Checkmate Inventory Pro New Features: 2023R1

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Overview

information.

In this release, the most impactful enhancements to Inventory Pro deal with part grading—including new standards for grading different part types, and new audits for detecting inconsistencies in your inventory data. These part grading enhancements are covered in another guide: Part Grading Improvements and New Features: Checkmate, Partmate, and Photomate.

This guide covers the enhancements to Inventory Pro that *do not* concern part grading. These additional enhancement make it faster and easier to update discontinued parts and models and make restocking easier with a dedicated RESTOCK View. This build also introduces enhancements which provide you with easy access to useful info while managing your inventory.

Updating Discontinued Parts and Models

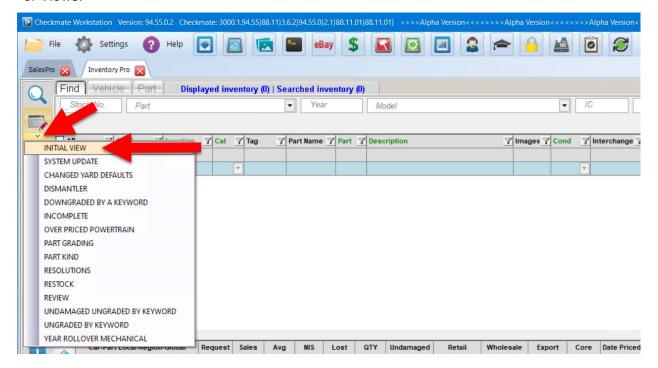
This release makes it quicker and easier to find and update parts in your inventory that have discontinued part codes, or discontinued model names. In most cases, when a part or model is discontinued, Checkmate automatically updates parts accordingly (including reassigning interchange) when a VIN is available, *but* there are cases where Checkmate cannot update the part code or model automatically. They must be updated manually, and then interchange must be assigned under the new part code or model. We recommend you search for discontinued models/parts as the first step when reviewing Resolution parts.

The steps below explain how to search for parts with discontinued codes or models and update the

Finding Parts with Discontinued Models

To find parts with discontinued model names:

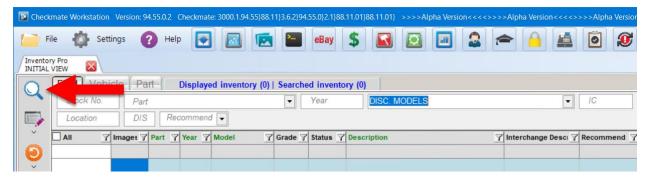
1. Start in Inventory Pro. We recommend that you use the INITIAL VIEW for this workflow. If you are not in the INITIAL VIEW, simply click the Select View drop-down, and choose **INITIAL VIEW** from the list of Views.



2. Once the INITIAL VIEW is displaying, type "DISC. Models" in the **Model** search field.



3. Click the magnifying glass icon to search.



4. Your search results appear, displaying only parts with discontinued model names.

If you don't have any parts in your search results, that means you don't have parts with discontinued models in your inventory.

Updating Parts with Discontinued Model Names

To help you update parts with discontinued model names, the **Disc Model Note** column has been added. To turn this column on:

- 1. Right-click on any column header. The **Columns** window opens, displaying a list of available columns.
- 2. Find the **Disc Model Note** option and check the box to turn it on.
- 3. Click Close.

Refer to the **Disc Model Note** column for help determining the updated part code. Then, to update an individual part, double-click the part line in the **Model** column, and enter the updated model name.

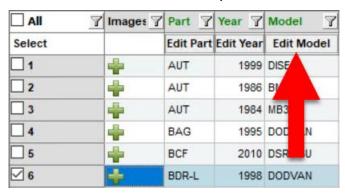


To bulk edit multiple parts with the same discontinued model name:

1. Look to the **Stock** column to verify that each part comes from the same vehicle. Check the box for each part in the **Select** column.



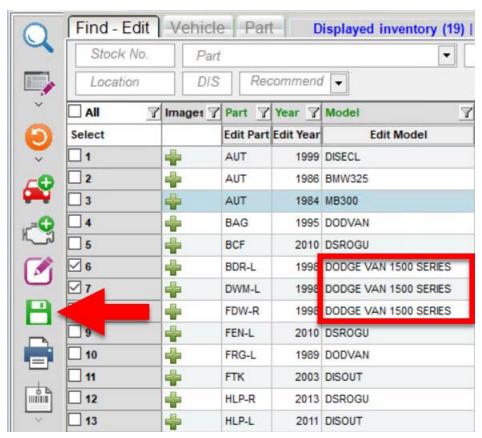
2. Click Edit Model in the Model column to bulk edit the parts.



3. In the window that appears, enter the updated model name, and click **Accept**.



4. The updated model name displays in the **Model** column for each part. Click the Save icon to make the changes permanent.

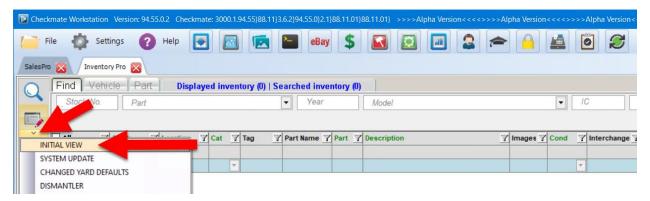


5. Now that the models are updated, you can assign interchange to the parts, using the RESOLUTIONS View. For more information, please see the How to Review Resolution Parts guide.

Finding Parts with Discontinued Part Codes

To find parts with discontinued part codes:

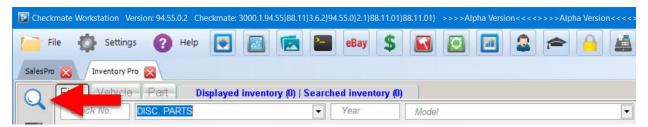
Start in Inventory Pro. We recommend that you use the INITIAL VIEW for this workflow. If you are not
in the INITIAL VIEW, simply click the Select View drop-down, and choose INITIAL VIEW from the list
of Views.



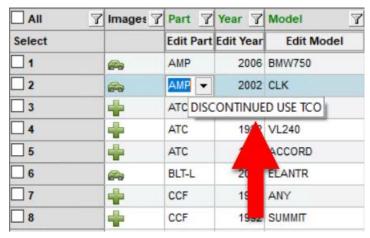
2. Once the INITIAL VIEW is displaying, type "DISC. PARTS" in the **Part** search field.



3. Click the magnifying glass icon to search.



4. Your search results appear, displaying only parts with discontinued part codes. These discontinued codes display in the **Part** column. In this column, hover your mouse over any part line to see the updated part code.

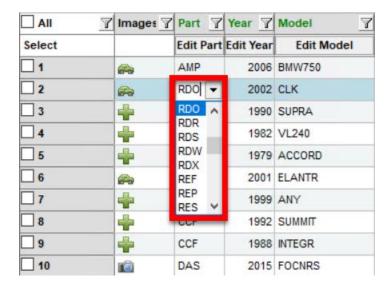


Updating Parts with Discontinued Codes

To help you update parts with discontinued part codes, the **Disc Part Note** column has been added. To turn this column on:

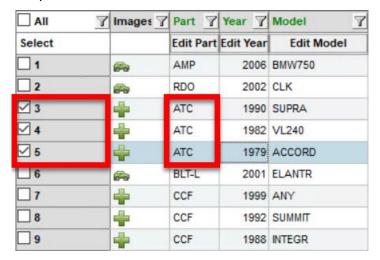
- 1. Right-click on any column header. The **Columns** window opens, displaying a list of available columns.
- 2. Find the **Disc Part Note** option and check the box to turn it on.
- 3. Click Close.

Refer to the **Disc Part Note** column for help determining the updated part code. Then, to update an individual part, double-click the part line in the **Part** column, and enter the updated code.



To bulk edit multiple parts with the same discontinued part code:

1. Check the box for each part with the code in the **Select** column to select each one.



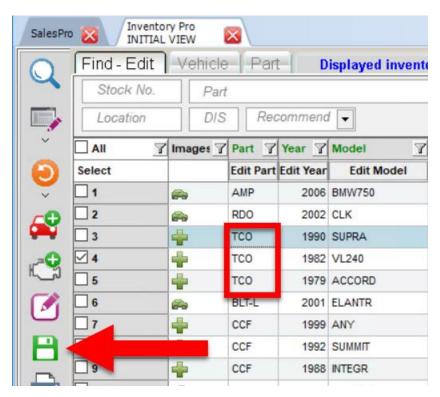
2. Click Edit Part in the Part column to bulk edit the parts.



3. In the window that appears, enter the updated code, and click **Accept**.



4. The updated part code displays in the **Part** column for each part. Click the Save icon to make the changes permanent.

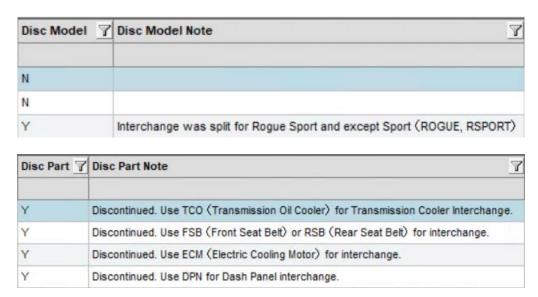


5. Now that the codes are updated, you can assign interchange to the parts, using the RESOLUTIONS View. For more information, please see the <u>How to Review Resolution Parts</u> guide.

Disc Part Note and Disc Model Note Information Columns

As mentioned in the steps above, there are now 2 new columns in Inventory Pro that help you identify and update discontinued parts and models.

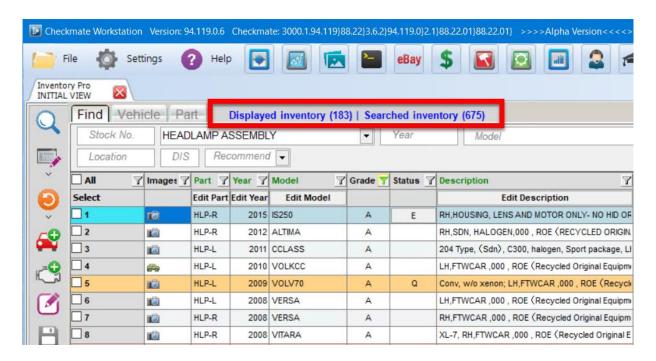
The **Disc Part** and **Disc Model** columns show either **Y** for Yes (as in "Yes, this discontinued") or **N** for No (as in "No, this is not discontinued." The **Disc Part Note** and **Disc Model Note** columns provide info for updating the model name or part type.



Displayed and Searched Inventory

This release introduces feature in Inventory Pro that shows how many parts are currently displayed in your search results, and the total number of parts in the searched inventory.

- **Displayed Inventory** is the number of parts currently showing in your search results. This includes all parts that meet your search criteria *minus* any parts that have been filtered out using the information columns.
- **Searched Inventory** is the total number of parts that meet your search criteria. Using filters in the information columns will not affect your **Searched Inventory**.



For example, let's say you searched your inventory for headlamp assemblies. Your search results initially included 675 parts, so your **Displayed Inventory** and your **Searched Inventory** would initially both display 675. If you then filtered your results to only show A grade parts (using the filter on the **Grade** column), the **Displayed Inventory** would become a lower number. If you have 183 A grade headlamp assemblies, then the **Displayed Inventory** would display 183, and the **Searched Inventory** would display 675 (the total original search results).

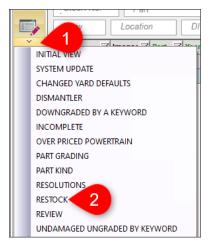
Restock Parts in Inventory Pro with the RESTOCK View

In Inventory Pro, Views set the configuration of the search fields and information columns on the **Find** tab and may also populate search criteria for you.

The new RESTOCK View is designed to help you restock parts (which replaces the **Restocking** function in Checkmate Retro). With the RESTOCK View you can quickly search for parts that have a **Location** of **RESTCK** and then restock those parts.

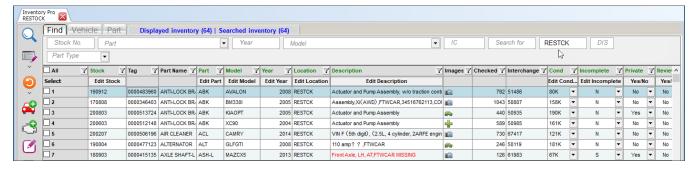
Here's how it works:

- 1. On the **Find** tab, click the down arrow on the select View button.
- 2. Select RESTOCK.



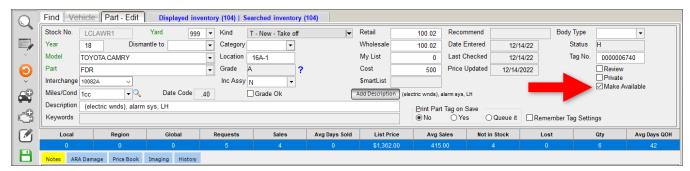
The search fields and information columns are rearranged according to the View, and the **Location** search field is populated with **RESTCK**. (It may take several seconds to load.)

- 3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
- 4. Click the magnifying glass button \(\textstyle \) to search your inventory according to the search fields. Your search results display parts that need to be restocked.

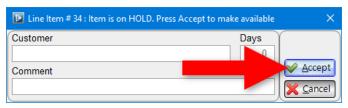


Choose a part to work with. Click inside the Location field and type the new location.

- 6. (Optional) If the part is on hold (has a status of **H**) and you want to make it available for sale again:
 - a. Click to select the part, and click the edit button open the part for editing. (If you've already made changes to other parts on the **Find** tab, you may be prompted to save your changes.)
 - b. On the Part Edit screen, click the Make Available checkbox.



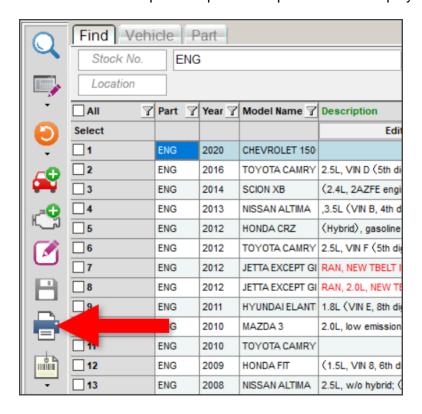
c. A window displays saying the item is on hold. Click **Accept** to remove the part from being on hold and make the part available for sale.



- d. Click the save button 🗎 to return to the **Find** tab.
- 7. Repeat steps 5 & 6 for each part you want to restock.
- 8. When you're finished restocking parts, click the save button.

Printing Parts on the Find Tab

On the **Find** tab in Inventory Pro, the printer button has been updated. Previously, it printed a snapshot of your screen. Now, you can click this button to print a report of the parts that are displayed on the tab.



Graded Date/Time Column

This release to Checkmate introduces the **Graded Date / Time** column, which shows the date and time that a part was last graded.

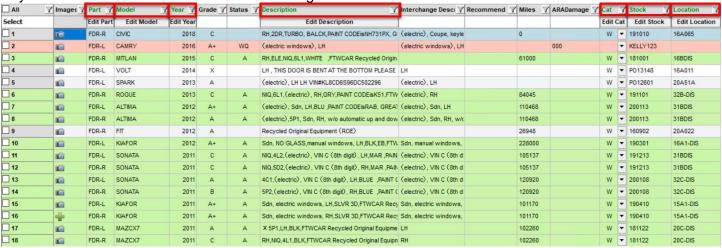


Bulk Editing Added to More Information Columns

In this release, we've added the ability to bulk edit the following information columns in Inventory Pro:

- Dismantle to
- Grade OK
- Kind
- Incomplete Assembly
- Model
- My List
- Part
- Year

Any column that can be bulk edited will have a green column header.



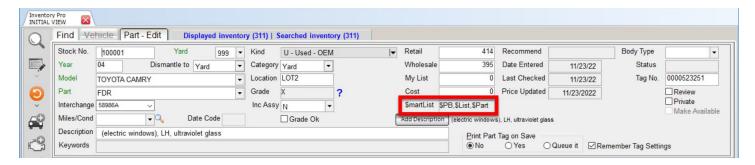
Bid Amount Field Auto-Calculates

When you're adding or editing a vehicle in Inventory Pro, the **Bid Amount** field now adjusts in real-time. Checkmate will automatically set the value in this field to be the value in the **Total Cost** field, minus any fees entered in the other fields.



\$martList Field in Add/Edit Window

If a part with one or more \$martList recommendations was inventoried through Partmate, you can now see the recommendation(s) when editing the part in Inventory Pro, in the **\$martList** field.



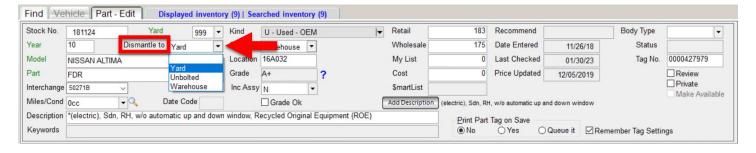
Dismantle to Field/Column and the Dismantling Instructions Report

The new **Dismantle To** field is only relevant if you use Checkmate Report's **Dismantling Instructions Report.** Checkmate uses this information to populate that report. (For more information, please see our guide **Checkmate Reporting New Features: 2023R1**.)

For parts you've inventoried from vehicles you have not yet dismantled, Inventory Pro's **Part-Edit** screen now has a field to indicate which Category (**Yard**, **Unbolted**, or **Warehouse**) you intend to assign to the part after dismantling the vehicle. This is the **Dismantle to** field.

If the vehicle was inventoried in Partmate, this field shows the intended category that was designated for the part in Partmate.

You can edit the **Dismantle to** field if the vehicle has not been dismantled yet and you want to change the category for the part that prints on Checkmate Report's **Dismantling Instructions Report**.



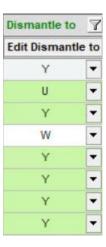
Mote:

After the vehicle is dismantled, update the **Category** and **Location** fields for the dismantled parts, like you normally would.

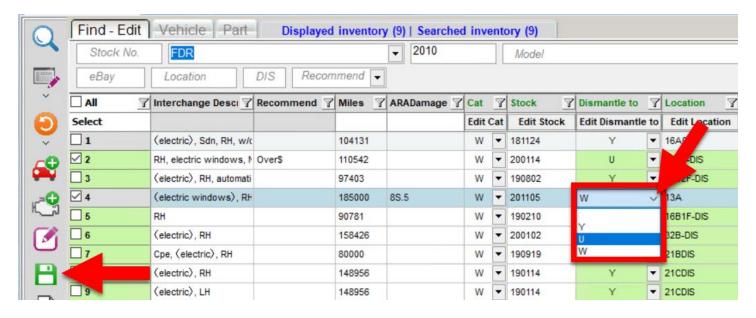
Dismantle to Column

You can also view and edit a part's **Dismantle to** information in a new information column in Inventory Pro on the **Find** tab.

- Y Yard
- U Unbolted
- W Warehouse



Click the drop-down for part to in this column to change a parts' **Dismantle to** information. Then click the save icon to make the changes permanent.

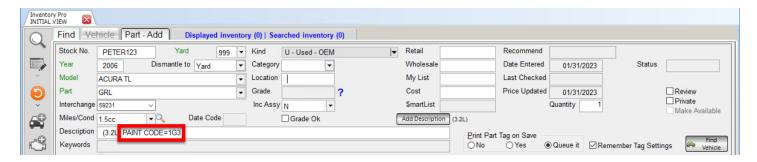


Paint Codes in Part Descriptions

Car-Part.com scans part descriptions for damage codes, in order to verify a part's grade. Sometimes, there are paint codes that could be confused with damage codes (e.g., on a 2020 Toyota 4-Runner hood, "1G3" code could mean that the color is Magnetic Metallic Gray, or it could mean that the part has 3 units of damage).

Soon, Car-Part.com will be updated to include a work-around, so that you will be able to include paint codes in your descriptions in a way that they will not be confused with damage codes.

That work-around is: in your description, include "Paint Code=" before the code (e.g., "Paint Code=1G3"). Car-Part.com will recognize that this is not an ARA damage code. We suggest that you begin implementing this strategy in your descriptions now.

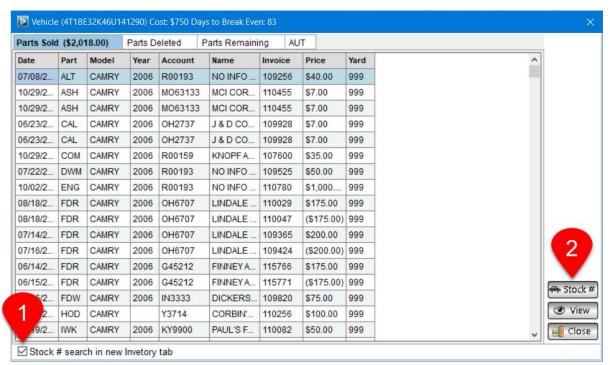


Stock # Searches in a New Inventory Pro Tab

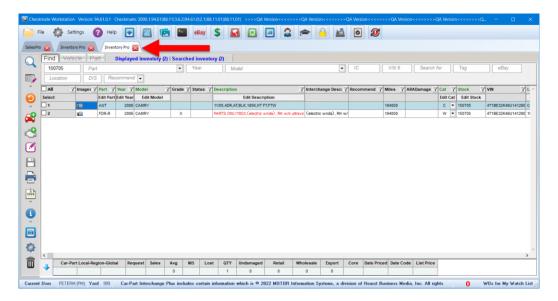
When running a **Stock #** search in Inventory Pro's **Vehicle History** window, you now have the option to launch the search in a new Inventory Pro tab. When the search is launched in a new Inventory Pro tab, your previous search results (and any edits to the results) on your previous Inventory Pro are unaffected, so you won't lose any work.

From the **Vehicle History** window:

- 1. Check the box for **Stock # search in new Inventory tab**.
- Click the Stock # button.

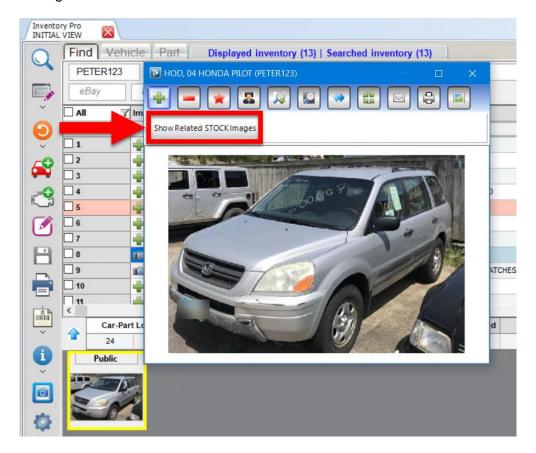


A new Inventory Pro tab appears, displaying your inventoried parts for the stock number.



Show Related STOCK Images Button Added to Inventory Pro

When viewing images in Inventory Pro, the **Show Related STOCK Images** button is now available. Click it to view any available images associated with the AUT or the rest of the vehicle.



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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