

Private Part Notes: Checkmate, Partmate, and Photomate

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Overview

Part descriptions are normally visible to customers in your online part listings. But in some cases, you want to leave a note on a part that's only visible to your own staff.

Private Part Notes help you do just that. When you put a Private Part Note on a part, it's available to your team in your software, but it isn't visible to your customers in online part listings or on printed quotes/work orders/invoices.

You can use Private Part Notes in Checkmate Sales Pro, Checkmate Inventory Pro, Partmate, and Photomate. **Private Part Notes are permanent; once they're added, they can't be deleted.**

This document explains how and where Private Part Notes display, how they're added, and how they work between these programs.

(Checkmate) Viewing Private Part Notes

In Checkmate, Private Part Notes display in both Sales Pro and Inventory Pro*.

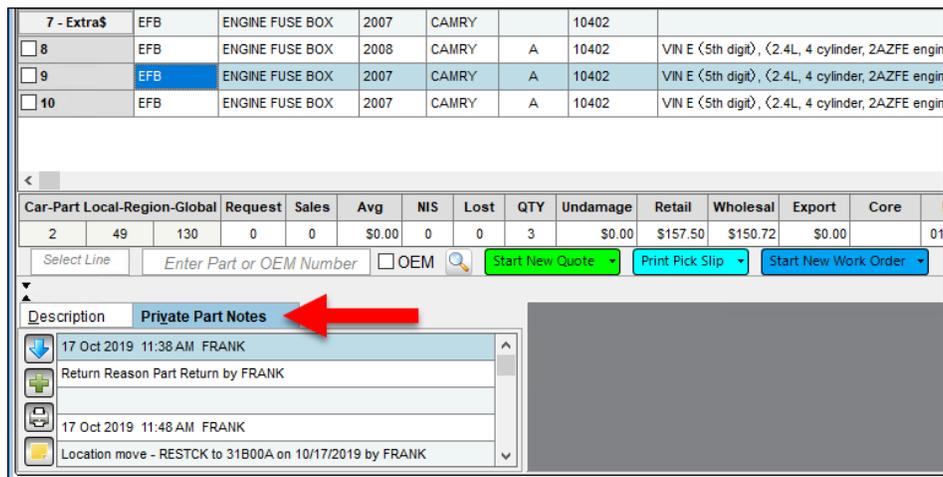
Sales Pro

Private Part Notes display in several places throughout Checkmate Sales Pro:

- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab
- **Credit>Returns** tab

Parts Tab

In Sales Pro, in part search results on the **Parts** tab, when you click to select a part that has a Private Part Note, the **Private Part Notes** tab in the lower-left of the screen displays the note.



The following functions are available:

-   Click to toggle the display order of the notes.
-  Click to add a private part note to the part.
-  Click to print the note(s). A window will display for you to select a printer.
-  Click to select which notes you want to be displayed:
 - **All Notes**
 - **Private Notes** (all notes except dismantler notes)
 - **Dismantler Notes**

* In Checkmate Retro, Private Part Notes are referred to as "Internal Notes." For more information about notes in Checkmate Retro, please refer to the Checkmate Retro "Full User Guide" which can be found at products.car-part.com/checkmate/training.html.

Quotes Tab, Work Order/Invoice Tab, Credits/Returns Tab

When you're selling or returning a part that has a Private Part Note on it, you can easily view the note. On the **Quotes**, **Work Order/Invoice**, and **Credits/Returns** tabs, click on a part. If it has a Private Part Note, the **Private Part Notes** tab in the lower right of the screen displays red.

Parts	\$250.00	Payments		Selected Part JOHN CUSTOMER			WO/Invoice Note	Part Note	Private Part Note	Order Tracker	Images
Warranty	\$0.00	Pmt #	Method of Payment	Amt Paid	WO	Date	Customer	SLS	Price	Grade	Fast Notes
Cores	\$0.00	1	Cash	\$250.00	148930	04/28/23	JOHN	RACHELB	\$250.00	C	
Freight	\$0.00				148920	03/20/23	INFO	PETERM	\$300.00	B	
Tax	\$0.00				148920	03/20/23	INFO	PETERM	\$300.00	A+	
Total	\$250.00	Remaining	\$0.00								Clear
Amt Paid	\$250.00	Deposited	\$0.00								Save
Save and Print Work Order >		Print/Promote to Invoice >		Print Label >		Work Order History		Save		Close	

Click on the **Private Part Note** tab to view the note.

Parts	\$250.00	Payments		Selected Part JOHN CUSTOMER			WO/Invoice Note	Part Note	Private Part Note	Order Tracker	Images
Warranty	\$0.00	Pmt #	Method of Payment	Amt Paid	WO	Date	Customer	SLS	Price	Grade	<div style="border: 2px solid red; padding: 5px;"> 2019-04-30 08:51:13 FRANK Assembly expiration set to 05/29/2019 </div>
Cores	\$0.00	1	Cash	\$250.00	148930	04/28/23	JOHN	RACHELB	\$250.00	C	
Freight	\$0.00				148920	03/20/23	INFO	PETERM	\$300.00	B	
Tax	\$0.00				148920	03/20/23	INFO	PETERM	\$300.00	A+	
Total	\$250.00	Remaining	\$0.00								Save
Amt Paid	\$250.00	Deposited	\$0.00								Close
Save and Print Work Order >		Print/Promote to Invoice >		Print Label >		Work Order History		Save		Close	

Part Notes vs Private Part Notes

In Sales Pro, on the **Quotes** tab and **Work Order/Invoice** tab, you will notice that there is a **Private Part Note** tab *and* a **Part Note** tab.

WO/Invoice Note	Part Note	Private Part Note	Order Tracker	Images
				
<input type="checkbox"/> Print				

Part Notes are *different* than Private Part Notes.

- **Part Note** – Added to the quote or work order, but is *not* added to the actual part record. These notes can be printed with the part on the quote or work order.
- **Private Part Note** – Added to the part as a permanent Private Part Note. It is visible in Checkmate, but does not print on quotes, work orders, or invoices.

Inventory Pro

In Inventory Pro, you can view the private part notes for a part on the **Part – Edit** tab, on the **Notes** tab.

The screenshot shows the 'Part - Edit' window in Inventory Pro. The 'Notes' tab is selected, and a red arrow points to the 'Notes' button in the top navigation bar. The notes list contains the following entries:

- 10/17/2019 - 11:48:22 AM - FRANK
Location move - RESTOCK to 31B00A on 10/17/2019 by FRANK
- 10/17/2019 - 11:38:19 AM - FRANK
Return Reason Part Return by FRANK

Below the notes list is a 'New Note' text area.

You can view the notes on an AUT record on the **Vehicle – Edit** tab by clicking the **Notes** tab.

The screenshot shows the 'Vehicle - Edit' window in Inventory Pro. The 'Notes' tab is selected, and a red arrow points to the 'Notes' button in the top navigation bar. The notes list contains the following entries:

- 04/30/2019 - 8:51:15 AM - FRANK
Note from AUT
burn listed as interior, unsure if eng is damaged!
- 05/14/2019 - 9:39:44 AM - FRANK
Note from HLP
Return Reason Part Return by FRANK
- 05/31/2019 - 10:35:18 AM - FRANK
Note from ALT
Return Reason Part Return by FRANK
- 06/12/2019 - 10:36:31 AM - FRANK
Note from ACL
Return Reason Part Return by FRANK
- 08/08/2019 - 4:21:47 PM - BEN
Note from VUC
Location move - FTWCAR to 13B on 08/08/2019 by BEN

Below the notes list is a 'New Note' text area with a 'Dismantle' checkbox.

(Checkmate) Adding Private Part Notes

Note: When a Private Part Note is added to a part in Checkmate (or Photomate), a copy of the note is also placed on the AUT record of the vehicle the part is from. (So you'll still have a record of the note even after the part is deleted from your inventory.)

Sales Pro

In Checkmate Sales Pro, you can add a private note to a part wherever there's a **Private Part Note** tab. You'll find it on the following tabs:

- **Parts** tab
- **Quotes** tab
- **Work Order/Invoice** tab
- **Credits>Returns** tab

To add a Private Part Note:

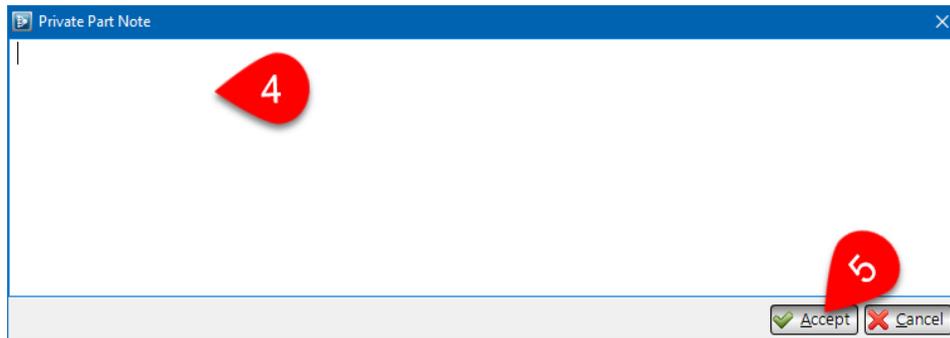
1. Click on the part you want to add the Private Part Note to.
2. Click the **Private Part Note** tab. (Any existing Private Part Notes display on this tab.)

The screenshot shows the SalesPro interface for a quote. At the top, it displays '2010,CAMRY' and 'JANE CUSTOMER'. Below this are tabs for 'Find', 'Interchange', 'Parts', 'Quotes', 'Work Order / Invoice', 'POs', and 'Credits / Returns'. The 'Quotes' tab is active, showing a quote for 'JANE CUSTOMER' with a status of 'Active'. The quote details include a list of parts to be removed, such as '1 - Remove' and '2 - Remove'. A red circle with the number 1 highlights the 'Part' column in the quote table. Below the quote table, there are sections for 'Parts', 'Warranty', 'Cores', 'Freight', 'Est. Tax', and 'Total'. A red circle with the number 2 highlights the 'Private Part Note' tab in the bottom right section of the interface.

3. Click the plus sign button to add a new note. (You must be in edit mode to add a private part note from the **Quotes** tab or **Work Order/Invoice** tab.)

This close-up screenshot shows the 'Private Part Note' tab in the SalesPro interface. It displays a list of notes with columns for 'Quote Note', 'Part Note', 'Private Part Note', and 'Images'. A red circle with the number 3 highlights a plus sign button next to an existing note. The note text reads: '2019-05-31 11:32:21 FRANK' and 'Assembly expiration set to 08/29/2019'.

4. The **Private Part Note** window displays. Type the note.



5. Click **Accept**. The Private Part Note is added to the part.

Note: When you add a Private Part Note to a part in Checkmate (or Photomate), a copy of the note is also placed on the AUT record of the vehicle the part is from. (So you'll still have a record of the note even after the part is deleted from your inventory.)

Part Returns

When a part is returned, a Private Part Note is automatically added to the part that gives the reason for the return and the salesperson that made the return.

Description	Private Part Notes
 17 Oct 2019 11:38 AM FRANK	
 Return Reason Part Return by FRANK	
	
	

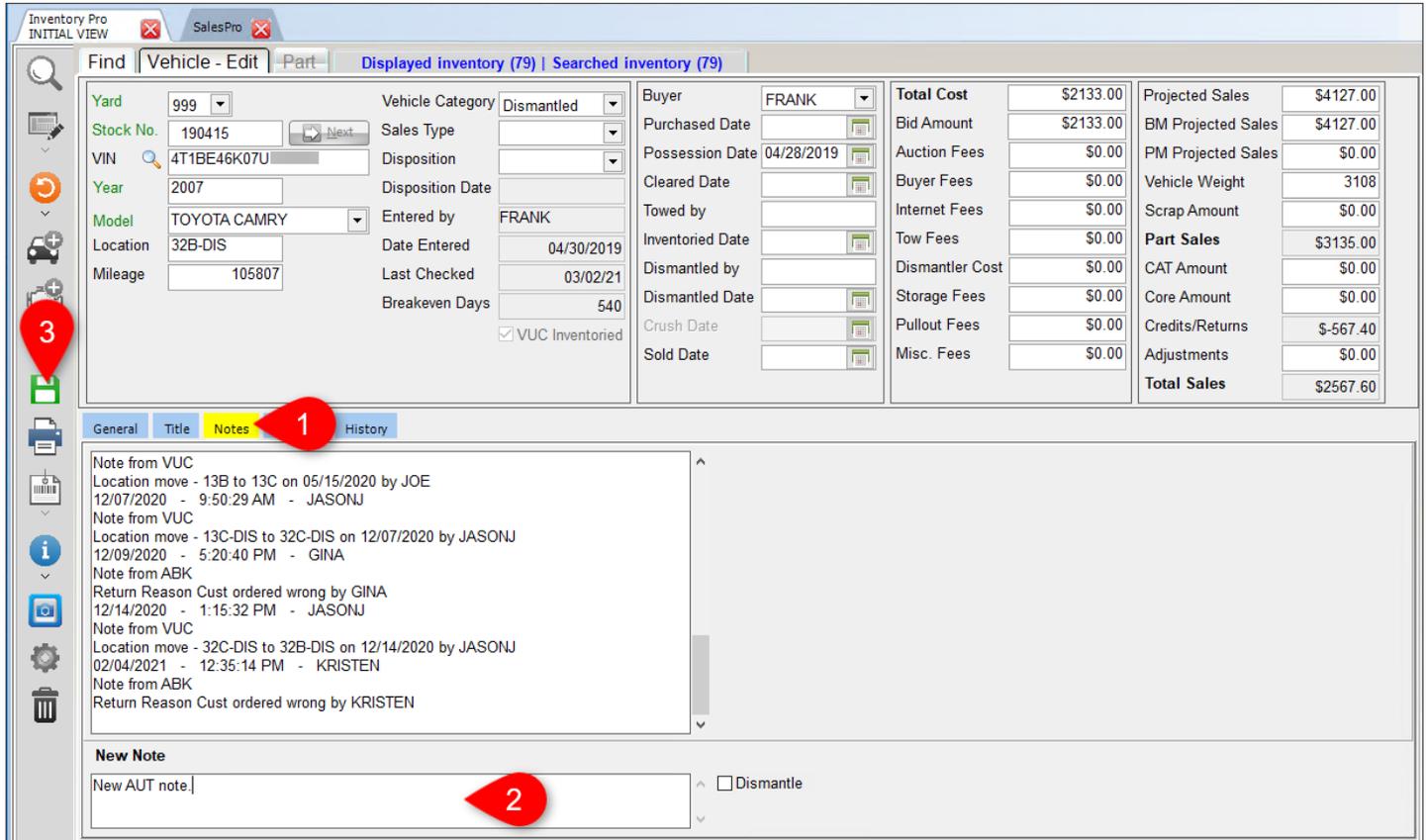
Inventory Pro

In Checkmate Inventory Pro, you can add notes when adding or editing vehicles and parts.

Private Part Notes on AUT Records

To add a note to an AUT record when adding or editing a vehicle, follow these steps:

1. With the vehicle displayed on the **Vehicle** tab, click the **Notes** tab.
2. In the **New Note** field, type the note you want to add.
 - If this is a dismantling note that you want to print on the dismantling report, click to check the **Dismantle** checkbox.
3. Click the save button. 



The screenshot shows the 'Inventory Pro' software interface. The top navigation bar includes 'Inventory Pro INITIAL VIEW' and 'SalesPro'. The main area is divided into several sections:

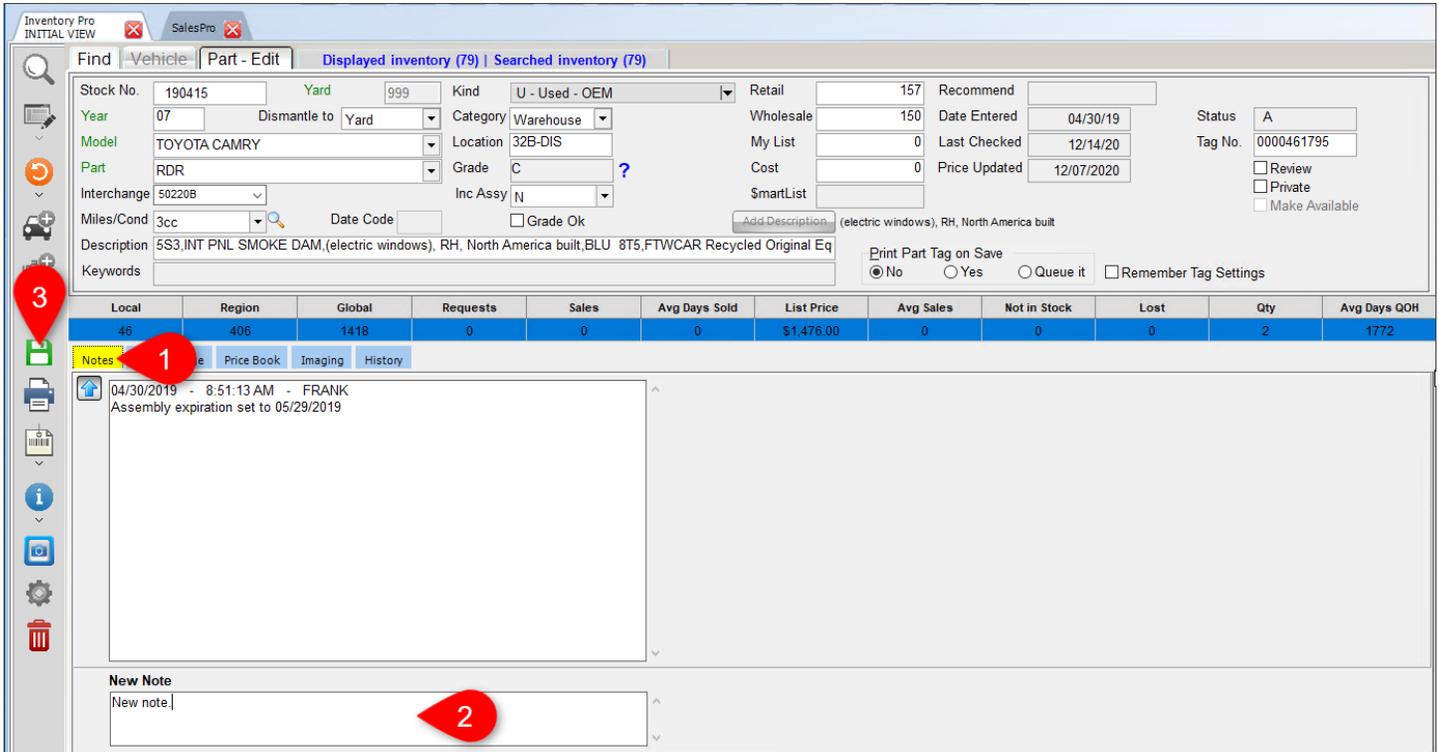
- Vehicle Information:** Yard (999), Stock No. (190415), VIN (4T1BE46K07U), Year (2007), Model (TOYOTA CAMRY), Location (32B-DIS), Mileage (105807). Vehicle Category is 'Dismantled'.
- Buyer Information:** Buyer (FRANK), Purchased Date, Possession Date (04/28/2019), Cleared Date, Towed by, Inventoried Date, Dismantled by, Dismantled Date, Crush Date, Sold Date.
- Costs and Fees:** Total Cost (\$2133.00), Bid Amount (\$2133.00), Auction Fees (\$0.00), Buyer Fees (\$0.00), Internet Fees (\$0.00), Tow Fees (\$0.00), Dismantler Cost (\$0.00), Storage Fees (\$0.00), Pullout Fees (\$0.00), Misc. Fees (\$0.00).
- Projected Sales:** Projected Sales (\$4127.00), BM Projected Sales (\$4127.00), PM Projected Sales (\$0.00), Vehicle Weight (3108), Scrap Amount (\$0.00), Part Sales (\$3135.00), CAT Amount (\$0.00), Core Amount (\$0.00), Credits>Returns (\$-567.40), Adjustments (\$0.00), Total Sales (\$2567.60).

The 'Notes' tab is selected, showing a list of notes. A red callout '1' points to the 'Notes' tab. Below the list is a 'New Note' field with a red callout '2' pointing to it. A 'Dismantle' checkbox is visible next to the field. A red callout '3' points to the save button (a green floppy disk icon) in the bottom left corner of the interface.

Private Part Notes on Parts

When adding or editing parts, you can view/add a private part note on the **Part** tab:

1. With the part displayed on the **Part** tab, click the **Notes** tab if it's not already displayed.
2. In the **New Note** field, type the note you want to add.
3. Click the save button. 



The screenshot shows the 'Part - Edit' window for a Toyota Camry. The 'Notes' tab is selected, and the 'New Note' field is visible. The 'Notes' section contains a single note: '04/30/2019 - 8:51:13 AM - FRANK Assembly expiration set to 05/29/2019'. The 'New Note' field is empty and contains the text 'New note.'. The save button is located at the bottom right of the 'New Note' field.

Local	Region	Global	Requests	Sales	Avg Days Sold	List Price	Avg Sales	Not in Stock	Lost	Qty	Avg Days QOH
46	406	1418	0	0	0	\$1,476.00	0	0	0	2	1772

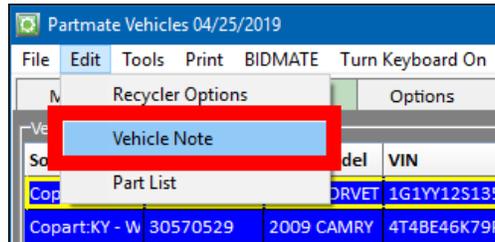
(Partmate) Adding Private Part Notes to AUT Records

In Partmate, there are a variety of ways that notes are added. When vehicles are exported from Partmate to Checkmate, notes are exported as Private Part Notes (on a vehicle's AUT record, or notes on individual parts.)

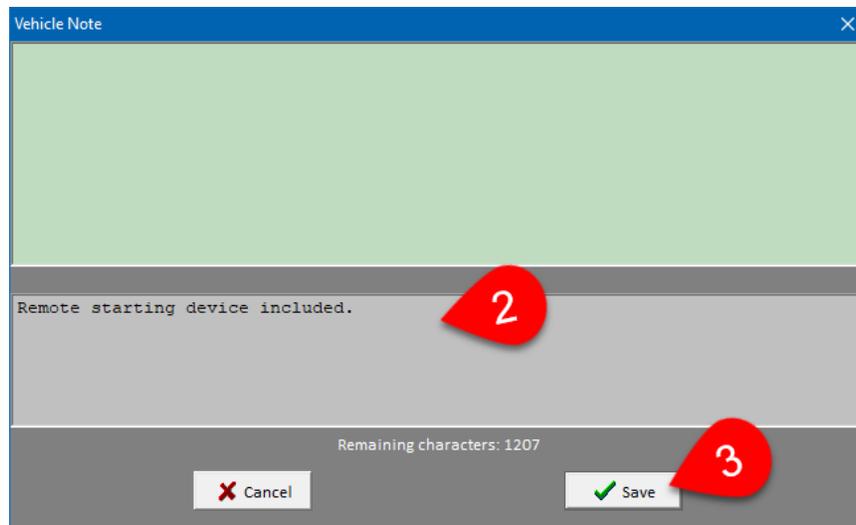
Vehicle Notes

In Partmate you can enter notes about the entire vehicle on the **Vehicle Notes** window.

1. In Partmate, click **Edit>Vehicle Note**.



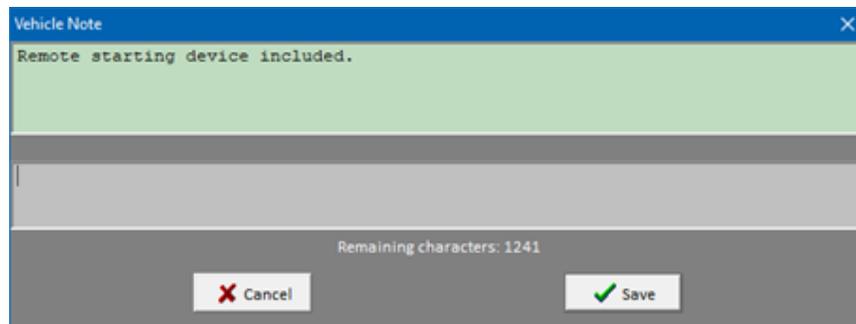
2. The **Vehicle Note** window displays. Type the note in the bottom portion of the window.



Note: If a vehicle was sent to Partmate from Bidmate, and the buyer entered a note in Bidmate, that note will show on this window. You can edit this note until the vehicle is exported to Checkmate for the first time.

3. Click **Save**. When the vehicle is exported to Checkmate, this note is added as a Private Part Note on the vehicle's AUT record.

After the vehicle has been exported to Checkmate, vehicle notes display in the top portion of this window. To add another note, just follow these steps again.



Dismantling Notes

On the **Vehicles** screen, you can enter notes about dismantling the vehicle on the **Notes** tab. This information prints on the Dismantling Instructions report, and it is also added as a Private Part Note on the vehicle's AUT record when you export the vehicle to Checkmate.

Source	Costs	Proj Sales	Notes	Veh Info	Sales Info
Entire Note below is printable. Max 1241 per note to Checkmate.					
PLEASE CHECK THE BLOCK ONCE THE ENGINE IS REMOVED.					

After the vehicle has been exported to Checkmate, a plus sign button appears on the **Notes** tab in Partmate. Click this button to add additional dismantling notes from Partmate. Export the vehicle again to add the additional notes to the vehicle's AUT record in Checkmate.

Source	Costs	Proj Sales	Notes	Veh Info	Sales Info
Entire Note below is printable. Max 1241 per note to Checkmate.					
PLEASE CHECK THE BLOCK ONCE THE ENGINE IS REMOVED.					
Vehicle is in Checkmate. No additional parts or images to export.					

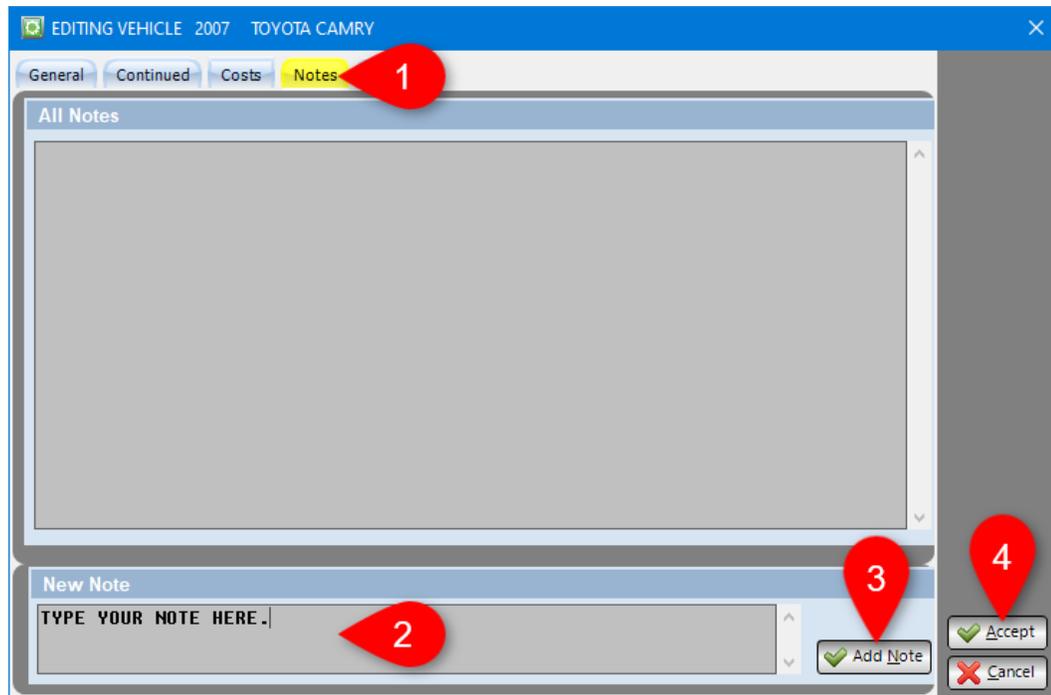
In Checkmate Sales Pro, dismantling notes that were entered on the **Notes** tab in Partmate, display as a Private Part Note. "DISM" indicates that it's a dismantling note.

Description	Private Part Notes
04 May 2022 03:50 PM RACHELB	
Note from AUT	
DISM[PLEASE CHECK THE BLOCK ONCE THE ENGINE IS REMOVED. MAY HAVE	
BROKEN BOLT BOSS.} DISM	

Editing the AUT

After you've exported a vehicle to Checkmate, you can add notes to the AUT while editing the vehicle's AUT record in Partmate.

1. On the **EDITING VEHICLE** window, press the **Notes** tab.
2. In the **New Note** section at the bottom of the window, type the note.



3. Press the **Add Note** button. The note is added to the AUT record. It will display in Checkmate Sales Pro as a Private Part Note.
4. Press **Accept**.

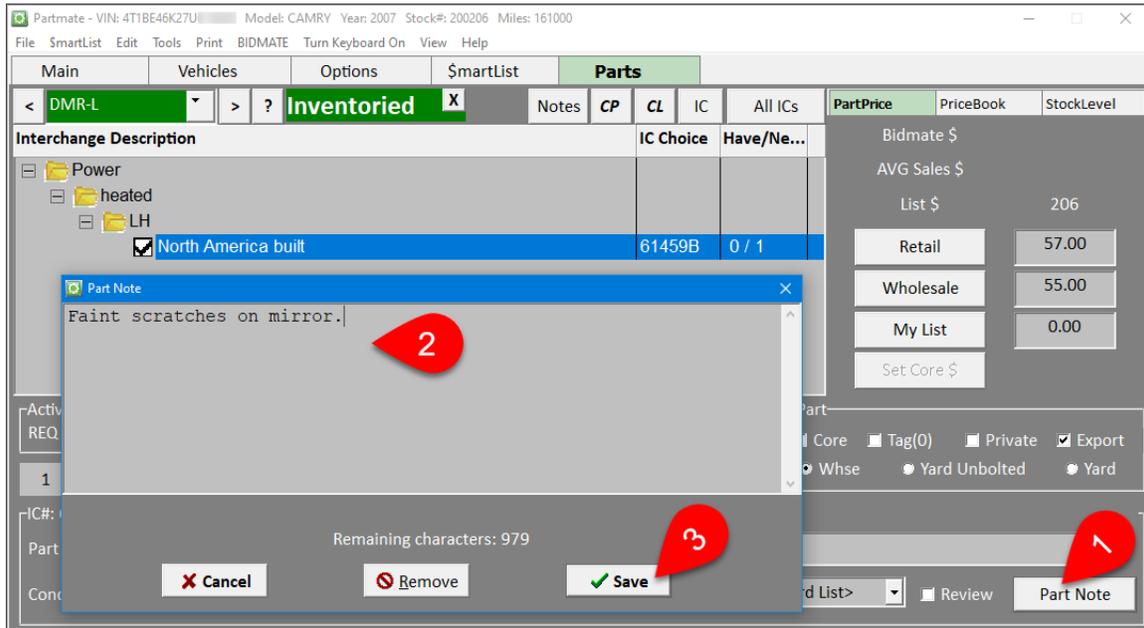
(Partmate) Adding Private Part Notes to Parts

In Partmate, notes can be added to parts in several places.

Parts Tab

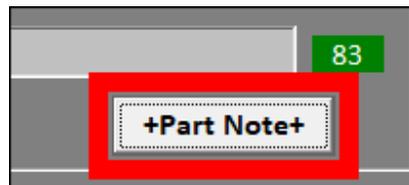
When you're inventorying parts on the **Parts** tab, you can add a note to a part after it's inventoried.

1. With the part you want to add the note to displayed, click the **Part Note** button.
2. The **Part Note** window displays. Type the note.



3. Click **Save**. The note is added to the part.

After the part note is added, the **Part Note** tab displays as **+Part Note+** (plus signs added).



When the vehicle is exported to Checkmate, these notes display as Private Part Notes. "PM" indicates that the note was entered in Partmate.

Description	Private Part Notes
04 Jun 2019 01:39 PM FRANK	
	PM[Faint scratches on mirror:]PM

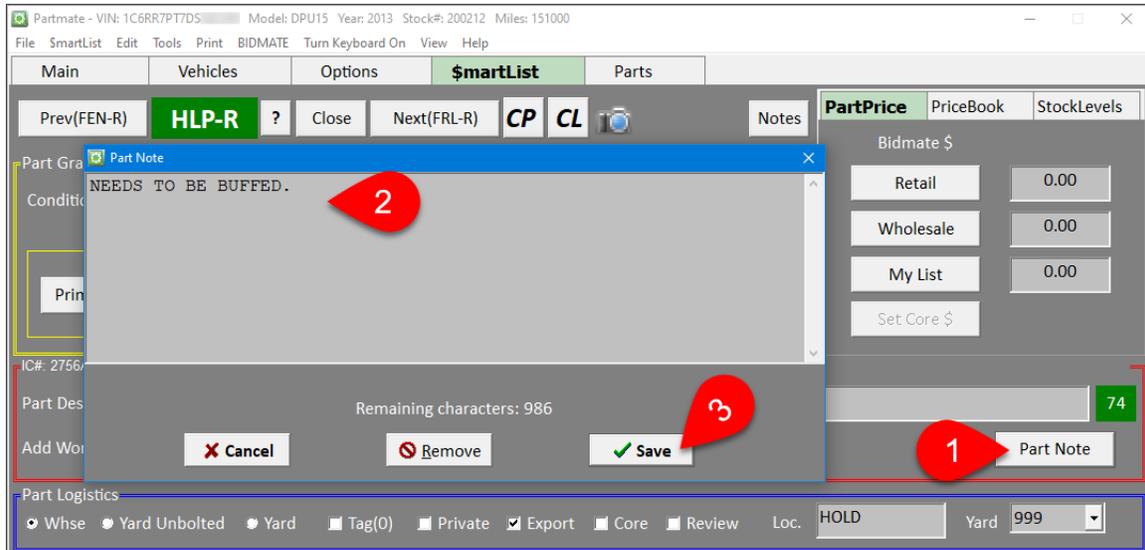
SmartList Tab

When you're inventorying parts on the **SmartList** tab, you can add a note to a part after it's inventoried.

1. When you select an interchange option for a part and press the **Inventory** to inventory the part, the screen changes for you to add information about the part.

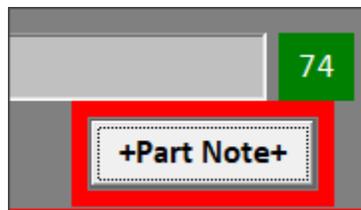
To add a note to the part, press the **Part Note** button.

2. The **Part Note** window displays. Type the note.



3. Press **Save**. The note is added to the part.

After the part note is added, the **Part Note** tab displays as **+Part Note+** (plus signs added).



When the vehicle is exported to Checkmate, these notes display as Private Part Notes. "PM" indicates that the note was entered in Partmate.

Description	Private Part Notes
23 May 2022 12:18 PM RACHELB	
	PM[NEEDS TO BE BUFFED.]PM

Unresolved Note

If you don't know a part's interchange number while you're inventorying in Partmate, you can inventory the part using the option to **Enter with No Interchange & add to Unresolved report**. When you use this option, the ***U* Note:** field appears. Notes entered here will print with the part on the Unresolved Parts report.

Main	Vehicles	Options	SmartList	Parts					
<	ALT	>	? Inventoried	X	Notes	CP	CL	IC	All ICs
Interchange Description							IC Choice	Have/N...	
<input checked="" type="checkbox"/> Enter with No Interchange & add to Unresolved report							*U*		
U Note:									
203 NOT SURE WHICH IC - PLEASE INCLUDE DURING DISMANTLE									

When you export this vehicle to Checkmate, *U* notes display in Checkmate Sales Pro as Private Part Notes. "Unresolved Note" indicates that it's a *U* note.

Description	Private Part Notes
18 May 2022 05:41 PM RACHELB	
+	PM[Unresolved Note: NOT SURE WHICH IC - PLEASE INCLUDE DURING DISMANTLE
+	JPM

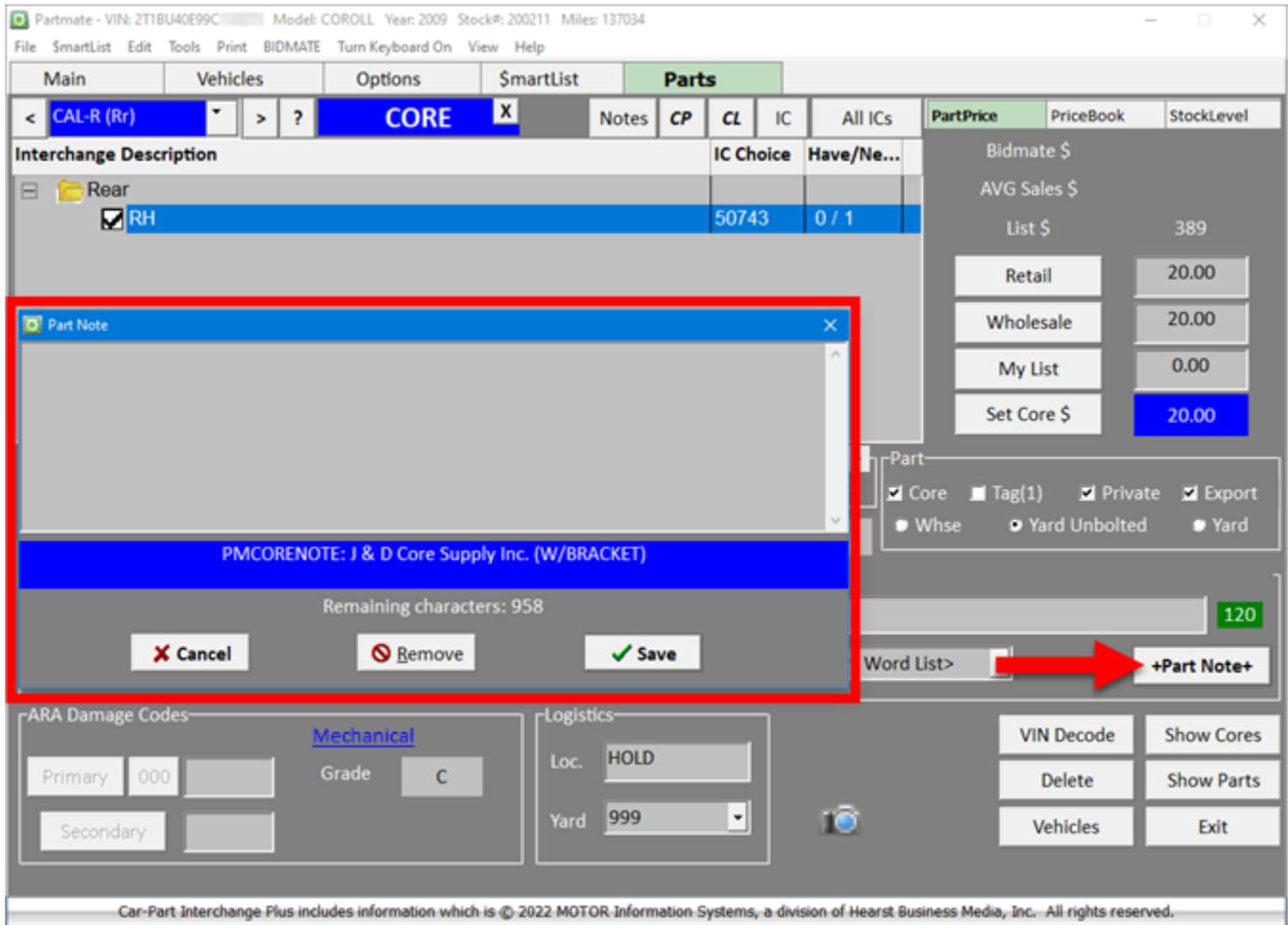
Assembly Expiration Date

When you inventory an assembly and it's exported to Checkmate, the expiration date for the assembly is automatically added as a Private Part Note on the main assembly part.

Description	Private Part Notes
18 May 2022 05:41 PM RACHELB	
+	Assembly expiration set to 08/16/2022
+	

Core Buyer Information

If you subscribe to Car-Part.com Demand Data, you can view core buyer information in Partmate. Additionally, when you mark a part as a core, the amount of the highest current core offer is applied to the part and the core buyer's information is automatically added to the part as a part note.



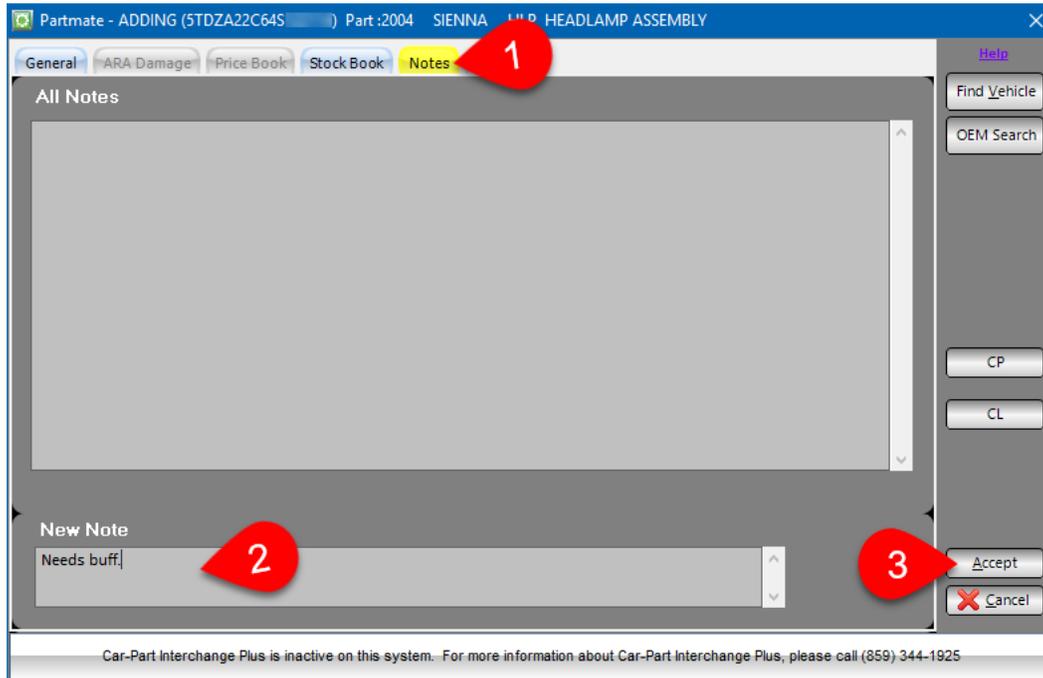
When the vehicle is exported to Checkmate, this note displays as a Private Part Note. "PMCORENOTE" indicates that it's a core note from Partmate.

Description	Private Part Notes
18 May 2022 06:41 PM RACHELB	
PM[PMCORENOTE: J & D Core Supply Inc. (W/BRACKET)]	
JPM	

Adding Loose Parts

When you're adding a loose part to your inventory in Partmate, you can add a Private Part Note to the part.

1. On the **ADDING Part** window, click the **Notes** tab.
2. In the **New Note** section at the bottom of the window, type the note.

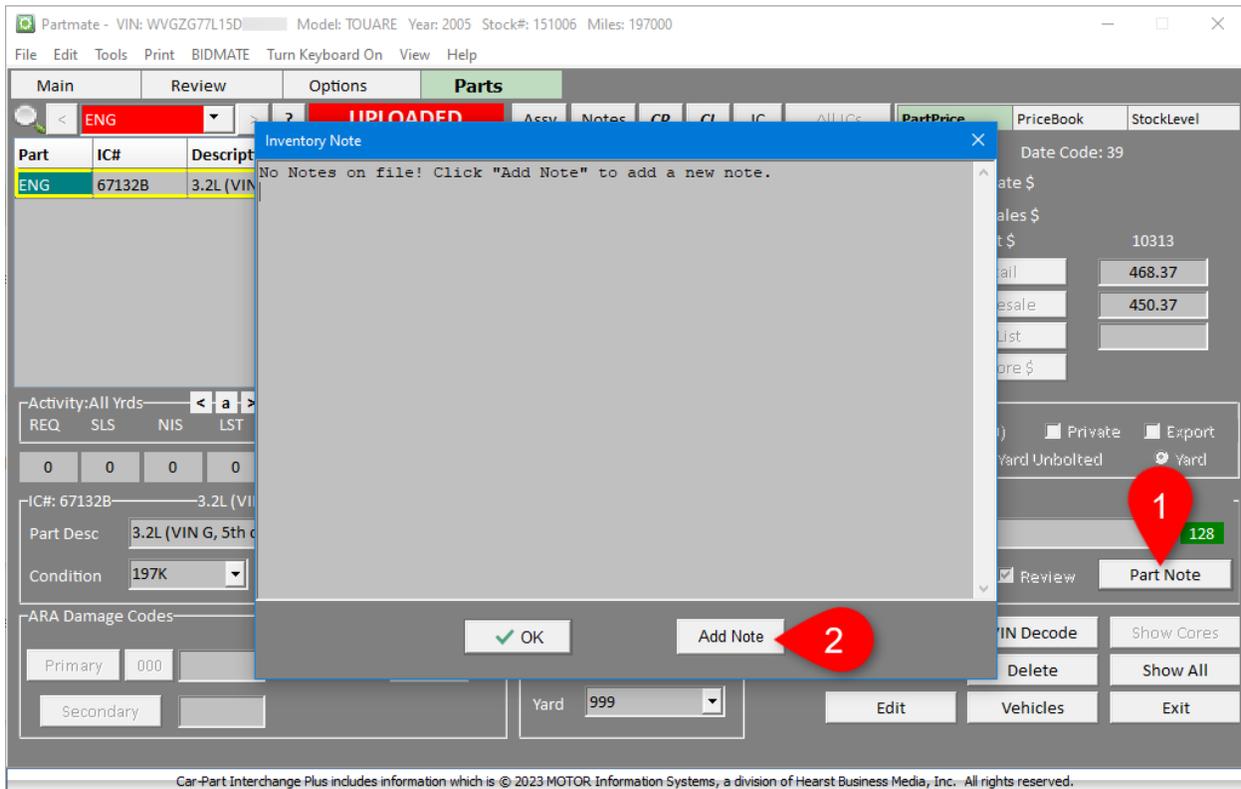


3. When you've finished entering part information on this window, click the **Accept** button. The part is added to your inventory with the Private Part Note that you entered.

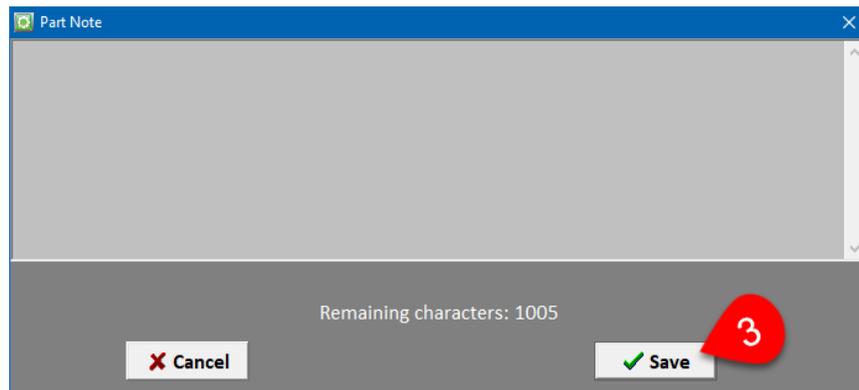
Partmate Review

In Partmate Review, notes can be added to parts in a way similar to regular Partmate:

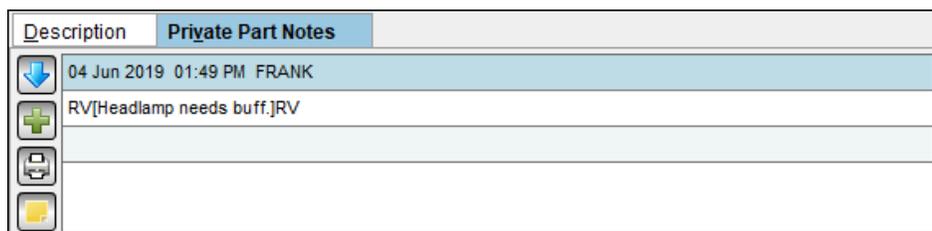
1. On the **Parts** screen, press the **Part Note** button.
2. Press **Add Note** to add a new note.



3. The **Part Note** window displays. Type the note, and then press **Save**.



The note is added to the part. It displays as a Private Part Note in Checkmate. "RV" indicates that the note was entered in Partmate Review.



(Photomate) Adding Private Part Notes

The Photomate mobile app is fully integrated with Checkmate and lets you perform essential inventory management functions, right from your mobile device. In certain cases, notes are added to parts as you're working in Photomate.

Note: When a Private Part Note is added to a part in Photomate (or Checkmate), a copy of the note is also placed on the AUT record of the vehicle the part is from. (So you'll still have a record of the note even after the part is deleted from your inventory.)

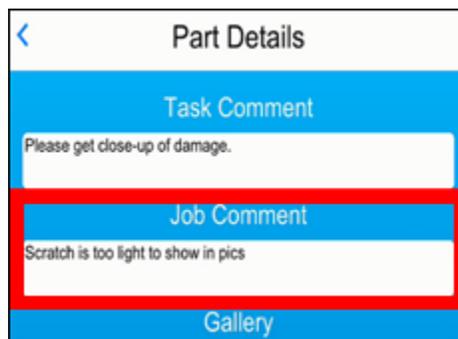
Move a Part

When you use Photomate's **Move a Part** function to relocate a part, a Private Part Note is automatically added to the part. The note shows the location the part was moved from, and the location it was moved to.

Description	Private Part Notes
	31 Aug 2021 08:54 AM JASONJ
	Location move - to 9A040A on 08/31/2021 by JASONJ
	
	

Add Image to a Part – Job Comment

When you use Photomate to add images to a part, you can enter a Job Comment about the part or any issues you encounter while taking photos.



Part Details

Task Comment

Please get close-up of damage.

Job Comment

Scratch is too light to show in pics

Gallery

In your Photomate **Imaging** settings, you can designate whether you want Private Part Notes to be automatically generated from Job Comments.



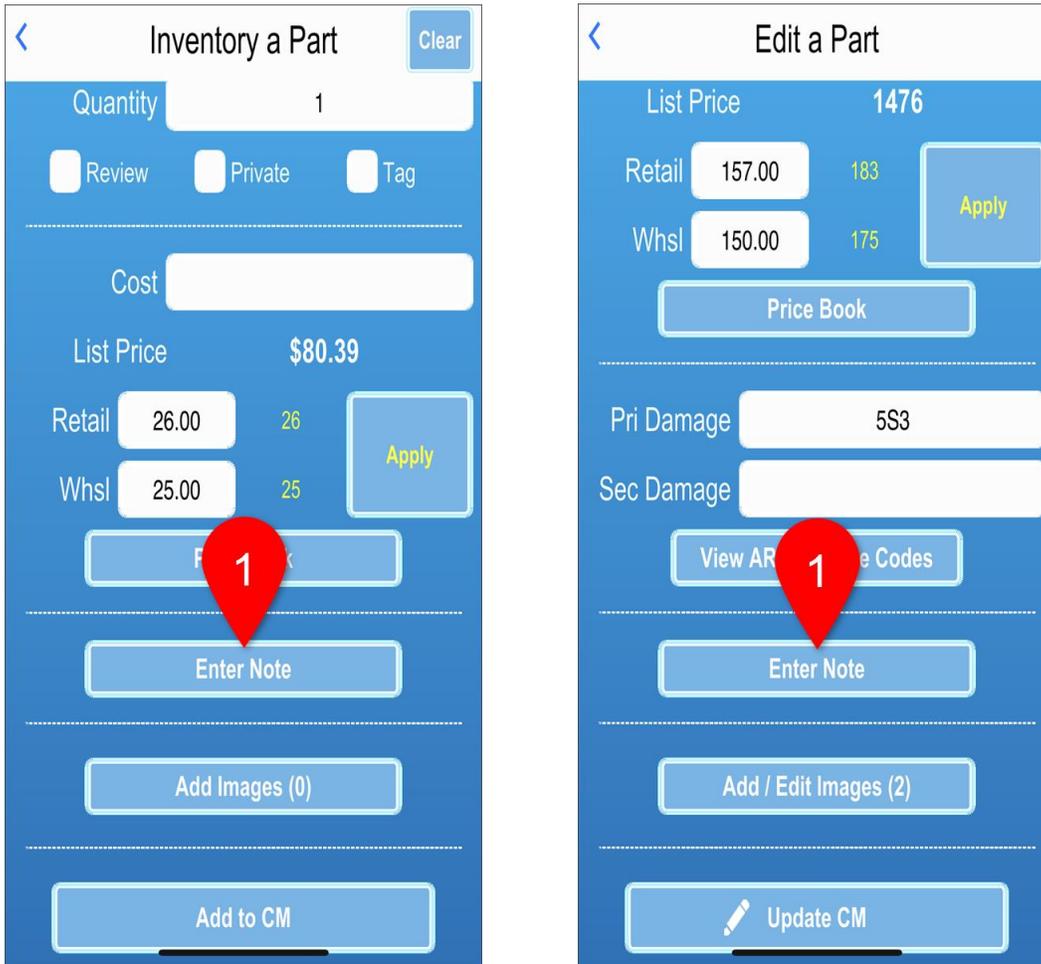
If this setting is checked, any Job Comments you enter in Photomate will be added to the part as a Private Part Note when you submit photos and other changes to Checkmate.

Description	Private Part Notes
 06 Mar 2019 11:26 AM FRANK	
 Photomate Job Comment : Scratch is too light to show in pics	
	
	

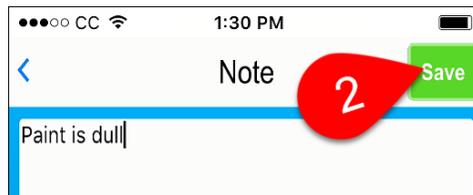
Inventory or Edit a Part

When you add a part to your inventory or edit a part in your inventory using Photomate, you can add a note to the part, just as you can when inventorying a part in Partmate or Checkmate.

1. At the bottom of the **Inventory a Part** or **Edit a Part** screen, tap the **Enter Note** or **Edit Note** button.



2. On the **Note** screen, type the note and then tap the **Save** button to save the note and return to the **Inventory a Part** or **Edit a Part** screen.



When you upload the part to Checkmate, your inventory is updated with this note saved as a Private Part Note on the part.

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!

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

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