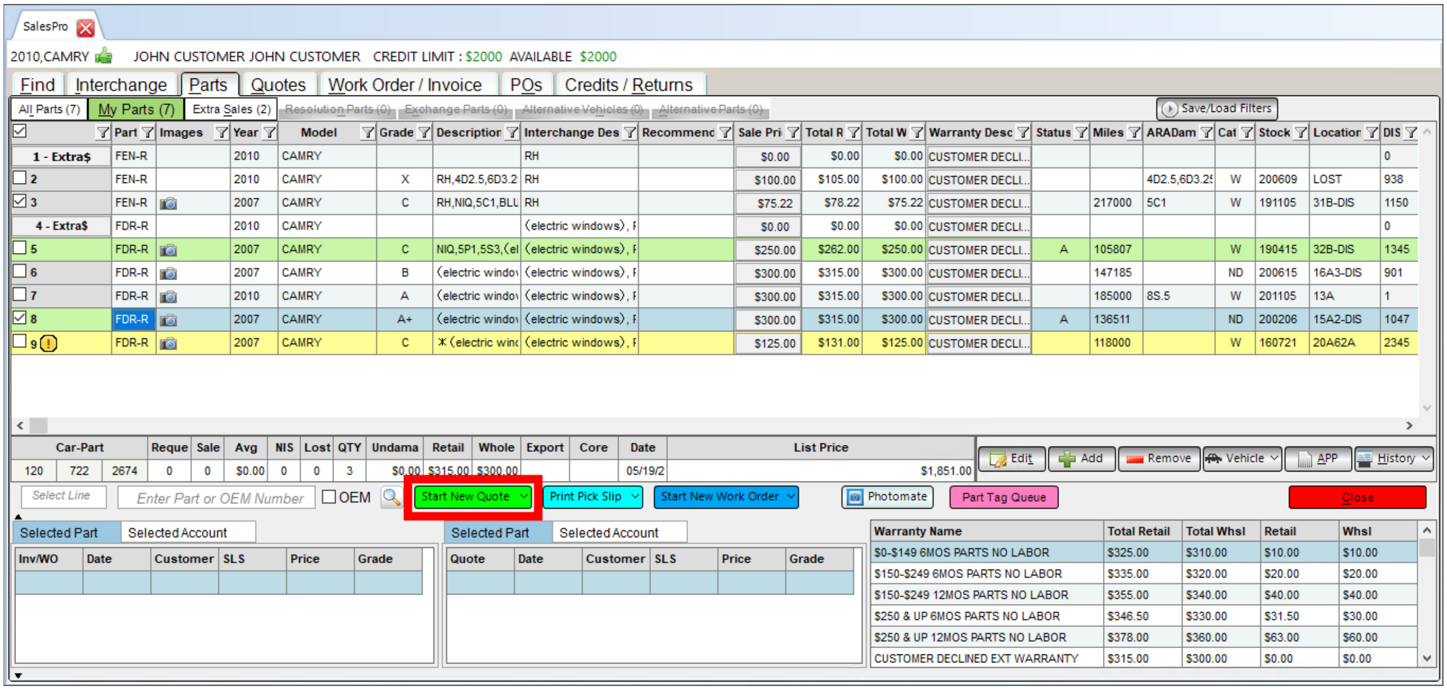
1. On the **Find** tab, enter the customer and part(s) you need to look up.
2. After you enter your search criteria, press **Enter** or click the green **Find** button.



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



4. 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**.

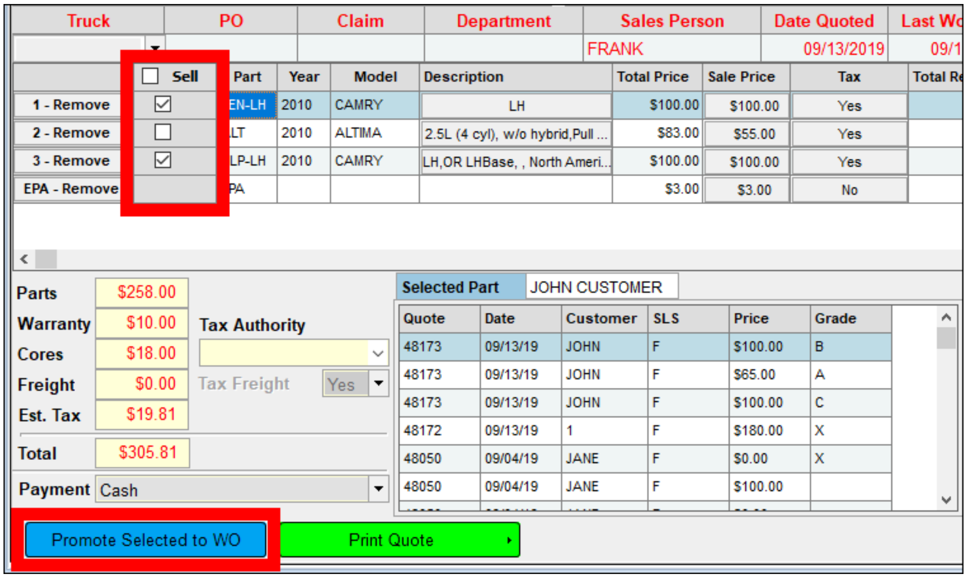


5. The **Quotes** tab opens. For more information about quoting parts, see the **Quote Parts (Quotes Tab)** section of this guide.

Selling Parts from a Quote

To sell parts from a quote, follow these steps:

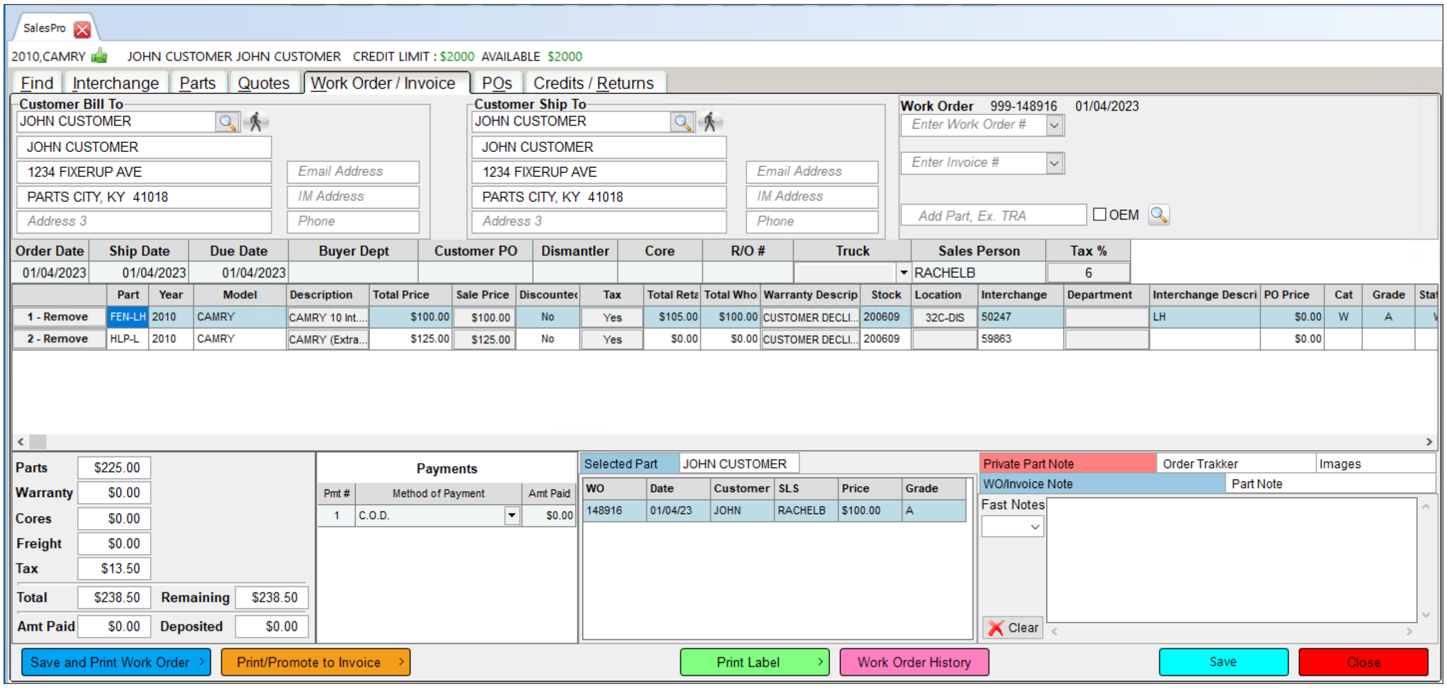
1. From the **Quotes** tab, use the **Sell** column to check which parts you want to sell.* By default, all parts are checked.
2. Click **Promote All to WO** (if all parts are checked) or **Promote Selected to WO** (if only some parts are checked). The parts are promoted to a work order.



⚠ **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.

3. 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.



4. 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.

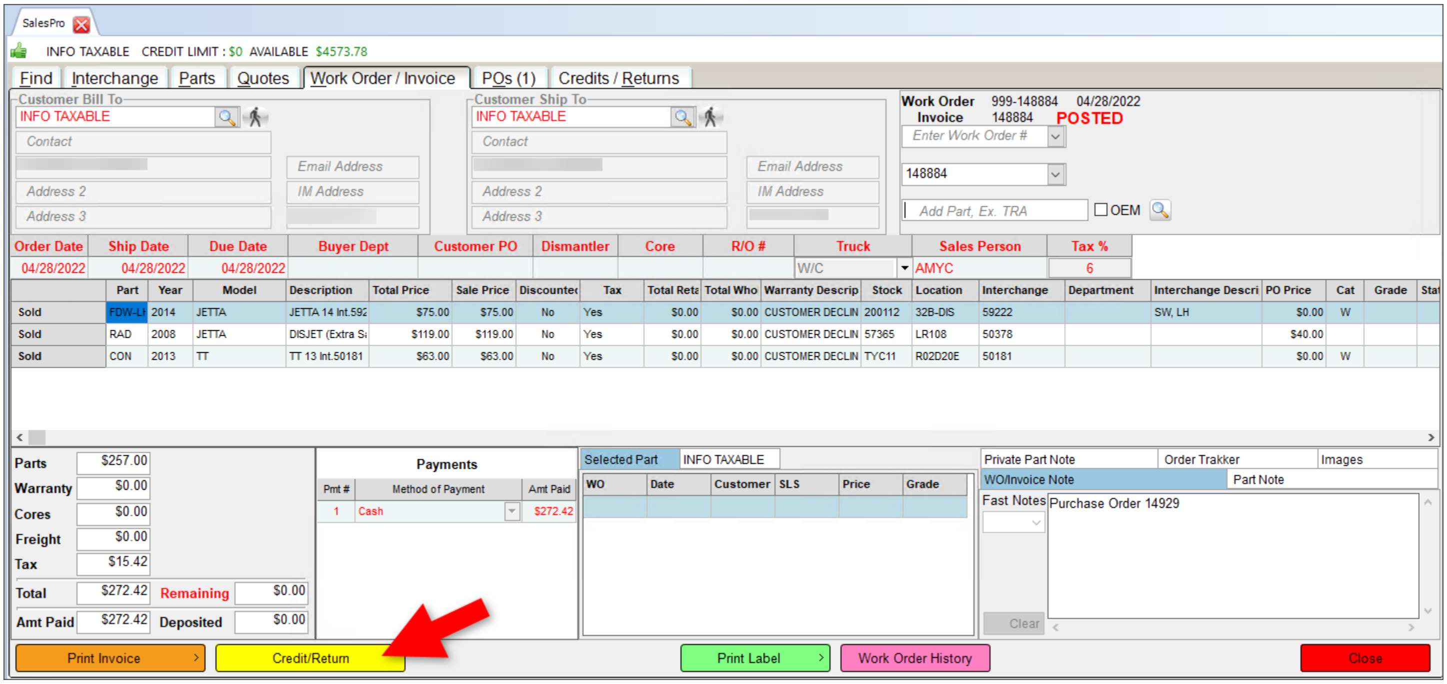
   - Click the **Work Order History** button to view the edit and print history for the work order on the **Work Order History** window.

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.

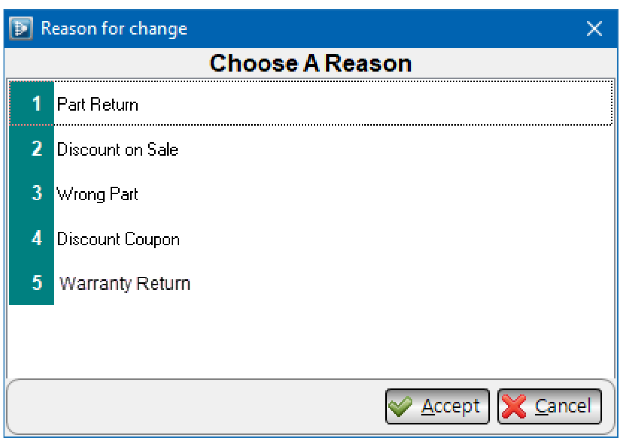
Crediting and Returning Parts

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.



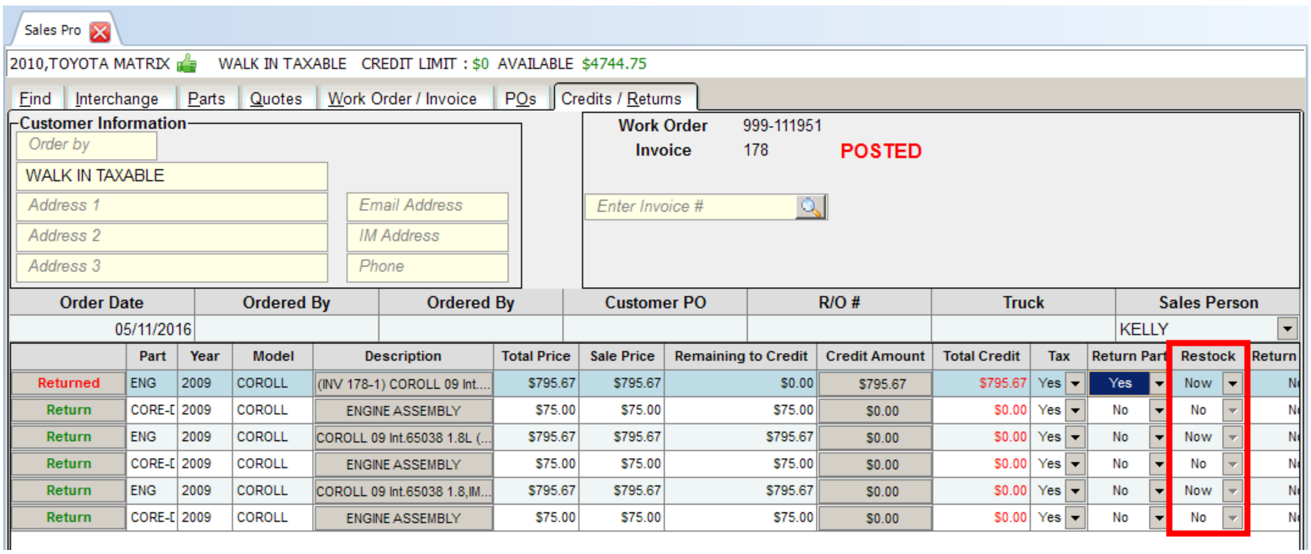
3. The **Credits/Returns** tab opens. Click the **Return** button next to each part you would like to credit or return, or use the **Return Part** drop-down. (Click the magenta **Select ALL for Return** button to select all parts on the invoice.)
4. The **Reason for change** window opens. Click to select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



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

   Using the drop-down in this column, select:

   - **Now**: restock now
   - **Later**: restock later (the part will be moved to the **restock file**†)
   - **No**: do not restock the part

- 

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

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

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

8. Checkmate Inventory Pro 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.

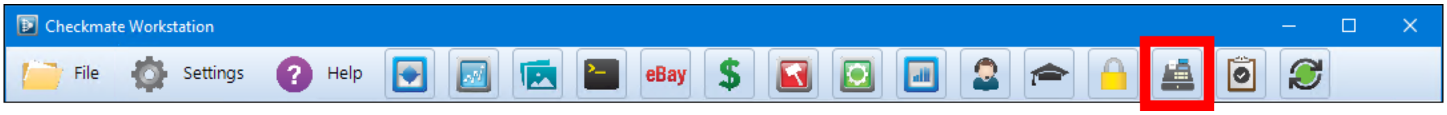
9. Click the save button.

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

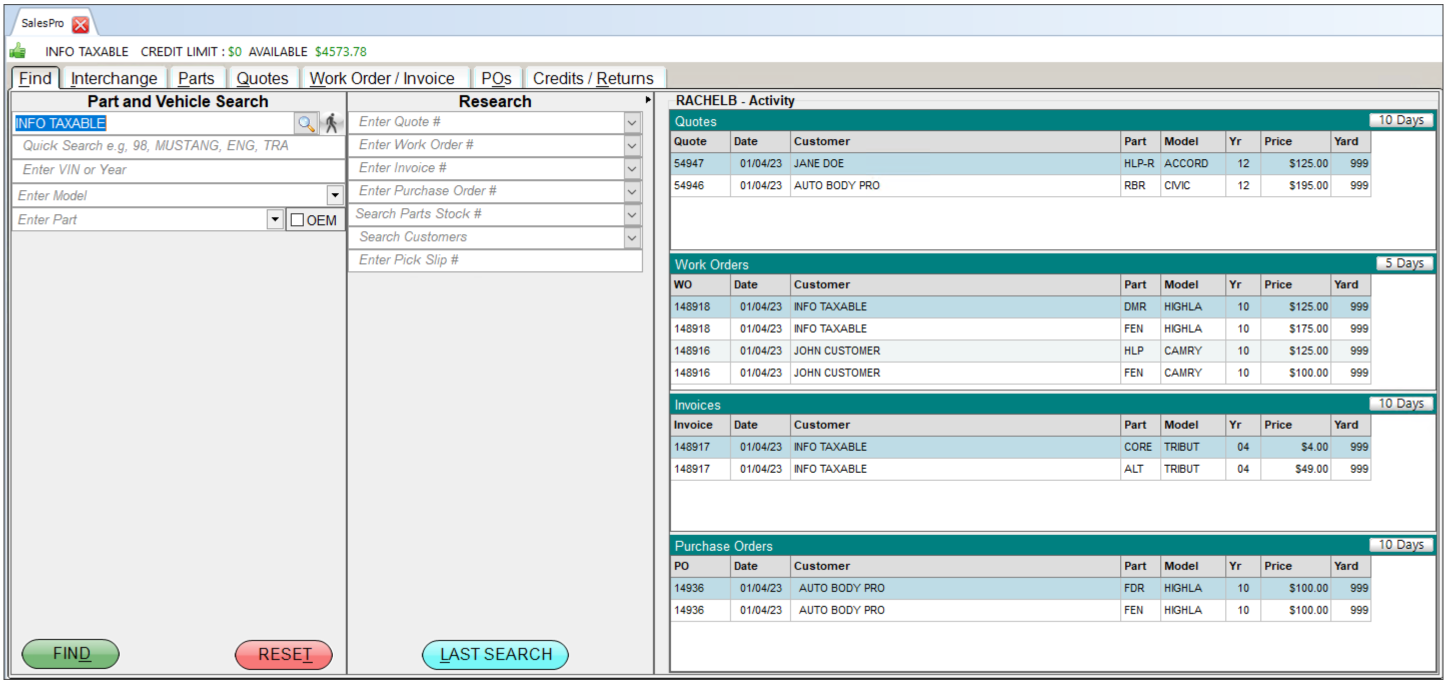
* If a part was an extra sale that didn't have an inventory record created, the **Restock** field will not be available.
† You can find the part to restock it later in Checkmate Inventory Pro using the **RESTOCK** View.

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.

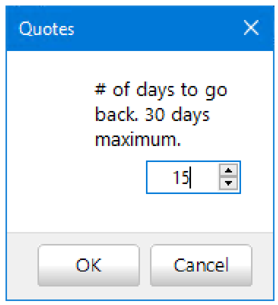


⚠ **Note:** You can configure Sales Pro to automatically open when you start Checkmate Workstation. Go to ***Settings>Workstation*** and select the **Tab Startup** tab to specify which tabs you want to open automatically.

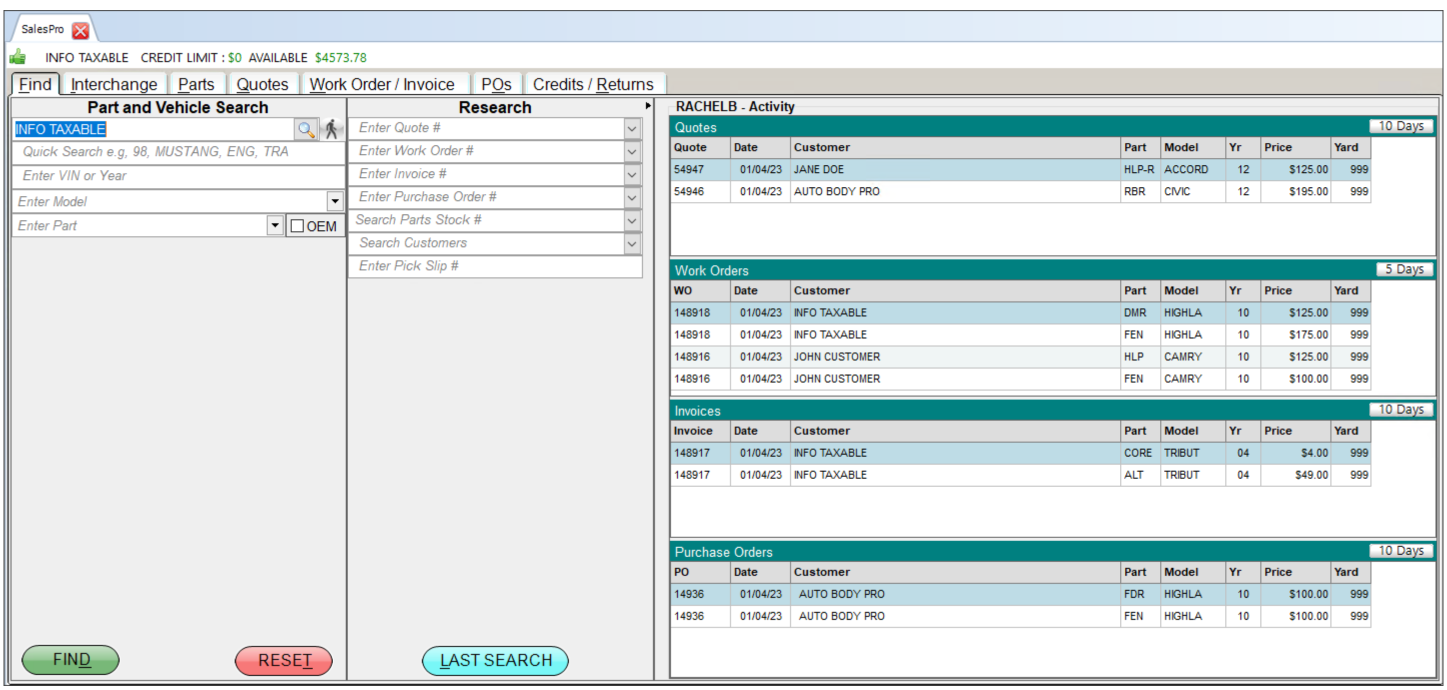
Find Customer and Parts (Find Tab)

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 recently 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:
  - Changing the number of days of activity that display. Click the **Days** button (5 Days) and in the window that appears, set the number of days you want to see for that activity, and then click **OK**.



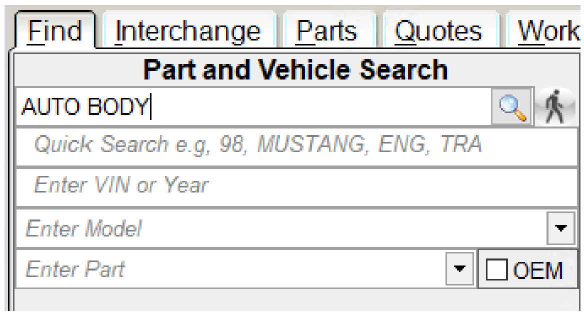
  - Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.
  - Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).



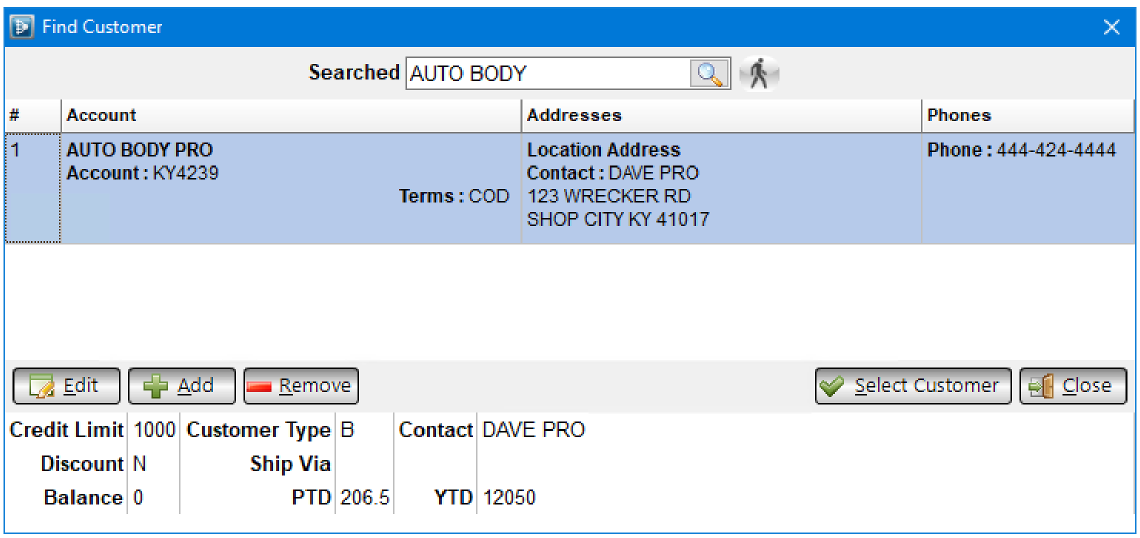
Find Customer

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.



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



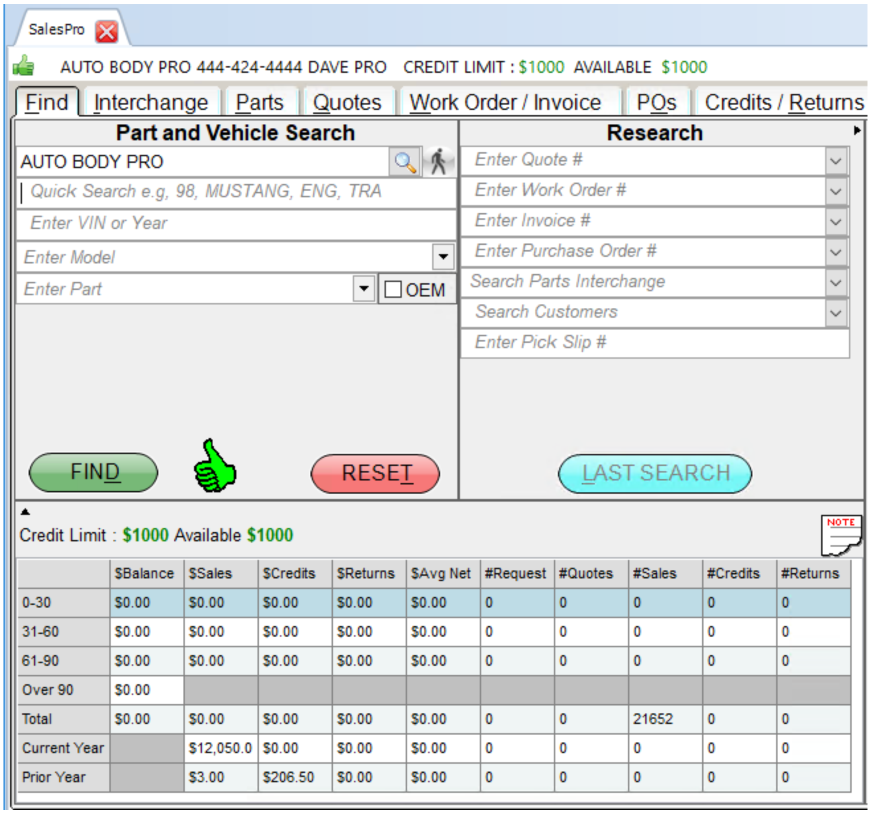
With the customer selected, click:

- **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)

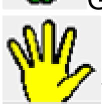
⚠ **Note**: You can perform a new search by entering a name in the **Searched** field at the top of the window and clicking the magnifying glass ( ) button. You can also click the **Walk-In** ( ) button to perform a part search for a walk-in customer.

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

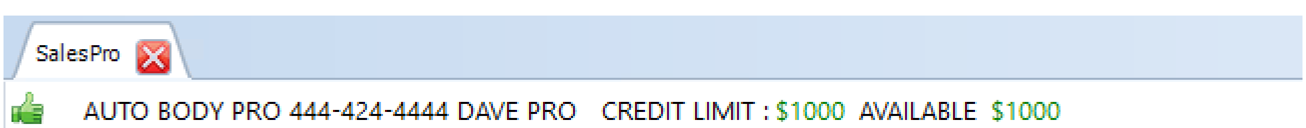
   The customer sales information in the **Part and Vehicle Search** section gives salespeople a quick overview of the customer's credit and recent activity.



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.

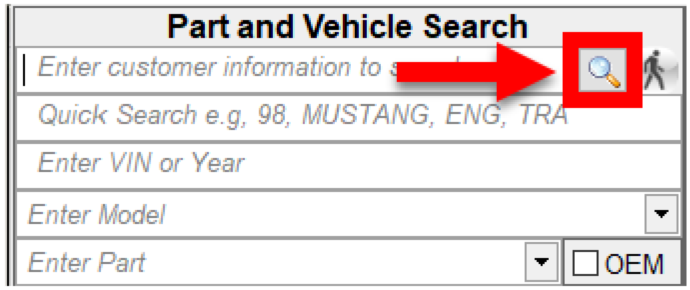
⚠ **Note**: If you search for a customer and then perform a part search, the customer information will "follow" you through the sales process. For example, if you find a part and begin to create a quote or a work order, the customer information will automatically be included in the quote/work order.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



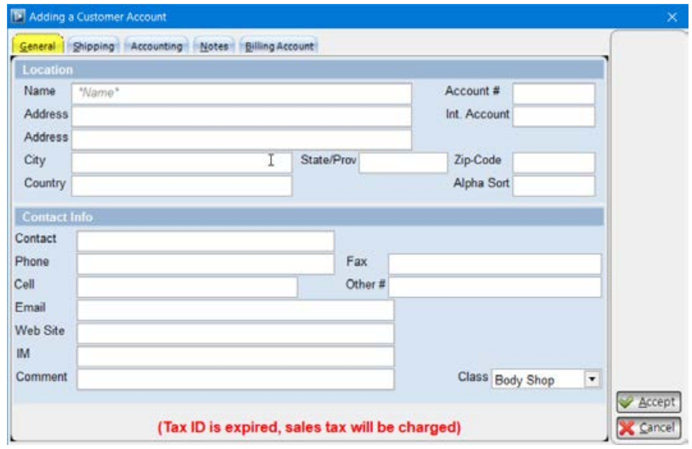
Add Customer

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.



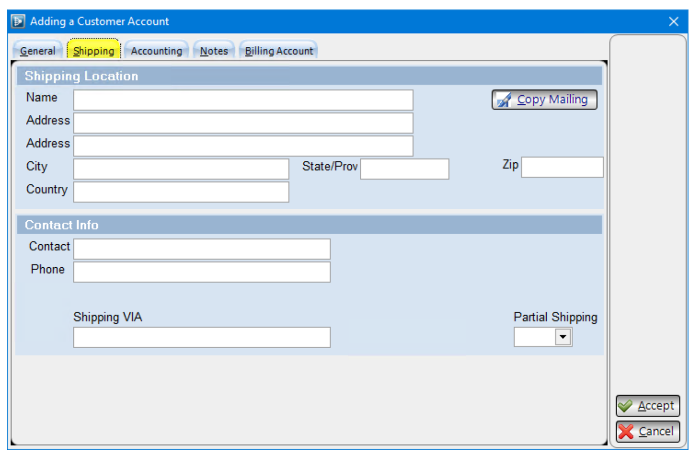
2. The **Adding a Customer Account** window opens. On the **General** tab, enter the customer's contact information.



   - **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.*

⚠ **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).

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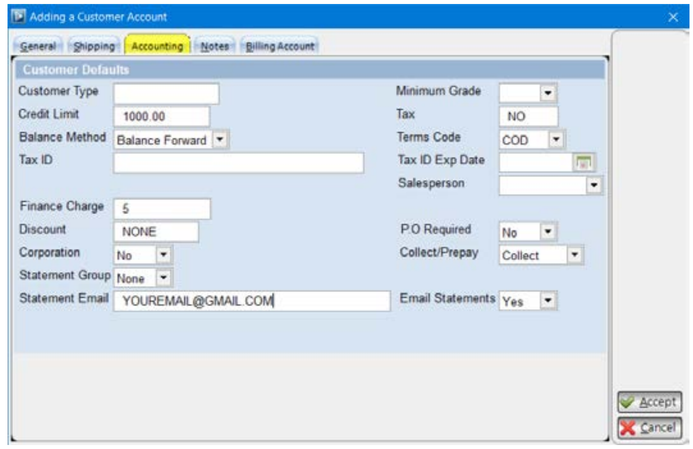
* You can disable this in Checkmate Retro: go to the **Change Accounts Receivable** function (Checkmate Full: **6,10,5** or Checkmate Classic: **S3,5** or Checkmate Junior: contact support), and enter **N** at the **Enable Abbreviated Entry** prompt.

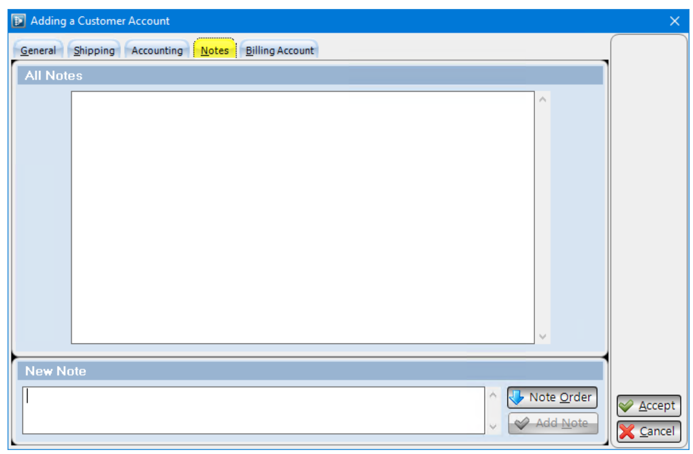
4. On the **Accounting** tab, enter accounting information for the customer. Some fields are filled in automatically using your system's **Account Defaults**[*].

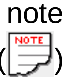


- If the customer wants to use a different email address than the main account **Email** on the **General** tab for email statements, type the address in the **Statement Email** field.

- If the customer wants to receive email statements, set the **Email Statements** field to **Yes** (account must have an email entered to access this field). The next time a statement is created for this customer in Checkmate Accounting, the **Email** box for this customer will be checked, and their **Email Address** will be set.
  For more information about emailing customer statements, refer to the Checkmate Accounting User Guide[†].

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 () 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**.

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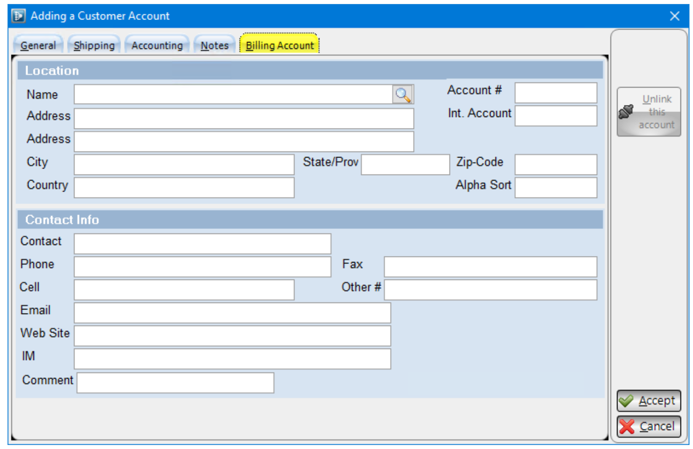
[*] You can change the **Account Defaults** by going to ***Settings>Yard Settings>* Account Defaults** tab.
[†] You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

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.

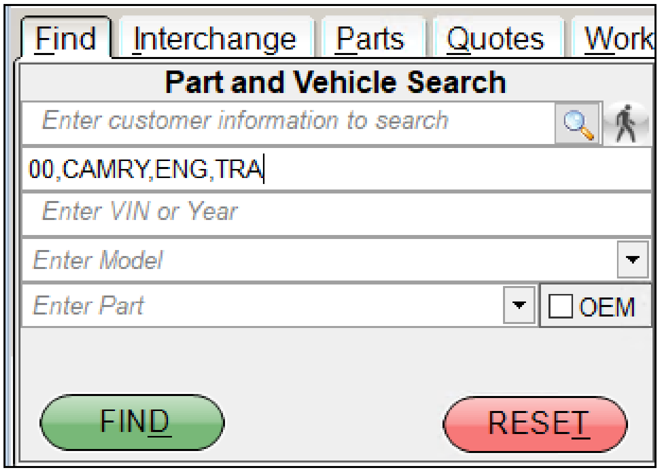


Find Parts

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

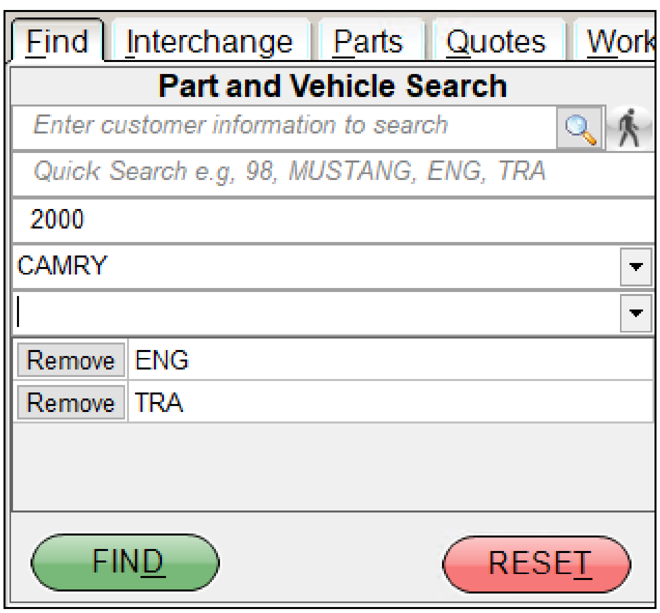
Quick Search

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.



Search by Year/Model/Part

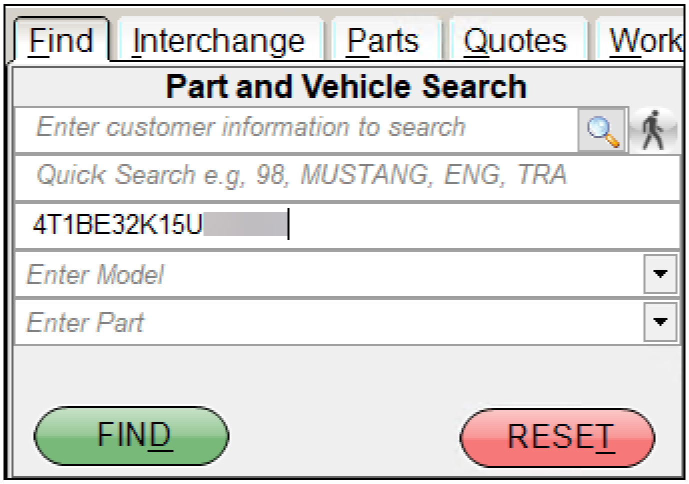
1. Enter Year, Model, and Part(s) in the appropriate fields.
2. After entering a part, press **Enter** to have the ability to add additional parts.
3. Press **Enter** or click the green **Find** button.
4. The **Interchange** tab opens with interchange options for these parts.



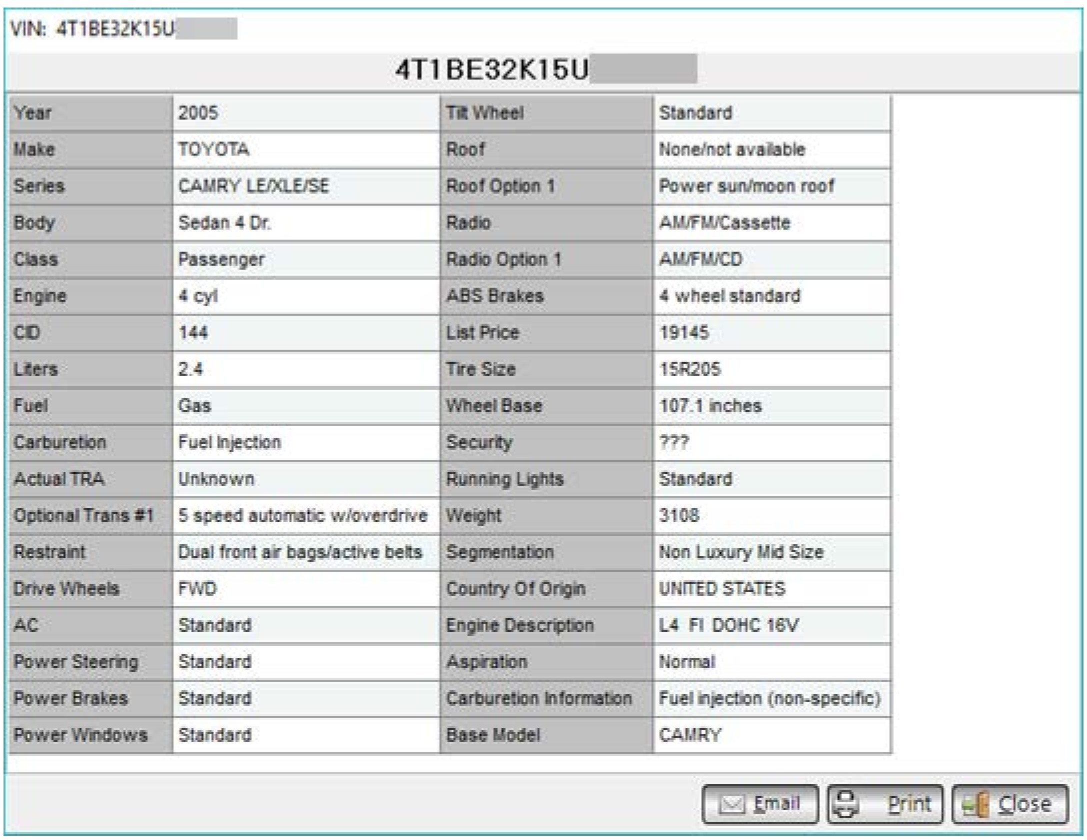
Search by VIN (recommended)

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.

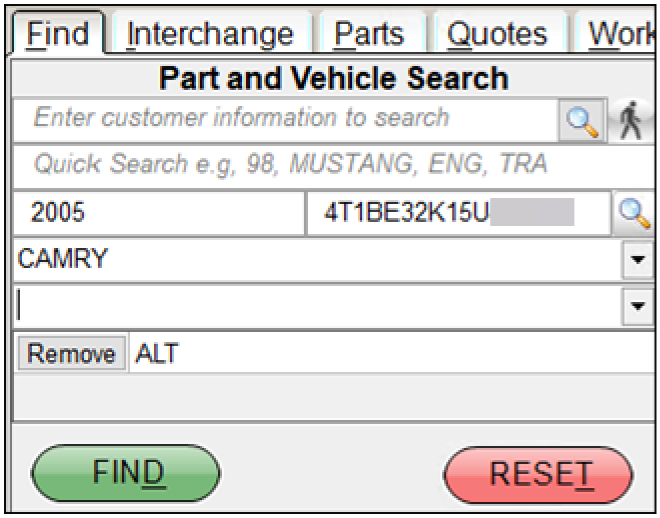

VIN: 4T1BE32K15U

4T1BE32K15U

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.)

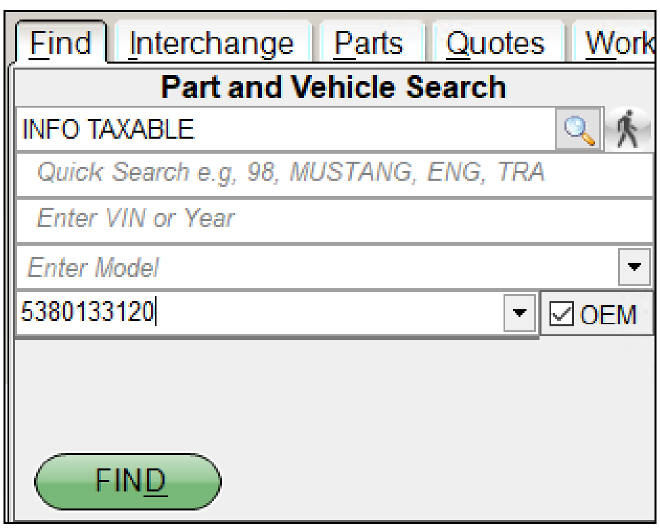


4. Click the green **Find** button.
5. The **Interchange** tab opens with interchange options for these parts.

⚠ **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.



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

Interchange Selection (Interchange Tab)

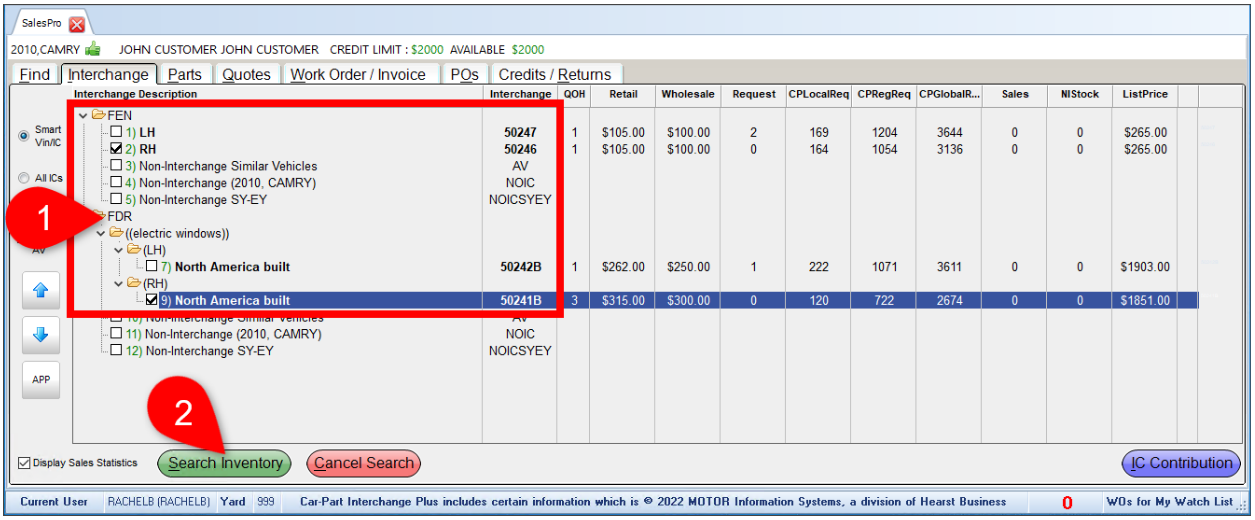
The second stage of finding a part is the **Interchange** tab. This tab displays the available interchange choices for the part(s) you are searching for as well as options to perform a non-interchange search. You can select both interchange and non-interchange search options in the same search.

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**.



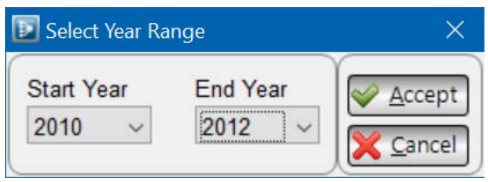
The **Parts** tab opens, displaying available parts.

Non-Interchange Search

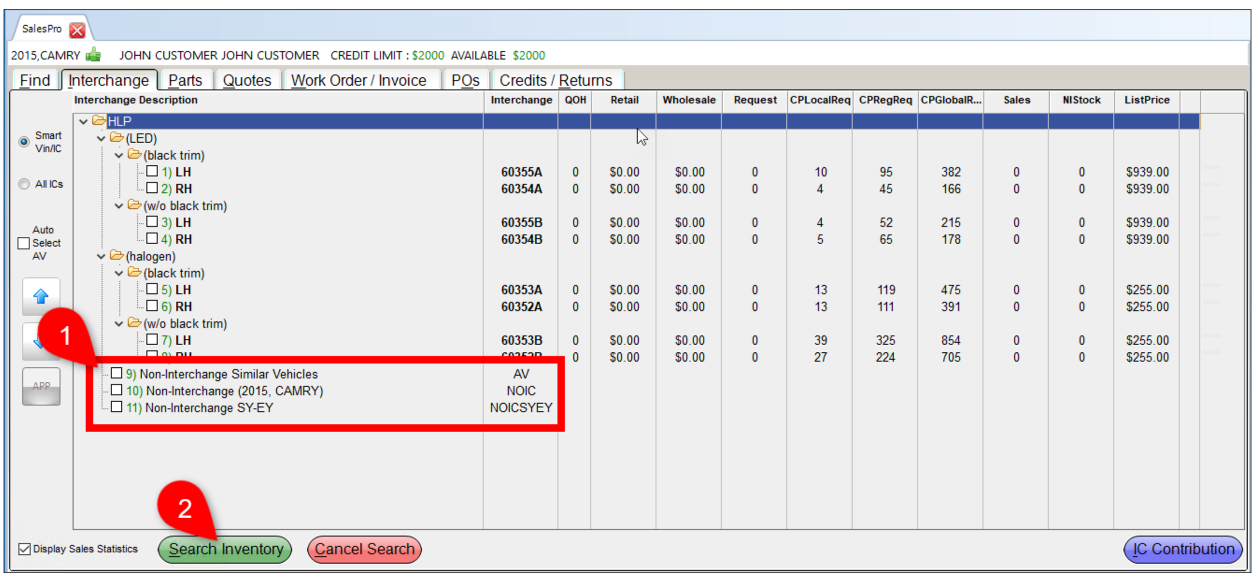
To search for parts without the help of interchange:

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.

      To keep this option checked (which automatically includes parts from Alternate Vehicles in future searches), click to check the **Auto Select AV** box. The **Non-Interchange Similar Vehicles (AV)** box will remain checked until the **Auto Select AV** box is unchecked.
    - **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**.



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



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

Customize Display

Manage your display by:

A. Selecting the interchange choices you would like to see:

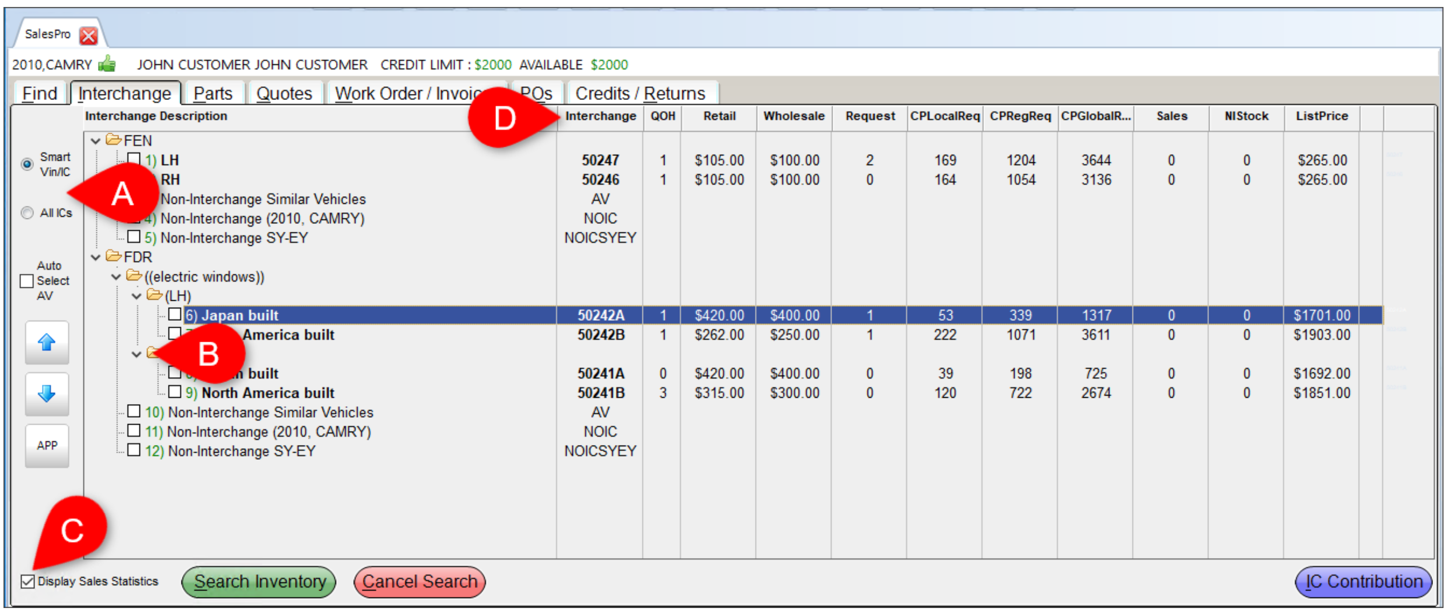
- **SmartVin/IC** displays choices narrowed by SmartVin and Smart Interchange*.
- **All Ics** displays all interchange choices for this year/make/model.

B. Using the arrowheads (˅) 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 Car-Part.com Demand Data subscribers. Contact your sales rep to learn more.

D. Resizing the columns with your mouse. The right-most column is the available **ListPrice**. Resize your columns to ensure you are seeing all of the information.



*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** or Checkmate Classic: **S3** or Checkmate Junior: contact support).

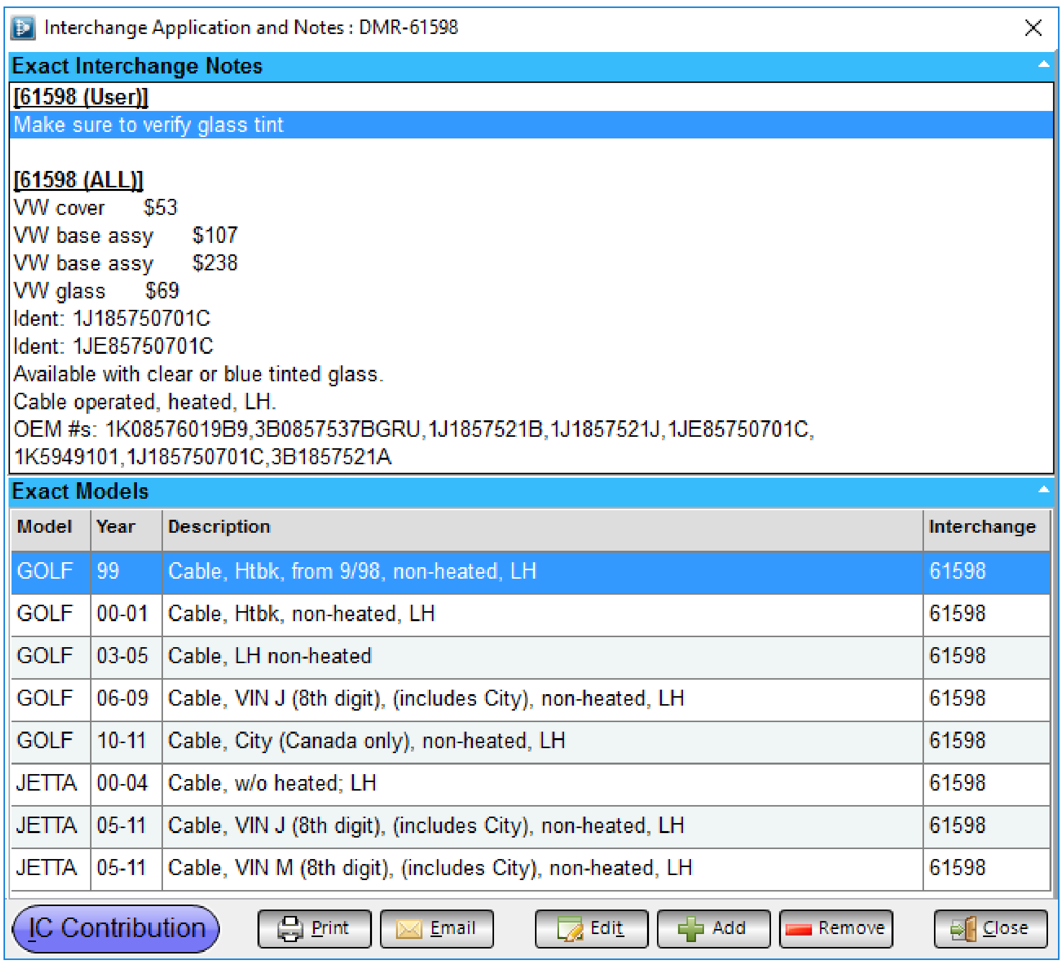
Interchange Application and Notes

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**.



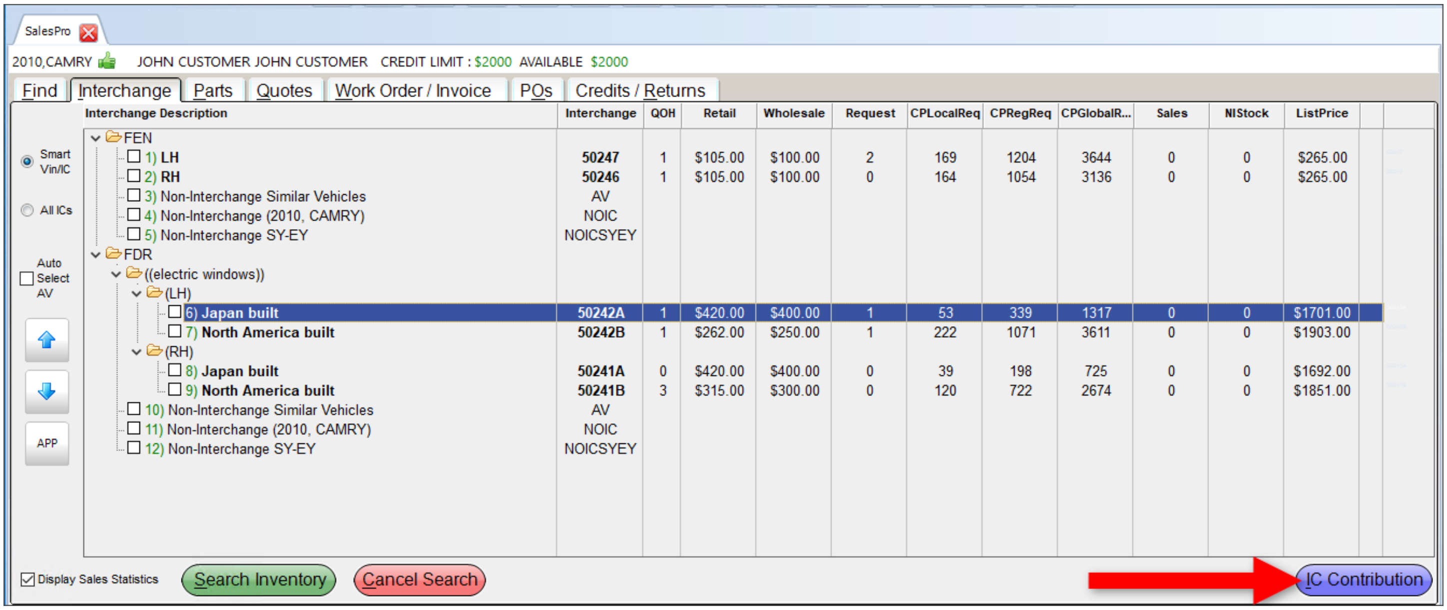
⚠ **Note:** You can only edit or remove notes that have been entered by Checkmate users; you cannot modify Car-Part Interchange notes.

Interchange Contribution

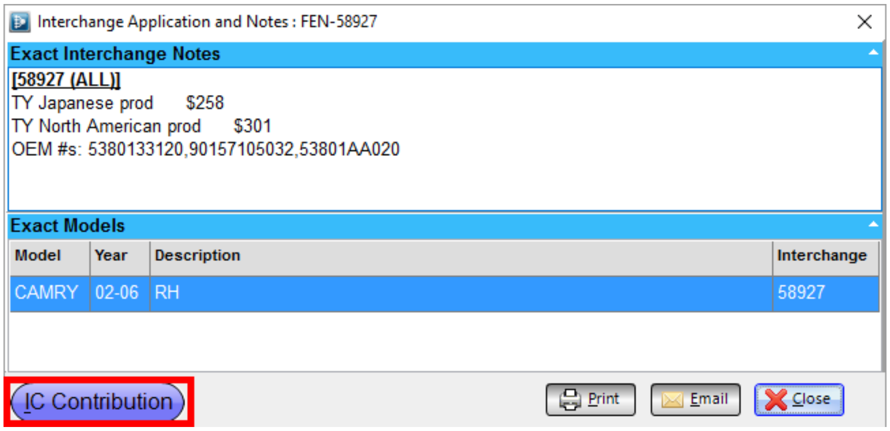
Sales Pro gives you the ability to submit interchange contributions to Car-Part.com's Interchange Development team. Use this feature when you want to submit information that could be useful to other recyclers, or to alert us if you find discrepancies in the interchange. The contributions you submit are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

To submit an interchange contribution, follow these steps:

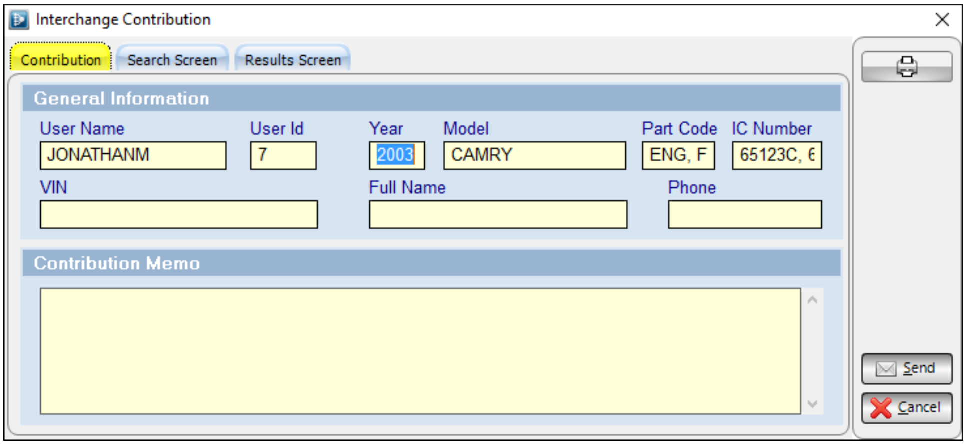
1. Click to highlight a part on the **Interchange** tab and then click the **IC Contribution** button.



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



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



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.

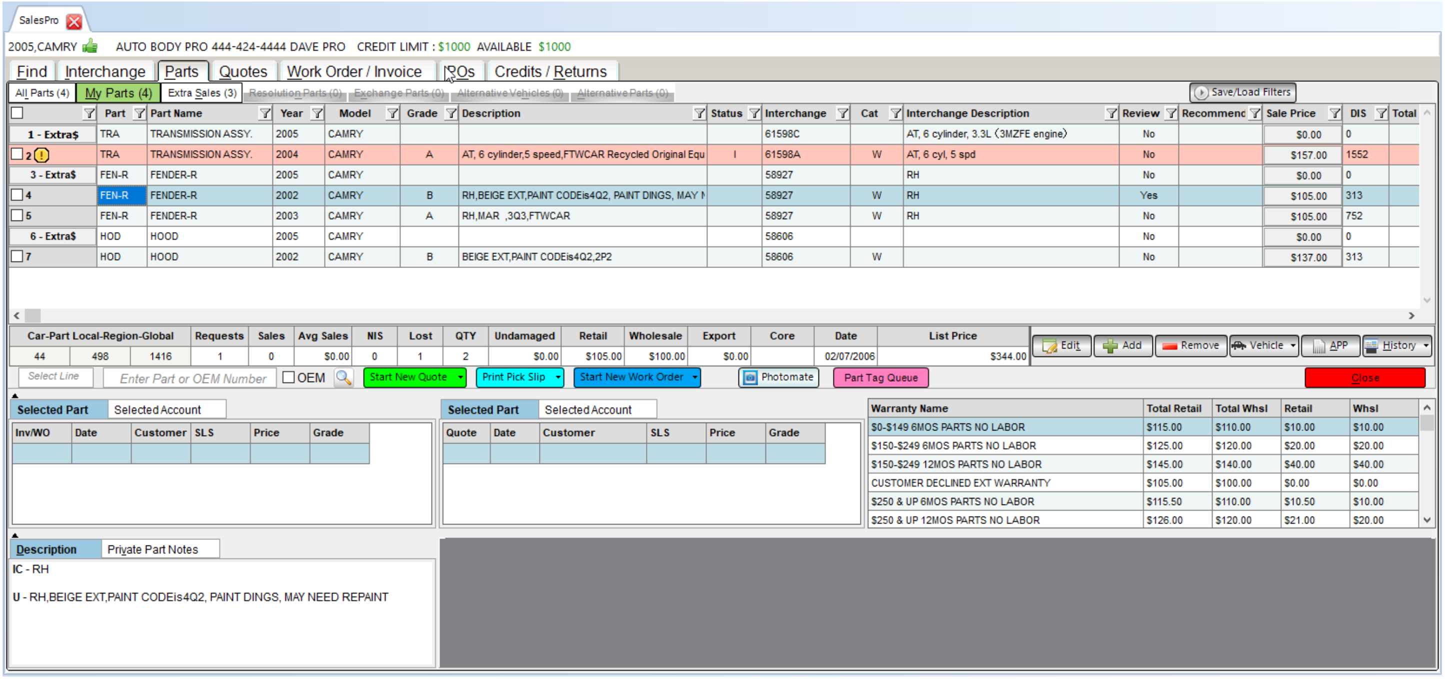
3. Click **Send**. If you use a default email client, your email client will open a new email with all of the interchange contribution information included. The information you entered is added to the body of the email, and the screenshots Sales Pro captured are sent as an email attachment. It will be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



Customize Display

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

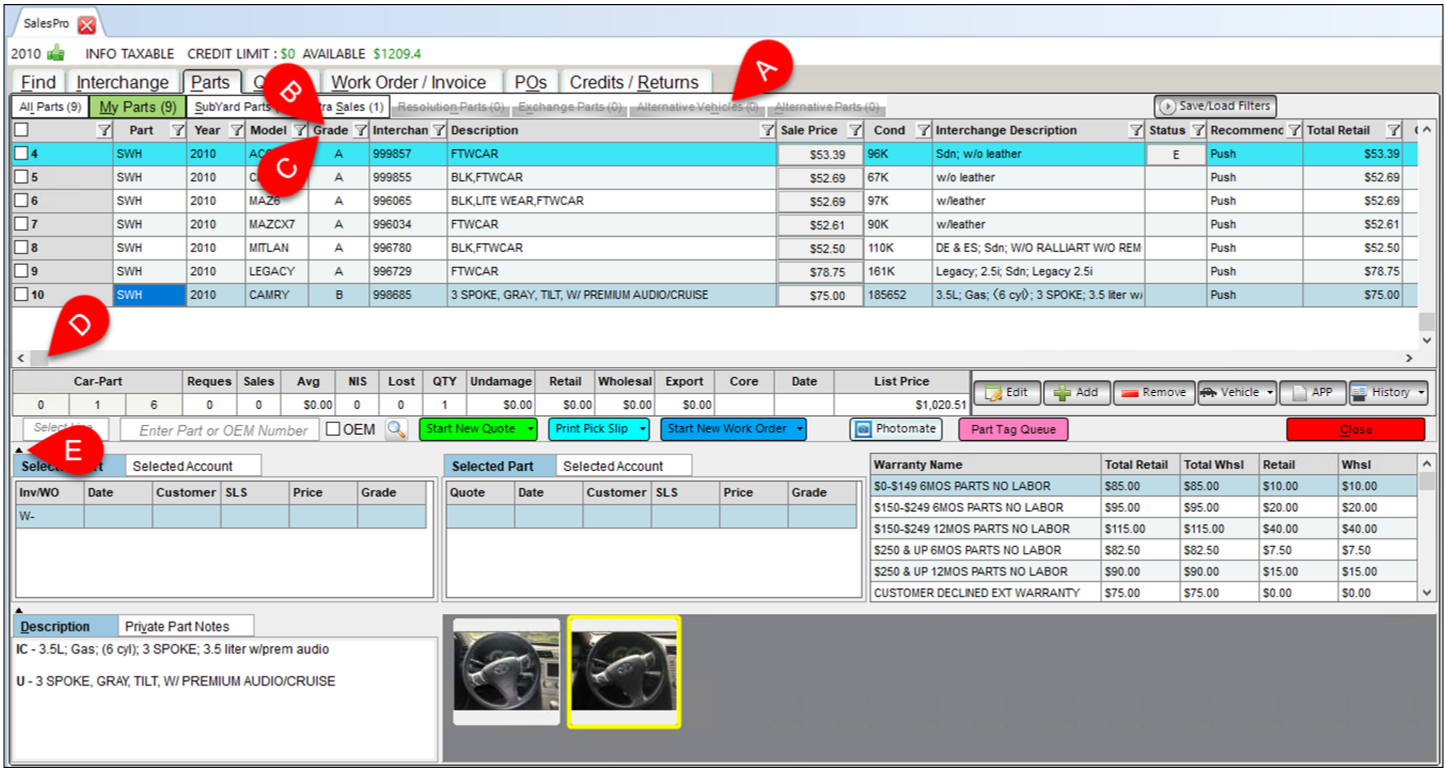
A. Clicking the type of parts you want to see (Resolution Parts, Exchange Parts, Alternative Vehicles, etc.) (see the **View Part Information** section of this document for more information)

B. Clicking a column title to sort by that column, resizing columns with your mouse, or clicking and dragging column headers to rearrange columns

C. Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).

D. 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)

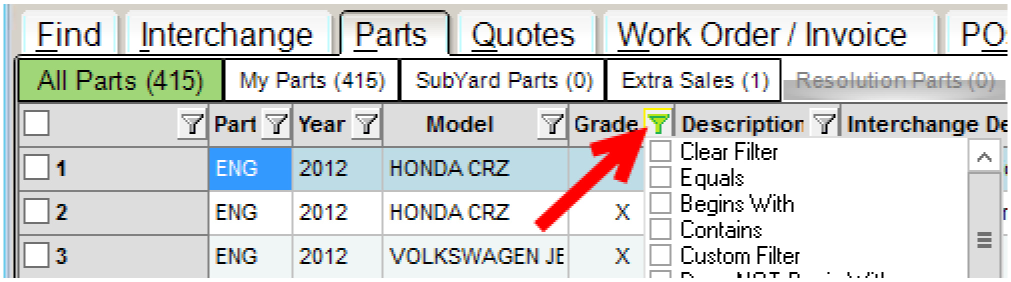
E. Clicking the arrow buttons to expand or collapse the bottom two sections of information



Filter Search Results

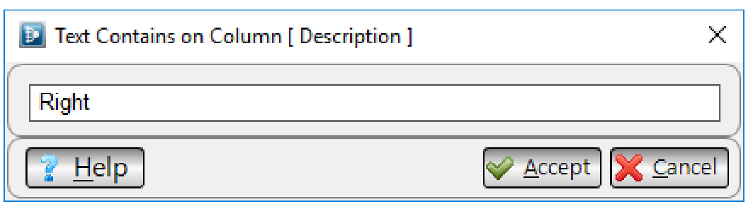
Filters allow you to view only certain parts in this list (e.g., you may filter by the **Grade** column to only see parts of a certain grade).

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.

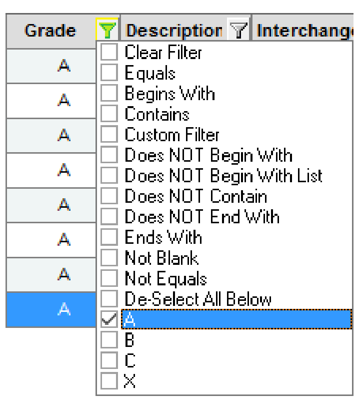


Here's how it works

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."



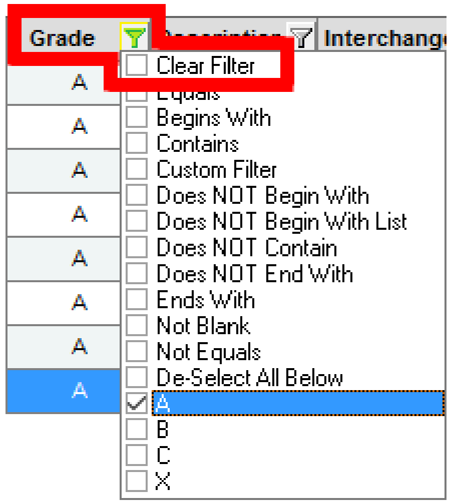
   - Exact filters. The filter menu may display options that allow you to select exact information to filter by.
     - For example, in the **Grade** column, you can simply click the **A** filter to filter your results to *only* show parts with a grade of A.



   - 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**.



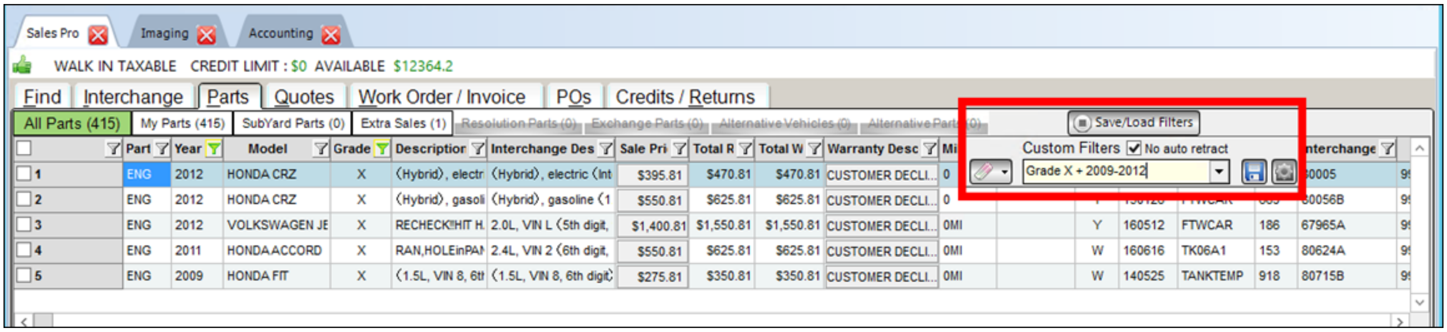
⚠ **Note**: Multiple filters can be applied simultaneously (for example, you could now add a filter in the **Year** column to only show parts with a grade of X *and* a year of 2009-2012).

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 Checkmate Inventory Pro.

Using Saved Custom Filter Settings

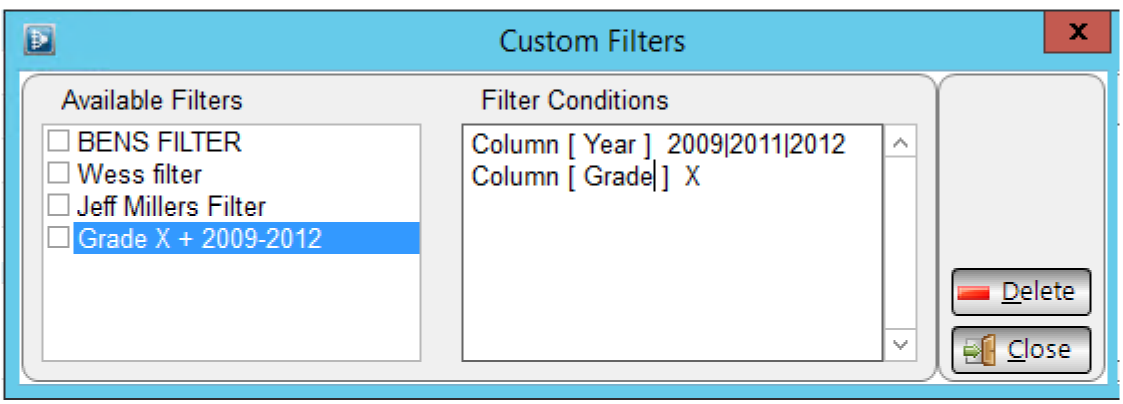
Once a custom filter has been saved, you can use it on any search results. To use a saved custom filter, follow these steps:

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:

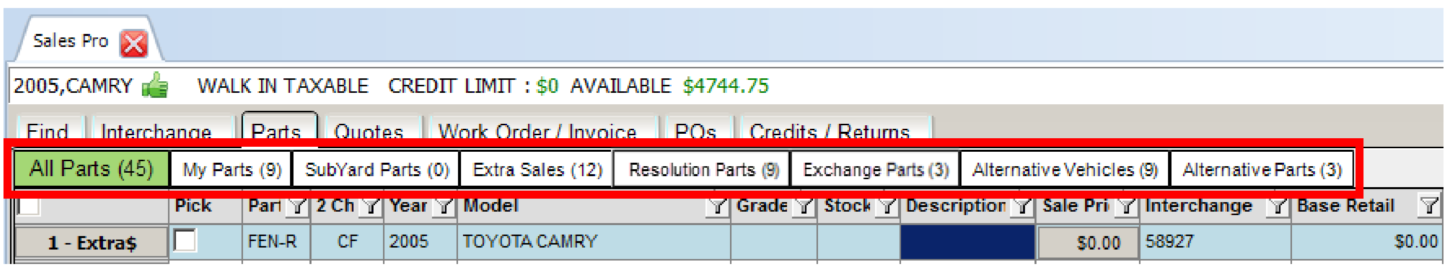
1. Perform a search.
2. Click the **Save/Load Filters** button.
3. Click the gear icon to access the Custom Filters settings.
4. A window opens listing each available custom filter. Click on a filter name to select it. When a filter name is selected, the **Filter Conditions** column lists the details 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.



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 Car-Part.com Demand Data 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 (Car-Part.com Demand Data 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**

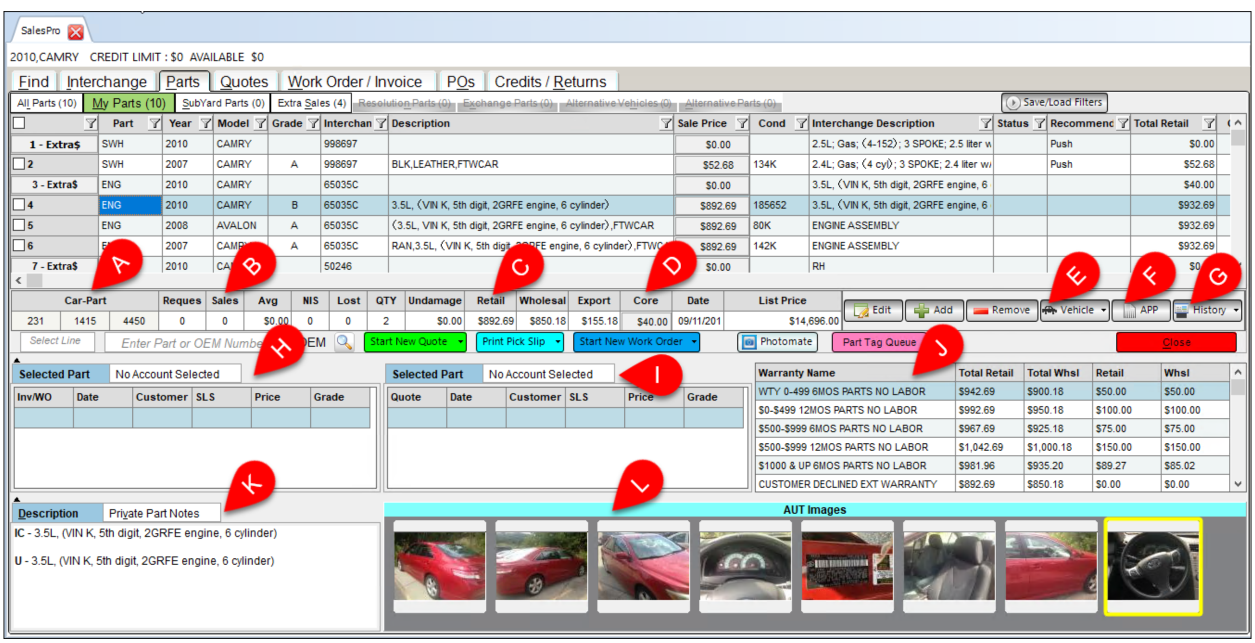
I. Quotes for the **Selected Part** and quotes for the **Selected Account**

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

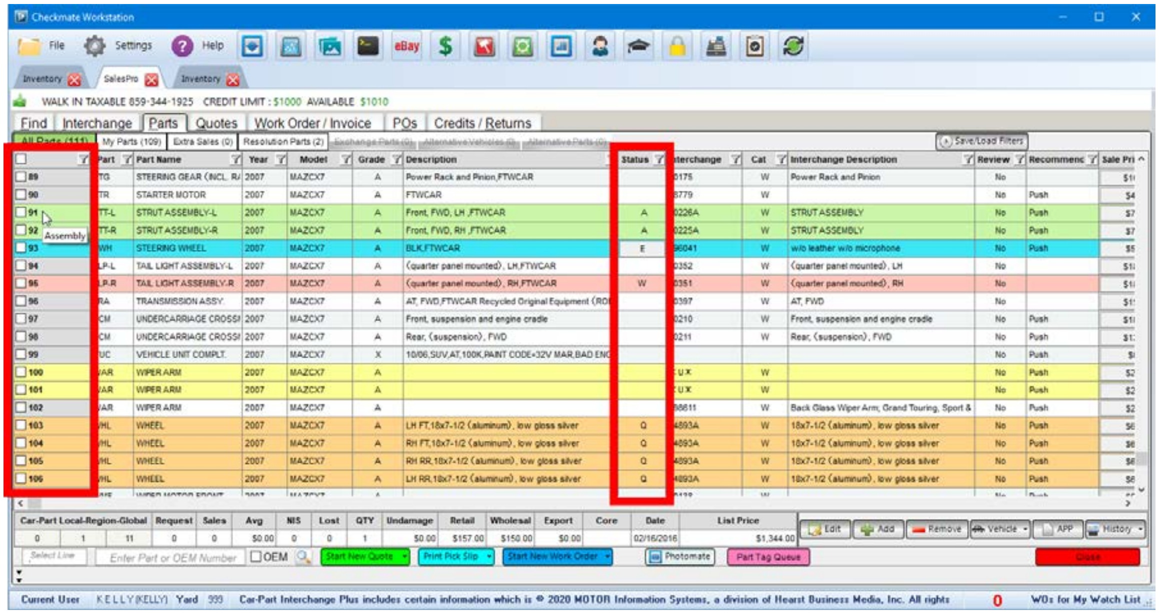
L. Images associated with this part and vehicle (more information in the **Image Viewer** section of this guide, below)



Part Colors

In search results on the **Parts** tab, how a part displays gives you information about the part:

- If a part **Description** is red, this means the part's grade is determined by a keyword in the **Description**.
- Certain types of parts are colored on the entire part line. You can quickly see the reason a part is colored by hovering your mouse pointer over the checkbox column, or by looking at the **Status** column.



The following table gives the meaning of the colors.

Color	Meaning		Priority
	W	Work Order	High
	I	Invoice	
	S	Sold	
	D	Deleted	
	C	Committed on eBay	
	H	Hold	
	Q	Quote	
		Resolutions	
		Non-exact Interchange	
	E	Listed on eBay	
	X	eBay listing expired or canceled on eBay	
	A	Assembly/component (inventoried in Partmate)	Low

Red part **Description**: Power, non-heated, RH,NICK	The part grade is determined by a keyword in the part **Description**.

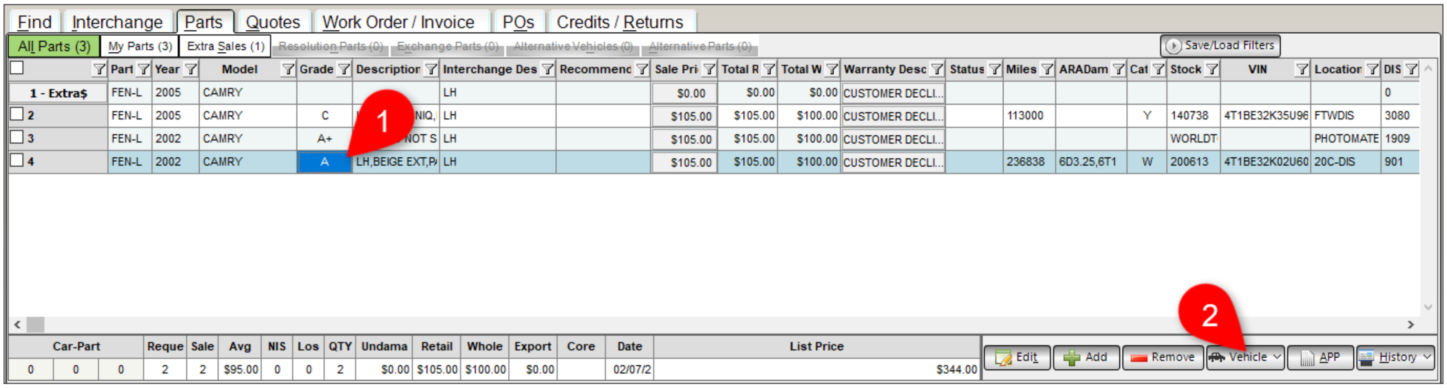
If a part has more than one status, the color for the highest priority status displays. In this table, colors are listed in order of priority, highest priority at the top.

For example: a part with a status of **WQ** would display in red because a part on a work order is a higher priority than a part on a quote.

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:

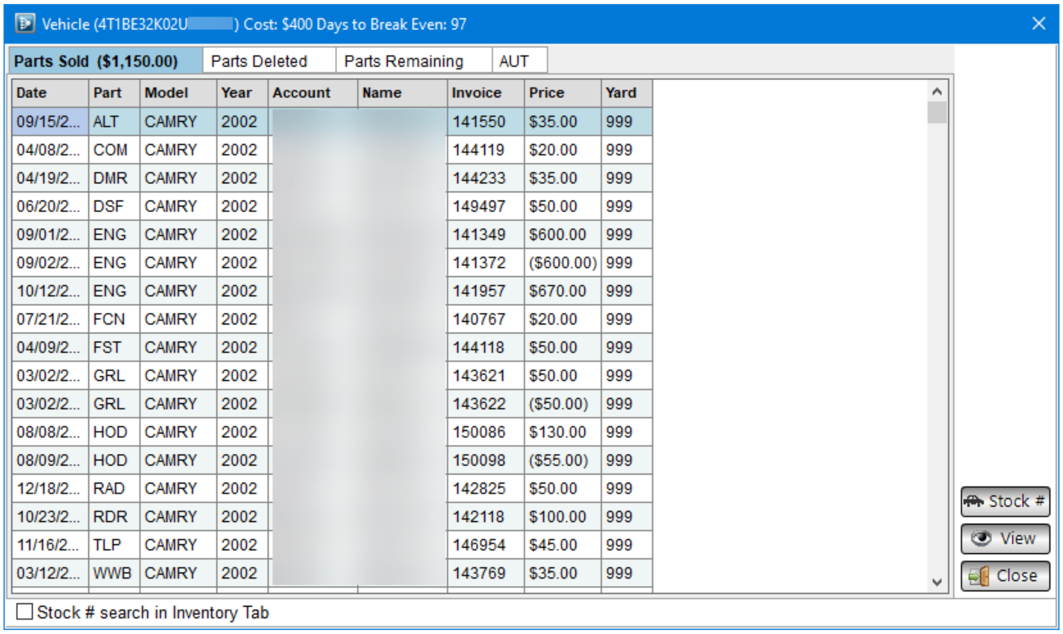
1. Click to highlight a part.
2. Click the **Vehicle** button.



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

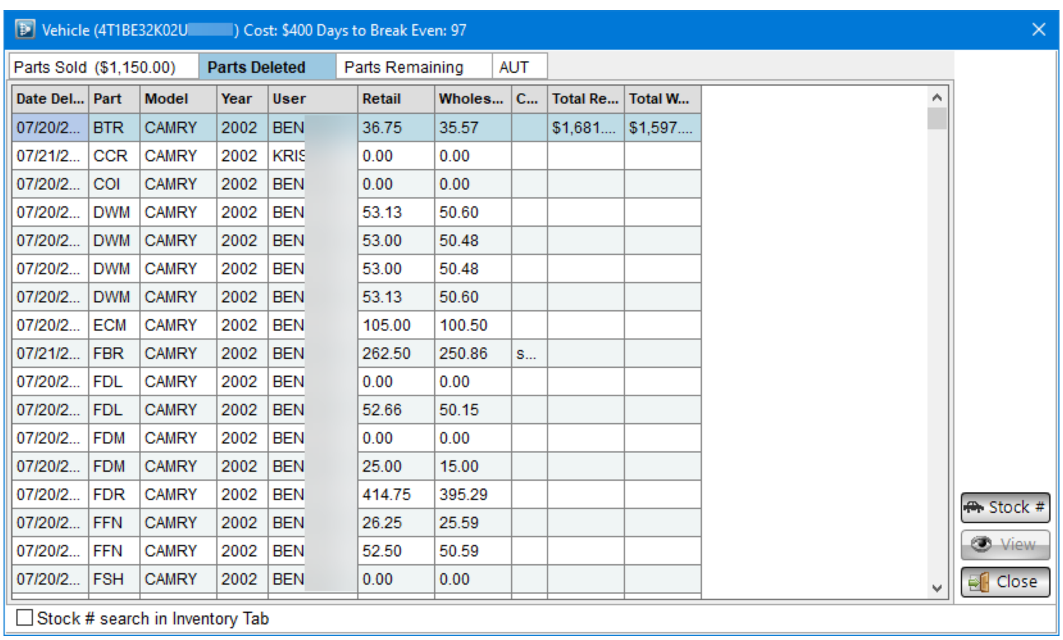
The **Parts Sold** tab lists parts from this vehicle that were sold. From this tab, you can highlight a part, and then click the **View** button to open the invoice for the selected part.



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

Parts Deleted

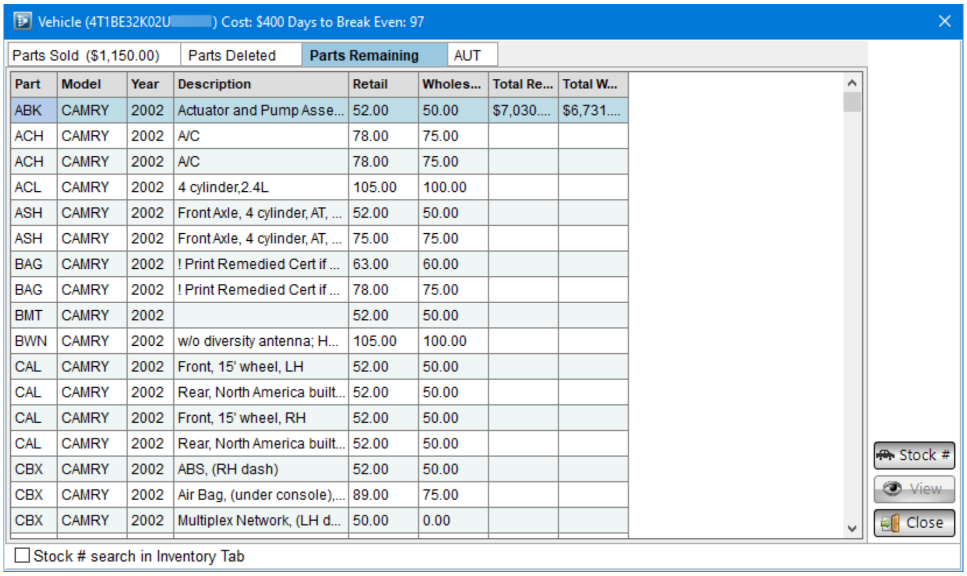
The **Parts Deleted** tab lists the parts from this vehicle that have been deleted from your inventory.



Parts Remaining

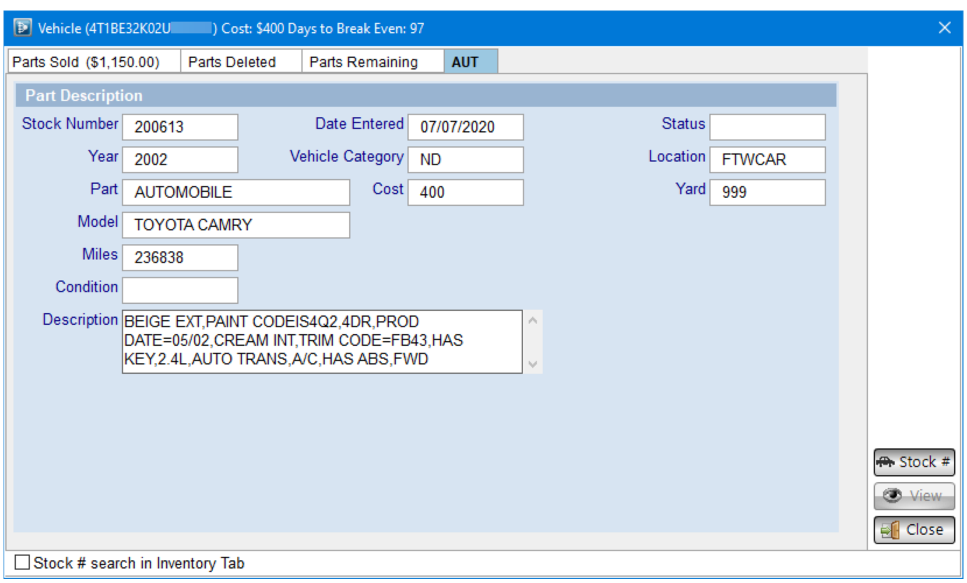
The **Parts Remaining** tab lists the parts from this vehicle that are available for sale. To see all available parts for this stock number, click the **Stock #** button:

- If the **Stock # search in Inventory Tab** box is checked, an Inventory Pro tab will open with all available parts from this stock number listed.
- If the **Stock # search in Inventory tab** is unchecked, this adds all of these parts to the search results on the **Parts** tab in Sales Pro. ⓘ **Warning:** This completely replaces any parts that were previously listed in the results. Any parts you had selected before pressing this button will *not* be selected after you press this button.



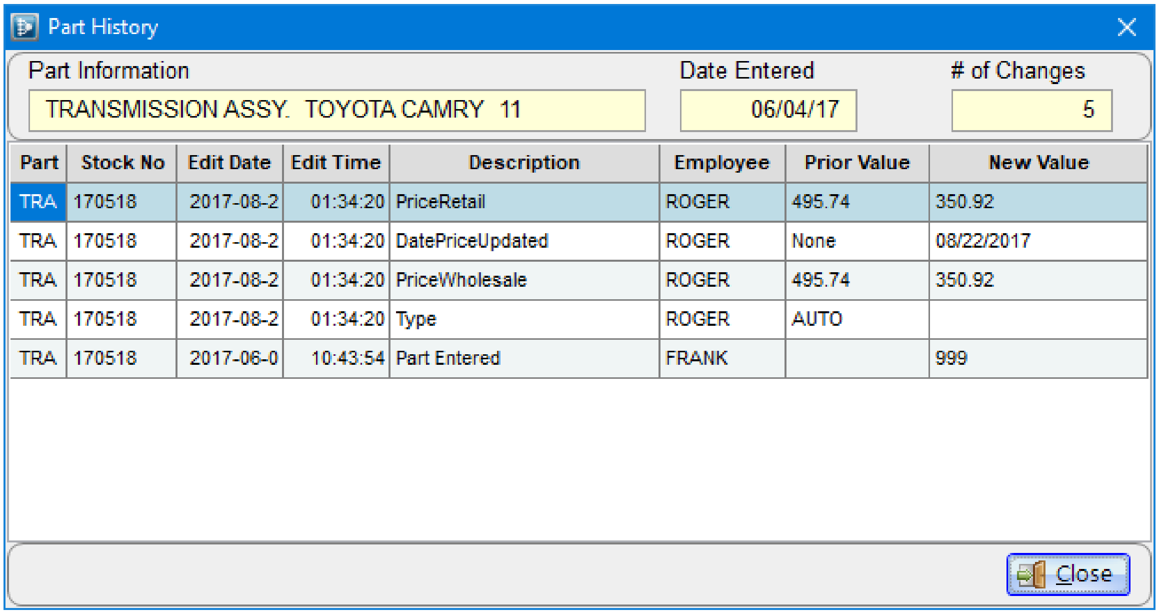
AUT

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.



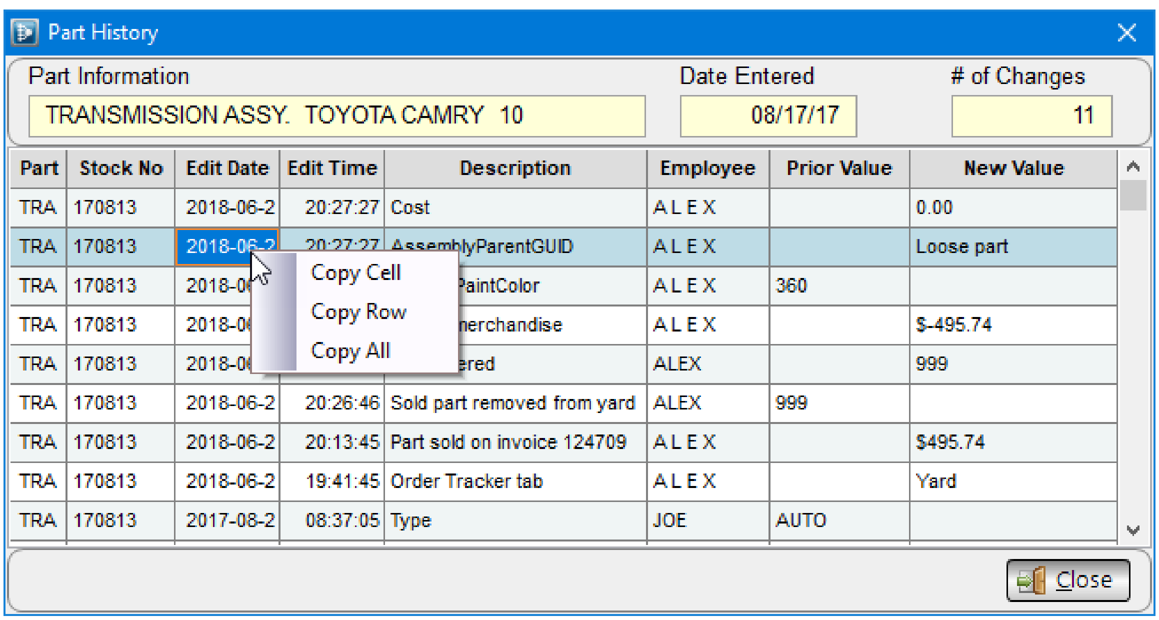
Part History

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.



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.



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***.

Part	Stock No	Edit Date	Edit Time	Description	Employee	Prior Value	New Value
TRA	170813	6/22/2018	20:27:27	Cost	A L E X		0
TRA	170813	6/22/2018	20:27:27	AssemblyParentGUID	A L E X		Loose part
TRA	170813	6/22/2018	20:27:27	PrimaryPaintColor	A L E X	360	
TRA	170813	6/22/2018	20:26:57	Return merchandise	A L E X		($495.74)
TRA	170813	6/22/2018	20:26:46	Part Entered	ALEX		999
TRA	170813	6/22/2018	20:26:46	Sold part removed from yard	ALEX	999	
TRA	170813	6/22/2018	20:13:45	Part sold on invoice 124709	A L E X		$495.74
TRA	170813	6/22/2018	19:41:45	Order Tracker tab	A L E X		Yard
TRA	170813	8/23/2017	8:37:05	Type	JOE	AUTO	
TRA	170813	8/22/2017	15:06:31	Location	JOE	FTWCAR	TJ60D1
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.

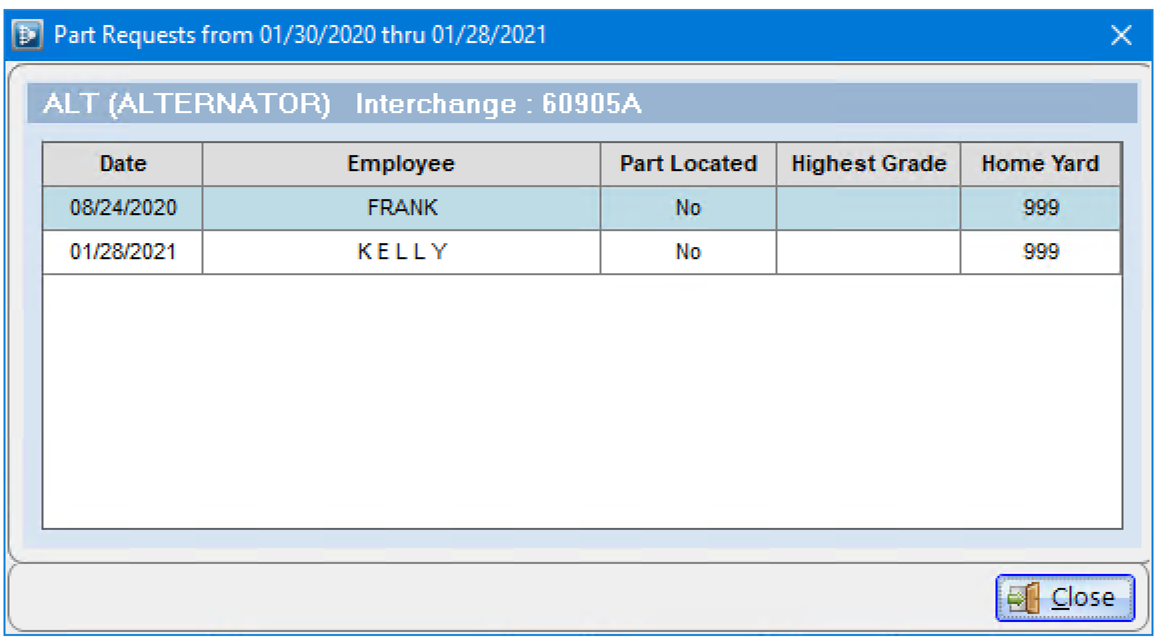
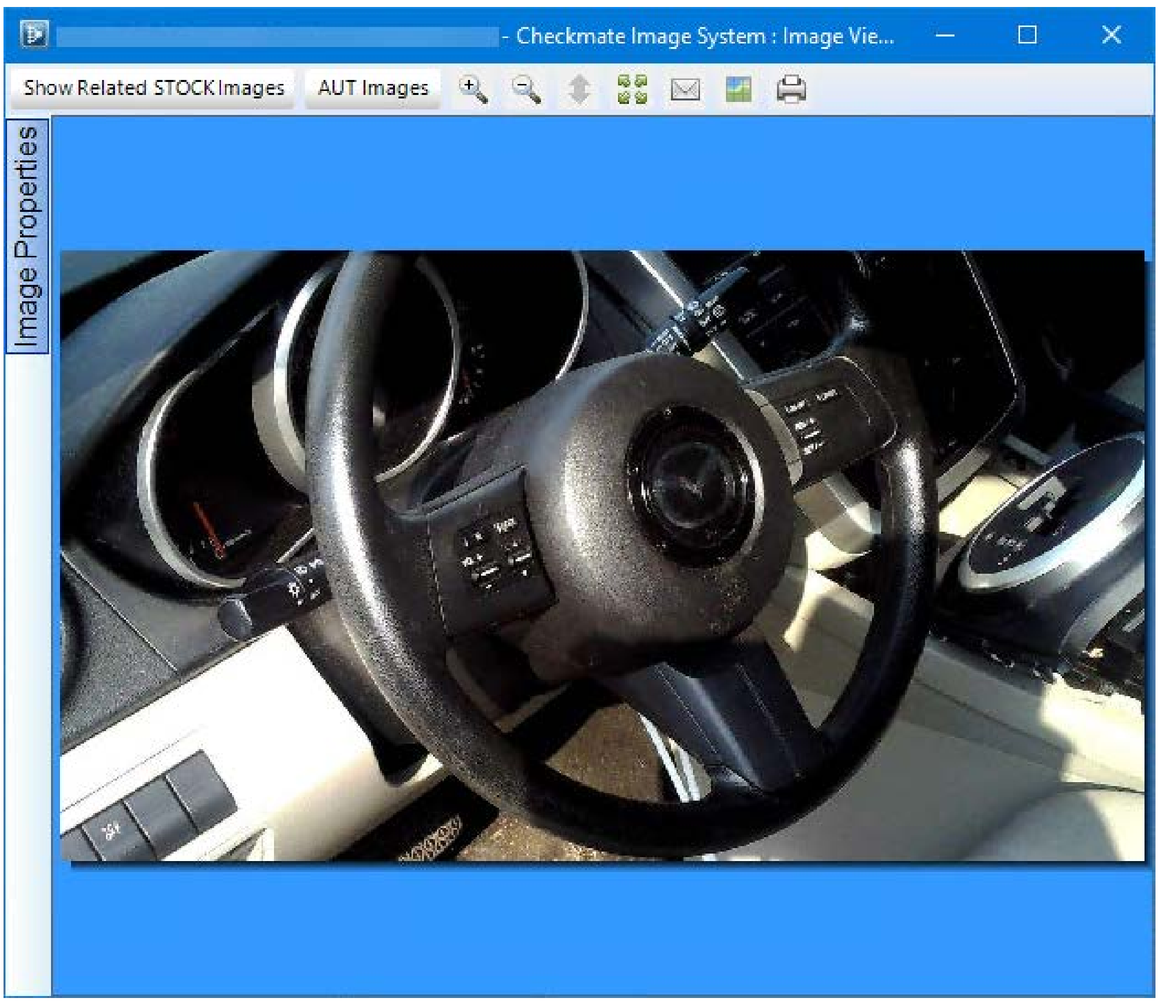


Image Viewer

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. From here you can:

- Zoom in/out, see the best fit of the image, see the actual size of the image, email the image, edit the image in the **Image Editor**[*], or print the image.
- Click the **Show Related STOCK Images** button to view all images associated with the rest of this vehicle (including images associated with the AUT record).
- Click the **AUT Images** button to view images associated with the vehicle's AUT record. (This button will not appear if there are no images saved for the AUT.)
- 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.



[*] For more information, refer to the section of this guide called: **Image Editor**.

When you are viewing the related stock images, if the original item is listed on eBay, you can click the **Show eBay Listing** button to view the eBay listing.

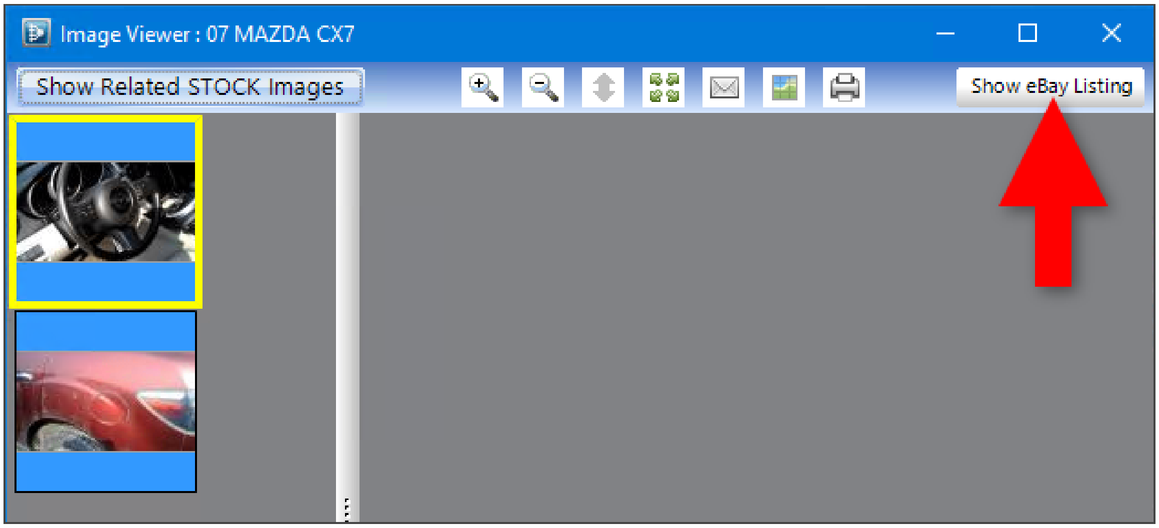
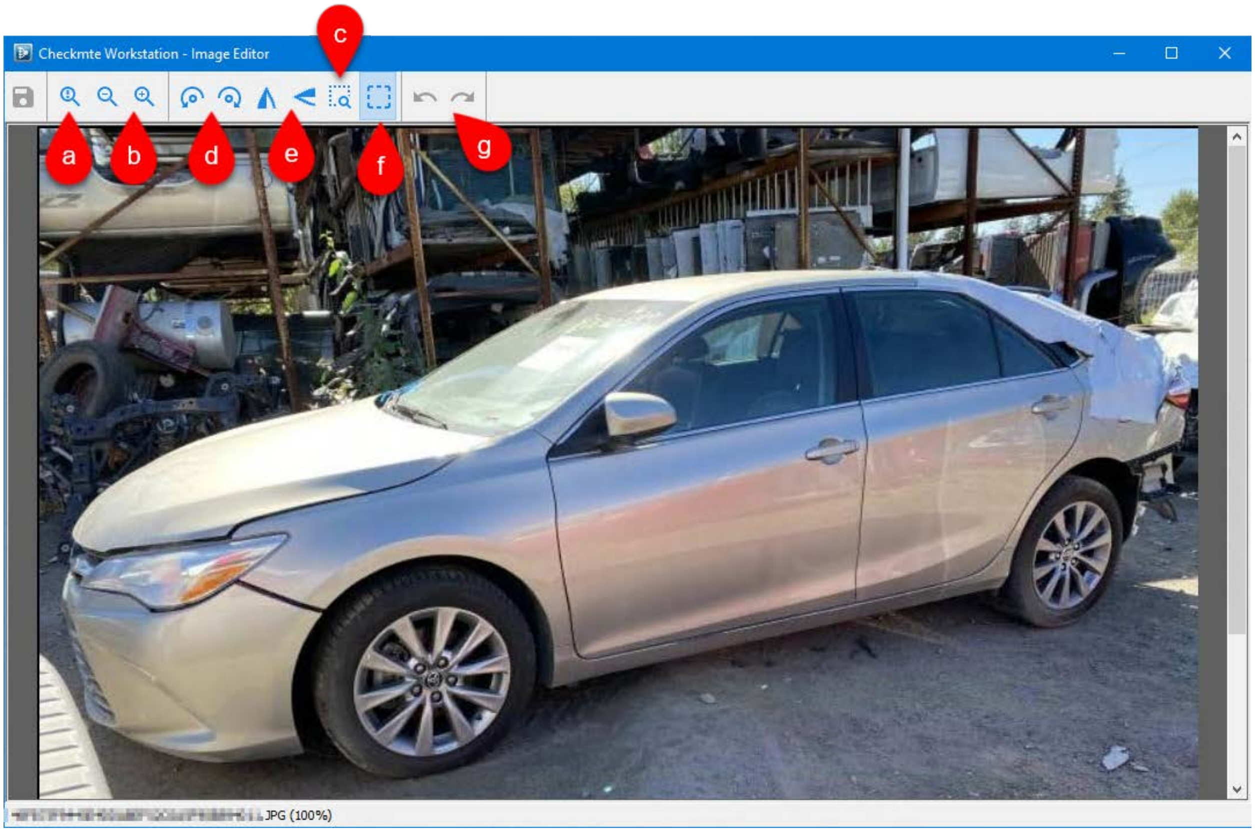


Image Editor

The **Image Editor** window lets you crop, rotate, or flip images directly in Checkmate. You can access this feature from the **Image Viewer** window.

To use this feature:

1. When you're viewing an image on the **Image Viewer** window, click the edit image button. 
2. Use the buttons at the top of **Image Editor** to change your view or edit the image.

   The following buttons change your zoom in **Image Editor** (using these buttons changes your view of the image within this window; they do not alter the image):

   a. Toggle between fitted to screen and max size

   b. Zoom out/Zoom in

   c. Zoom in on a selected area

   The following buttons alter the image:

   d. Rotate counter-clockwise/Rotate clockwise

   e. Flip horizontally/Flip vertically

   f. Crop (Use your cursor to select the area you wish to keep. Then right-click, and select **Crop**)

   g. Undo last edit/Redo last edit
3. Click the save button when you are finished editing.

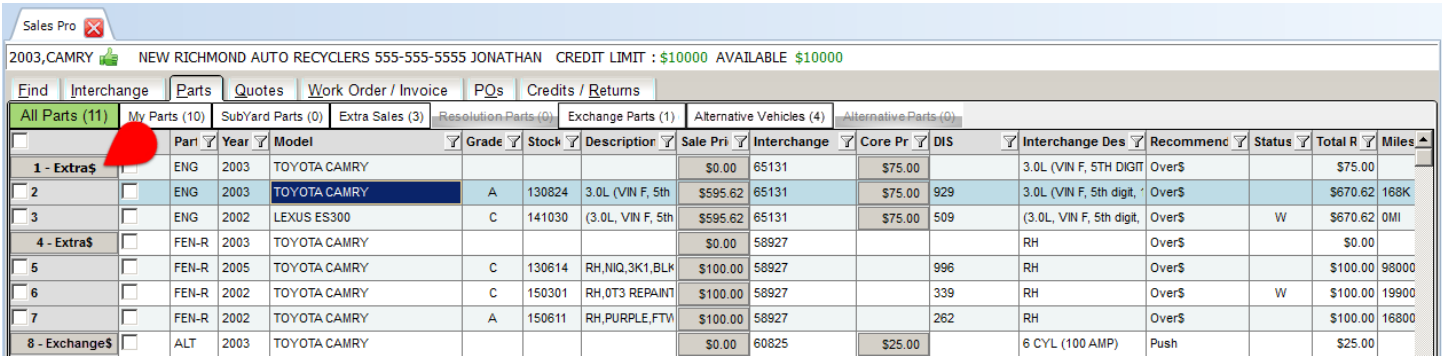
Part Sale Actions

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

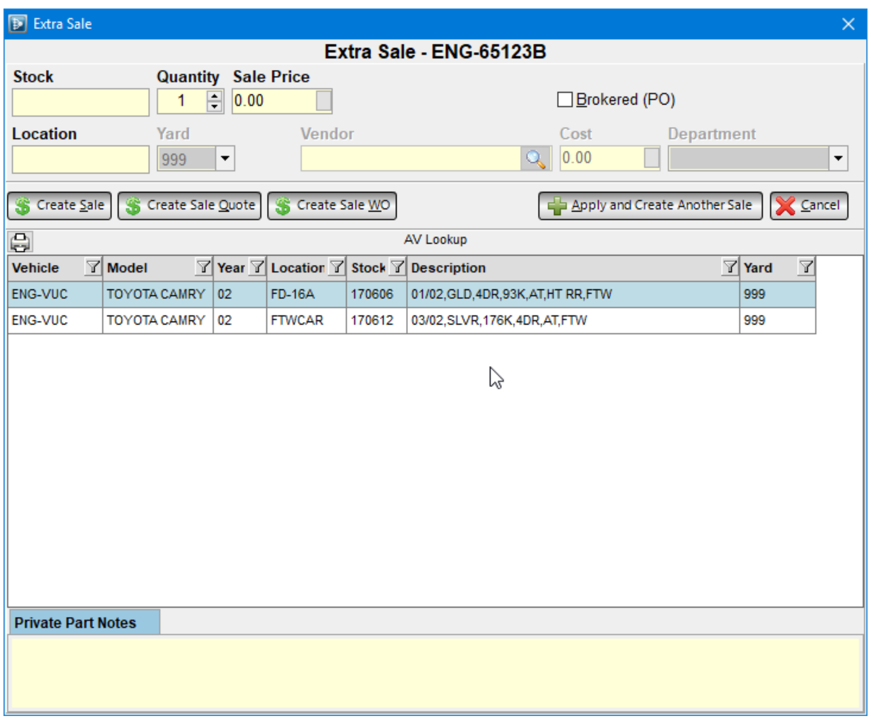
Extra Sale

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.



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.
     - o 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.



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:**

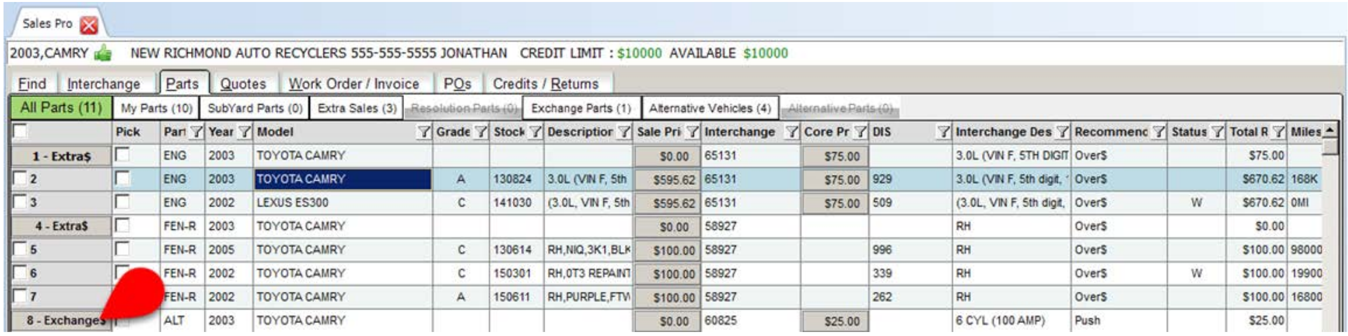
- When a work order is created for a brokered Extra Sale part, a purchase order is created automatically. See the **Create Purchase Orders (POs Tab)** section of this guide for more information about purchase orders.
- Once you create a work order for Extra Sale parts, Sales Pro will generate an inventory 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** or Checkmate Classic: **S3,4** or Checkmate Junior: contact support).

Exchange Sale

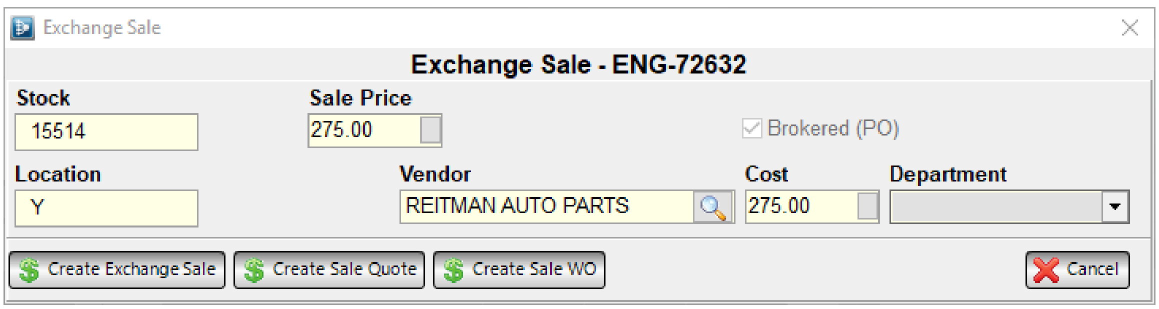
Car-Part Exchange provides you with immediate access to the inventories of the yards you frequently do business with. By mutual agreement, these selected yards become your Exchange Partners in Checkmate. Exchange Sales in Sales Pro are for parts that you are selling through your Car-Part Exchange partners.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

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



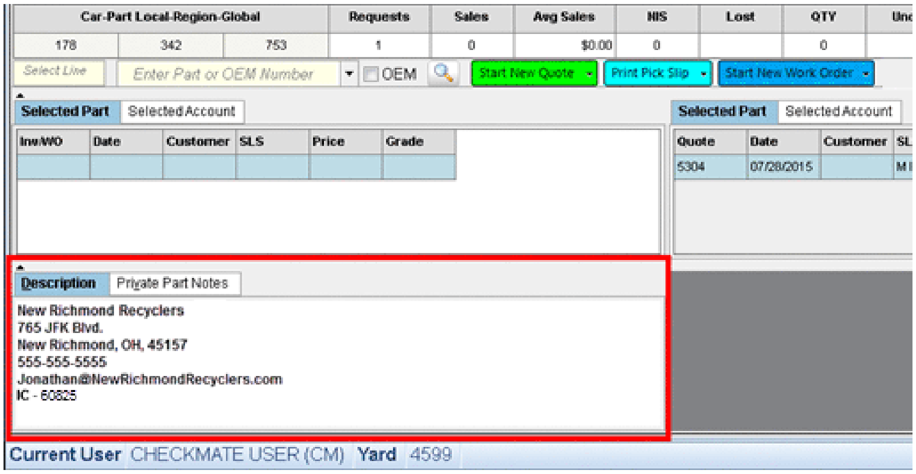
2. The **Exchange Sale** window opens. The **Stock** number, **Sale Price**, **Location**, and **Cost** are filled in automatically.

⚠ **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.



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

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.)



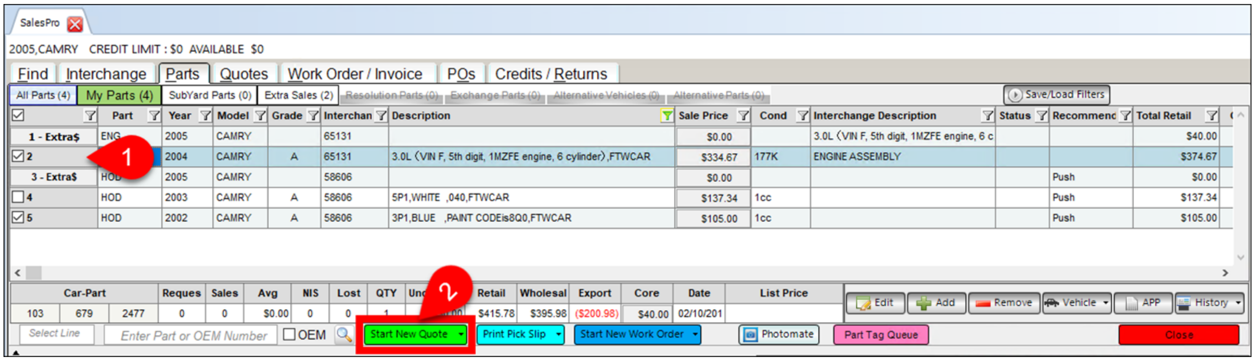
4. Review or edit the **Sale Price** and **Cost**. Edit the **Sale Price** to include any markup you wish to apply to the sale. Click the blank box if you would like to use a calculator.
5. Select a **Department** (if applicable).
6. Create the Exchange Sale by clicking one of the following:
   - **Create 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.



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

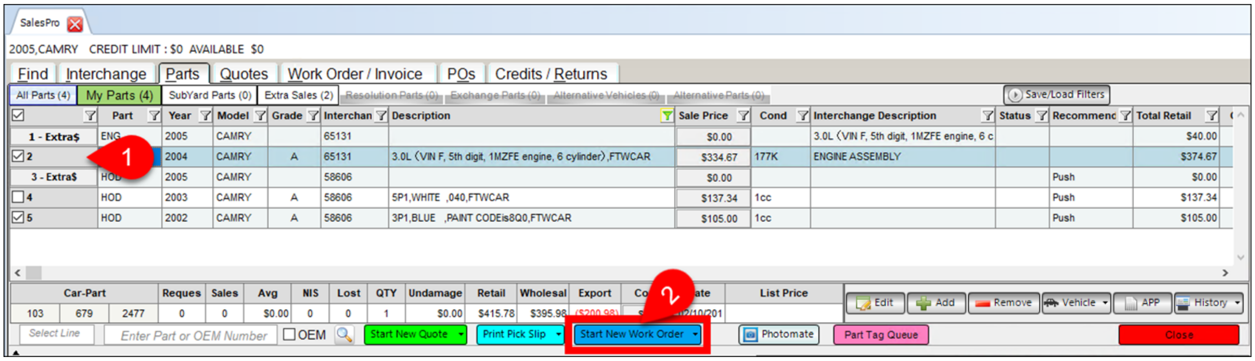
3. The **Quotes** tab opens. For more information about this tab, see the **Quote Parts (Quotes Tab)** section of this guide.

* 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** or Checkmate Classic: **S3,15** or Checkmate Junior: contact support).

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.



> ⚠ **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.

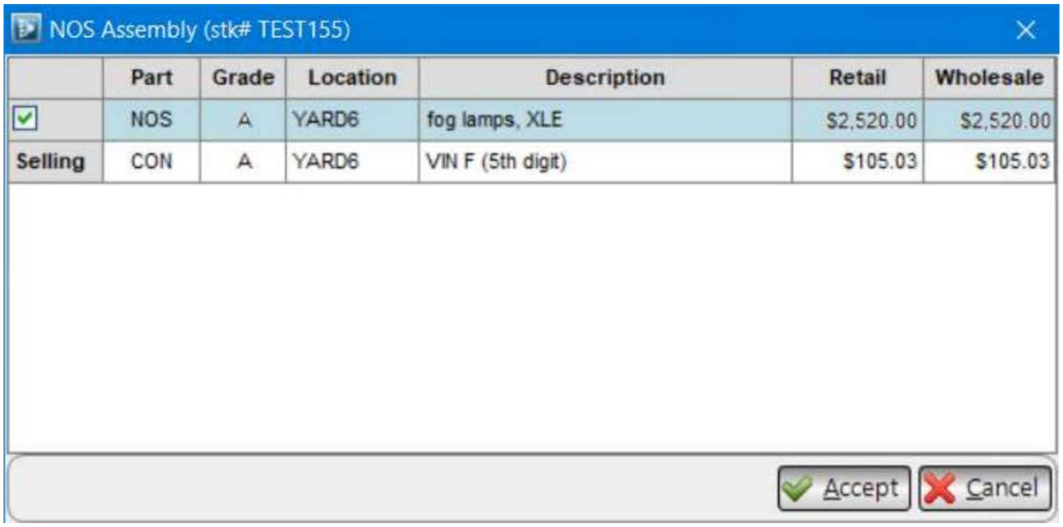
Adding Assemblies to Work Orders

If you select an assembly part (part that was inventoried as part of an assembly/has a status of **A**) and attempt to start a new work order, Sales Pro gives you the option to select which parts from the assembly you wish to include in the sale, and/or mark the main assembly part as an incomplete assembly. Here's how it works:

1. In Checkmate Sales Pro, add an assembly part to a work order.
2. A window opens for you to select which assembly parts you want to include in the sale (all parts are checked by default). The word **Selling** displays in the left column for the part you originally selected to add to the work order.
   - Leave the checkbox(es) checked to add the part(s) to the work order, or,
   - Uncheck the checkbox(es) to *not* add the part(s) to the work order.

[*] 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** or Checkmate Classic: **S3,15** or Checkmate Junior: contact support).

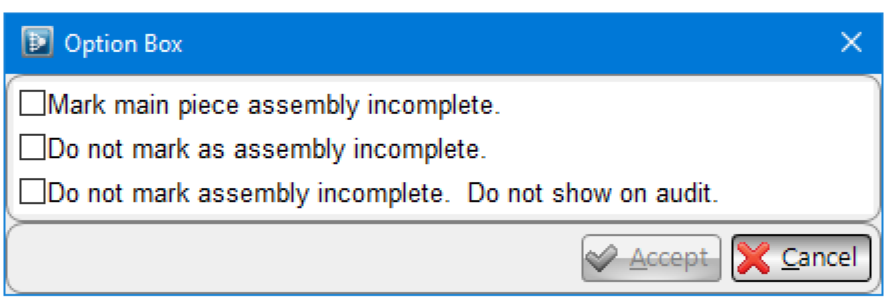
In this example, the CON is being added to the work order, and Checkmate is giving you the option to add the entire NOS instead.



3. Click **Accept**.
4. If you added a component part to the work order but did *not* add the main assembly part, then the **Option Box** window opens, prompting you to specify whether or not you would like the main assembly to be marked as incomplete in your inventory.

   Select one of the options:

   - **Mark main piece assembly incomplete** – Mark the main assembly as incomplete. The **Incomplete** column in Sales Pro and Inventory Pro will now display a **Y** (meaning, "Yes, this assembly is incomplete").
   - **Do not mark as assembly incomplete** – Do not mark the main assembly as incomplete. If you open the editing screen for the part in Inventory Pro, the part will continue to display as complete. (If you want to review the assembly later, you can search for it using the INCOMPLETE View in Inventory Pro. See the Inventory Pro User Guide* for more information.)
   - **Do not mark assembly incomplete. Do not show on audit** .*(not recommended)* – Do not mark the main assembly as incomplete and do not include it in the Incomplete view or Part Grade Audit.



5. Click **Accept** to continue your workflow.

* You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

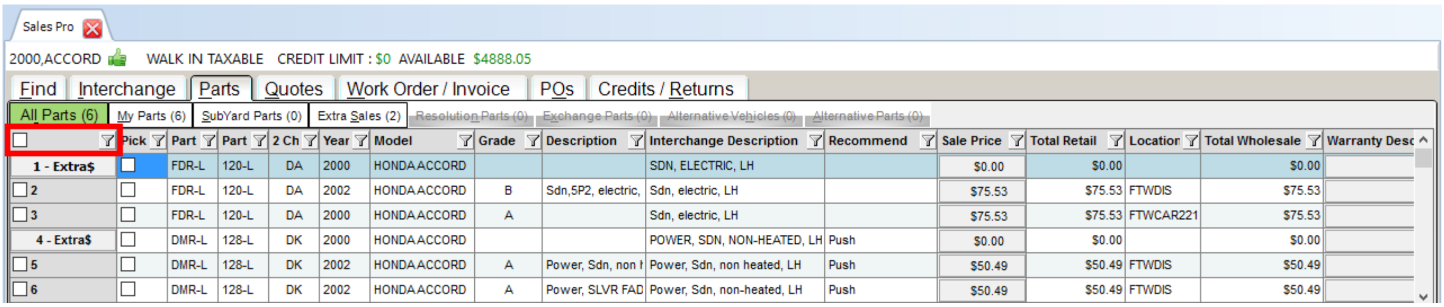
Additional Actions

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

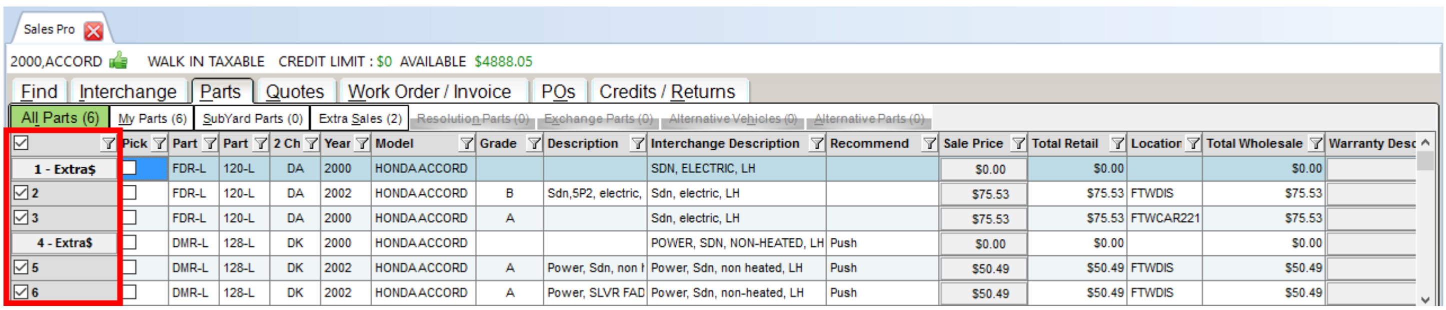
Select All Parts in Search Results

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:

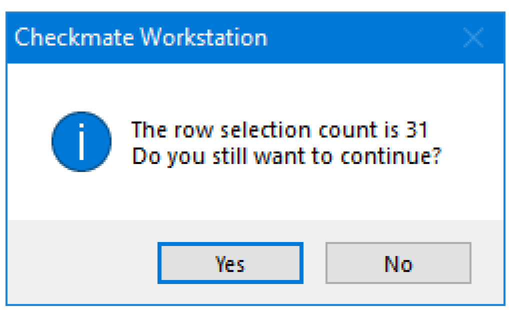
1. Check the checkbox in the top left corner of the grey, left-most column.



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



⚠ **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.

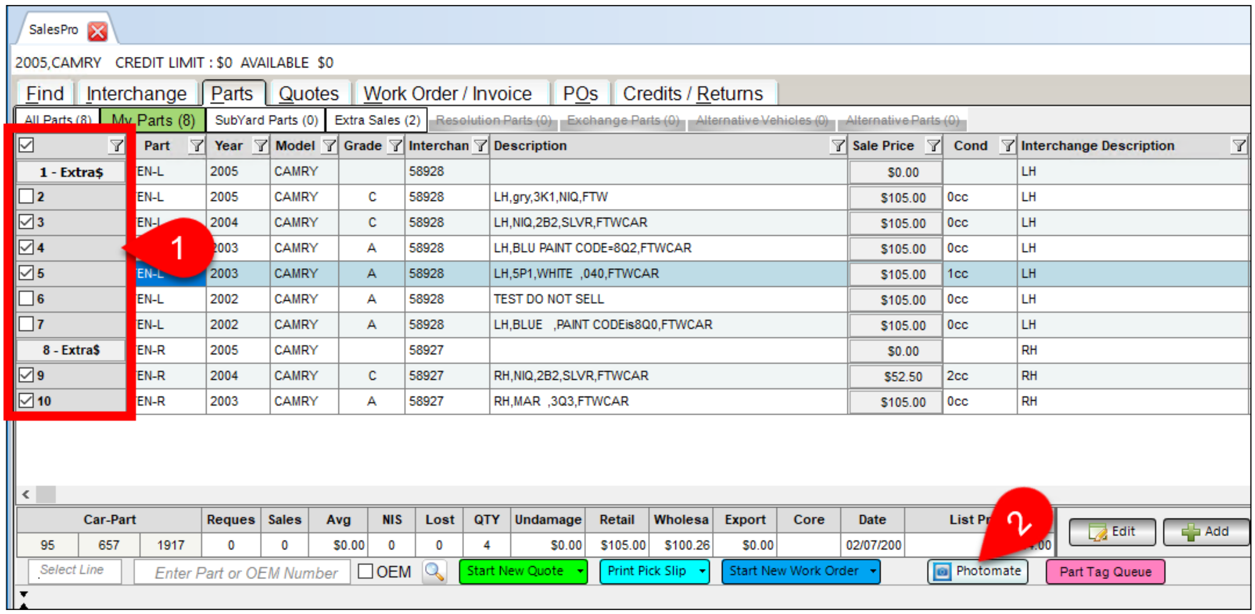


Send Parts to Photomate

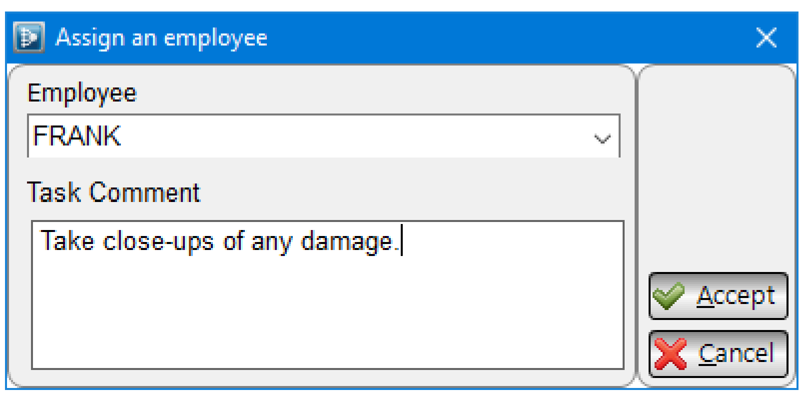
Photomate is a mobile app that helps you take your Imaging tasks out in the yard with you. Take photos with your phone or tablet, and wirelessly upload to Checkmate. (Learn more about Photomate at http://products.car-part.com/photomate)

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.



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.

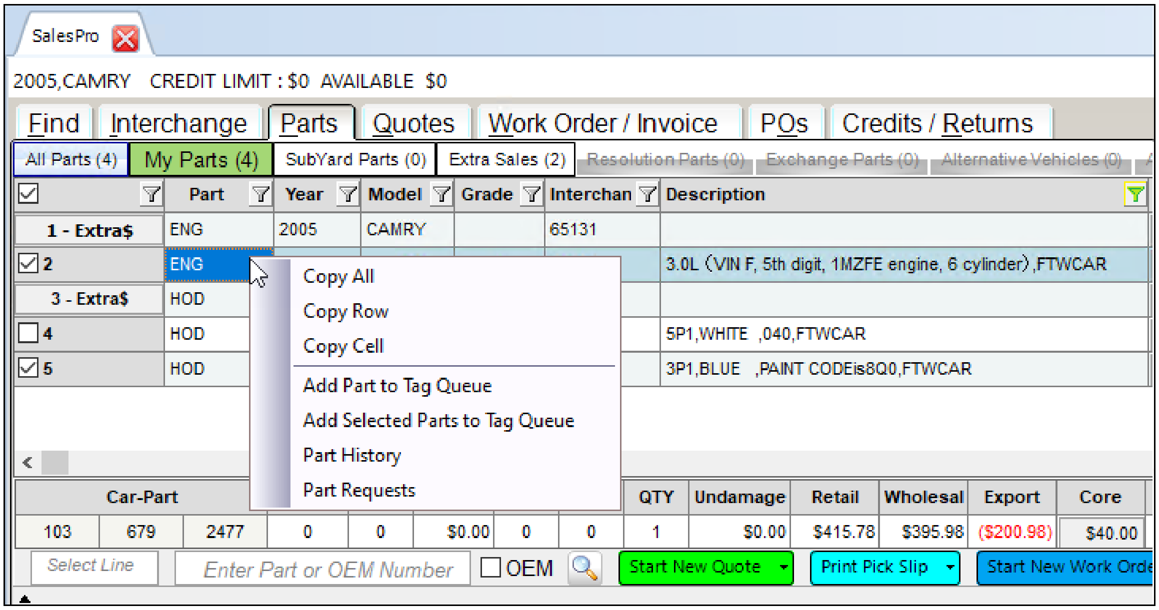


4. Click **Accept**. The part(s) you select will be sent to the Photomate application. For more information about using Photomate, see the Photomate User Guide.*

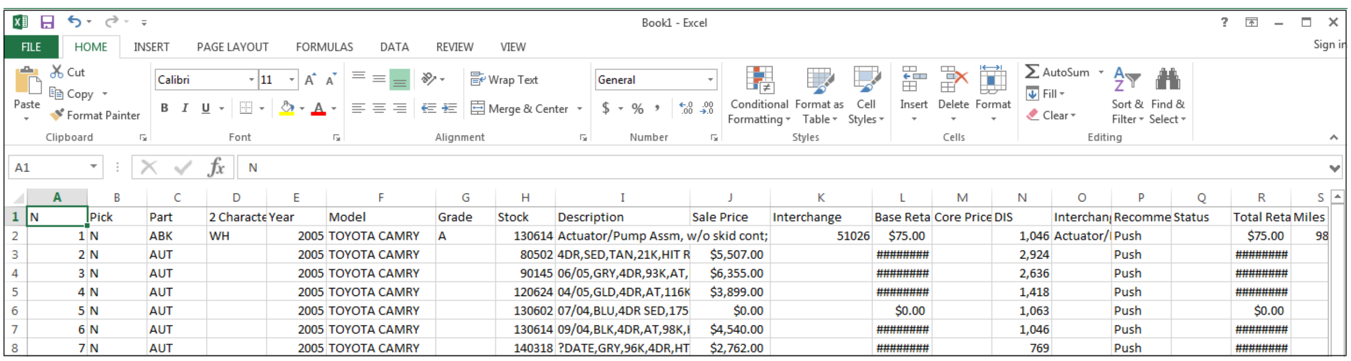
* You can find this guide and other Photomate Training materials at http://products.car-part.com/photomate/training.html

Copy Information

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

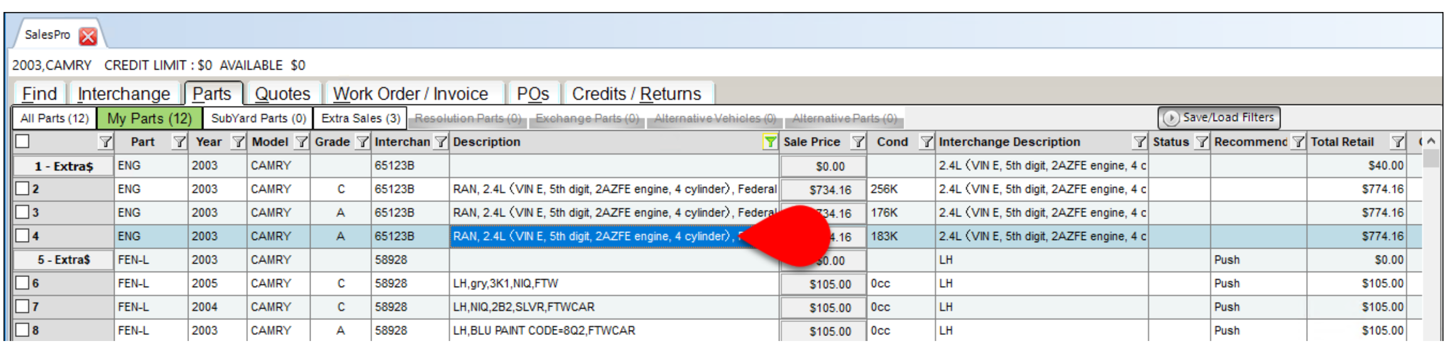


Select the appropriate option from the menu that appears, and then you can paste this information into a text editor or spreadsheet program (e.g., Microsoft Excel).



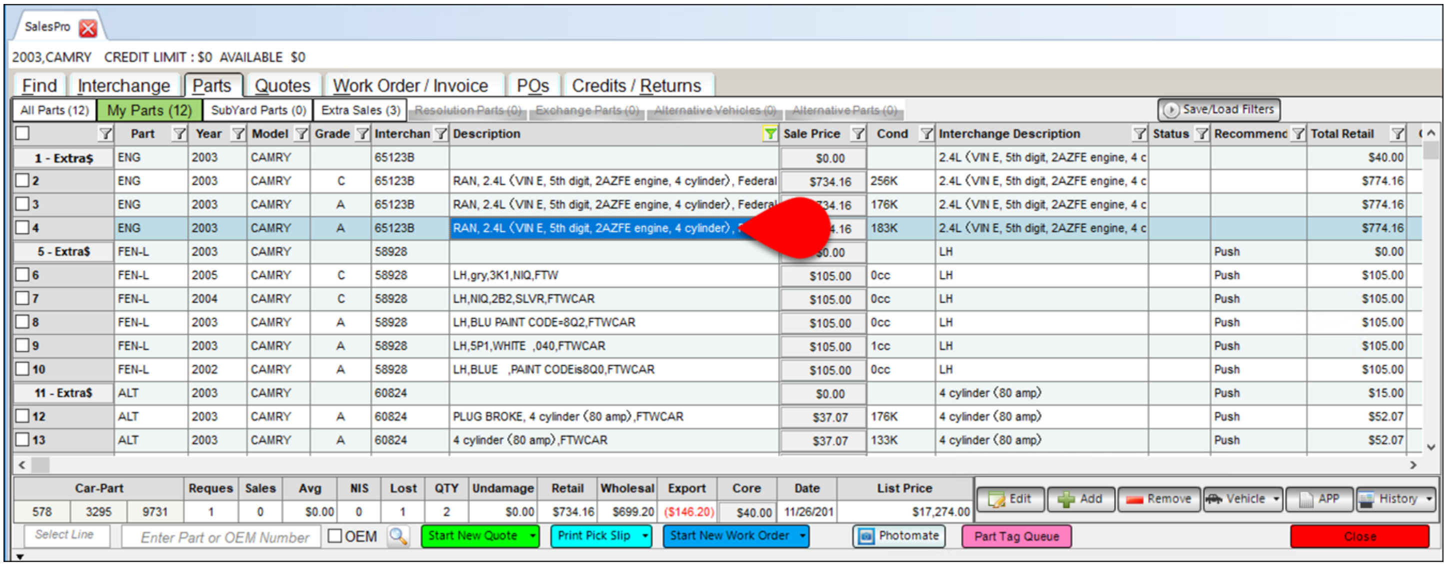
Trading Partners Search

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



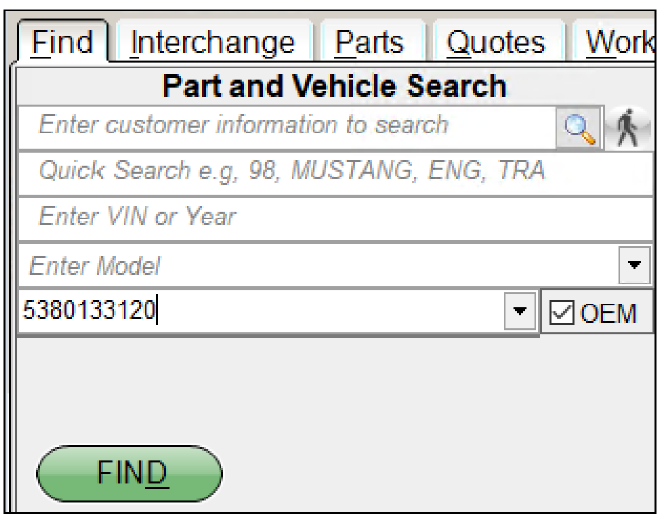
CrashLink Search

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



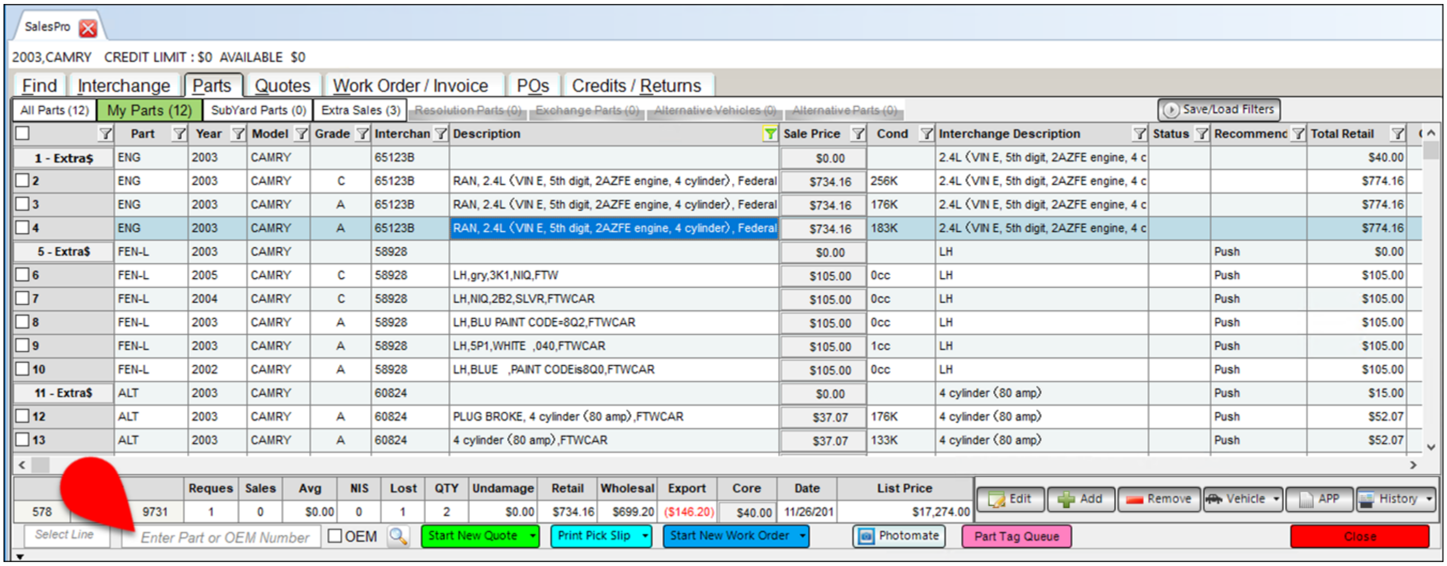
⚠ **Note:** Sales Pro also gives you the ability to perform CrashLink searches from the **Find** tab. With no other year/model/part information entered, follow these steps:

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.



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.



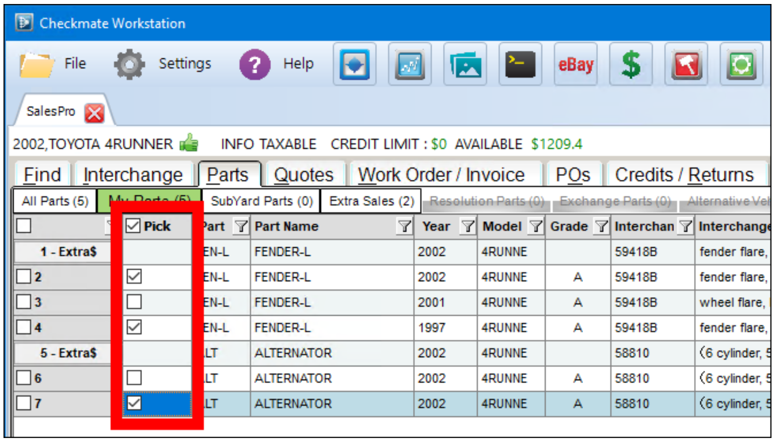
Print Pick Slip

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

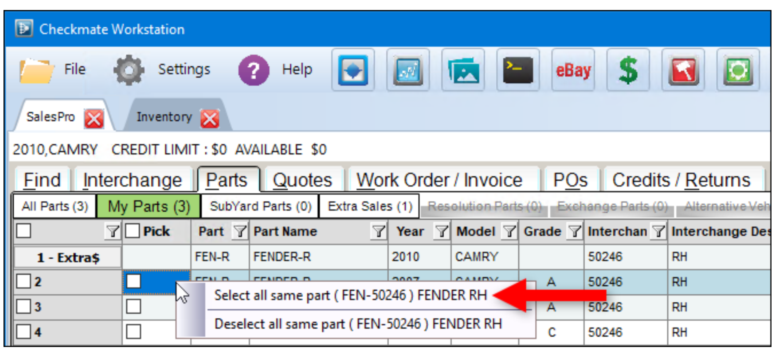
1. Determine which parts you want to print pick slips for. Options are:

    - **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.

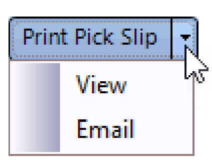


- **All same displayed parts** – To print pick slips for all the displayed parts that are the same, right-click on a checkbox in the **Pick** column and click the **Select all same part** option.
    - o For interchange parts, this puts a check in the **Pick** box for all displayed parts that have the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

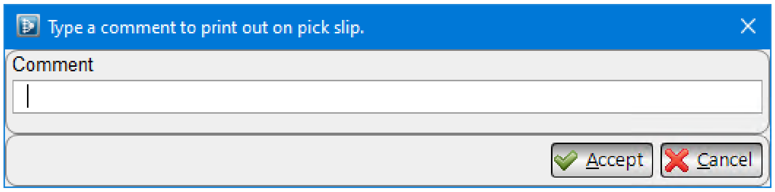


Print pick slips for all displayed parts – To print pick slips for all displayed parts, leave all boxes unchecked. When you click **Print Pick Slip**, each part on the screen will print on the pick slip.

- 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.

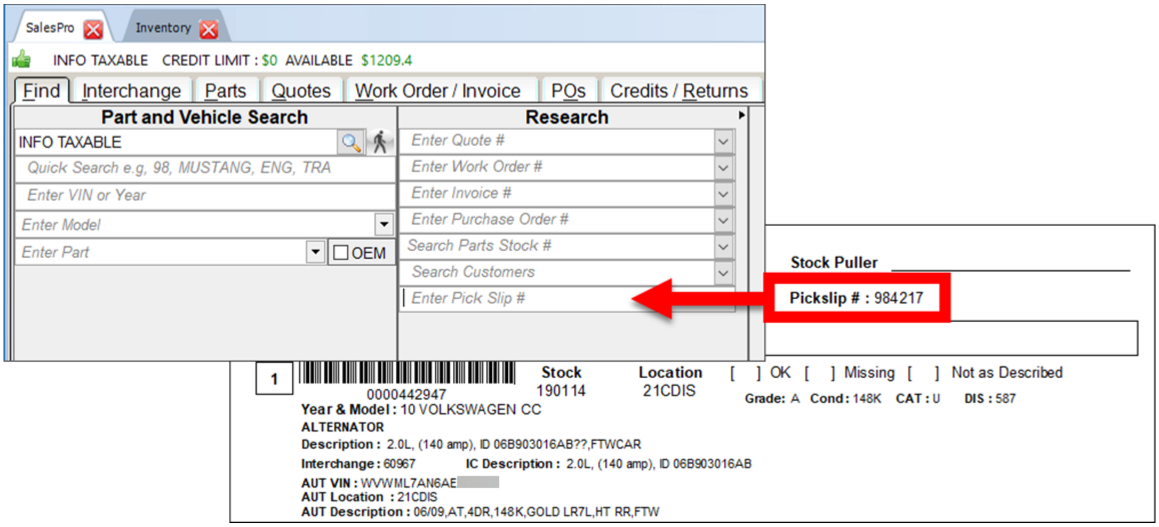


⚠ **Note:** Sales Pro also gives you the ability to print pick slips from the **Work Order/Invoice** tab. For more information about this tab, see the **Create Work Orders or Invoices (Work Order/Invoice Tab)** section of this guide.

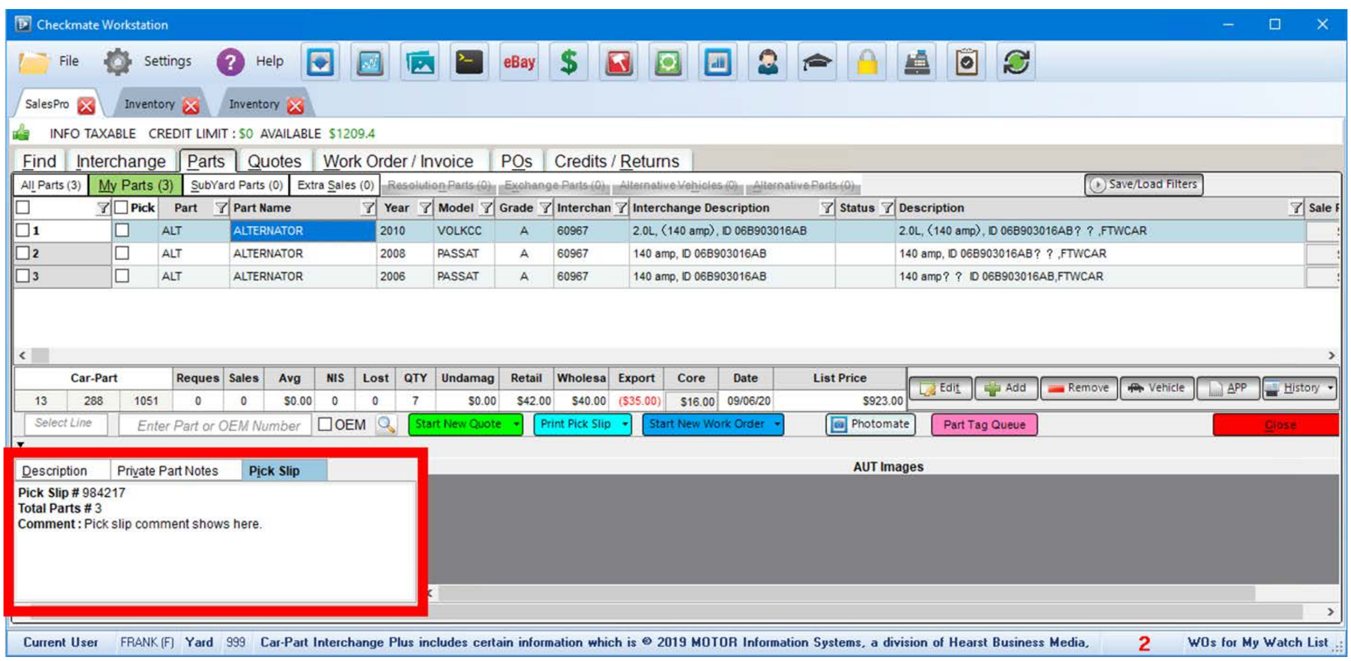
Look Up Pick Slips/Comments

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.



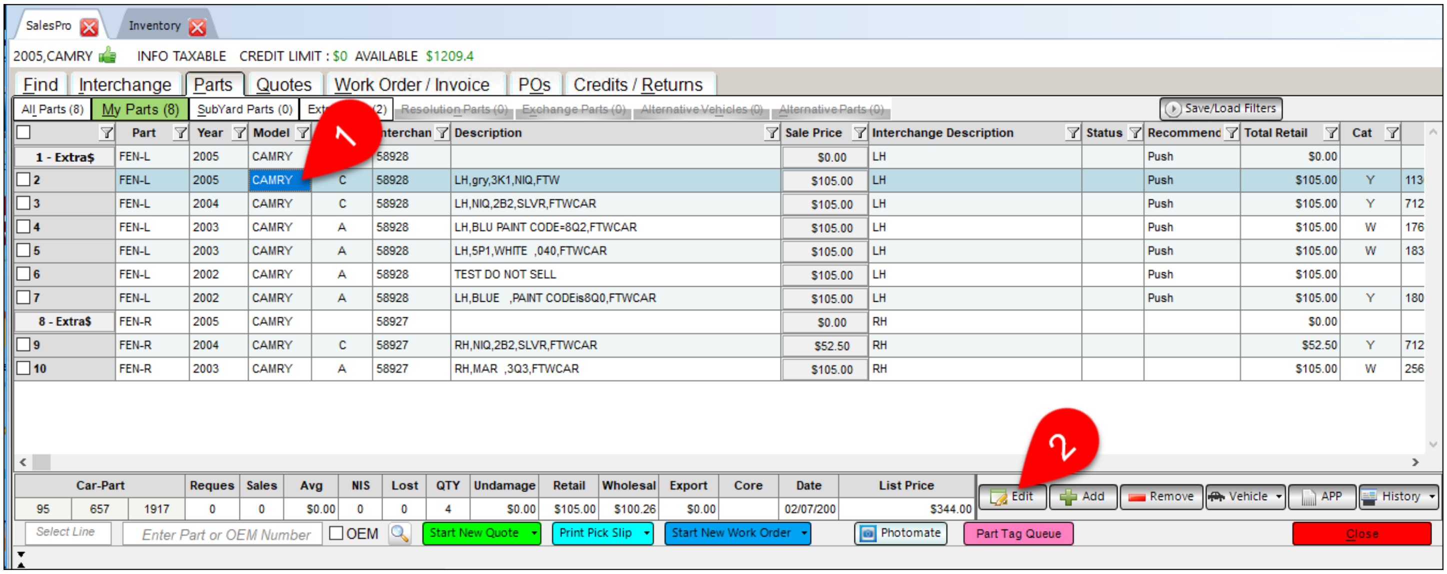
2. Press **Enter** on your keyboard. The parts on that pick slip display on the **Parts** tab. The pick slip information, including the pick slip comment, display in the bottom left corner on the **Pick Slip** tab.



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.



3. Checkmate Inventory Pro opens, displaying the **Part – Edit** tab. Use this screen to edit and save the part. For more information about editing a single part, or bulk editing multiple parts, refer to the Checkmate Inventory Pro User Guide*.

Edit AUT

AUT records cannot be edited in Sales Pro, they are edited in Checkmate Inventory Pro. For more information about editing AUT records, refer to the **Editing a Vehicle** section of the Checkmate Inventory Pro User Guide.

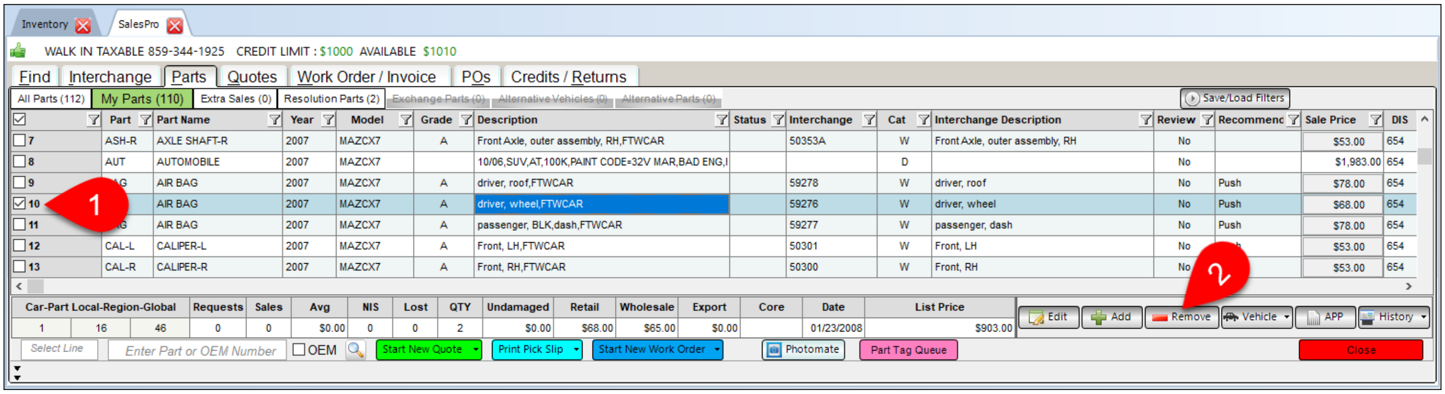
* You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

Remove/Delete Inventory

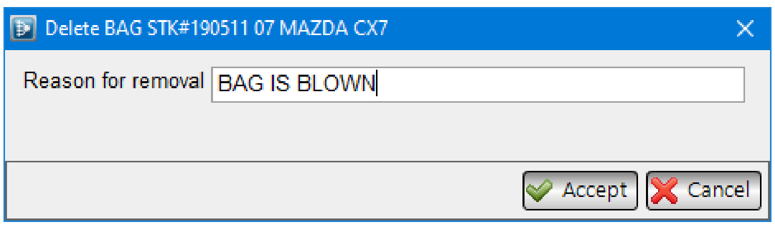
In Sales Pro, you can delete just one part at a time. Deleting multiple parts from inventory at a time is done in Inventory Pro.

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**.



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



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!

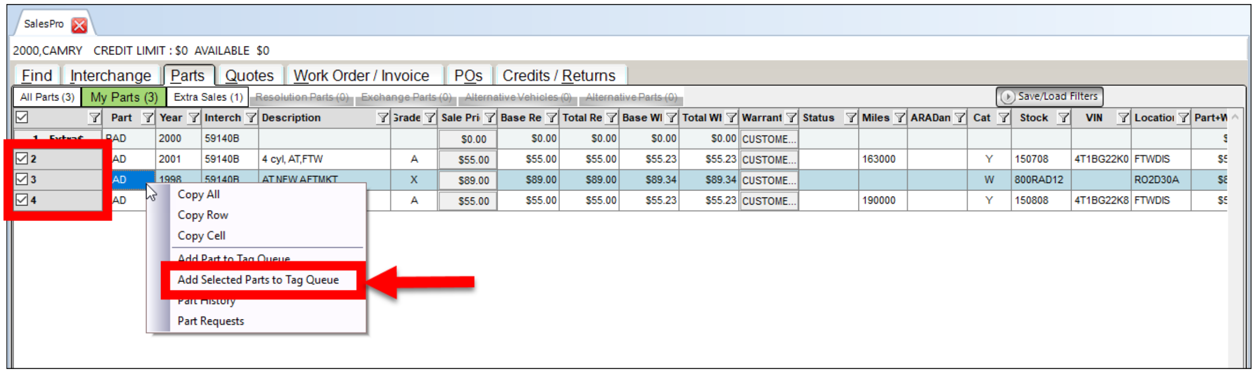
For more information about deleting multiple parts at one time, refer to the Checkmate Inventory Pro User Guide*.

* You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

Add Part Tags to Queue and Print Part Tags

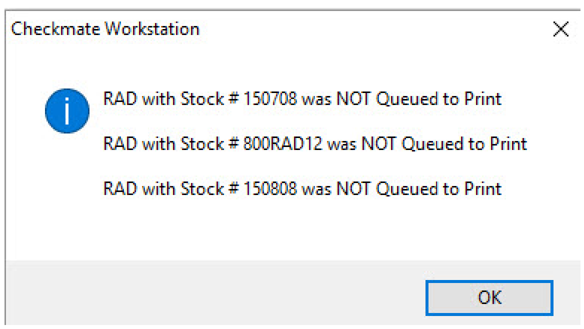
Sales Pro allows you to print all part tags that are currently in Checkmate's three-part tag file. To use this feature, follow these steps:

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**.

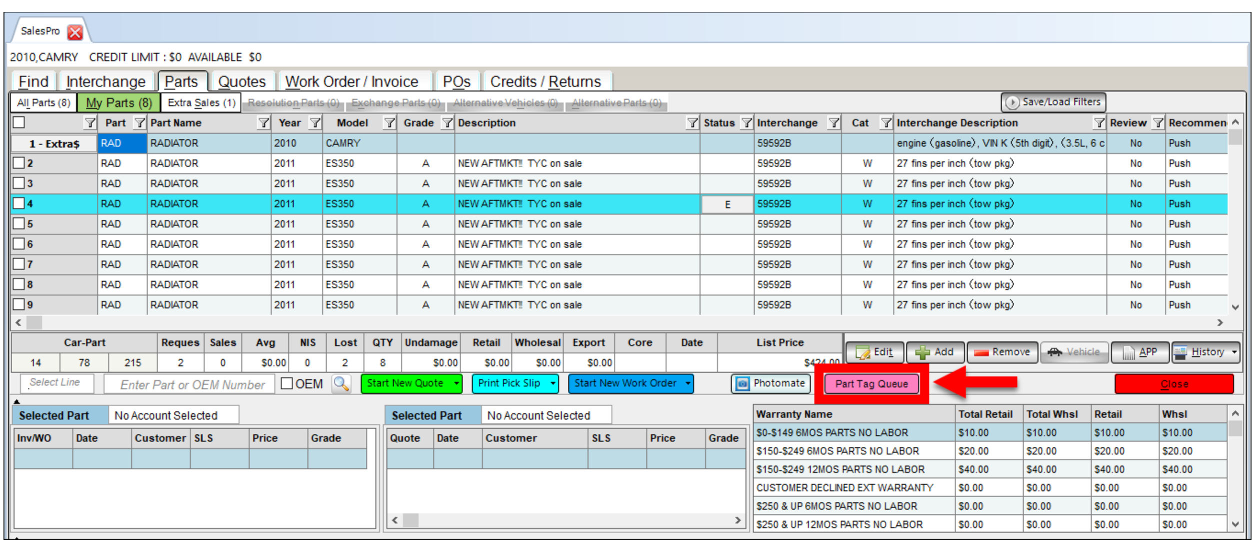


3. Sales Pro confirms that the part(s) have been added to the **Part Tag Queue**. Click **OK** to return to the search results.

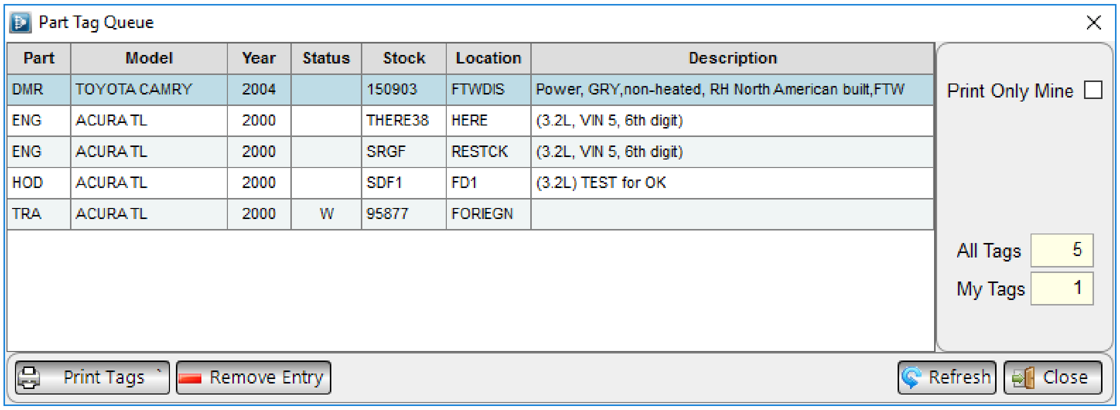
⚠ **Note:** If the selected part(s) have already been queued (perhaps by another employee), you will receive a notification that it was not queued to print. Click **OK** to close the window.



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

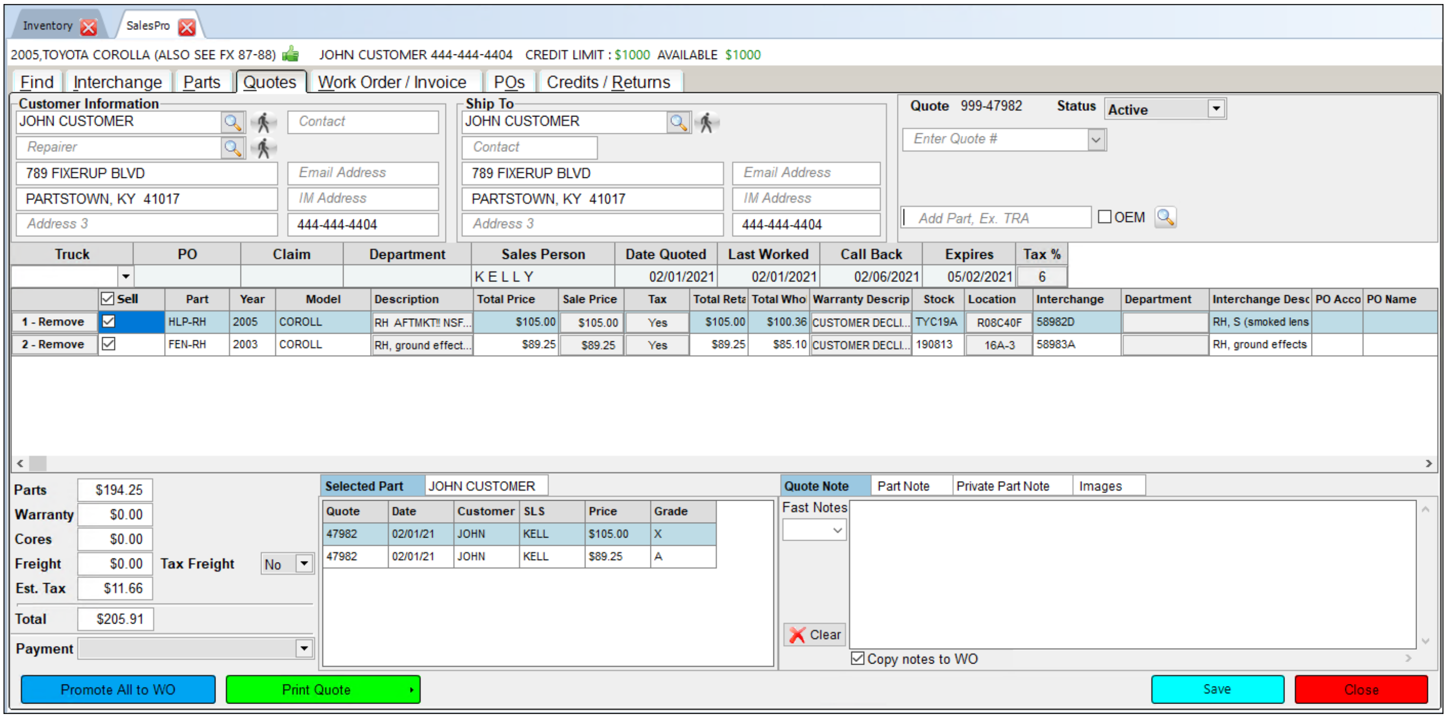
Click the **Freight Description** button. For more information, refer to **Appendix B: Pop-Up Windows.**

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.



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

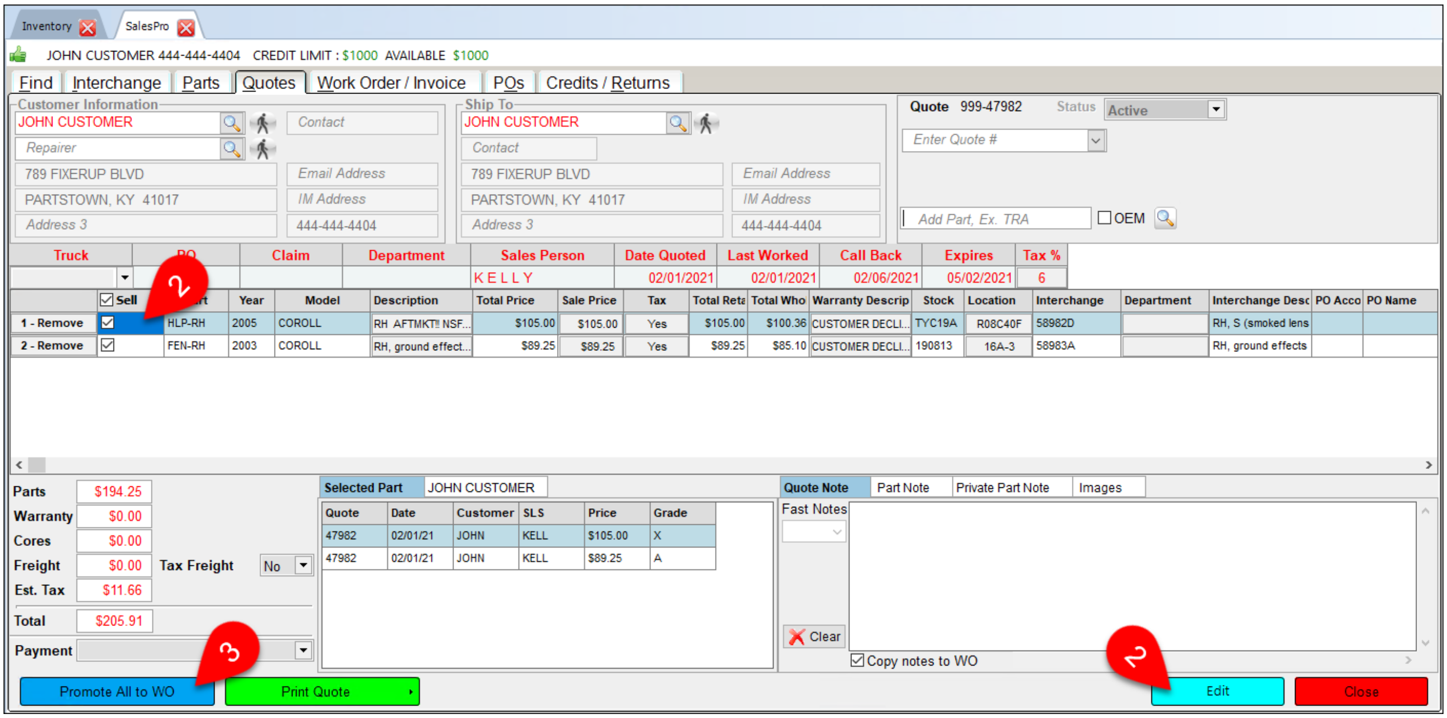
   ⚠ **Note:** Quotes created in Checkmate Sales Pro cannot be edited or promoted in Checkmate Retro.

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.



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

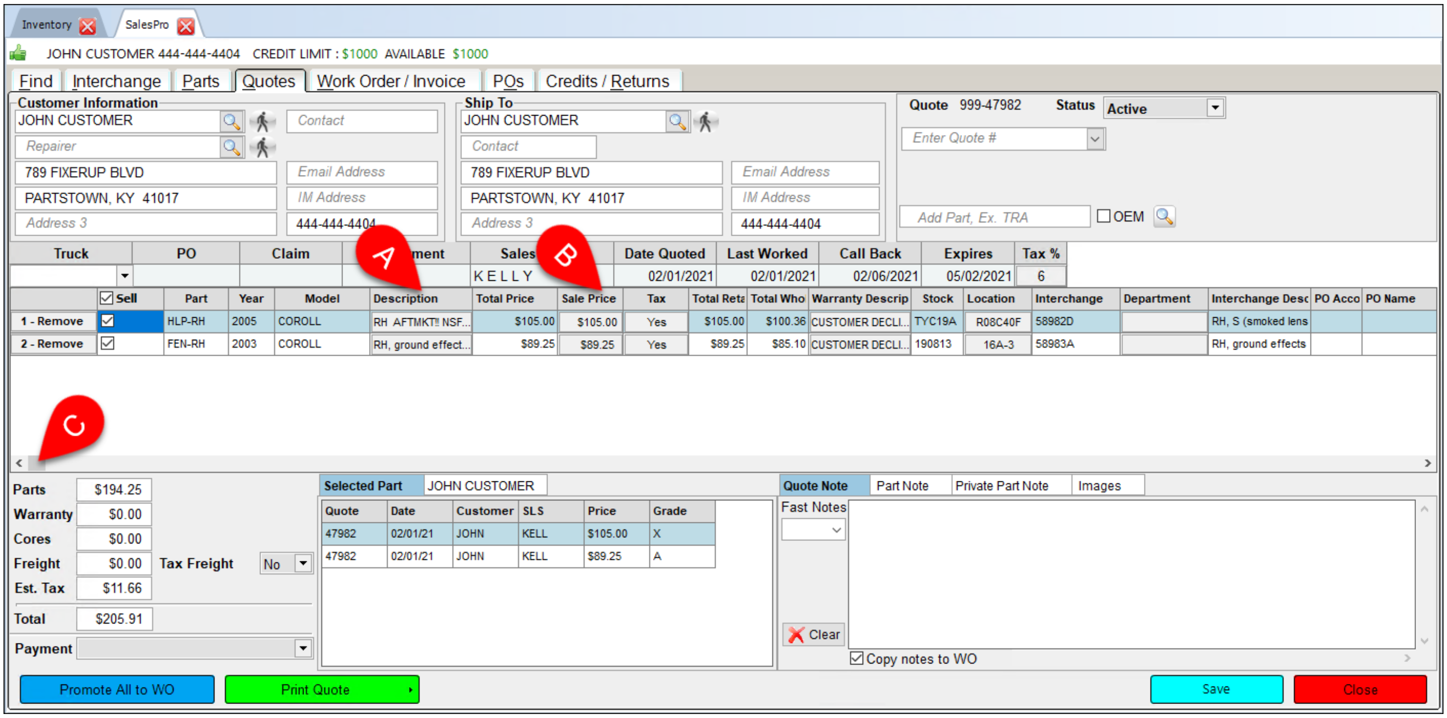
Customize Display

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

A. Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.

B. Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).

C. 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).



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.
    - o 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.
    - o Enter a **Part Note**. This will print with the highlighted part on the quote.
    - o If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the quote.*
    - o 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.
    - o 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.
    - o Click the camera button to assign the part to Photomate for photos. The part must be in inventory (i.e., not an extra sale).

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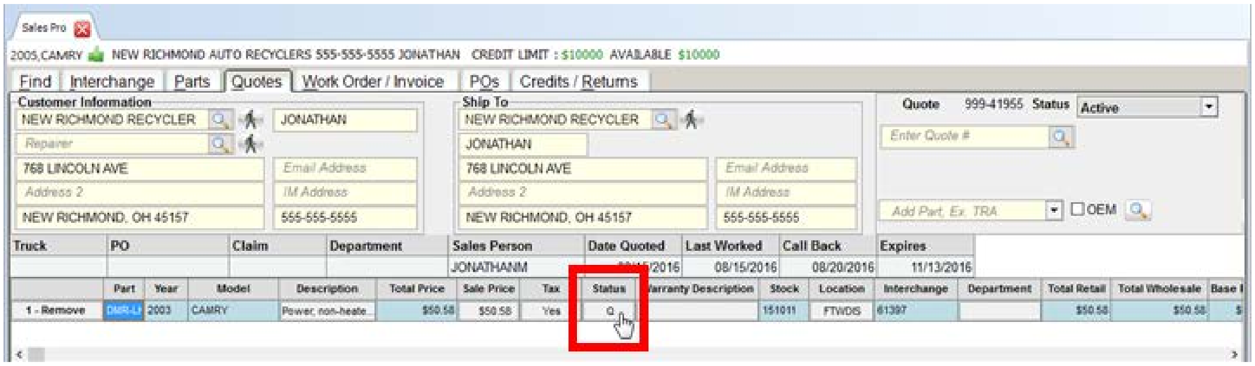
* Set up Fast Notes using the **Maintain Invoice Notes** function in Checkmate Retro (Full: **6,14** or Classic: **S20** or Junior: **6,8**).

- Use the **(I)nvoice notes** option to maintain the Fast Notes available on the **Quote Note** tab.
- Use the **(T)ext inserts** option to maintain the Fast Notes available on the **Part Note** tab.
  To have access to the **(T)ext inserts** option, the **Use Invoice Inserts** option must be set to **Y** in the **Change Invoicing** function (Full: **6,10,1** or Classic: **S3,1** or Junior: contact support).

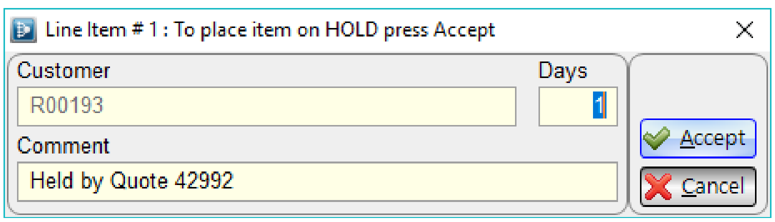
Put Parts on Hold

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.

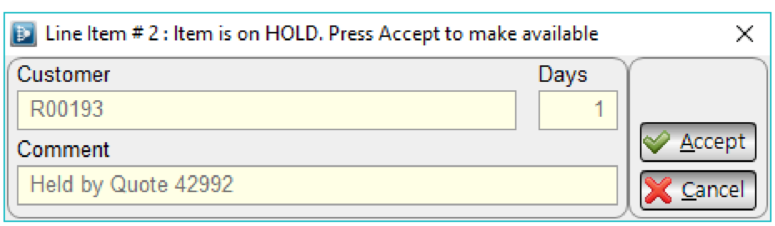


3. The **Line Item** window opens. This window includes three text fields:
   - **Customer** – Displays the customer on the quote
   - **Days** – Number of days the part should be on hold
   - **Comment** – Allows you to add a comment
4. Edit the information in this window, then click **Accept** to put 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; they display orange. 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**.



Parts on hold do not show online in Car-Part.com marketplaces.

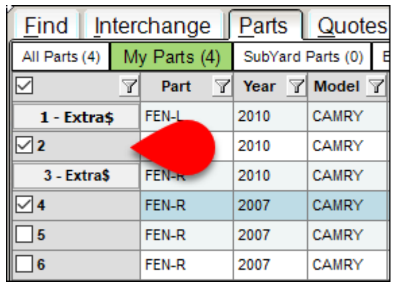
Create Work Orders or Invoices (Work Order/Invoice Tab)

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.

⚠ **Note:** Parts on work orders and invoices do not show online in Car-Part.com marketplaces.

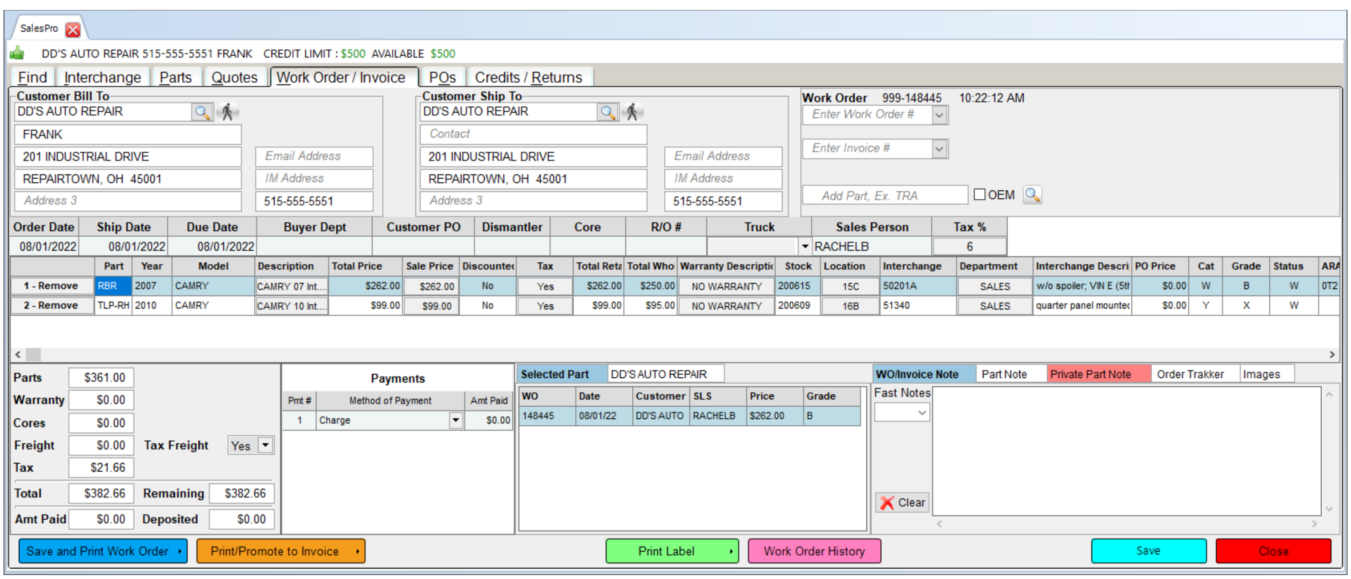
To create a work order and promote it to an invoice:

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**.



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

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



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.

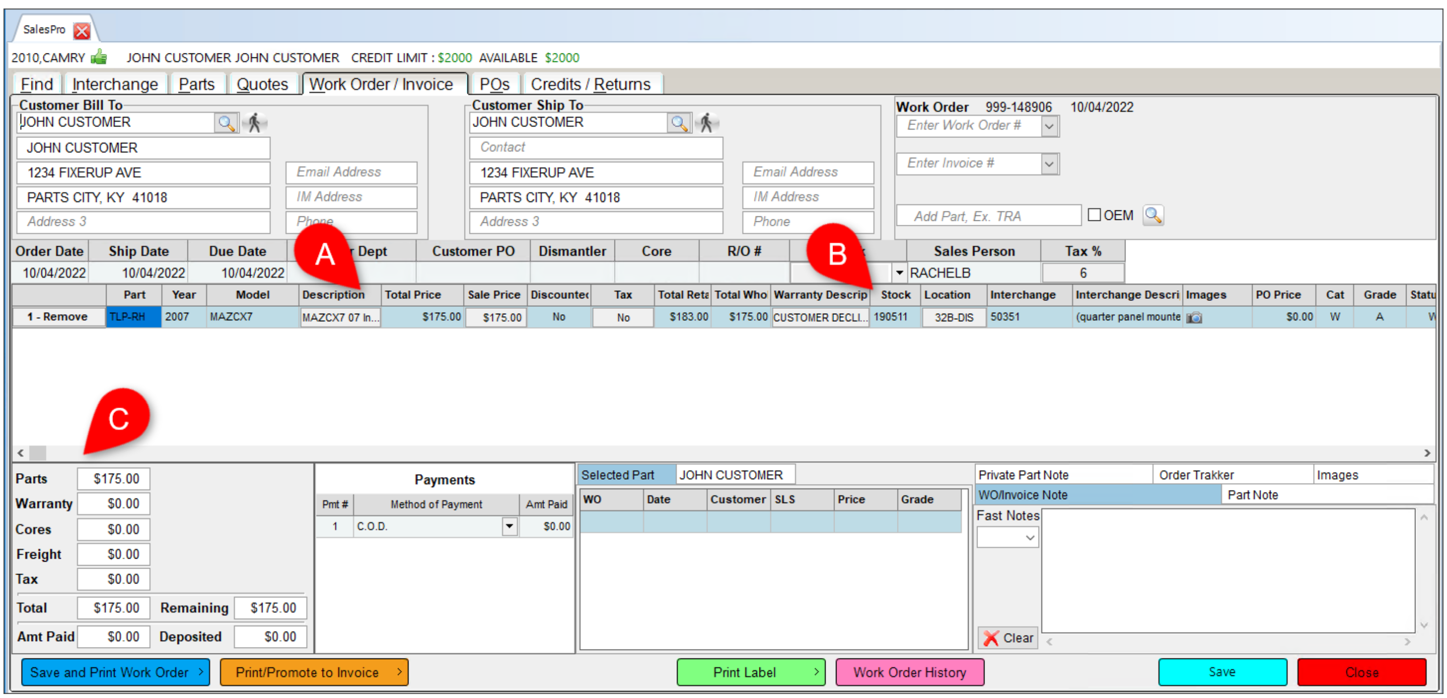
Customize Display

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

A. Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.

B. Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).

C. 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).

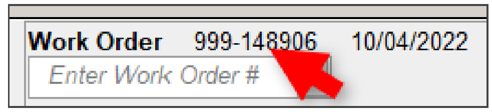


Editing Work Orders

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.

  Double-click the work order number to copy it to your clipboard. It is then available to paste the work order number anywhere.

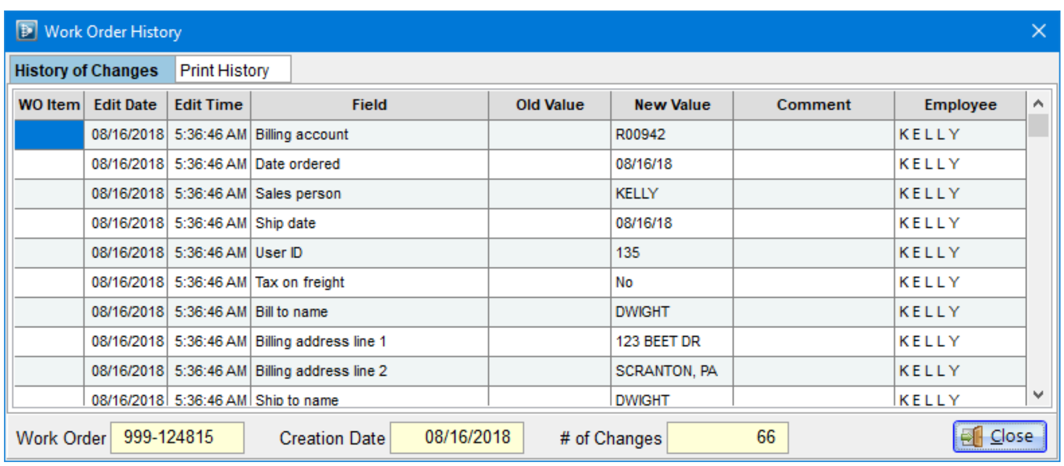


- Use the **Add Part** field to add another part to the work order.
- Add information to the **Ordering**, **Customer PO**, **Dismantler**, **R/O#, Truck**, **Discount %,** and **Tax %** fields, if applicable.
  - o **Ordering** – Department that is buying the part
  - o **Customer PO** – Buyer's PO number
  - o **Dismantler** – Name of the employee who will dismantle the vehicle
  - o **Core** – Core status
  - o **R/O#** – Insurance claim number
  - o **Truck** – Truck delivering the part
  - o **Discount %** – Discount amount that is being applied
  - o **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:
  - o **Copy** part information
  - o **Print Pick Slip**
  - o **Print Shipping Labels**
  - o **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.
  - o 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**.**
    - o If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the work order/invoice.[*]
    - o **WO/Invoice Notes**, **Part Notes**, and **Order Trakker** notes will be included on the work order/invoice.
    - o 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.
    - o **Order Trakker**: Refer to the **Order Trakker Tab** section of this guide, below.
- View images for the selected part on the **Images** tab. Double-click an image thumbnail to open the image in the **Image Viewer** window.

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**.
    - o 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.



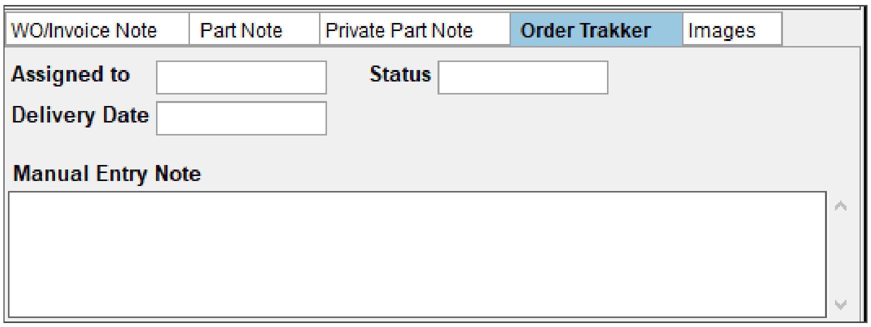
[*] Set up Fast Notes using the **Maintain Invoice Notes** function in Checkmate Retro (Full: **6,14** or Classic: **S20** or Junior: **6,8**).

- Use the **(I)nvoice notes** option to maintain the Fast Notes available on the **WO/Invoice Note** tab.
- Use the **(T)ext inserts** option to maintain the Fast Notes available on the **Part Note** tab.
  To have access to the **(T)ext inserts** option, the **Use Invoice Inserts** option must be set to **Y** in the **Change Invoicing** function (Full: **6,10,1** or Classic: **S3,1** or Junior: contact support).

Order Trakker Tab

The **Order Trakker** tab shows information for the selected part regarding the production status of the part in Order Trakker.

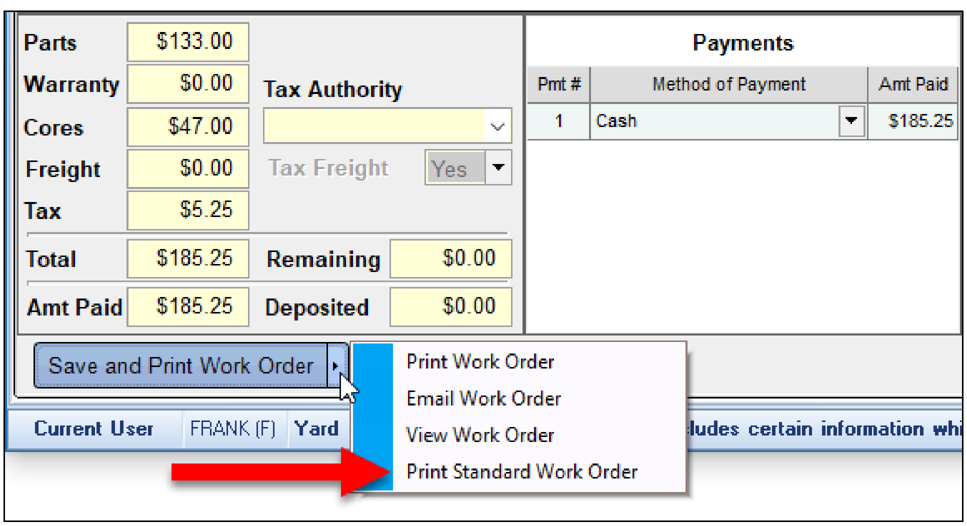
- **Assigned to** – Displays what's selected for this part in the **Assigned** field in Order Trakker.
- **Status** – Displays the queue tab the part is currently on in Order Trakker.
- **Delivery Date** – Displays the **Delivery Date** that was set for this part in Order Trakker (if no date has been set, this field will be blank).
- **Manual Entry Note –** This note is linked to the **Manual Entry** field in Order Trakker. If you edit the note in Sales Pro, the note automatically updates in Order Trakker.



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.)



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** or Checkmate Classic: **S3,1** or Checkmate Junior: contact support)

Changing Parts on Work Orders

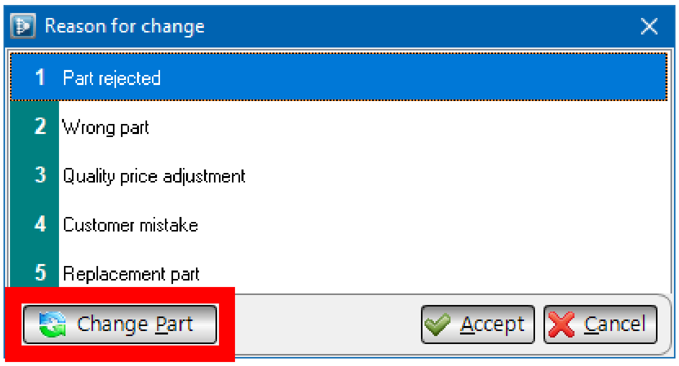
You can quickly change an Extra Sale part on a work order. Use this feature if you wish to remove the part on the work order and replace with another part.

⚠ **Notes:**

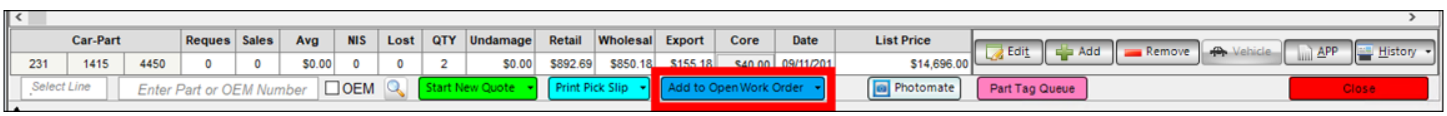
- This option is not available on posted invoices
- This option can be used to replace **Extra Sale** parts, but it is *not* available for **Exchange Sale** parts.

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.

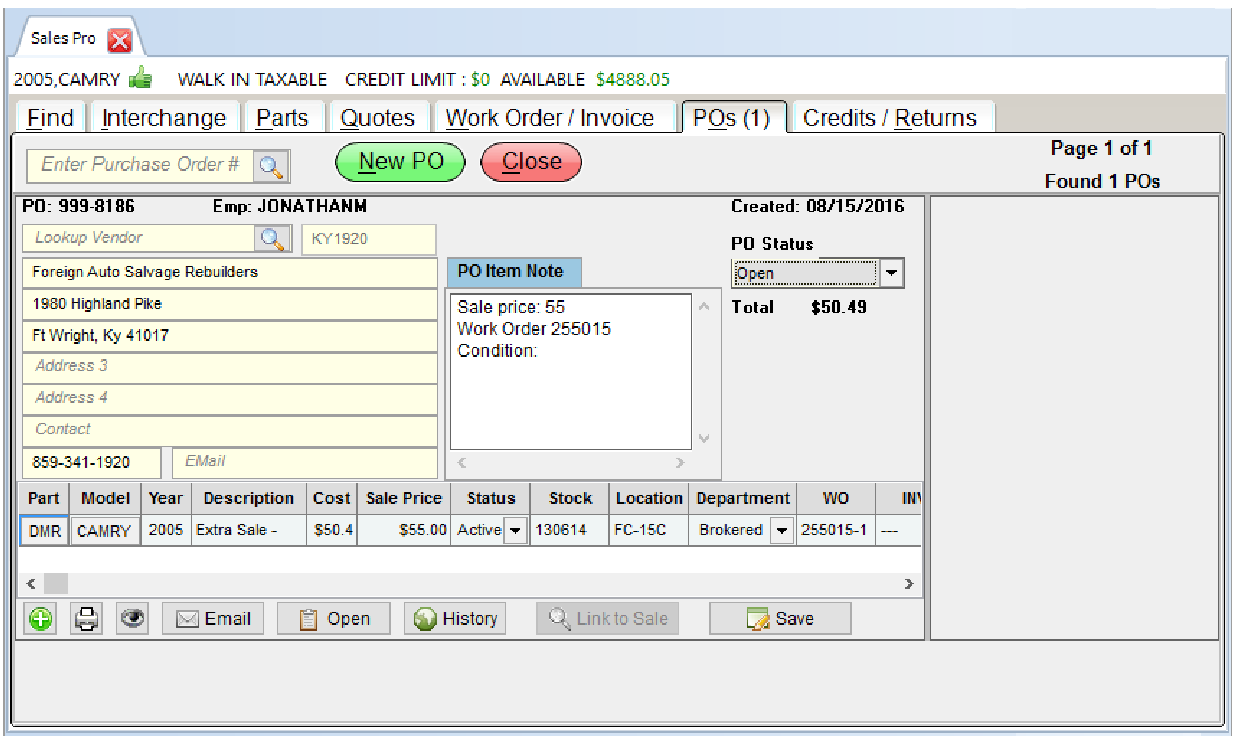
Create Purchase Orders (POs Tab)

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.

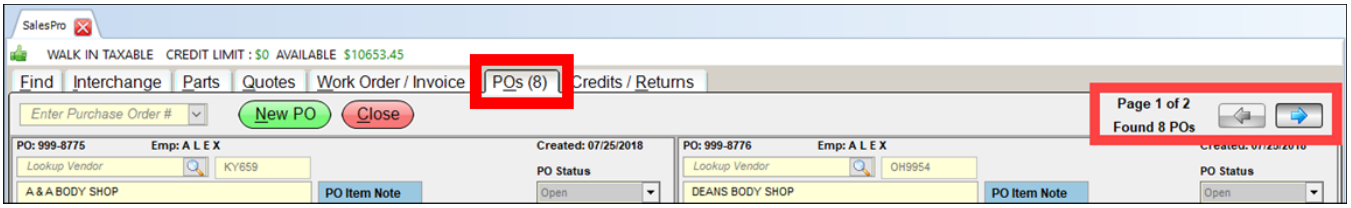


From here, you can take the following actions:

- 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

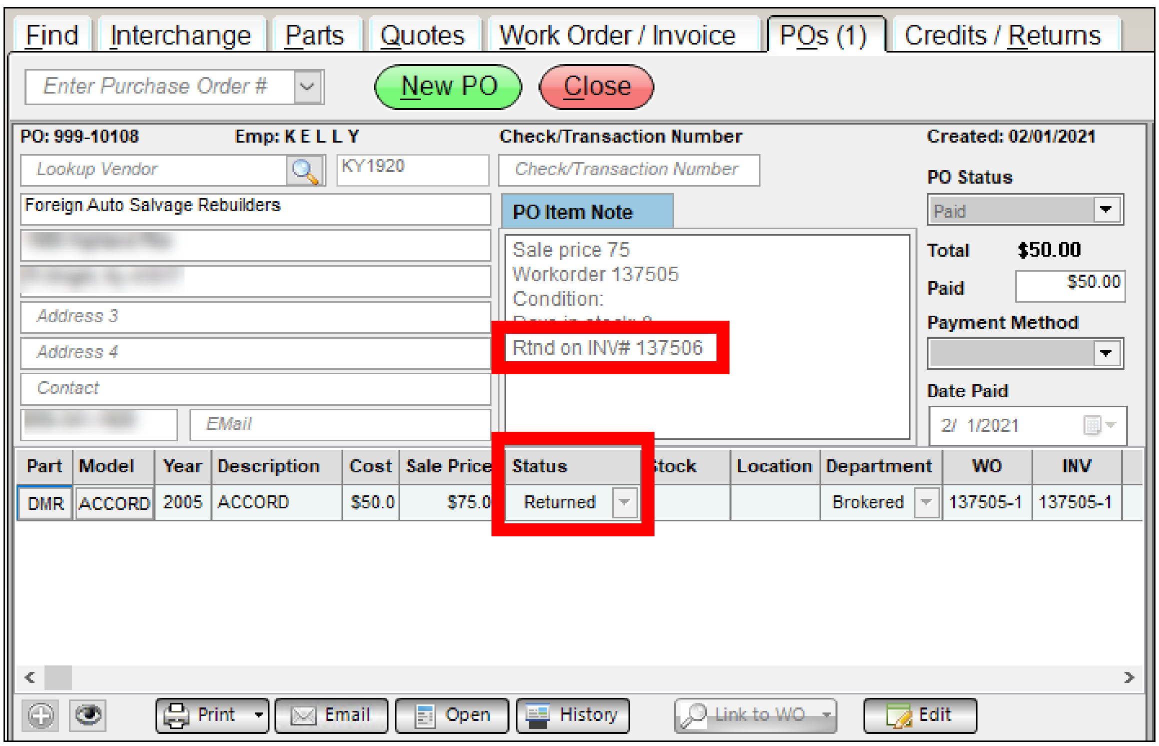
On the **POs** tab, the number of purchase orders that are currently displayed, will show on the tab itself and in the upper right-hand corner. If more than four purchase orders are displayed, blue arrow buttons will be available to page through the purchase orders.



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:

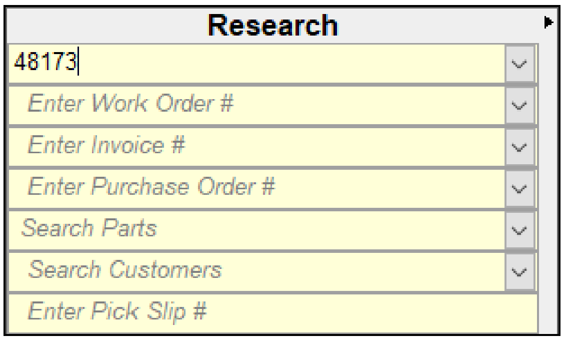
1. Enter the information, such as the quote number, to search for that item.
2. Perform an advanced search for the item by other details, such as date and salesperson, by clicking the drop-down arrow.

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

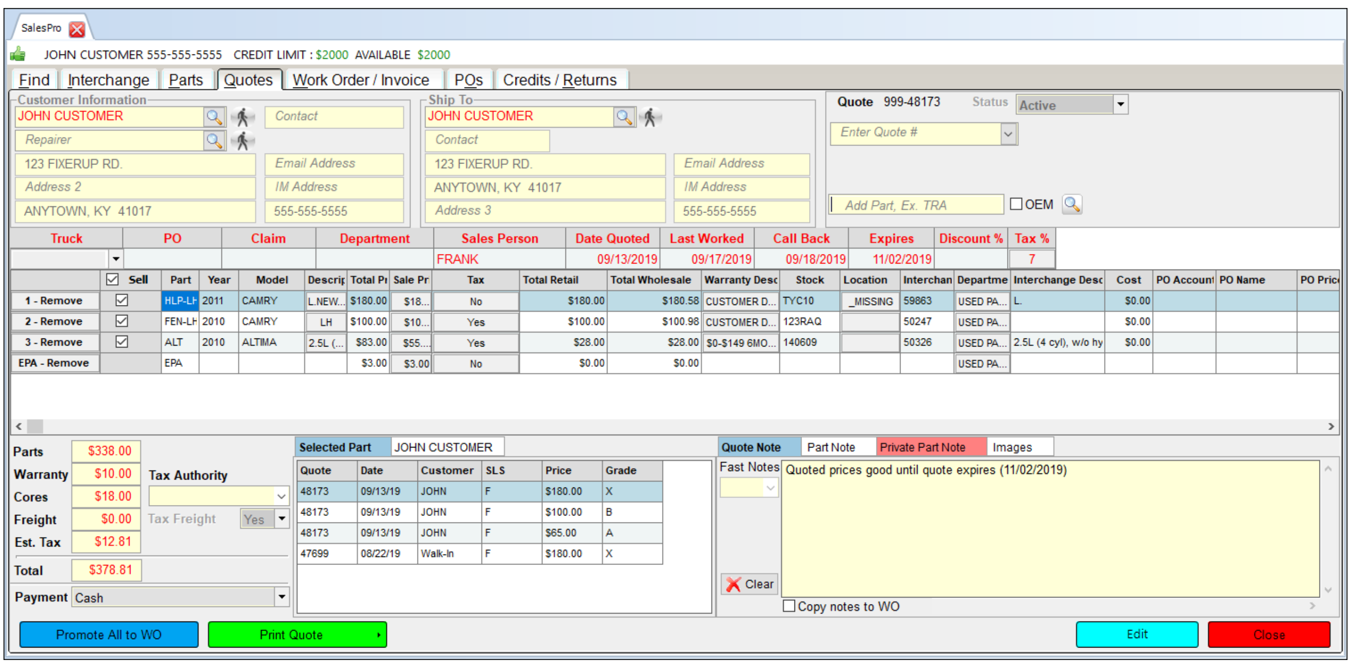
Enter Information

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.



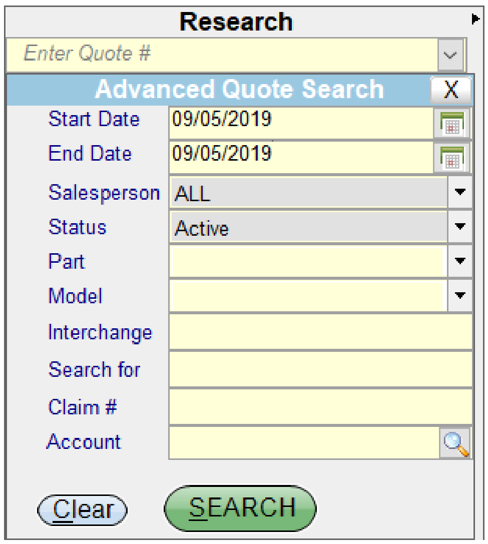
Advanced Search for an Item

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.

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

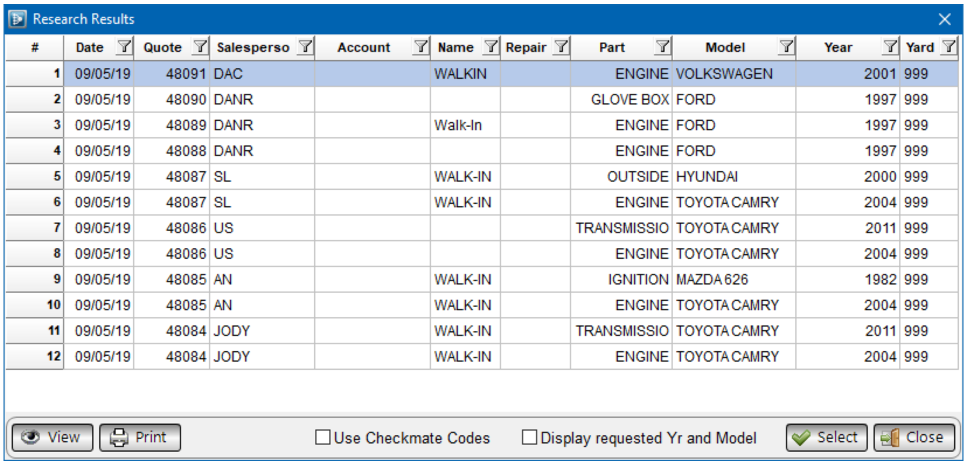
- Use the calendar icon buttons ( ) to select a date, or enter a date in the MM/DD/YYYY format.



- 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 # Interchange (or type *U* to search for Resolution Parts)	Interchange Description Description Condition Location
Customers	Account Name Address Phone	Terms Comment Shipping Address

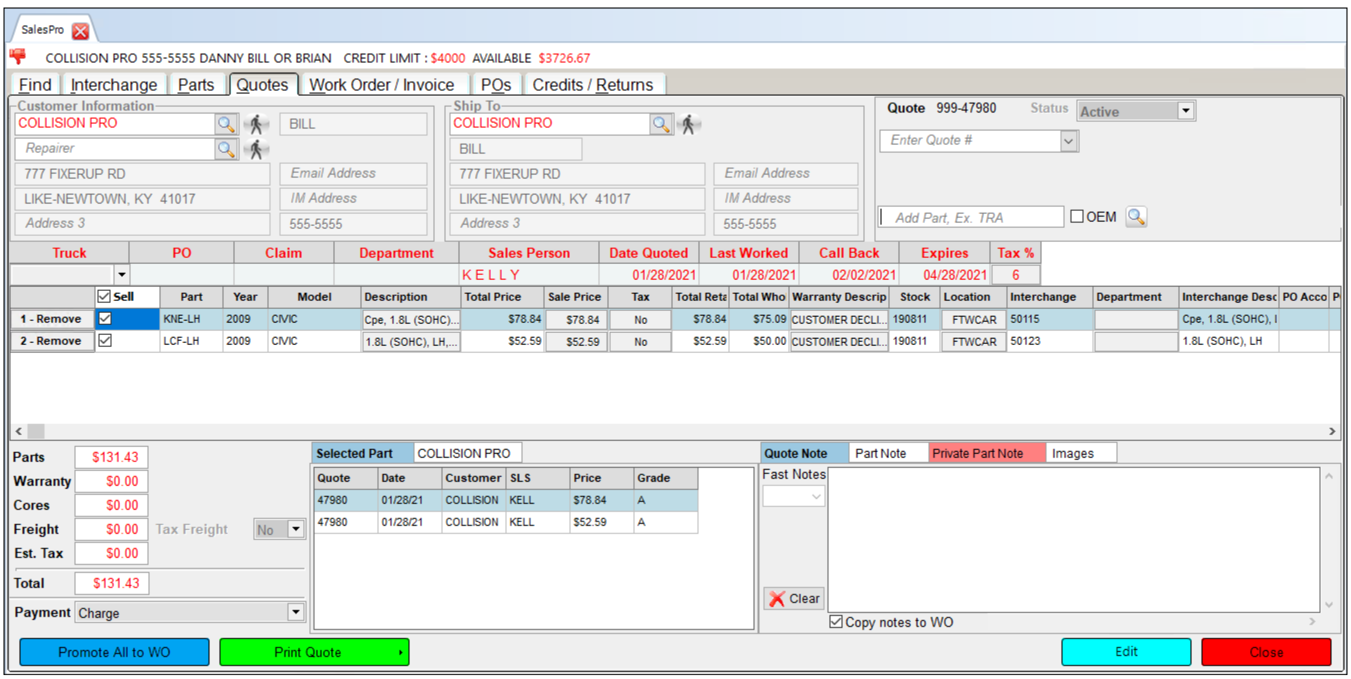
3. Click **Search**. The **Research Results** window opens.



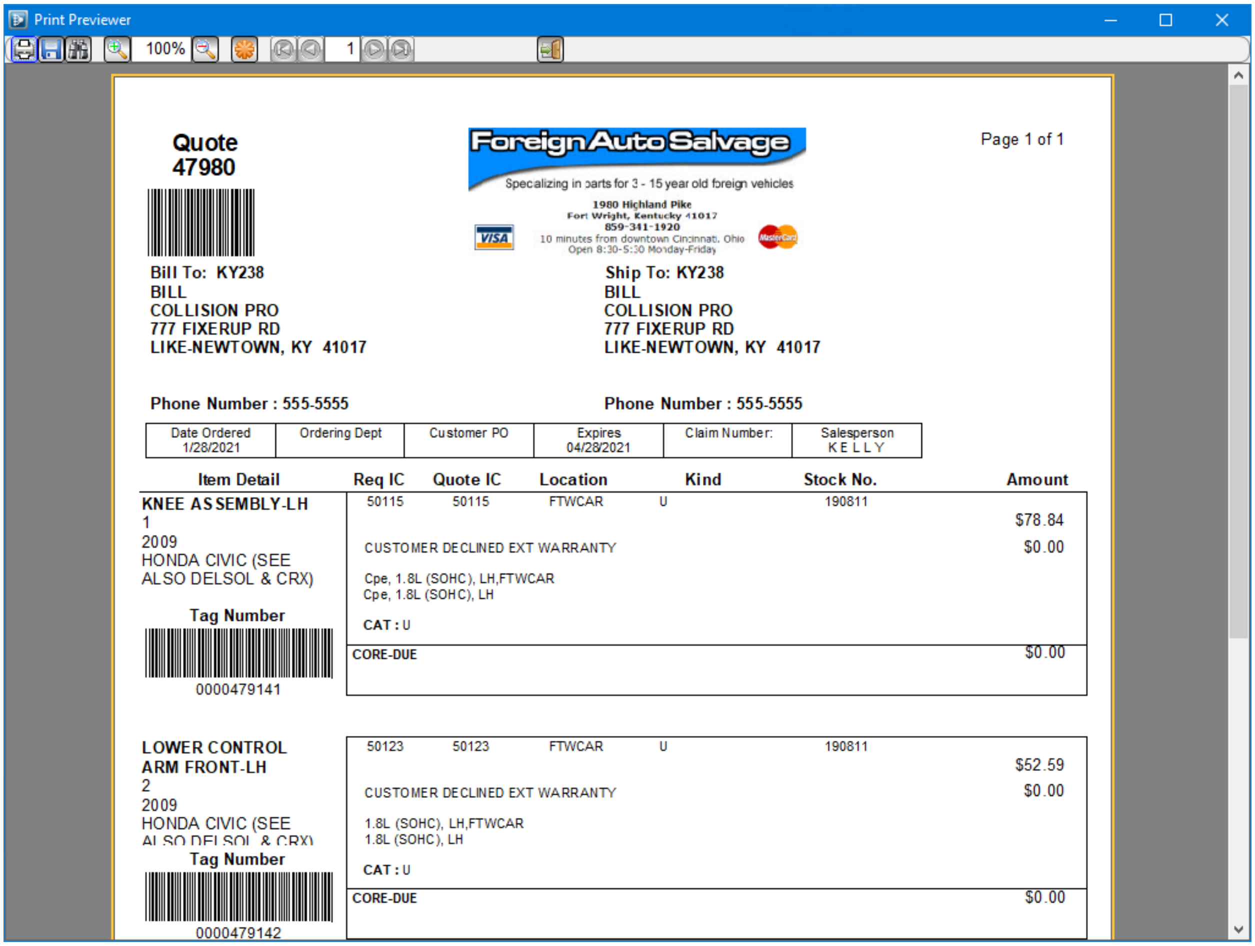
4. From here, you can:

   - 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**.

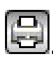
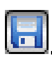
5. If you clicked **Select**, the quote will open on your screen.

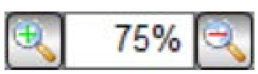


If you clicked **View**, a preview of the quote appears.



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.

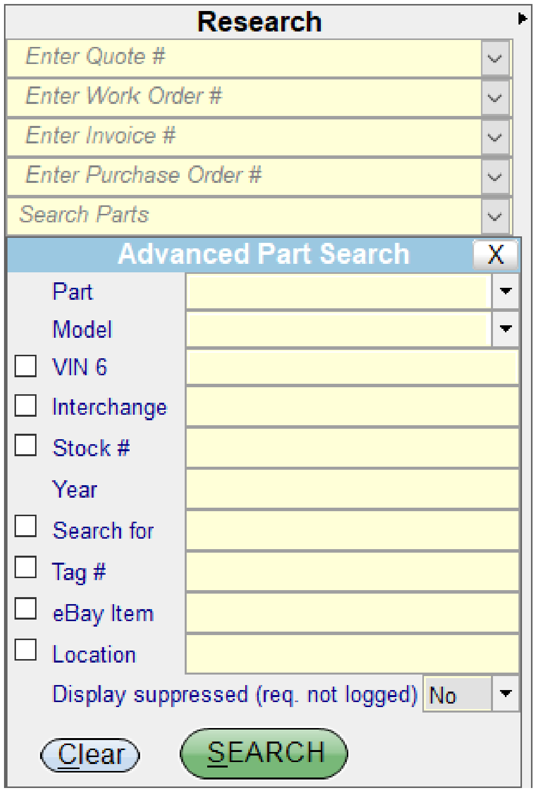


- Edit the **Page Settings**, such as page orientation and margins, by clicking .
- Use the single arrow buttons to view the **Prior Page** or **Next Page**.

- 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.



- **Location** – Type a location to search for parts in a single location, or:
  - o 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 **WO2*** to search for all parts in the second aisle of your warehouse.
  - o 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 being with '9B' and end in 'A.'

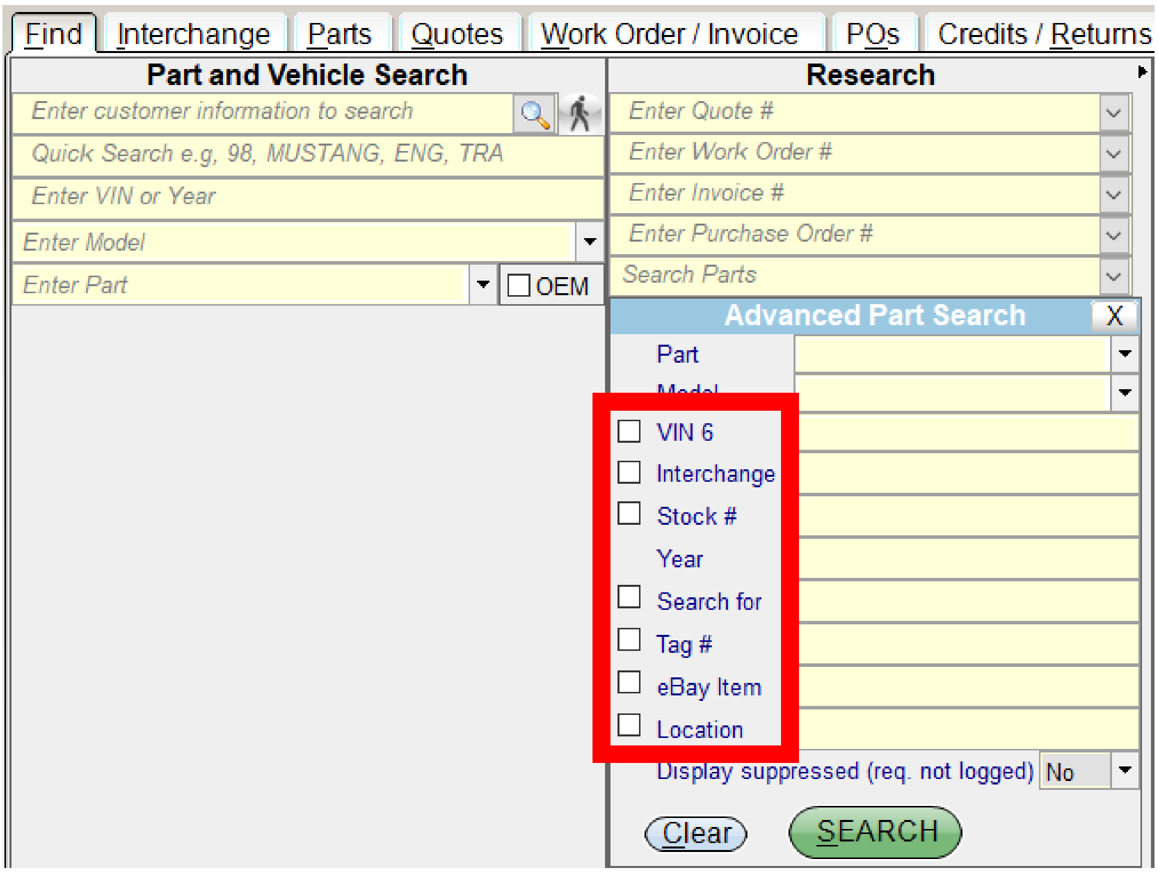
Display Suppressed (req. not logged) – To include suppressed parts in search results, set this field to **Yes**. Suppressed parts are those that are set to not display in regular search results[*]. This could be for a variety of reasons (i.e., the part is in review or the vehicle has not been cleared). 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** or Checkmate Classic: **S3,15** or Checkmate Junior: contact support)

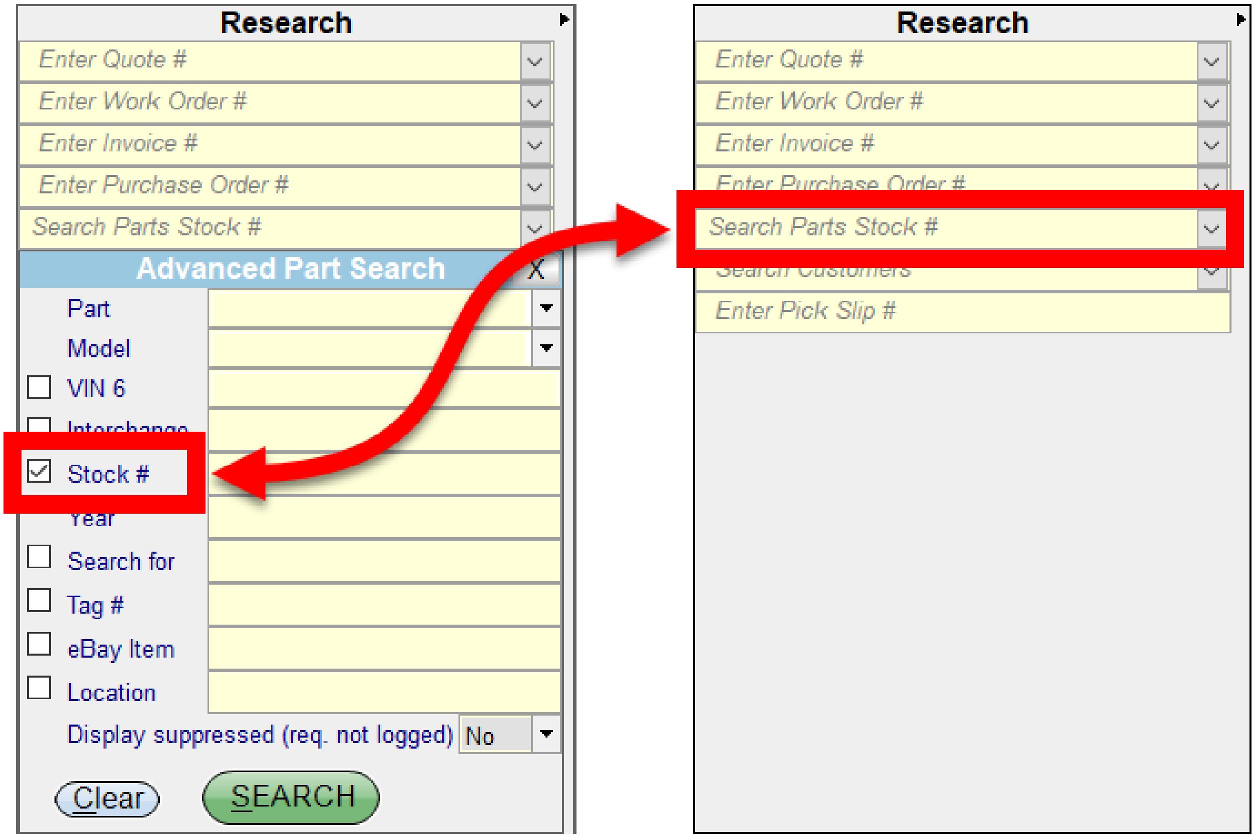
Save Search Option for Advanced Part Search

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.



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

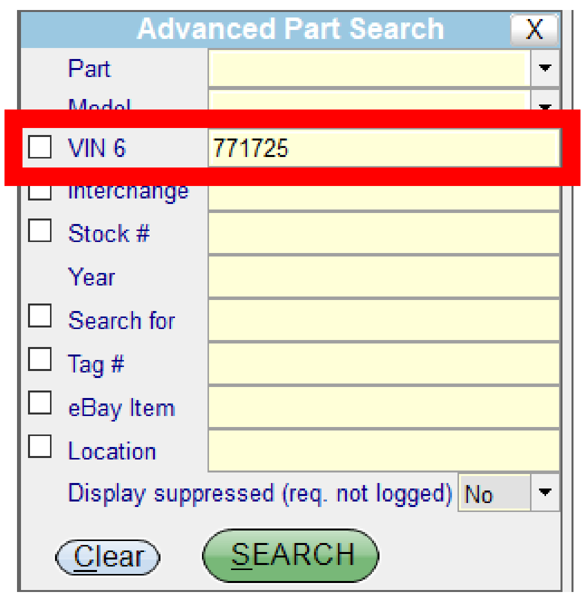
In the **Research** section of the **Find** tab, you can search for a part by using only the last 6 digits of a VIN. With this feature, you can locate all parts in your inventory that are from a VIN ending in those last 6 digits.

To find parts using this feature, follow these steps:

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

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.



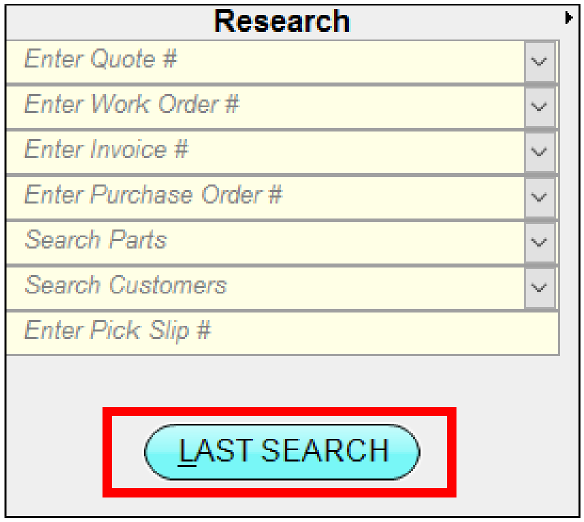
The **Parts** tab opens with the results of your search.

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:**

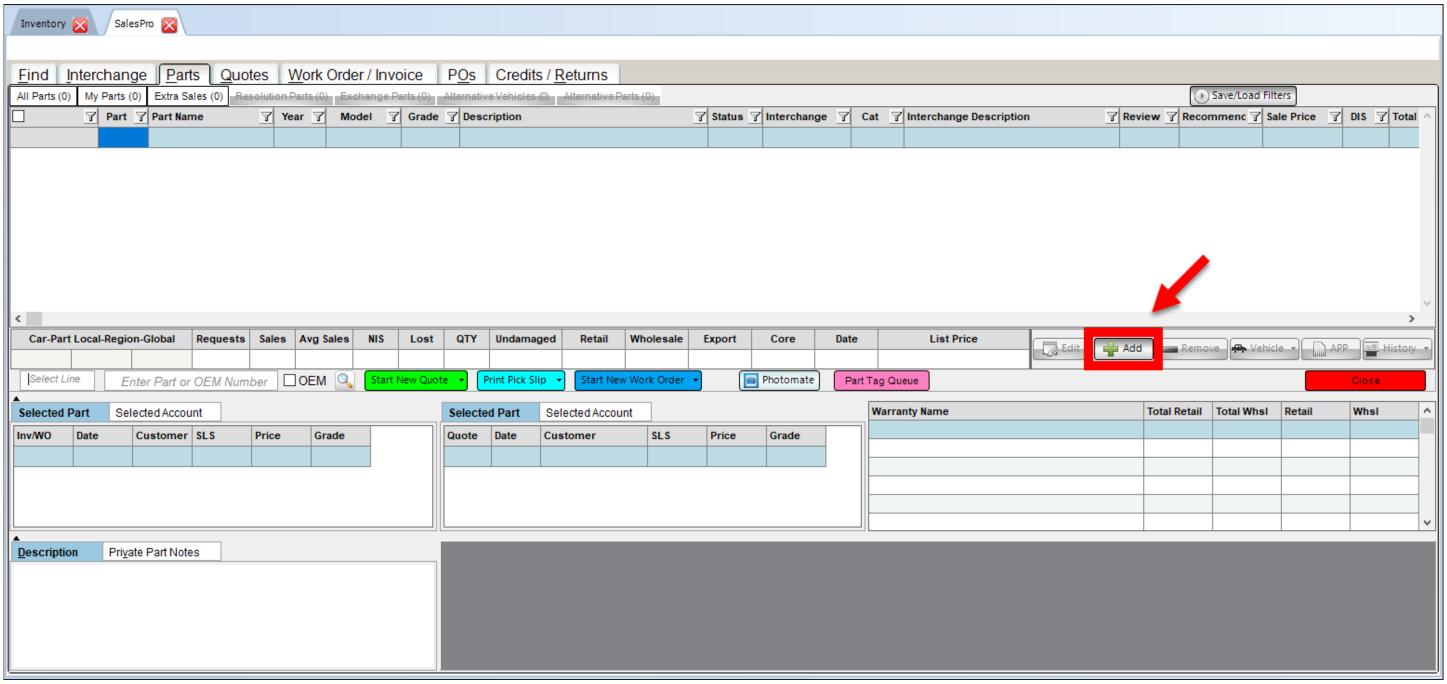
- The **LAST SEARCH** button can *only* duplicate Advanced Searches (i.e., searches using the drop-down arrow button).
- When you close Sales Pro, the information about your last search is lost. When you re-open Sales Pro, this button will not be active until a new search is performed.



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**.



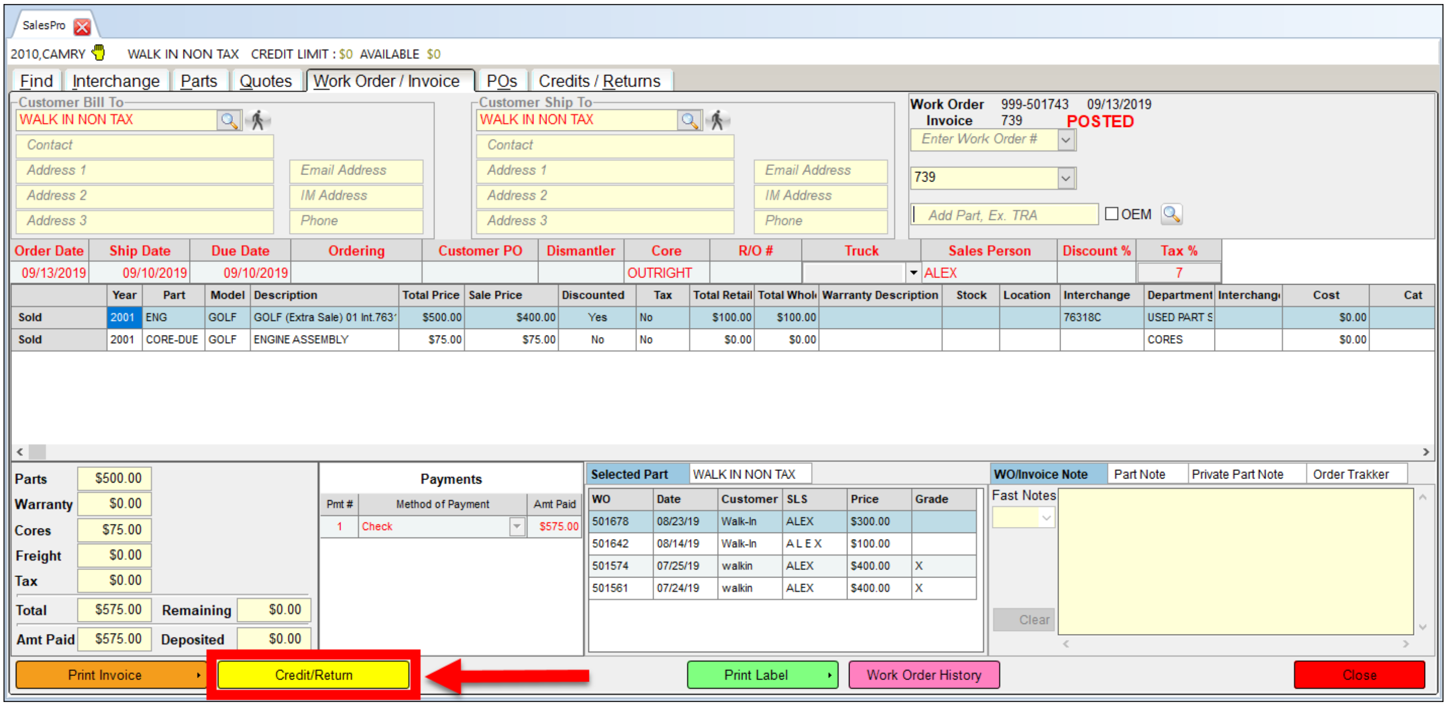
Inventory Pro opens, displaying the **Part – Add** tab. Use this screen to add the part. For more information about this process, refer to the Checkmate Inventory Pro User Guide*.

* You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

Credit and Return Parts (Credits/Returns Tab)

To credit or return a part:

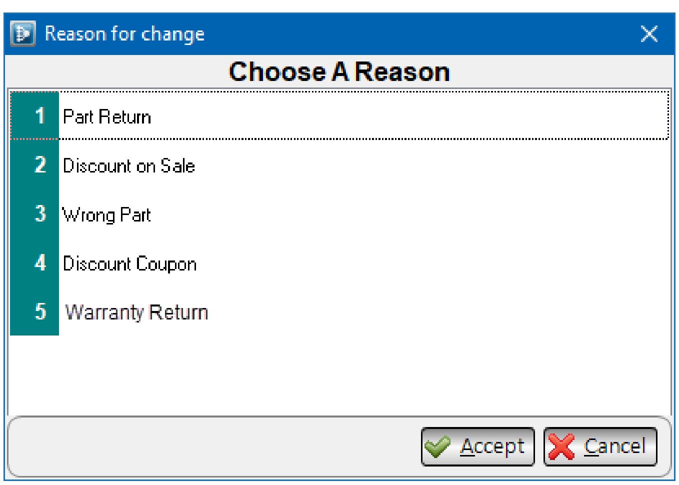
1. Use the **Research** section of the **Find** tab to look up the invoice.
2. The **Work Order/Invoice** tab opens with the invoice. Click the **Credit/Return** button at the bottom of the invoice.



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**.

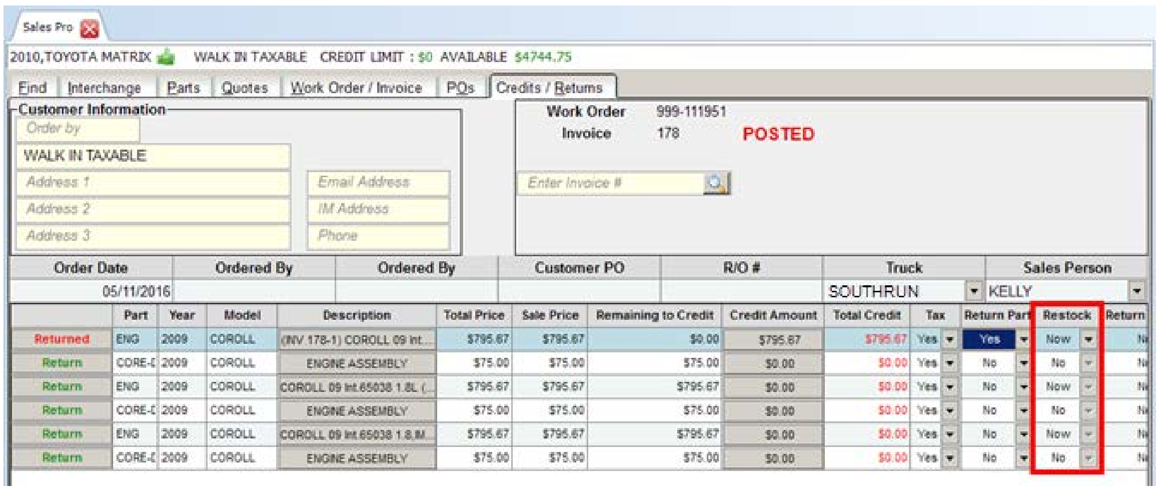


5. Locate the **Restock** column. (You may need to scroll horizontally to find it.)

   - If a part was an extra sale that didn't have an inventory record created, the **Restock** field will not be available.

   Use the drop-down in this column to choose when to restock the part:[*]

   - **No** – The part will not be added back to inventory.
   - **Now** – When you've finished processing the return in Sales Pro, Inventory Pro will open for you to restock the part.
   - **Later** – The part will be moved to the restock file[†]. Depending on your settings, the part may be given a status of **H** (Hold).



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.

   - **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.

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[*] Settings for restocking can be accessed in Checkmate Retro using the **Change Invoicing** function (Checkmate Full: **6,10,1** or Checkmate Classic: **S3,1** or Checkmate Junior: contact support.)

[†] You can restock the part in Checkmate Inventory Pro using the **RESTOCK** view, or in Checkmate Retro using the **Restocking** function: (Checkmate Full: **5,12,19** or Checkmate Classic: **V12,19** or Checkmate Junior: **5,12,19**).

9. If the **Restock** column was set to **Now** for any part, Checkmate Inventory Pro 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.

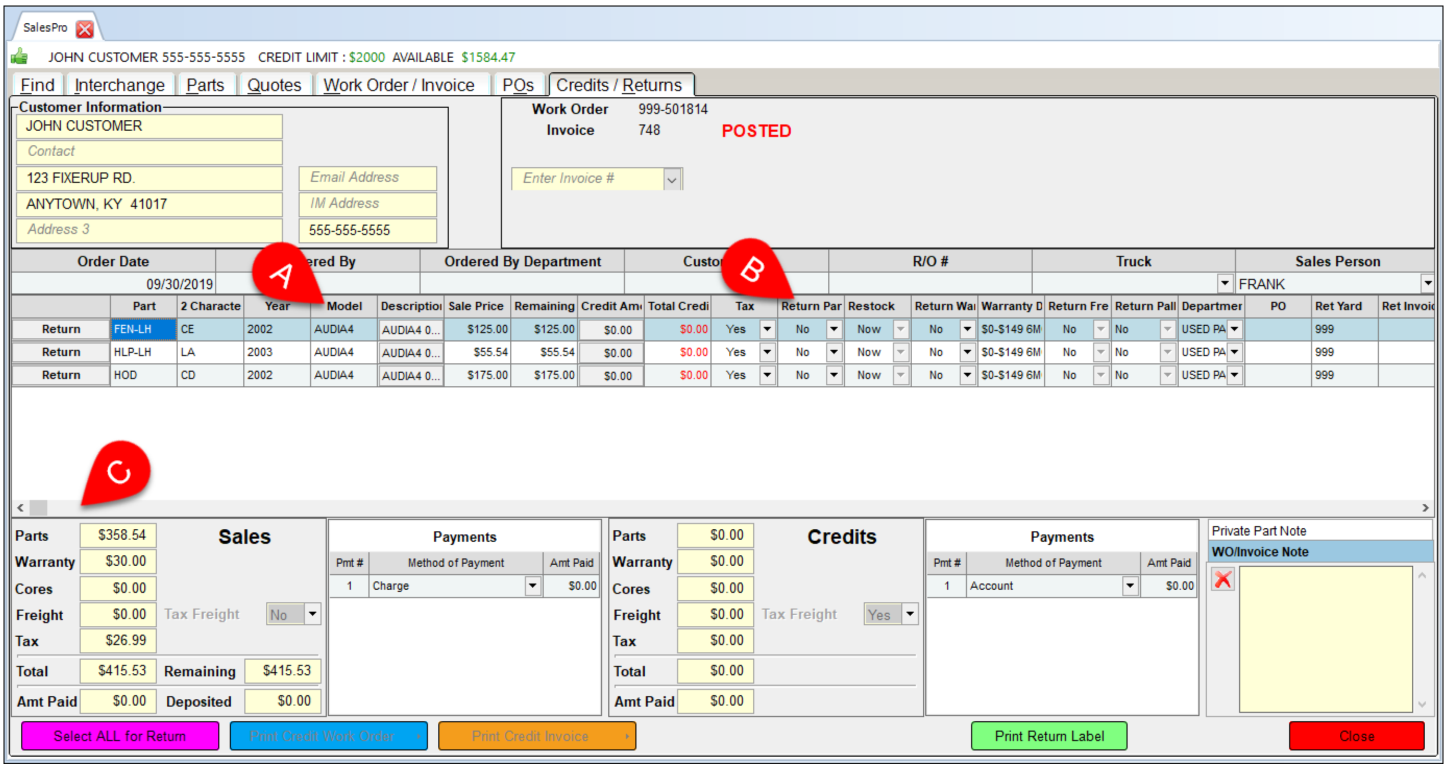
Customize Display

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

A. Resizing columns with your mouse, or clicking and dragging column headers to rearrange columns.

B. Right-clicking on any column header to select which columns to show or hide (see **Appendix A: Part Information Columns** for more information).

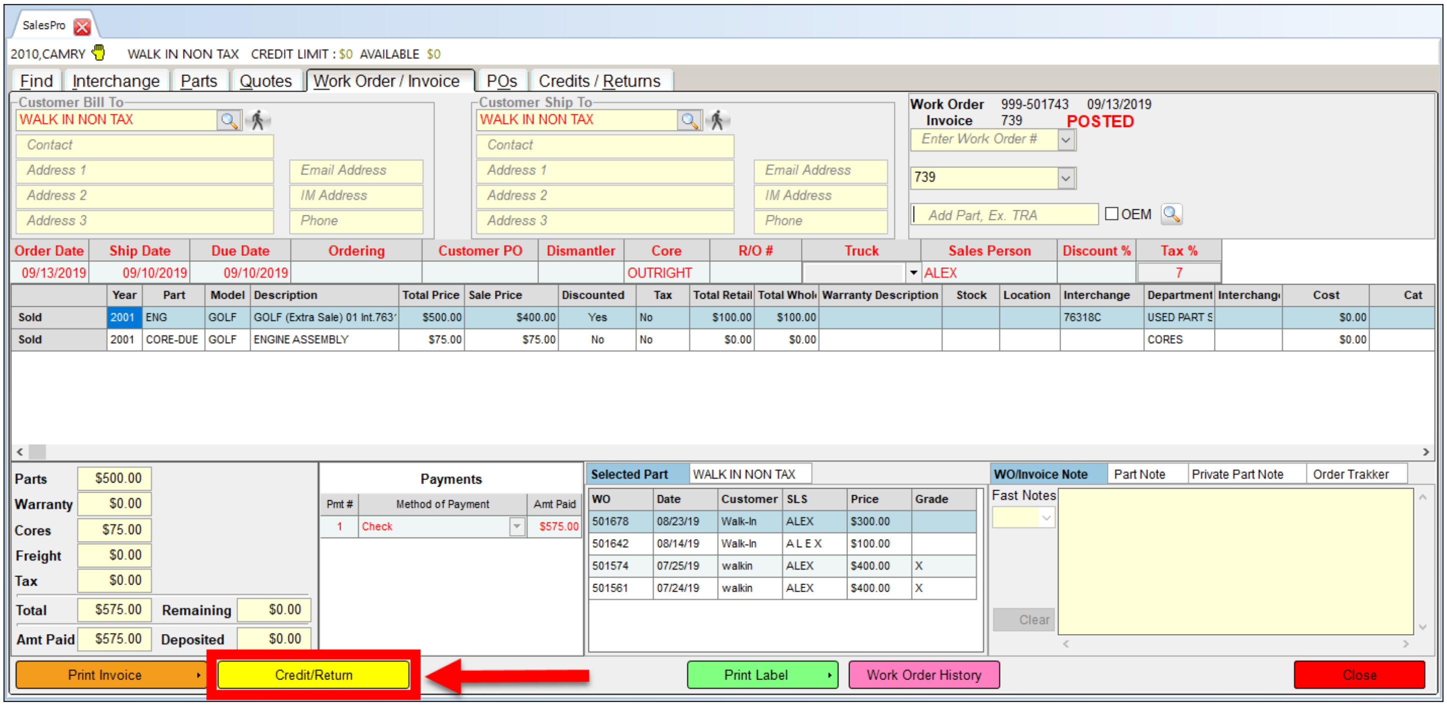
C. Using the horizontal scroll bar to see all the available information for each part (some users find it convenient to use wide-screen monitors with Checkmate Sales Pro, but it is not necessary).



Partially Credit a Part

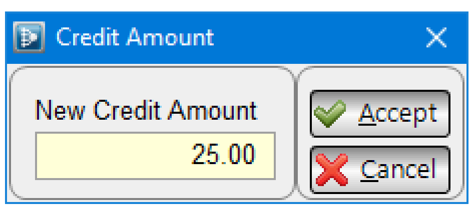
In Sales Pro, you can give a customer partial credit for a part. To use this feature, follow these steps:

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.

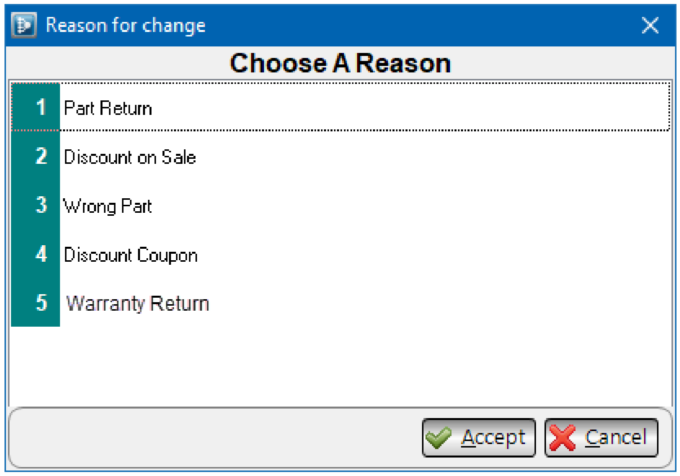


3. The **Credits/Returns** tab opens. Click the **Credit Amount** button to edit how much a customer should be credited for a part.

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



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.

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.

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.
- You recently upgraded to Car-Part Interchange Plus (CPI+) so a large number of parts now have interchange that did not previously.
- 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.
    - o 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.

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* 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** or Checkmate Classic: **S5** or Checkmate Junior: contact support).

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

‡ You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

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.
- **Ctl+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

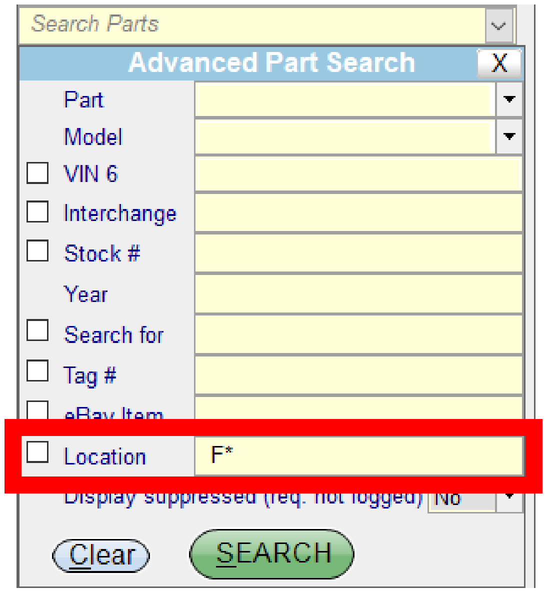
On the **Find** tab, locate the **Part and Vehicle Search** section. In the **Enter Part** field you can use the following search methods:

- 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.

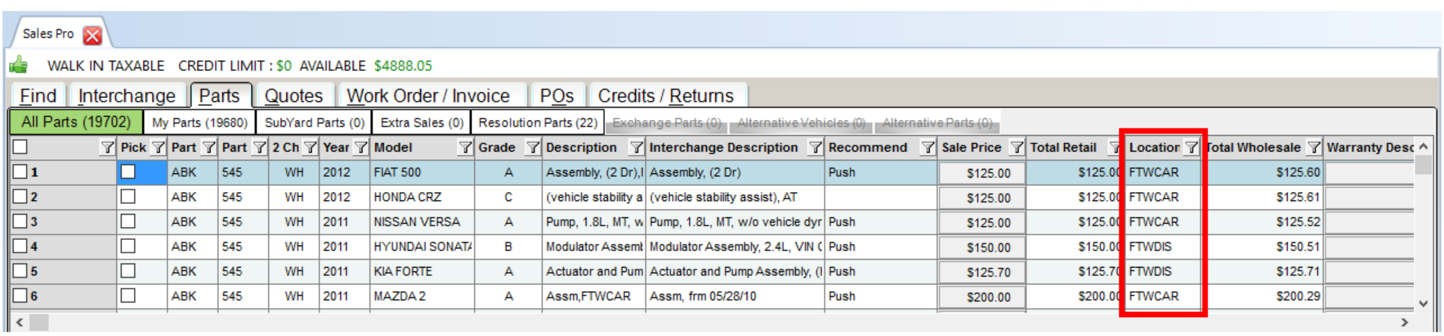
Find Parts Using Wildcard Method

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**.



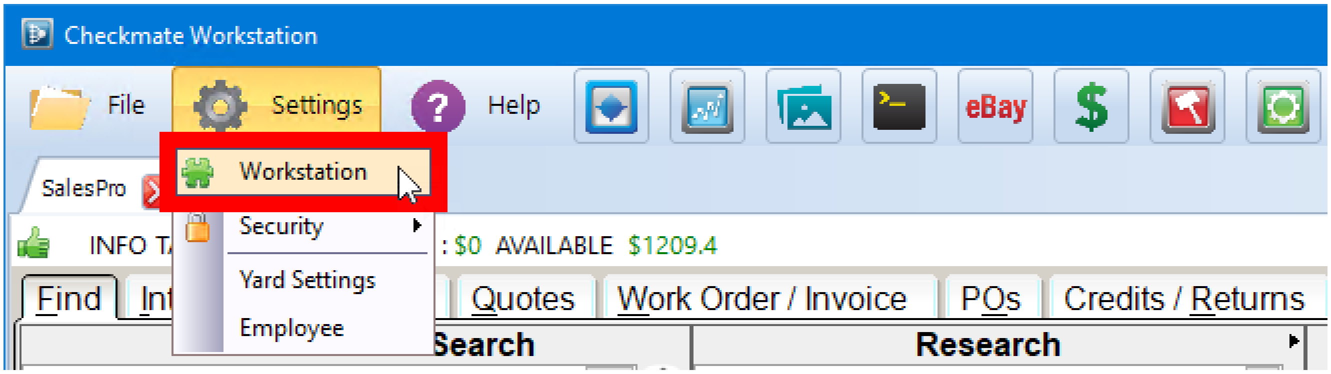
3. The **Parts** tab opens, displaying all parts with a **Location** that begins with the letter/number you specified in your search.



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.



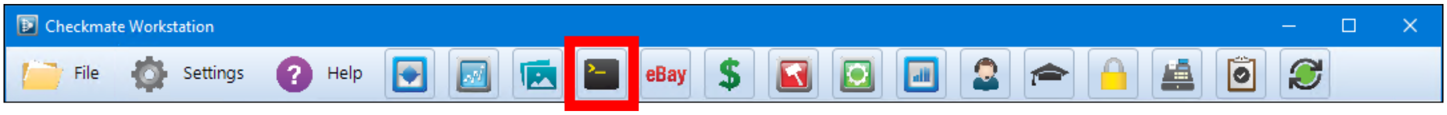
For more information about how to configure the settings available here, reference the Checkmate Workstation User Guide*.

* 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 Inventory Pro, 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 Pro** tabs.



Inventory

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

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

Accounting

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

	Checkmate Full menu option	**Checkmate Classic menu option**	**Checkmate Junior menu option**
• Enter or Change Document	**3,5**	**A3,2**	**3,5**
• Delete Paid Invoices	**3,6**	**A3,13**	**3,6**
• Calculate Finance Charges	**3,7**	**A3,8**	**3,7**
• Clear Period to Date	**3,8**	**A3,14**	**3,8**
• Clear Year to Date	**3,9**	**A3,15**	**3,9**
• Print Invoice Register	**3,12**	**A3,7**	**3,12**
• Print Customer List	**3,14**	**A3,6**	**3,14**
• Print Mailing Labels	**3,15**	**U15**	**3,15**
• Enter or Change a Batch	**3,17**	**A14**	**3,17**
• Print Batch Summary	**3,18**	**A16**	**3,18**
• Post Invoices	**3,19**	**A12**	**3,19**
• Print Invoice Proofing Report	**3,20**	**A15**	**3,20**
• Daily Sales Journal	**3,24**	**A3,20**	**3,24** or **1,10**
• Salesperson Invoice Summary	**3,27**	**A22**	**3,27**
• Taxing Authority Table	**3,28**	**A3,23**	**3,28**
• Tax Breakdown Report	**3,29**	**A3,24**	**3,29**
• Inactive Account Report	**3,30**	**A3,26**	**3,30**

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)
  - If the text is red, this means this part has a keyword in the description is affecting the part grade. (Refer to the Checkmate Inventory Pro User Guide[*] for more information to determine if any information needs to be corrected for this part.)
- **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.

[*] You can find this guide and other Checkmate Training materials at http://products.car-part.com/checkmate/training.html

- **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 in Checkmate but do not show online in Car-Part.com marketplaces.
  - **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 in Checkmate but do not show online in Car-Part.com marketplaces.
  - **S** – Sold. This part has been sold and the invoice has been posted. These parts display red in search results in Checkmate but do not show online in Car-Part.com marketplaces.
  - **W** – Work Order. This part is already on an existing work order. These parts display red in search results in Checkmate but do not display online in Car-Part.com marketplaces.
  - **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 in Checkmate but do not show online in Car-Part.com marketplaces.
  - **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.

[*] You have the option to include the ARA damage code when you print quotes, credits/returns, work orders, and invoices. Turn this setting on in Checkmate Retro using the **Change Invoicing** function (Checkmate Full: **6,10,1** or Checkmate Classic: **S3,1** or Checkmate Junior: contact support). Look for this prompt: **Would you like the ARA Damage Code field information printed and displayed on your Quotes, Return/Credit, Work Orders and Invoices?**

- **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)
    - **Used – OEM**
        - **U** – Used OEM
        - **T** – New take off
        - **0** – 0 miles OEM
        - **E** – OE Surplus
        - **S** – Surplus
        - **R** – Rebuilt
    - **Aftermarket**
        - **A** – Aftermarket
        - **P** – CAPA Aftermarket
        - **1** – CAPA Tier 1
        - **F** – NSF Aftermarket
        - **B** – Branded Aftermarket
        - **K** – Used Aftermarket

    - **Remanufactured**
        - **M** – Remanufactured
    - **OEM**
        - **D** – New OEM Discount
        - **N** – New OEM
    - **Core/Other**
        - **C** – Core
        - **Z** – Unknown
- **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
- **Total My List** – Includes My List price plus any applicable core charges, warranty charges, freight charges, and/or pallet charges
- **My List** – Your business's My List price for this part (used for parts with a Kind that is non-used, aftermarket, remanufactured, or new OEM). This amount should represent the MSRP of an OE surplus, discount OE, or any certified or non-certified aftermarket part, and it should have the shop's profit included.
- **Incomplete** – For assembly parts, indicates if the assembly is incomplete:
    - **N** – No, the assembly is *not* incomplete (i.e., it is complete).
    - **Y** – Yes, the assembly *is* incomplete (i.e., it is not complete).
    - **S** – The system (Checkmate) has recognized an inconsistency with the part and it needs to be reviewed. Review these parts in Inventory Pro using the INCOMPLETE View.

Appendix B: Pop-Up Windows

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

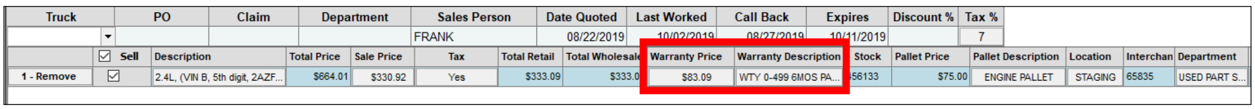
Applying a Warranty

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

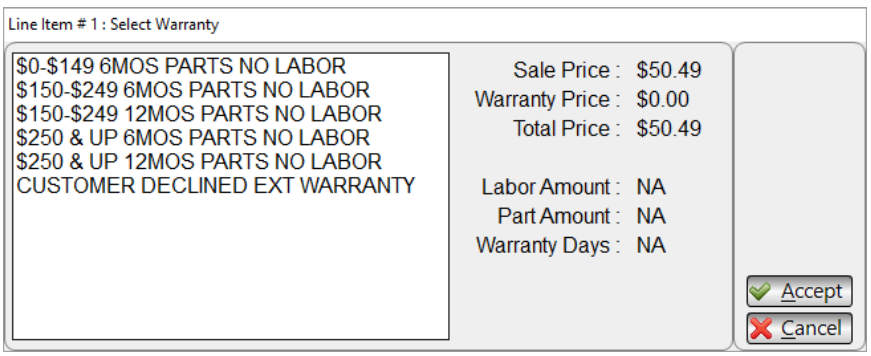
- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting to an invoice

To apply a warranty to a part:

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



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



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** or Checkmate Classic: **S3,12** or Checkmate Junior: contact support)

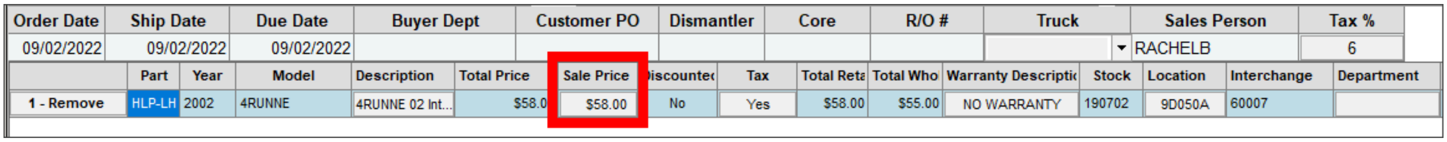
Editing the Sale Price

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

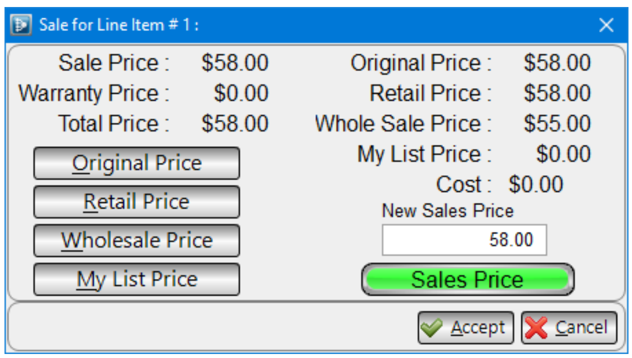
- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting the work order to an invoice.

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

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



2. The **Sale for Line Item** window opens. From here, you can:
   - Click the **Original Price**, **Retail Price**, **Wholesale Price**, or **My List 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 – 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 – 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 Sales Questions** function (Checkmate Full: **6,10,4** or Checkmate Classic: **S3,4** or Checkmate Junior: contact support).

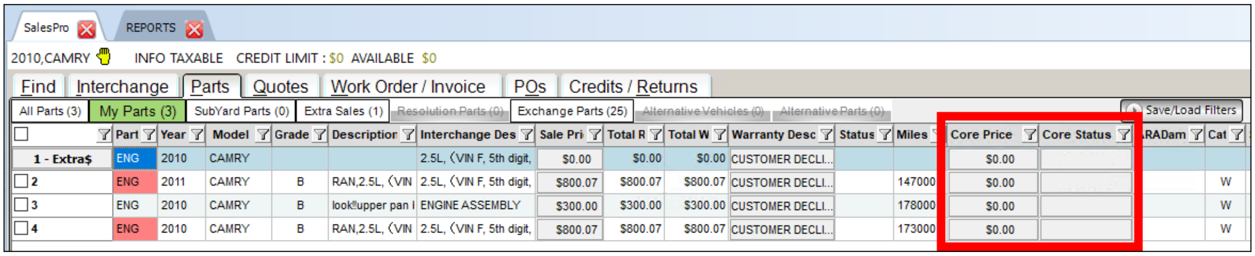
Adding/Editing a Core

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

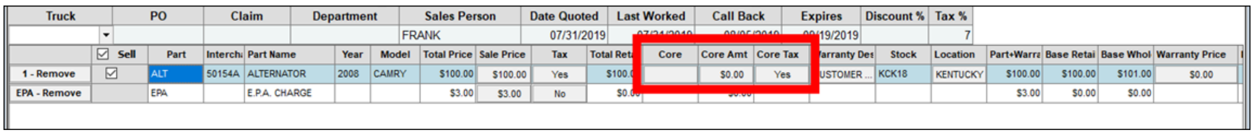
- **Parts** tab, before creating a sale
- **Quotes** tab, before promoting it to a work order

To add or edit a core:

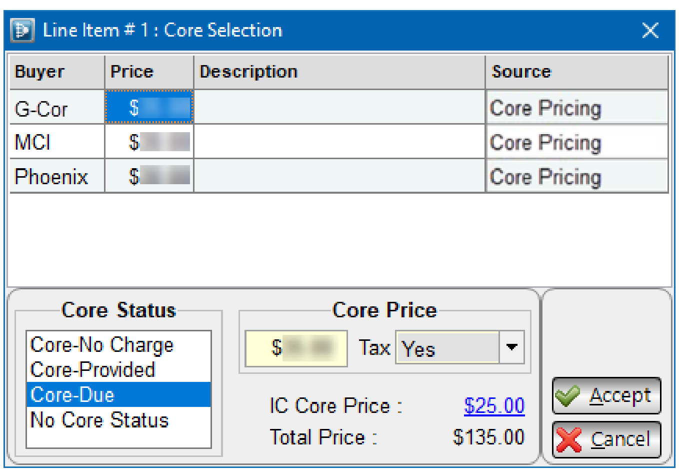
1. Open the **Core Selection** window.
    - On the **Parts** tab, click either the **Core Price** or **Core Status** fields for the appropriate part.



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

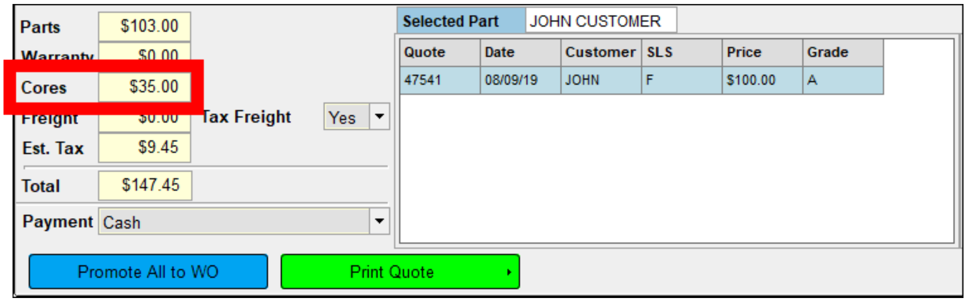


2. The **Core Selection** window displays. Select a **Core Status**.
    - If you're adding a **Core-Due**, several features help you set the **Core Price**.
        - o The Price Book's core price for this interchange number displays in the **IC Core Price:** field. Double-click it to set it as the **Core Price**.
        - o Use the **Tax** field to specify whether tax should be charged on the core.
        - o For Car-Part.com Demand Data 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**.



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

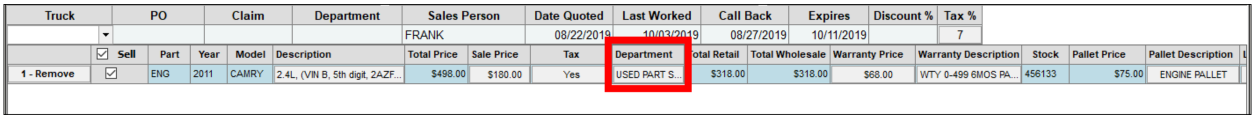
    - If you're adding a core to a part on the **Parts** tab, the core option will be temporarily set for all parts in your search results that have the same interchange number. This will reset when you start a new search.
    - On the **Quotes** tab, **Work Order/Invoice** tab, and **Credits/Returns** tab,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



Selecting the Part Department

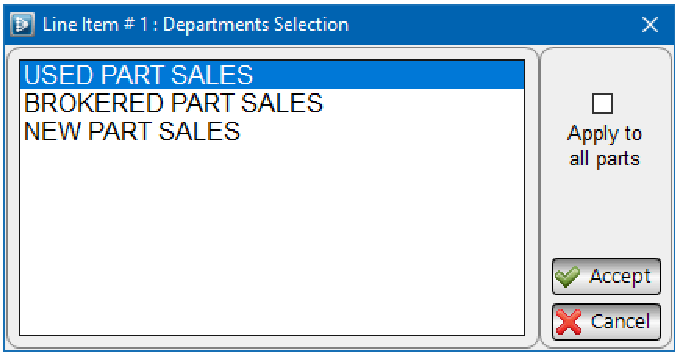
You can change a part's department on quotes and on work orders before they're promoted to an invoice. To do so:

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



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**.

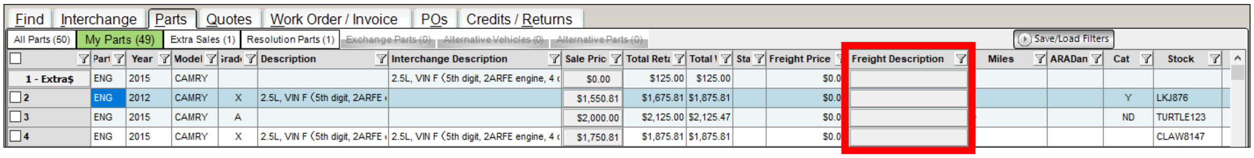
Adding/Editing Freight

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

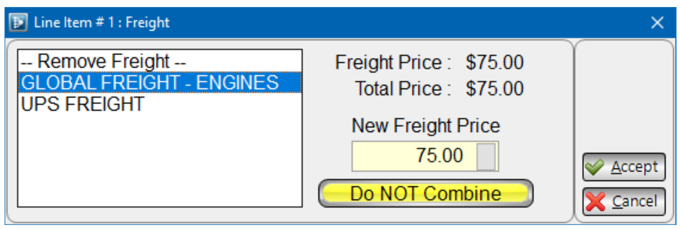
- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab, before promoting the work order to an invoice

To add/edit a freight charge for a part:

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



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

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

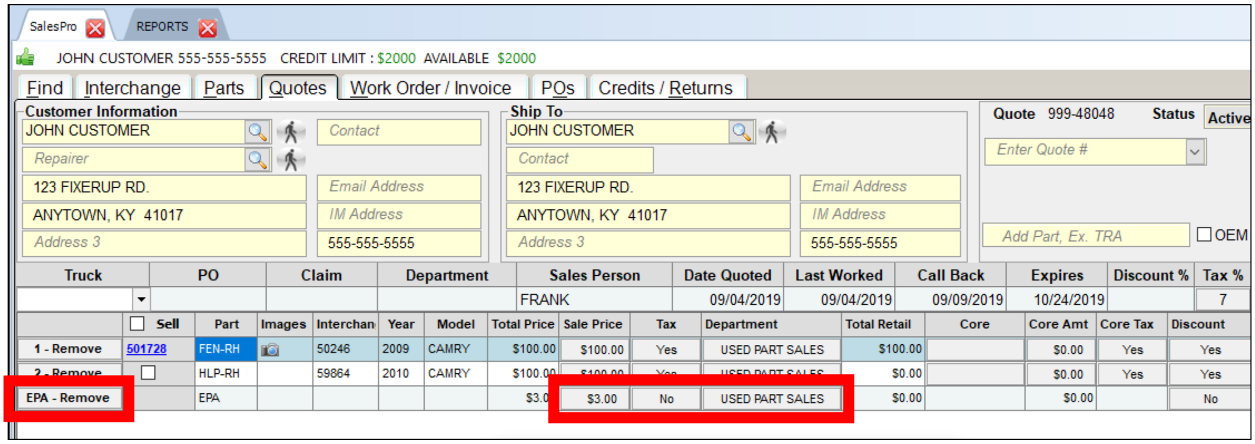
3. Click **Accept** to save these changes.
   - If you're adding a freight charge to a part on the **Parts** tab, the freight option will be temporarily set for all parts in your search results that have the same interchange number. This will reset when you start a new search.

[*] Freight options are configured in Checkmate Retro's **Setup Shipping Table** function: (Checkmate Full: **6,26,1** or Checkmate Classic: **S21,1** or Checkmate Junior: N/A)

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.



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

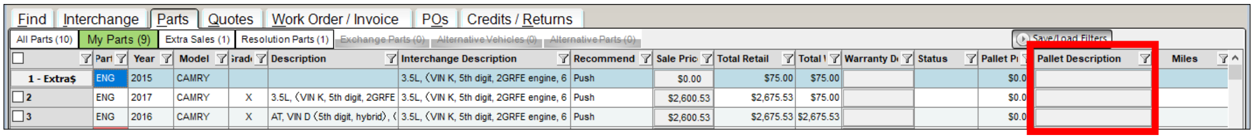
Adding a Pallet Charge

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

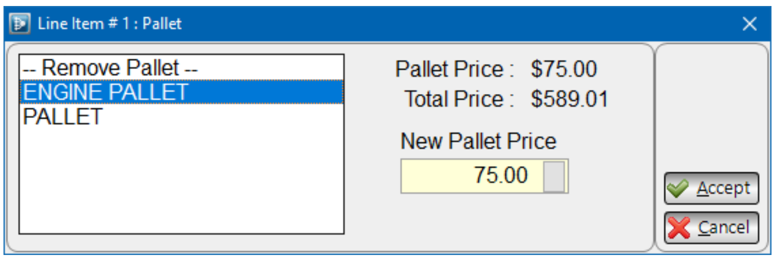
- On the **Parts** tab, before creating a sale
- On the **Quotes** tab and on the **Work Order/Invoice** tab, before promoting a work order to an invoice.

To add a pallet charge:

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



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



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** or Checkmate Classic: **S22** or Checkmate Junior: N/A)

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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