



Car-Part Exchange™

User Guide

Car-Part.com



Contents

Overview	3
Requirements	3
Using Car-Part Exchange with Checkmate Sales Pro.....	4
Searching for Parts	4
Quote Parts (Quotes Tab).....	7
Create Work Orders or Invoices (Work Order/Invoice Tab)	8
Create Purchase Orders (POs tab)	10
Using Car-Part Exchange with Checkmate Retro.....	12
Searching for Parts	12
Quotes	15
Work Orders	16
Creating a Work Order	16
Printing a Work Order	19
Purchase Orders.....	20
Create, Modify, or Delete Purchase Orders	20
Attach a Work Order to a Purchase Order	21
View Car-Part Exchange Statistics (4,2,1).....	23
Setup Yard Display Order (4,2,3)	24
Getting Help	25

Overview

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.

Using the same data feed process that Car-Part.com uses, Checkmate updates the Car-Part Exchange information every night with the inventories of these other recyclers and aftermarket parts vendors. This nightly upload provides you with the ability to locate parts quickly and sell them even if they are not currently in your inventory.

For help setting up Car-Part Exchange, contact your Checkmate support rep directly or call our main office at 859-344-1925. When you call and ask for assistance, mention that you need, "Help setting up Car-Part Exchange."

Requirements

To use Car-Part Exchange, you must be an Internet Checkmate user. Your Exchange Partners do not have to be Checkmate users, but they must upload their inventory to Car-Part.com.

Using Car-Part Exchange with Checkmate Sales Pro

Checkmate Sales Pro includes your Exchange Partners' parts in your search results every time you search (if available). From your search results, you can find and create sales for these Exchange Parts.

Searching for Parts

Follow these steps to find and sell parts from your Exchange Partners:

1. From the **Find** tab, enter parts to search, and then click **Find**.

The screenshot shows the 'Sales Pro' application window. At the top, it displays 'WALK IN TAXABLE' and 'CREDIT LIMIT : \$0 AVAILABLE \$6988.05'. The main interface is divided into several sections:

- Part and Vehicle Search:** Contains input fields for 'WALK IN TAXABLE', 'Quick Search # (e.g. 90, MUSTANG, ENG, TRA)', '2003', 'CAMRY', and 'Enter Part or OEM Number'. Below these are 'Remove' buttons for 'ENG', 'FENDER', and 'ALT'.
- Research:** Contains input fields for 'Enter Quote #', 'Enter Pick Slip #', 'Enter Work Order #', 'Enter Invoice #', and 'Enter Purchase Order #'. It also has 'Search Parts' and 'Search Customers' buttons.
- Buttons:** At the bottom of the search area are 'FIND' (green), 'RESET' (red), and 'LAST SEARCH' (cyan) buttons.
- JONATHANM - Activity:** A sidebar on the right showing various activity tables:
 - Quotes:**

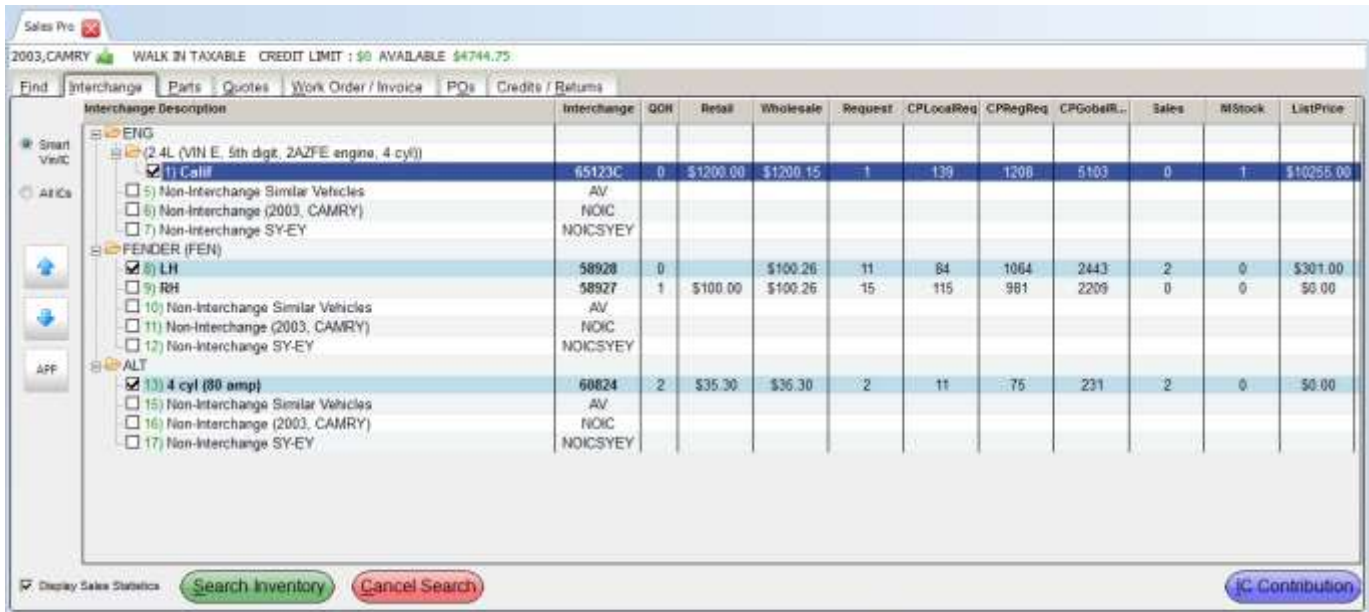
Quote	Date	Customer	Part	Model	Yr	Price	Yard
42038	04/04/16	WALK IN TAXABLE	TRA	CAMRY	03	\$200.70	
42039	04/04/16	WALK IN TAXABLE	TRA	CAMRY	03	\$500.00	
 - Work Orders:**

WO	Date	Part	Part #	Model	Yr	Price	Yard	Custom
114125	04/04/16	FEN	110	CAMRY	03	\$100.00	999	New Ric
114126	04/04/16	FEN	110	CAMRY	05	\$100.00	999	New Ric
114125	04/04/16	CORE		CAMRY	03	\$15.00	999	New Ric
114125	04/04/16	ALT	601	CAMRY	03	\$35.30	999	New Ric
 - Invoices:**

Invoice	Date	Customer	Part	Model	Yr	Price	Yard
114092	03/00/16	FOREIGN AUTO	V4L			(\$50.00)	999
114084	03/00/16	FOREIGN AUTO	V4L	SENTR	05	\$50.00	999
 - Purchase Orders:**

PO	Date	Customer	Part	Model	Yr	Price
8177	04/04/16	FOREIGN AUTO	FEN-R	CAMRY	03	\$100.00

- The **Interchange** tab opens. Check the box for the appropriate interchange number, then click **Search Inventory**.



- The **Parts** tab opens. The top portion of the screen lists your search results. If the part you are searching for is not in your inventory, you may now wish to create an Exchange Sale. Click the **Exchange\$** button to sell parts through a Car-Part Exchange partner.



- The **Exchange Sale** window opens. The **Stock** number and **Location** are filled in automatically. Enter the vendor's name in the **Vendor** field, or click the spy glass button to search.



- 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

The screenshot shows a software interface with a top navigation bar containing 'Car-Part Local-Region-Global', 'Requests', 'Sales', 'Avg Sales', 'MIS', 'Lost', 'QTY', and 'Unc'. Below this is a search bar with 'Select Line', 'Enter Part or OEM Number', and an 'OEM' checkbox. There are three buttons: 'Start New Quote', 'Print Pick Slip', and 'Start New Work Order'. The main area is divided into two sections: 'Selected Part' and 'Selected Account'. The 'Selected Part' section has a table with columns: IneWO, Date, Customer, SLS, Price, Grade. The 'Selected Account' section has a table with columns: Quote, Date, Customer, SL. Below these is a 'Description' tab, which is highlighted with a red box. It contains the following text: 'New Richmond Recyclers', '765 JFK Blvd.', 'New Richmond, OH, 45157', '555-555-5555', 'Jonathan@NewRichmondRecyclers.com', and 'IC - 60325'. At the bottom, it says 'Current User CHECKMATE USER (CM) Yard 4599'.

- 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.
- Select a **Department** (if applicable).
- 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
 - Create Sale Quote** to create the sale and start a quote
 - Create Sale WO** to create the sale and start a work order
- When you create the Exchange Sale and 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, work order, or invoice. Sales Pro automatically enters the vendor information on the quote, work order, or invoice you create for Exchange Sale parts.

Notes:

- When a work order or invoice is created for an Exchange Sale part, a purchase order is created automatically. A purchase order will also be created automatically when a quote containing an Exchange Sale part is promoted to a work order or invoice. (See the **Create Purchase Orders (POs Tab)** section of this guide for more information about purchase orders.)
- If you have the vendor set up in the **Automatic Purchase Order Assign List** in Checkmate Retro, you won't have to look up the vendor when creating an Exchange Sale. You can access this function with the **5,12,21,2** command.

Quote Parts (Quotes Tab)

To start a new quote, follow these steps:

1. Exchange\$ parts are automatically selected after creating an Exchange Sale. (If you would like to select more parts for this quote, you may check to select additional parts now.)
2. Click the **Start New Quote** button.
3. The **Quotes** tab opens.

The screenshot displays the 'Quotes' tab in the Sales Pro software. At the top, it shows the customer name 'NEW RICHMOND AUTO RECYCLERS 555-555-5555 JONATHAN' and a credit limit of \$10,000. The interface is divided into several sections: 'Customer Information' with fields for 'Order by' (Repairer) and 'New Richmond Auto Recyclers'; 'Ship To' with fields for 'New Richmond Auto Recyclers' and 'Jonathan'; and 'Quote' information with 'Quote # 999-41467' and 'Status Active'. Below these are fields for 'Truck', 'PO', 'Claim', 'Department', 'Sales Person', 'Date Quoted', 'Last Worked', 'Call Back', and 'Expires'. A table lists parts with columns for Part, Year, Model, Description, Total Price, Sale Price, Tax, Status, Warranty Description, Stock, Location, Interchange, Department, Total Retail, and Total Wholesale. A summary section shows 'Parts \$100.00', 'Freight \$0.00', 'Warranty \$0.00', 'Total \$100.00', and 'Payment Cash'. At the bottom, there are buttons for 'Promote to Work Order', 'Start Quote', 'Save', and 'Close'.

From here, you can:

- 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**, and **Department** fields, if applicable.
 - **Truck** identifies the truck that is delivering the part
 - **PO** identifies the buyer's PO number
 - **Claim** identifies the insurance claim number
 - **Department** identifies the department that is buying the part
- Edit the part's **Description**, **Sale Price**, **Warranty Description**, **Location**, **Department**, and whether or not **Tax** should be applied.
- Edit the **PO Account** for brokered Extra Sales and Exchange Sales.
- **Remove** a part from the quote.
- Select the **Payment** method.

- Attach a **Quote Note**, **Part Note**, and **Private Part Note** to this part. Quote Notes and Part Notes will be included on the quote. Private Part Notes can only be seen within Checkmate Sales Pro.
 - If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the quote.
- 4. Click **Save** to save the quote.
- 5. Click the **Print Quote** button to print. Click the arrow to **Email and Print** the quote or **Email Only**.

When you're ready to promote this quote to a work order, you can find this quote again using the **Research** section of the **Find** tab. Click **Promote to Work Order** at the bottom of the screen.

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

This tab displays a Work Order or Invoice. 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.

This tab can be reached in three ways:

- A quote can be promoted to a Work Order from the **Quotes** tab with the **Promote to Work Order** button.
- You can **Start New Work Order** or **Start New Invoice** from your Find and Sell results.
- You can look up a Work Order or Invoice from the **Find** tab's **Research** section.

The screenshot shows the 'Sales Pro' interface for a 'Work Order / Invoice' entry. The top navigation bar includes 'Find', 'Interchange', 'Parts', 'Quotes', 'Work Order / Invoice', 'POs (1)', and 'Credits / Returns'. The main form is divided into several sections:

- Customer Information:** Jonathan, New Richmond Auto Recyclers, 798 Lincoln Ave, New Richmond, OH 45157, Address 3, 555-555-5555.
- Ship To/Repairer:** New Richmond Auto Recyclers, 798 Lincoln Ave, New Richmond, OH 45157, Address 3, 555-555-5555.
- Work Order:** 999-111024, 03/17/2016. Includes fields for 'Enter Work Order #' and 'Enter Invoice #'. 'Anti Part. Ex: TRA' and 'OEM' checkboxes are present.
- Ordering Summary:** Order Date: 03/17/2016, Ship Date: 03/17/2016, Due Date: 03/17/2016. Includes fields for 'Ordering', 'Customer PO', 'Dismantler', 'Core', 'R/O #', 'Truck', 'Sales Person' (JONATHANM), and 'Tax %' (6).
- Parts Table:**

Part	Year	Model	Description	Total Price	Sale Price	Discount	Tax	Total Retz	Total Who	Warranty Descrip	Stock	Loss#on	Interchange	Department	Interchange Descri
1 - Remove	FEB-RH	2005	CAMRY	\$125.00	\$125.00		fts	\$0.00	\$0.00		15070E	FTWCAR11	58927	USED PART SA	
EPA - Remove	EPA			\$10.00	\$10.00		fts	\$0.00	\$0.00				58927	BROKESER PA	
- Summary:** Parts \$135.00, Tax \$0.00, Freight \$0.00, Warranty \$0.00, Amt Paid -\$135.00, Total \$135.00, Remaining \$0.00. Payment: Cash.
- Selected Part:** New Richmond Auto Recyclers.
- WO/Invoice Note:** Part Note, Private Part Note, Order Transfer. Includes a 'Fast Notes' dropdown with 'Purchase Order 7977' and a 'Clear' button.
- Buttons:** 'Save and Print Workorder' (blue), 'Print/Promote to Invoice' (orange), 'Print Label' (green), 'Save' (cyan), 'Close' (red).

If the order is in Work Order status, you can take the following actions:

- 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/Repairer** fields.
- View the work order number and status.
- Use the **Add Part** field to add another part to the work order.
- Add information to the **Ordering, Customer PO, Dismantler, Core, R/O#, Truck, and Tax %** fields, if applicable.
 - **Ordering** identifies the department that is buying the part
 - **Customer PO** identifies the buyer's PO number
 - **Dismantler** identifies the name of the employee who will dismantle the vehicle
 - **Core** identifies the core status
 - **R/O#** identifies the insurance claim number
 - **Truck** identifies the truck delivering the part
 - **Tax** identifies the amount of tax that is being applied
- Change the **Sales Person** name
- Change the part's **Description, Sale Price, Warranty Description, Location, Department,** and whether or not **Tax** can be applied.
- Right-click on a part and select **Print Pick Slip** to print a pick slip.
- **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.
- Attach a **WO/Invoice Note, Part Note, or Private Part Note** to this part. **WO/Invoice Notes, Part Notes,** and **Order Trakker** notes will be included on the work order/invoice. **Private Part Notes** can only be seen within Checkmate Sales Pro.
 - If you enter notes in the **Manual Entry** column of Order Trakker, those notes appear under the **Order Trakker** tab. (You can only edit these notes in Order Trakker.)
 - If **Fast Notes** are enabled, use the **Fast Notes** drop-down to select pre-determined notes that appear on the work order/invoice.

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

Create Purchase Orders (POs tab)

When you create a work order or invoice for an Exchange Sale from the **Parts** tab, a purchase order is created automatically. The **POs** tab name will display the number of purchase orders waiting for your attention.

- If a PO is created automatically, visit this tab and click **Edit** to edit information.
- If a PO has not been created automatically, you can create one with the **New PO** button.

The screenshot shows the 'Sales Pro' application window with the 'POs (1)' tab selected. The interface includes a search bar for 'Enter Purchase Order #', a 'New PO' button, and a 'Close' button. The main area displays vendor information for 'New Richmond Auto Recyclers' and a table with one part line: 'FEN CAMRY 2005 Extra Sale - RH \$100. \$125.00 Active 150705 FTWCAR Brokered 111030-1'. A 'PO Item Note' dialog box is open, containing the text: 'Sale price: 125', 'Work Order 111030', and 'Condition:'. The total amount is \$100.00.

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
- Change the **Status** to **Active**, **Received**, **Returned**, or **Voided**.
- Change 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.

Using Car-Part Exchange with Checkmate Retro

Checkmate Retro includes your Exchange Partners' parts in your search results every time you search (if available). From your search results, you can find and create sales for these Exchange Parts.

Searching for Parts

1. From the **Find and Sell** screen, enter your search criteria.

```
8-Sep-11  JASON H                               * Find and Sell *
                                         Orion C1338      Yard # 999  9:47 AM
Go to      :
VIN        :
Customer   : Walk-in
Part       : ENGINE ASSEMBLY
Year       : 2006
Model      : FORD FOCUS
Stock #    :
Tag #      :
Interchange # :
Search     :
Start search : 
```

Help Clear Pick Mail RTS Orion
Alt-H Alt-C Alt-P Alt-M Alt-T Alt-O

2. From the **Interchange** menu, enter the line number for the correct part.

```
                                         * Find and Sell *
Part: ENG          Model: FOCUS          Year: 2006      Qty
1 2006-07 2.0L (VIN N, 8th digit, DOHC)..... 91788
2 2005-07 2.3L (VIN Z, 8th digit, DOHC)..... 9142

Enter choice, (?#) notes, IC#, or 0 for none : 
```

- The **Find and Sell Results** screen shows that the part you are searching for is not in your inventory. Enter **F** to search for this part in your Exchange Partners' inventory.

Note: If none of your Exchange Partners have the part, the **Find** option will not appear.

```

F2 KEY 70.30
796344 Part: ENG Model: FOCUS Year: 2006 Int #: 9178B
FOREIGN AUTO SALVAGE List: 3768
# Model Yr Grade Cat Description whsl Retail St

COST LABOR CODE NAME WHOLESALE RETAIL
50.00 0.00 A1 $0-$499 6MOS PARTS NO LABOR
100.00 0.00 A2 $0-$499 12MOS PARTS NO LABOR
75.00 0.00 B1 $500-$999 6MOS PARTS NO LABOR
150.00 0.00 B2 $500-$999 12MOS PARTS NO LABOR
10.00% 0.00 C1 $1000 & UP 6MOS PARTS NO LABOR
0.00 0.00 C2 CUSTOMER DECLINED EXT WARRANTY

Help Orion Find Change Toggle Apps
? O F C < > AS
Enter: (#)Sell/Hold, Part Code, (Q)uit : F
  
```

- The **Car-Part Exchange Finds** screen opens, showing all of your Exchange Partners that have the part. This screen also displays the yard name, telephone number, a price range for the part, and the part grade. Enter the line number to view additional details about the part.

```

* Car-Part Exchange Finds *
Part: ENG Model : FOCUS Year: 06 IC# 9178B
# Business Name Phone C# QTY Price Range Grade Range
1 Brock Auto Parts 1-800-235-3346 1 0.00 - 0.00 K
2 Neal Auto Parts 1-800-548-2138 2 250.00 - 250.00 A-B
3 Paul and Sons Auto 1-859-744-3328 1 505.00 - 505.00 B
4 Allgeier Auto Parts 800-745-3378 / 1 0.00 - 0.00 B
5 All Foreign and Domestic 1-800-541-6344 2 465.00 - 490.00 A
6 J and J Auto Wrecking 1-800-425-1555 2 500.00 - 600.00 B
7 Brims Imports Auto 1-800-221-3874 3 0.00 - 0.00 A
8 Bairds Auto Parts, Inc. - 1-800-828-1075 8 650.00 - 650.00 A-K
9 QRP incorporated DBA Duck 513-321-9278 1 0.00 - 0.00 A
10 Pike 27 Auto Parts 1-800-354-0506 1 750.00 - 750.00 K
11 Dicks Auto Salvage 1-800-252-4712 3 377.00 - 377.00
12 Jeffries Auto Salvage 1-800-962-2393 6 350.00 - 600.00 A-B
13 Blue Grass Auto Parts 1-800-432-0730 1 650.00 - 650.00 A
14 Key Auto Parts 1-800-626-3302 3 0.00 - 0.00 A-K

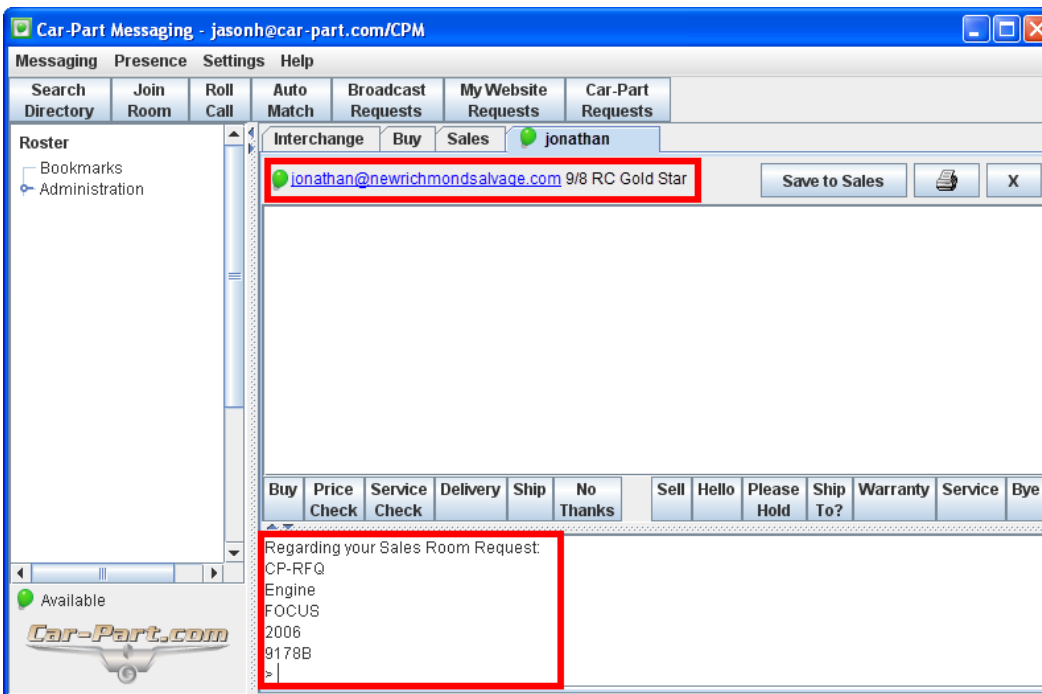
Enter: (#) to view detail, (O)rion, (P)revious screen, or (Q)uit <Q>: 5
  
```

- The **Car-Part Exchange Yard Detail** screen opens, showing you a more detailed description of the part.

If you are a Car-Part Messaging (iCPM) customer, the link at the top of the page allows you to contact the Exchange Partner immediately using iCPM. Click on the link to send a message to this Exchange Partner and inquire about the part or arrange a purchase.



- A private message screen opens with information about the part you are searching for automatically inserted. Type your message and press **Enter**.



- After you have discussed this part with the seller and have confirmed that you can buy the part, return to Checkmate to start a quote or work order.

8. At the prompt, enter the line number of the part you are selling or enter **Q#** to give a quote.

```
* Car-Part Exchange Yard Detail *
Part: ENG          Model : FOCUS          Year: 06          IC# 91788
IM://matt.all4rn.oh@mw8.car-part-im.com_ENG_FOCUS_2006_91788
All Foreign and Dome 1-800-541-6344      Qty:2 Price range: 465.00 - 490.00

# MODEL  YR DESCRIPTION          STOCK#  DAMAGE    GRADE  PRICE
1 FOCUS  07                      000207          A      465.00
2 FOCUS  07 29552 miles          000197          A      490.00

Enter: Next (Y)ard, (M)essage send, (P)revious
      (#) to sell, (Q#) Quote item , (Q)uit <Y>: 1
```

Quotes

Once you have located the part for your customer, you can quote the item and save the quote for future reference.

1. At the prompt, enter the letter **Q** and the line number of the item you are quoting.

```
* Car-Part Exchange Yard Detail *
Part: ENG          Model : FOCUS          Year: 06          IC# 91788
IM://matt.all4rn.oh@mw8.car-part-im.com_ENG_FOCUS_2006_91788
All Foreign and Dome 1-800-541-6344      Qty:2 Price range: 465.00 - 490.00

# MODEL  YR DESCRIPTION          STOCK#  DAMAGE    GRADE  PRICE
1 FOCUS  07                      000207          A      465.00
2 FOCUS  07 29552 miles          000197          A      490.00

Enter: Next (Y)ard, (M)essage send, (P)revious
      (#) to sell, (Q#) Quote item , (Q)uit <Y>: Q1
```

2. On the **Quotes** screen, enter the letter **N** for a new quote or the letter **L** to list previous quotes. In this example, we are creating a new quote for the customer.

```
* Quotes *

Enter a quote #, (N)ew quote, (L)ist quotes, or (Q)uit <N>: N
```

3. Complete the information about your customer.

- Enter **P** to print the quote or **F** to file the quote you have given.

```

F2 KEY 70.38          BOB'S AUTO PARTS          Original Lookup: FOCUS,06
-----
Customer: BOB'S AUTO PARTS      Status : ACTIVE      Quote : 31601
Name : BOB                      Send Card: N         S1sperson : JASONH
Phone :                          Expires : 12/7/11    Created : 9/8/11
Repairer:                       Call Back: 9/13/11  Last work : 9/8/11
-----
Model Yr Part  Description      Stock      Rqest IC  Quote IC  Price  St
-----
1-FOCUS 07 ENG  Yard 1041-1041      000207    9178B    9178B    465.00  X
2-
3-
4-
5-
-----
[ Total $ 465.00 ]
-----
Email: mailto:
Notes :
-----
(E)dit, (D)elete, (S,S# or S#,#) sell, (P)rint, (C)ust copy
(=#) work, Part, (B#) Backorder, (H#) Hold, (F)ile or (Q)uit F

```

Work Orders

Checkmate creates a work order every time a transaction is completed and automatically assigns a work order number. When the work order is finalized at the end of the transaction, an invoice is created and is also automatically assigned a number.

You can use the **Reprint or Change Work Orders** function (1,8) to modify and convert a work order into an invoice.

Creating a Work Order

- From the **Car-Part Exchange Yard Detail** screen, enter the letter **S** to start a new work order.

```

* Car-Part Exchange Yard Detail *
-----
Part: ENG          Model: FOCUS          Year: 07
IC Desc:
Description:
-----
status: Available      Interchange: 9178B      Price: 465.00
Stock #: 00020723      Location: W04A01
Grade: A              Miles:                  List Price: 465.00
-----
IM://matt.all4rn.oh@mws.car-part-im.com\_ENG\_FOCUS\_2007\_9178B\_
-----
Enter: (S)tart new work order (A)dd to previous work order (K) stock search
      (O)rion, (C)hoose another, or apply sale to work order (=)
      or (?) to list (Q)uit : S

```


2. Press **Enter** to move to the next screen and finalize your work order. You will enter the customer name, the department, and the purchase price of the part. At the prompt you can enter:
- **F** to finalize the transaction
 - Another part code
 - **E** to Edit
 - **Q** to add more parts

In this example, we will enter **F** to finalize the transaction.

```

S BOB'S AUTO PARTS          * workorder 75222 *
S BOB'S AUTO PARTS
O
L
D
H
I
P
-----
Requested: Part: ENG      Model: FOCUS      Year: 07      Stock # : 000207
Warranty :c2      Price:465.00      Tax:Yes
Description: FOCUS 07 IC# 9178B - Yard #1041-1041

warranty: Parts- $0.00 Labor- $0.00 Price: 465.00 Total: 465.00

(F)inalize work order, Part code, (E)dit, or (Q) add more parts : F

```

3. The **Finalize** screen opens and displays all necessary elements of the sale. From this screen, you can add missing information such as the phone number, the name of the person ordering the part, and the purchase order number.

4. You will be prompted to print a purchase order. You can enter:
- **F** to finalize the work order
 - Another part code
 - **Q** to continue without printing a purchase order
 - The purchase order printer number to print the purchase order
 - **E** to email the purchase order
 - **S** to display the purchase order on your screen

S BOB'S AUTO PARTS				S BOB'S AUTO PARTS				
O				H				
L				I				
D				P				
TERMS Cash		PHONE		ORDERED BY		DEPT	PO#	ORDER DATE 09/08/11
W/O # 75224				R/O #	TRUCK	SALESMAN JH	SHIP DATE 09/08/11	
N								
O								
T								
E								
S								
				SUB 465.00				
				TAX 27.90				
				FREIGHT 0.00				
				TOTAL 492.90				
				PAYMENT 492.90				
Enter 'Q' to continue without printing the purchase order.								
Enter PO Printer #, (E)mail, (S)creen, or (Q)uit : TNT 69.24.31.130:3116 1344								

5. In the **Payment** field, enter the type of payment presented for this part using the following choices:
- **0** for COD
 - **T** for total payment transaction
 - **A** for a change
 - **D** for a deposit
6. Select the method of payment from the following options:
- **1** for Cash
 - **2** for Check
 - **3** for Credit Card

Printing a Work Order

1. At the prompt, select the appropriate choice for how you wish to handle the work order:
 - **I** will convert the work order into an invoice and print to your invoice printer.
 - **W** will not generate an invoice but will only print a work order for the transaction. You can use the work order to pull a part, check on the condition of a part, etc. without the fear of losing or damaging the invoice.
 - **E** will allow you to edit the work order.
 - **R** will allow you to create a truck routing report.
 - **?** will list all the options available.
 - **C** will display the actual work order for further modification.

In this example, we are ready to print the work order so we have selected **W** to print.

S BOB'S AUTO PARTS				S BOB'S AUTO PARTS					
O				H					
L				I					
D				P					
TERMS Cash		PHONE		ORDERED BY		DEPT	PO#	ORDER DATE 09/08/11	
W/O # 75224				R/O #	TRUCK	SALESMAN JH	SHIP DATE 09/08/11		
N						SUB		465.00	
O						TAX		27.90	
TPurchase Order 5799						FREIGHT		0.00	
E						TOTAL		492.90	
S						PAYMENT		492.90	
Enter: (I)nvoice print, (W)ork order print, (E)dit,						METHOD		Cash	
T(R)ruck, (C)hange screen, (?)Options, or (Q)uit : W									

2. Press **Enter** to use your default work order printer or enter a printer number.

Purchase Orders

Purchase orders are created to track your part purchases. A purchase order is stored and can be retrieved by the purchase order number. Purchase orders stay in your system until they are deleted or their expiration date is reached.

The **Display or Change Purchase Orders** menu (1,10) is used to:

- Create, modify, or delete purchase orders.
- Create purchase order reports.
- Review the details of the purchase orders on your system.

Create, Modify, or Delete Purchase Orders

Use the **Create, Modify, or Delete Purchase Orders** function (1,10,1) to create a new purchase order when you are buying parts from another yard. You can also modify or delete an existing purchase order. To use this function, select it from the **Display or Change Purchase Orders** menu.

```
Created: 11-Apr-11          * Purchase Order 5252 *          Salesperson: JASONH
A  JASON'S AUTO PARTS          Contact :
C  123 MAIN STREET             Phone  :
C                               Account : R0023
T  CINCINNATI, OH 45202        PO Status: Open

Email : mailto:

-----
Item #      : 1      Total items: 1      Status : Active
Work Order  :                               Part   : ENG
Model       : FORD PICKUP F150 SERIES      Year   : 1998
Stock #     :
Description : FTF150 (Extra Sale) 98 Int.9064 8-330 (5.4L SOHC),
Price      : 400.00      Location :

N
O
T
E
S

-----
(F)ile, (E)dit, (P)rint, (A)dd, (D)elete, or (Q)uit : 
```

1. Go to the **Create, Modify, or Delete Purchase Orders** function (1,10,1).
2. Enter the purchase order number to modify an existing purchase order or enter **N** to create a new purchase order.
3. Enter or change the information on the **Purchase Order** screen.
4. At the prompt, enter **F** to file the purchase order. If you created the purchase order with a work order number, you can also view, finalize, and/or edit the work order.

Attach a Work Order to a Purchase Order

Checkmate allows you to easily attach a work order to a purchase order. To attach a work order to a purchase order:

1. Create or search for a purchase order.
2. At the **Purchase Order** screen, enter **L** at the **Work Order** field.

```

Created: 3-Aug-11          * Purchase Order 5680 *          salesperson: JASONH
A  JASON'S AUTO PARTS          Contact :
C  123 MAIN STREET             Phone   : 5131231234
C                               Account  : R0032
T  CINCINNATI, OH 45202        PO Status: Open

Email  : mailto:JASON@JASONSautoparts.com
-----
Item #      : 1 Total items: 1          Status : Active
Work Order  : L                       Part   :
Model      :                          Year   :
Stock #    :
Description :
Price      :                          Location:
N
O
T
E
S
-----
Enter the work order or (L) for list
  
```

3. Enter your search criteria and press **Esc** to build a list of your work orders.
4. Select the work order to attach to the purchase order and press **Enter**.

Date	work order	Sales Person	Name	Amt Due	Terms	Part	1 of 1 Amount
07/05/11	72997	JARED	DANNY	0.00	Multi	LAB	0.0
07/12/11	73260	GINA	walk-in	132.50	Multi	FDR-L	125.00
07/19/11	73565	KEVIN	CHRISTENSEN AUTO	45.00	chrge	FRL-L	45.00
08/02/11	73990	TB	walk-in	212.00	Multi	ENG	200.00
08/03/11	73991	RANDYE	BOB MOONEY	0.00	cash	ENG	0.00

YEAR	MODEL	PART	DESCRIPTION	STOCK #	IC #	PRICE	ST
2003	CCLASS	LAB	CCLASS (Extra Sale) 03	110626		0.00	X


Use arrow keys to select, (P)rint, or (Q)uit:

5. The work order will be attached to the purchase order.

Created: 3-Aug-11	* Purchase Order 5683 *	salesp	ASONH
A JASON'S AUTO PARTS	Contact :		
C 123 MAIN STREET	Phone :	5131231234	
C	Account :		
T CINCINNATI, OH 45202	PO Status:	Open	
Email : mailto:JASON@JASONSautoparts.com			
<hr/>			
Item # : 1	Total items: 1	Status :	Active
Work Order : 73260		Part :	FDR
Model : HONDA CIVIC (SEE ALSO DELSOL		&Year :	98
Stock # : 110520			
Description : CIVIC 2DR 98 Int.58696A LH,Cpe (2 Dr), elec,DARK			
Price : 125.00		Location :	FTWDIS
N Sale price: 125.00			
O work Order 73260			
T Condition: Occ			
E			
S			
<hr/>			
(F)ile, (E)dit, (P)rint, (W)orkorder, (A)dd, (D)elete, or (Q)uit : F			

View Car-Part Exchange Statistics (4,2,1)

To confirm when Car-Part Exchange data was last processed for your yard and your Exchange Partners, open Checkmate Retro and go to the **View Car-Part Exchange Statistics** function (4,2,1). The **Date** column indicates when data was last processed.

 **Note:** Car-Part Exchange data is processed nightly. If the dates listed on this screen are more than 2 days old, contact your support rep for assistance.

* * Car-Part Exchange Statistics * *								
Sent To Car-Part Exchange	Complete	Date	Transactions		Adds	Change	Deletes	
			Parts	Vins				
1682 Higgins Auto Parts -	Yes	9/6/16	1	0	1	0	0	
From Car-Part Exchange:								
1682 Higgins Auto Parts -	Yes	9/6/16	29191	0	29191	0	0	
2417 Tri County Auto Dism	Yes	9/7/16	113601	0	113601	0	0	
'Return' to continue								

Setup Yard Display Order (4,2,3)

Checkmate allows you to determine the order in which your Exchange Partners appear in search results. To use this feature, follow these steps:

1. In Checkmate Retro, go to the **Setup Yard display order (4,2,3)**.
2. The **Setup Display Order** screen opens. Use the arrow buttons on your keyboard to highlight an Exchange Partner in the list, then enter **D** to move them down in the list. The Exchange Partner listed first will be the first to appear in search results.

* Setup Display Order *	
YARD #	YARD NAME
2417	Tri County Auto Dismantlers
1682	Higgins Auto Parts - PRP West

Enter: Move (D)own, (Q)uit, or
use arrow keys to navigate: █

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!

Published by
Car-Part.com
1980 Highland Pike
Ft. Wright, KY 41017

Copyright © 2016 by Car-Part.com

All rights reserved. This software and related documentation are proprietary to Car-Part.com. No part of the contents of this document may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

Bidmate, Partmate, Car-Part Messaging, iCPM, Live Service, Live Chat, Coremate, Core Pricing, Checkmate, Fast Parts, FastNnet, Car-Part Exchange, Trading Partners, Compass, Orion, SmartVin, Smart Interchange, Order Trakker, CrashLink, Car-Part Pro, Labelmate, Sales Pro, Checkmate Workstation, and Tagmate are trademarks of Car-Part.com.

Car-Part Interchange information is © 2005-2016. The Hollander Interchange is included with or is the basis for the Car-Part Interchange. The Hollander Interchange is © 2016 Claims Services Group, Inc.

Information from Motor's databases (including OEM part descriptions, OEM pricing, and part illustrations) are copyright ©2011-2016 by MOTOR Information Systems, a division of Hearst Business Media, Inc. All rights reserved.

Some of the information available through this product contains material that is reproduced and distributed under a license from Ford Motor Company. No further reproduction or distribution of the Ford Motor Company material is allowed without the express written permission of Ford Motor Company.

All other product and company names mentioned herein are the property of their respective owners.

This edition obsoletes all previous editions.