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Page 2
Overview

The Inventory tool is Checkmate’s “command central” for inventory management. With this tool you can easily:

- Add and edit vehicles and parts
- Search for inventory to review and edit using detailed criteria
- Research pricing with one-key access to CrashLink and Trading Partners
- Perform edits on multiple parts at one time
- Add part tags to the tag queue or print them right away
- Send parts to Photomate to have photos taken
- Assign interchange to Resolution Parts

Open the Inventory Tool

In Checkmate Workstation, in the toolbar at the top of the window, click the clipboard button to open the Inventory tool.

The Inventory tab opens.

⚠️ Note: You can configure the Inventory tool 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.
There are several ways to get started:

- **Search for inventory to review or edit**
  Use the fields at the top of the screen to perform a search for parts or vehicles you want to review or edit. For more info about this, refer to the **Searching for Inventory – Find Tab** section of this guide.

- **Assign interchange to Resolution Parts**
  Click **Resolution Parts** to display parts that need to have an interchange number assigned. For more info about this, refer to the **Resolution Parts** section of this guide.

- **Add a vehicle**
  Click the add vehicle button 🚗 to add a vehicle to your inventory. For more info about this, refer to the **Adding a Vehicle** section of this guide.

- **Add a part**
  Click the add part button 🛠 to add a loose part to your inventory. For more info about this, refer to the **Adding a Part** section of this guide.
**Saving Your Changes**
While you're working in the Inventory tool, any changes you make to parts or vehicles are not permanent until you click the save button.

Throughout the Inventory tool, if you've made changes to a part or vehicle and you try to navigate away from the screen you're working in without saving, a message will appear prompting you to save your work.

Choose from these options:
- **Save** – Save all changes and proceed.
- **Don’t Save** – Proceed without saving.
- **Cancel** – Stay on the current screen with the unsaved changes.
Searching for Inventory – Find Tab

The Find tab is the first tab in the Inventory tool. Use this tab to search for parts and vehicles that you want to review or edit. Here’s how it works:

1. Type in your search criteria in the fields at the top of the tab. You can search using just one field, or you can use a combination of fields:

- **Stock** – Type a stock number
  - Type the beginning of a stock number followed by an asterisk (*) to perform a “wildcard” search. This searches for parts with stock numbers that start with what you typed.
    
    **Example:** Type `190*` to search for inventory with stock numbers that start with `190`.

- **Part** – Select a part type. You can type in this field to narrow down the results.

  **Tip:** Type a part code followed by a dash and an interchange number to quickly search for a specific interchange option (e.g., `ENG-77041`).

- **Year** – Type a single year or a range of years.

- **Model** – Select a model. You can type in this field to narrow down the results.

- **IC** – Type an interchange number. If using this field to search, you must also select a **Part** type.

- **VIN 6** – Type the last 6 digits of a VIN

- **Search for** – Use this field to search stock numbers, interchange options, interchange descriptions, part descriptions, conditions, and locations for what you type in this field.

- **Tag** – Type a part tag number

- **eBay** – Type an eBay ItemID

- **Location** – Type a location to search for parts in a single location, or:
  - Type the beginning of a location followed by an asterisk (*) to perform a “wildcard” search. This searches for parts in all locations that start with what you typed regardless of how long the location name is.

  **Example:** The locations in the second aisle of your warehouse all begin with `WO2`. Type `WO2*` to search for all parts in the second aisle of your warehouse.

  - Type part of a location, using question marks (?) to represent characters in the location name. This searches for parts in locations that match the non-question mark characters and are the same length as what you typed.

    **Example:** Type `9B???A` to search for parts in all locations that have a 6-character name that begins with ‘9B’ and end in ‘A.’

- **Days in Stock**
  - Type a range (e.g. `200-300`)
  - Type `>` and a number to search for parts with a number of days in stock that is more than the number you type.
  - Type `<` and a number to search for parts with a number of days in stock that is less than the number you type.

- **Recommend** – Select a recommendation to search for parts with a particular Checkmate recommendation.
2. Once you've put in your search criteria, click the magnifying glass button or press **Ctrl+F** on your keyboard to search.

While the search is in progress, a cancel button displays in place of the magnifying glass button. Click the cancel button to stop an in-progress search.
3. Your search results display. From here you can:
   a. Sort and filter parts. For more info, refer to the Filter Search Results section of this guide.
   b. Perform bulk part edits. For more info, refer to the Bulk Editing section of this guide.
   c. Launch a Trading Partners or CrashLink search. For more info, refer to the CrashLink and Trading Partner Searches section of this guide.
   d. Double-click on a part to edit it (or click on it, and click the edit button.) For more info, refer to the Editing a Part section of this guide.
   e. Print a snapshot of your screen. For more info about this, refer to the Printing the Screen section of this guide.
   f. Print part tags right away, or add parts to the tag queue (keyboard shortcut: Ctrl+T). For more info about this, refer to the Printing Part Tags/Adding Parts to the Tag Queue section of this guide.
   g. View additional information about the part and vehicle. For more info, refer to the Part and Vehicle Information section of this guide.
   h. Send parts to Photomate for photos. For more info, refer to the Sending Parts to Photomate for Photos section of this guide.
   i. View statistics for the highlighted part in the bottom of the screen.
   j. See core value of the selected part. (Advanced Bidmate subscribers can click this field to see potential core buyers.)
   k. See images for the highlighted part.
   l. Delete parts from inventory. For more info, refer to the Deleting Inventory section of this guide.
   m. Click to clear your search results and start a new search.
**Customize Display**

On the Find tab, you can customize your display by:

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

B. Right-clicking any column header to select which columns to show or hide (see the Part Information Columns section of this guide for more information).

C. Using the horizontal scrolling bar to see all available information for each part (users may find it convenient to use wide-screen monitors, but it is not necessary).

D. Clicking the blue arrow to show/hide the image tray.
**Filter Search Results**

Filters allow you to view only certain parts in your search results (e.g., you can filter by the **Grade** column to only see parts of a certain grade).

On the **Find** tab, click the filter button ![filter icon] at the top of any column to limit your results. When you select a filter, your search results display *only* parts that match that filter.

Here's how it works:

1. On any column, click the filter button ![filter icon].
2. A menu opens showing the filter options available for that column. 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, the **Description** column includes a filter called “Contains.” If you select this filter option, the following window will appear. Type “Right” and click **Accept** to filter your search results to *only* show parts with a description that contains “Right.”

<table>
<thead>
<tr>
<th>Stock</th>
<th>Part</th>
<th>Year</th>
<th>Model</th>
<th>Grade</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VIN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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• Exact filters. The filter menu may display options that allow you to select exact information to filter by.
  o For example, in the Grade column, you can simply click the A option 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 a 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 a filter by clicking 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 A, and a year of 2009-2012).
Save/Load Custom Filter Settings
If you use the same filter(s) regularly, you can save your favorite custom filter settings for future use with the Save/Load Filters button.

To save custom filter settings, follow these steps:

1. On the Find tab, 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 + 2000-2005”).

4. Click the save disk button. A message appears confirming that the filter has been saved.

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

There is no limit to the number of custom filters you can create. Custom filters created in the Inventory tool are visible and available to all users of the Inventory tool at your business.

Using Saved Custom Filter Settings
Once a custom filter has been saved, you can use it on any search results. To do so, follow these steps:

1. On the Find tab, perform a search.
2. Click the Save/Load Filters button.
3. Use the drop-down box to select from the available saved custom filters. When you select a custom filter, the search results are immediately filtered according to the selected filter.

To keep the Custom Filters drop-down open until the next search, click to check the No auto retract box.
4. To remove a custom filter from your search results, click the eraser button to remove the last applied filter.

![Custom Filters](image)

**Viewing/Deleting a Custom Filter**

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

1. On the **Find** tab, click the **Save/Load Filters** button.

2. Click the gear button to access the custom filter settings.

3. The **Custom Filters** window opens listing each available custom filter.
   - To view the details of a filter, click on a filter name to select it. The **Filter Conditions** column lists the details of the filter.
   - To delete a saved filter, click the checkbox to select it, then click **Delete**.

![Custom Filters](image)

4. Click **Close** to return to the **Find** tab.
**Part Colors**

In search results on the **Find** tab, certain parts are colored to give you information about the part, with just a glance. These colors display 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 each color:

<table>
<thead>
<tr>
<th>Color</th>
<th>Status</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>W</td>
<td>Work Order</td>
<td>High</td>
</tr>
<tr>
<td>I</td>
<td>Invoice</td>
<td>Low</td>
</tr>
<tr>
<td>S</td>
<td>Sold</td>
<td>Low</td>
</tr>
<tr>
<td>D</td>
<td>Deleted</td>
<td>Low</td>
</tr>
<tr>
<td>C</td>
<td>Committed on eBay</td>
<td>Low</td>
</tr>
<tr>
<td>H</td>
<td>Hold</td>
<td>Low</td>
</tr>
<tr>
<td>Q</td>
<td>Quote</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>Resolutions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-exact Interchange</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Listed on eBay</td>
<td>Low</td>
</tr>
<tr>
<td>X</td>
<td>Expired eBay</td>
<td>Low</td>
</tr>
<tr>
<td>A</td>
<td>Assembly and component</td>
<td>Low</td>
</tr>
</tbody>
</table>

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** displays in red because a part on a work order is a higher priority than a part on a quote.
**CrashLink and Trading Partner Searches**

In your search results on the **Find** tab, click to highlight a part and then press:

- Your **Price** or **Buy F-key** to do a Trading Partners search.
- Your designated CrashLink **F-key** to initiate a CrashLink search. In Checkmate, the default F-key is **F6**.

⚠ **Note:** You can also perform these searches while editing or adding a part on the **Part** tab.
** Viewing Images **

In search results on the **Find** tab, the icon shown for a part in the **Images** columns indicates whether the part has images:

- ![part image icon] – There are part images associated with this part.
- ![AUT image icon] – There are AUT images associated with this part.
- ![no image icon] – There aren’t any images associated with this part.

⚠️ **Note:** If the **Images** column is not displayed, right-click on any column header, select **Images** from the list that appears, and then click **Done**.

At the bottom of the **Find** tab, the image tray displays the images associated with the highlighted part. Click the blue arrow on the left to show/hide the image tray.

If a part does not have images but is associated with a vehicle that *does* have images, the AUT images display for the part. In this case, the label **AUT Images** display at the top of the image tray (as shown above). As soon as part images are added to the part, AUT images no longer display for that part.
To view/edit images for a part, double-click an image in the image tray, or single-click the icon in the **Images** column to open the image viewer window. On the image viewer window, use the buttons at the top of the window to do the following:

- Add an image to the part. (You can also drag and drop images from your hard drive into this window to associate them with the part or vehicle.)
- Remove this image from the part (cannot remove AUT images from a part).
- Configure this image as the primary image for the part. The primary image is the thumbnail image for the part's online listings.
- Mark this image as private. Private images are visible in Checkmate but do not upload to online listings.
- Zoom in.
- Zoom out.
- Fit the image to the window.
- Show the image’s actual size.
- Email the image.
- Print the image.
- Open the image.

Close this window to return to the **Find** tab.
Individual Part Editing on the Find Tab

In search results on the **Find** tab, you can edit certain fields for individual parts without leaving your search results. The column headers are colored green in your search results list, to indicate that this field can be edited without leaving the search results:

- Description
- Category
- Location
- Stock number
- Base Retail price
- Base Wholesale price
- Condition
- Private status
- Review status

You can edit multiple parts at the same time (refer to the **Bulk Editing** section of this guide for more info) or you can edit just one part:

- Drop-down fields: click the down arrow ▼ and select the desired option.

- Free-form typing fields: click inside the field and type your edit.

**Tip:** Press the down arrow on your keyboard to move your cursor down to the next part in your search results.

When you’re finished editing, click the save button. (Changes are *not* saved until you click save.)

After you save your changes, edited parts display green in the checkbox column to indicate your changes were successfully saved.
Bulk Editing Multiple Parts

In search results on the Find tab, you can edit multiple parts simultaneously. You can bulk edit the following:

- Description
- Category
- Location
- Stock number
- Base Retail price
- Base Wholesale price
- Condition
- Private status
- Review status

To do so, follow these steps:

1. In your search results on the Find tab, check the boxes in the checkbox column to select the parts you want to edit.

2. At the top of your search results, click the Edit button at the top of the information column you want to edit. Items that are available for bulk editing have green labels.

3. In the bulk editing window that displays, designate the information you want to change and then Accept your changes to return to the Find tab. For more information about bulk editing windows, refer to the sections below.
4. Click the save button. (Changes are *not* saved until you click save.)

After you save your changes, edited parts display green in the checkbox column to indicate your changes were successfully saved.
**Bulk Edit Description, Location, or Stock Number**

To edit the Description, Location, or Stock number for multiple parts at once, follow these steps:

1. In the checkbox column, check the boxes to select the parts you want to edit.

2. At the top of your search results, click the button in the column you want to edit: **Edit Description**, **Edit Location**, or **Edit Stock**.

3. The **Bulk Editing** window opens. On the left, click to select a **Change Action**:
   - **Search N Replace**: searches for what’s in the **Search this text** field and replaces it with what’s in the **Replace where found with this text** field.
   - **Append**: adds what’s in the **Add text to end** field to the end of the field.
   - **Prepend**: inserts what’s in the **Insert text at start** field at the beginning of the field.
   - **Replace All**: replaces the entire field with what’s in the **Replace text with** field.

4. Use the text box(es) to the right to specify the text you would like to use to perform the **Change Action** you selected.

5. Click **Accept** to return to the search results.

6. Click the save button. (Changes are **not** saved until you click save.)
**Bulk Edit Category or Condition**

To edit the **Category** or **Condition** for multiple parts at once, follow these steps:

1. In the checkbox column, check the boxes to select the parts you want to edit.

2. At the top of your search results, click the button in the column you want to edit: **Edit Cat** or **Edit Condition**.

3. The **Bulk Editing** window opens. Click the down arrow to select the desired **Category** or **Condition**.

4. Click **Accept** to return to the search results.

5. Click the save button. (Changes are not saved until you click save.)
Bulk Edit Base Retail or Base Wholesale Price

Editing the base retail or base wholesale prices of parts only affects the price of the part; this does not change other prices (e.g., core or freight prices). To edit the base retail or wholesale price for multiple parts at once, follow these steps:

1. In the checkbox column, check the boxes to select the parts you want to edit.
2. At the top of your search results, click the button in the column you want to edit: Base Retail or Base Wholesale.
3. The Bulk Editing window opens. From here, you can:
   - Type a new price in the Replace with amount field to set the price for all selected parts.
   - Adjust the price by a flat Amount or by a Percentage, by clicking the appropriate radio button, and then specifying the change in the Percentage of change/Amount of change field. Typing a minus sign (-) before the number lowers the price (e.g., -10 would lower the price by 10 percent or dollars).
   - Bulk edit the cents value, by clicking the Cents option and then typing the desired amount in the Update Cents Indicator field. (This is for those who use the cents value to indicate when the part was last priced.)

   **Note:** If you have the cent field indicator setting turned on, the cent amount will populate with the current date code.

4. Click Accept to return to the search results.

---

1 This is configured in Checkmate Retro using the Change Inventory Questions function (Checkmate Full: 6,10,3.
Checkmate Classic: S3,3.)
5. Click the save button. (Changes are not saved until you click save.)

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>ASH-L</td>
<td>AXLE SHAFT-L</td>
<td>2007</td>
<td>MAZCX7</td>
</tr>
<tr>
<td>7</td>
<td>ASH-R</td>
<td>AXLE SHAFT-R</td>
<td>2007</td>
<td>MAZCX7</td>
</tr>
<tr>
<td>9</td>
<td>AUT</td>
<td>AUTOMOBILE</td>
<td>2007</td>
<td>MAZCX7</td>
</tr>
<tr>
<td>10</td>
<td>BAG</td>
<td>AR BAG</td>
<td>2007</td>
<td>MAZCX7</td>
</tr>
<tr>
<td>11</td>
<td>BAG</td>
<td>AR BAG</td>
<td>2007</td>
<td>MAZCX7</td>
</tr>
</tbody>
</table>

**Bulk Edit Review/Private Status**

To edit the Review or Private status of multiple parts at once, follow these steps.

1. In the checkbox column check the boxes to select the parts you want to edit.
2. At the top of your search results, click the button in either the Private or Review column until it's toggled to the desired status.
   - Yes – The status of the selected parts is set as Private or Review.
   - No – The status of the selected parts is not set as Private or Review.
3. Click the save button. (Changes are not saved until you click save.)
**Bulk Editing AUT (Automobile) Records**

Some restrictions apply to bulk editing AUT records.

Multiple part types – If you are bulk editing AUT records along with other part types (as shown below), you can only bulk edit the **Location** and **Description** of the AUT record.

<table>
<thead>
<tr>
<th>Select</th>
<th>Part</th>
<th>Part Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>6</td>
<td>ASH-L</td>
</tr>
<tr>
<td>✔️</td>
<td>7</td>
<td>ASH-R</td>
</tr>
<tr>
<td>✔️</td>
<td>8</td>
<td>AUT</td>
</tr>
<tr>
<td>✔️</td>
<td>9</td>
<td>BAG</td>
</tr>
<tr>
<td>✔️</td>
<td>10</td>
<td>BAG</td>
</tr>
</tbody>
</table>

AUT records only – If you are bulk editing only AUT records (as shown below: no other part types are selected for editing), you can bulk edit the **Location**, **Description** and **Category** of the AUT records.

<table>
<thead>
<tr>
<th>Select</th>
<th>Part</th>
<th>Part Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>1</td>
<td>AUT</td>
</tr>
<tr>
<td>✔️</td>
<td>2</td>
<td>AUT</td>
</tr>
<tr>
<td>✔️</td>
<td>3</td>
<td>AUT</td>
</tr>
<tr>
<td>✔️</td>
<td>4</td>
<td>AUT</td>
</tr>
<tr>
<td>✔️</td>
<td>5</td>
<td>AUT</td>
</tr>
</tbody>
</table>

To edit other information for an AUT, double-click the AUT part line to open the **Vehicle** tab for editing.
Resolution Parts

Parts “in resolution” are parts that need interchange numbers assigned to them. To help you identify these parts, they are colored yellow in search results in both Sales Pro and the Inventory tool. These parts need to be manually reviewed and have the interchange selected.

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

There are several things that 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 are put in resolution.
- Models that were split during an interchange release may need to be re-inventoried. Review the interchange release documentation to see if any model splits occurred. SmartVin² automatically moves parts to the correct model based on the VIN, but if the interchange number assigned to a part is invalid, the part will go into resolution.
  - If a vehicle does not have a VIN associated with it or if the VIN is incorrect, use the Print Release Notes function³ 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 How to Review Resolution Parts guide located at: http://products.car-part.com/checkmate/training_salespro.html?p=4
- In rare cases, a part code may be split into separate codes after a new interchange release.

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² SmartVin is a Car-Part.com-exclusive technology that realizes the interchange number for many parts directly from the VIN, so that inventoring or searching for parts is simplified.
To review **Resolution Parts**, follow these steps:

1. On the **Find** tab, click **Resolution Parts**.
   - You can look for specific Resolution Parts using the **Stock, Part, Year, Model, Location**, or **Days in Stock** fields. For example: To search for engines that are in resolution, set the **Part** field to **ENG** and then click **Resolution Parts**.

2. Your resolution parts display. In the **Interchange** column, click the question mark button to assign interchange to a part.

   - **Note:** You can also double-click a part to edit it and assign interchange on the **Part – Edit** tab. For more info about this, refer to the **Part Tab** section of this guide.

3. The **IC Selection** window opens. To choose an interchange option:
   - Click the checkbox for the interchange option you want to assign to this part (you will be returned to the **Find** tab.)
   - or
   - In the **Line to Select** field, type the line number for the option you want to select and press **ENTER** to enter (you will be returned to the **Find** tab).
On this window, you can also:

- Limit interchange choices by SmartVin\(^4\) by selecting **SmartVin/IC** (only applicable if this part is associated with a vehicle with a VIN). To see all interchange choices, select **All ICs**.
- View interchange application information for any option by clicking to highlight an option and then clicking the **APP** button.
- Place the **Interchange Description** of the selected option at the end of the current part **Description**, by checking **Copy IC Description to User Description** before selecting the interchange.

4. When you’ve selected an interchange option and have returned to the **Find** tab, the selected option displays in the **Interchange** column. Click the save button to make this change permanent.

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

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\(^4\) 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.
Adding a Vehicle

To add a vehicle to your inventory, follow these steps:

1. On the Find tab, click the add vehicle button.

2. The Vehicle – Add tab opens. Use this tab to put in the information about the vehicle you’re adding. Fields with green text are required fields. For more info about this tab, refer to the Vehicle Tab section of this guide.
3. When you’ve finished putting in the information for the vehicle, click the save button ![save icon] to add the vehicle to your inventory.
Editing a Vehicle

To edit an existing vehicle in your inventory, follow these steps:

1. On the **Find** tab, search for the vehicle you want to edit. (For more info about searches, refer to the **Searching for Inventory – Find Tab** section of this guide.)

2. In your search results, locate the AUT (automobile record) for the vehicle you want to edit and double-click it. You can also click on it, and then click the edit button.

3. The AUT displays on the **Vehicle – Edit** tab. Use this tab to edit the vehicle information. For more info about this tab, refer to the **Vehicle Tab** section of this guide.
4. When you are finished editing, click the save button.
Vehicle Tab

On the Vehicle tab, you can add vehicles to your inventory and edit vehicles that are already in your inventory. As you’re working on this tab you can use the buttons on the left side of the screen to:

- Print a snapshot of your screen. For more info about this, refer to the Printing the Screen section of this guide.
- View additional vehicle information including Vehicle History, VIN Decode, and Part History for the AUT. For more info about these options, refer to the Part and Vehicle Information section of this guide.

Use the following fields to add or edit information on the Vehicle tab:

- **Yard** – If you have more than one yard, select the yard number.
- **Stock No.** – Type the stock number. If you’re adding a vehicle and you have automatic stock number sequencing turned on, you can click the Next button to populate this field with the next sequential stock number.\(^5\)
- **VIN** – Type the VIN. Click the magnifying glass button \(\mathcal{V}\) to view information about this vehicle based on the VIN. For more info, refer to the VIN Decode section of this guide.
- **Model** and **Year** – If a VIN is available, these fields populate from the VIN. Otherwise, type the year and model.
- **Location** – Type a location. If you’re adding a vehicle, this will be the default location for each part you inventory on this vehicle.
- **Mileage** – Type the mileage for the vehicle.

\(^5\) You can set up automatic stock number sequencing in Checkmate Retro using the Change Inventory Questions function (Checkmate Full: 6,10,3. Classic: S3,3.)
Vehicle Category – Select a category for this vehicle:

- Not Cleared – If this option is selected and then you select a different option, the Cleared Date is populated with the current date (if it was previously blank).
- Offsite – If you select this option, the Purchased Date will populate with the current date (if it was previously blank).
- Not Inventoried – If you select this option, the Possession Date will populate with the current date (if it was previously blank).
- No Sales
- Not Dismantled – If you select this option, the Inventoried Date will populate with the current date (if it was previously blank).
- In Dismantling
- Dismantled – If you select this option, the Dismantled Date will populate with the current date (if it was previously blank).
- Crushed – If you select this option, the Crush Date populates with the current date.
- Sold – If you select this option, the Sold Date will populate with the current date (if it was previously blank).

Sales Type – Select the type of sale for this vehicle: Parts, Rebuilder, or Scrap.

Disposition – Select the disposition. When you set this field, the Disposition Date populates automatically.

If you’re adding a vehicle, set whether you want to inventory a VUC for this vehicle:

- Inventory VUC – A VUC will automatically be added to your inventory when you click save to add the vehicle to your inventory.
- Do NOT Inventory VUC – A VUC will not be automatically added for this vehicle.

Entered by – Checkmate user who added this vehicle.

Date Entered – Date the vehicle was added.

Last Checked – Date the vehicle was last edited.

Breakeven Days – Days it took to break even on the vehicle.
• Use the next section to add or edit purchasing and inventory information:
  o The Purchased Date, Possession Date, Cleared Date, Inventoried Date, Dismantled Date, Crush Date, and Sold Date populate automatically when the related Vehicle Category is set (i.e. when the Vehicle Category is set to Sold, the Sold Date populates with the current date).
  These date fields, except Crush Date, can also be set manually. Click the calendar button and select the desired date.

• In the next section of fields, type in the costs and fees for the vehicle.
  o The Total Cost is the total of all costs and fees for a vehicle. When you click save, the total amount populates in this field.
  o The Bid Amount field is a display-only field that Checkmate calculates by subtracting all costs and fees below this field from the Total Cost amount.

⚠️ Note: When a vehicle is exported from Partmate to Checkmate, or pulled from Checkmate into Partmate, only the Total Cost amount transfers. The individual fee/cost amounts do not transfer. If you want to track the individual fees/costs that are listed in this section, it is recommended that you enter them in Checkmate when the vehicle will no longer be transferred between Checkmate and Partmate.

• On the right side of the tab, type in sales information.
  o Projected Sales – If projected sales amounts were entered in Partmate and the vehicle is exported to Checkmate, those amounts display here. You can edit these amounts.
  o Part Sales – Populates with the dollar amount of part sales from this vehicle.
  o Credits/Returns – Populates with the credits and returns from this vehicle.
  o Total Sales – Displays the total of the Part Sales, CAT Amount, Core Amount, Scrap Amount, Credits/Returns, and Adjustments fields. (If you edit these amounts, the Total Sales field will update when you save your changes).

Use the tabs at the bottom of the screen to view, add, or edit title info, vehicle notes, images, and vehicle history. Refer to the following sections for more info.

When you’ve finished adding or editing the vehicle, click the save button. 📋
Vehicle – General Tab
On the General tab, you can add or edit the vehicle’s damage, exterior and interior colors, Description, and other general information.

- **Damage Primary** – Select a primary damage description (i.e., a description of where/how the vehicle suffered the majority of its damage).
- **Damage Secondary** – Select a secondary damage description (if applicable).
- **Colors** – Type in the colors and codes.
- **Description** – Type a description for the vehicle. This is the description recorded for the vehicle’s AUT (automobile) record.
- Use the remaining fields to add or edit any other known information about the vehicle. When available, some fields, such as **Engine Size**, populate after the vehicle has been added to your inventory with information decoded from the VIN.

Vehicle – Title Tab
On the Title tab, add or edit information about the vehicle’s title. This information is used for NMVTIS reporting.

⚠️ Notes: The options in the **Title Status** and **VIN Status** fields are set up in your Checkmate settings.

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6 You can maintain these options in Checkmate Retro:
- **Title Status** options – Use the Change or Delete Parts function (Checkmate Full: 2,5. Checkmate Classic: I3) to edit a vehicle’s AUT, and then maintain the Title Status.
- **VIN Status** options – Use the VIN Status Table Maintenance function (Checkmate Full: 6,25. Checkmate Classic: S20).
On the **Purchased from** tab, type in info about where the car was purchased.

If the car has been sold, put in the sales information on the **Sold to** tab.

**Vehicle – Notes Tab**

On the **Notes** tab, you can view and add notes to associate with the AUT (automobile) record.

- Existing notes display in the top of the tab.
- Add a note by typing it in the **New Note** text box. New notes are added to the vehicle when you click the save button. 

  If this is a note for the dismantler, click to check the **Dismantle** box. If this vehicle is pulled into Partmate, this note will print on the Partmate **Dismantling Report**.
Vehicle – Imaging Tab

On the Imaging tab, you can:

- **Add Image** – Add an image from your hard drive
- **Delete Image** – Delete the selected image
- **Set Primary** – Configure the selected image as the **Primary** image. If a part has no part images the AUT’s primary image will be used as the thumbnail in online part listings.
- **Set Private** – Mark the selected image as **Private**. Private images are visible in Checkmate, but they do not upload to online listings.

⚠️ **Notes:** You can drag and drop images from your hard drive into the Imaging tab to associate them with the vehicle. To add multiple images at one time using this method, hold down the **Ctrl** key while selecting the images and then drag them into this tab.

You can use Photomate to add images to the vehicle; just click the Photomate button to send the vehicle to Photomate.

Vehicle – History Tab

The History tab displays information about the vehicle’s history including:

- **Parts Sold**
  - Click to highlight a part and then click **View** to see the invoice for that part.
- **Parts Deleted**
- **Parts Remaining**

For more details about the info that displays on this tab, refer to the **Vehicle History** section of this guide.
Adding a Part

To add a loose part to your inventory, follow these steps:

1. On the **Find** tab, click the add part button.

2. The **Part – Add** tab opens. Use this tab to add part information. For more info about this tab, refer to the **Part Tab** section of this guide.

   **Note:** If you want to add this part to an existing vehicle, you can click the **Find Vehicle** button to find the stock number. For more info about this function, refer to the **Find Vehicle** section of this guide.
3. When you’ve finished putting in the part information, click the save button. The part is added to your inventory and displays in the parts grid on the **Find** tab.

![Find Vehicle](image)

**Find Vehicle**

When you’re adding a loose part to your inventory, you can use the **Find Vehicle** function to find the stock number of a vehicle already in your inventory to add the loose part to. To use this feature, follow these steps:

1. On the **Part – Add** tab, click **Find Vehicle**
2. The **Find Vehicle** window opens. Put in your search criteria:
   a. Select a **Model** using the drop-down box.
   b. To narrow your results by year, type a **Year**. To search a range of years, type an ending year in the **Range** field.
   c. Check the **Include Crushed Vehicles** box if you want to include AUTs with a vehicle category of **Crushed**.

3. Click **Find Vehicle** to search for vehicles.

4. The **Inventoried Vehicles** column displays inventoried vehicles that match your search. Click to highlight a vehicle in the **Inventoried Vehicles** section, and the **Inventoried Parts** column displays the parts you currently have inventoried from that vehicle.

   To select a vehicle as the stock number to add your loose part to, click to select the vehicle in the **Inventoried Vehicles** column.
5. Click **Add Part to Selected Vehicle**.

The vehicle’s stock number is now populated in the **Stock No.** field on the **Part – Add** tab. Now you can continue adding the loose part.
Editing a Part

To edit a part, follow these steps:

1. In your search results on the Find tab, locate the part you want to edit and double-click it. Or, click on it, and click the edit button.

2. The part displays on the Part – Edit tab. Use this screen to edit the part information. For more info about this tab, refer to the Part Tab section of this guide.

3. When you’ve finished editing, click the save button.
Part Tab

On the Part tab, you can add a part to your inventory and edit existing inventory. Fields in green text are required fields.

As you’re working on this tab use the buttons on the left side of the tab to:

- Print a snapshot of your screen. Refer to the Printing the Screen section of this guide for more info.
- Print part tags right away, or add parts to the tag queue (keyboard shortcut: Ctrl+T). Refer to the Printing Part Tags/Adding Parts to Tag Queue section of this guide for more info.
- View additional information including Vehicle History, Part History, Part Requests, and Interchange Application. For more info about these options, refer to the Part and Vehicle Information and Interchange Application and Notes sections of this guide.
- Assign the part to Photomate to have photos taken. Refer to the Sending Parts to Photomate for Photos section of this guide for more info.
- Delete the current part from your inventory. Refer to the Deleting Inventory section of this guide for more info.

Use the following fields to add or edit part information on the Part tab:

- **Stock No.** – Add or edit the stock number that you would like to associate this part with. If an existing AUT matches the stock number that you entered, the Year, Model, and Location fields populate with information from the AUT.

  If you’re adding a part and the stock number does not match an AUT already existing in your inventory, you must manually fill out the Year, Model, and Location fields.

  **Note:** If you’re adding a part and want to add it to an existing vehicle but you don’t know that vehicle’s stock number, click the Find Vehicle button to find the stock number. For more info about this function, refer to the Find Vehicle section of this guide.

- **Part** – If you’re adding a part, use the Part drop-down menu to select the part you’re adding.
• **Interchange** – This field is active if interchange is available for this part. Click the down arrow and choose an interchange option. To do so:
  
  o Click the checkbox for the interchange option you want to assign to this part
  
  o In the **Line to Select** field, type the line number for the option you want to select and press **Enter**.

  ![Interchange Drop-down](image)

  In the **Interchange** drop-down, you can also:

  o Limit your **Interchange** choices by **SmartVin/IC**\(^7\) (only applicable if there is a VIN associated with the vehicle this part is from). To see all interchange choices, select **All ICs**.

  o View interchange application information for an interchange option, by clicking to highlight an option and then clicking the **APP** button.

Once an interchange option is selected and a part is saved, statistics for that option display on the blue bar in the middle of the screen next time you edit the part.

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\(^7\) **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.
• **Miles/Cond:**
  - Mechanical parts: Enter the mileage. If the stock number that is entered matches an existing AUT, the mileage from the AUT record is already populated in this field.

    If this doesn’t happen automatically (or if you selected one of the options mentioned below, and wish to undo your selection and populate with information from the mileage again) click the magnifying glass.

  - Body parts: After you enter the damage on the ARA Damage tab, this field will populate with the appropriate units of damage.

    If this doesn’t happen automatically (or if you selected one of the options mentioned below, and wish to undo your selection and populate with information from the ARA Damage tab again) click the magnifying glass.

Alternatively, click the down arrow to specify the condition of the part:

- **CLEAR** – No condition
- **000** – Zero damage (not available in the drop-down if the part has ARA damage)
- **NIB** – Negative information: B quality part (this downgrades the part to a B)
- **NIC** or **NIQ** – Negative information: C quality part (these downgrade the part to a C)

• **Description** – Type a description for this part. Click the Add Description button to copy the interchange description to the part Description field (not available for Car-Part Interchange Plus parts). This is the description that appears in the part’s online listing.

• **Retail** and **Wholesale** – Put in pricing for this part. If you’re adding a part and you don’t enter a price for the part but you do have Price Book amounts for the selected interchange, the Price Book amounts will be applied to the part when you save the part. For more info about the Price Book, refer to the Part – Price Book Tab section of this guide.

**Note:** On the Part tab, you can:

- Launch a Trading Partners search by pressing your Price or Buy F-key.
- Launch a CrashLink search by pressing your designated CrashLink F-key.

• **Date Code** – The current date code (only applicable if your settings are configured to use the cent field to indicate the date a part was last priced). If you have the date code set up:

  - The date code populates as the cents value if you type a price with just a dollar amount and no cents value.
  - The date code does not populate as the cents value of a price if the price you enter for the part includes a cents value.

• **Quantity** – If you’re adding a part, type how many of this exact loose part you are adding.

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8 The date code is configured in Checkmate Retro using the Change Inventory Questions function (Checkmate Full: 6,10,3, Checkmate Classic: S3,3.)
- **Review** – Check this box if the part needs to be reviewed by a manager. This flags the part for review in Checkmate and Partmate Review (for Advanced Partmate subscribers).

- **Private** – Check this box if you don’t want this part to be listed on Car Part Pro, Car-Part.com, Trading Partners, or eBay.

- **Make Available** – If you’re editing a part with a certain status, editing may be restricted. In some cases, you can click the Make Available checkbox to change the status of the part and remove editing restrictions.
  - If the part is on a work order or an unposted invoice, making the part available removes the part from the work order or invoice.
  - If the part is on hold, making the part available removes the part from hold (the part remains on the quote).
  - If the part has been deleted and is waiting for a manager’s approval, making the part available puts the part back in inventory.

The part will be made available when you save the part.

- **Print Part Tag on Save** – Choose a part tag option:
  - **No** – Don’t print a tag for this part
  - **Yes** – Print a tag as soon as you save this part
  - **Queue it** – Add the part to the tag queue to be printed at a later time

Use the tabs at the bottom of the screen to view, add, or edit notes, ARA damage, the Price Book, images, and part history. Refer to the following sections for more info.

When you’ve finished adding or editing the part, click the save button.

**Part – Notes Tab**

On the **Notes** tab, you can view existing notes and add new notes to the part.

- Existing notes display in the top of the tab.
- Add a note by typing it in the **New Note** text box.

Notes are permanent; they cannot be removed. When you save the part, the note is added to the part as a private part note. (Private notes are only visible to your sales staff in your software; they don’t show in online part listings.)
**Part – ARA Damage Tab**

The **ARA Damage** tab is only available for body parts. On this tab, you can assign ARA damage codes to body parts with point-and-click graphics. You can also type the damage code directly into the damage fields. As a result, the part’s grade updates according to the amount of damage. To assign a damage code to a part, follow these steps:

1. Click the number on the image to indicate where the part’s damage is located, or click the **Damage All Over** button at the bottom of the tab, if the part is damaged all over.

   **Note:** If there are multiple damage images available, the **Next Image** button displays. Click to see images for different body styles.

2. Select the type of damage from the list that displays.

3. Under **Primary Damage**, use the arrow buttons to select the amount of damage.
   - Click the outer buttons to increment the damage by 1 unit.
   - Click the inner buttons to increment the damage by 0.25 units.

   ![Damage Code](image)

   As you do this, the damage code is generated, and the part’s condition is automatically updated according to the damage you designate.

4. If necessary, use the arrow buttons under **Secondary Damage** to assign secondary damage.

   ![Secondary Damage](image)

   If needed, you can click **No Damage** to reset this part to zero damage.

5. When you’re finished on this tab, continue working on the other tabs, or click the save button to save your work and return to the **Find** tab.
Part – Price Book Tab

The Price Book tab has two sections:

A. Price Book – The left side displays your Price Book prices and history for the interchange option that’s selected for the part you’re adding or editing. Use this section to view and edit your Price Book prices. For more info, refer to the Editing the Price Book section of this guide.

B. Part Inventory – The right side displays the inventory you currently have with the selected interchange number. Use this section to view and edit your existing part inventory. For more info, refer to the Price Book – Editing Part Inventory section of this guide.

⚠️ Note: If you’re editing a part that is currently on a work order, the Price Book tab is disabled.

If your settings are configured to use the date code⁹:

- The date code populates as the cents value if you type any price on this tab with just a dollar amount and no cents value.
- The date code does not populate as the cents value of a price if the price you enter includes a cents value.

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⁹ The date code is configured in Checkmate Retro using the Change Inventory Questions function (Checkmate Full: 6,10,3, Checkmate Classic: 53,3.)
Editing the Price Book

On the Price Book tab, the Price Book section displays Price Book prices for the interchange option that’s selected for the part you’re adding or editing.

- To view Price Book History, click Price Book History.

**Price Book History** displays below the Price Book section.

- To edit the current Price Book prices, click inside the Retail, Wholesale, Export, Core and Undamaged (body parts only) fields and type the New price(s).
To indicate that you reviewed and approved the Price Book *without* changing prices, click **Verify**. When you save your changes, a new entry is created in the part’s **Price Book History**.
Price Book – Editing Part Inventory

On the Price Book tab, the Part Inventory section lists your existing inventory for the interchange option that’s selected for the part being added or edited. Use this section to view and edit prices for existing inventory.

⚠️ Note: The first part listed in the Part Inventory section is the part that is currently being added/edited in the top part of the Part tab. Any pricing changes made in the top of the Part tab are reflected in the Part Inventory section and vice versa.

Editing prices in the Part Inventory section can be done in several ways:

- **Apply Price Book prices** – Set the prices of parts in your inventory to your Price Book prices by checking the boxes in the Select column for each part you want to update. The prices for this part will be updated when you click save.

<table>
<thead>
<tr>
<th>Notes</th>
<th>AKA Damage</th>
<th>Price Book</th>
<th>Imaging</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

- **Edit individual part prices** – Click inside the Retail or Wholesale fields to manually type in a price for an individual part. When you do this, the box in the Select column is automatically checked for that part. If you leave the box checked, the prices for this part will be updated when you click save.

![Part Inventory - FDR-502418 RH](image)

- **Bulk edit part prices** – Make bulk edits to part prices by selecting parts to edit and then clicking Edit Retail or Edit Wholesale. For more info, refer to the Bulk Edit Base Retail or Base Wholesale Price section of this guide.

![Part Inventory - FDR-502418 RH](image)
**Part – Imaging Tab**

On the **Imaging** tab, you can add and edit images for a part. Use the buttons to:

- **Add Image** – Add an image from your hard drive
- **Delete Image** – Delete the selected image
- **Set Primary** – Configure the selected image as the **Primary** image in Checkmate and online listings. The **Primary** image is the thumbnail image for the part’s online listings.
- **Set Private** – Mark the selected image as **Private**. Private images are visible in Checkmate but they don’t show in online part listings.

⚠️ **Notes:** You can drag and drop images from your hard drive into the **Imaging** tab to associate them with the vehicle. To add multiple images at one time using this method, hold down the **Ctrl** key while selecting the images and then drag them into this tab.

To send this part to Photomate to have photos taken, click the Photomate button. The part will be sent to Photomate for images when you save the part.
Part – History Tab

If you’re editing a part, the History tab displays information about the edit history of the part while it’s been in your inventory.
Printing the Screen

On any tab in the Inventory tool, you can print a snapshot of your screen by clicking the printer button.

Depending on the size and resolution of your screen, some information may be cut off. For best results, you may need to adjust your printer Properties.
Printing Part Tags/Adding Parts to the Tag Queue

Part tags can be printed from search results on the Find tab, and when adding or editing a part on the Part tab.

⚠️ Note: Add or edit your part tag printer by going to Settings>Workstation and clicking the Printers tab.

In search results on the Find tab:

- Click the tag button 🔄 to print a tag for the highlighted part right away.

- Click the down arrow on the tag button 🔄 for more options:
  
  - Print Selected Part Tags – Immediately prints tags for parts that have a check in the checkbox column.
  
  - Add Part to Tag Queue – Adds the highlighted part to the tag queue to print later.
  
  - Add Selected Parts to Tag Queue – Adds the parts that have a check in the checkbox column to the tag queue to print later.
  
  - Part Tag Queue – Opens the part tag queue.

When adding or editing a part on the Part tab:

- Click the tag button 🔄 to immediately print a tag for the part you’re adding or editing.

- Click the down arrow on the tag button 🔄 and select Add Part to Tag Queue to add the part to the tag queue to print later.

For more information about the part tag queue, refer to the Part Tag Queue section of this guide.
Part Tag Queue
You can view and edit the parts that are in the part tag queue from the Find tab or the Part tab. To do so, follow these steps:

1. Click the down arrow on the tag button and select Part Tag Queue.

2. The Part Tag Queue window opens, listing each part that is currently in the tag queue.
   - **All Tags** – Indicates the total number of parts in the queue.
   - **My Tags** – Indicates how many parts were added to the queue by the current user.

Select from the following options:

- **Print Only Mine** – Check this box to display and print only the parts that were added to the queue by the current user.
- **Remove Entry** – Deletes the highlighted part from the tag queue.
- **Refresh** – Refreshes the tag queue.

3. When you are satisfied with your list, click Print Tags to print the tags, or click Close to close this window.
Part and Vehicle Information

When you’re working in the Inventory tool, you can access additional information about parts and vehicles by clicking the blue info button.

- Click the button to view **Vehicle History**.
- Click the down arrow for more options:
  - VIN Decode
  - Copy VIN
  - Part History
  - Part Requests
  - Interchange Application Notes

(Not all options are available on all tabs.)

**Vehicle History**

The **Vehicle History** window displays information about the selected/displayed vehicle including a list of parts that were sold, parts that were deleted, parts that are available, and AUT information.

**Parts Sold**

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

Click the Stock # button to load all of these parts on the Find tab.

⚠️ Warning! Clicking the Stock # button completely replaces any search results that were previously showing on the Find tab.
AUT
The AUT tab shows display-only AUT information for this vehicle. For more information about editing a vehicle, refer to the Editing a Vehicle section of this guide.

VIN Decode
The VIN: decode window displays information that is able to be determined about a vehicle based on the VIN. Use the buttons at the bottom of the window to Email or Print VIN decode information. Click Close to close this window.
**Part History**

The **Part History** window displays a part’s edit history.

![Part History Window]

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

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

![Part History Window with Right Click]

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 History Table]

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**Part Requests**

The **Part Requests** window gives information about the times this part has been looked up at your business. The title bar of the window gives the time frame that requests are being displayed for.
**Interchange Application and Notes**

To view interchange application information for a part, click the down arrow on the info button [ ] and select **Application Notes**.

- **Find** tab – Interchange application displays for the part in your search results that’s highlighted
- **Part** tab – Interchange application displays for the part you’re adding or editing.

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.
- **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.

- **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 added by Checkmate users; you cannot modify Car-Part Interchange notes.
Interchange Contribution

In the Inventory tool, you have the ability to submit interchange contributions to Car-Part.com’s Interchange Development team. Use this feature when you want to submit information that would 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. Locate the part you want to submit an interchange contribution for:
   - **Find** tab – Click to highlight a part with the interchange option you want to submit a contribution about.
   - **Part** tab – The contribution will be submitted about the interchange option that is currently selected for the displayed part.

2. Click the down arrow on the info button and select **Application Notes**.

3. The **Interchange Application and Notes** window opens. Click the **IC Contribution** button.
4. The Interchange Contribution window opens.

The information on this window will be sent to our Interchange Development team.

- **Contribution** captures General Information about the user logged into Checkmate and the vehicle the part is associated with.

- **Results Screen** captures a screenshot of the Interchange Application window.

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

5. Click Email. 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 are sent as an email attachment. It is 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 Email.

6. If the email did not automatically send, send the email to ICContributions@car-part.com
Sending Parts to Photomate for Photos

Photomate is a mobile app that allows you to perform certain inventory management tasks right on your mobile device. This includes adding photos to parts. (Learn more about Photomate at http://products.car-part.com/photomate/)

In the Inventory tool, you can use the Photomate button ✉️ to send parts to Photomate for photos. You can do this on all three tabs:

- **Find** tab – In your search results, check the boxes in the checkbox column for the parts you want to send to Photomate.

- **Vehicle** tab – Part selection is not necessary. The AUT record for the vehicle that’s currently displayed will be sent to Photomate to add photos to the automobile record.

- **Part** tab – Part selection is not necessary. The part that’s currently displayed will be sent to Photomate to add photos to the part.

To send the part(s) to Photomate from any tab, follow these steps:

1. Click the Photomate button.

2. 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 to the employee. The Task Comment is added to each part being sent to Photomate.

3. Click **Accept**. The part(s) are sent to the Photomate application. For more information about using Photomate, see the Photomate user guide.
Deleting Inventory

The Inventory tool allows you to easily delete parts from your inventory.

⚠️ **Note:** You cannot delete AUT (automobile) records.

- On the **Part** tab, delete the part that’s currently displayed by clicking the trashcan button.

- On the **Find** tab:
  - Click to check the boxes in the checkbox column for each part you want to delete.
  - Click the trashcan button.
When you click the trashcan, a window displays for you to specify the **Reason for Removal**. The reason you enter can be viewed in several places in Checkmate:

- Sales Pro and Inventory tool: **Vehicle History** window, **Parts Deleted** tab
- Dashboard tool: **Removed Inventory** gadget
- Checkmate Retro: **Print Transaction Report** function\(^{10}\)

Type the reason and then click **Accept**.

![Bulk Removal](image)

A confirmation message displays. When you confirm the removal, the part(s) are deleted from your inventory.

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

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\(^{10}\) Checkmate Full: **5,6**. Checkmate Classic: **V6**.
Relocating a Vehicle

If you edit the location for a VUC (temporary vehicle record), you can apply the change to other parts on that vehicle that were moved along with the VUC. To use this feature, follow these steps:

1. On the Find tab, search for the VUC you’re relocating.
2. Locate the VUC in your search results and double-click to edit the part.
3. The VUC displays on the Part – Edit tab. Type in the new Location for the VUC.
4. Click the save button. 
5. The Move Parts with Vehicle Stock No. window opens.
   - When this button is displayed, all parts that share the same stock number and location as the vehicle you’re relocating display on this window.
   - When this button is displayed, all parts that share the same stock number as the vehicle you’re relocating display on this window, regardless of location.

If you want to also change the location of the other parts associated with this stock number to the VUC’s new location, click to check the box for each part you want to change the location for.

6. Click Accept to apply the changes. The location for all checked parts update to the new location.
Crushing a Vehicle

This section explains the updates that need to be made in your inventory management system when you crush a vehicle. This is a multi-step process:

- Delete scrapped parts
- Restock unbolted parts that weren't scrapped
- Update AUT record

To crush a vehicle, follow these steps:

1. On the Find tab, type in the Stock number for the vehicle you’re crushing.
2. Click the magnifying glass button.
3. Each part associated with that stock number displays in your search results. In the Category column:
   - Click the filter button and uncheck the W option to filter out parts on this stock number that are in the warehouse and not being scrapped.
   - If you are not scrapping the unbolted parts associated with this stock number, uncheck the U option to also filter out parts on this stock number that are unbolted.
4. Once you have filtered out the parts you are not scrapping, click to check the top box in the checkbox column to select all of the remaining parts. If there are any parts you want to save, uncheck the boxes for those parts.

5. Click the trash can button.

6. In the window that appears, type the **Reason for removal** and click **Accept**.

7. A message appears asking you to confirm the deletion. If you're sure, click **Yes** to permanently remove the selected parts from your inventory.

⚠️ **Warning:** Do not delete parts unless you're sure. Deleting inventory cannot be undone!
8. The remaining parts associated with that stock number display on the **Find** tab. If you are not scrapping the unbolted parts from the vehicle, these parts must be restocked. If you don’t have any parts to restock, skip to the next step. To restock unbolted parts:

   a. On the **Category** column, click the filter button 📊 and use the checkboxes so only the **U** is selected for unbolted parts.
   
   b. Click to check the top box in the checkbox column to select all displayed parts.
   
   c. Use the **Cat** column to edit the category.

      • To edit the category for all checked parts at once, click the **Edit Cat** button at the top of the column bulk edit the selected parts (refer to the **Bulk Editing** section of this guide for more info.)
   
   d. Use the **Location** column to adjust each part’s location as necessary:

      • To edit the location for all checked parts at once, click the **Edit Location** button at the top of column to bulk edit the selected parts (refer to the **Bulk Editing** section of this guide for more info.)
      
      • To edit the location for one part, click in the **Location** field, and type the new location.

   ! **Note:** You can also use the Photomate app to relocate parts. Refer to the Photomate user guide for more information.

   e. Click the save button.

9. Next, you need to update the AUT record for the vehicle. Locate the AUT record in your search results and double-click it. (You may have to remove display filters for the AUT record to display.)
10. The AUT record opens on the **Vehicle – Edit** tab. From here:
   
a. Change the **Location** to your crush location.

b. Change the **Vehicle Category** to **Crushed**. When you save your changes, the **Crush Date** will automatically populate with the current date.

c. If you use the **Disposition**, change it to **Crushed**. When you save your changes, the **Disposition Date** will automatically populate with the current date.

d. If you already know the scrap buyer and amount, put in that information on the **Title > Sold To** tab, and in the **Scrap Amount** field.

e. Click the save button. The crushing process is now complete.
Restocking Returned Parts

When accepting a part return in Sales Pro and the Restock field on the return invoice is set to Now, when you print the credit invoice, the Inventory tool opens with the part(s) you’re returning displayed to restock.

To restock parts:

1. For each part being restocked:
   a. Click inside the Location field.
   b. Type the new location.
   c. (Optional) Make any other changes.
2. Click the save button.

⚠️ Note: If you want to make more extensive edits to a part, double-click the part to open the part for editing on the Part tab.
Keyboard Shortcuts

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

**All Tabs**
- Ctrl+R – Resets the screen
- Ctrl+S – Saves all changes

**Find Tab**
- Ctrl+F or Ctrl+Enter – Starts a search
- Ctrl+H – Opens the Vehicle tab to add a vehicle
- Ctrl+P – Opens the Part tab to add a part
- Ctrl+E – Opens the currently highlighted part for editing
- Ctrl+T – Prints part tag for the highlighted part

**Vehicle Tab**
- Ctrl+F – Opens the Find tab

**Part Tab**
- Ctrl+F – Opens the Find tab
- Ctrl+T – Prints a part tag for the part being added/edited
Appendix: Part Information Columns

In the Inventory tool, there are several places where you can customize the information that’s visible for each part by editing which columns are displayed.

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

To change which columns display, 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 configuration for the current tab/window for the entire workstation.
4. To save this configuration, close and re-open Checkmate Workstation.

Available information columns are listed below.

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

- Part – Checkmate part code
- Part # – Numeric part code
- 2 Character Code – Two-character part code
- Part Name – Full part name
- Year – Vehicle year
- Model – Vehicle model
- Model Name – Full vehicle model name
- Grade – Part grade
- Description – Part description (this description is uploaded to online part listings)
- Interchange Description – Description from Car-Part Interchange
- Recommend – Indicates Checkmate’s recommendation for this part regarding price or stock level. This is determined by your inventory data and sales and request history.
  - EXTRA – You have a lot of this part in stock and have had them in stock for a while.
  - FIRMS$ – This part is neither overpriced or underpriced so you may want to remain firm on the price.
  - LIKE – You have demand for this part but you may not have an adequate quantity on hand.
  - LOWS$ – You sell this part more often than expected which may indicate the price is too low and should be raised.
  - NEED – You have significant demand for this part and you don’t have adequate inventory.
  - OVER$ – You have lost sales for this part which may indicate the price is too high and should be lowered.
  - PUSH – There is not much demand for this part and you have a lot in inventory, so your salesperson may wish to push the sale.
SAVE – You are likely to sell this part so you may want to remove it from the car before crushing.
SCARCE – You don’t have this part and you’ve had 2 or more requests for this part.
SCRAP – There is a low likelihood of selling this part so you should consider scrapping or coring it.

- **Price Updated** – Date the part’s retail or wholesale price was last updated
- **Status** – Status of the part.
  - Blank – Part is available for sale.
  - H – Hold. This part is on hold. These parts display orange in search results.
  - I – Invoice. This part is on an invoice, but the invoice has not yet been posted. These parts display red in search results.
  - S – Sold. This part has been sold and the invoice has been posted. These parts display red in search results.
  - W – Work Order. This part is on a work order. These parts display red in search results.
  - Q – Quote. This part is on a quote. These parts display orange in search results.
  - D – Deleted. This status only appears in systems that are configured to have all part deletions reviewed by a manager before the part is removed from the system. D indicates that the part has been deleted but is still pending manager approval. These parts display red in search results.
  - E – eBay. This part is active on eBay. Click the button in the Status 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 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 or vehicle category
  - Categories for AUT (automobile) records:
    - NC – Not Cleared
    - OS – Offsite
    - NI – Not Inventoried
    - NS – No Sales
    - ND – Not Dismantled
    - ID – In Dismantling
    - D – Dismantled
    - C – Crushed
    - S – Sold
  - Categories for parts other than AUTs:
    - Y – Yard (the part is still bolted to the vehicle)
    - U – Unbolted (the part is unbolted but still in the vehicle)
    - W – Warehouse (the part is in the warehouse)
- **Stock** – Stock number
- **VIN** – Vehicle identification number
- **Location** – Part location
- **DIS** – Number of Days In Stock
- **Interchange** – Interchange number
- **Cost** – Price you paid for this specific part. Normally this information is only available for aftermarket parts.
- **Base Retail** – Retail price of the part
- **Base Wholesale** – Wholesale price of the part
- **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** displays either the price in the Coremate data or your Price Book core price, whichever is higher.
- **Cond** – Condition information (entered when the part was inventoried)
  - CLEAR – No condition
  - 000 – Zero damage
  - NIB – Negative information: B quality part
  - NIC or NIQ – Negative information: C quality part
  - CORE – Core part
  - CHECK – Needs to be checked
  - UNKNWN – Condition is unknown
- **Kind** – Part kind information (entered when the part was inventoried)
  - U – Used OEM
  - S – Surplus
  - N – New OEM
  - 0 – Zero miles OEM
  - T – New take off
  - M – Remanufactured
  - R – Rebuilt
  - A – Aftermarket
  - K – Used aftermarket
  - I – Incomplete
  - C – Core
- **Yard** – The Checkmate yard this part is inventoried under
- **Private** – Indicates whether this part is private. (Private parts are not uploaded to online part listings and are only available in your Checkmate system.)
- **Review** – Indicates whether the part is in Review. (Parts can be flagged for Review in Sales Pro, Partmate, or Photomate.)
- **Checked** – Indicates the number of days since the part was last edited
- **Quantity** – Quantity on hand for this part/interchange number
- **Tag** – Part’s tag number
- **CP Local** – Car-Part.com local request activity (available for Advanced Bidmate subscribers only)
- **CP Regional** – Car-Part.com regional request activity (available for Advanced Bidmate subscribers only)
- **CP Global** – Car-Part.com global request activity (available for Advanced Bidmate subscribers only)
- **Request** – Number of times a request has been made for this part at your business
- **Sales** – Number of times your business has made a sale on this part
- **Avg** – Average sale price of this part
- **NIS** – Not In Stock. Number of times you looked this part up in Checkmate but did not have it in stock.
- **Lost** – Lost sales. Number of times you looked this part up and you had it in stock, but you didn’t sell it.
- **Images** – Indicates which images are associated with this part.
  - ![Part Images](image.png) – There are part images associated with this part.
  - ![AUT Images](image.png) – There are AUT images associated with this part.
  - ![No Images](image.png) – There aren’t any images associated with this part.

To view, add, edit, email and print images, click the icon to open the **Image Viewer** window.
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–6:00 PM Eastern Time.

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!