Checkmate Accounting New Features: 2023R1

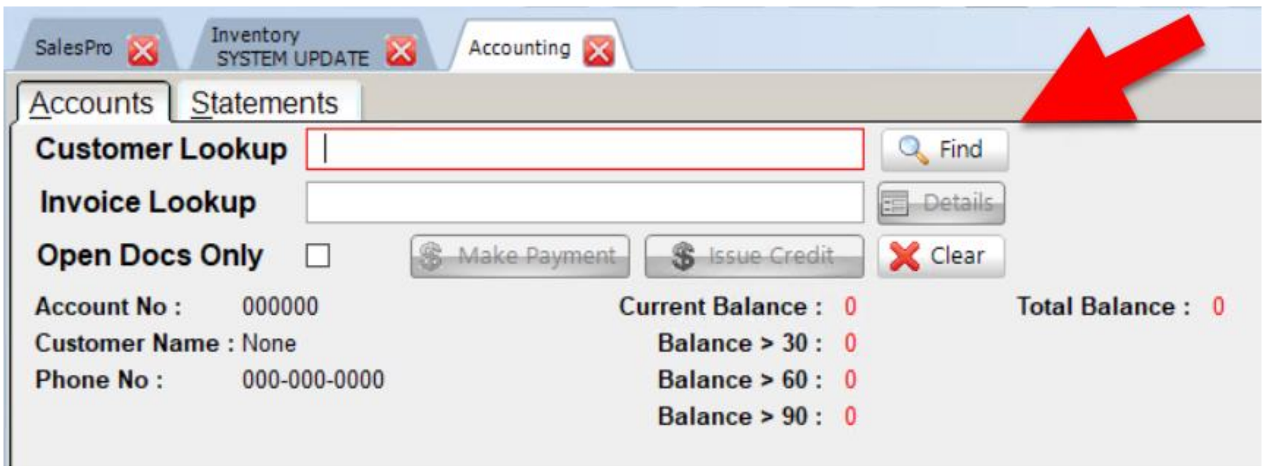
This Checkmate build introduces the ability to save a customer email address specifically for statements. This build also introduces the ability to send receipts via email for back office payments.

Setting a Statement Email Address

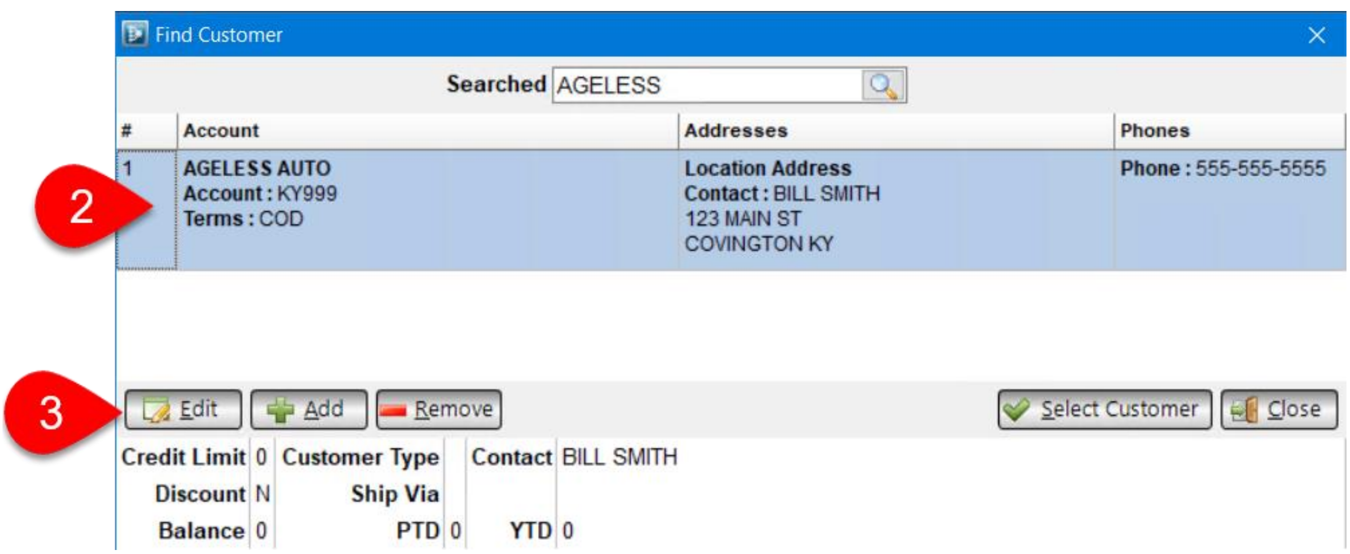
This update to Checkmate enables you to set a Statement Email Address for each customer—an email address specifically for their statements. With this addition, you can maintain both a contact email for each customer, as well as a separate email for statements.

To set a Statement Email Address for a customer, follow these steps:

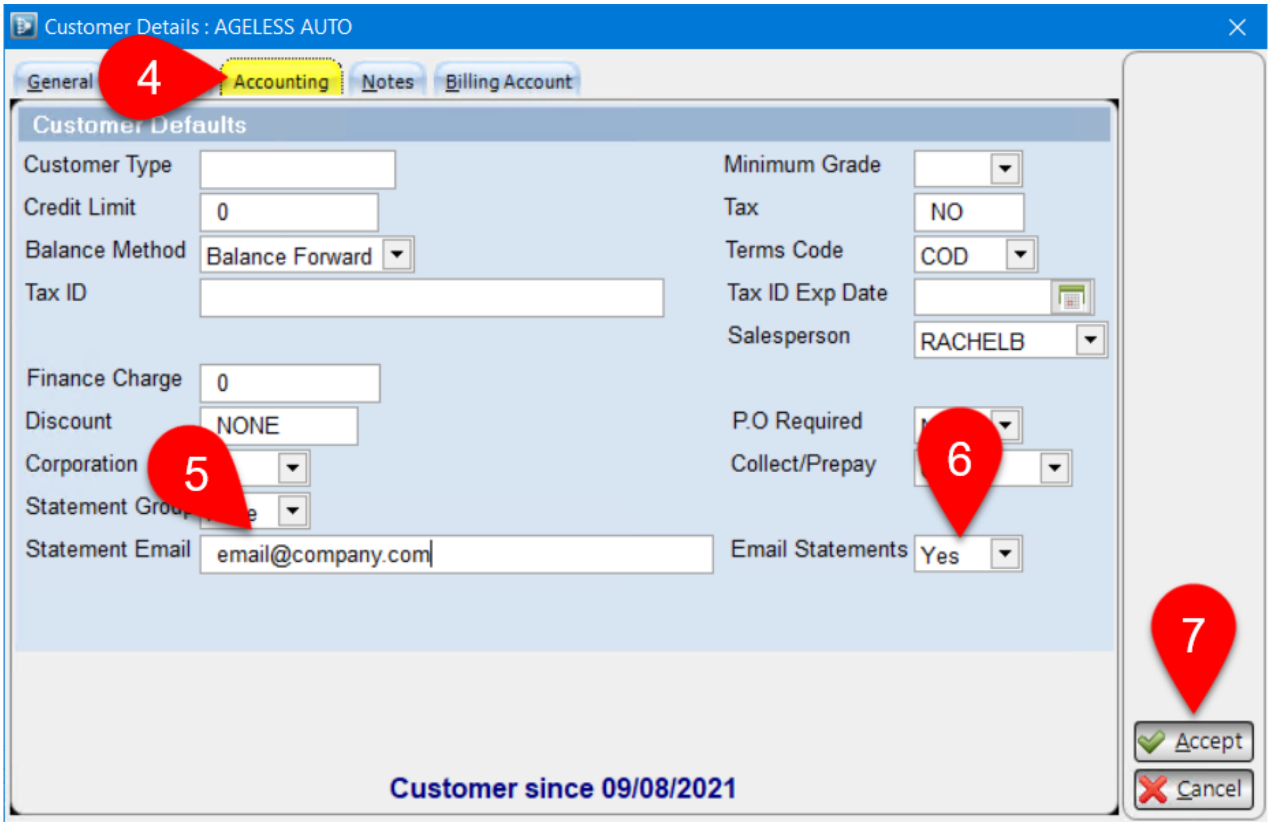
1. In the Accounting tool, type in the customer name and click the **Find** button.



2. The **Find Customer** window opens. Select the customer.
3. Click **Edit**.



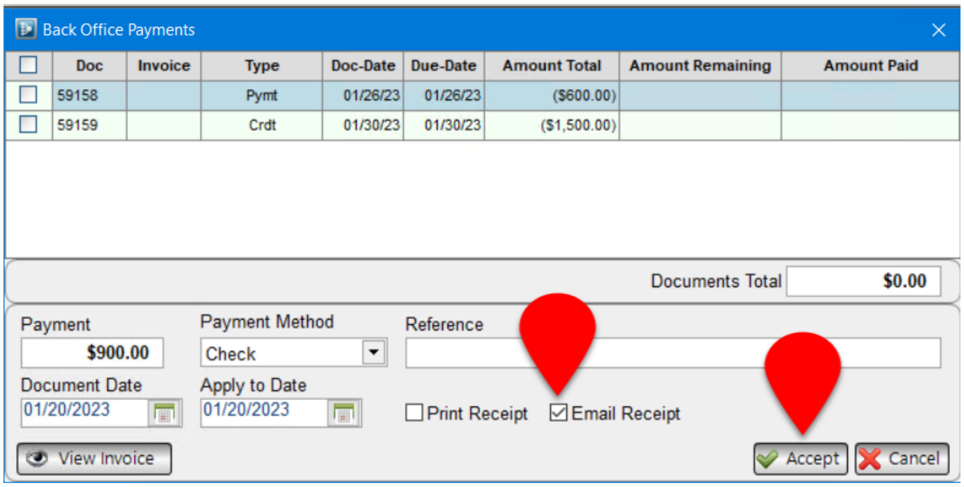
4. The **Customer Details** window opens. Click the **Accounting** tab.
5. In the **Statement Email** field, enter the email address the customer wants to use for statements (if no email address is entered in this field, statements will instead be sent to the email address in the customer's **Contact Info**, which you can see on the **General** tab of the **Customer Details** window.
6. Be sure the **Email Statements** toggle is set to **Yes** to have this customer default to email statements.
7. Click **Accept** to save the email address.



Email Receipts for Back Office Payments

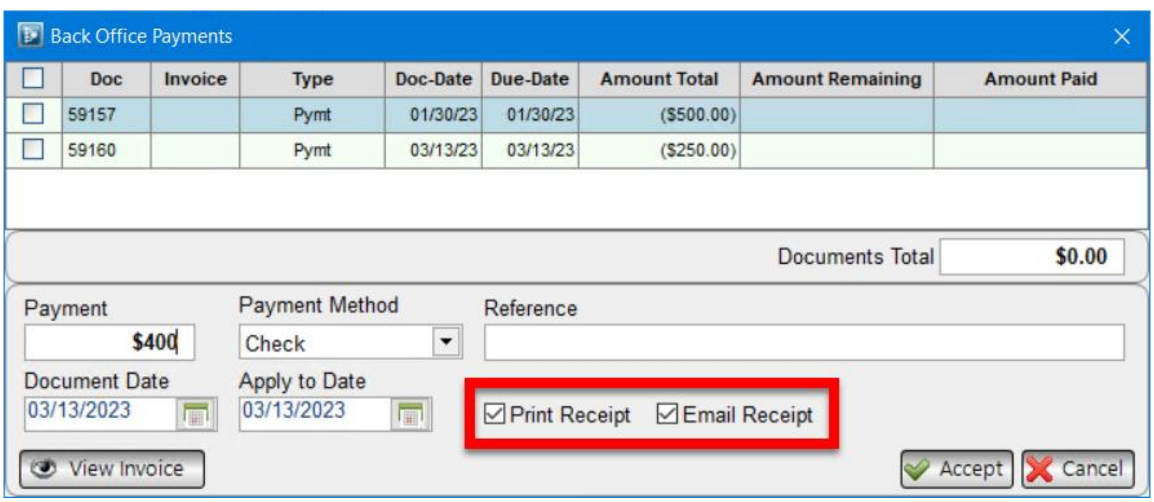
This release introduces the ability to send email receipts to customers for back office payments (payments processed manually in Checkmate).

To send a customer an email receipt, in the **Back Office Payments** window, simply check the box for **Email Receipt**. With this box checked, when you click **Accept**, the customer will receive an email receipt for the payment.



Receipt Memory for Back Office Payments

When you make back office payments (payments processed manually in Checkmate), Checkmate will now remember which receipt type (i.e., **Print** or **Email**) you selected last. The next time you open the **Back Office Payments** window, the boxes for the last selection will already be checked.



Note: Checkmate remembers which options you selected the last time you used the **Back Office Payments** window, *not* which options you last selected for the specific customer.

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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