Checkmate Inventory Pro

User Guide

Car-Part.com

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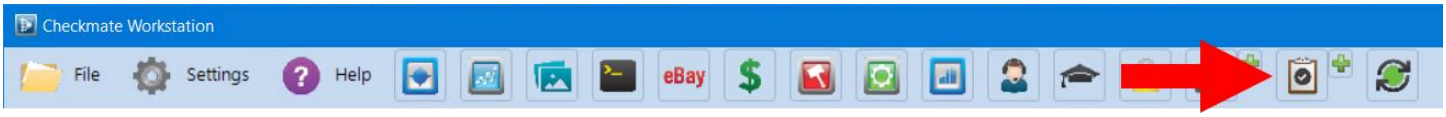
Overview

Inventory Pro is Checkmate's "command central" for inventory management. With this tool you can easily:

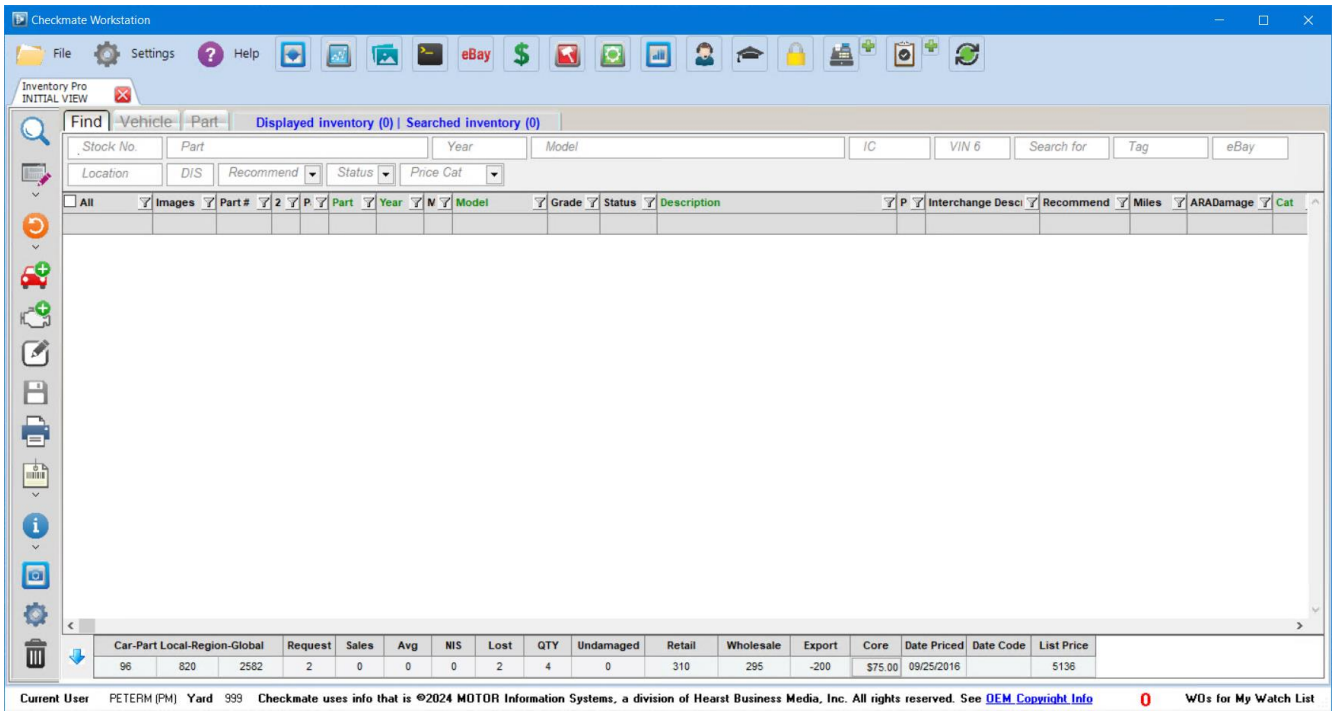
- Add and edit vehicles and parts
- Search for inventory to review and edit using detailed criteria
- Identify and review inconsistent or missing part information that needs your attention
- Research pricing with one-key access to CrashLink and Trading Partners
- Perform edits on multiple parts at one 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 Inventory Pro

In Checkmate Workstation, in the toolbar at the top of the window, click the clipboard button to open Inventory Pro. (If you already have Inventory Pro open, you can click the plus sign button to open an additional tab.)



The **Inventory Pro** tab opens.



⚠ **Note:** You can configure the number of Inventory Pro tabs that 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.

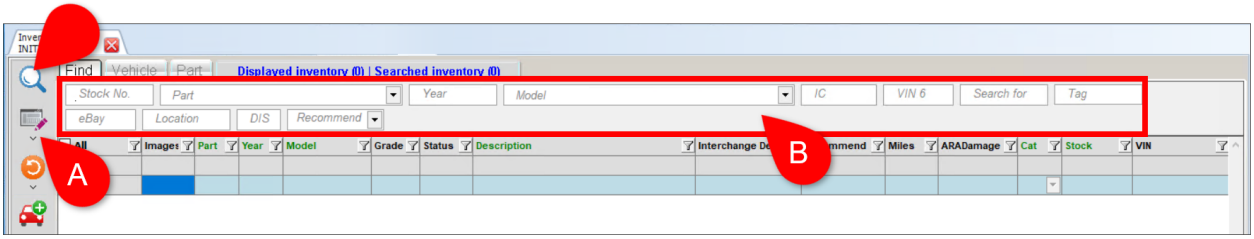
There are several ways to get started:

- **Search for inventory to review or edit**. You can do just one or both of the following**:**

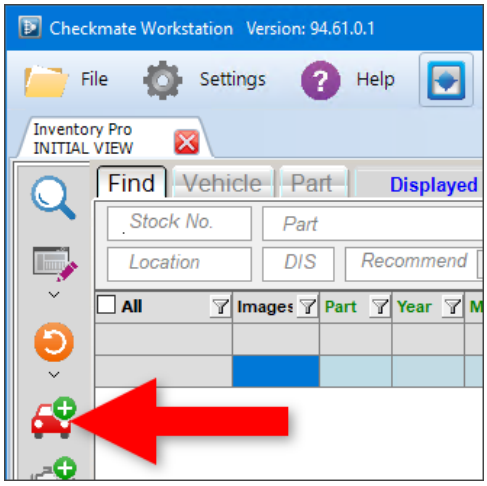
  A. Select a View appropriate for the task at hand. Views will arrange the search fields and information columns according to how that View is set. Click the down arrow on the select view icon ( ) and choose an option. For more info, refer to the section of this guide called: **Selecting a View – Find Tab**

  B. Search for parts or vehicles to work on, by using the fields at the top of the screen. For more info, refer to the section of this guide called: **Searching for Inventory – Find Tab**.

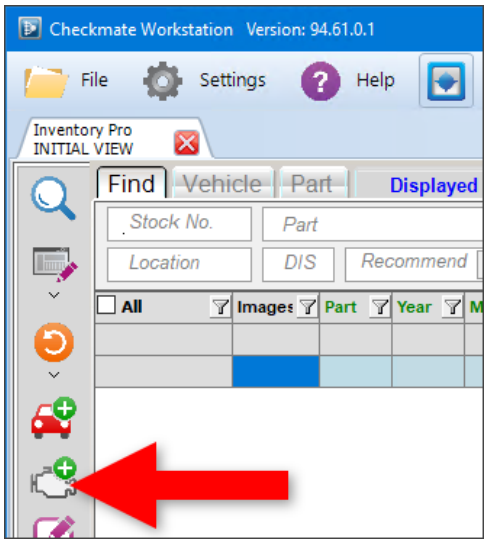
  Then, click the magnifying glass to search according to your search parameters.



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

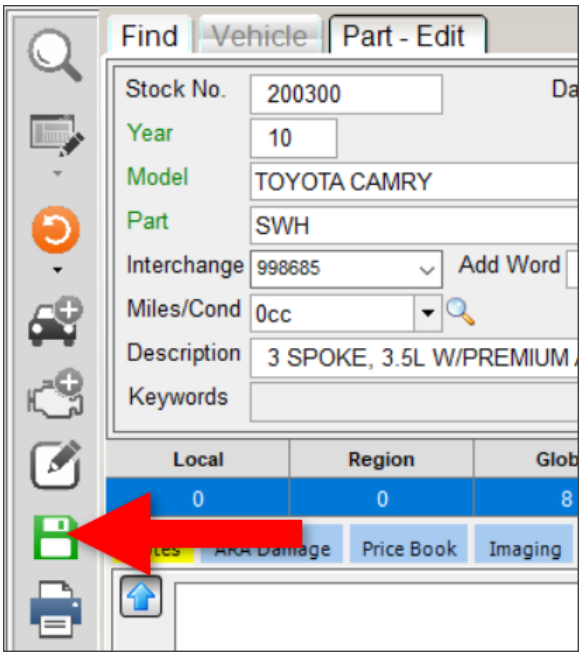


- **Add a part**
  Click the add part button to add a loose part to your inventory. For more info about this, refer to the section of this guide called: **Adding a Part**.

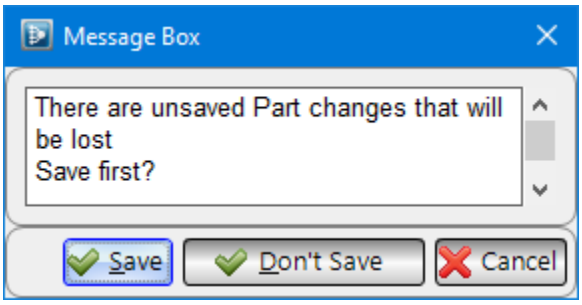


Saving Your Changes

While you're working in Inventory Pro, any changes you make to parts or vehicles are not permanent until you click the save button.



Throughout Inventory Pro, 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:

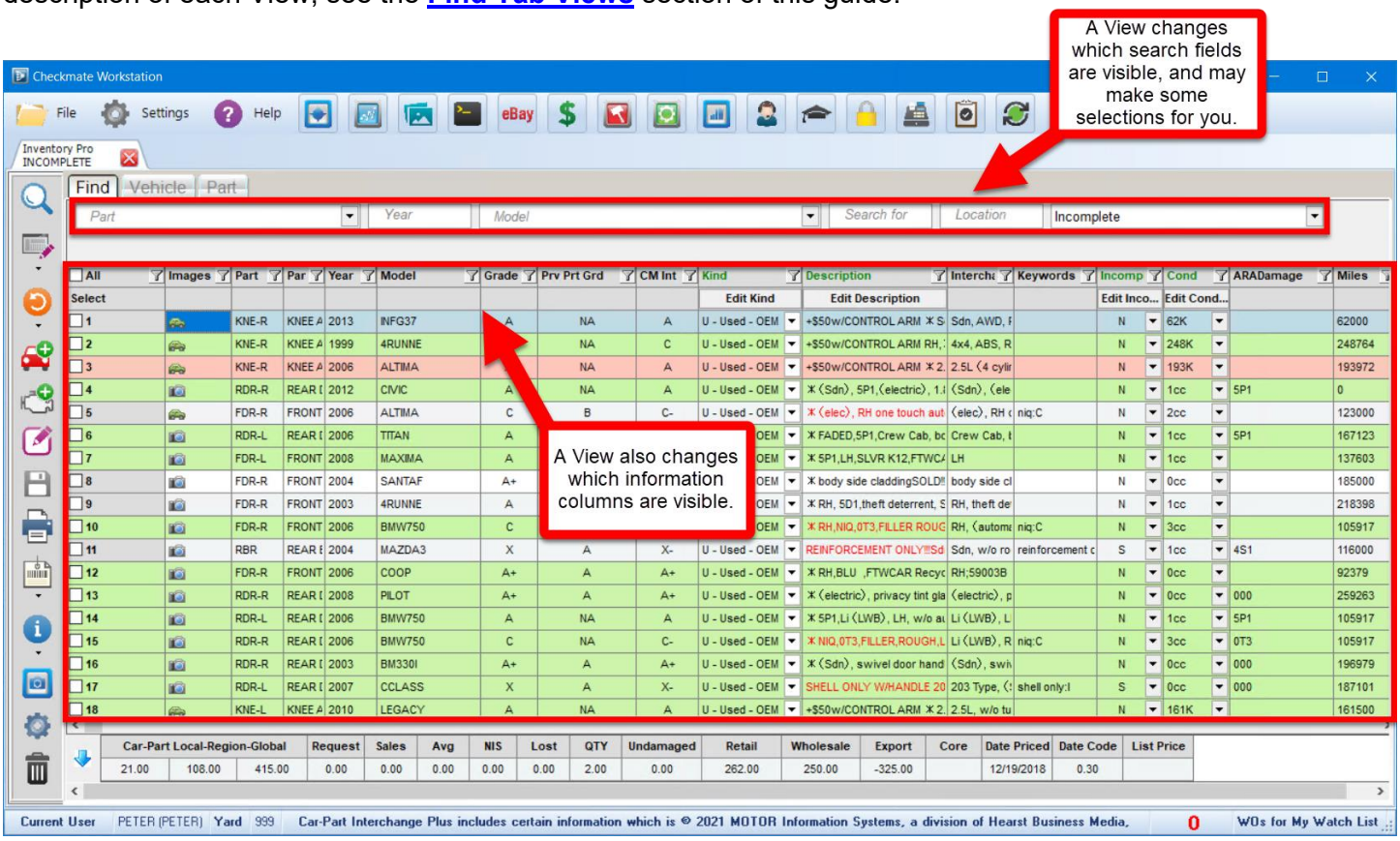
- **Save** – Save all changes and proceed.
- **Don't Save** – Proceed without saving.
- **Cancel** – Stay on the current screen with the unsaved changes.

Selecting a View – Find Tab

Inventory Pro has a feature called *Views*. When you select one of the Views, the configuration of the search fields and information columns will change according to that View.

For example, there's a dedicated View for dismantling, a View for identifying overpriced parts, and Views for focusing on part grading audits. Each View arranges Inventory Pro in a way most efficient for the task at hand.

Inventory Pro has a number of "canned" (preset) Views, but you can also create and save your own. This helps you easily have information arranged optimally for different tasks. For a list of "canned" Views and a description of each View, see the **Find Tab Views** section of this guide.

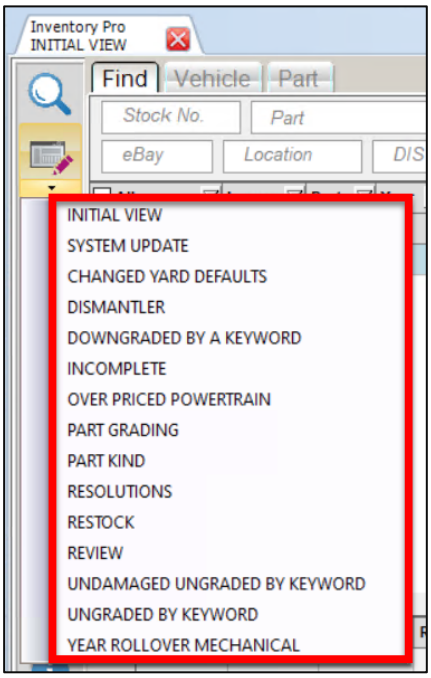


To use a View, follow these steps:

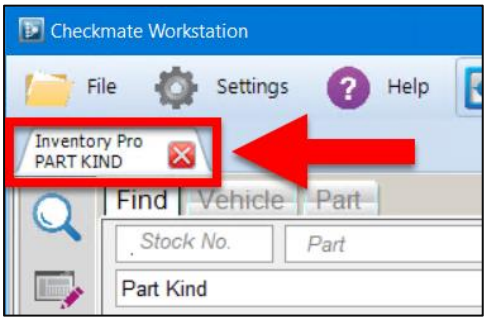
1. Click the select View drop-down arrow (if you click the button itself, Inventory Pro automatically selects the first View in the list*).

* To change which View is first in the list, see the **Managing the List of Views** section of this document.

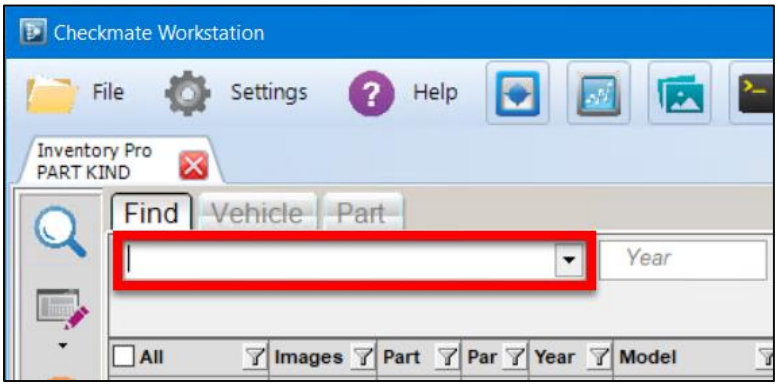
2. Click a View in the list to load that View. (It may take several seconds to load.)



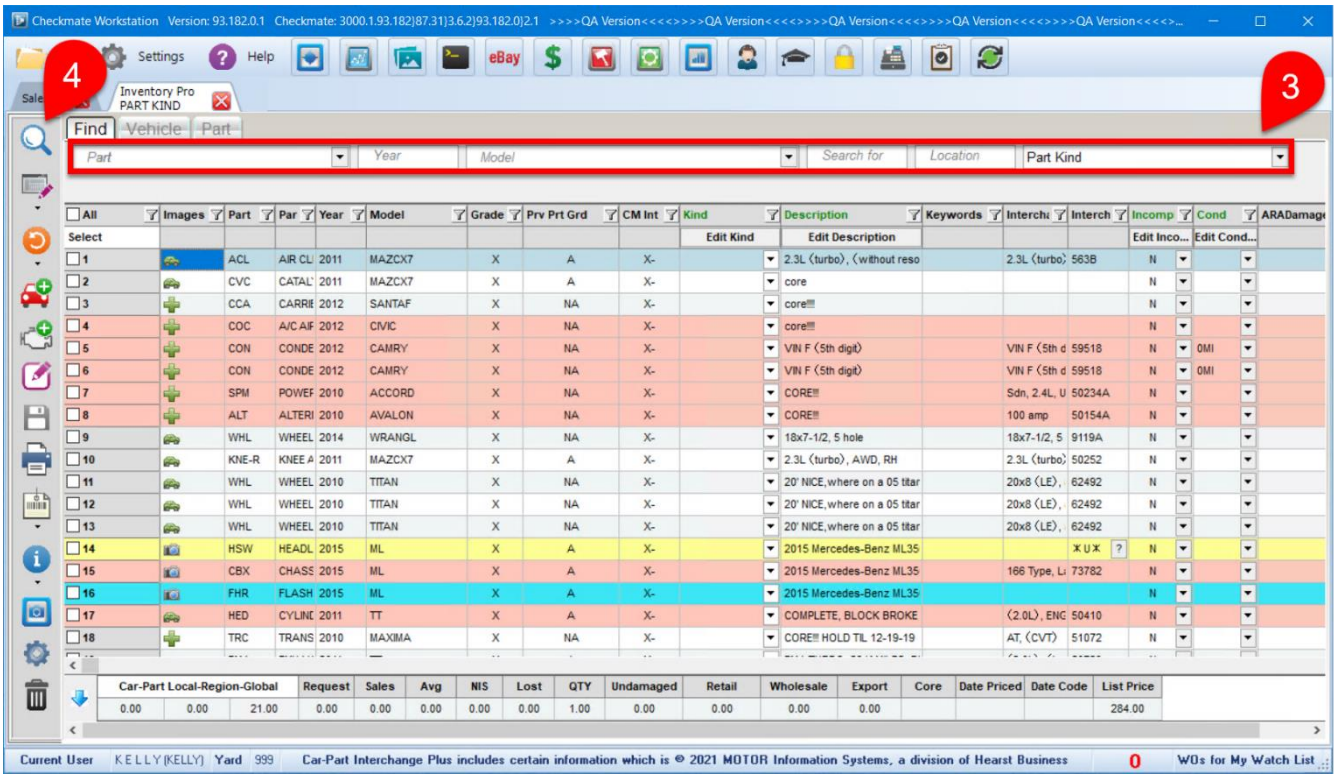
3. The name of the current View is now visible on the Inventory Pro tab. Inventory Pro rearranges the search fields and the information columns according to that View. Some search fields may also be automatically filled in for you (e.g., Views designed to help audit parts will have the **Part Grade Audit** field filled in with a specific audit).



(Optional) You can limit your search further by entering criteria in the available search fields. For example, if you have selected the Part Kind View, you could enter ENG in the **Part** field, to limit your search to only show only Part Kind inconsistencies for ENGs in your inventory.



4. Click the magnifying glass button to search your inventory according to the search fields. (When the View is first selected, the actual parts in the list remain the same; only the arrangement of the screen has changed. You must click the mangifying glass button to run the new search.)



Your search results display according to the current View.

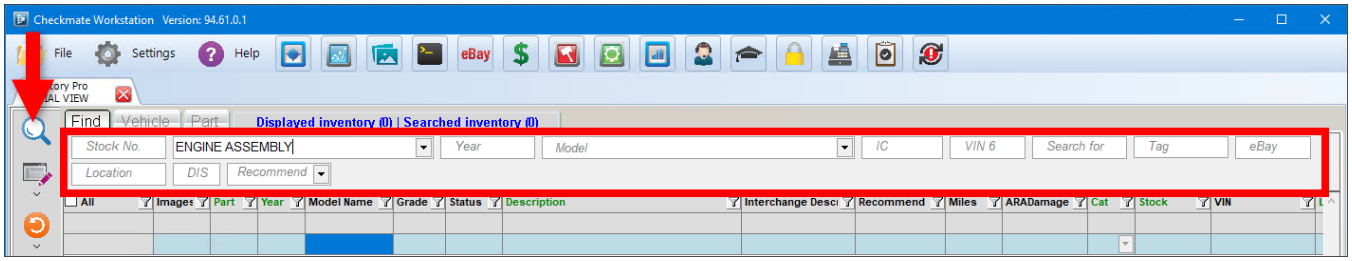
Searching for Inventory – Find Tab

The **Find** tab is the first tab in Inventory Pro. 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:

   Note: Not all search fields may display. To select which search fields to show or hide, right-click on a search field to open the **Search Parameter Selection** window.

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 Multiple Parts** section of this guide.

   c. Launch a Trading Partners or CrashLink search. For more info, refer to the **CrashLink and Trading Partners 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 report of the parts displayed on the **Find** tab. For more info about this, refer to the **Printing Parts on the Find Tab** 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.

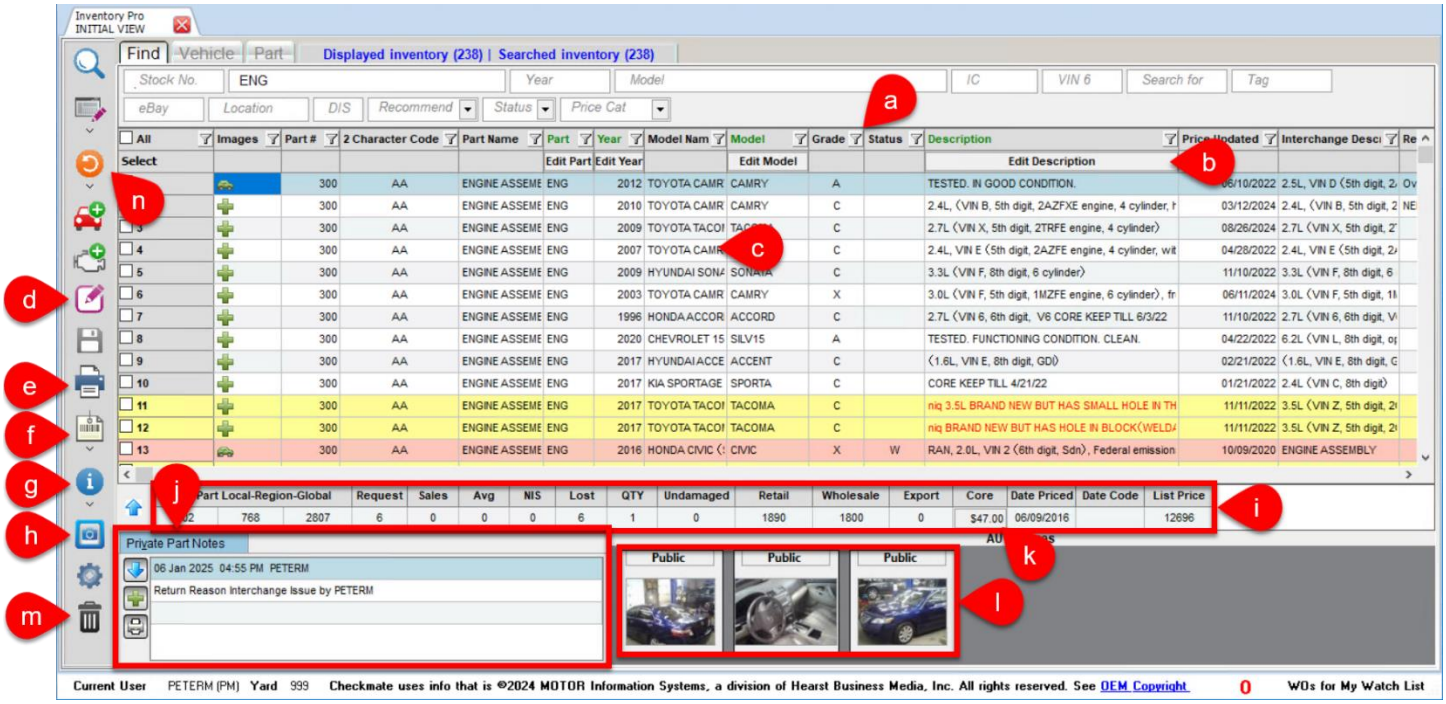
j. View, add, or print **Private Part Notes** for the selected part.

k. See core value of the selected part. (Car-Part.com Demand Data subscribers can click this field to see potential core buyers.)

l. See images for the highlighted part.

m. Delete parts from inventory. For more info, refer to the **Deleting Inventory** section of this guide.

n. Click to clear all search criteria and search results and start a new search.



Find Tab Views

Checkmate has a number of preset, or “canned” Views that were created with specific roles and workflows in mind.

The following table explains the purpose of each preset, or “canned” View. For step-by-step instructions for using each View, refer to these two sections of this guide:

- **Audit Views: Fixing Missing/Inconsistent Information**.
- **Inventory Management Views**

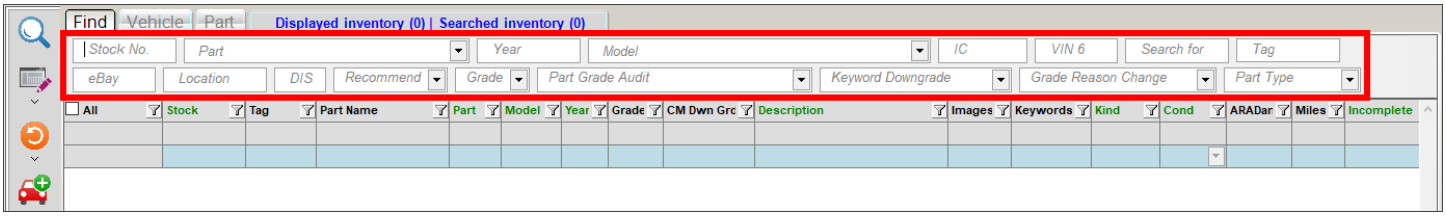
View Name	Purpose
INITIAL VIEW	This is a multi-purpose View that makes it easy to find and edit parts and vehicles in your inventory.
SYSTEM UPDATE	Auditing inventory. This View finds parts for which the grade changed when you updated the software or interchange. (For example, an update may align Checkmate with a new ARA grading standard.) The goal of this View is to help you confirm the new grades.
CARPART INCONSISTENCY	This View is typically only used by your support tech for troubleshooting. It displays any part grading inconsistencies between Checkmate and Car-Part.
CHANGED YARD DEFAULTS	Auditing inventory. This View finds parts for which the grade has changed as a result of a change to your yard settings. The goal of this View is to help you confirm the new grades.
DISMANTLER	Determine which vehicles and/or parts to prioritize during dismantling. The goal of this View is to help you make decisions about which vehicles and/or parts to dismantle. This View makes it easy to search by vehicle or by part, and includes price and request information to help locate and prioritize sales opportunities.
DOWNGRADED BY A KEYWORD	Improving inventory information. This View finds parts that were inventoried with some damage, but the value in their **Condition** field is inconsistent or conflicting with keywords in their **Descriptions**. Checkmate downgraded (lowered the grade of) or ungraded the part as a result. The goal of this View is to help you correct the part information, so that parts’ **Conditions** match their **Descriptions**.

View Name	Purpose
IMS CONVERSION	This View is typically only used by your support tech for troubleshooting. For customers who converted from another inventory management system (IMS), it displays grading changes that occurred during the conversion process.
INCOMPLETE	Improving inventory information. This View finds assemblies that are marked as complete, but Checkmate has reason to suspect they may be incomplete, (either because one or more components were added to a work order or deleted from inventory, or because a keyword in the part's **Description** field suggests the assembly is incomplete.) The goal of this View is to allow you to confirm whether the assembly is incomplete.
OVER PRICED POWERTRAIN	Identify powertrain parts that may be overpriced. The goal of this View is to find powertrain parts that may need prices adjusted. This View includes the **Recommend** search field, with the **$OVER** option preselected, which filters for parts that Checkmate has determined may be overpriced, due to many requests and few sales for these parts at your business.
PARTMATE INCONSISTENCY	This View is typically only used by your support tech for troubleshooting. It displays part grading inconsistencies between Checkmate and Partmate.
PART GRADING	Review and edit the grades of parts in your inventory. The goal of this View is to help you review part grades. Many search filters are available on this View to help you "drill down" to specific parts, issues, and reasons for grade change.
PART KIND	Improving inventory information. This View finds parts that Checkmate ungraded either because a keyword in the **Description** is inconsistent with the kind that was entered when the part was inventoried, or the part was inventoried without a kind. The goal of this View is to help you add, edit, or confirm the part kind.
RESOLUTIONS	Review/update Resolution Parts. Select this View and then click the magnifying glass to pull up Resolution Parts. These are parts that need interchange assigned. The goal of this View is to help you review your parts in resolution and assign interchange to them.

View Name	Purpose
RESTOCK	Restocking parts. This View searches for parts with RESTCK as their Location. The goal of this View is to help you find parts that need to be restocked.
REVIEW	Reviewing newly-inventoried vehicles. Select this View, enter a stock number in the **Stock Number** search field, then click the magnifying glass to pull up the parts on that vehicle and review them.
UNDAMAGED UNGRADED BY KEYWORD	Improving inventory information. This View finds parts that are marked undamaged, but have keywords in their descriptions that indicate damage; because of this inconsistency, Checkmate ungraded them. The goal of this view is to help you correct the part information.
UNGRADED BY KEYWORD	Improving inventory information. This View finds parts that were ungraded, due to a keyword in the Description. This keyword could suggest damage inconsistent with the Cond field, could suggest the part has already been sold, etc. The goal of this View is to help you correct the part information.
YEAR ROLLOVER MECHANICAL	Identifying mechanical parts for which Checkmate changed the part grade, because the calendar year has changed. (The standards for mechanical parts are partially based on the mileage “per year.”) The goal of this View is to allow you to review these grade changes that Checkmate made.

Find Tab Search Fields

The **Find** tab offers many ways to search for inventory. Anytime you are searching for inventory, you can use just one search field, or you can use multiple search fields at once.



Depending on your display settings and which View is currently selected, not all search fields may be displayed. You can change which search fields are visible by right-clicking on a search field to open the **Search Parameter Selection** window.

The following describes how to use each search field:

- **Stock No. –** 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 **W02**. 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 being with ‘9B’ and end in ‘A.’

- **DIS (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 (e.g. **>365**).
    - Type **<** and a number to search for parts with a number of days in stock that is *less* than the number you type (e.g. **<365**).
- **Recommend** – Select a recommendation to search for parts with a particular Checkmate recommendation.
- **Grade** – Select a part grade to search for parts with a particular grade.
- **Part Grade Audit** – Select an option to search for parts that have been re-graded or ungraded by Checkmate because of missing or inconsistent part data. Most of these audits are incorporated into a View and intended to be used by using the entire associated View. Refer to the **Selecting a View – Find Tab** and **Find Tab Views** sections of this guide for more information.
    - **Undamaged Part Ungraded by a Keyword** – Parts that are marked undamaged, but have keywords in their descriptions that caused Checkmate to ungrade them.
    - **Downgraded by a Keyword** – Parts that had keywords in their descriptions that caused Checkmate to downgrade them (this includes parts marked undamaged that Checkmate ungraded).
    - **Yard Settings Changed** – Parts that had grades that changed as a result of a change to your yard settings.
    - **Car-Part Inconsistency** – Parts for which the Car-Part.com grade doesn't match the Checkmate grade (this will be rare). This is typically only used by your support tech for troubleshooting.
    - **System Update** – Parts for which the grade changed when you updated the software or interchange. (For example, an update may introduce a new grading standard.)
    - **Partmate Inconsistency** – Parts for which the Partmate grade does not match the Checkmate grade (this will be rare). This is typically only used by your support tech for troubleshooting.
    - **IMS Conversion** – Parts that received a new grade in Checkmate, after you converted from a different management system. This is typically only used by your support tech for troubleshooting.
    - **Part Kind** – Parts that were ungraded because a keyword indicates that the part's **Kind** is different than the **Kind** entered when the part was inventoried, or the part was inventoried without a **Kind**
    - **Incomplete** – Incomplete assemblies, because one or more components were added to a work order or deleted from inventory, or a keyword in the part's description suggests the assembly is not complete.
    - **Mechanical Mileage Unknown** – Mechanical parts for which the mileage could not be determined.*

* How Checkmate determines the mileage of parts is controlled in Checkmate Retro using the **Part Grading** function (Checkmate Full: **6,10,9** or Checkmate Classic: **S3,10** or Checkmate Junior: contact support).

- **Keyword Downgrade** – Select an option to search for parts that were downgraded or ungraded, based on a selected category of keywords in their descriptions:
    - **Downgraded (D)** – Parts that have been downgraded, but not ungraded, due to a keyword.
    - **Ungraded (U)** – Parts that have been ungraded.
    - **Zero Damage Objection (O)** – Parts that have been ungraded, because the ARA damage code for the part indicates no damage, but a keyword indicates damage.
    - **Incomplete (I)** – Assemblies that have been ungraded, because a keyword indicated they were incomplete.
    - **Kind Aftermarket (KA)** – Parts that have been ungraded, because a keyword indicates they are aftermarket parts, but are inventoried with different a part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “AFTMKT” in its description.
    - **Kind Reman (KM)** – Parts that have been ungraded, because a keyword indicates they are remanufactured parts, but are inventoried with a different part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “REMAN” in its description.
    - **New OEM (KN)** – Parts that have been ungraded, because a keyword indicates they are new OEM parts, but they are inventoried with a different part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “NEW” in its description.
    - **New Discount OEM (KD)** – Parts that have been ungraded, because a keyword indicates they are new OEM parts, but are inventoried with a different part kind. For example, a part that is inventoried with the kind U – Used OEM, but has the keyword “OEM DISCOUNT” in its description.
- **Grade Reason Change** – Select an option to search for parts that have had the grade adjusted for the selected reason:
    - **Year Rollover** – Mechanical parts that were regraded, because the calendar year has changed. (The standards for mechanical parts are partially based on the mileage “per year.”)
    - **System Update** – Parts that were regraded when you updated your Checkmate software or interchange.
    - **Yard Settings Changed** – Parts that were regraded as a result of changes made to your yard settings.
    - **User Part Edit** – Parts that were regraded when someone manually changed the description, ARA damage code, or condition.
    - **User Vehicle Mileage Edits** – Mechanical parts that were regraded when someone manually changed the mileage of the AUT record associated with the parts.
- **Part Type** – Select a grading part type to search for parts with a particular grading part type.

Manage Display

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

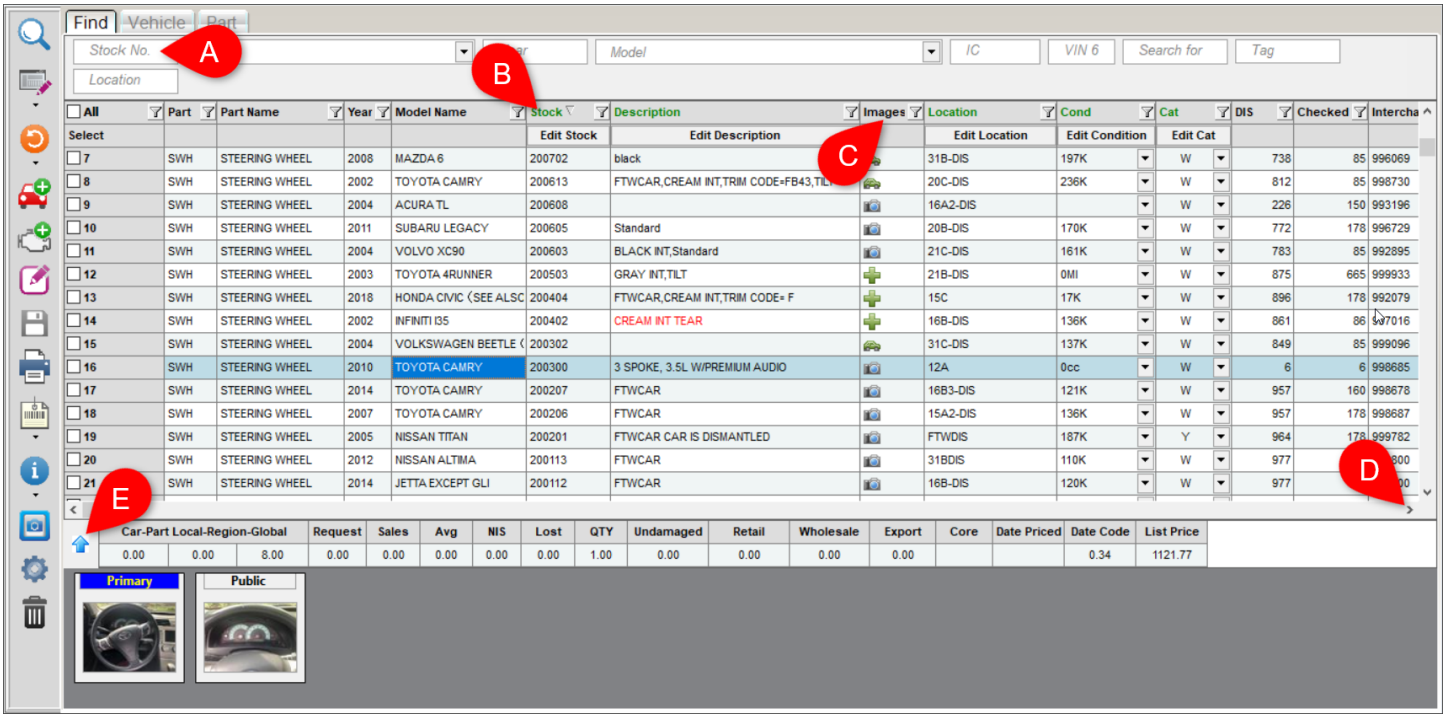
A. Right-clicking any search field to select which search fields to show or hide.

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

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

D. 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).

E. Clicking the blue arrow to show/hide the image tray.

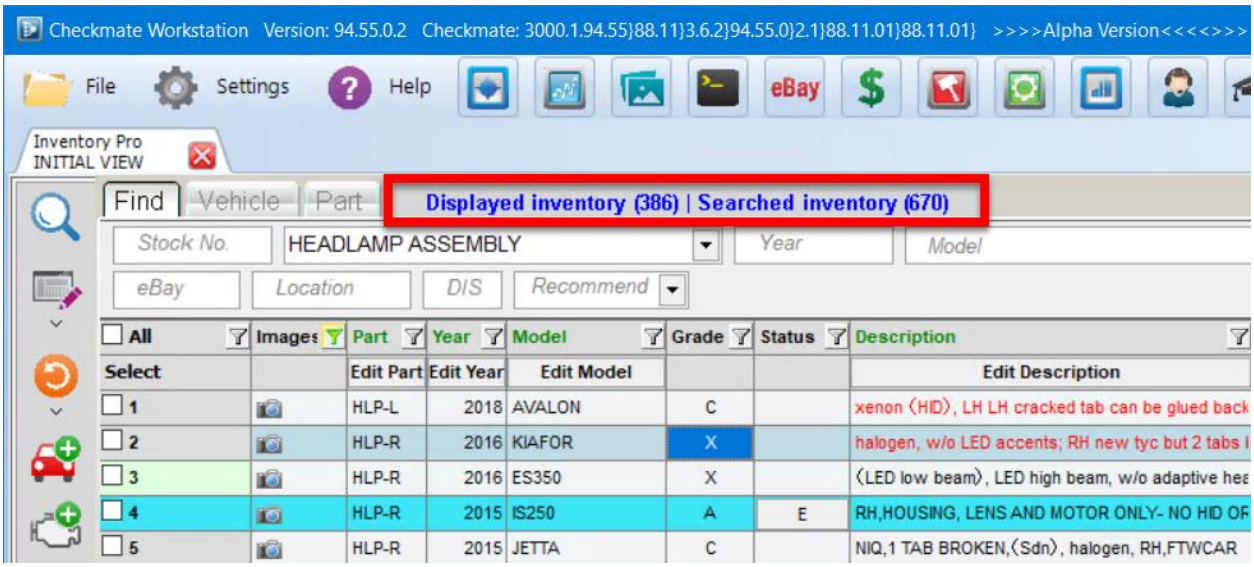


Note: You can quickly re-organize the columns and search fields that display by selecting a different View. To learn more, refer to the section of this guide called: **Selecting a View – Find Tab**.

Displayed and Searched Inventory

The top of the screen 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**.

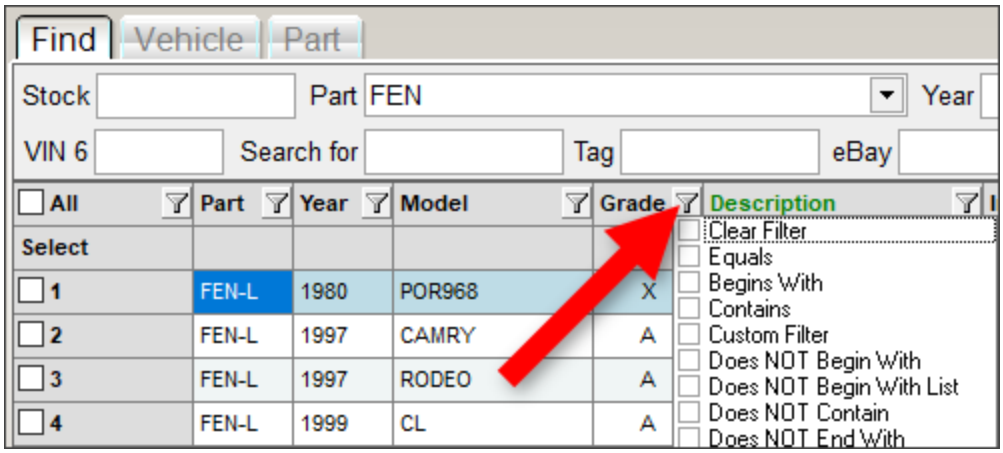


For example, let's say you searched your inventory for HEADLAMP ASSEMBLY. Your search results initially included 670 parts, so your **Displayed Inventory** and your **Searched Inventory** would initially both display 670. If you then filtered your results to only show A grade parts (using the filter on the **Grade** column), the **Displayed Inventory** would become a lower number. If you have 200 A grade headlamp assemblies, then the **Displayed Inventory** would display 200, and the **Searched Inventory** would display 670 (the total original search results).

Filter Search Results

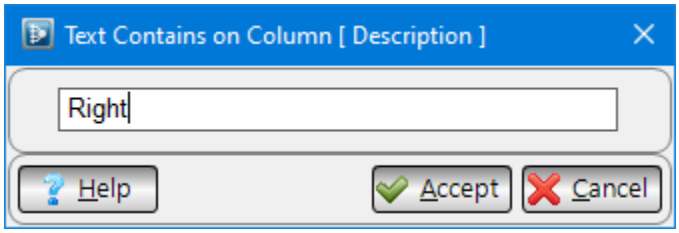
Filters allow you to view only certain parts in your search results (e.g., you can filter by the **Grade** column to only see parts of a certain grade).

On the **Find** tab, click the filter button 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.

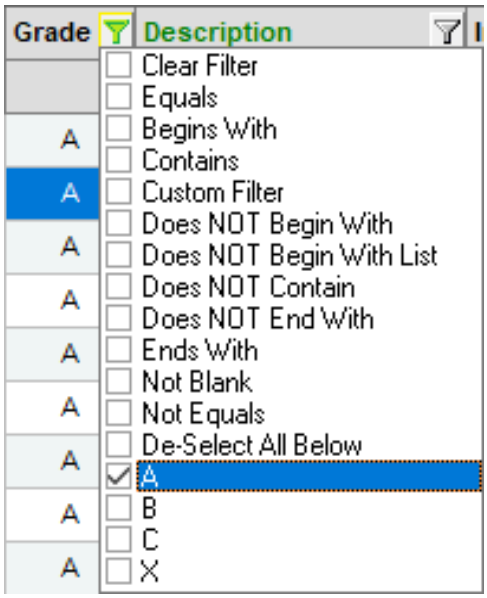


Here's how it works:

1. On any column, click the filter button.
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."

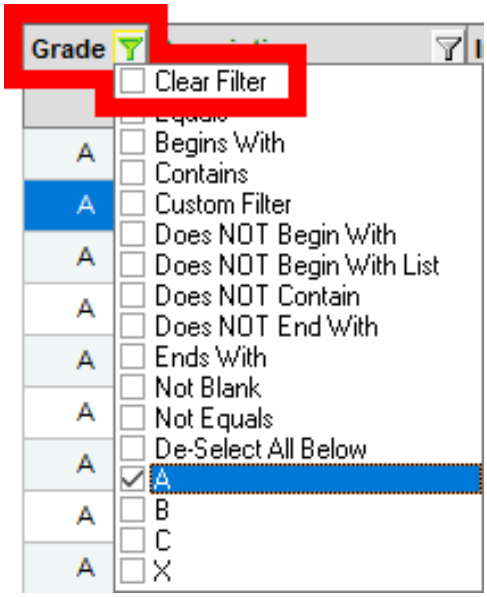


- Exact filters. The filter menu may display options that allow you to select exact information to filter by.
    - For example, in the **Grade** column, you can simply click the **A** option to filter your results to *only* show parts with a grade of A.



- 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 on a column by clicking the green filter icon and selecting **Clear Filter**.



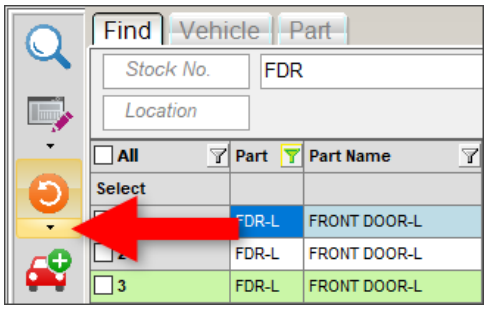
⚠ **Note:** Filters on multiple columns can be applied simultaneously (for example, you could now add a filter in the **Year** column to only show parts with a grade of A, *and* a year of 2009-2012).

If you use the same filter(s) regularly, you can save your favorite custom filters for easy future use as part of a custom View. For more information, refer to the **Creating and Saving Custom Views** section of this guide.

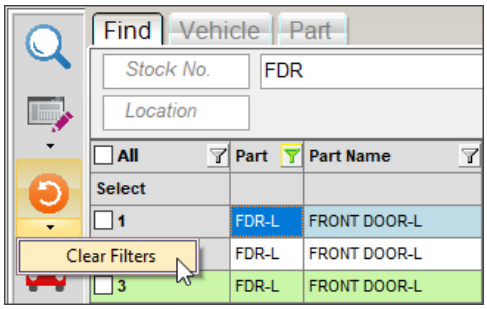
Clearing All Filters

To clear all filters currently applied to your search results, follow these steps:

1. Click the down arrow on the reset button.



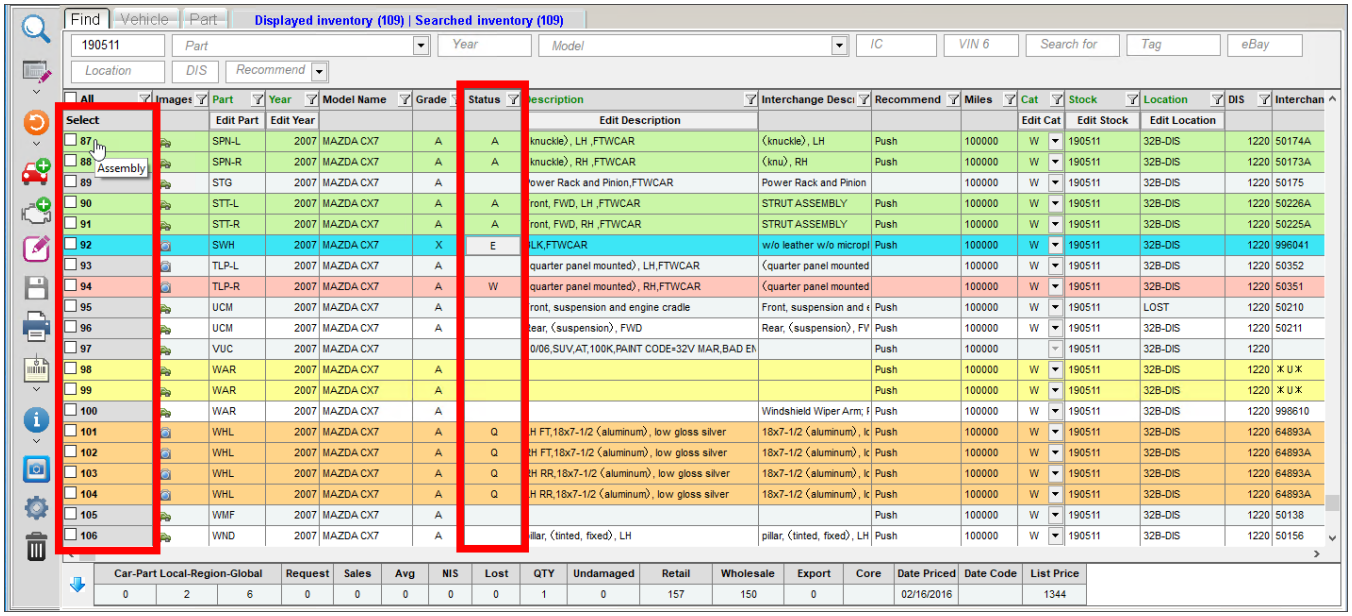
2. Select **Clear Filters**.



Part Colors

In search results on the **Find** tab, how a part displays gives you information about the part, with just a glance:

- If a part **Description** is red, this means the part grade is determined by a keyword in the **Description**.
- Parts with a certain **Status** are colored 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 the colors:

Color	Status	Priority
	W Work Order **I** Invoice **S** Sold **D** Deleted **C** Committed on eBay	High ↑
	H Hold **Q** Quote	
	Resolutions Non-exact Interchange	
	E Listed on eBay **X** Expired eBay Listing	
	A Assembly/component	↓ Low
Red part **Description**: Power, non-heated, RH,NICK	The part's **Description** contains 1 or more keywords that is inconsistent with the value in its **Miles/Cond** field.	

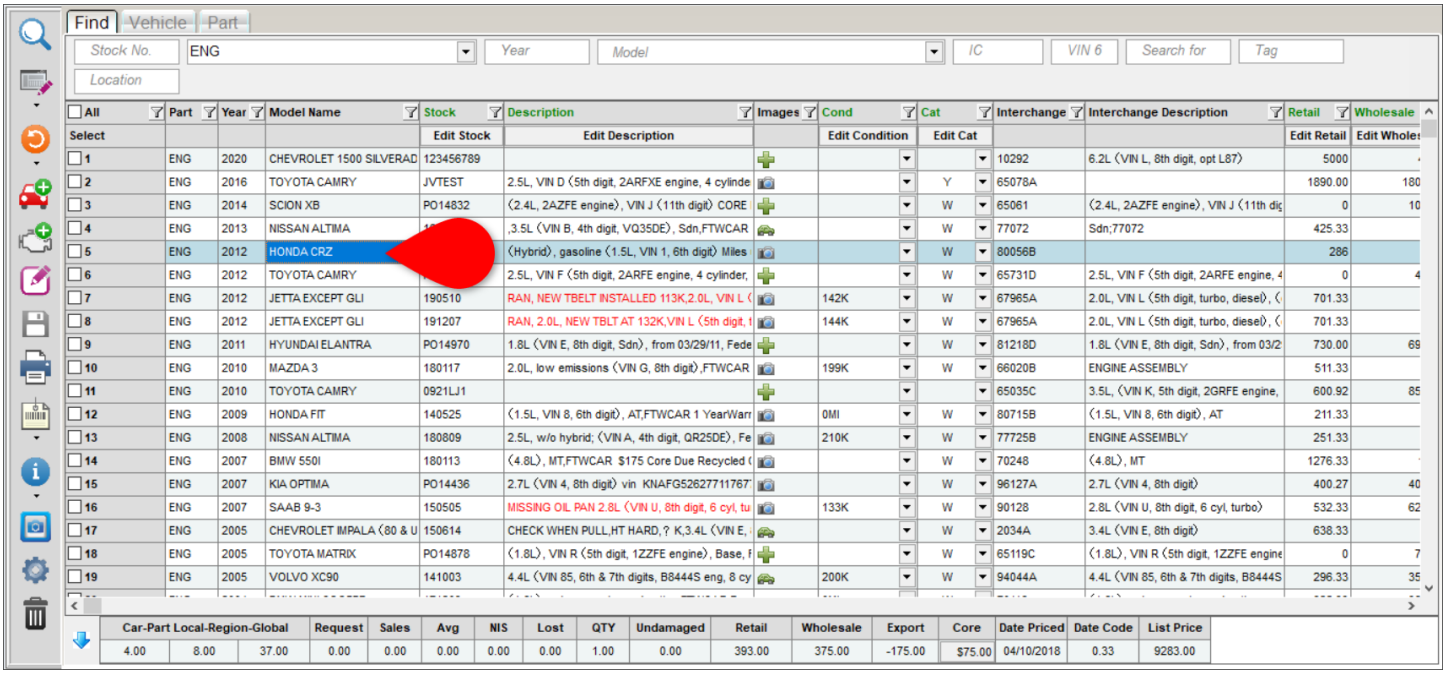
If a part has more than one status, the color for the highest priority status displays. In this table, colors are listed in order of priority, highest priority at the top.

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 Partners 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**.

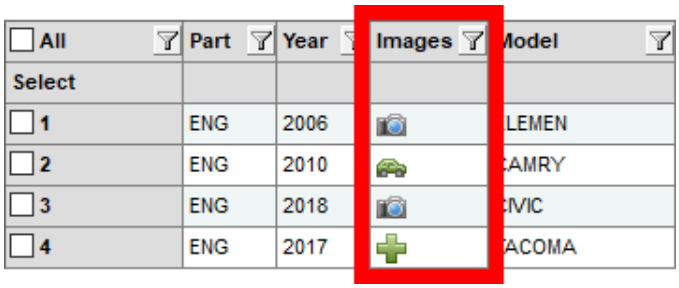


⚠ **Note:** You can also perform these searches while editing or adding a part on the **Part** tab.

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:

- – There are part images associated with this part.
- – There are AUT images associated with this part.
- – There aren't any images associated with this part.



All	Part	Year	Images	Model
Select				
1	ENG	2006		LEMEN
2	ENG	2010		AMRY
3	ENG	2018		IVIC
4	ENG	2017		ACOMA

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.

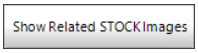
Fit the image to the window.

Show the image's actual size.

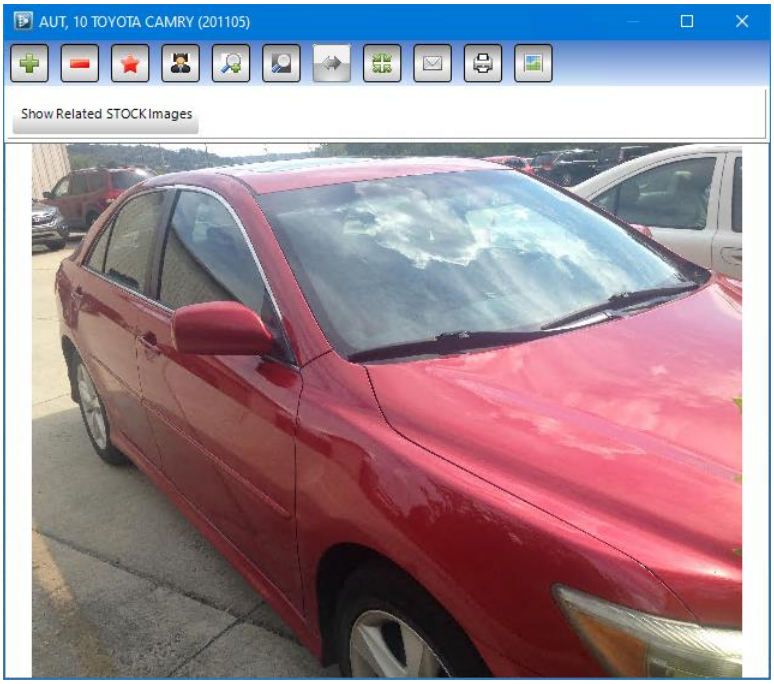
Email the image.

Print the image.

Open the **Image Editor** window to edit the image.



See all images associated with this stock number.



Close this window to return to the **Find** tab.

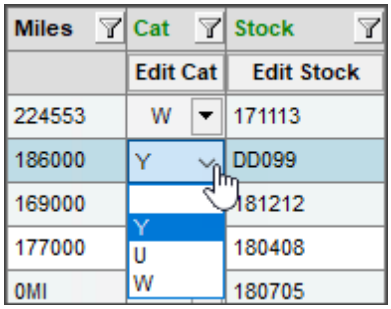
Individual Part Editing on the Find Tab

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:

- **Part**
- **Model**
- **Year**
- **Description**
- **Category**
- **Location**
- **Stock** number
- **Retail** price
- **Wholesale** price
- **My List** price
- **Kind**
- **Condition**
- **Private** status
- **Review** status
- **Incomplete** status
- **Grade Ok**
- **Dismantle to**

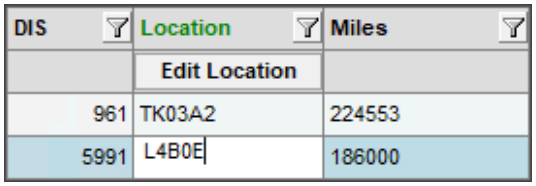
You can edit multiple parts at the same time (refer to the **Bulk Editing Multiple Parts** section of this guide for more info) or you can edit just one part:

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



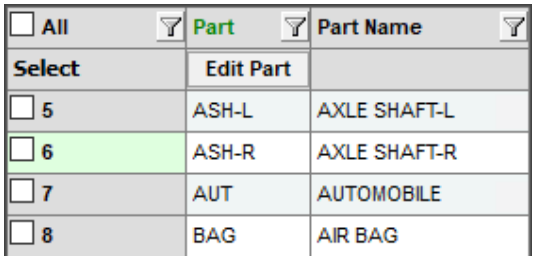
- Free-form typing fields: click inside the field and type your edit.

  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.



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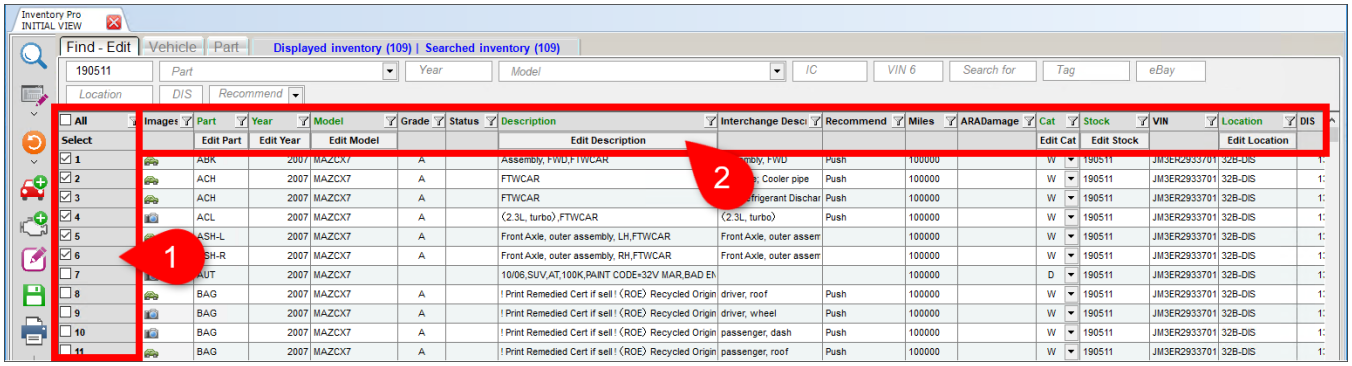
Bulk Editing Multiple Parts

In search results on the **Find** tab, you can edit multiple parts simultaneously. The columns that can be bulk edited have headers that are colored green. You can bulk edit the following:

- **Part**
- **Model**
- **Year**
- **Description**
- **Category**
- **Location**
- **Stock** number
- **Retail** price
- **Wholesale** price
- **My List** price
- **Kind**
- **Condition**
- **Private** status
- **Review** status
- **Incomplete** status
- **Grade Ok**
- **Dismantle to**

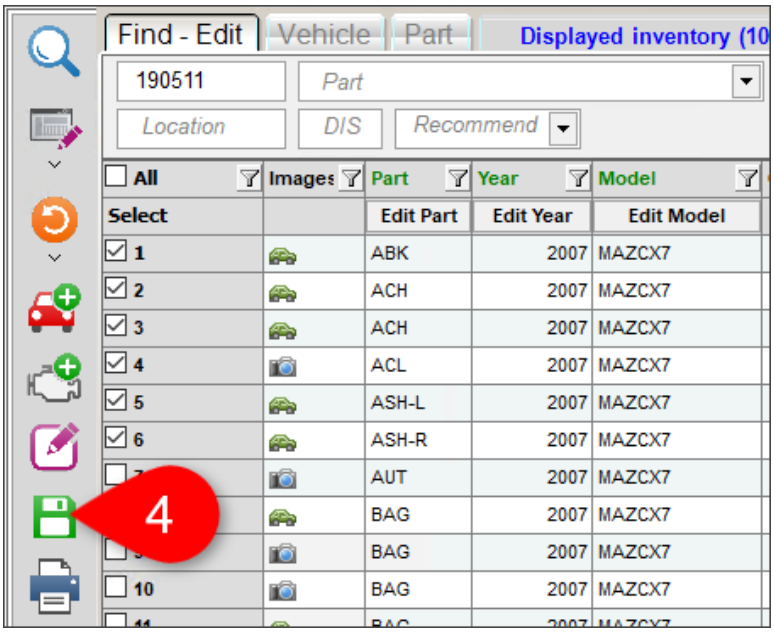
To do so, follow these steps:

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.

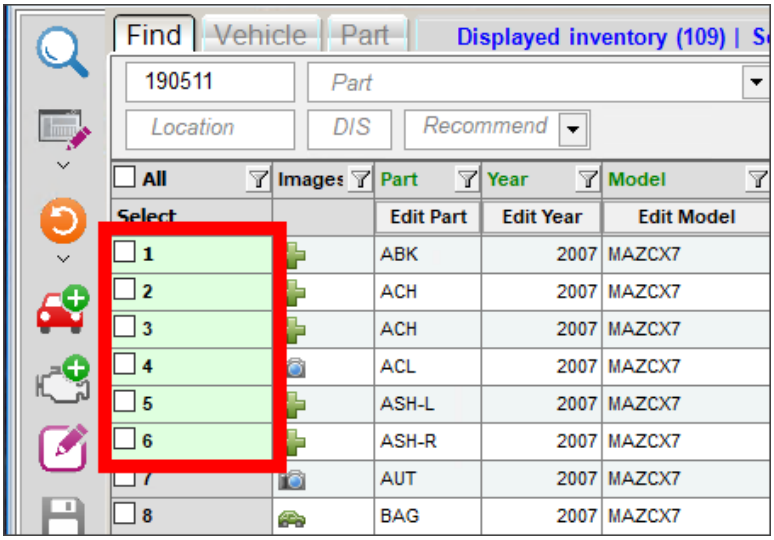


3. In the bulk editing window that displays, designate the information you want to change and then **Accept** your changes to return to the **Find** tab. For more information about bulk editing windows, refer to the sections below.

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.



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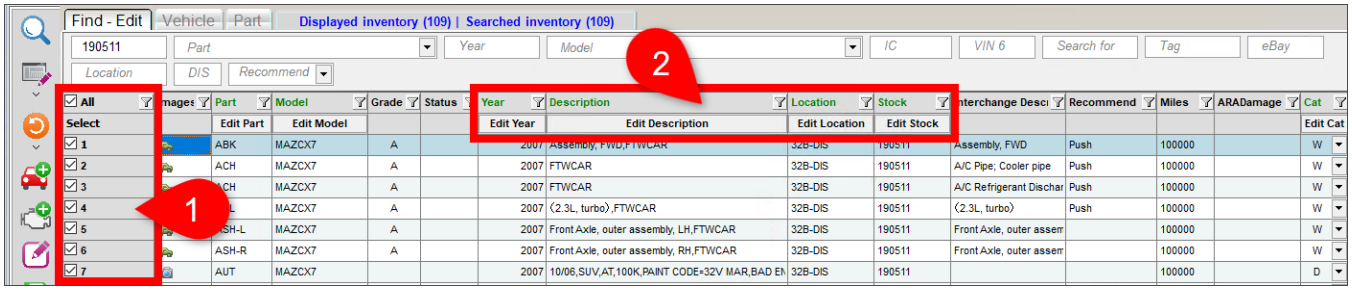
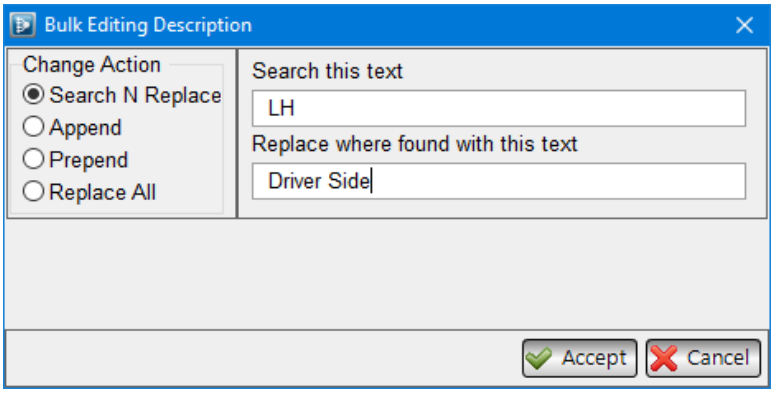
Bulk Edit Year, Description, Location, or Stock Number

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

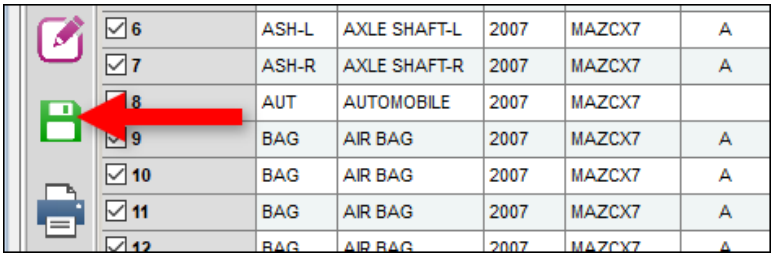
1. In the checkbox column, check the boxes to select the parts you want to edit.
2. At the top of your search results, click the **Edit** button in the column you want to edit.



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.



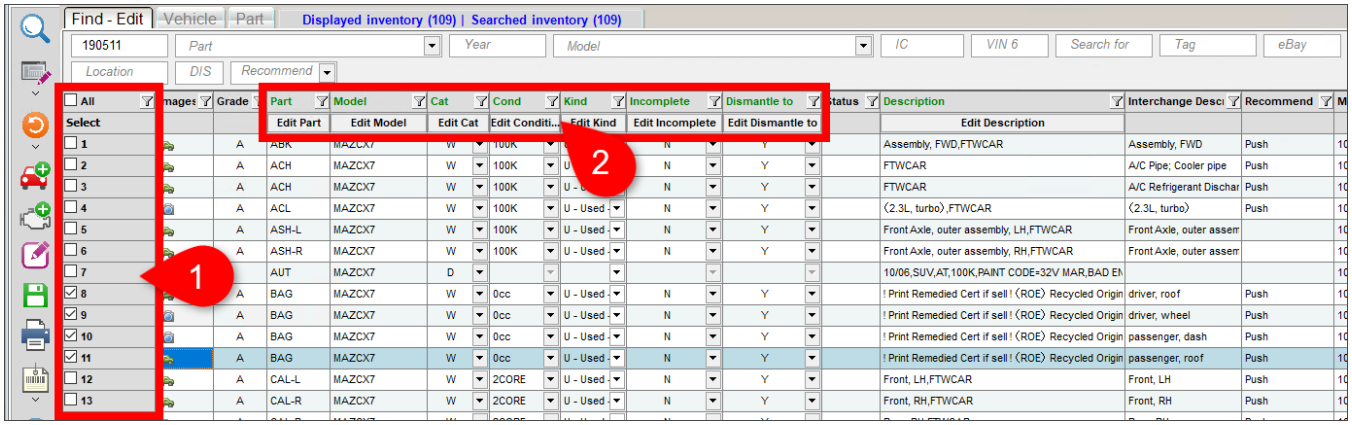
4. Use the text box(es) to the right to specify the text you would like to use to perform the **Change Action** you selected.
5. Click **Accept** to return to the search results.
6. Click the save button. (Changes are *not* saved until you click save.)



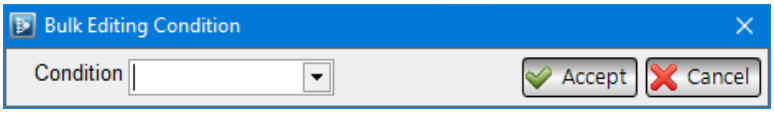
Bulk Edit Part, Model, Category, Condition, Kind, Incomplete, or Dismantle to

To edit the **Part**, **Model**, **Cat** (Category), **Cond** (Condition), **Kind**, **Incomplete**, or **Dismantle to** value for multiple parts at once, follow these steps:

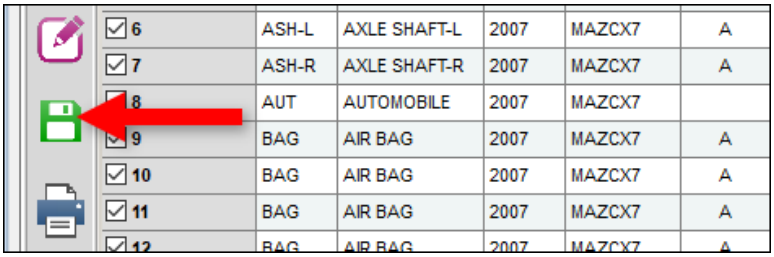
1. In the checkbox column, check the boxes to select the parts you want to edit.
2. At the top of your search results, click the **Edit** button in the column you want to edit.



3. The **Bulk Editing** window opens. Click the down arrow to select the desired **Part**, **Model**, **Category**, **Condition**, **Kind**, **Incomplete**, or **Dismantle to** value.



4. Click **Accept** to return to the search results.
5. Click the save button. (Changes are *not* saved until you click save.)

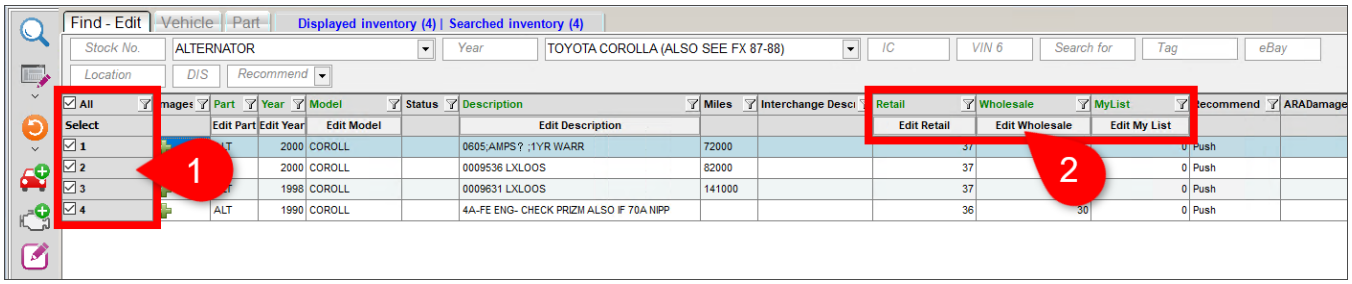


Bulk Edit Retail, Wholesale, or My List Price

Editing the retail or wholesale prices of parts only affects the price of the part; this does not change other prices (e.g., core or freight prices).

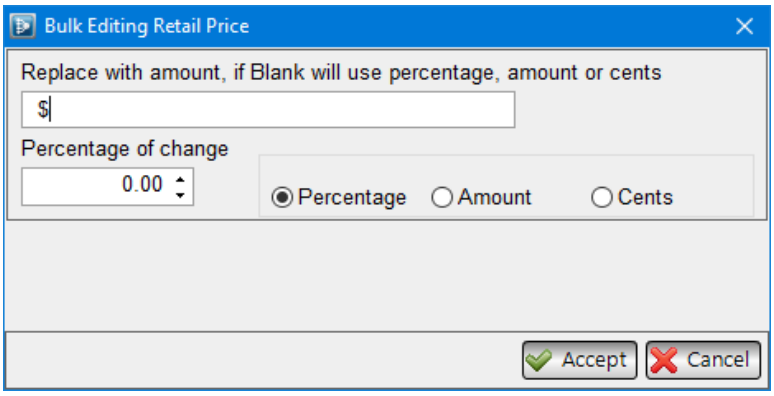
To edit the **MyList**, **Retail**, or **Wholesale** price for multiple parts at once, follow these steps:

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 **Edit** button in the column you want to edit.



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.)

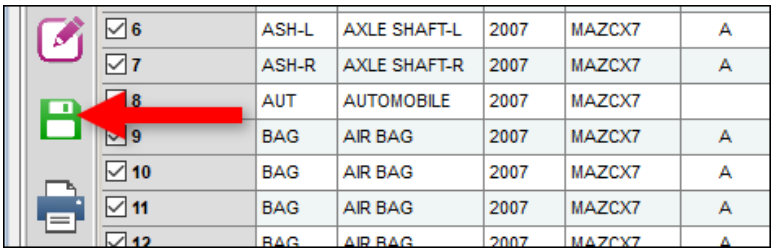
     ⚠ **Note:** If you have the cent field indicator setting turned on, the cent amount will populate with the current date code*.



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

* This is configured in Checkmate Retro using the **Change Inventory Questions** function (Checkmate Full: **6,10,3** or Checkmate Classic: **S3,3** or Checkmate Junior: contact support.)

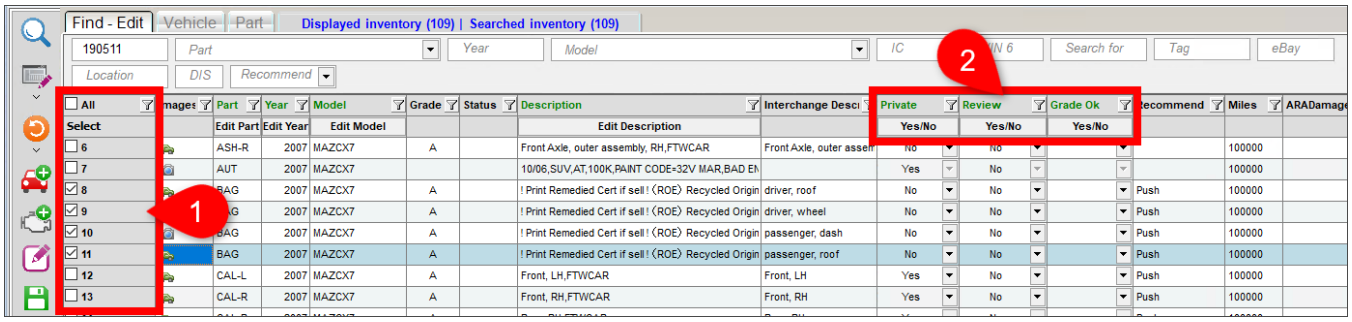
5. Click the save button. (Changes are *not* saved until you click save.)



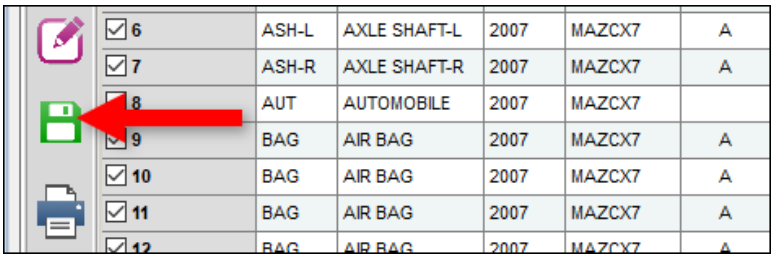
Bulk Edit Review, Private, or Grade Ok Status

To edit the **Review**, **Private**, or **Grade Ok** 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 the column you want to edit, until the selected parts are toggled to the desired status.
    - **Private** or **Review**
        - **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**
    - **Grade Ok**
        - **Grade Ok** – The status of the selected parts is **Grade Ok**.
        - Blank – The status of the selected parts is blank.



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 **Year**, **Model**, **Location** and **Description** of the AUT record.

☐ All	Part	Part Name
Select	Edit Part	
☑ 5	ASH-L	AXLE SHAFT-L
☑ 6	ASH-R	AXLE SHAFT-R
☑ 7	AUT	AUTOMOBILE
☑ 8	BAG	AIR BAG
☑ 9	BAG	AIR BAG

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 **Year**, **Model**, **Location**, **Description** *and* **Category** of the AUT records.

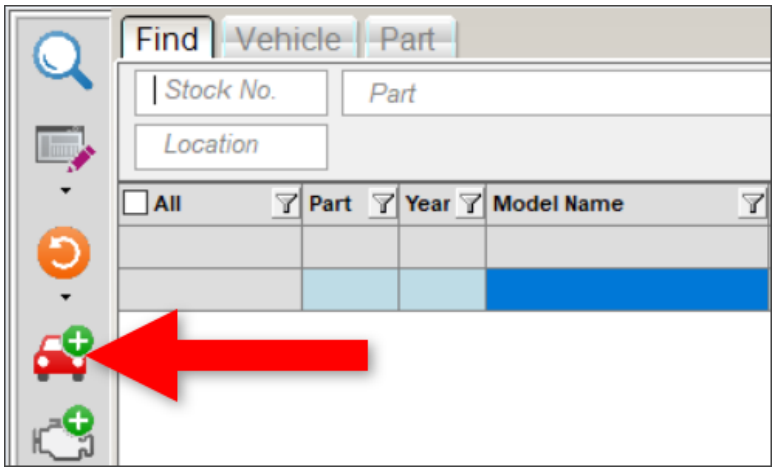
☑ All	Part	Part Name
Select	Edit Part	
☑ 1	AUT	AUTOMOBILE
☑ 2	AUT	AUTOMOBILE
☑ 3	AUT	AUTOMOBILE
☑ 4	AUT	AUTOMOBILE
☑ 5	AUT	AUTOMOBILE

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

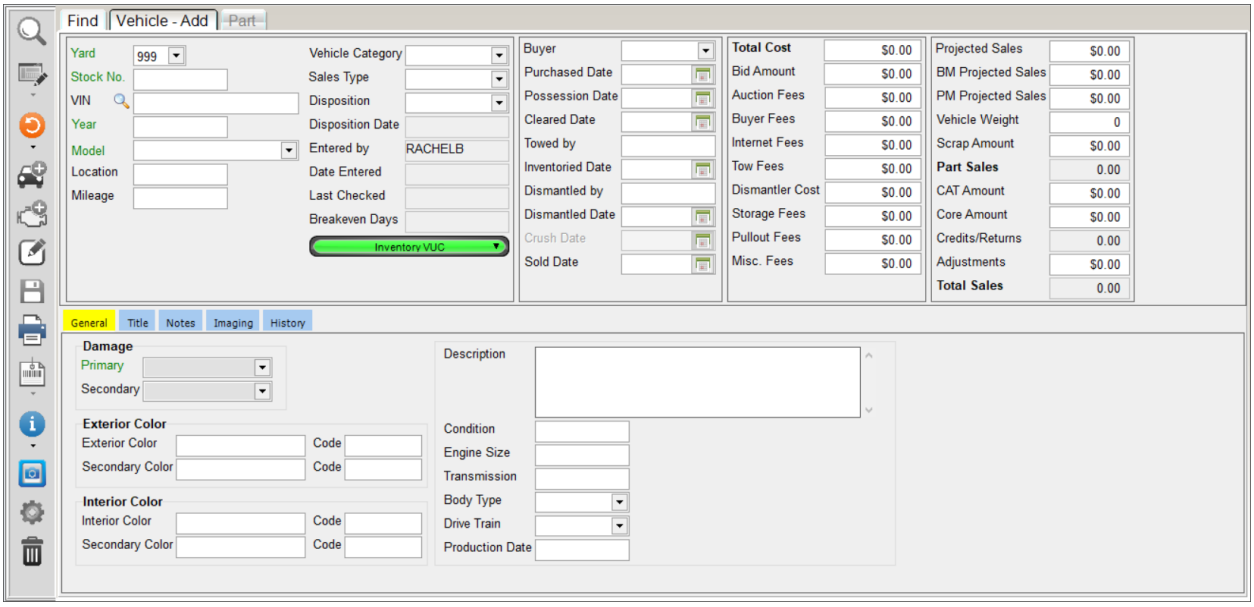
Adding a Vehicle

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

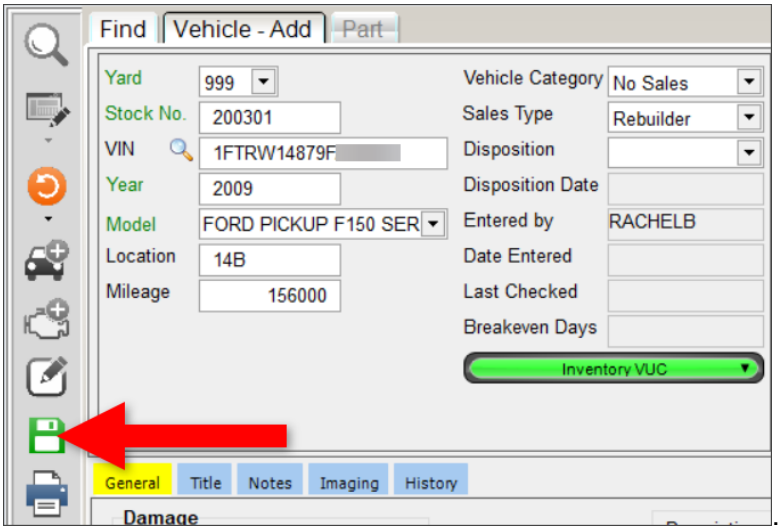
1. On the **Find** tab, click the add vehicle button.



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.



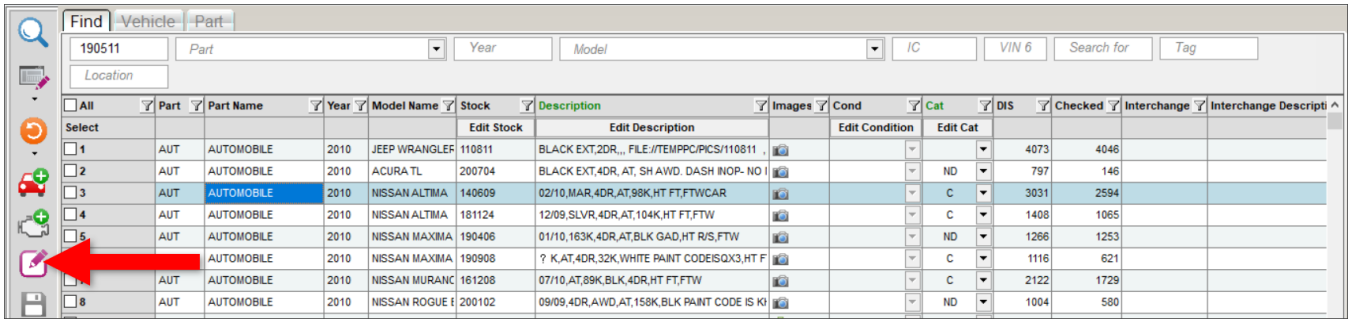
3. When you've finished putting in the information for the vehicle, click the save button to add the vehicle to your inventory.



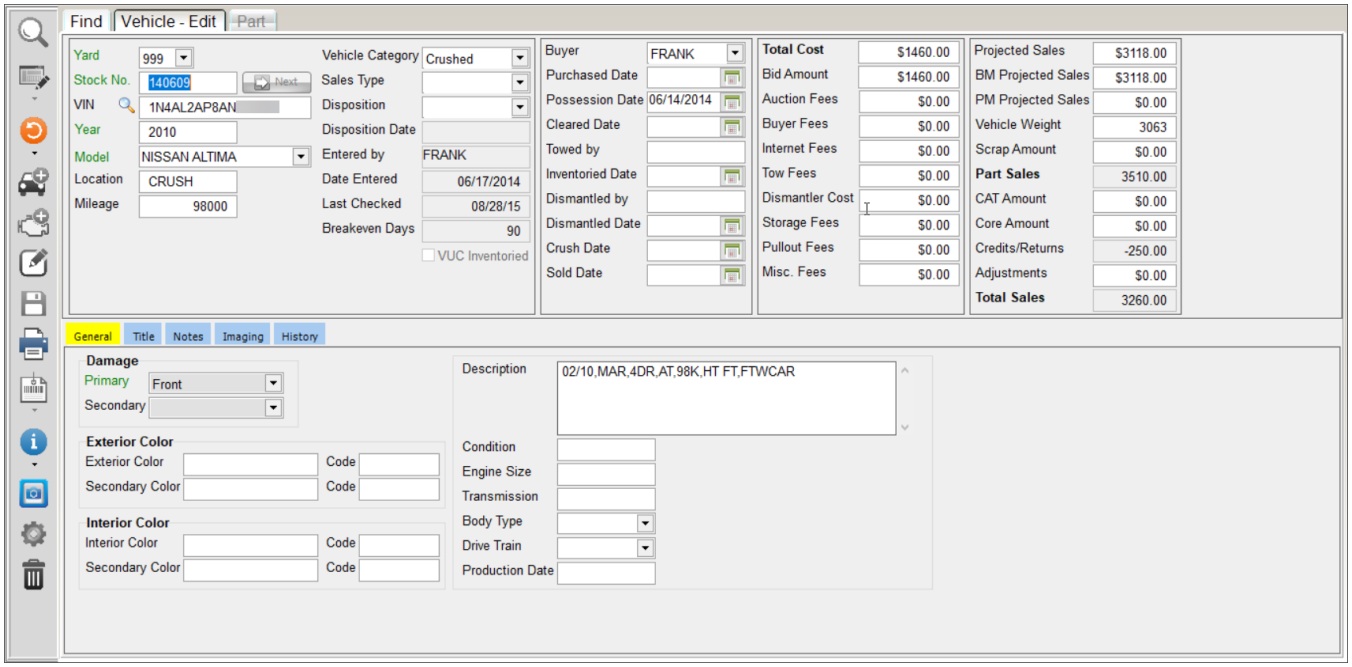
Editing a Vehicle

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

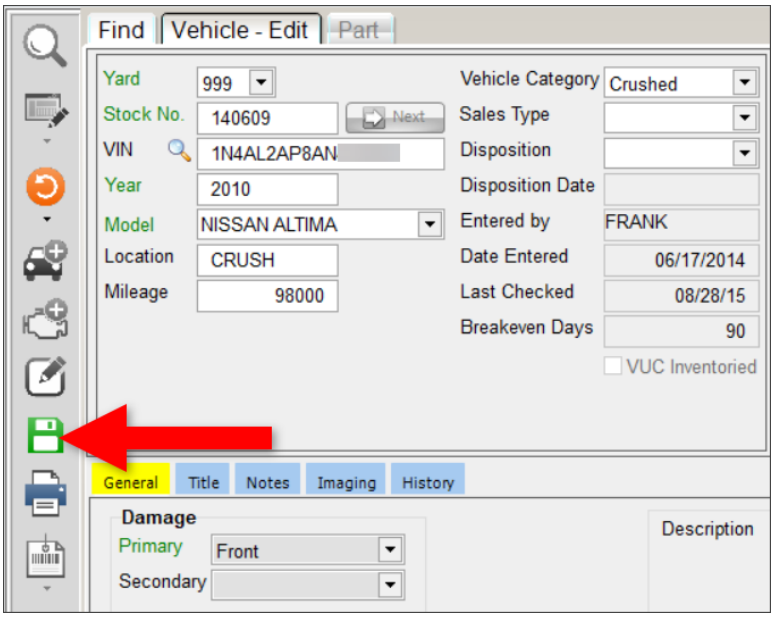
1. On the **Find** tab, search for the vehicle you want to edit. (For more info about searches, refer to the **Searching for Inventory – Find Tab** section of this guide.)
2. In your search results, locate the AUT (automobile record) for the vehicle you want to edit and double-click it. You can also 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.



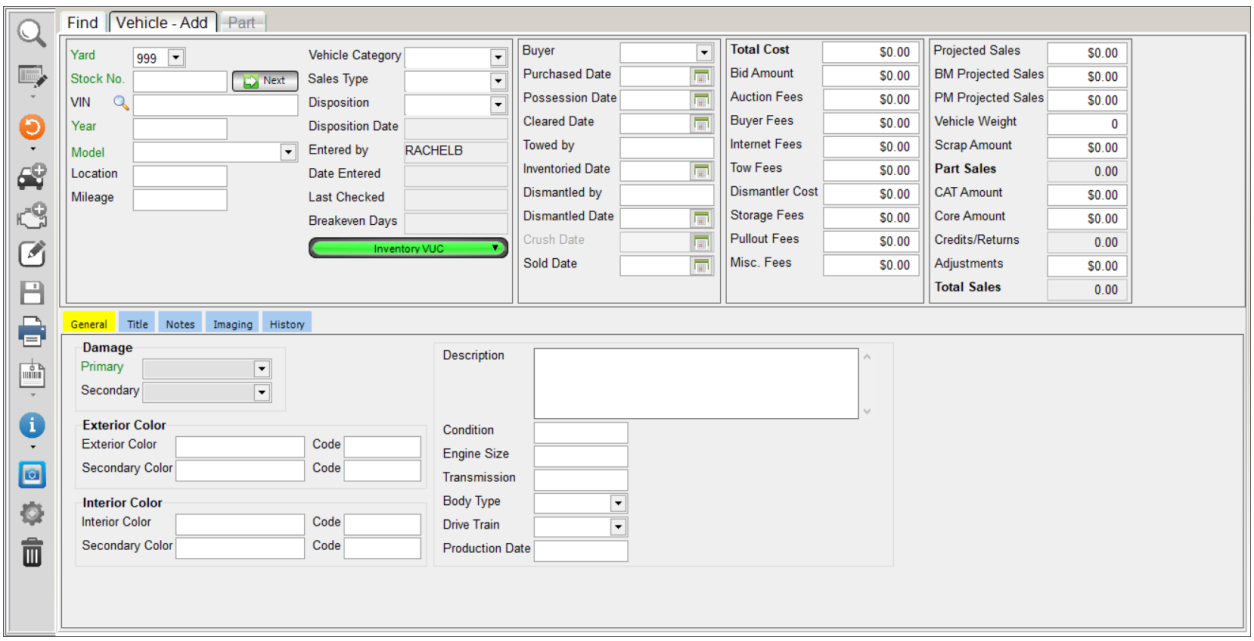
4. When you are finished editing, click the save button.



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:

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.*
- **VIN** – Type the VIN. Click the magnifying glass button 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.
- **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).

* You can set up automatic stock number sequencing in Checkmate Retro using the **Change Inventory Questions** function (Checkmate Full: **6,10,3** or Checkmate Classic: **S3,3** or Checkmate Junior: contact support.)

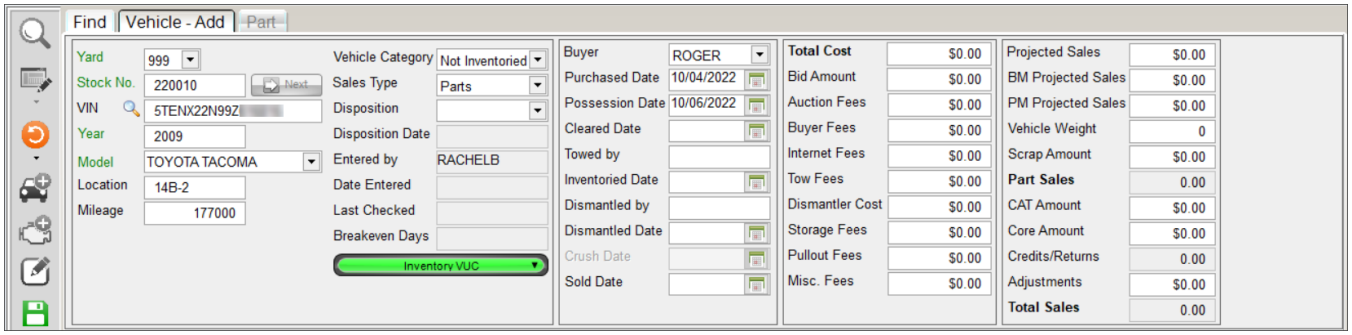
- **Offsite** – If you select this option, the **Purchased Date** will populate with the current date (if it was previously blank).
- **Not Inventoried** – If you select this option, the **Possession Date** will populate with the current date (if it was previously blank).
- **No Sales**
- **Not Dismantled** – 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:

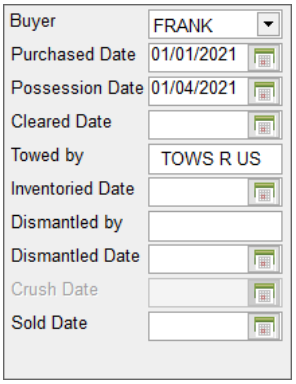
Inventory VUC – A VUC will automatically be added to your inventory when you click save to add the vehicle to your inventory.

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.



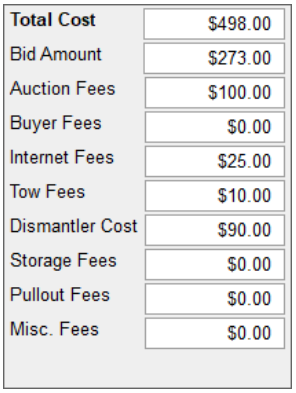
- Use the next section to add or edit purchasing and inventory information:



    - 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.

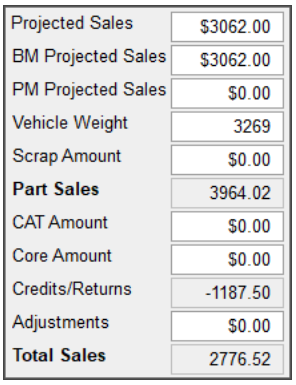
- In the next section of fields, type in the costs and fees for the vehicle.



    - 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.
    - The **Bid Amount** field is a display-only field that Checkmate calculates in real-time 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.

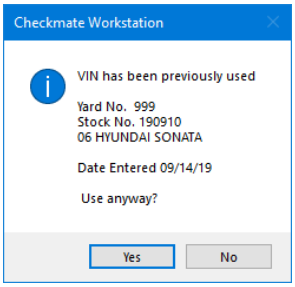


    - **Projected Sales** – If projected sales amounts were entered in Partmate and the vehicle is exported to Checkmate, those amounts display here. You can edit these amounts.
    - **Part Sales** – Populates with the dollar amount of part sales from this vehicle.
    - **Credits/Returns** – Populates with the credits and returns from this vehicle.
    - **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.

When you click the save button, if another vehicle record has the same VIN as the one you entered, a message displays warning that this VIN has been previously used, and asking if you want to use the VIN anyway:

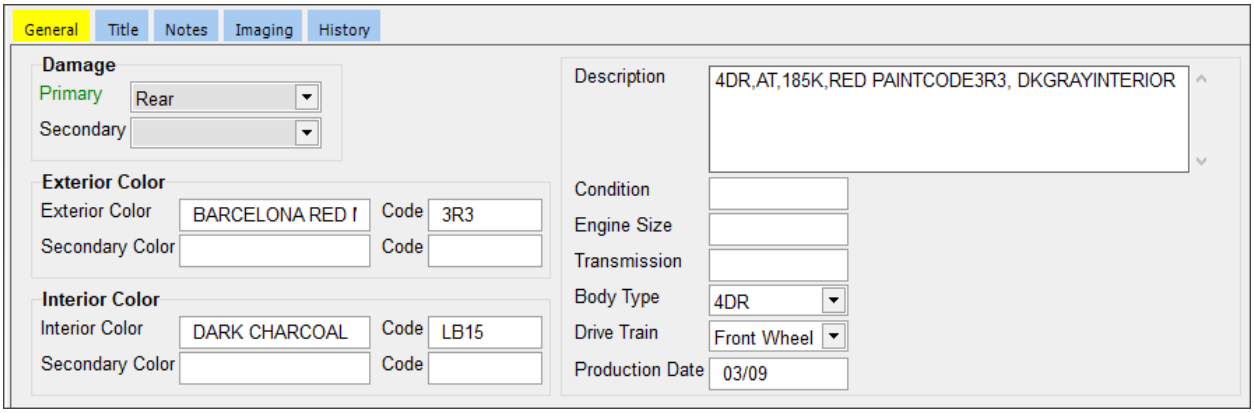


- **Yes** – Click to save the record with the VIN without changing it. The vehicle will be added with that VIN.
- **No** – Click to *not* save the record, and edit the VIN before saving.

Vehicle – General Tab

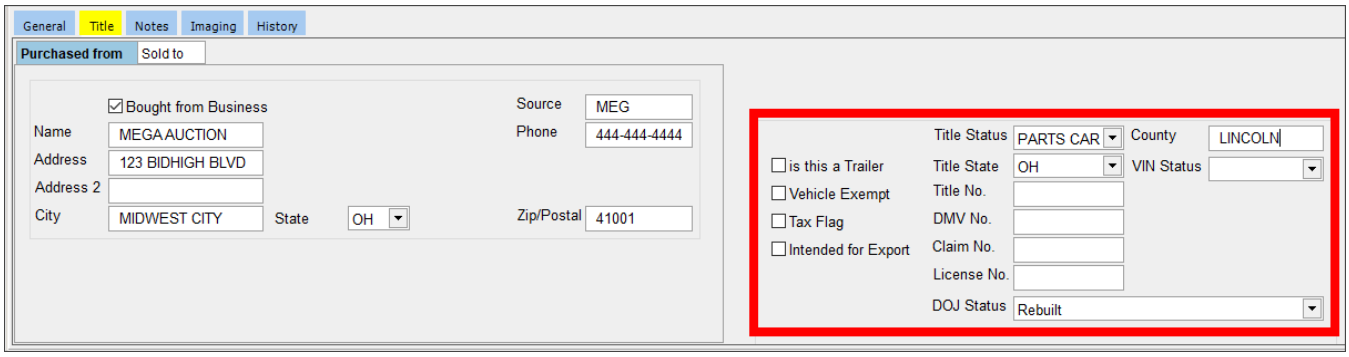
On the **General** tab, you can add or edit the vehicle's damage, exterior and interior colors, **Description**, and other general information.

- **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.



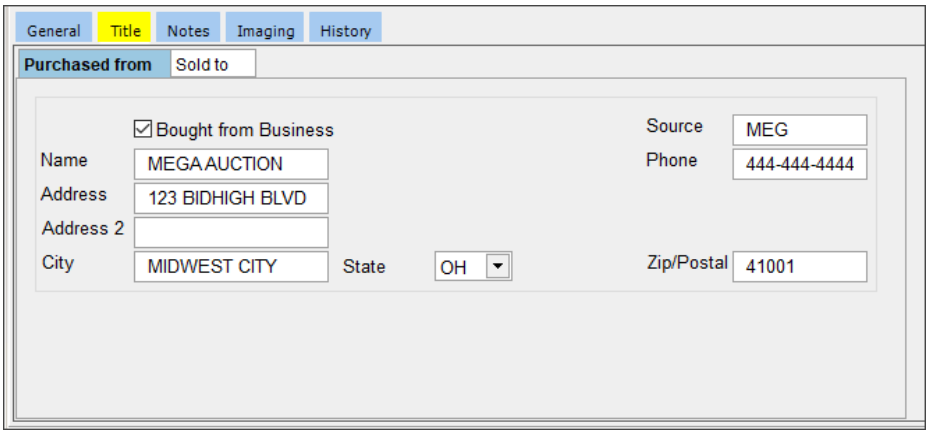
Vehicle – Title Tab

On the **Title** tab, add or edit information about the vehicle's title. This information is used for NMVTIS reporting.

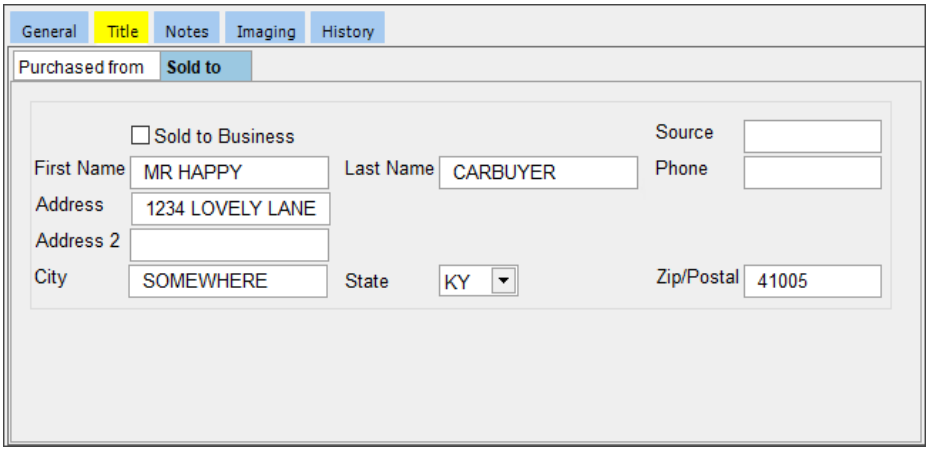


⚠ **Notes:** The options in the **Title Status** and **VIN Status** fields are set up in your Checkmate settings*.

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.



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* You can maintain these options in Checkmate Retro:

- **Title Status** options – Use the **Change or Delete Parts** function (Checkmate Full: **2,5** or Checkmate Classic: **I3** or Checkmate Junior: **2,4** or **2,5**) 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** or Checkmate Classic: **S20** or Checkmate Junior: contact support).

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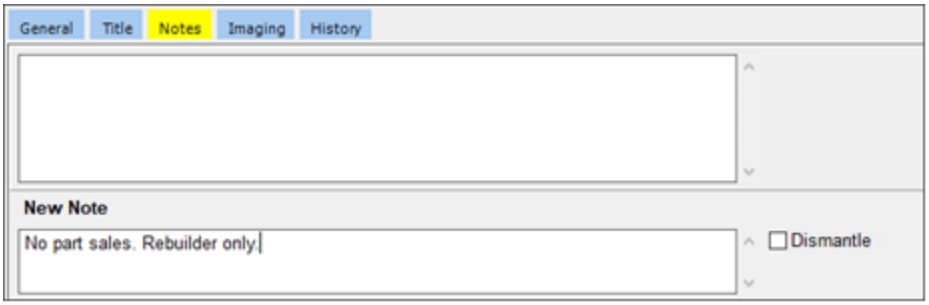
Vehicle – Notes Tab

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.

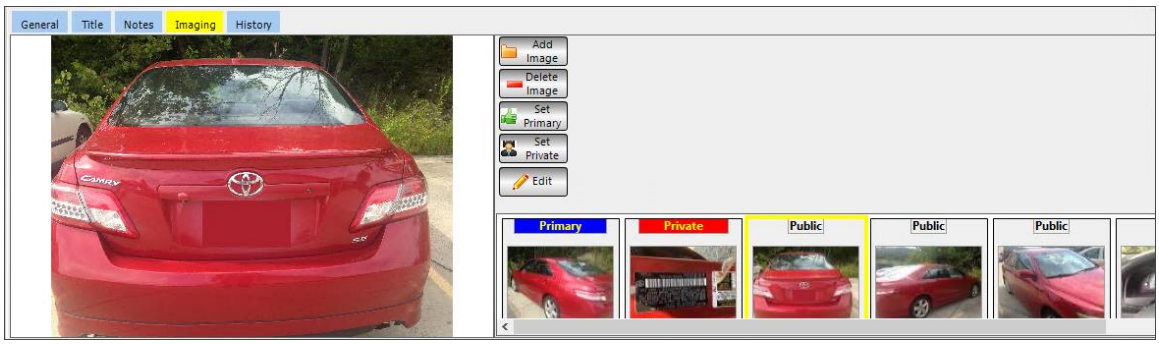
  If this is a note for the dismantler, click to check the **Dismantle** box. If this vehicle is pulled into Partmate, this note will print on the Partmate **Dismantling Report**.



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.
- **Edit** – Edit the selected image. For more info about editing images, refer to the section of this guide called: **Image Editor**.



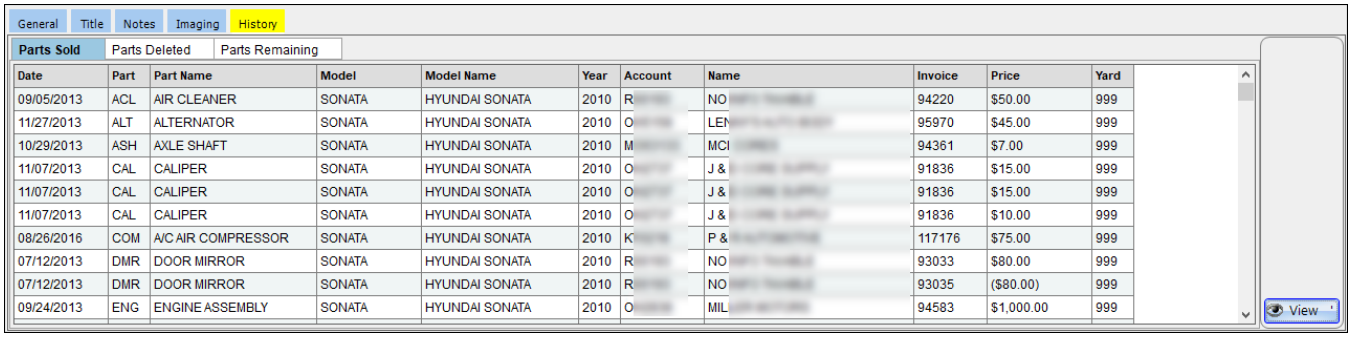
⚠ **Notes:** You can drag and drop images from your hard drive into the **Imaging** tab to associate them with the vehicle. To add multiple images at one time using this method, hold down the **Ctrl** key while selecting the images and then drag them into this tab.

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**



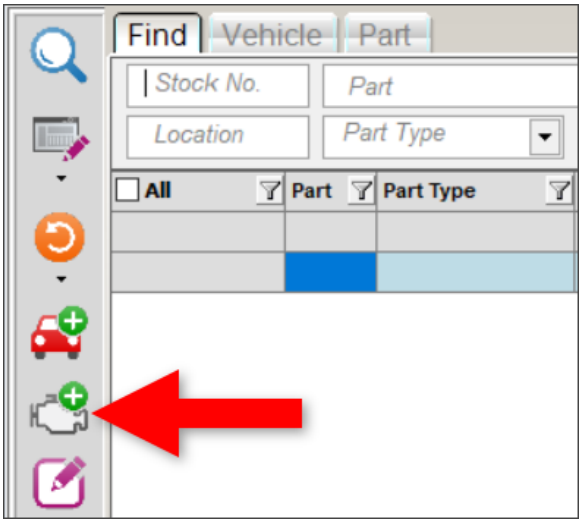
Date	Part	Part Name	Model	Model Name	Year	Account	Name	Invoice	Price	Yard
09/05/2013	ACL	AIR CLEANER	SONATA	HYUNDAI SONATA	2010	R	NO	94220	$50.00	999
11/27/2013	ALT	ALTERNATOR	SONATA	HYUNDAI SONATA	2010	O	LEI	95970	$45.00	999
10/29/2013	ASH	AXLE SHAFT	SONATA	HYUNDAI SONATA	2010	M	MCI	94361	$7.00	999
11/07/2013	CAL	CALIPER	SONATA	HYUNDAI SONATA	2010	O	J &	91836	$15.00	999
11/07/2013	CAL	CALIPER	SONATA	HYUNDAI SONATA	2010	O	J &	91836	$15.00	999
11/07/2013	CAL	CALIPER	SONATA	HYUNDAI SONATA	2010	O	J &	91836	$10.00	999
08/26/2016	COM	A/C AIR COMPRESSOR	SONATA	HYUNDAI SONATA	2010	K	P &	117176	$75.00	999
07/12/2013	DMR	DOOR MIRROR	SONATA	HYUNDAI SONATA	2010	R	NO	93033	$80.00	999
07/12/2013	DMR	DOOR MIRROR	SONATA	HYUNDAI SONATA	2010	R	NO	93035	($80.00)	999
09/24/2013	ENG	ENGINE ASSEMBLY	SONATA	HYUNDAI SONATA	2010	O	MIL	94583	$1,000.00	999

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

Adding a Part

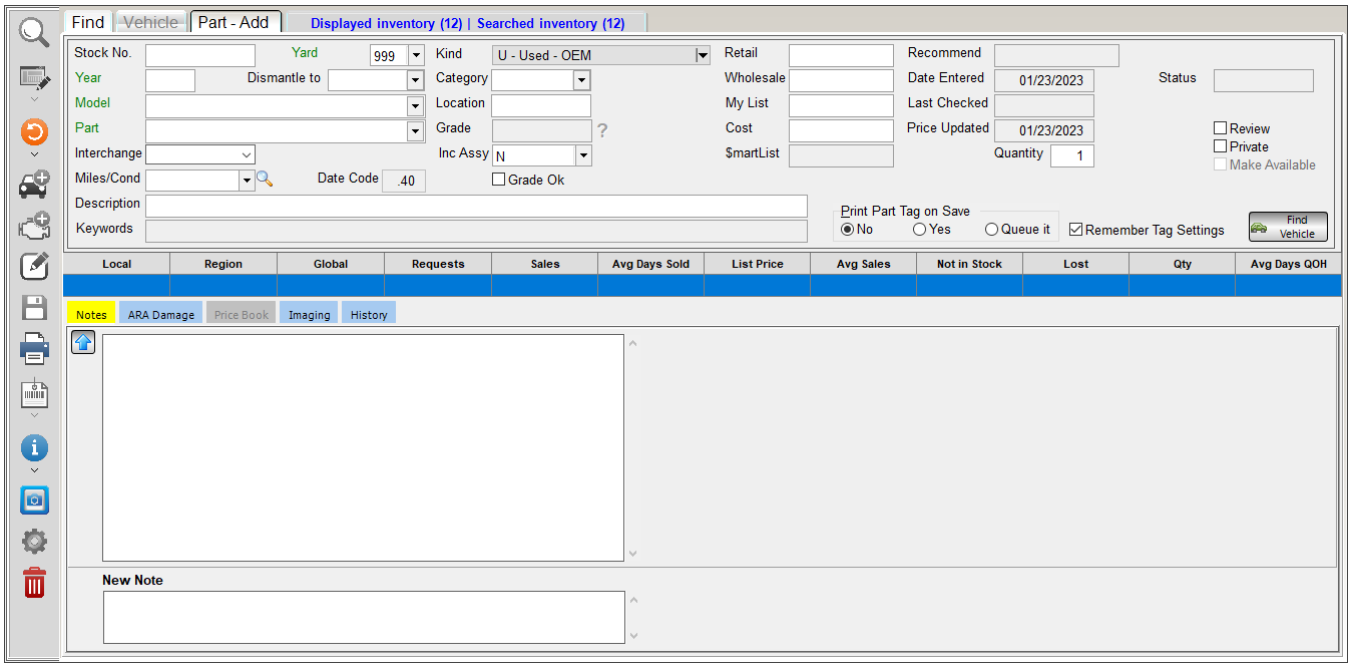
To add a loose part to your inventory, follow these steps:

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

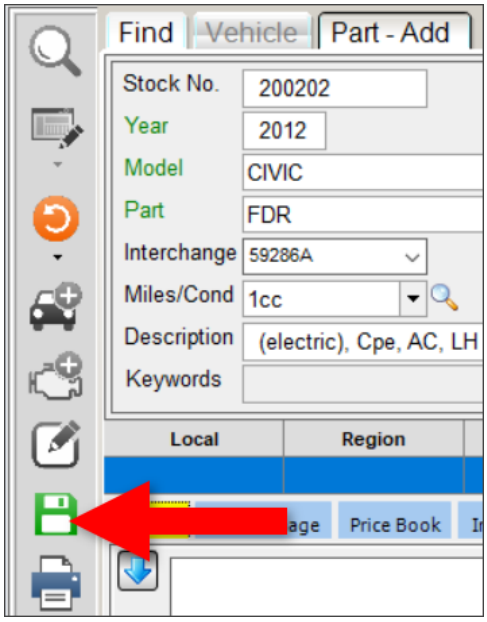


2. The **Part – Add** tab opens. Use this tab to add part information. For more info about this tab, refer to the **Part Tab** section of this guide.

   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.



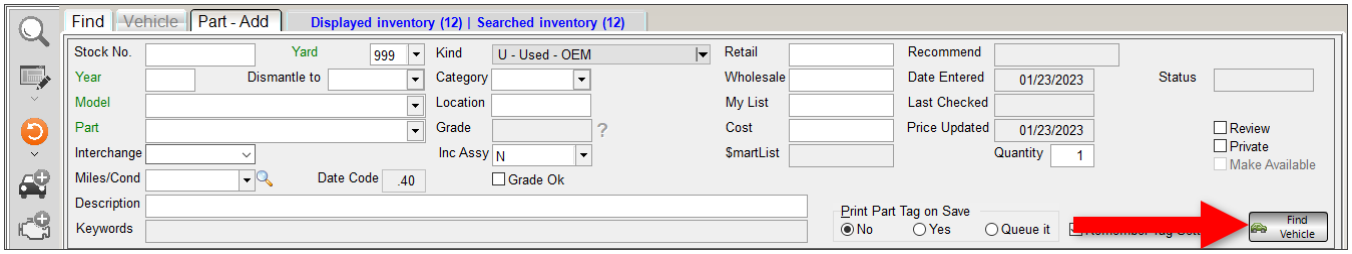
3. When you've finished putting in the part information, click the save button. The part is added to your inventory and displays in the parts grid on the **Find** tab.



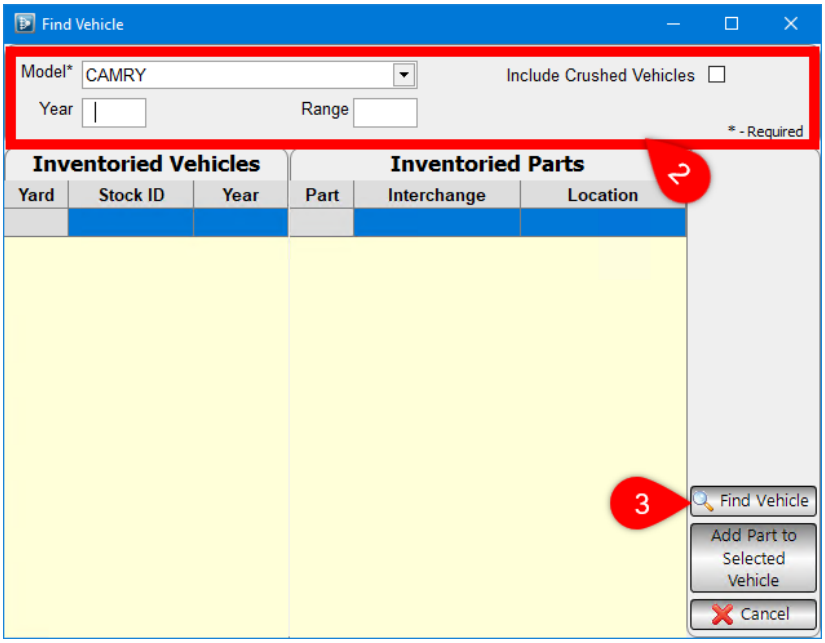
Find Vehicle

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**



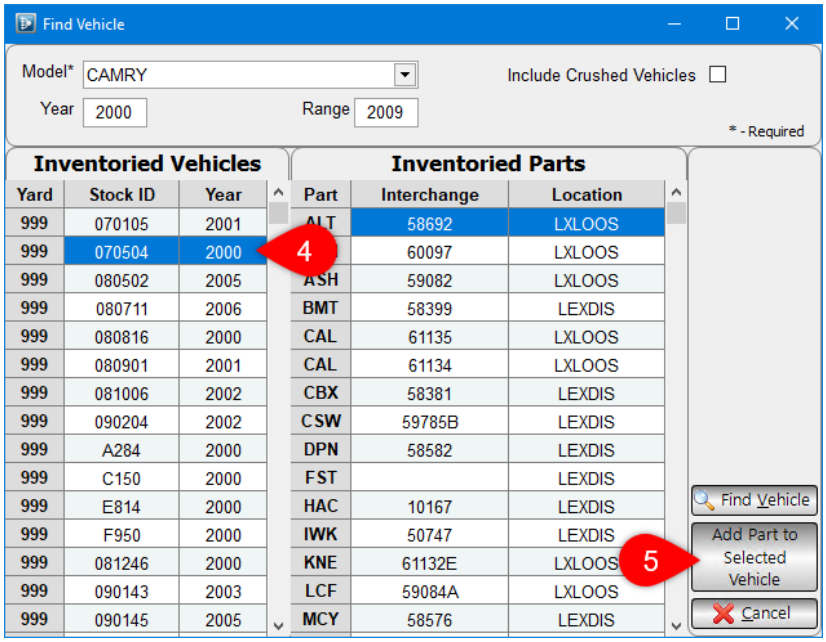
2. The **Find Vehicle** window opens. Put in your search criteria:
   a. Select a **Model** using the drop-down box.
   b. To narrow your results by year, type a **Year**. To search a range of years, type an ending year in the **Range** field.
   c. Check the **Include Crushed Vehicles** box if you want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



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

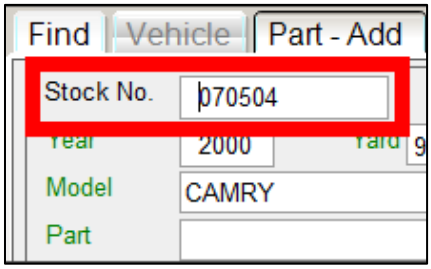
4. The **Inventoried Vehicles** column displays inventoried vehicles that match your search. Click to highlight a vehicle in the **Inventoried Vehicles** section, and the **Inventoried Parts** column displays the parts you currently have inventoried from that vehicle.

   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**.

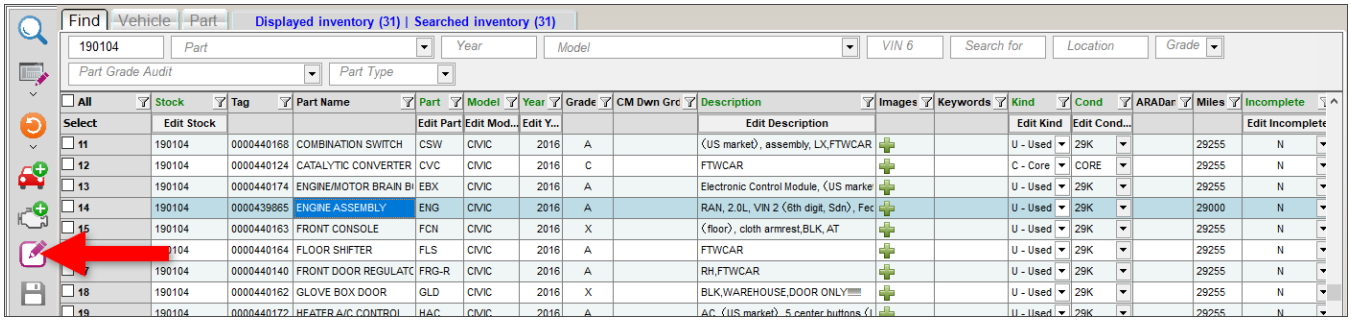
   The vehicle's stock number is now populated in the **Stock No.** field on the **Part – Add** tab. Now you can continue adding the loose part.



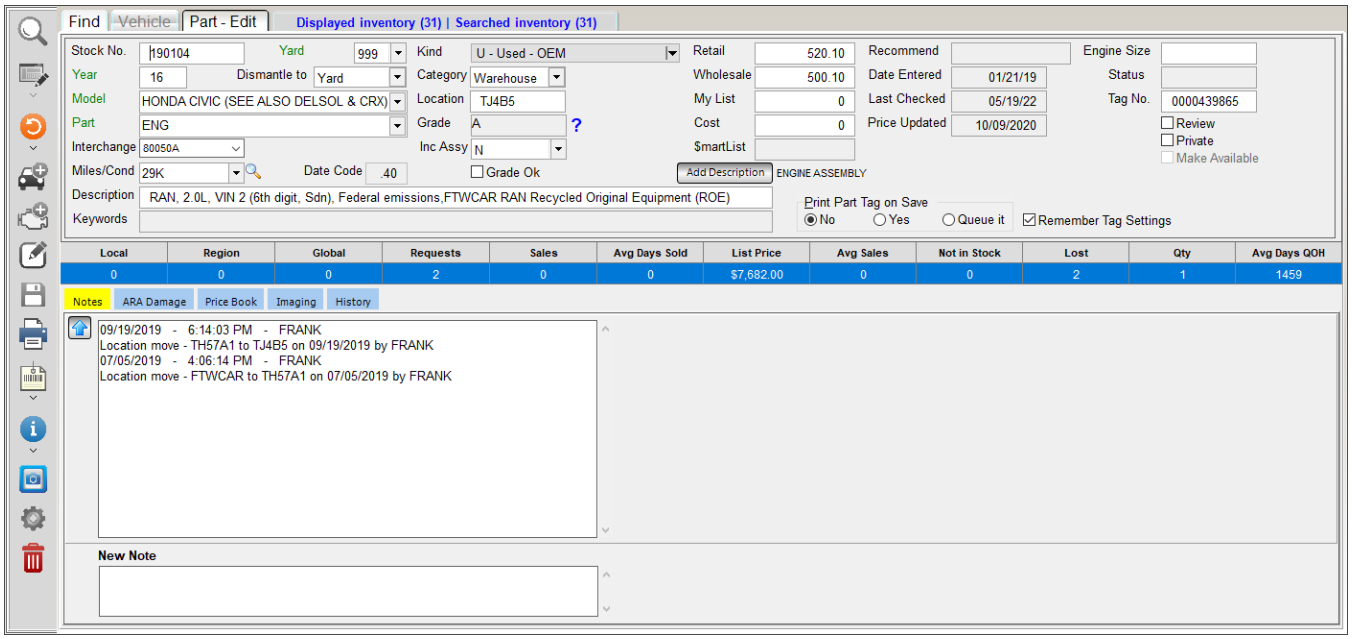
Editing a Part/Part Tab

To edit a part, follow these steps:

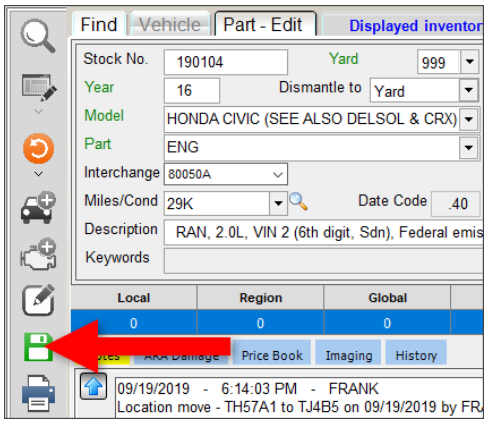
1. In your search results on the **Find** tab, locate the part you want to edit and double-click it. Or, click on it, and click the edit button.



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.

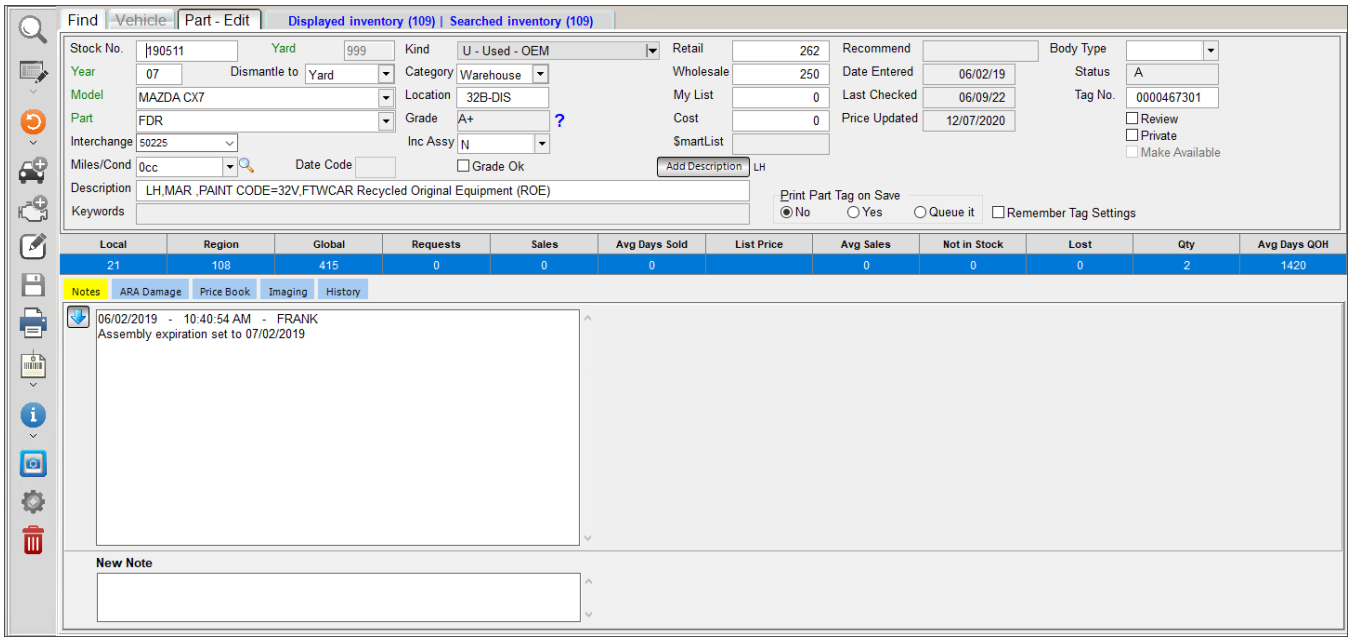
As you're working on this tab use the buttons on the left side of the tab to:

Print 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.

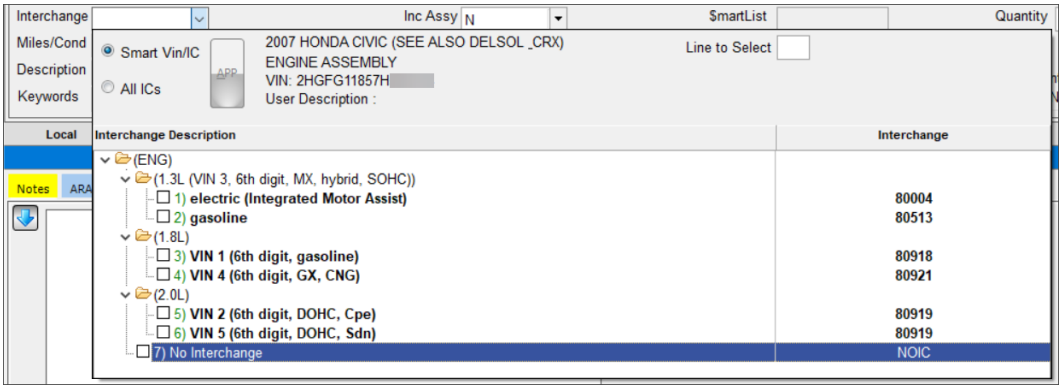
  If you're adding a part and the stock number does *not* match an AUT already existing in your inventory, you must manually fill out the **Year**, **Model**, and **Location** fields.

  ⚠ **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.

[*] If you need to edit the year for the main piece of an assembly because it was inventoried with the wrong year, Car-Part recommends that you do *not* edit the part on the **Part – Edit** screen. Instead, search for the assembly and components on the **Find** tab, and then bulk edit the main piece and component parts all at once.

- **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:
    - Click the checkbox for the interchange option you want to assign to this part

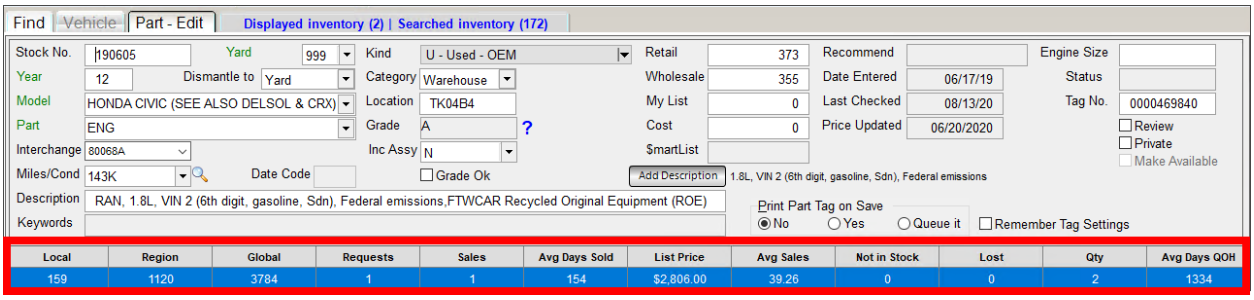
      or
    - In the **Line to Select** field, type the line number for the option you want to select and press **Enter**.



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

- Limit your **Interchange** choices by **SmartVin/IC*** (only applicable if there is a VIN associated with the vehicle this part is from). To see all interchange choices, select **All ICs**.
- View interchange application information for an interchange option, by clicking to highlight an option and then clicking the **APP** button. APP

Once an interchange option is selected, statistics for that option display on the blue bar in the middle of the screen.



* 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, sheet metal assemblies, and wheels: 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 .
    - Subjective parts (glass, lights, mirrors, cosmetic parts, seats, airbags, other – miscellaneous parts): If the part does *not* have damage, click the down arrow and select **000**.

      If the part *does* have damage, select **NIB** (for a B grade) or **NIQ** (for a C grade). If you aren't sure what grade it should be, click the blue question mark for grading guidance.

  For any part, you can 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)
    - **CORE** – Core part
    - **CHECK** – Needs to be checked
    - **UNKNWN** – Condition is unknown
- **Description** – Type a description for this part. Describe the part well and accurately (including any damage). 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.

  When adding a paint code to a part description, you can prevent Car-Part.com from interpreting a paint code as an ARA damage code by including **Paint Code=** before the code. (For example: **Paint Code=1G3**).*

  If an asterisk (*****) displays at the beginning of the part **Description**, that means this part is an assembly that has had a component added to a work order or deleted from inventory (and therefore, may be incomplete).
- **Keywords** – Words from the part description that caused Checkmate to downgrade or ungrade the part.
- **Yard** – If you have multiple yards, select the yard number.

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* Car-Part.com scans part descriptions of listings to adjust part grades, so be aware that listing the paint code in the description can cause Car-Part.com to re-grade a part inaccurately if the paint code is interpreted as a damage code. In the future, Car-Part.com will be updated so that including paint codes in descriptions with **Paint Code=** before the code, will not alter parts' grades.

- **Dismantle to** – Where you intend the part to go (**Warehouse**, **Yard**, or **Unbolted**) when it has been dismantled. This field is only relevant if you use Checkmate Report's Dismantling Instructions Report; it determines which group the part prints in on the report. *

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

  After the vehicle is dismantled, this field is irrelevant. At that point, update the **Category** and **Location** fields for the dismantled parts.

- **Word Grade List** – This field displays for subjective parts (glass, lights, mirrors, cosmetic parts, seats, airbags, other – miscellaneous parts). Use this field to select words you want to add to the part description. The part grade associated with the keyword displays next to the word.

- **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.

- **Kind** – Select the kind of part this is, such as **Rebuilt**, **Aftermarket**, etc. This field defaults to **U – Used OEM**.

- **Category** – Select the category for this part.

- **Location** – Type the part's location.

- **Grade** – Displays the grade of the part. When adding a part, the grade is not calculated until the part is saved. Thereafter, each time a part is edited, the grade updates when the part is saved.

  For information that explains how this part is graded, click the blue question mark.

- **Inc Assy** (Incomplete Assembly) – If this part is an assembly, indicate whether or not it is complete:
  - **N** – No, this assembly is *not incomplete* (i.e., it is complete)
  - **Y** – Yes, this assembly *is incomplete* (i.e., it is not complete). When an assembly is marked incomplete, it is ungraded.
  - **S** – Indicates that the system (Checkmate) has recognized an inconsistency and is awaiting your review. (Typically, you would not select **S**.)

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* This report describes what you want to be done with each of the parts for the dismantler. You can print a Dismantling Instructions report for a vehicle from inside Checkmate by opening Checkmate Reports, going to the **Inventory** tab, and running the **Dismantling Instructions Report**.

† The date code is configured in Checkmate Retro using the **Change Inventory Questions** function (Checkmate Full: **6,10,3** or Checkmate Classic: **S3,3** or Checkmate Junior: contact support.)

- **Grade Ok** – This field is for when there is inconsistent part information that will or has already caused Checkmate to put the part on an audit for you to review.
    - If you are editing a part already on an audit, check this box to indicate you have reviewed the part information, the information is correct, and the part's grade is appropriate. The part's grade will remain the same and the part will be removed from all audits.
    - If you are adding a part and believe Checkmate will put this part on an audit even though you know the part information is correct, you can check this box to keep the part from appearing on any audits. If you aren't sure, leave this box un-checked.
- **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.
- **My List** – If this is a non-used part (aftermarket, remanufactured, or new OEM), type the price your business considers to be your own list price. Estimating systems use a List Price for aftermarket, OEM discount, and remanufactured part kinds (basically any part kind that does not get classified on the estimating system as a recycled part). This is the price the insurance company pays the shop for the part. Note: Shops expect to buy the part for a discounted amount of My List (e.g. the value in your Retail or Wholesale field). Populating this price may help you in the future to better sell these parts into the collision repair industry.
- **Cost** – If this is a non-used part, type the cost of the part.
- **$martList** – If the part was inventoried through Partmate and has one or more $martList recommendations, displays the $martList result(s) of the part. (If text is cut off, see the full text by hovering your cursor over the $martList field.)
- **Recommend** – Checkmate's recommendation for this part regarding price or stock level. This is determined by your inventory data and sales and request history.
- **Date Entered** – Date the part was inventoried.
- **Last Checked** – Date the part was last edited.
- **Price Updated** – Date the part's retail or wholesale price was last updated.
- **Quantity** – This field only shows if you're adding a part. Type how many of this exact loose part you are adding. This is the number of part records that will be created when you save the part.
- **Status** – Status of the part.
- **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 applicable).
    - 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
- **Remember Tag Settings** – Check this box to set whatever option is selected for **Print Part Tag on Save** as the default option whenever a part is added.

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.

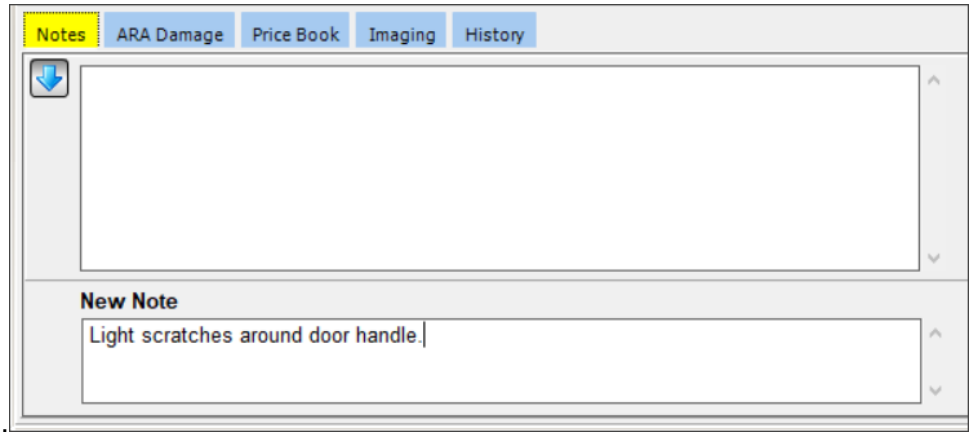
When you've finished adding or editing the part, click the save button.

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.
- To toggle the sort order of the notes, click the blue arrow button.

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

On the **ARA Damage** tab you can assign ARA damage codes to parts with point-and-click graphics. You can also type the damage code directly into the damage fields.

For body parts, sheet metal assemblies, and wheels, the part's grade updates according to the amount of damage (grade is updated when changes are saved).

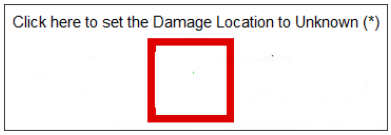
⚠ **Note:** This tab is not available for mechanical parts.

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.

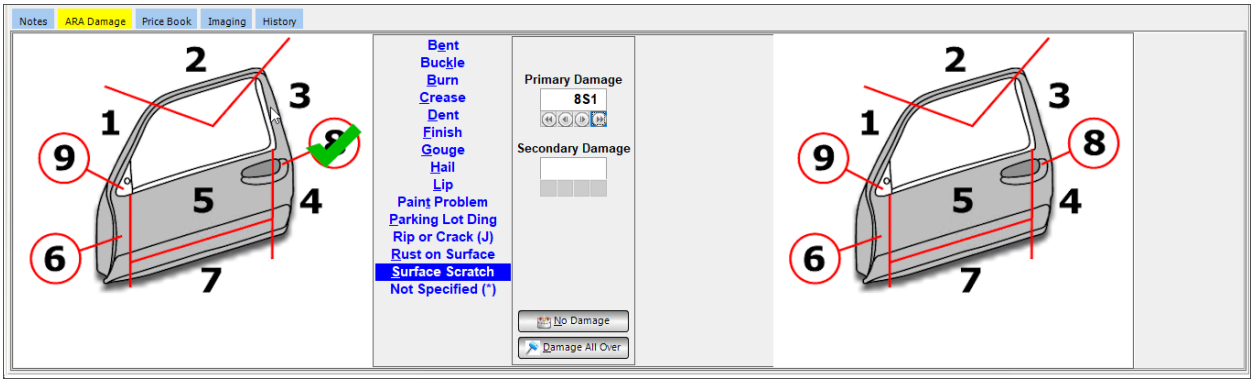
   ⚠ **Note:** If there are multiple damage images available, the **Next Image** button displays. Click it to see images for different body styles.

   If there is no damage image displayed, click inside the red box to set the damage location to unknown (*).

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.

   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.

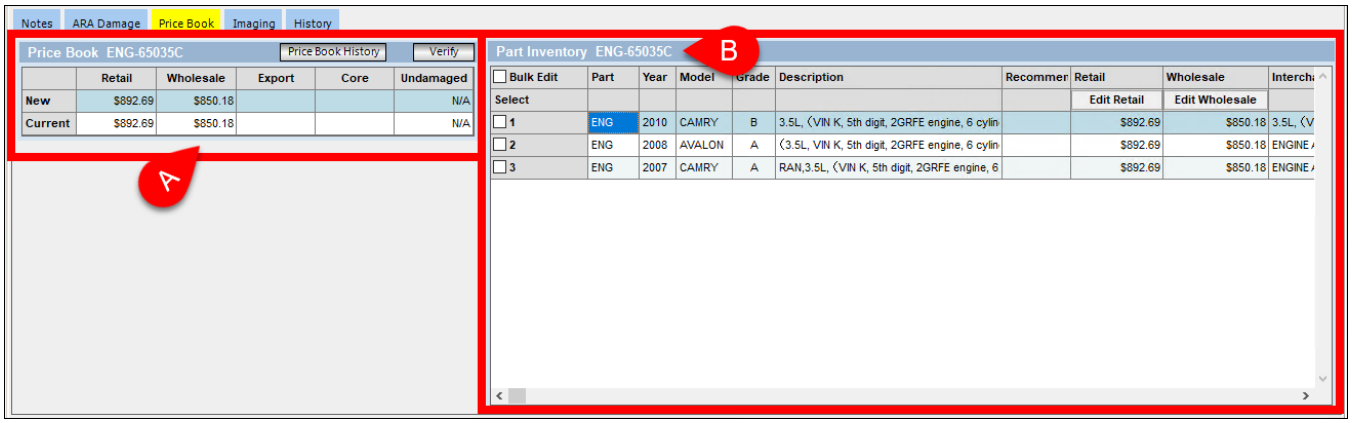
   If needed, you can click **No Damage** to reset this part to zero damage.
5. When you're finished on this tab, continue working on the other tabs, or click the save button to save your work and return to the **Find** tab.

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 code*:

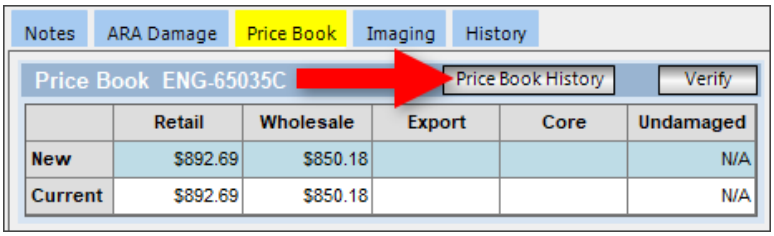
- The date code populates as the cents value if you type any price on this tab with just a dollar amount and no cents value.
- The date code does not populate as the cents value of a price if the price you enter includs a cents value.

* The date code is configured in Checkmate Retro using the **Change Inventory Questions** function (Checkmate Full: **6,10,3** or Checkmate Classic: **S3,3** or Checkmate Junior: contact support.)

Editing the Price Book

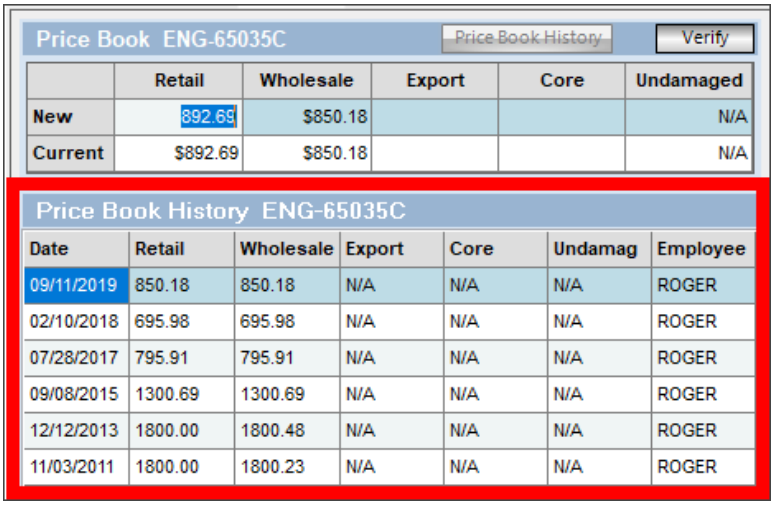
On the **Price Book** tab, the **Price Book** section displays Price Book prices for the interchange option that's selected for the part you're adding or editing.

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



	Retail	Wholesale	Export	Core	Undamaged
New	$892.69	$850.18			N/A
Current	$892.69	$850.18			N/A

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

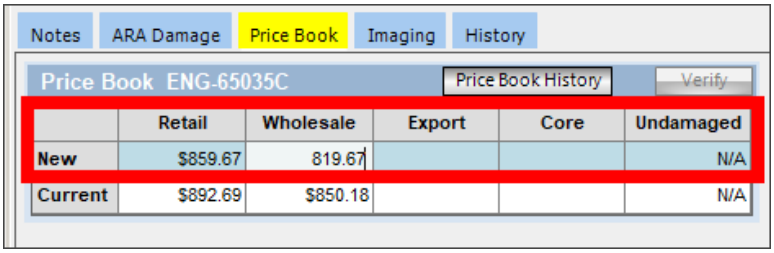


	Retail	Wholesale	Export	Core	Undamaged
New	892.69	$850.18			N/A
Current	$892.69	$850.18			N/A

Price Book History ENG-65035C

Date	Retail	Wholesale	Export	Core	Undamag	Employee
09/11/2019	850.18	850.18	N/A	N/A	N/A	ROGER
02/10/2018	695.98	695.98	N/A	N/A	N/A	ROGER
07/28/2017	795.91	795.91	N/A	N/A	N/A	ROGER
09/08/2015	1300.69	1300.69	N/A	N/A	N/A	ROGER
12/12/2013	1800.00	1800.48	N/A	N/A	N/A	ROGER
11/03/2011	1800.00	1800.23	N/A	N/A	N/A	ROGER

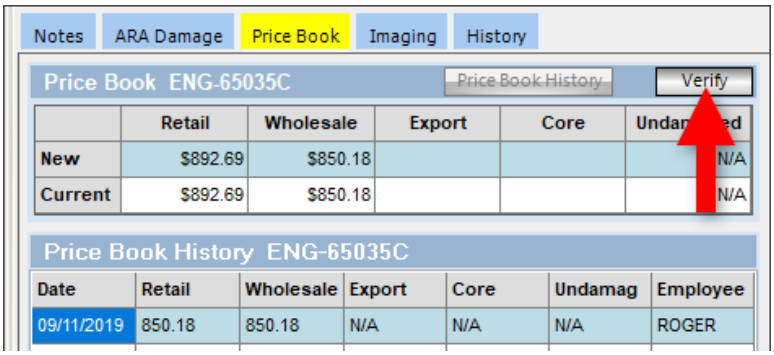
- To edit the current Price Book prices, click inside the **Retail**, **Wholesale**, **Export**[*], **Core** and **Undamaged** (body parts only) fields and type the **New** price(s).



	Retail	Wholesale	Export	Core	Undamaged
New	$859.67	819.67			N/A
Current	$892.69	$850.18			N/A

[*] The **Export** field is not commonly used. If you set an **Export** price in your **Price Book**, it will be saved in the **Price Book** only; the **Export** price does not appear on Car-Part.com marketplaces.

- 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**.



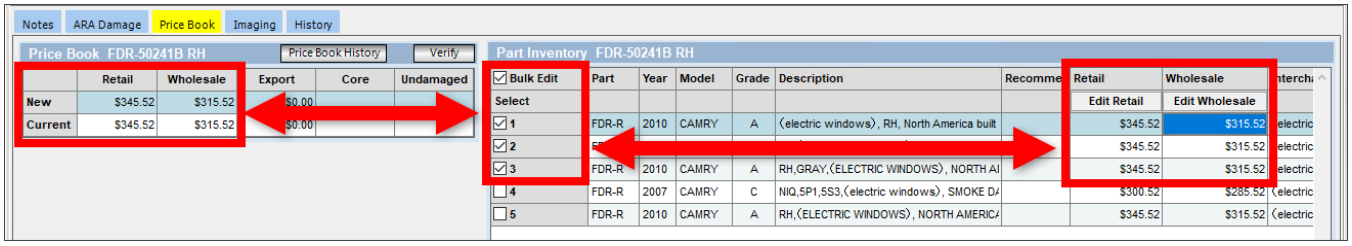
Price Book – Editing Part Inventory

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.

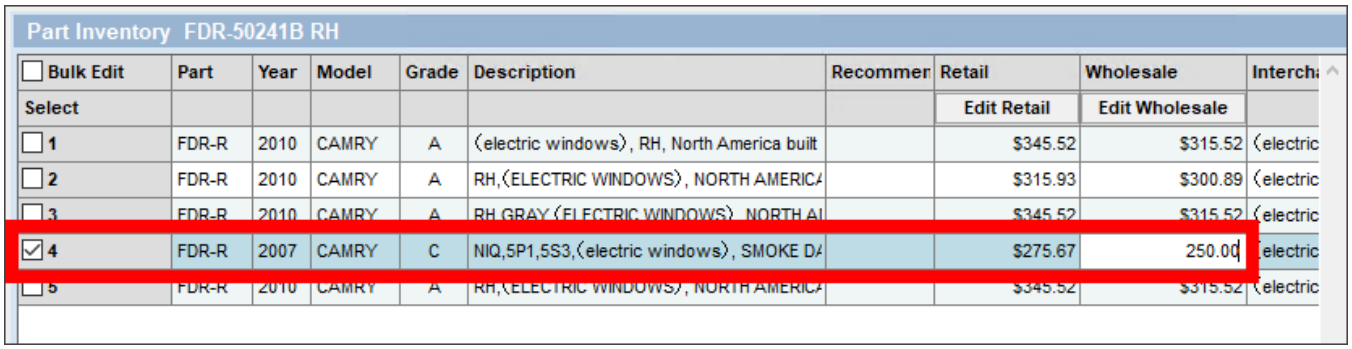
⚠ **Note:** The first part listed in the **Part Inventory** section is the part that is currently being added/edited in the top part of the **Part** tab. Any pricing changes made in the top of the **Part** tab are reflected in the **Part Inventory** section and vice versa.

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

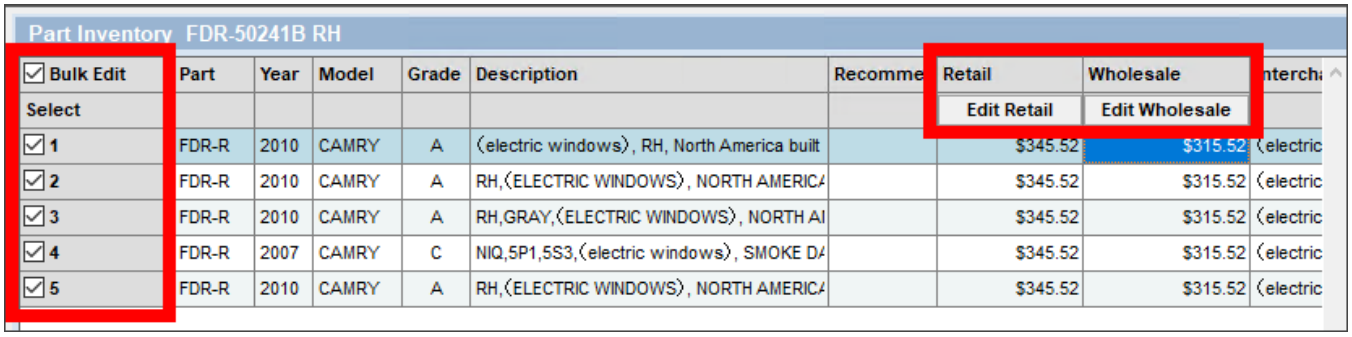
- Apply Price Book prices – Set the prices of parts in your inventory to your Price Book prices by checking the boxes in the **Select** column for each part you want to update. The prices for this part will be updated when you click save.



- 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.



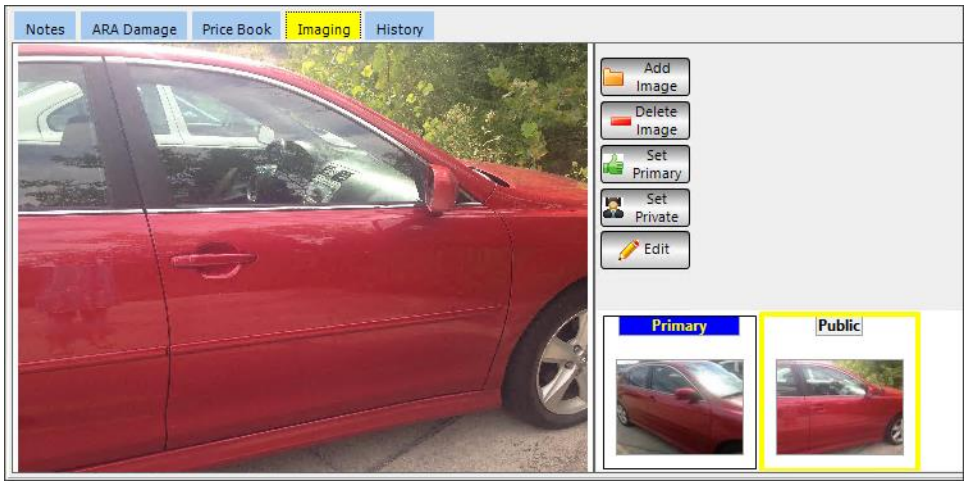
- Bulk edit part prices – Make bulk edits to part prices by selecting parts to edit and then clicking **Edit Retail** or **Edit Wholesale**. For more info, refer to the **Bulk Edit Retail, Wholesale, or My List Price** section of this guide.



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.
- **Edit** – Edit the selected image. For more info about editing images, refer to the section of this guide called: **Image Editor**.

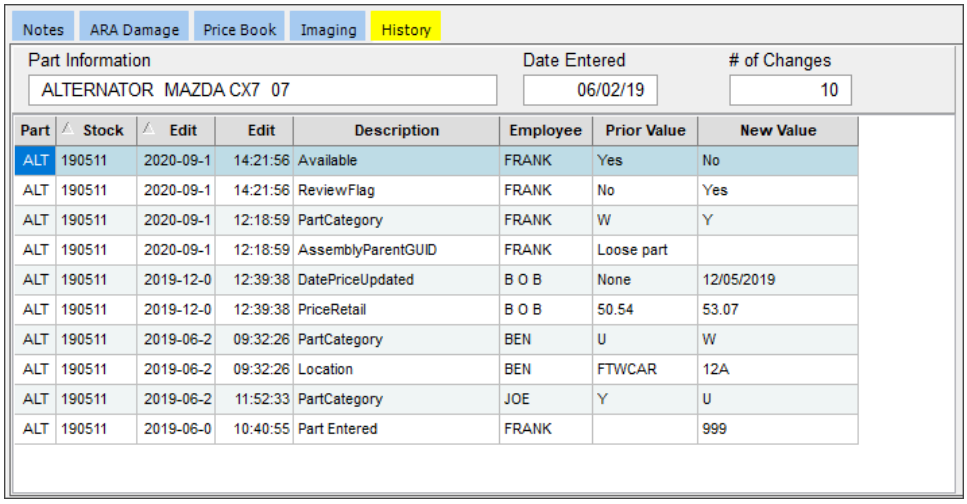


⚠ **Notes:** You can drag and drop images from your hard drive into the **Imaging** tab to associate them with the vehicle. To add multiple images at one time using this method, hold down the **Ctrl** key while selecting the images and then drag them into this tab.

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.



Part	Stock	Edit	Edit	Description	Employee	Prior Value	New Value
ALT	190511	2020-09-1	14:21:56	Available	FRANK	Yes	No
ALT	190511	2020-09-1	14:21:56	ReviewFlag	FRANK	No	Yes
ALT	190511	2020-09-1	12:18:59	PartCategory	FRANK	W	Y
ALT	190511	2020-09-1	12:18:59	AssemblyParentGUID	FRANK	Loose part	
ALT	190511	2019-12-0	12:39:38	DatePriceUpdated	B O B	None	12/05/2019
ALT	190511	2019-12-0	12:39:38	PriceRetail	B O B	50.54	53.07
ALT	190511	2019-06-2	09:32:26	PartCategory	BEN	U	W
ALT	190511	2019-06-2	09:32:26	Location	BEN	FTWCAR	12A
ALT	190511	2019-06-2	11:52:33	PartCategory	JOE	Y	U
ALT	190511	2019-06-0	10:40:55	Part Entered	FRANK		999

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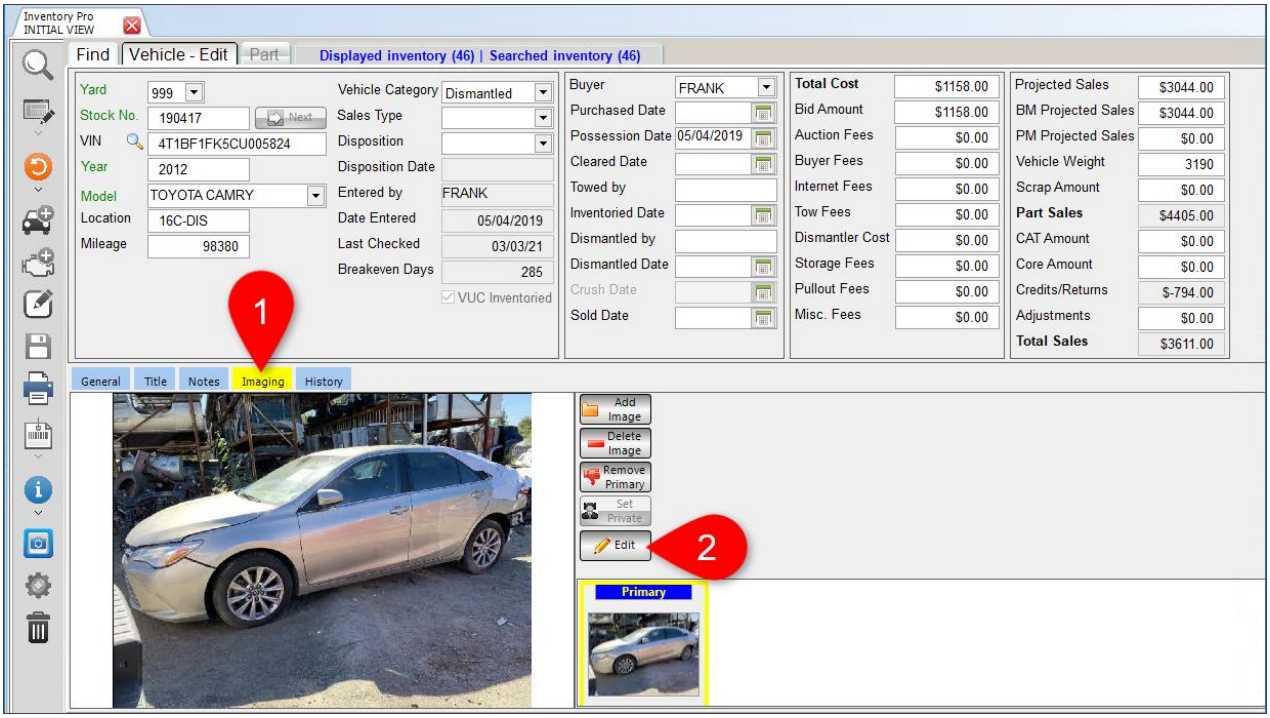
Image Editor

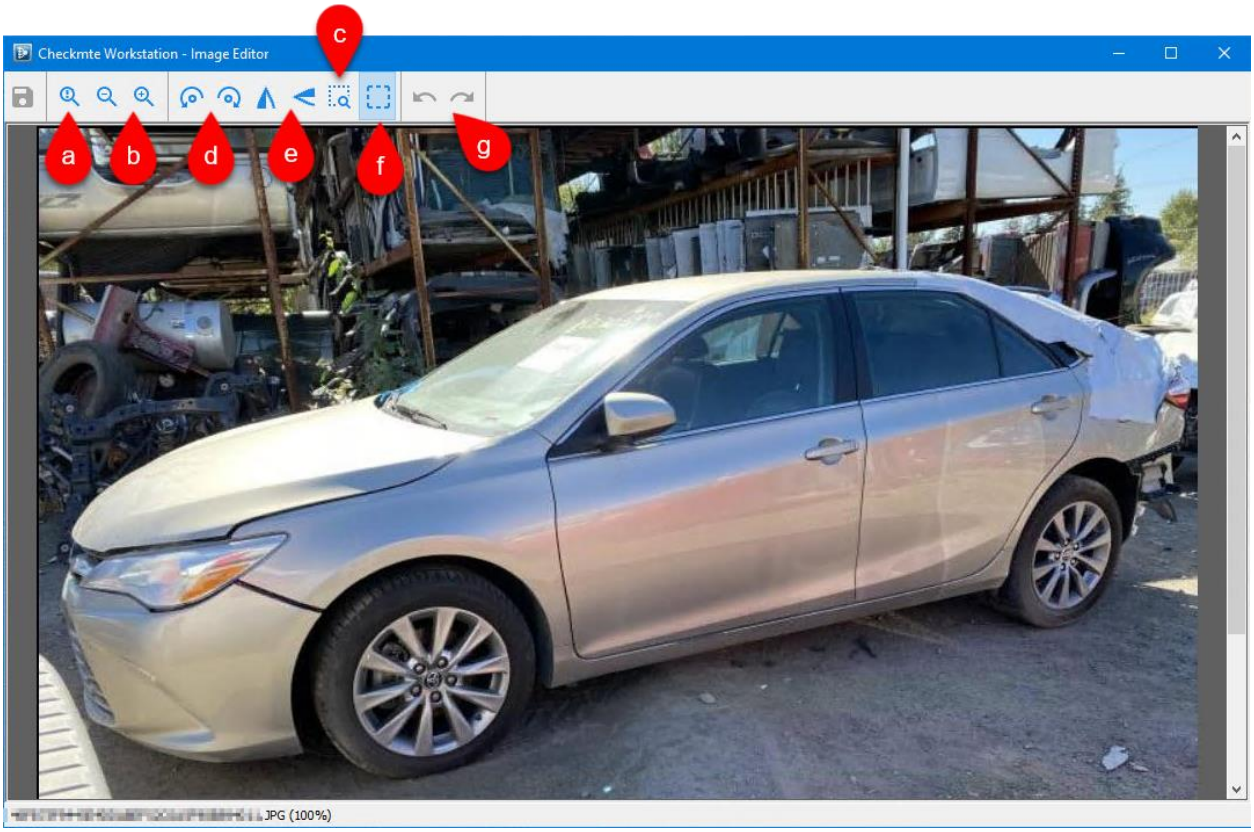
The **Image Editor** window lets you crop, rotate, or flip images directly in Checkmate. You can access this feature from either the **Vehicle** tab, or the **Part** tab.

To use this feature:

1. When you're editing a part or vehicle, go to the **Imaging** tab to see any part images.
2. Click to select the image you want to work on, and then click **Edit** to open the **Image Editor** window.



3. Use the buttons at the top of **Image Editor** to change your view or edit the image.



The following buttons change your zoom in **Image Editor** (using these buttons changes your view of the image within this window; they do not alter the image):

a. Toggle between fitted to screen and max size
b. Zoom out/Zoom in
c. Zoom in on a selected area

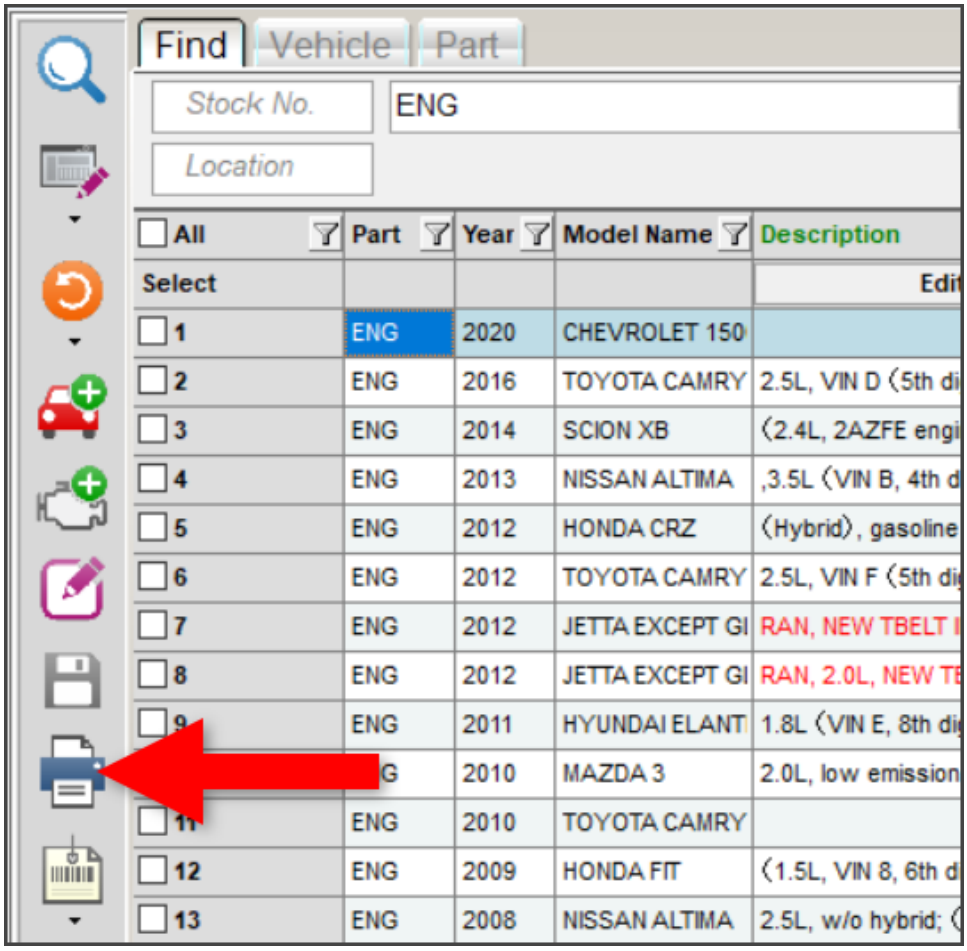
The following buttons alter the image:

d. Rotate counter-clockwise/Rotate clockwise
e. Flip horizontally/Flip vertically
f. Crop (Use your cursor to select the area you wish to keep. Then right-click, and select **Crop**)
g. Undo last edit/Redo last edit

4. Click the save button when you are finished editing.

Printing Parts on the Find Tab

On the **Find** tab in Inventory Pro, you can print a report of the parts displayed on the tab by clicking the printer button.



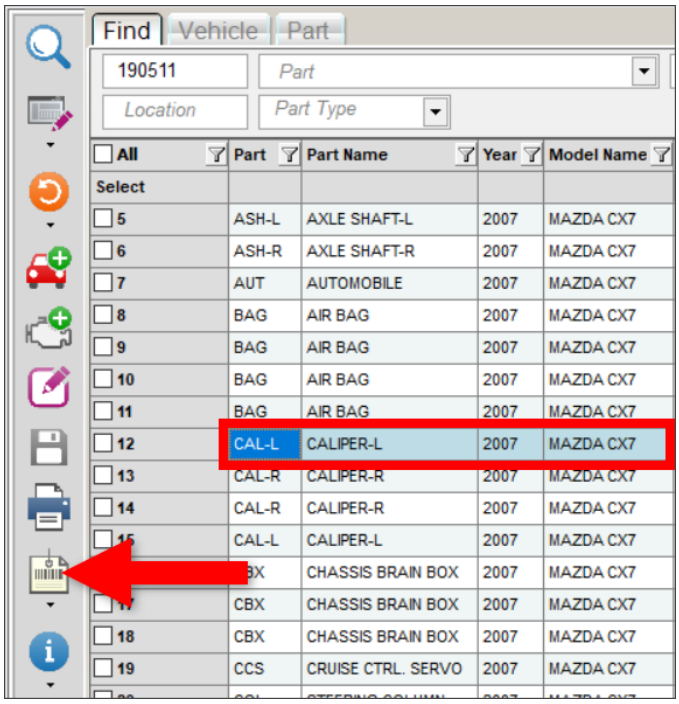
Printing Part Tags/Adding Parts to the Tag Queue

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

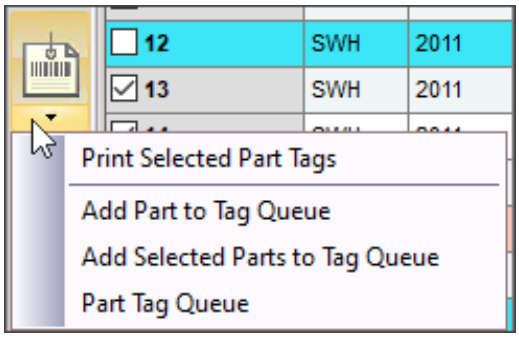
⚠ **Note:** Add or edit your part tag printer by going to ***Settings>Workstation*** and clicking the **Printers** tab.

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:

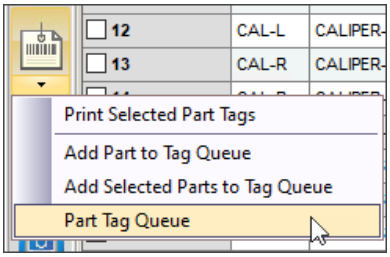
- Click the tag button to immediately print a tag for the part you're adding or editing.
- Click the down arrow on the tag button and select **Add Part to Tag Queue** to add the part to the tag queue to print later.

For more information about the part tag queue, refer to the **Part Tag Queue** section of this guide.

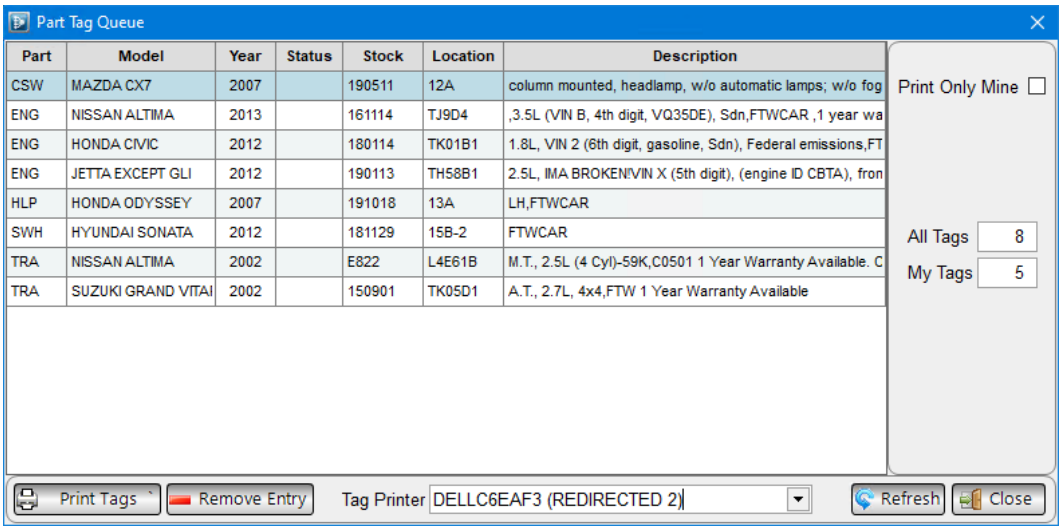
Part Tag Queue

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.

Print Part Tags to Multiple Tag Printers

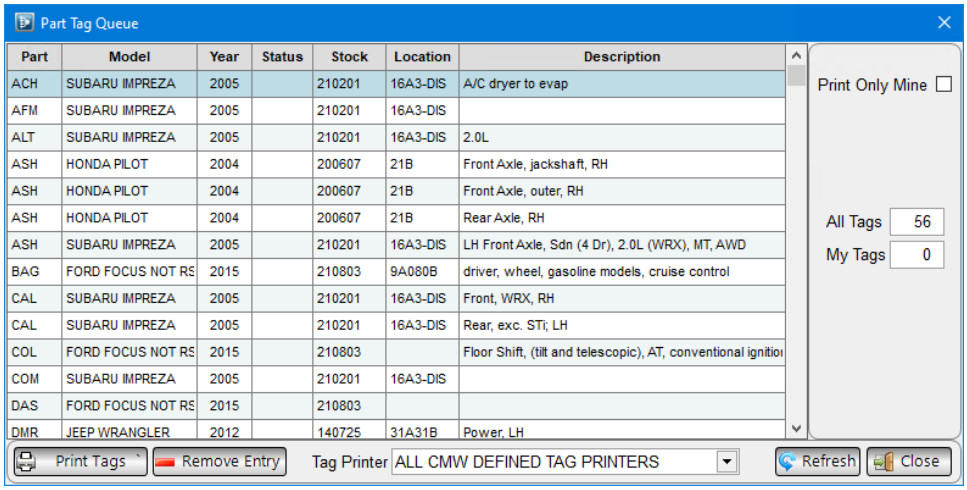
In Checkmate, you can print 2 tags for parts by printing to 2 tag printers at once.

⚠ **Note:** In order to print part tags to two printers, your Checkmate settings must be set to use universal tags and the second tag printer must be added to your Checkmate server. If you want to use this feature, please contact your Checkmate support tech to complete the necessary setup.

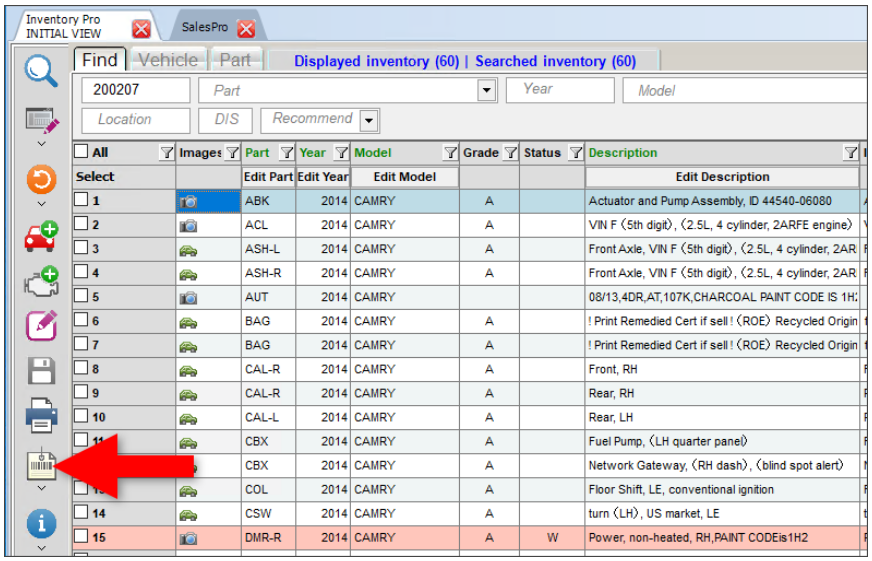
Once you have your second tag printer set up, you can print tags to both printers.

On the **Part Tag Queue** window, you can select a tag printer in the **Tag Printer** field. In this field, make your selection based on how many tags you want to print for each part:

- Print 2 tags for each part – Leave the default **ALL CMW DEFINED TAG PRINTERS** option. When you click **Print Tags**, both printers will print a tag for each part.
- Print 1 tag for each part – Click the **Tag Printer** down arrow and select the printer you want. When you click **Print Tags**, only the selected printer will print a tag for each part.



If you are set up to print tags on 2 printers, when you click directly on the tag button in Inventory Pro (not on the down arrow), 2 tags will print for the selected part, 1 on each tag printer you have set up.

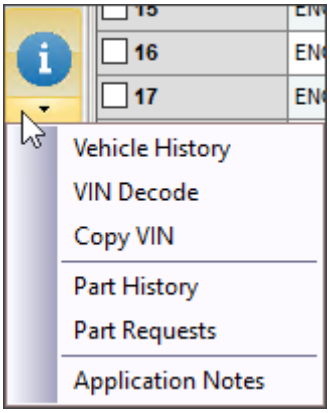


Part and Vehicle Information

When you're working in Inventory Pro, 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.)

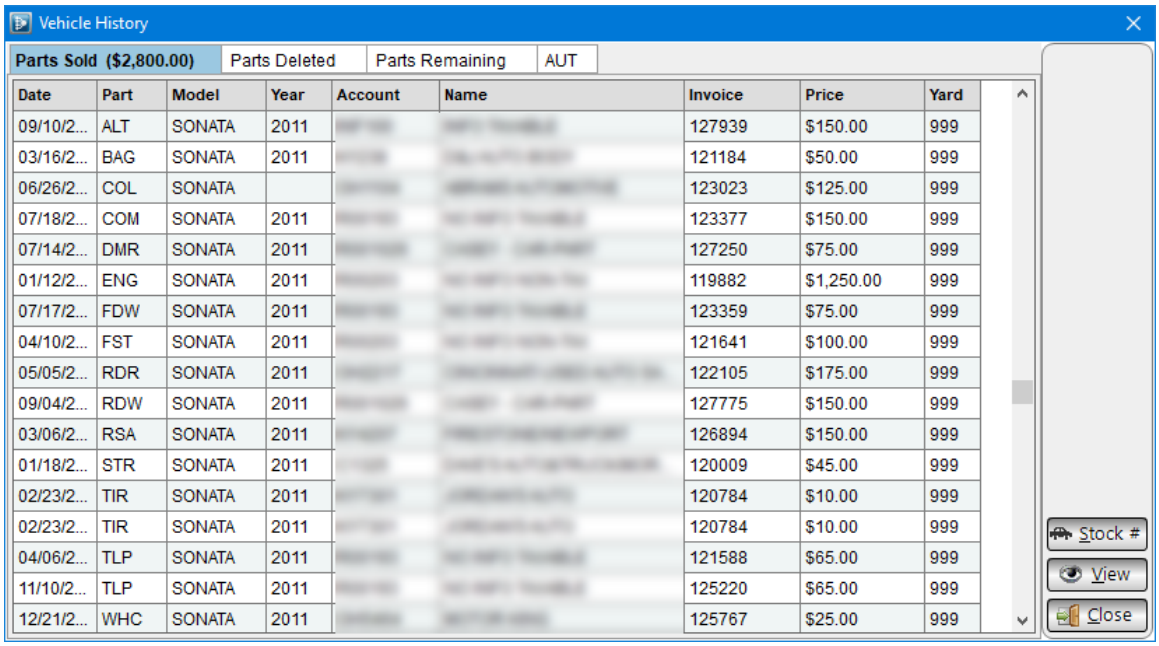


Vehicle History

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.



Date	Part	Model	Year	Account	Name	Invoice	Price	Yard
09/10/2...	ALT	SONATA	2011			127939	$150.00	999
03/16/2...	BAG	SONATA	2011			121184	$50.00	999
06/26/2...	COL	SONATA				123023	$125.00	999
07/18/2...	COM	SONATA	2011			123377	$150.00	999
07/14/2...	DMR	SONATA	2011			127250	$75.00	999
01/12/2...	ENG	SONATA	2011			119882	$1,250.00	999
07/17/2...	FDW	SONATA	2011			123359	$75.00	999
04/10/2...	FST	SONATA	2011			121641	$100.00	999
05/05/2...	RDR	SONATA	2011			122105	$175.00	999
09/04/2...	RDW	SONATA	2011			127775	$150.00	999
03/06/2...	RSA	SONATA	2011			126894	$150.00	999
01/18/2...	STR	SONATA	2011			120009	$45.00	999
02/23/2...	TIR	SONATA	2011			120784	$10.00	999
02/23/2...	TIR	SONATA	2011			120784	$10.00	999
04/06/2...	TLP	SONATA	2011			121588	$65.00	999
11/10/2...	TLP	SONATA	2011			125220	$65.00	999
12/21/2...	WHC	SONATA	2011			125767	$25.00	999

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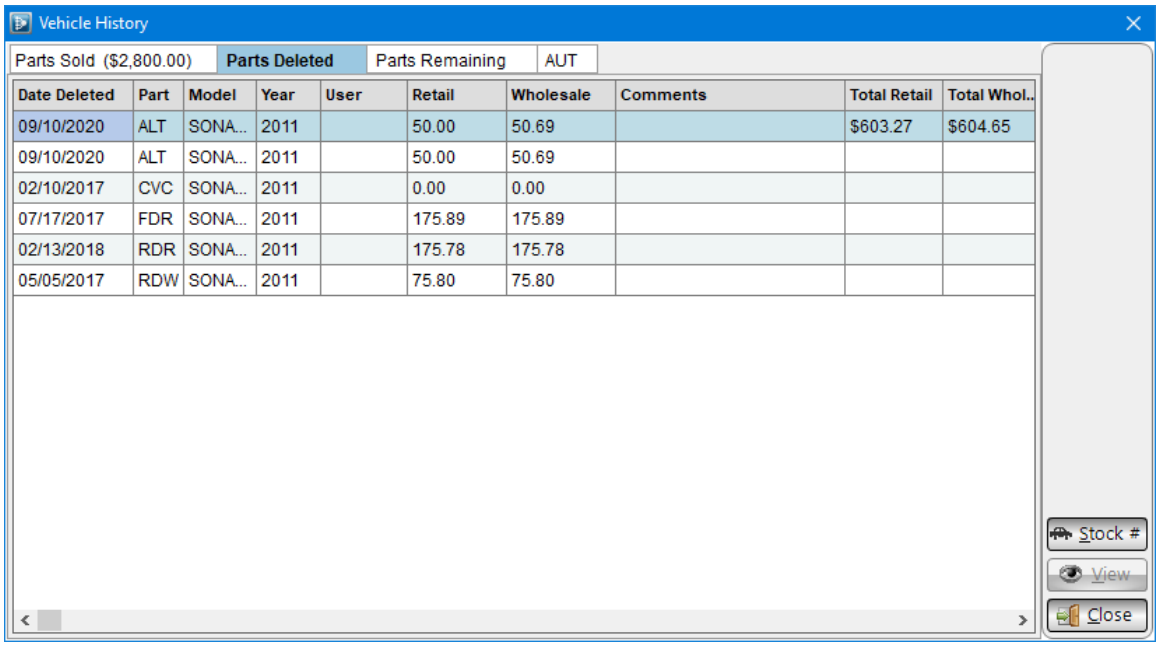
Parts Deleted

The **Parts Deleted** tab lists the parts from this vehicle that have been deleted from your inventory.



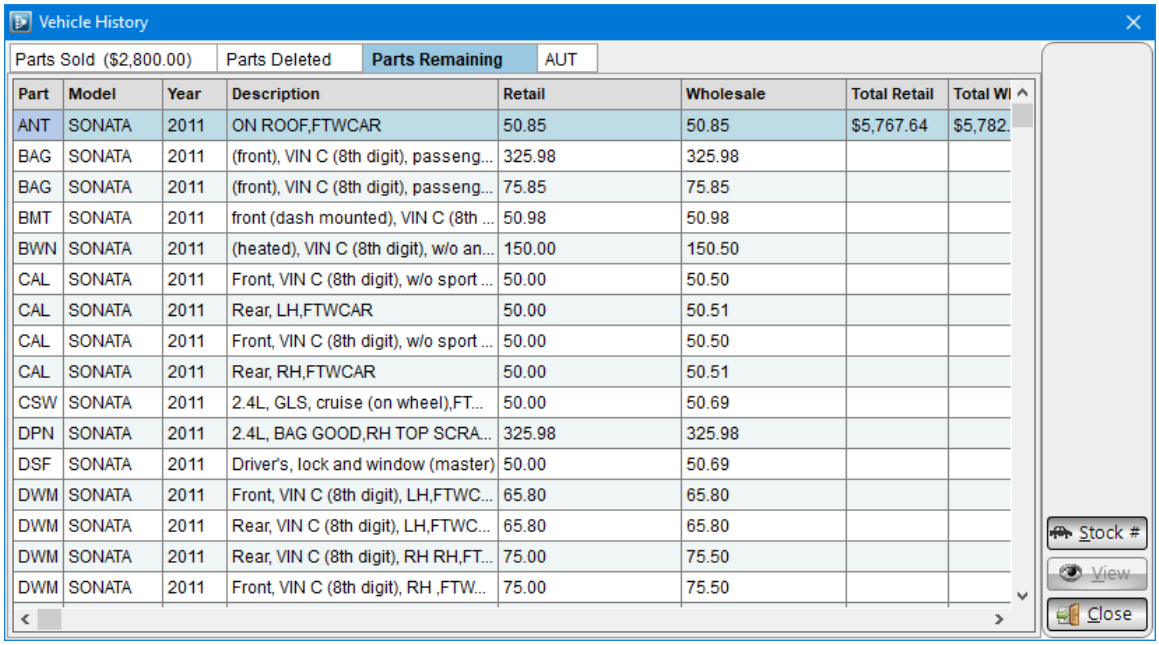
Date Deleted	Part	Model	Year	User	Retail	Wholesale	Comments	Total Retail	Total Whol..
09/10/2020	ALT	SONA...	2011		50.00	50.69		$603.27	$604.65
09/10/2020	ALT	SONA...	2011		50.00	50.69			
02/10/2017	CVC	SONA...	2011		0.00	0.00			
07/17/2017	FDR	SONA...	2011		175.89	175.89			
02/13/2018	RDR	SONA...	2011		175.78	175.78			
05/05/2017	RDW	SONA...	2011		75.80	75.80			

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.

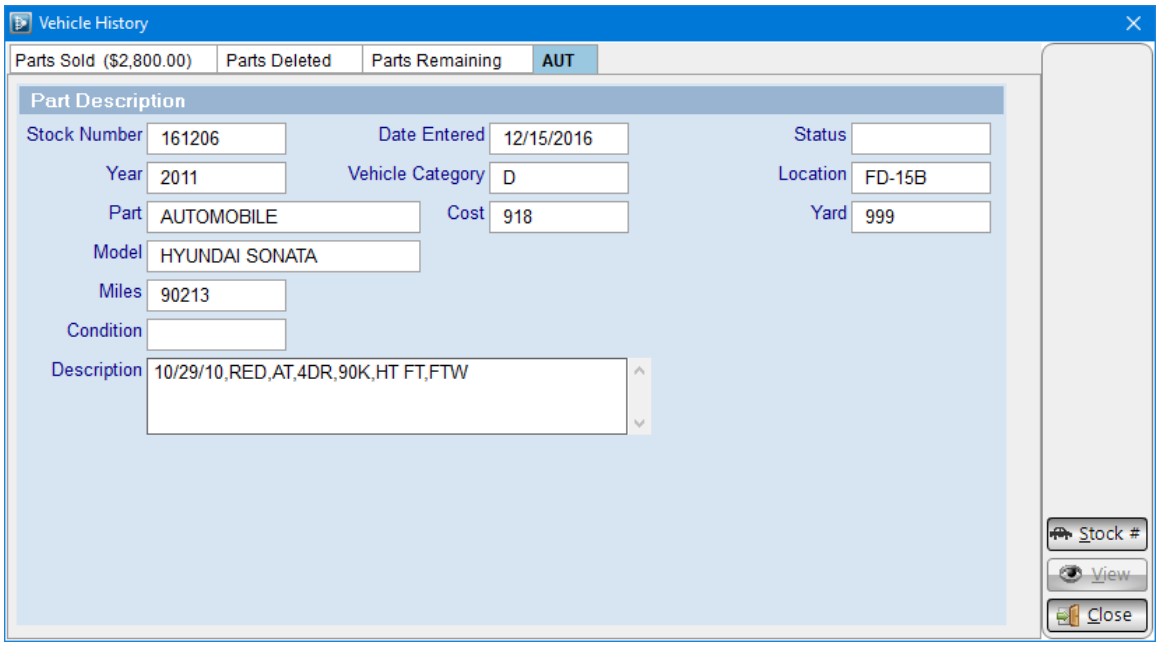
⚠ **Warning!** Clicking the **Stock #** button completely replaces any search results that were previously showing on the **Find** tab.



Part	Model	Year	Description	Retail	Wholesale	Total Retail	Total Wl
ANT	SONATA	2011	ON ROOF,FTWCAR	50.85	50.85	$5,767.64	$5,782.
BAG	SONATA	2011	(front), VIN C (8th digit), passeng...	325.98	325.98		
BAG	SONATA	2011	(front), VIN C (8th digit), passeng...	75.85	75.85		
BMT	SONATA	2011	front (dash mounted), VIN C (8th ...	50.98	50.98		
BWN	SONATA	2011	(heated), VIN C (8th digit), w/o an...	150.00	150.50		
CAL	SONATA	2011	Front, VIN C (8th digit), w/o sport ...	50.00	50.50		
CAL	SONATA	2011	Rear, LH,FTWCAR	50.00	50.51		
CAL	SONATA	2011	Front, VIN C (8th digit), w/o sport ...	50.00	50.50		
CAL	SONATA	2011	Rear, RH,FTWCAR	50.00	50.51		
CSW	SONATA	2011	2.4L, GLS, cruise (on wheel),FT...	50.00	50.69		
DPN	SONATA	2011	2.4L, BAG GOOD,RH TOP SCRA...	325.98	325.98		
DSF	SONATA	2011	Driver's, lock and window (master)	50.00	50.69		
DWM	SONATA	2011	Front, VIN C (8th digit), LH,FTWC...	65.80	65.80		
DWM	SONATA	2011	Rear, VIN C (8th digit), LH,FTWC...	65.80	65.80		
DWM	SONATA	2011	Rear, VIN C (8th digit), RH RH,FT...	75.00	75.50		
DWM	SONATA	2011	Front, VIN C (8th digit), RH ,FTW...	75.00	75.50		

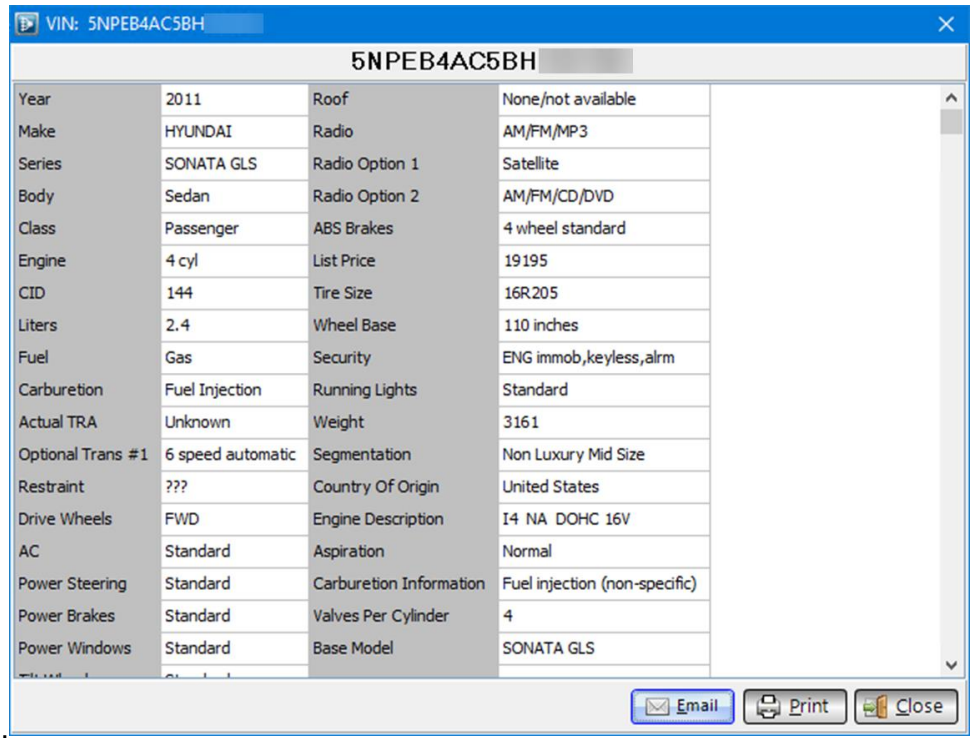
AUT

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

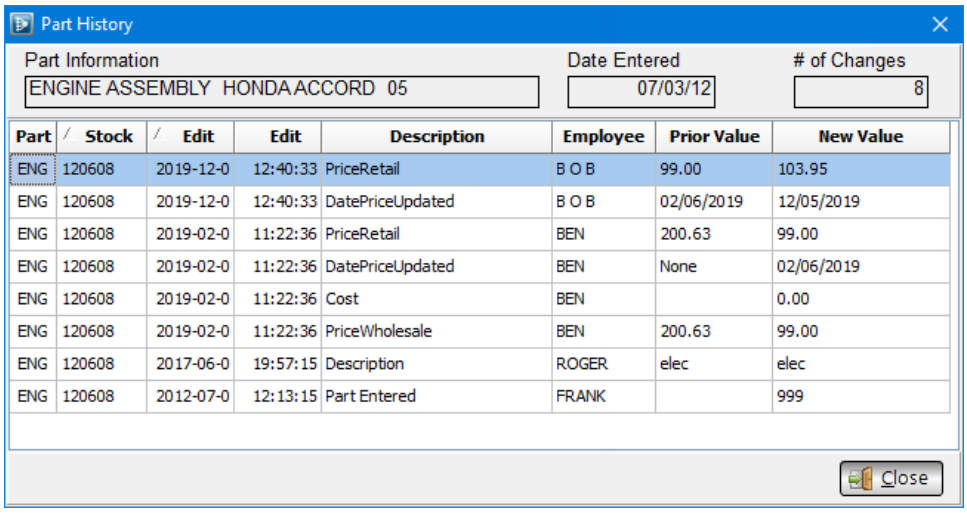
The **VIN:** decode window displays information that is able to be determined about a vehicle based on the VIN. Use the buttons at the bottom of the window to **Email** or **Print** VIN decode information. Click **Close** to close this window.



Year	2011	Roof	None/not available
Make	HYUNDAI	Radio	AM/FM/MP3
Series	SONATA GLS	Radio Option 1	Satellite
Body	Sedan	Radio Option 2	AM/FM/CD/DVD
Class	Passenger	ABS Brakes	4 wheel standard
Engine	4 cyl	List Price	19195
CID	144	Tire Size	16R205
Liters	2.4	Wheel Base	110 inches
Fuel	Gas	Security	ENG immob,keyless,alrm
Carburetion	Fuel Injection	Running Lights	Standard
Actual TRA	Unknown	Weight	3161
Optional Trans #1	6 speed automatic	Segmentation	Non Luxury Mid Size
Restraint	???	Country Of Origin	United States
Drive Wheels	FWD	Engine Description	I4 NA DOHC 16V
AC	Standard	Aspiration	Normal
Power Steering	Standard	Carburetion Information	Fuel injection (non-specific)
Power Brakes	Standard	Valves Per Cylinder	4
Power Windows	Standard	Base Model	SONATA GLS

Part History

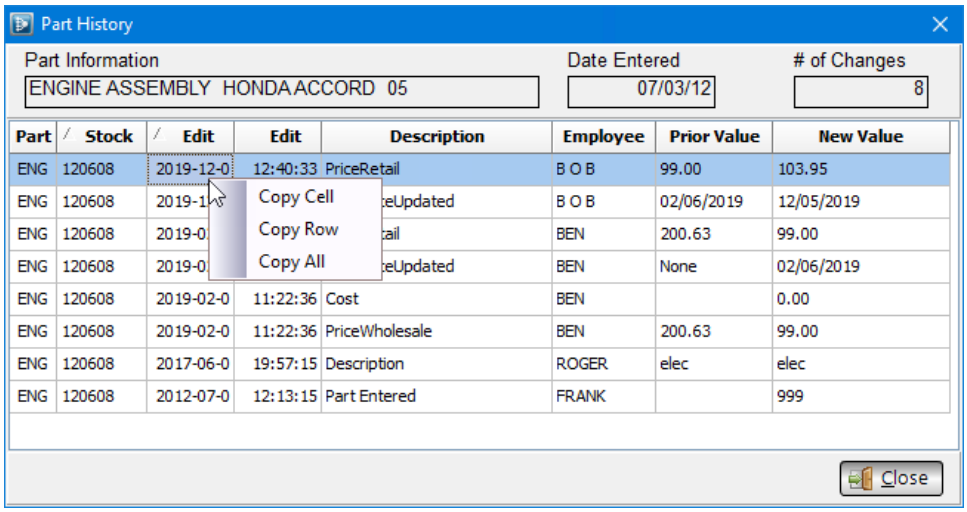
The **Part History** window displays a part's edit history.



Part	Stock	Edit	Edit	Description	Employee	Prior Value	New Value
ENG	120608	2019-12-0	12:40:33	PriceRetail	B O B	99.00	103.95
ENG	120608	2019-12-0	12:40:33	DatePriceUpdated	B O B	02/06/2019	12/05/2019
ENG	120608	2019-02-0	11:22:36	PriceRetail	BEN	200.63	99.00
ENG	120608	2019-02-0	11:22:36	DatePriceUpdated	BEN	None	02/06/2019
ENG	120608	2019-02-0	11:22:36	Cost	BEN		0.00
ENG	120608	2019-02-0	11:22:36	PriceWholesale	BEN	200.63	99.00
ENG	120608	2017-06-0	19:57:15	Description	ROGER	elec	elec
ENG	120608	2012-07-0	12:13:15	Part Entered	FRANK		999

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	Stock	Edit	Edit	Description	Employee	Prior Value	New Value
ENG	120608	2019-12-0	12:40:33	PriceRetail	B O B	99.00	103.95
ENG	120608	2019-1		eUpdated	B O B	02/06/2019	12/05/2019
ENG	120608	2019-0		ail	BEN	200.63	99.00
ENG	120608	2019-0		eUpdated	BEN	None	02/06/2019
ENG	120608	2019-02-0	11:22:36	Cost	BEN		0.00
ENG	120608	2019-02-0	11:22:36	PriceWholesale	BEN	200.63	99.00
ENG	120608	2017-06-0	19:57:15	Description	ROGER	elec	elec
ENG	120608	2012-07-0	12:13:15	Part Entered	FRANK		999

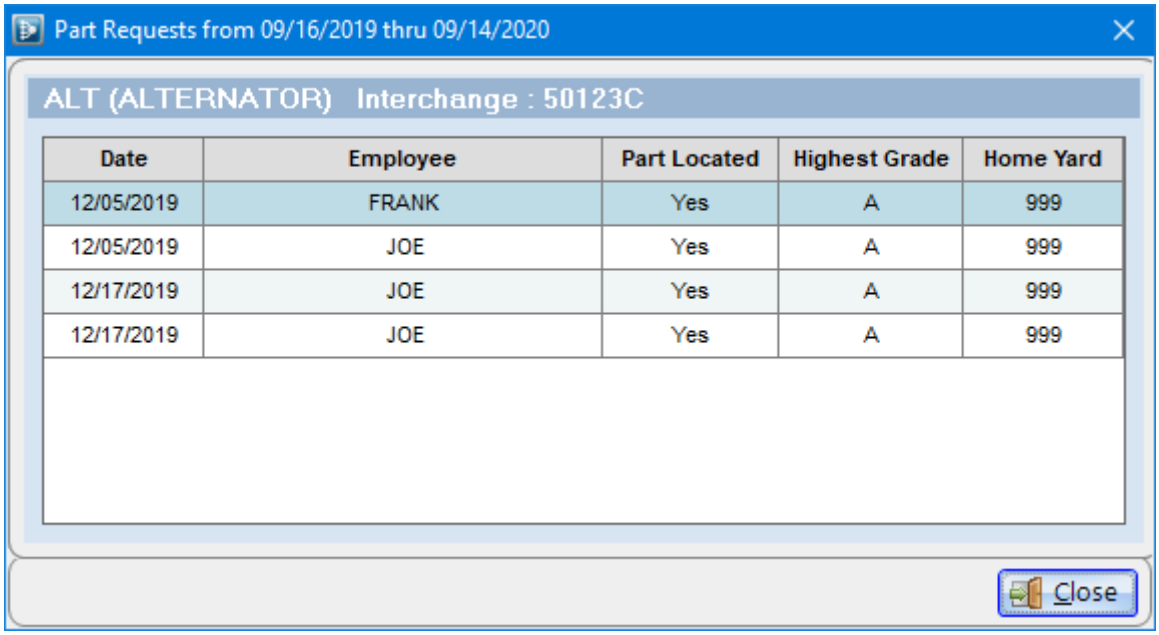
2. From the menu that appears, select the option for the information you want to copy.
3. Paste this information into a text editor or spreadsheet program (e.g., Microsoft Excel).

> ⚠ **Note:** In most programs, you can paste by pressing **CTRL+V** on your keyboard, or going to ***Edit>Paste***.

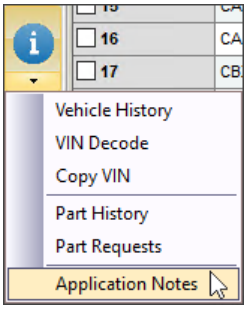
	A	B	C	D	E	F	G	H
1	Part	Stock No	Edit Date	Edit Time	Description	Employee	Prior Value	New Value
2	ENG	120608	12/5/2019	12:40:33	PriceRetail	B O B	99	103.95
3	ENG	120608	12/5/2019	12:40:33	DatePriceUpdated	B O B	2/6/2019	12/5/2019
4	ENG	120608	2/6/2019	11:22:36	PriceRetail	BEN	200.63	99
5	ENG	120608	2/6/2019	11:22:36	DatePriceUpdated	BEN	None	2/6/2019
6	ENG	120608	2/6/2019	11:22:36	Cost	BEN		0
7	ENG	120608	2/6/2019	11:22:36	PriceWholesale	BEN	200.63	99
8	ENG	120608	6/6/2017	19:57:15	Description	ROGER	elec (IMA),4DR,FTWCAR,3.0L 1 Year Warranty Avaiable	elec (IMA),4DR,FTWCAR,3.0L 1 Year WarrantyAvailable
9	ENG	120608	7/3/2012	12:13:15	Part Entered	FRANK		999

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**.

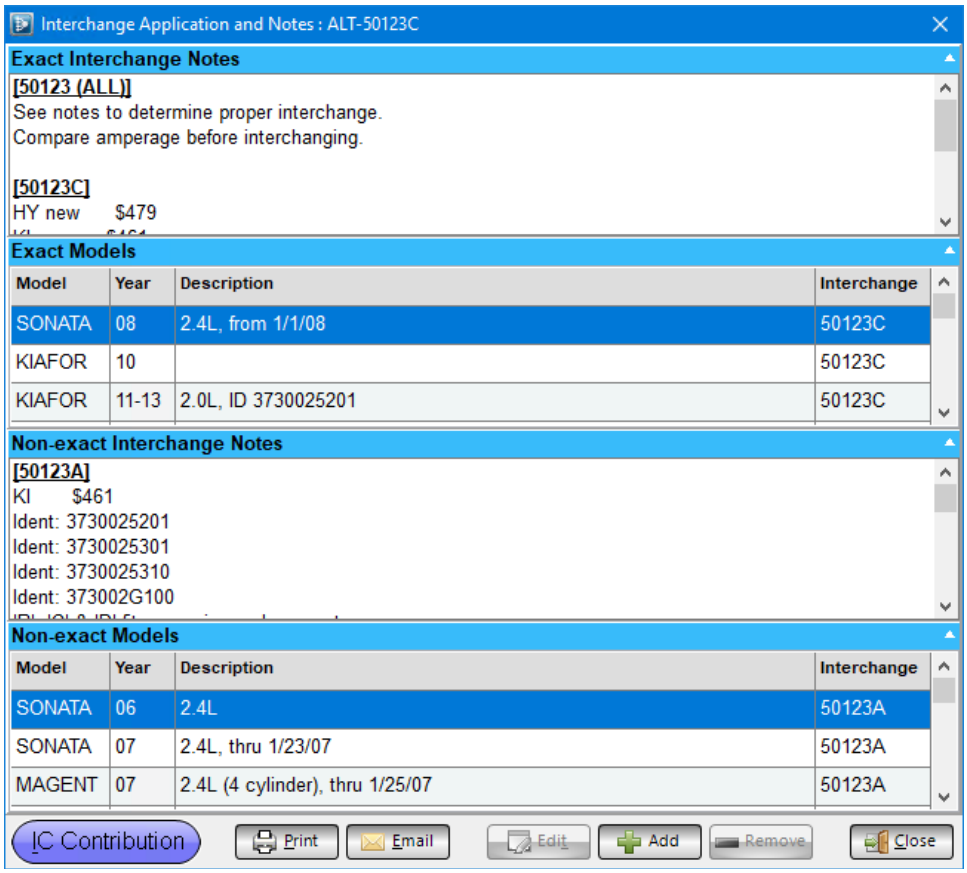
- **Find** tab – Interchange application displays for the part in your search results that's highlighted
- **Part** tab – Interchange application displays for the part you're adding or editing.

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**.



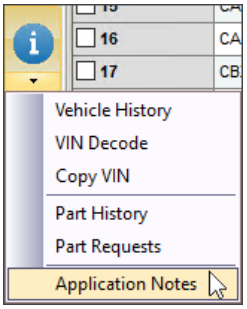
Note: You can only edit or remove notes that have been added by Checkmate users; you cannot modify Car-Part Interchange notes.

Interchange Contribution

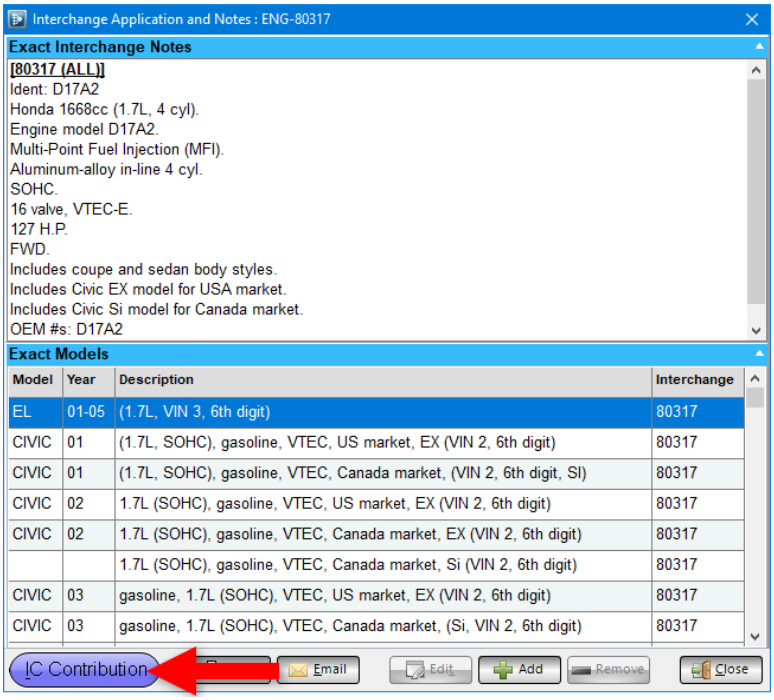
In Inventory Pro, you have the ability to submit interchange contributions to Car-Part.com's Interchange Development team. Use this feature when you want to submit information that would be useful to other recyclers, or to alert us if you find discrepancies in the interchange. The contributions you submit are sent directly to the Interchange Development team.

To submit an interchange contribution, follow these steps:

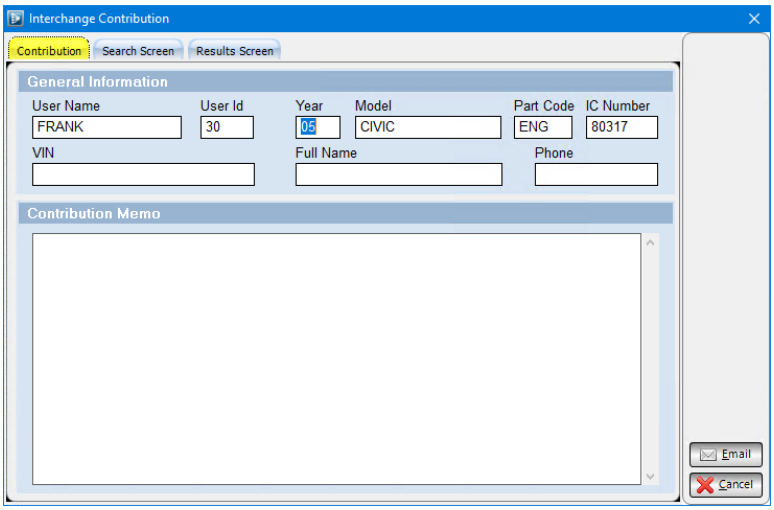
1. Locate the part you want to submit an interchange contribution for:
    - **Find** tab – Click to highlight a part with the interchange option you want to submit a contribution about.
    - **Part** tab – The contribution will be submitted about the interchange option that is currently selected for 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**.

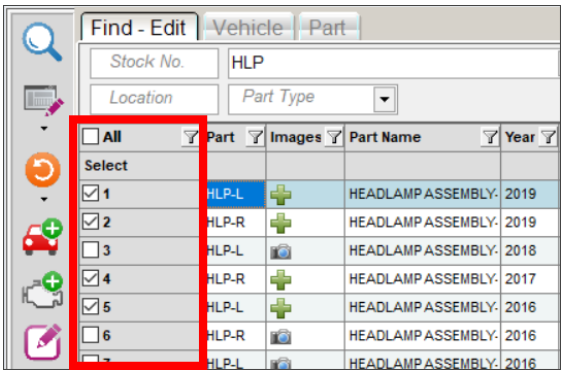
6. If the email did not automatically send, send the email to ICContributions@car-part.com

Sending Parts to Photomate for Photos

Photomate is a mobile app that allows you 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 Inventory Pro, you can use the Photomate button to send parts to Photomate for photos. You can do this on all three tabs:

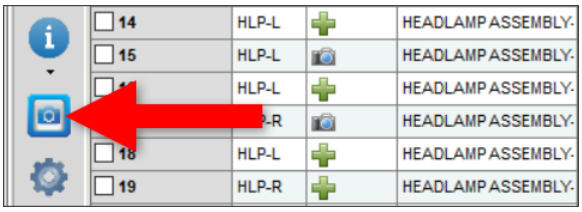
- **Find** tab – In your search results, check the boxes in the checkbox column for the parts you want to send to Photomate.



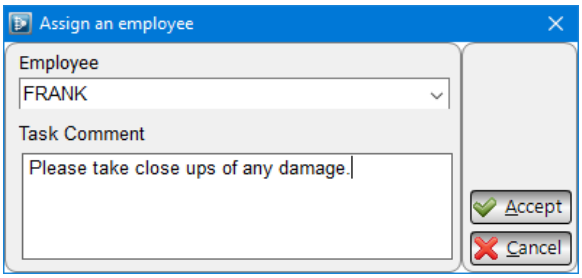
- **Vehicle** tab – Part selection is not necessary. The AUT record for the vehicle that's currently displayed will be sent to Photomate to add photos to the automobile record.
- **Part** tab – Part selection is not necessary. The part that's currently displayed will be sent to Photomate to add photos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

Customizing Views

In Inventory Pro, selecting a View sets the configuration of the search fields and information columns on the **Find** tab. Several Views come already set up and ready to use in Inventory Pro, but you can also create and save your own custom views.

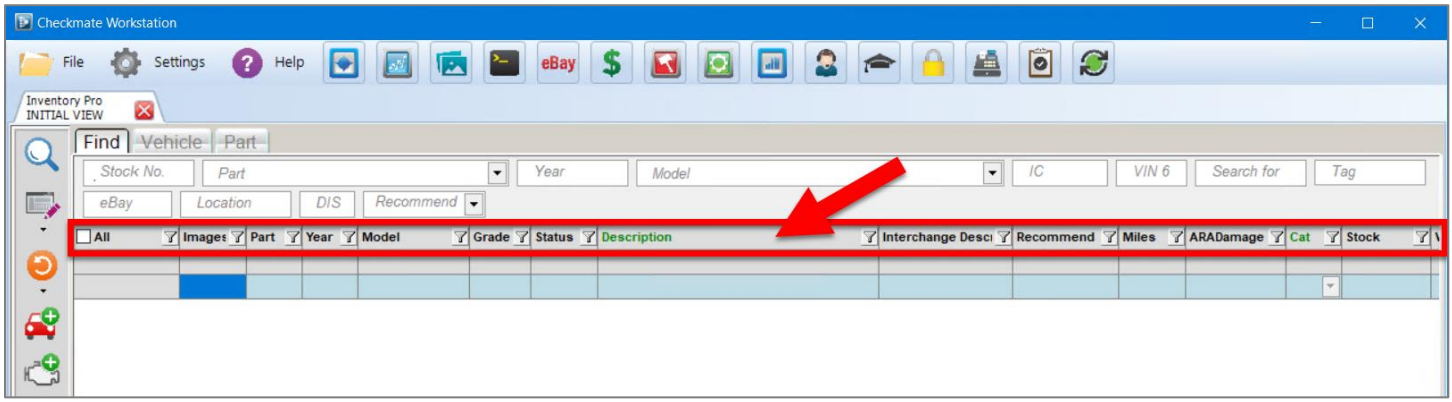
Creating and Saving Custom Views

To make and save a custom View, first arrange your screen (columns and search fields) the way you want your View to look, and then save that arrangement as a View.

You can begin from any existing View.

Follow these steps:

1. Choose which columns you would like to include in your custom View. To do this, right-click any column header.

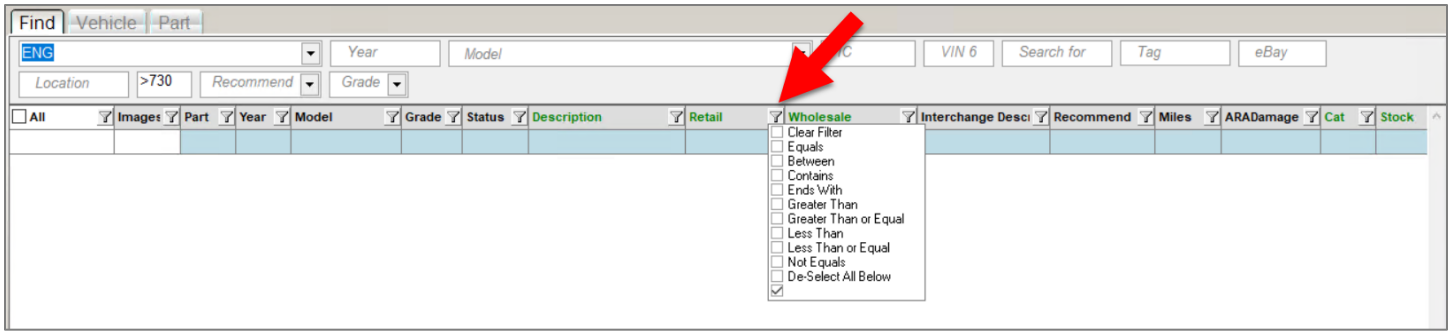


2. The **Columns** window opens. Check the box for each column you would like to display, then click the close button to exit this window.

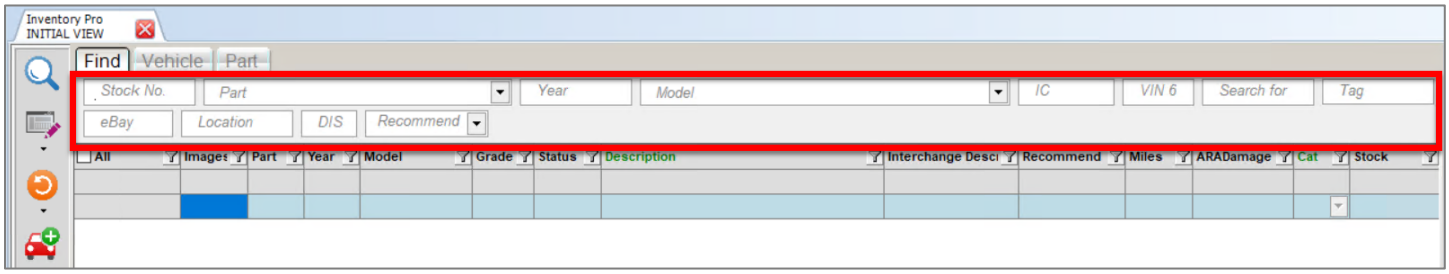
3. Drag and drop the columns in the order you prefer.

4. You can add filters to the columns, as well. If you do, when you open this custom View, these filters will automatically be applied, saving you the need to do so manually. For example, you could set a filter for the **Retail** column to show only parts with a price greater than or equal to $200.

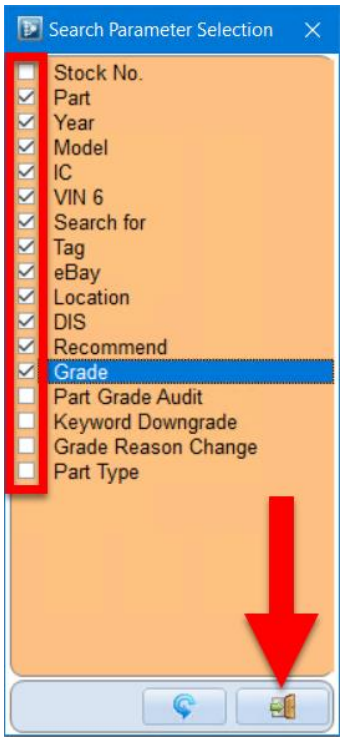
   To add a filter, click the filter button in a column header, and in the window that appears, select the filter you wish to apply.



5. Next, select the search fields you would like to include in your custom View. To do this, right-click anywhere in the part of the screen with the search fields.

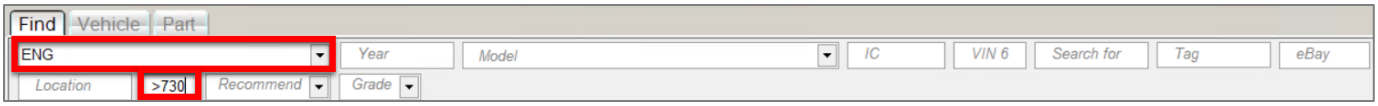


6. The **Search Parameter Selection** window opens. Check the checkbox for each search parameter you would like to include in your View, then click close to exit this window.

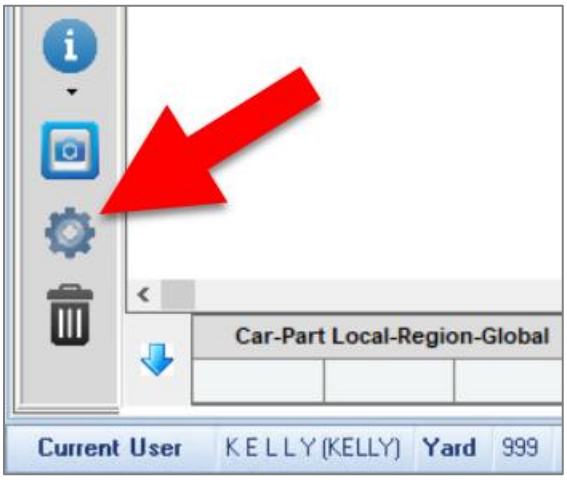


7. If you want, you can fill out the search fields, so that when you open this custom View, these fields will be automatically filled in.

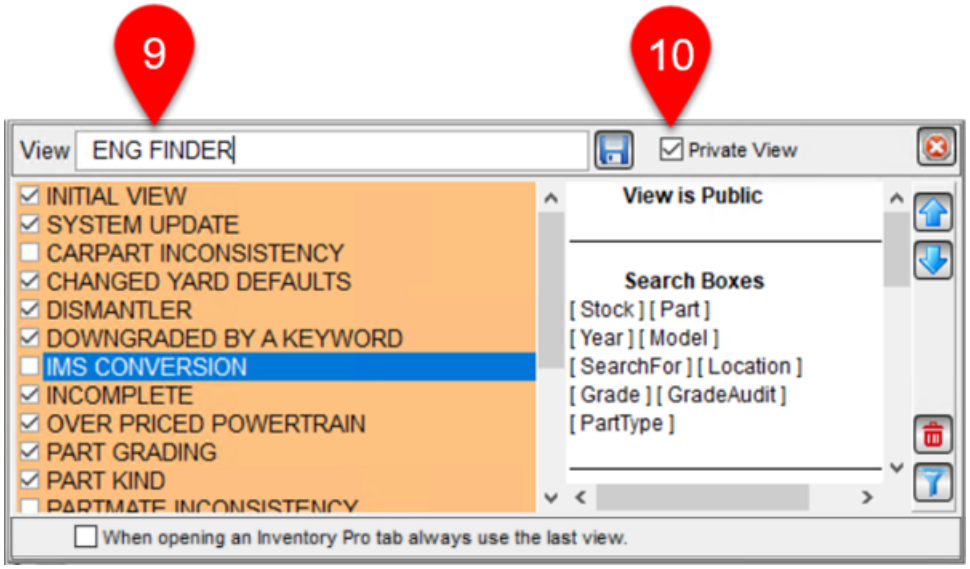
   For example, if you wanted to make a View that helped locate engines that have been in stock for over 2 years, you could set the **Part** field to ENG, and the **DIS** (days in stock) field to >730 (greater than 730 days). This way, when the View opens, ENG and >730 will already be filled in these fields.



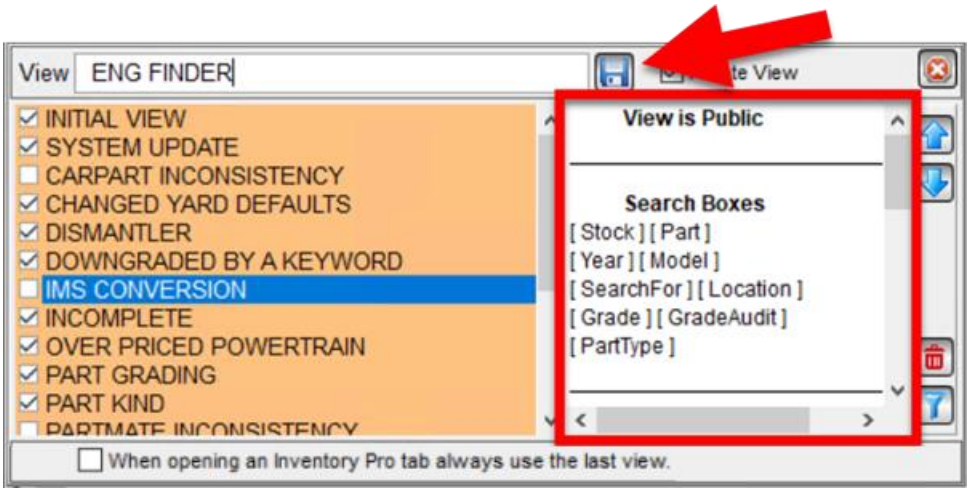
8. When you are satisfied with the way your screen looks, and with your chosen columns and search fields, you are now ready to save the View. To do so, click the gear button .



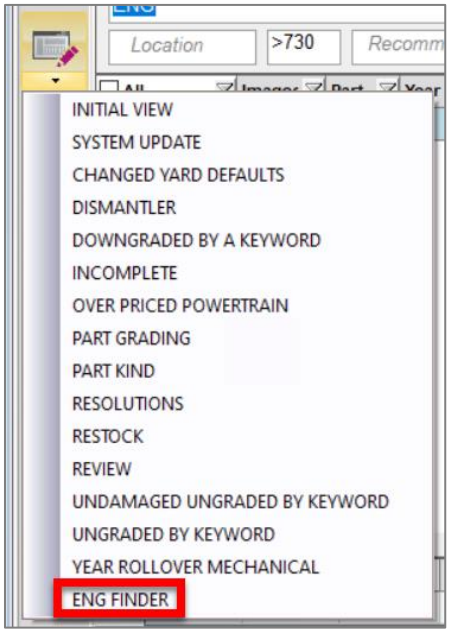
9. The View window opens. In the View field, enter a name for your new custom View. (You cannot choose the name of an existing View.)
10. (Optional) Use the **Private View** checkbox to make this a Private View. A Private View will only be accessible on your user account. If this box remains unchecked, this View will be available to your team, as well.



11. The right side of this window shows a summary of what is included in your custom View. Scroll to review the whole summary. Once you have verified that the View includes everything you want, click the save button in this window, and then click to exit this window.



12. Your custom View is now saved in Checkmate, and you can click the drop-down arrow below the select View button to select it from your list of Views.



Managing the List of Views

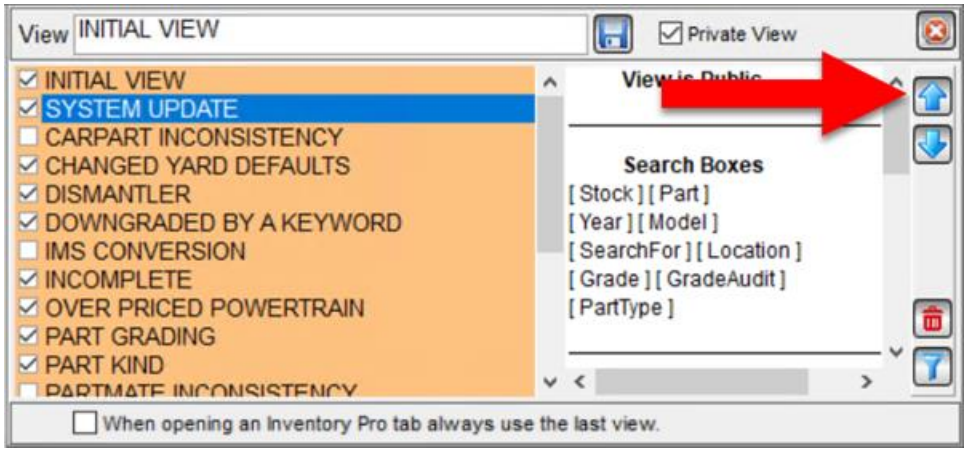
Re-ordering Views

You may wish to rearrange the list of Views to put your favorite Views at the top. Remember, the first View in the list is tied to the Select View button (if you click the button, it will default to the first listed View).

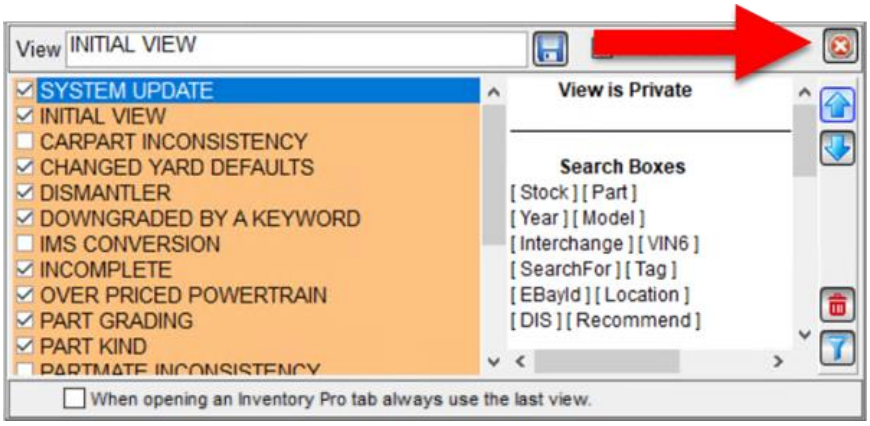
To rearrange the list of views, follow these steps:

1. Click the gear button .

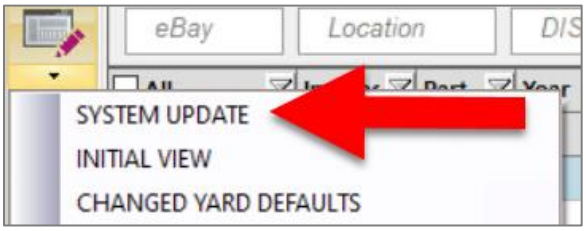
2. In the window that appears, click to highlight the View you would like to move up or down, and then click the up or down arrow accordingly.



3. Click the X to close this window.



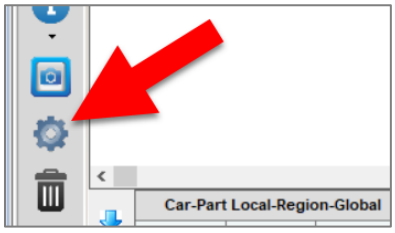
4. When you reopen the list of views, the View is moved up or down.



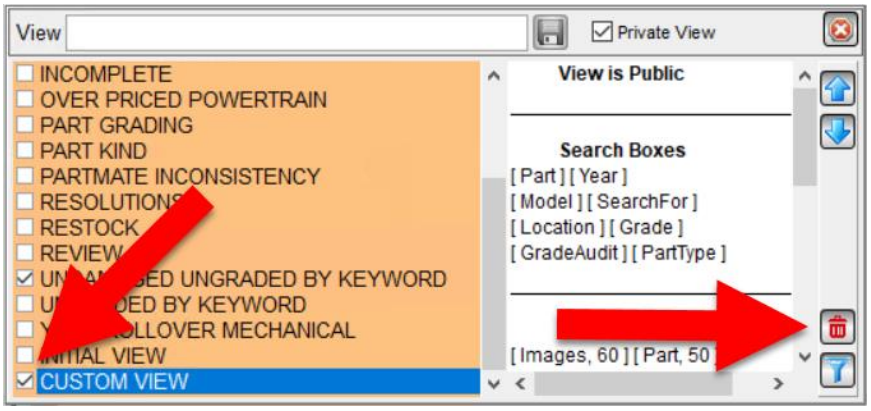
Deleting Custom Views

To delete a custom View:

1. Click the gear button to open the **View** window.



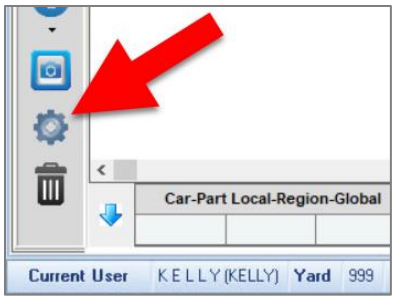
2. Check the checkbox for the View you wish to delete, and click the delete button. (You cannot delete any of the Preset Views; however, you can hide them as described in the next section.)



Hiding Views

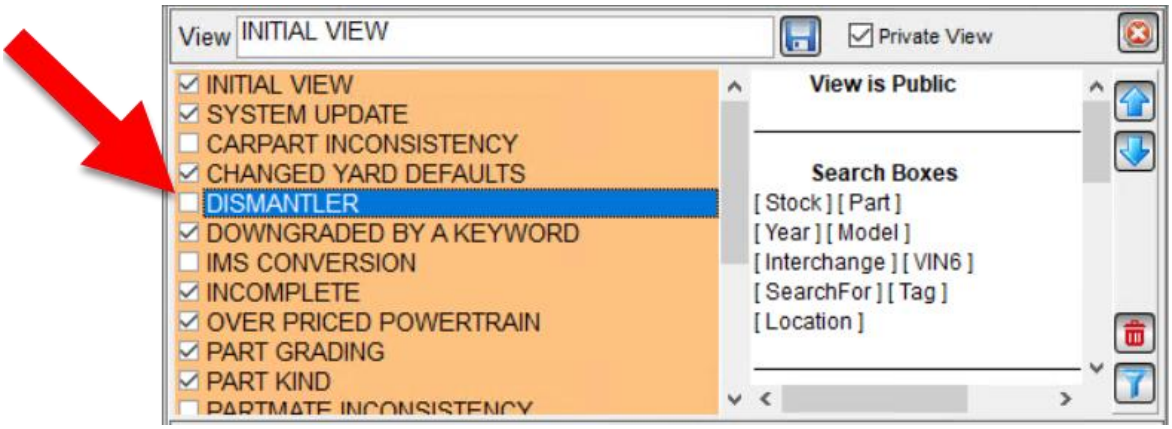
Between many Preset Views and the custom Views you add, your list of Views could get unwieldy. Fortunately, you can hide unused Views. To do so:

1. Click the gear button .

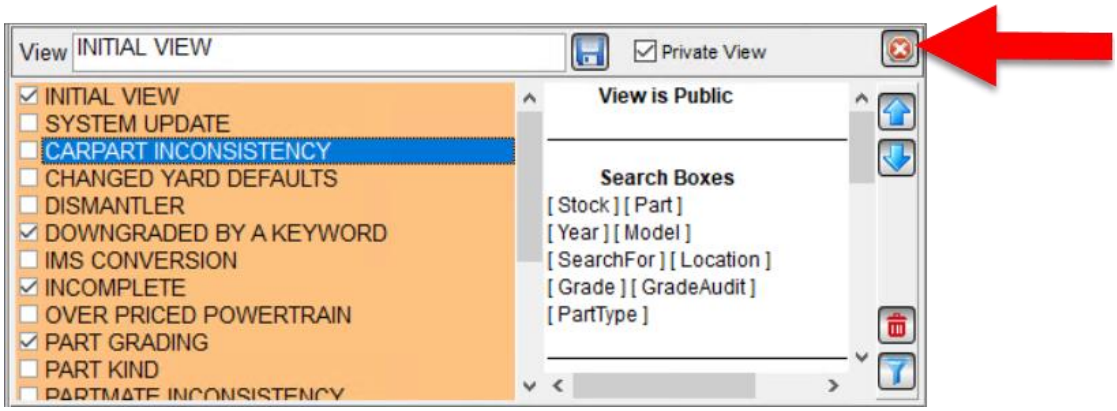


2. In the window that appears, all Views that are currently visible in the select View drop-down are checked.

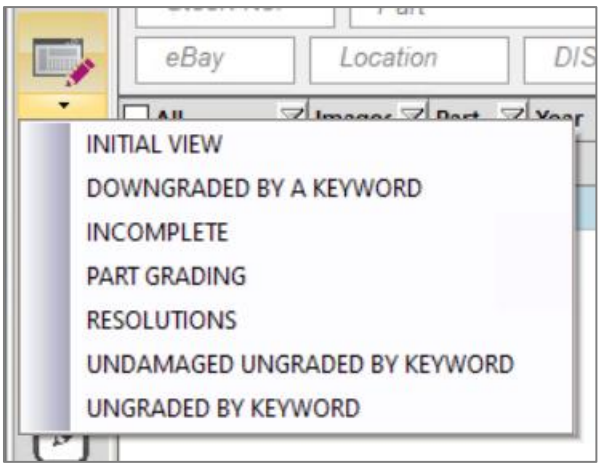
   To hide a View, uncheck it.



3. Click the X to close this window.

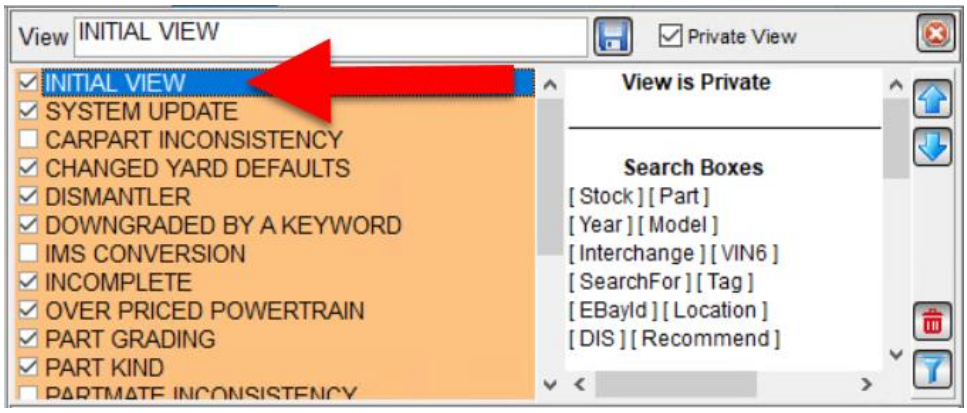


4. Now, when you click the select View drop-down, hidden Views will not be visible in the Select View Drop-down list.



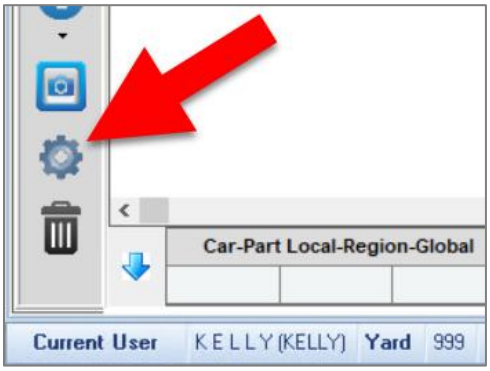
Setting a Default View

You can set a default View in Inventory Pro. If you do, when you open a new Inventory Pro tab, your chosen default View will display. The default View is whichever View appears at the top of your list in the **Views** window (which you can open by clicking the gear button).

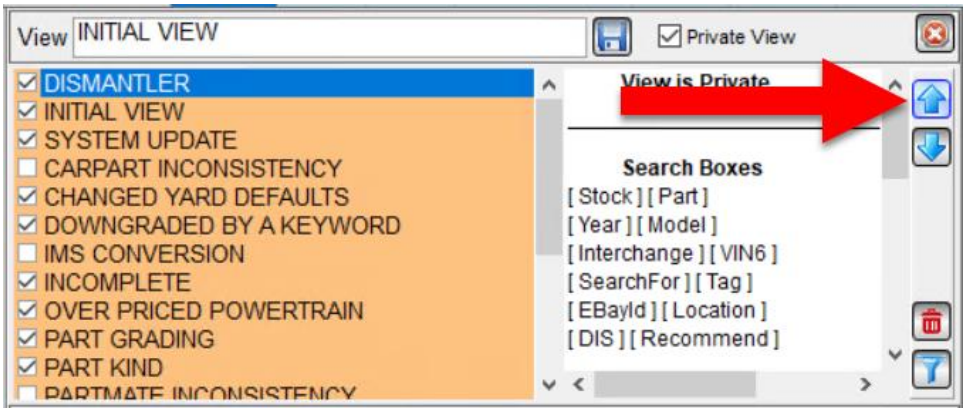


To change which View is set as your default:

1. Click the gear button.



2. The **Views** window opens. Select the View which you would like to set as your new default.
3. Click the up-arrow until the View is at the top of the list. Then click the close button to exit this window.



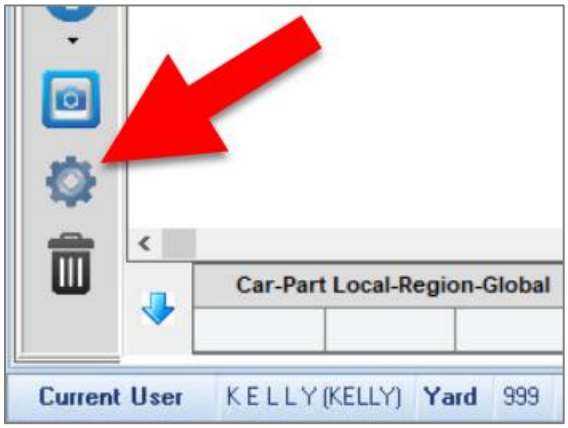
4. The View you moved to the top in the **Views** window is now your default. If you exit your current Inventory Pro tab, and open a new one, your new default View will display.

Defaulting to the Last Used View

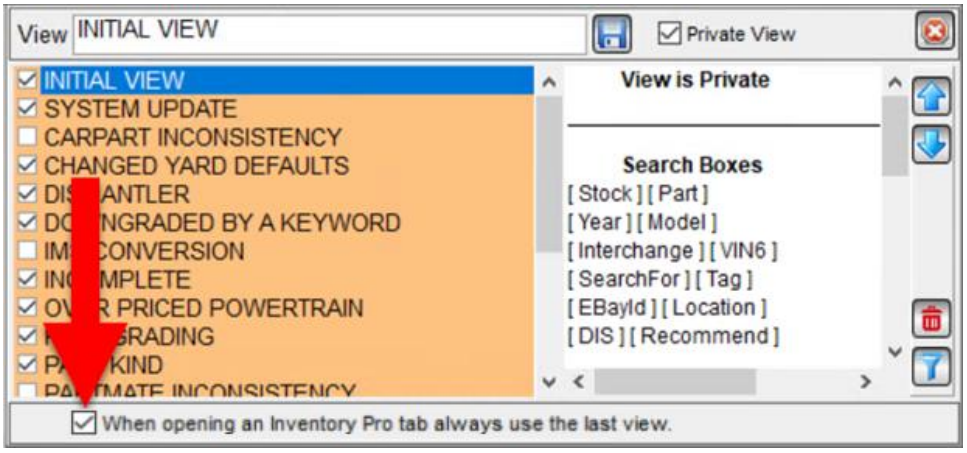
In addition to being able to set a View as your default, you can also set Inventory Pro to open with whichever View you used last (before exiting either Inventory Pro or Checkmate Workstation).

To set Inventory Pro to default to your last used View, follow these steps:

1. Click the gear button.



2. The **Views** window opens. At the bottom of this window, check the box for **When opening an Inventory Pro tab always use the last view**.



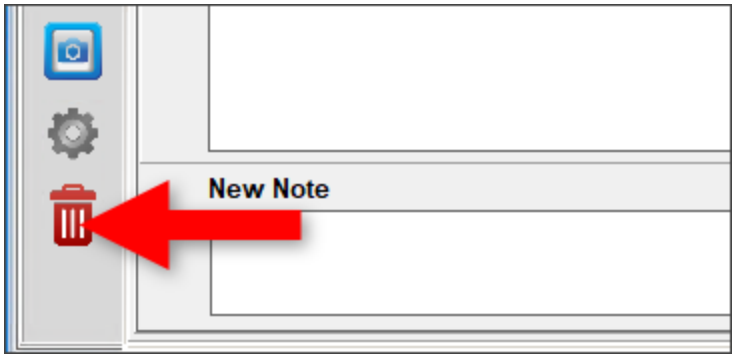
3. Then click the **X** to exit this window. Checkmate is now set to open new Inventory Pro tabs with whichever View you used last.

Deleting Inventory

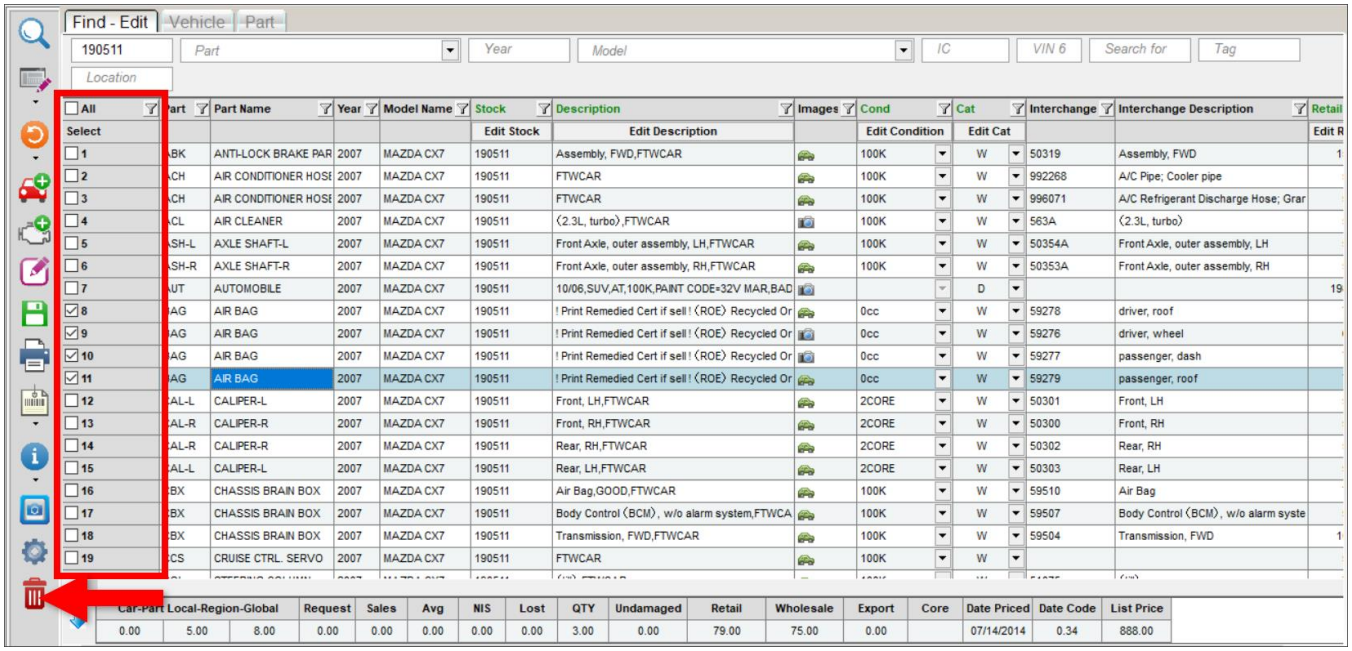
Inventory Pro allows you to easily delete parts from your inventory.

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

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



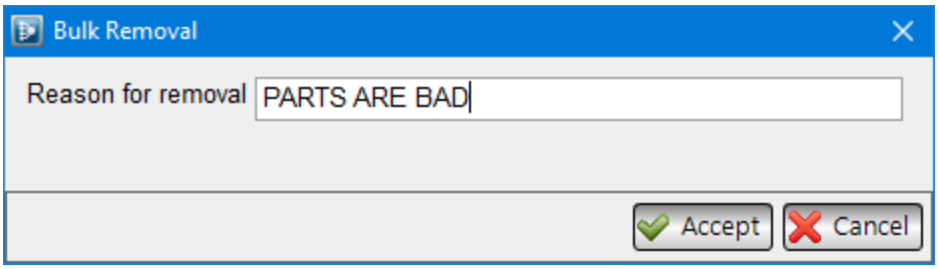
- On the **Find** tab:
  - Click to check the boxes in the checkbox column for each part you want to delete.
  - Click the trashcan button.



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 Pro: **Vehicle History** window, **Parts Deleted** tab
- Dashboard tool: **Removed Inventory** gadget
- Checkmate Retro: **Print Transaction Report** function*

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



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

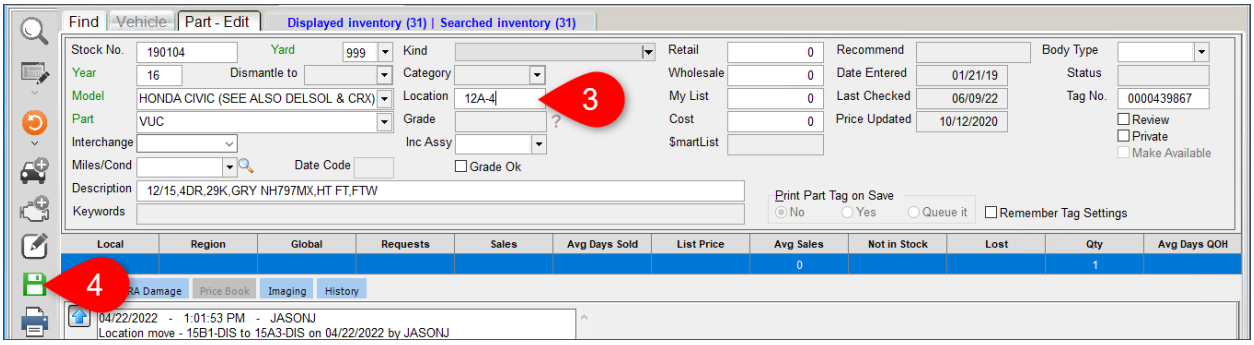
⚠ **Warning!** Do not delete parts unless you are absolutely sure. Deleting inventory cannot be undone!

* Checkmate Full: **5,6** or Checkmate Classic: **V6** or Checkmate Junior: **5,6**

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.

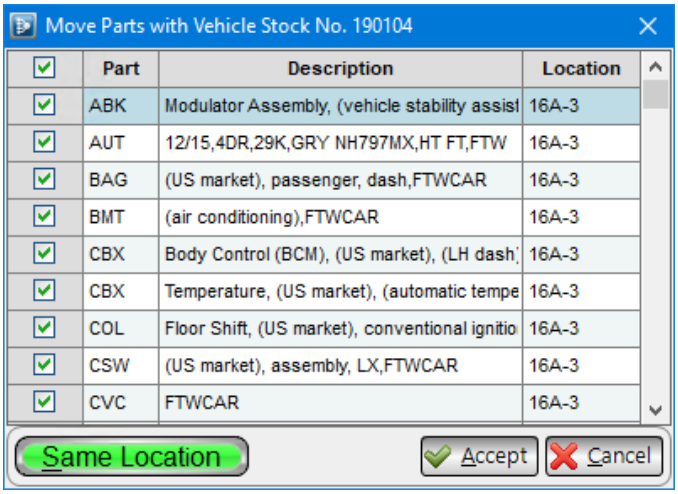


4. Click the save button.
5. The **Move Parts with Vehicle Stock No.** window opens.

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.

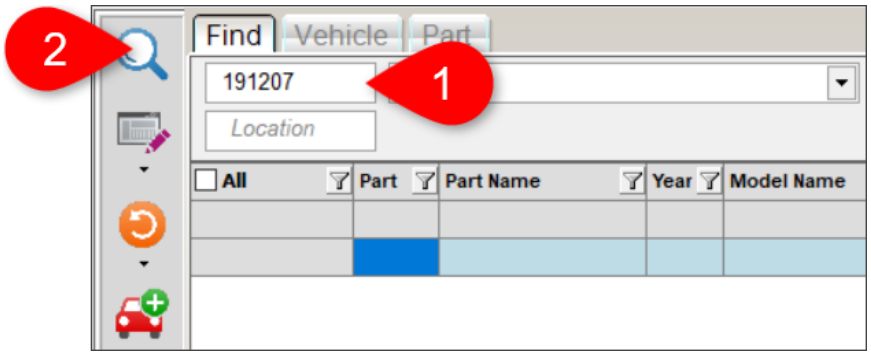
Crushing a Vehicle

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:

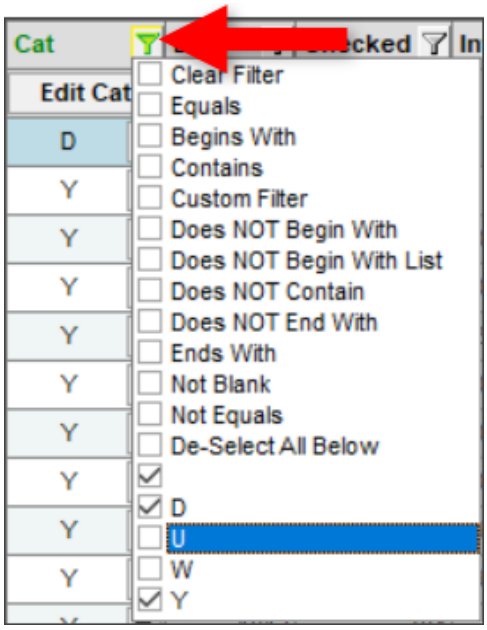
- Delete scrapped parts
- Restock unbolted parts that weren't scrapped
- Update AUT record

To crush a vehicle, follow these steps:

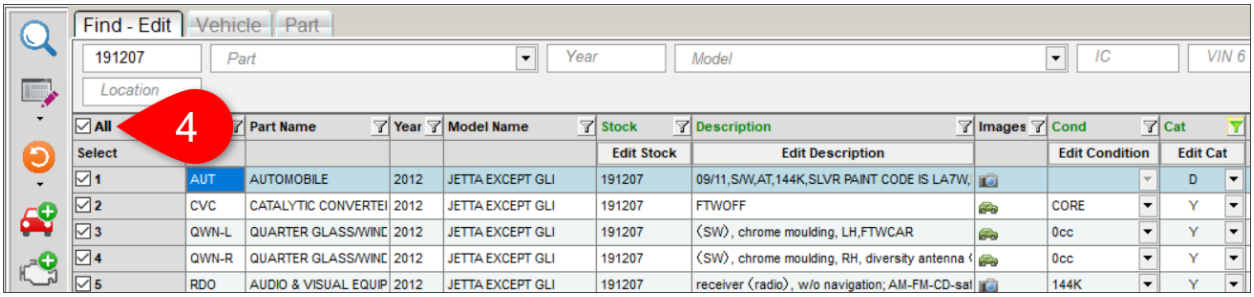
1. On the **Find** tab, type in the **Stock** number for the vehicle you're crushing.
2. Click the magnifying glass button.



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.

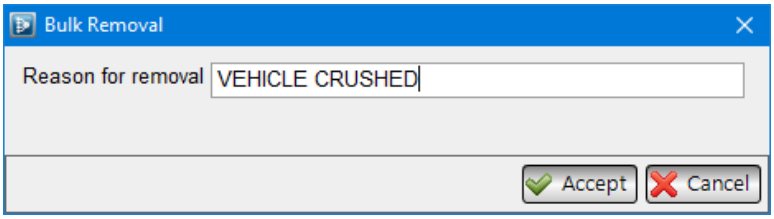


4. Once you have filtered out the parts you are not scrapping, click to check the top box in the checkbox column to select all of the remaining parts. If there are any parts you want to save, uncheck the boxes for those parts.

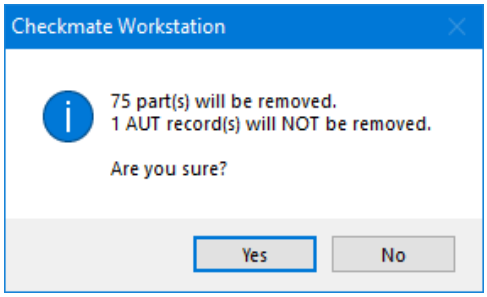


5. Click the trash can button.

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!

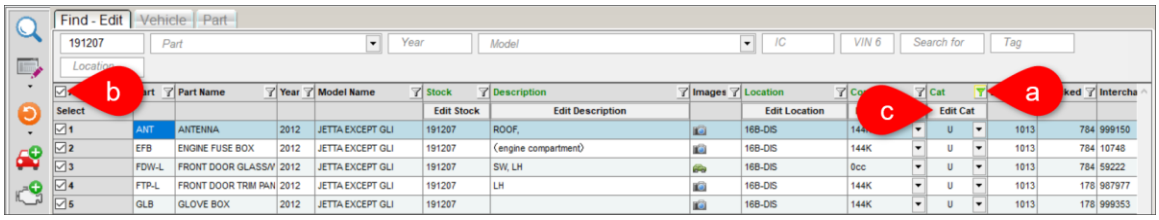
8. The remaining parts associated with that stock number display on the **Find** tab. If you are not scrapping the unbolted parts from the vehicle, these parts must be restocked. If you don't have any parts to restock, skip to the next step. To restock unbolted parts:

    a. On the **Cat** (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.

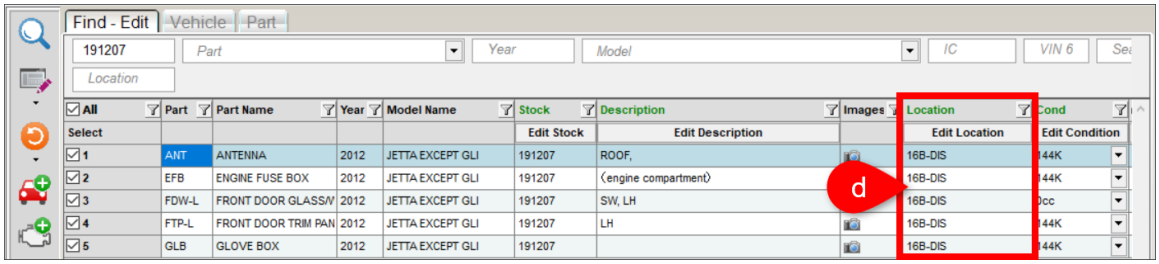
    - To edit the category for all checked parts at once, click the **Edit Cat** button at the top of the column bulk edit the selected parts (refer to the **Bulk Editing Multiple Parts** section of this guide for more info.)



    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 Multiple Parts** section of this guide for more info.)

    - To edit the location for one part, click in the **Location** field, and type the new location.

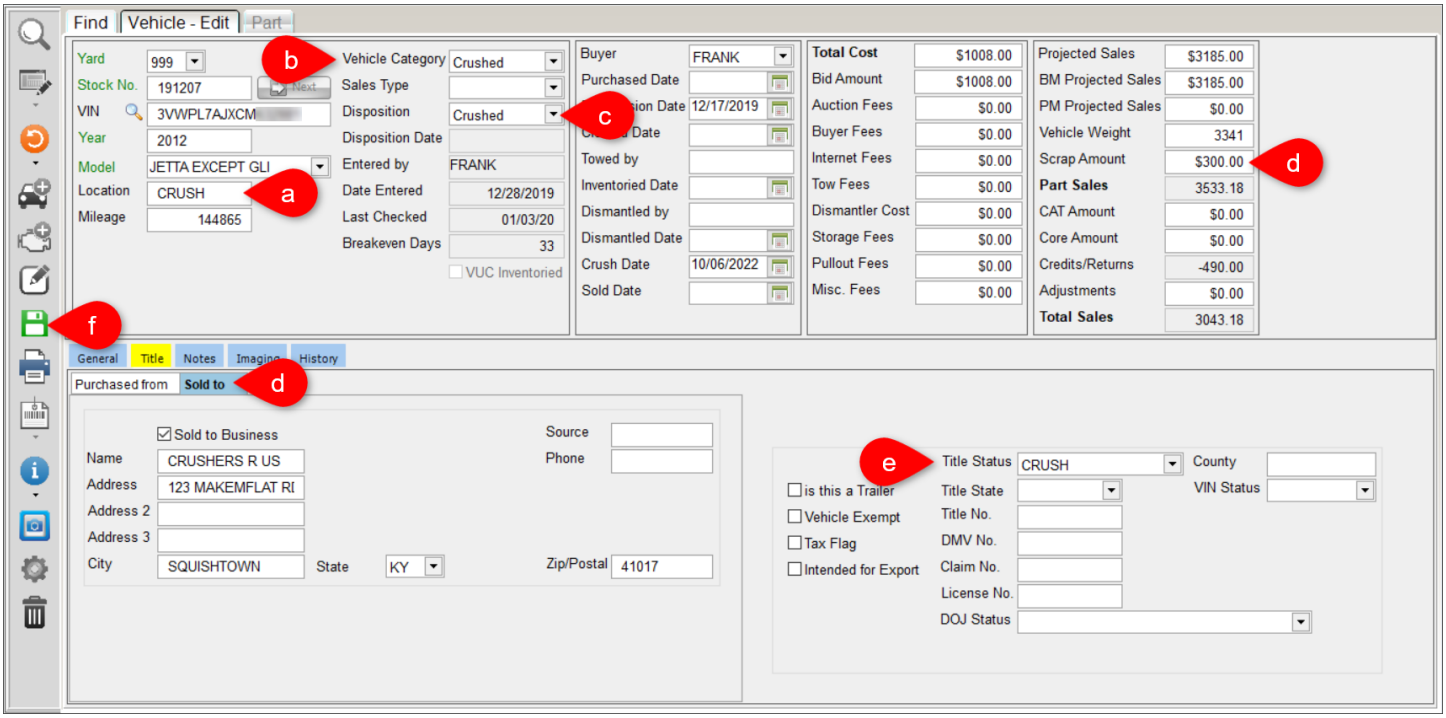


Note: You can also use the Photomate app to relocate parts. Refer to the Photomate user guide for more information.

    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. Set the **Title Status** to **CRUSH** (this is for NMVTIS reporting).*
    f. Click the save button. The crushing process is now complete.



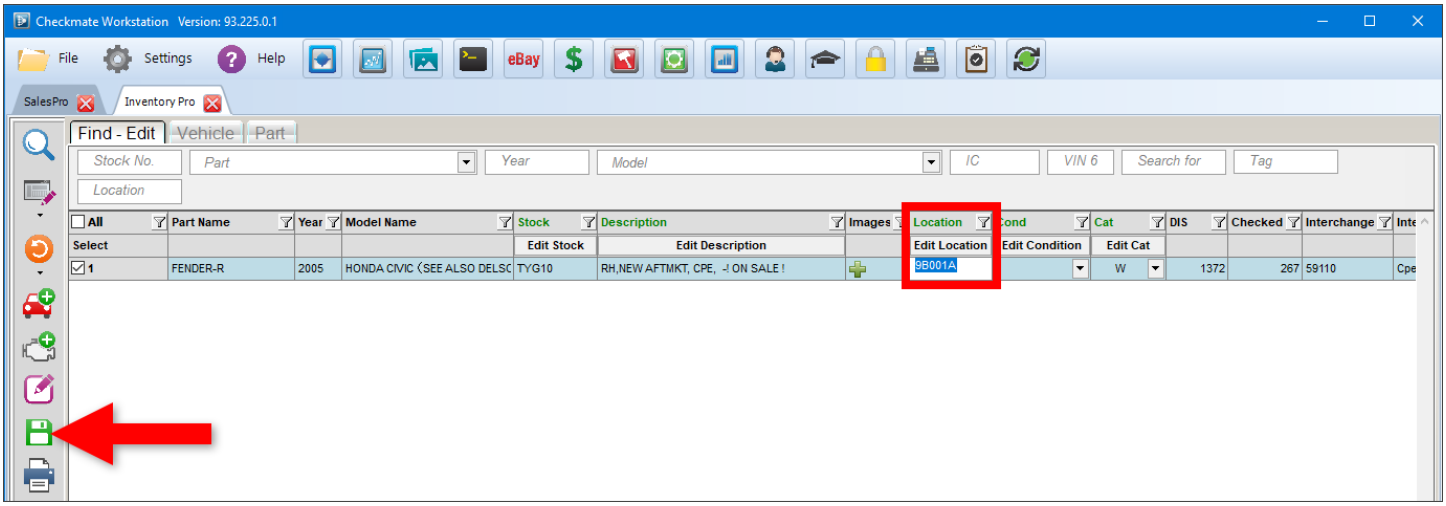
* For more information about NMVTIS reporting, refer to this guide: Checkmate NMVTIS Reporting Guide.

Sales Pro Return: Restocking Parts Now

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, Inventory Pro opens with the part(s) you're returning displayed to restock.

To restock parts:

1. For each part being restocked:
    - Click inside the **Location** field.
    - Type the new location.
    - (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.

Updating Parts with Discontinued Models/Part Codes

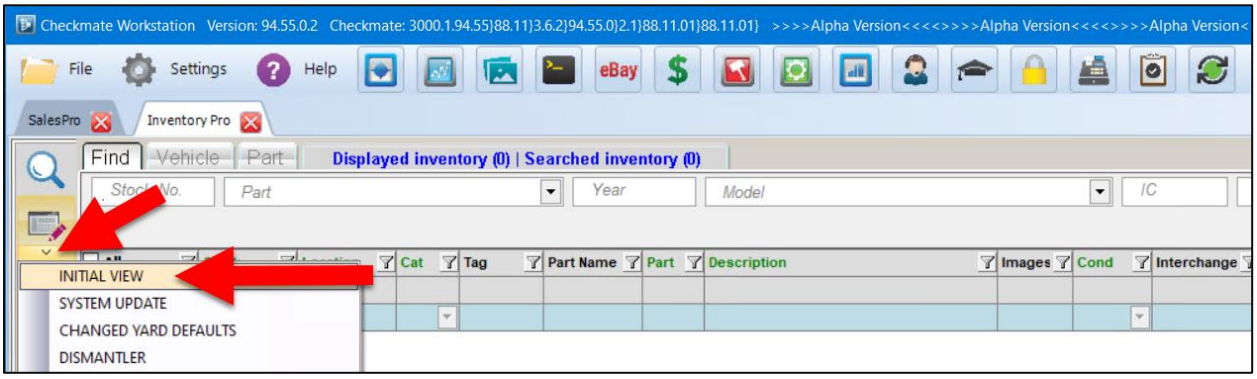
Over time, new interchange development can result in discontinued models and part codes. Refer to the following sections to see how you can see if you have any of these parts in your inventory.

Update Parts with Discontinued Models

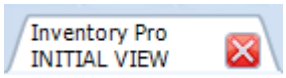
Sometimes an interchange release splits an existing model into multiple models to increase clarity, which can result in an existing model being discontinued.

To find and correct parts in your inventory with discontinued model names:

1. Start on the **Find** tab. The INITIAL VIEW is recommended for this workflow. If you are not in the INITIAL VIEW, click the down arrow on the Select View button , and select **INITIAL VIEW**.

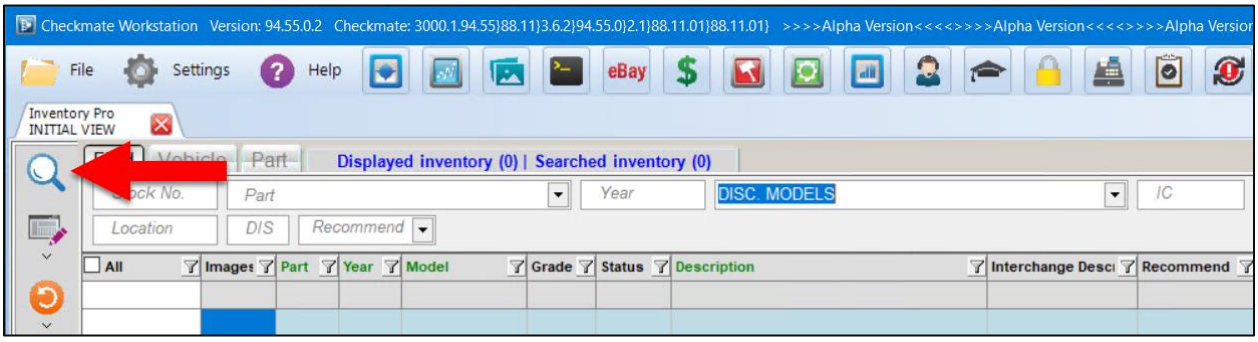


2. The search fields and columns are rearranged according to the INITIAL VIEW. (Notice that the text on the Inventory Pro tab reflects the view.)



   In the **Model** search field, type: **DISC. MODELS**

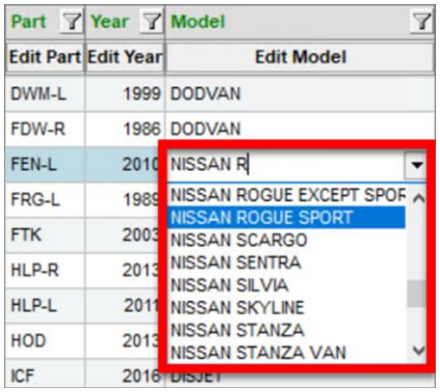
3. Click the magnifying glass button to search.



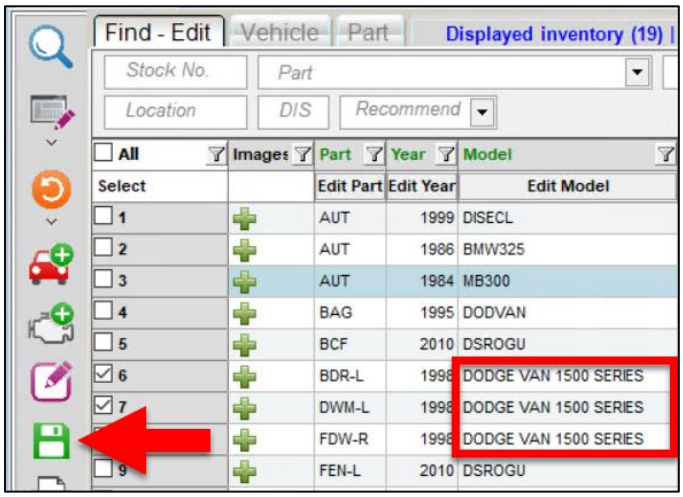
4. Your search results appear, displaying only parts with a discontinued model. If you have parts in your search results, continue to the next step.

   If you don't have any parts in your search results, that means you don't have parts with discontinued models in your inventory and do not need to complete the following steps.

5. The **Disc Model Note** column provides information to help you update these parts. If you don't have this column displayed, follow these steps to turn it on:
    a. Right-click on any column-header. The **Columns** window opens, displaying a list of available columns.
    b. Find the **Disc Model Note** option and check the box to turn it on.
    c. Click **Close**.
6. Update the model for each part in your search results.
    - To update an individual part, double-click the part line in the **Model** column, and enter the updated model name. Refer to the **Disc Model Note** column for help determining what the appropriate updated model is.



    - To update many parts with the same change (e.g., update all parts on a vehicle at once), you can bulk edit them. For information, refer to the section of this guide called: **Bulk Editing Multiple Parts**.
6. Repeat the previous step until an updated model has been selected for each part in your search results.
7. Click the save button to make the changes permanent.

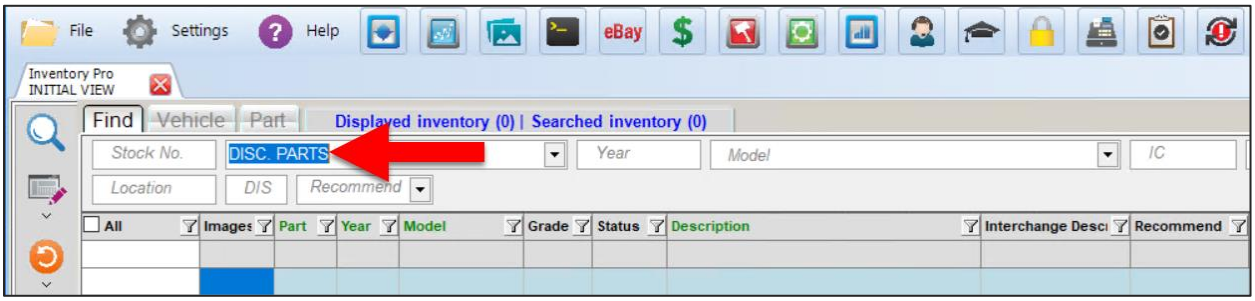


⚠ **Note:** After you update parts that had a discontinued model, you may need to assign interchange to these parts. To do so, follow the steps in the section of this guide called: **RESOLUTIONS VIEW**.

Update Parts with Discontinued Part Codes

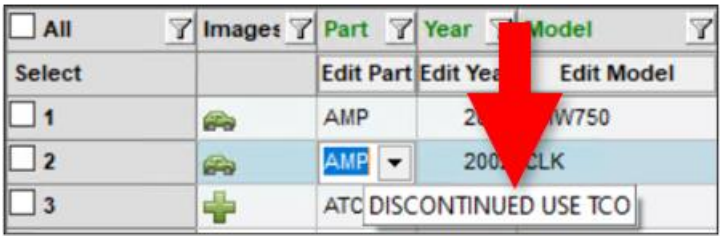
At times, new interchange development in an interchange release can result in a discontinued part code. To check to see if you have parts with discontinued part codes in your inventory, follow these steps:

1. In Inventory Pro, in the **Part** search field, type: **DISC. PARTS**



2. Click the magnifying glass to search.
3. Your search results appear, displaying only parts with a discontinued part code. If you have results in your search, continue to the next step

   If you don't have any parts in your search results, that means you don't have parts with discontinued part codes in your inventory. Skip down to the section of this guide called: **Step 3: Update Remaining Resolution Parts**
4. The **Disc Part Note** column provides information to help you update these parts. If you don't have this column displayed, follow these steps to turn it on:
   a. Right-click on any column-header. The **Columns** window opens, displaying a list of available columns.
   b. Find the **Disc Part Note** option and check the box to turn it on.
   c. Click **Close**.
5. In the **Part** field, select a valid part code:
   - To see a suggestion for an updated part code that may be appropriate for the part, hover your mouse over the **Part** column. For additional information, refer to the **Disc Part Note** column. Review the part information to see if the suggested part code is appropriate for the part, and edit the part appropriately.



6. When you've finished making changes, click the save button to make the changes permanent.

⚠ **Note:** After you update parts that had a discontinued part code, you may need to assign interchange to these parts. To do so, follow the steps in the section of this guide called: **RESOLUTIONS VIEW**.

Audit Views: Correcting Missing/Inconsistent Information

It's important to keep your inventory information accurate and current, so that it is correct in Checkmate and so your parts are represented accurately in online listings. Remember, customers shopping on Car-Part.com marketplaces (including Car Part Pro and Trading Partners) can sort their search results by part grade; on Car Part Pro, many customers filter out ungraded (or lower grade) parts entirely. That's why it's so important to review and correct inventory information.

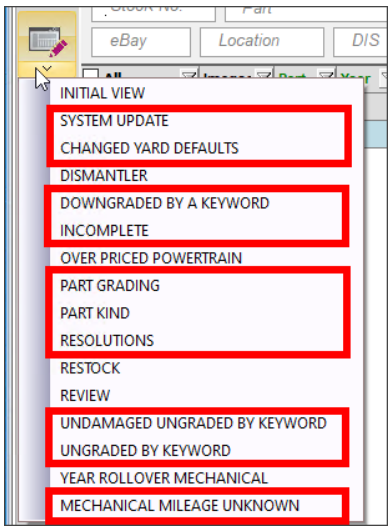
In Inventory Pro, Views help you review and improve your inventory information by uncovering parts that need your review/attention because of missing/inconsistent information. You can use these views to review these parts and ensure they are accurately described and graded.

For example: If Checkmate detects an inconsistency in a part (e.g., a part inventoried with a damage code of 000, but with a Description that includes the word "DENTED"), it will ungrade the part. The UNDAMAGED UNGRADED BY KEYWORD View would help you identify, review, and correct the inconsistent information.

Views designed to help you review and correct your inventory information include the following:

- SYSTEM UPDATE
- CHANGED YARD DEFAULTS
- DOWNGRADED BY A KEYWORD
- INCOMPLETE
- PART GRADING
- PART KIND
- RESOLUTIONS
- UNDAMAGED UNGRADED BY A KEYWORD
- UNGRADED BY KEYWORD
- MECHANICAL MILEAGE UNKNOWN

To access these Views, click the down arrow on the select View icon.



The following sections of this guide explain how to use these Views.

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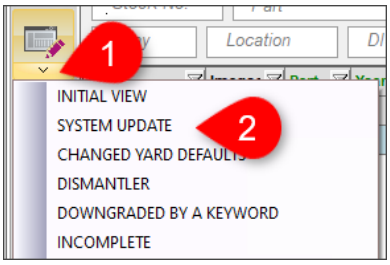
SYSTEM UPDATE View

Purpose: Improve inventory information. This View searches for parts which had the grade changed when your Checkmate software or interchange was updated. (Sometimes, an update may introduce a new grading standard.)

Goal: Confirm new part grades or edit any inaccurate part information.

To use this View, follow these steps:

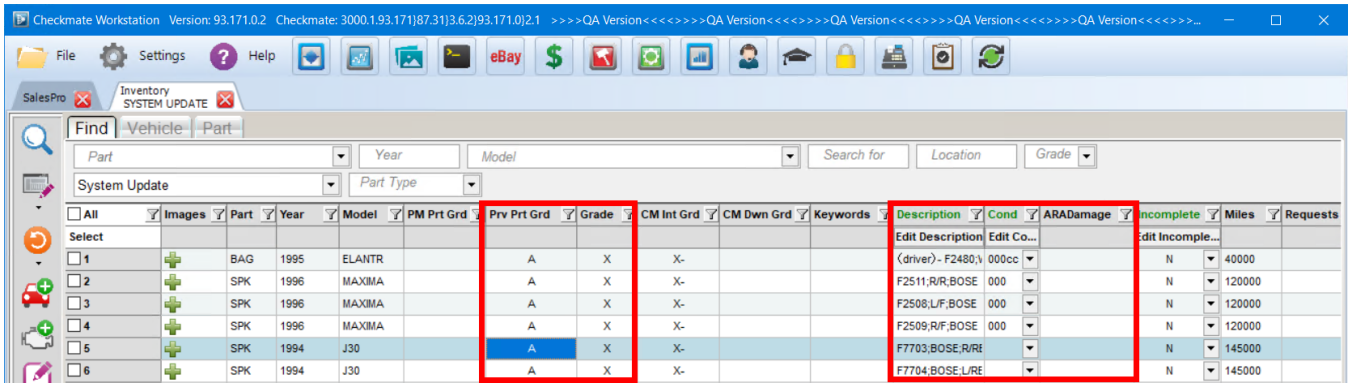
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **SYSTEM UPDATE**.



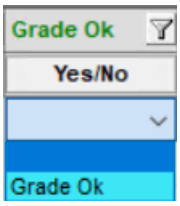
The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **System Update**. (It may take several seconds to load.)

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.

   Your search results display parts for which the grade was affected by a system update.
5. Choose a part to work with, and review the information for the part,
   - Check the **Grade** column, which shows you the new grade Checkmate assigned after the system was updated. Compare that to the **Prv Prt Grade** (Previous Part Grade) column.



6. Then, either confirm the new grades, or edit any inaccurate part information.
    - To approve the changes and accept the new grade Checkmate assigned, mark the part(s) as **Grade Ok**:
        - Single part: Find the **Grade Ok** column (you may need to scroll horizontally to find it). Click the drop-down arrow, and select **Grade Ok**.
        - Multiple parts: Check the checkboxes in the **Select** column, then click the **Grade Ok** column's **Yes/No** button to bulk approve all of these parts.



        The part will no longer appear in future audits.
    - If any information is inaccurate, edit the part as necessary.
7. Repeat steps 5-6 for each part.
8. When you're finished, click the save button.

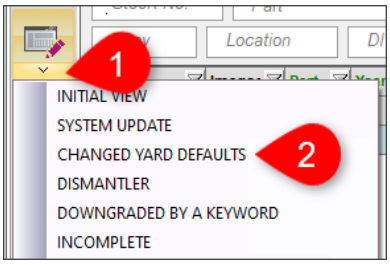
CHANGED YARD DEFAULTS View

Purpose: See if a recent change to your yard settings has changed any of your parts' grades, and then either confirm the new grades, or edit any inaccurate part information. This View searches for parts with grades that changed as a result of your Checkmate yard settings being changed.

Goal: Confirm new part grades.

To use this View, follow these steps:

1. On the **Find** tab, click the down arrow on the select View button.
2. Select **CHANGED YARD DEFAULTS**.

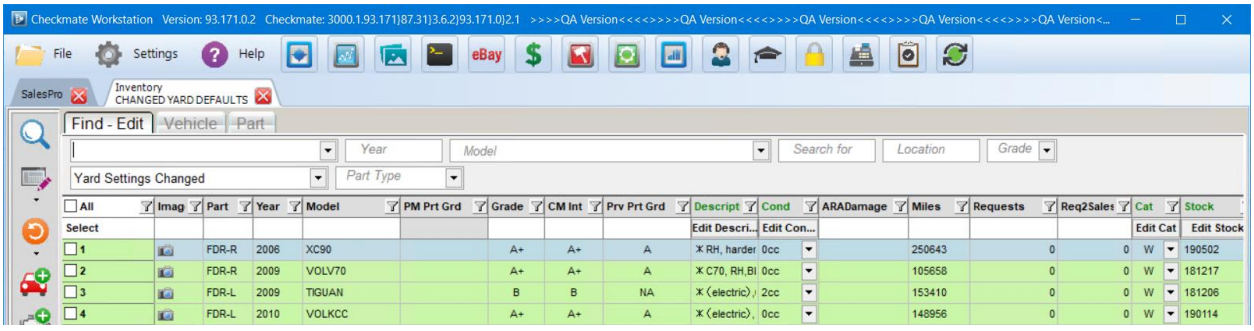


The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Yard Settings Changed**. (It may take several seconds to load.)

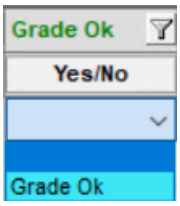
3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.

   Your search results display parts that had the grade affected by a change in your yard settings.

5. Choose a part to work with, and review the information for the part.
   - Check the **Grade** column, which shows you the new grade Checkmate assigned after your yard settings changed. Compare that to the **Prv Prt Grade** (Previous Part Grade) column.



6. Determine if the downgrade is appropriate and then, either confirm the new grades, or edit the part.
    - If the downgrade is appropriate, and you want to accept the new grade Checkmate assigned, mark the part(s) as **Grade Ok.**
        - Single part: In the **Grade Ok** column, click the drop-down arrow, and select **Grade Ok**.
        - Multiple parts: Check the checkboxes in the **Select** column, then click the **Grade Ok** column's **Yes/No** button to bulk approve all of these parts.



      The part will no longer appear in future audits.
    - If the change is not appropriate, you can lower the part grade by putting NIB or NIQ in the part's **Condition** field. Learn more about this in the **Downgrading with NIB/NIQ in the Condition Field** section of this document.
7. Repeat steps 5-6 for each part.
8. When you're finished, click the save button.

Note: If you believe the change in yard settings has resulted in less accurate grades overall, you can revert to your previous yard settings, and follow this procedure again to review the changes it made to your part grades.

DOWNGRADED BY A KEYWORD View

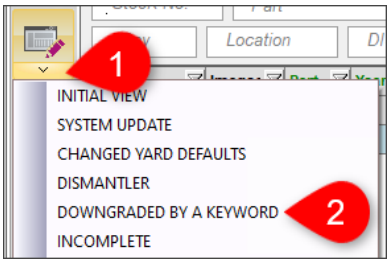
Purpose: Improve inventory information. This View searches for parts that were inventoried with some damage, but the value in their **Condition** field is inconsistent or conflicting with keywords in their **Description**, or other part information. As a result, Checkmate downgraded (lowered the grade of) or ungraded the part. Use this View to see which parts Checkmate has downgraded, and then update the parts' **Condition** fields to match the **Description**s.

Example: An alternator (ALT) with less than 60,000 miles would normally be an A grade part. But if the **Description** includes the keyword "BAD" (e.g. "BAD PULLEY"), then Checkmate will downgrade the part to C and that part would be included on this View for your review.

Goal: Correct inconsistencies between parts' **Condition**s and **Description**s.

To use this View, follow these steps:

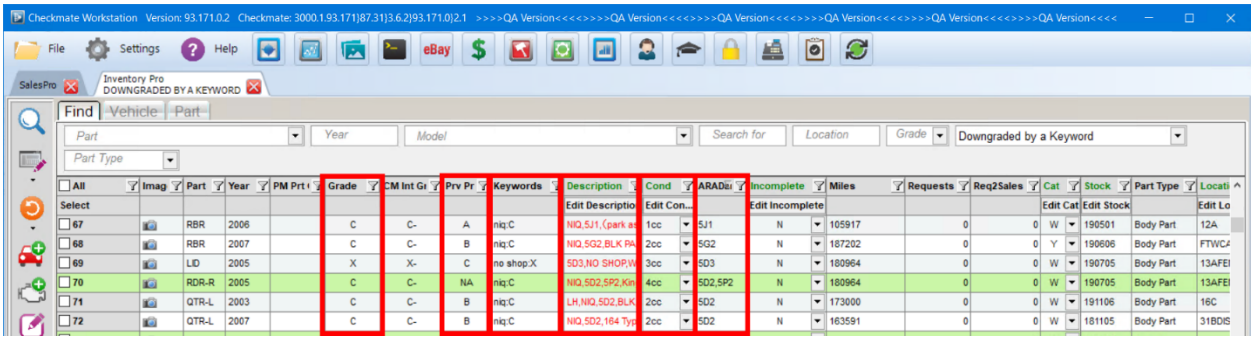
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **DOWNGRADED BY A KEYWORD**.



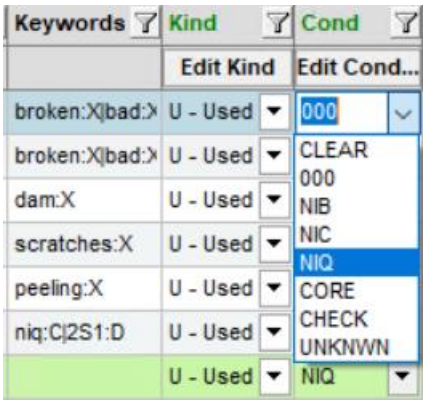
The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Downgraded by a Keyword**. (It may take several seconds to load.)

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.

   Your search results display parts that were downgraded because of a keyword.
5. Choose a part to work with, and review the information for the part,
   - Check the **Keywords** column to see which keywords caused Checkmate to downgrade or ungrade the part.
   - Check the **Cond.** (condition) column to see if those keywords are reflected in the part's Condition.



6. Edit the part information. Be sure to set the part's **Cond.** field to a value that matches the damage described in the **Description**. This may mean changing the **Cond.** from mileage or damage units to **NIB** (for B grade parts) or **NIQ** (for C grade parts).



7. Repeat steps 5-6 for each part.
8. When you're finished, click the save button. When you do, the corrected parts' **Descriptions** will turn from red to black, showing there is no longer an inconsistency.

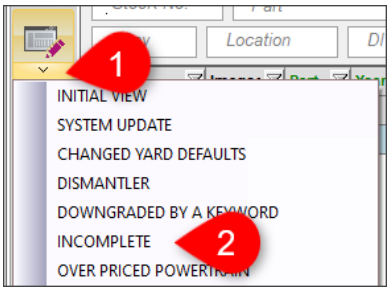
INCOMPLETE View

Purpose: Improve inventory information. This View searches for parts that Checkmate suspects may be incomplete (and has ungraded). This is either because a keyword in the part's **Description** suggests the part is incomplete, or, in the case of assemblies, one or more components were added to a work order or deleted from inventory.

Goal: Review parts, determine whether they are complete or incomplete, and edit them accordingly.

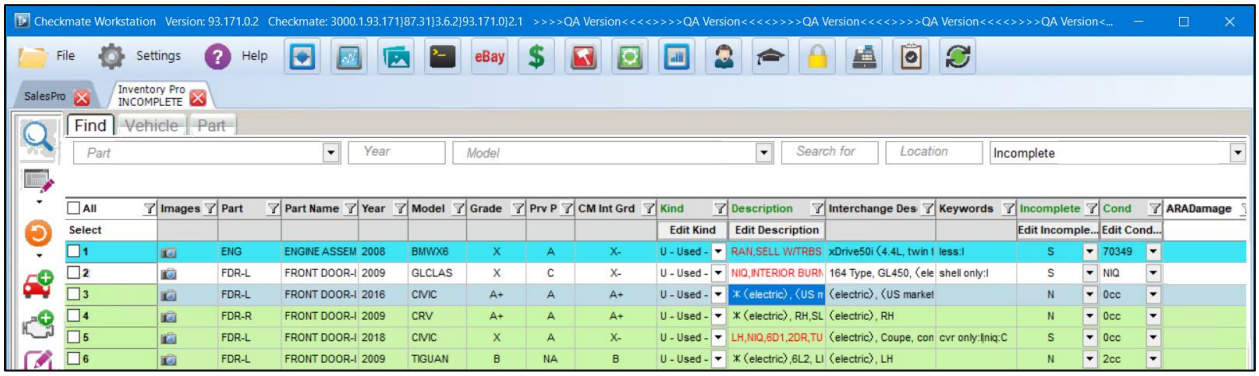
To use this View, follow these steps:

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



The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Incomplete**. (It may take several seconds to load.)

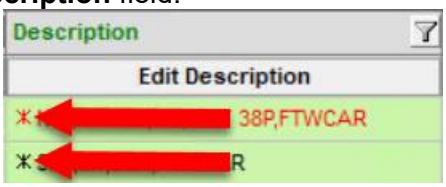
3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.
5. Choose a part to work with and review the information for the part:
   - If the **Description** begins with an asterisk (*), follow the steps in the **Assemblies Made Incomplete by Work Orders or a Part Delete** section below.
   - If the **Description** is red, follow the steps in the **Parts Marked Incomplete by a Keyword** section below.



6. Repeat step 5 for each part.
7. When you're finished, click the save button.

Assemblies Made Incomplete by Work Orders or a Part Delete

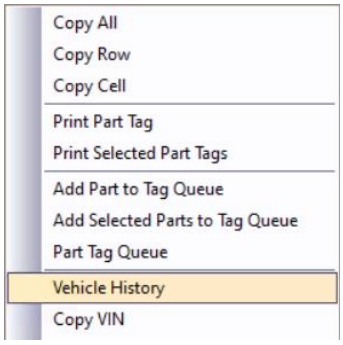
Assemblies that have had a component added to a work order or deleted from inventory will be marked with an asterisk (*) at the beginning of the **Description** field.



When the assembly component was added to a work order or deleted from inventory, the main piece assembly was ungraded by Checkmate and now appears in the INCOMPLETE View for you to review and acknowledge the grade.

To review an assembly and determine if it is complete or incomplete:

1. Right-click the line for the part you want to work on.
2. In the menu that appears, click **Vehicle History**.



3. The **Vehicle History** window appears. Use the information on the **Parts Sold** and **Parts Remaining** tabs to determine if the assembly is still complete. Then **Close** this window.

Date	Part	Model	Year	Account	Name	Invoice	Price	Yard
10/31/201	CAL	CIVIC	2016	R00407	STOM MOTORS	135996	$45.00	999
10/31/20	CAL	CIVIC	2016	R00407	STOM MOTORS	135996	$45.00	999
04/03/2018	CVC	CIVIC	2016	R001013	NITED CATALYST CORP.	127346	$71.00	999
11/26/2018	DMR	CIVIC	2016	OH8218	YOMING AUTOMOTIVE	130850	$100.00	999
07/09/2018	DMR	CIVIC	2016	KY0218	& R AUTOMOTIVE	128729	$100.00	999
12/11/2019	FDR	CIVIC	2016	R001120	FLORAS AUTO PARTS	136735	$550.00	999
08/26/2019	FDW	CIVIC	2016	G2489	FRAMEWORKS INC.	135061	$100.00	999
09/10/2019	GLB	CIVIC	2016	KY238	AUTO BODY PRO	135243	$75.00	999
12/28/2017	HLP	CIVIC	2016	G2489	FRAMEWORKS INC.	125835	$125.00	999
12/28/2017	HLP	CIVIC	2016	G2489	FRAMEWORKS INC.	125837	($125.00)	999
11/09/2017	LAB	CIVIC		R00193	NO INFO TAXABLE	125205	$0.00	999
12/27/2017	QWN	CIVIC	2016	R00203	WALK IN NON TAXABLE	125816	$45.00	999
11/16/2017	RMD	CIVIC	2016	TN2115	E AND S AUTO SALES	125296	$100.00	999
02/08/2018	WHL	CIVIC	2016	INF112	INFO NONTAX	126450	$75.00	999
02/21/2018	WHL	CIVIC	2016	INF112	INFO NONTAX	126655	$85.00	999
07/03/2018	WHL	CIVIC		KY238	AUTO BODY PRO	128684	$40.00	999

4. Set the part options appropriately:

   - If you determine that the assembly is in fact incomplete, **the best practice is to delete the assembly from your inventory, and then inventory the remaining components individually**[*].
     - With the part selected, click the delete/trash can button.
     - Click the add part button to inventory an individual component. Repeat as necessary.
   - If you determine the assembly is in fact incomplete, but you do not wish to delete or add parts to your inventory at this time, you can mark the part as incomplete. This will keep your Checkmate inventory data and your online listings accurate.
     - Make sure the **Incomplete** column is set to **Y**.
     - If you don't want to review this incomplete assembly again in future audits, go to the **Grade Ok** column and select **Grade Ok**.

     When you save, the assembly is no longer considered complete, and remains ungraded.

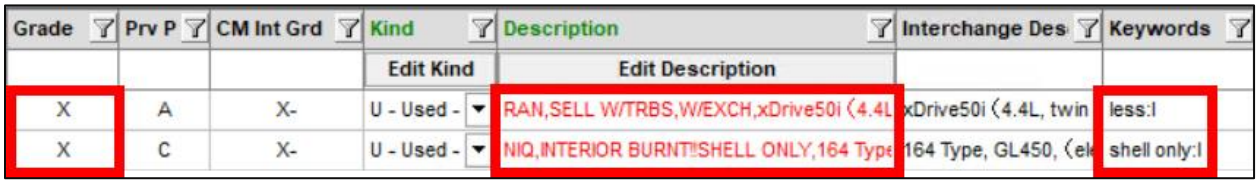
   - If you determine that the assembly is complete:
     - Make sure the **Incomplete** column is set to **N**.
     - Confirm the grade in the **Grade** column: go to the **Grade Ok** column, and select **Grade Ok**.

     The part will no longer appear in future audits.

[*] Incomplete assemblies are less visible on Car-Part.com marketplaces. Incomplete assemblies are given a grade of X. On Car-Part.com X grade parts are typically sorted to the end of search results, and on Car Part Pro most shoppers have them hidden from search results.

Parts Marked Incomplete by a Keyword

- If Checkmate considers a part incomplete because of a keyword in the **Description**, that **Description** will appear red.
- The keyword(s) appear in the **Keyword** column for the part, and these parts have been ungraded by Checkmate.



Grade	Prv P	CM Int Grd	Kind	Description	Interchange Des	Keywords
			Edit Kind	Edit Description		
X	A	X-	U - Used -	RAN,SELL W/TRBS,W/EXCH,xDrive50i (4.4L	xDrive50i (4.4L, twin	less:I
X	C	X-	U - Used -	NIQ,INTERIOR BURNT!!SHELL ONLY,164 Type	164 Type, GL450, (el	shell only:I

Review the descriptions to determine if the part is complete.

If the part *is* incomplete:

- In the **Incomplete** column, click the drop-down arrow and select **Y**. This will mark the part as incomplete, and it will no longer appear on the **INCOMPLETE** View in the future.

If the part is *not* incomplete:

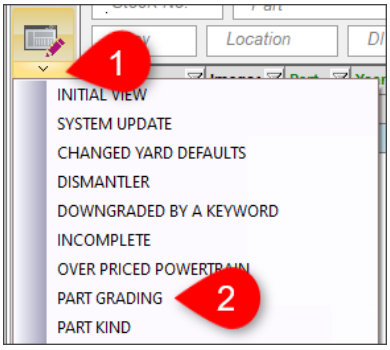
- Edit the part **Description** to reflect the part accurately.

PART GRADING View

Purpose: General purpose View useful for reviewing and editing grades of parts in your inventory. Many search fields are available in this View to help you “drill down” to specific parts, issues, and reasons for grade change.

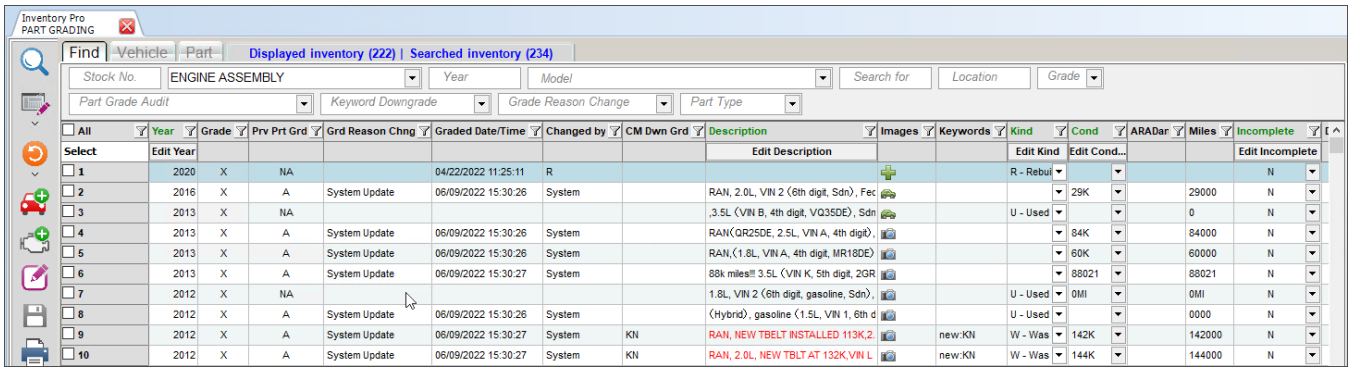
To use this View, follow these steps:

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



The search fields and information columns are rearranged according to the View. (It may take several seconds to load.)

3. Enter your search criteria in the available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.



5. Review and edit parts as desired.
6. When you’re finished, click the save button.

PART KIND View

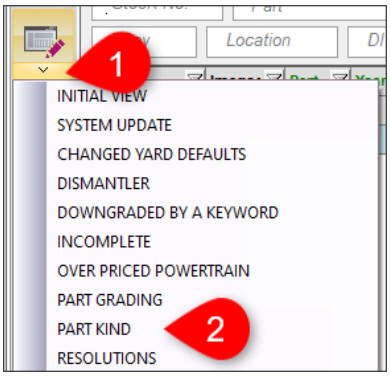
Purpose: Ensure all parts in your inventory are inventoried with the correct **Kind**. Improve inventory information. Searches for parts that were ungraded because a keyword indicates that the part's **Kind** is different than the **Kind** entered when the part was inventoried, or the part was inventoried without a **Kind**.

For example: If you inventoried a headlamp assembly as a **U – Used – OEM** part, but its description contains the word "AFTERMARKET," Checkmate will ungrade the part, due to the conflicting information, and the part will appear in this View.

Goal: Add, edit, or confirm the part's **Kind**.

To use this View, follow these steps:

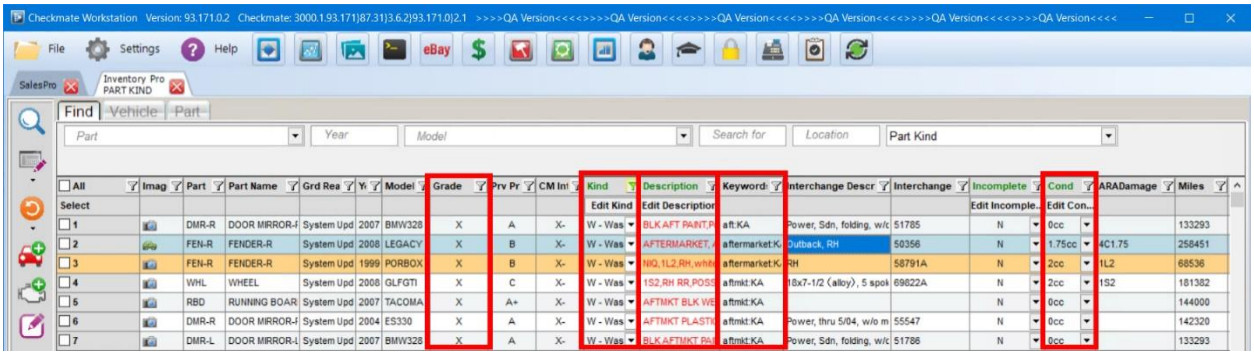
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **PART KIND**.



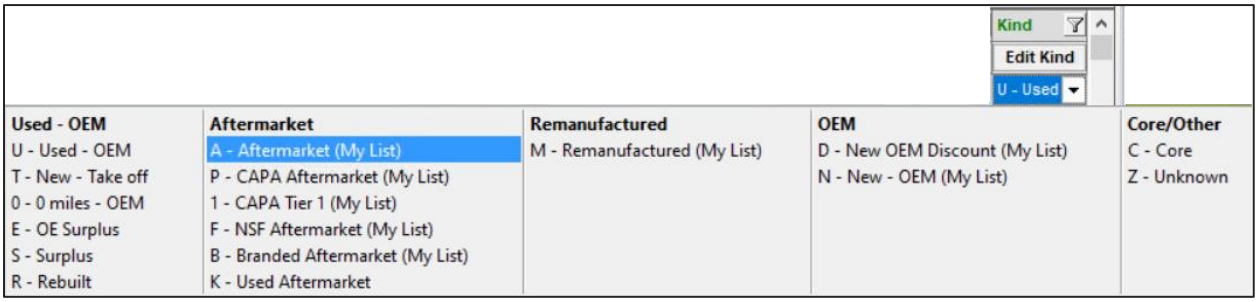
The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Part Kind**. (It may take several seconds to load.)

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.

   Your search results display parts with keywords in their descriptions that suggest the assigned kind is incorrect.



5. Choose a part to work with, and review the information for the part. Check the **Keyword** column to see what words in the part's description suggest the Kind is incorrect.
    - If the **Kind** is incorrect, use the dropdown in the **Kind** column to change it to the correct kind.



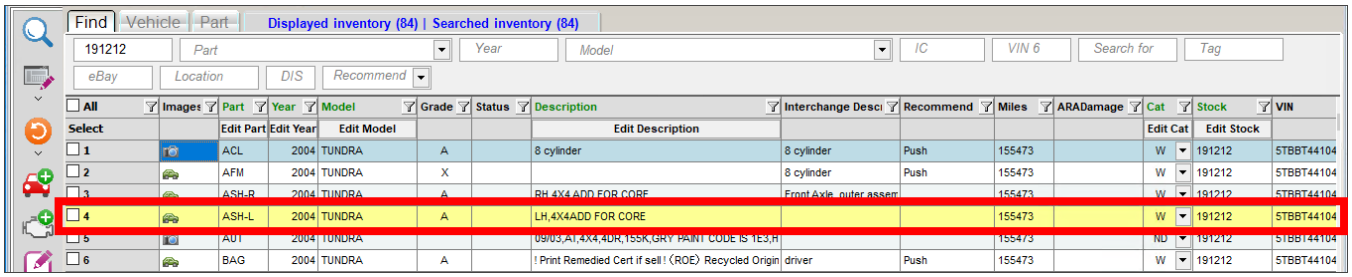
    - If the **Kind** is correct, edit the **Description** to remove the triggering keyword(s).
6. Repeat step 5 for each part.
7. When you're finished reviewing parts, click the save button.

RESOLUTIONS View

Purpose: Improve inventory information.

Goal: Assign interchange to 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 Inventory Pro. 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.

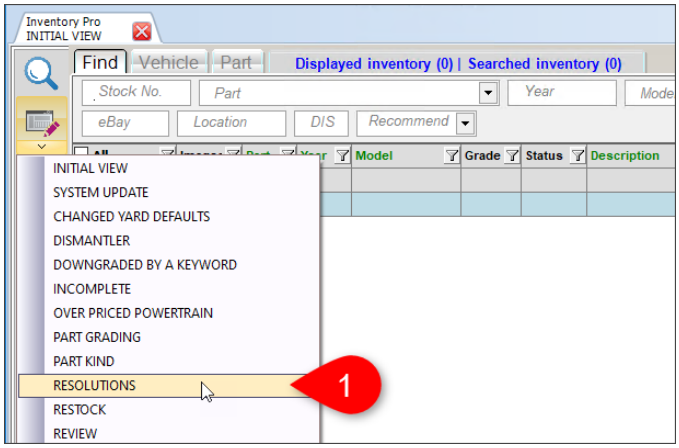
There are several things that cause parts to be put in resolution:

- 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. SmartVin* 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** function† 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
- In rare cases, a part code may be split into separate codes after a new interchange release.

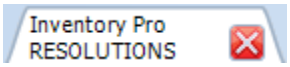
* SmartVin is a Car-Part.com-exclusive technology that realizes the interchange number for many parts directly from the VIN, so that inventorying or searching for parts is simplified.
† Access this in Checkmate Retro (Checkmate Full: **6,17** or Checkmate Classic: **U11,11** or Checkmate Junior: **6,11**).

To review **Resolution Parts**, follow these steps:

1. On the **Find** tab, click the down arrow on the select View button , and choose **RESOLUTIONS.** (It may take several seconds to load.)

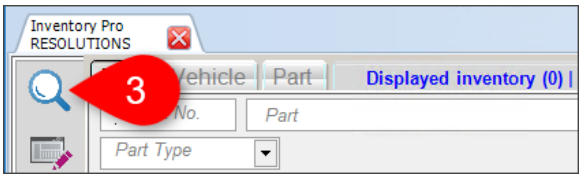


2. The search fields and columns are rearranged according to the RESOLUTIONS view. (Notice that the text on the Inventory Pro tab reflects the view.)



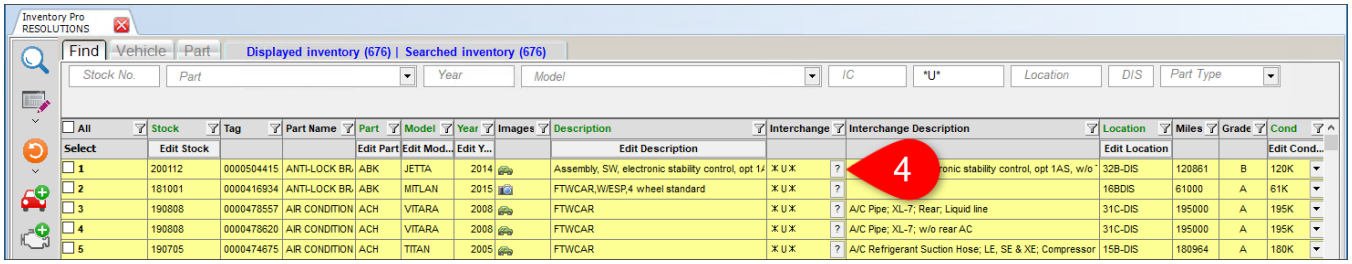
   Optional: You can use the search fields at the top of the tab to limit your search by **Stock**, **Part**, **Year**, **Model**, **Location**, or **DIS** (Days in Stock). For example, if you only want to see your engines that are in resolution, set the **Part** field to **ENG**.

3. Click the magnifying glass button to search your inventory for your Resolution Parts.



4. Your Resolution Parts display. In the **Interchange** column, click the question mark button ? to assign interchange to a part.

   - To make it easier to work on Resolution Parts, you may find it helpful to use your filters. For example, it may be helpful to filter your parts to a specific location or part code.
   - If you need more information to determine the correct interchange option, you can click to highlight a part and then click the info button on the left side of the window to see information about the vehicle the part is from.

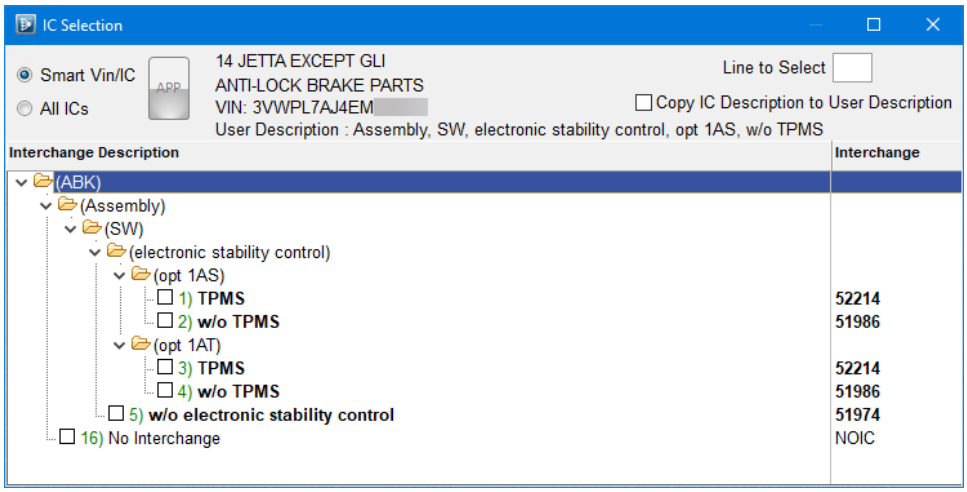


Note: You can also double-click a part to open the part for editing on the **Part – Edit** tab, and select interchange for the part from there.

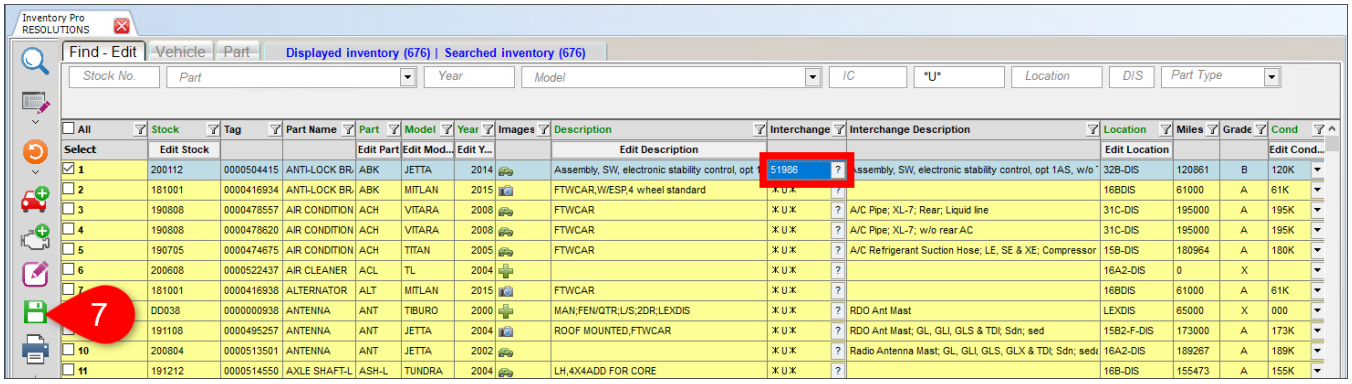
5. The **IC Selection** window opens. To choose an interchange option:
    - Click the checkbox for the interchange option you want to assign to this part (you will be returned to the **Find** tab).

      Or
    - In the **Line to Select** field, type the line number for the option you want to select and press **Enter** to return to the **Find** tab.

    Important! Be sure to review the description carefully before selecting an interchange number. In some cases, there may not be an appropriate interchange choice available for your part (even if there is only one available). In this case, refer to the **How to Review Resolution Parts** guide for more information.



    On this window, you can also:
    - Limit interchange choices by SmartVin 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**.
6. Repeat steps 4-5 to review all Resolution Parts.
7. Click the save button to make these changes 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

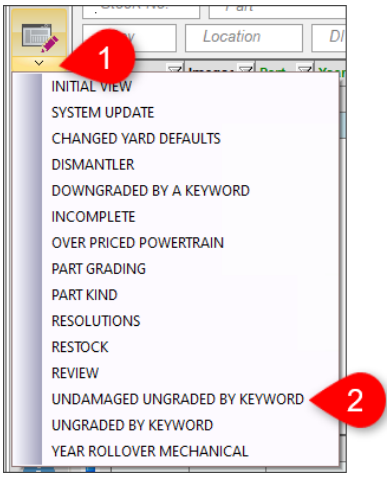
UNDAMAGED UNGRADED BY KEYWORD View

Purpose: Improve inventory information. This View searches for parts that were marked undamaged, *but* have keywords in the part **Description** that indicate damage may exist. This inconsistency caused Checkmate to ungrade these parts until the inconsistency is fixed.

Goal: Locate and correct inconsistent part information so parts are graded accurately.

To use this View, follow these steps:

1. On the **Find** tab, click the down arrow on the select View button.
2. Select **UNDAMAGED UNGRADED BY KEYWORD**.

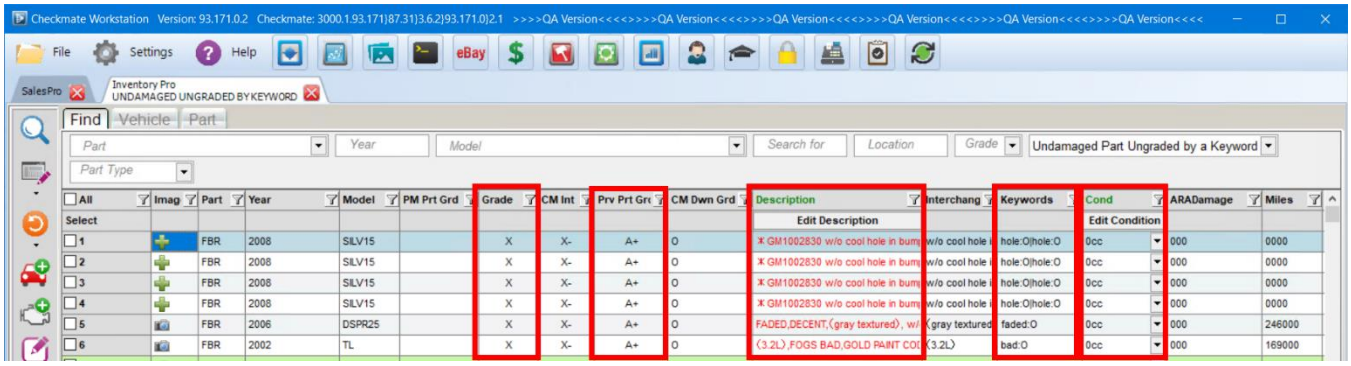


   The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Undamaged Part Ungraded by a Keyword**. (It may take several seconds to load.)

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.

   Your search results display parts that were marked undamaged, *but* have keywords in the part **Description** that indicate damage may exist

5. Choose a part to work with, and review the information for the part:
    - Check the **Keywords** column to see which word(s) caused Checkmate to ungrade that part.
    - Check the **Prv Prt Grade** (Previous Part Grade) column to see how the part was graded before Checkmate ungraded the part.
    - Use this information to determine whether you need to edit the damage/condition, *or* edit the **Description** to more accurately reflect the part.



6. Edit the part as appropriate.
7. Repeat steps 5-6 for each part.
8. When you're finished, click the save button.

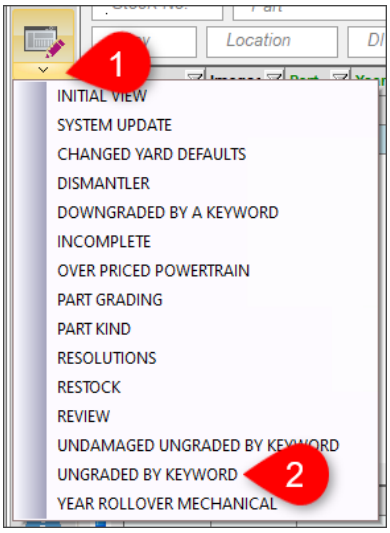
UNGRADED BY KEYWORD View

Purpose: Improve inventory information. This View searches for parts that were ungraded because of a keyword in the part **Description**. This keyword could suggest damage inconsistent with the **Condition** field, could suggest the part has already been sold, etc.

Goal: Correct inconsistent part information.

To use this View, follow these steps:

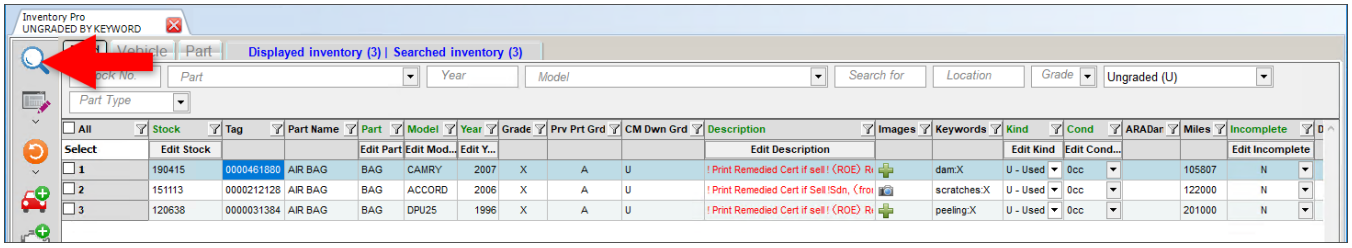
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **UNGRADED BY KEYWORD**.



The search fields and information columns are rearranged according to the View, and the **Downgrade Indicator** search field is set to **Ungraded (U)**. (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 to search your inventory according to the search fields.

   Your search results display parts that were ungraded because of a keyword.



5. Choose a part to work with, and review the information for the part:
6. If there is inconsistent information for the part, edit the part as necessary to more accurately reflect the part.
7. Repeat steps 5-6 for each part.
8. When you're finished, click the save button.

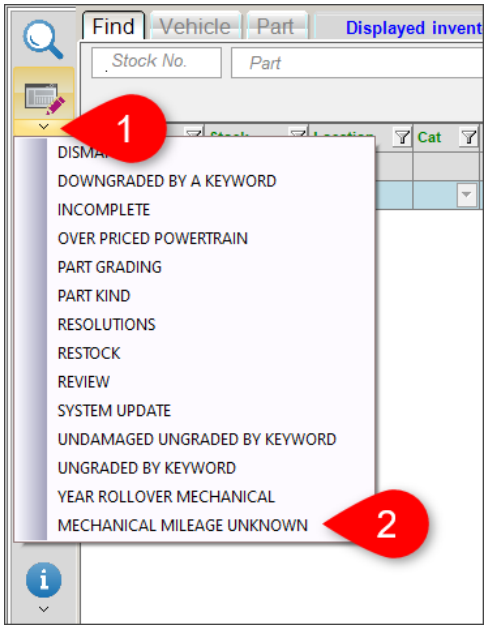
MECHANICAL MILEAGE UNKNOWN View

Purpose: Improve inventory information. This View searches for mechanical parts that do not have mileage designated.).

Goal: Add mileage to parts (when possible) so the parts are graded.

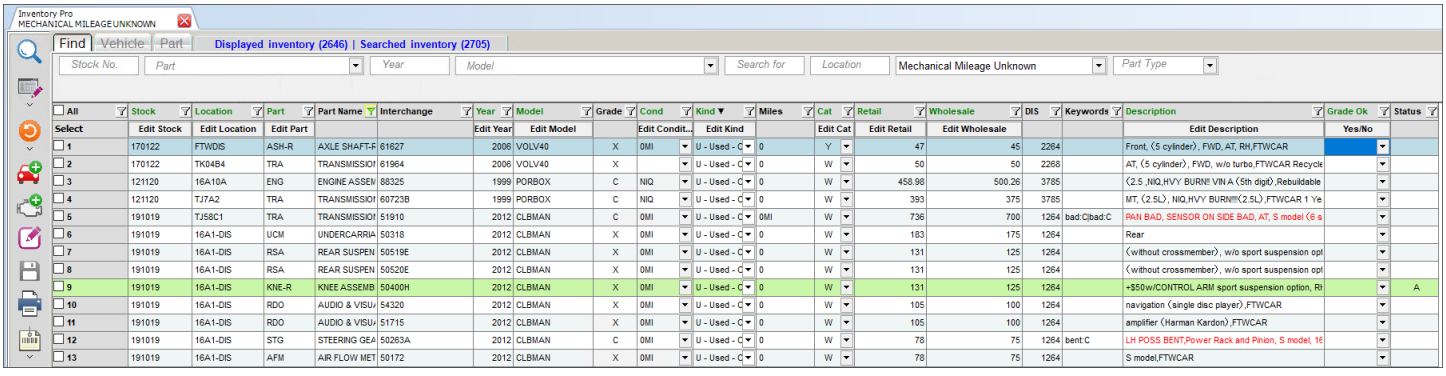
To use this View, follow these steps:

1. In Inventory Pro, on the **Find** tab, click the down arrow on the select View button.
2. Select **Mechanical Mileage Unknown**.



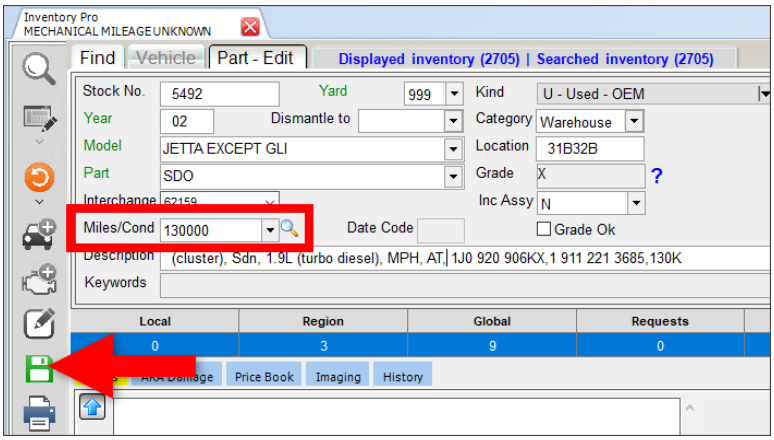
The search fields and information columns are rearranged according to the View, and the **Part Grade Audit** search field is set to **Mechanical Mileage Unknown**. (It may take several seconds to load.)

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.
5. When your search results display, choose a part to work with, and research the part to try to determine the mileage.

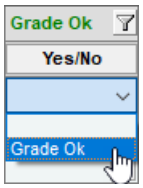


- To see more information about the part and the vehicle on the **Vehicle History** window, click the blue info button.

6. Add mileage for the part, if possible:
    - Double-click the part to open it for editing on the **Part – Edit** tab. Type the mileage in the **Miles/Cond** field, and then click the save button to return to your search results on the **Find** tab.



    - If you are unable to determine mileage for the part (or if the part doesn't have miles), and you no longer want the part to appear on any audits, mark it as **Grade Ok**.
        - Single part: In the **Grade Ok** column, click the drop-down arrow, and select **Grade Ok**.
        - Multiple parts: Check the checkboxes in the **Select** column, then click the **Grade Ok** column's **Yes/No** button to bulk edit all of these parts.



7. Repeat step 5-6 for each part.
8. When you're finished, click the save button.

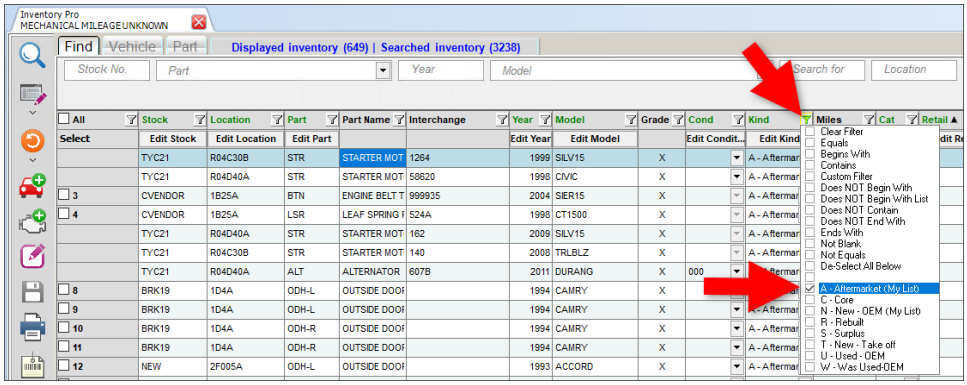
Filter and Remove Part Kinds with No Miles from Mechanical Mileage Unknown View

For some part kinds (e.g., aftermarket or remanufactured), mileage is not applicable. If you have a lot of these parts in the **Mechanical Mileage Unknown** View, you can mark them as **Grade Ok** so they will not appear in any audits in the future. To do so:

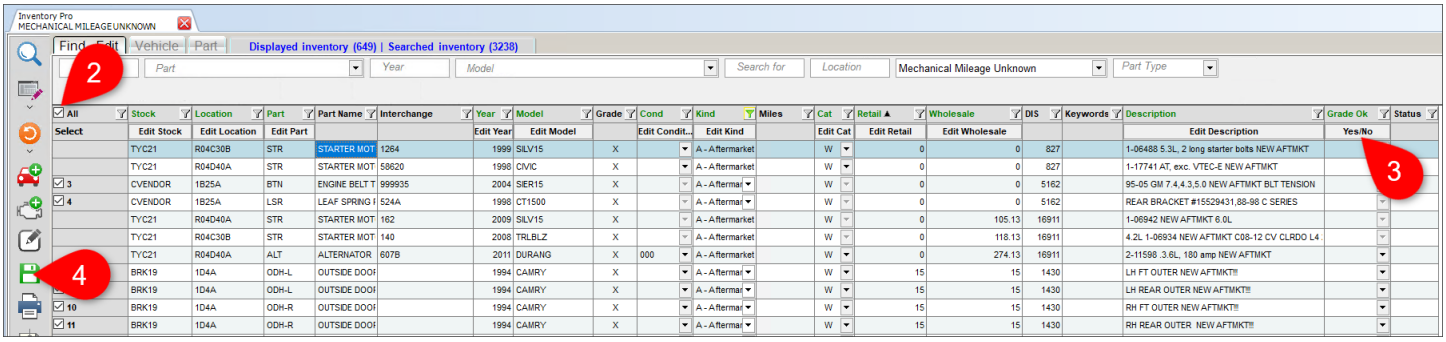
1. After you've selected the MECHANICAL MILEAGE UNKNOWN View (following steps 1-4 of the previous section), filter your search results to show only these part Kinds that have no mileage.

   At the top of the **Kind** column, click the filter icon and check the boxes to display *only* the part kinds with no mileage that you want to remove from this view (e.g., **A – Aftermarket (My List)**).

   Your results will be filtered to display only the part kinds that you selected.



2. On the top left, check the **All** checkbox to select all visible parts.
3. In the **Grade Ok** column, click the **Yes/No** button so **Grade Ok** displays in this column.



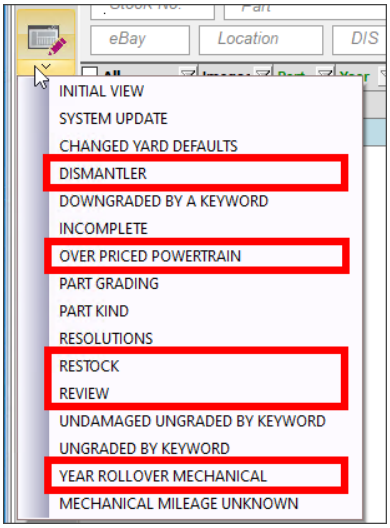
4. Click the save button. These parts will no longer appear in future audits.

Inventory Management Views

The Views described in the previous sections are designed to help you fix missing or inconsistent part information. There are several other Views available in Inventory Pro that are designed to help you with various other inventory management tasks, like reviewing newly inventoried vehicles, restocking parts, etc. These Views include:

- DISMANTLER
- OVER PRICED POWERTRAIN
- RESTOCK
- REVIEW
- YEAR ROLLOVER MECHANICAL

You can access these Views by clicking the down arrow on the select View icon.



The following sections describe these Views.

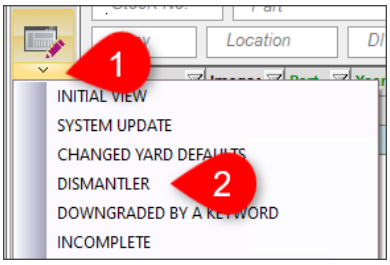
DISMANTLER View

Purpose: Determine which vehicles and/or parts to prioritize during dismantling. This View makes it easy to search by vehicle or by part, and includes quantity on hand, price, and request information to help locate and prioritize sales opportunities.

Goal: Help you make decisions about which vehicles and/or parts to dismantle.

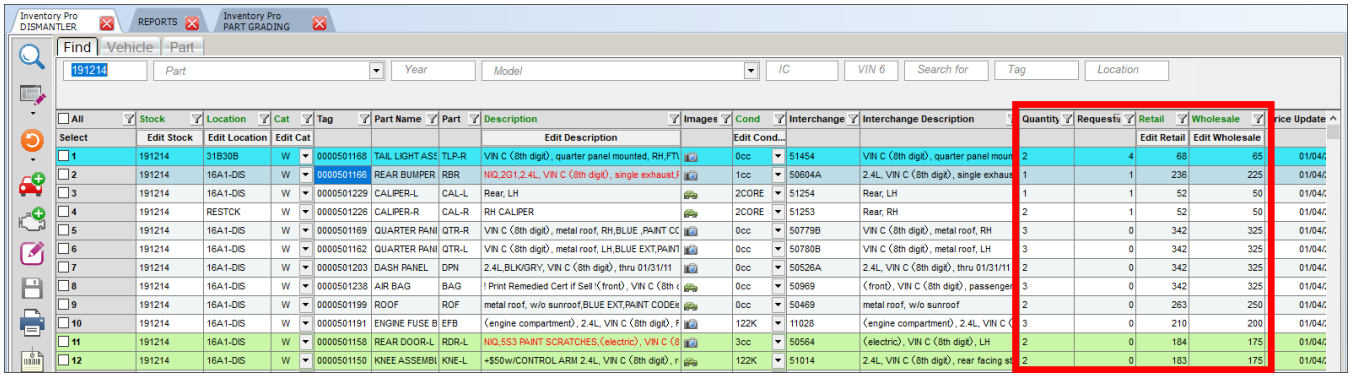
To use this View, follow these steps:

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



The search fields and information columns are rearranged according to the View. (It may take several seconds to load.)

3. Limit your search by entering the criteria you want to search by in the available search fields. You can enter a **Stock No.** to examine a specific vehicle, select a **Part** to look at a specific part type, and/or use another search field.
4. Click the magnifying glass button to search your inventory according to the search fields.
5. Your search results display. Examine your **Quantity**, **Requests**, prices, and other part information to determine what to prioritize in dismantling.



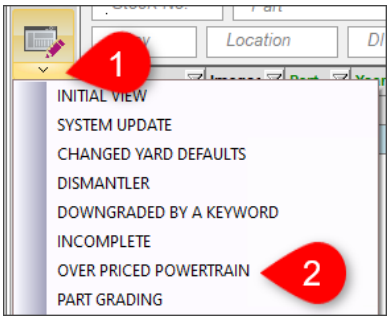
OVER PRICED POWERTRAIN View

Purpose: Identify powertrain parts that may be overpriced. This View includes the **Recommend** search field, with the **$OVER** option preselected, which filters for parts that Checkmate has determined may be overpriced, due to many requests and few sales for these parts at your business.

Goal: Review and reprice powertrain parts that may need prices adjusted.

To use this View, follow these steps:

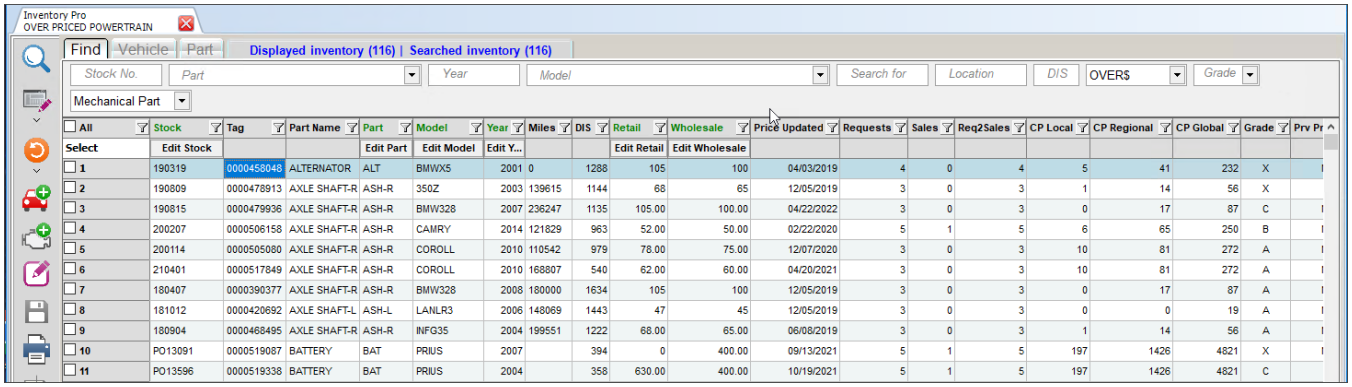
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **OVER PRICED POWERTRAIN**.



The search fields and information columns are rearranged according to the View, and the following search fields are set as follows (it may take several seconds to load):

- **Recommend** search field is set to **$OVER**.
- **Part Type** search field is set to **Mechanical Part**.

3. (Optional) If desired, limit your search further by entering criteria in the other available search fields.
4. Click the magnifying glass button to search your inventory according to the search fields.
5. (Optional) Click the **Price Updated** column header to sort your search results by most recently priced or least recently priced.
6. Choose a part to work with, and review the information for the part. The **Price Updated** column will show you the date each part was last priced. If you agree with Checkmate's assessment that the part is overpriced, edit the price as necessary.



All	Stock	Tag	Part Name	Part	Model	Year	Miles	DIS	Retail	Wholesale	Price Updated	Requests	Sales	Req2Sales	CP Local	CP Regional	CP Global	Grade	Prv Pr
Select	Edit Stock			Edit Part	Edit Model	Edit Y...			Edit Retail	Edit Wholesale									
1	190319	0000458048	ALTERNATOR	ALT	BMWX5	2001	0	1288	105	100	04/03/2019	4	0	4	5	41	232	X	
2	190809	0000478913	AXLE SHAFT-R	ASH-R	350Z	2003	139615	1144	68	65	12/05/2019	3	0	3	1	14	56	X	
3	190815	0000479936	AXLE SHAFT-R	ASH-R	BMW328	2007	236247	1135	105.00	100.00	04/22/2022	3	0	3	0	17	87	C	
4	200207	0000506158	AXLE SHAFT-R	ASH-R	CAMRY	2014	121829	963	52.00	50.00	02/22/2020	5	1	5	6	65	250	B	
5	200114	0000505080	AXLE SHAFT-R	ASH-R	COROLL	2010	110542	979	78.00	75.00	12/07/2020	3	0	3	10	81	272	A	
6	210401	0000517849	AXLE SHAFT-R	ASH-R	COROLL	2010	168807	540	62.00	60.00	04/20/2021	3	0	3	10	81	272	A	
7	180407	0000390377	AXLE SHAFT-R	ASH-R	BMW328	2008	180000	1634	105	100	12/05/2019	3	0	3	0	17	87	A	
8	181012	0000420692	AXLE SHAFT-L	ASH-L	LANLR3	2006	148069	1443	47	45	12/05/2019	3	0	3	0	0	19	A	
9	180904	0000468495	AXLE SHAFT-R	ASH-R	INFG35	2004	199551	1222	68.00	65.00	06/08/2019	3	0	3	1	14	56	A	
10	PO13091	0000519087	BATTERY	BAT	PRIUS	2007		394	0	400.00	09/13/2021	5	1	5	197	1426	4821	X	
11	PO13596	0000519338	BATTERY	BAT	PRIUS	2004		358	630.00	400.00	10/19/2021	5	1	5	197	1426	4821	C	

7. Repeat step 6 for each part as desired.
8. When you're finished, click the save button.

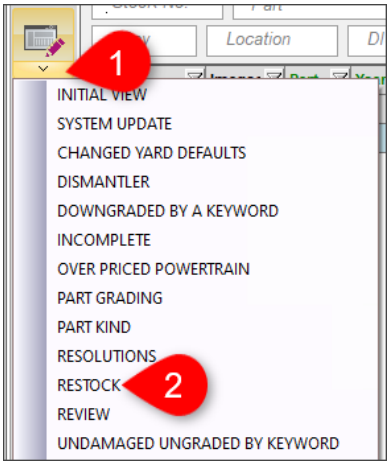
RESTOCK View

Purpose: Help you find parts that need to be restocked. This View searches for parts with **RESTCK** as the **Location.***

Goal: Restock parts.

To use this View, follow these steps:

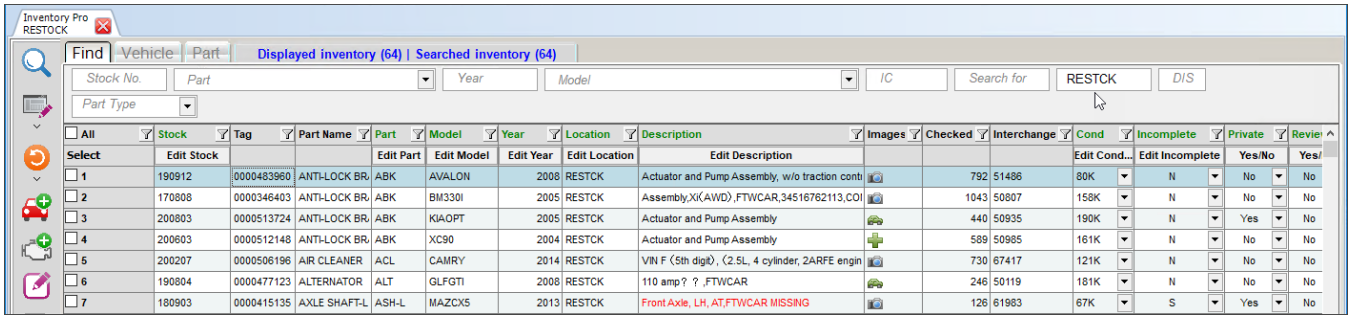
1. On the **Find** tab, click the down arrow on the select View button.
2. Select **RESTOCK**.



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 to search your inventory according to the search fields.

   Your search results display parts that need to be restocked.

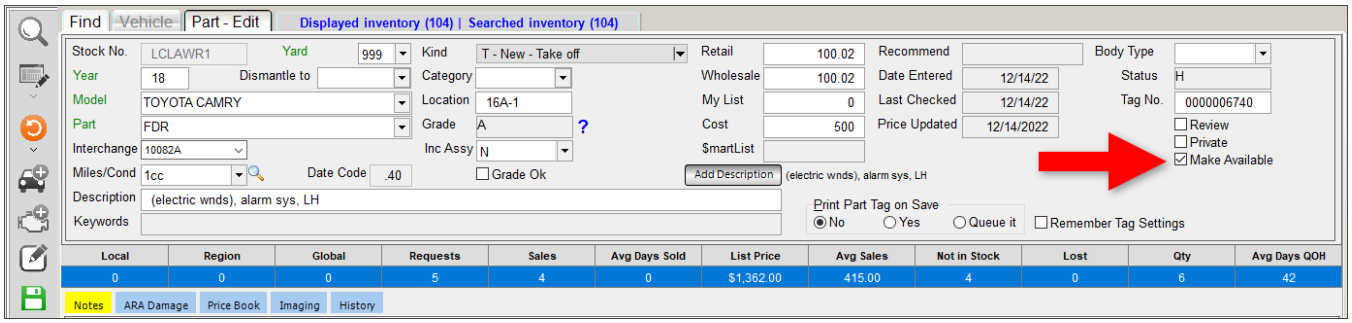


All	Stock	Tag	Part Name	Part	Model	Year	Location	Description	Images	Checked	Interchange	Cond	Incomplete	Private	Revie
Select	Edit Stock			Edit Part	Edit Model	Edit Year	Edit Location	Edit Description				Edit Cond...	Edit Incomplete	Yes/No	Yes/
1	190912	0000483960	ANTI-LOCK BR	ABK	AVALON	2008	RESTCK	Actuator and Pump Assembly, w/o traction conti		792	51486	80K	N	No	No
2	170808	0000346403	ANTI-LOCK BR	ABK	BM330I	2005	RESTCK	Assembly,Xi(AWD),FTWCAR,34516762113,COI		1043	50807	158K	N	No	No
3	200803	0000513724	ANTI-LOCK BR	ABK	KIAOPT	2005	RESTCK	Actuator and Pump Assembly		440	50935	190K	N	Yes	No
4	200603	0000512148	ANTI-LOCK BR	ABK	XC90	2004	RESTCK	Actuator and Pump Assembly		589	50985	161K	N	No	No
5	200207	0000506196	AIR CLEANER	ACL	CAMRY	2014	RESTCK	VIN F (5th digit), (2.5L, 4 cylinder, 2ARFE engin		730	67417	121K	N	No	No
6	190804	0000477123	ALTERNATOR	ALT	GLFGTI	2008	RESTCK	110 amp? ? ,FTWCAR		246	50119	181K	N	No	No
7	180903	0000415135	AXLE SHAFT-L	ASH-L	MAZCX5	2013	RESTCK	Front Axle, LH, AT,FTWCAR MISSING		126	61983	67K	S	Yes	No

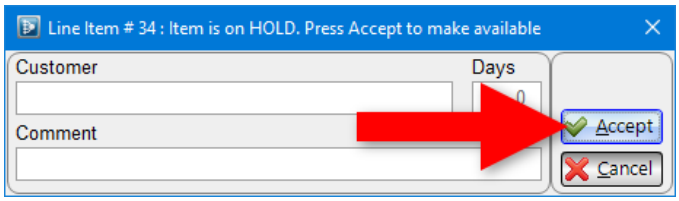
5. Choose a part to work with. Click inside the **Location** field and type the new location.

* Settings for restocking can be accessed in Checkmate Retro using the **Change Invoicing** function (Checkmate Full: **6,10,1** or Checkmate Classic: **S3,1** or Checkmate Junior: contact support.)

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 to 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.



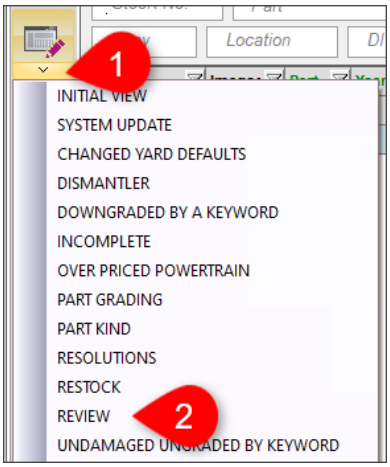
    d. Click the save button to return to the **Find** tab.
7. Repeat steps 5 & 6 for each part you want to restock.
8. When you're finished restocking parts, click the save button.

REVIEW View

Purpose: Review newly-inventoried vehicles.

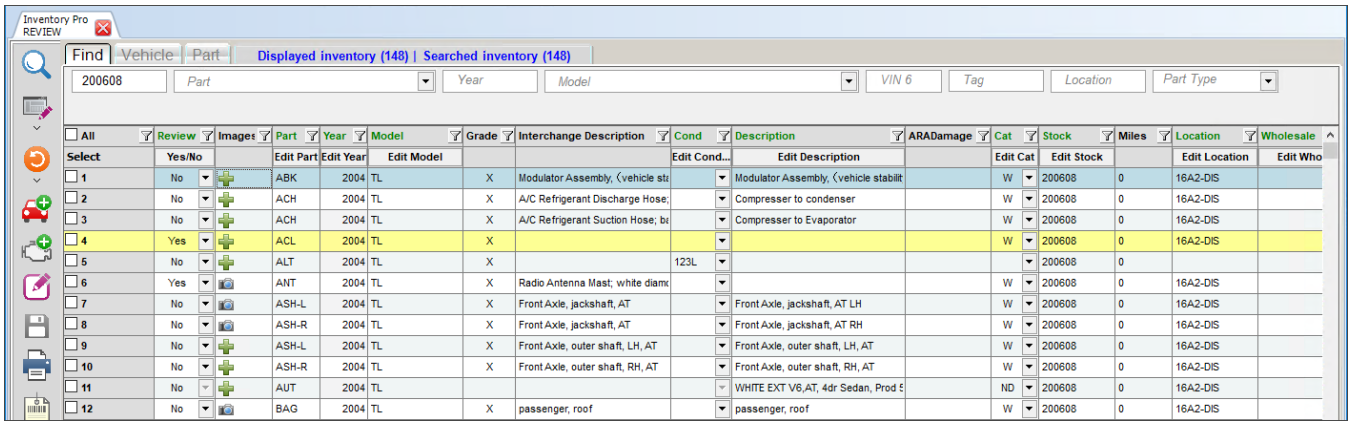
To use this View, follow these steps:

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



The search fields and information columns are rearranged according to the View. (It may take several seconds to load.)

3. Type the stock number for a vehicle you want to review in the **Stock No** field.
4. Click the magnifying glass button to search your inventory according to the search fields.



5. Review and edit parts as desired.
6. When you're finished, click the save button.

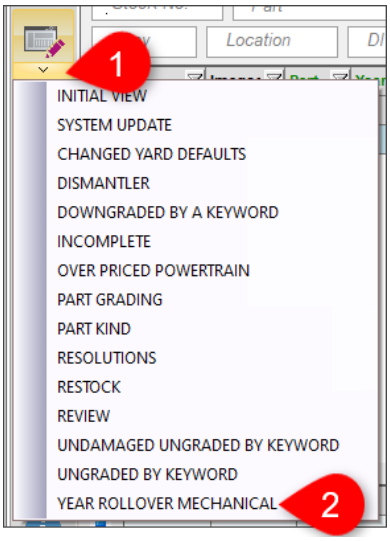
YEAR ROLLOVER MECHANICAL View

Purpose: Identify mechanical parts for which Checkmate has changed the part grade, because the calendar year has changed. (The grading standards for mechanical parts are partially based on the mileage “per year.”)

Goal: Review year rollover grade changes made by Checkmate.

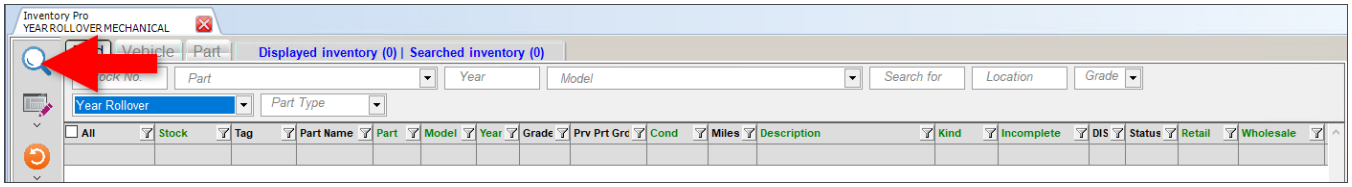
To use this View, follow these steps:

1. On the **Find** tab, click the down arrow on the select View button.
2. Select **YEAR ROLLOVER MECHANICAL**.



The search fields and information columns are rearranged according to the View, and the **Grade Reason Change** search field is set to **Year Rollover**. (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 to search your inventory according to the search fields.



5. If the search returns results, review the parts that have had a grade change because of a year rollover.

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

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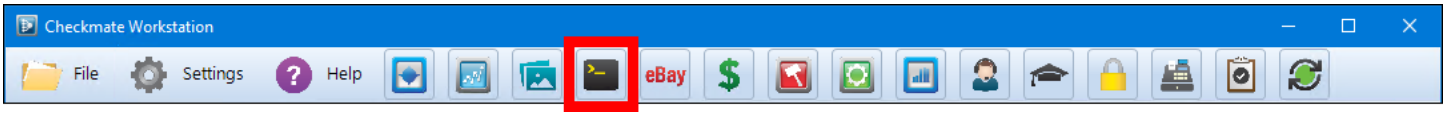
Checkmate Retro

There are some functions that currently rely on the Checkmate Retro interface. We are working to get these functions into Inventory Pro, but you currently have to switch over to the Retro version of Checkmate in order to perform certain tasks. To find out more about these functions, go to products.car-part.com/checkmate/training.html and locate the **Retro & Miscellaneous** section for training materials.

To switch over to the Checkmate Retro interface, click the **Checkmate Retro** button in the Checkmate Workstation toolbar. After you have completed these tasks, close the **Terminal** tab and return to the **Inventory Pro** tab.



The following inventory functions must be completed in the Retro version of Checkmate:

	Checkmate Full menu option	Checkmate Classic menu option	Checkmate Junior menu option
• Print Backorders	**2,7**	**K**	**2,7**
• Print Inventory Reports	**2,8**	**U20**	**2,8**
• Print Title Report	**2,13**	**U21**	**2,13**
• Enter Assembly Table	**2,16**	**S7,22**	contact support
• Print Buying Guide	**2,18**	**V18**	**2,18**
• Bar-code Scanner Processing	**2,19**	**I23**	**2,19**
• Shipping Notification Inquiry	**2,20**	**I24**	**2,20**
• Location/Category Table Maint	**2,21**	**I25**	**2,21**

Appendix A: Part Information Columns

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

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 columns in the Initial View (regardless of which View you are currently using).
3. Click **Close**.
4. If you want to save this configuration for future use, follow the steps in the section of this guide called: **Creating and Saving Custom Views**.

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, requests, and sales history.

  Selling recommendations:
    - **EXTRA** – Based on your current inventory and number of requests, you don't need to inventory more of this part.
    - **FIRM$** – 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.
    - **NEED** – You don't have this part in stock, and the model year of the part has had sales (this Status will only be visible on Extra Sale lines).

- **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.

Pricing recommendations:

- **LOW$** – You sell this part more often than expected which may indicate the price is too low and should be raised.
- **OVER$** – You have lost sales for this part (the part was looked up but was not sold) which may indicate the price is too high and should be lowered.

Scrapping/Dismantling recommendations:

- **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 (in the time period that you display sales information for).
- **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 in Checkmate but do not show online in Car-Part.com marketplaces.
  - **I** – Invoice. This part is on an invoice, but the invoice has not yet been posted. These parts display red in search results in Checkmate but do not show online in Car-Part.com marketplaces.
  - **S** – Sold. This part has been sold and the invoice has been posted. These parts display red in search results in Checkmate but do not show online in Car-Part.com marketplaces.
  - **W** – Work Order. This part is on a work order. These parts display red in search results in Checkmate but do not display online in Car-Part.com marketplaces.
  - **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 in Checkmate but do not show online in Car-Part.com marketplaces.
  - **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.
- **Retail** – Retail price of the part
- **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)
    - **Used – OEM**
        - **U** – Used OEM
        - **T** – New take off
        - **0** – Zero miles OEM
        - **E** – OE Surplus
        - **S** – Surplus
        - **R** – Rebuilt
    - **Aftermarket**
        - **A** – Aftermarket
        - **P** – CAPA Aftermarket
        - **1** – CAPA Tier 1
        - **F** – NSF Aftermarket
        - **B** – Branded Aftermarket
        - **K** – Used Aftermarket
    - **Remanufactured**
        - **M** – Remanufactured
    - **OEM**
        - **D** – New OEM Discount
        - **N** – New OEM
    - **Core/Other**
        - **C** – Core
        - **Z** – Unknown
- **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 for the last 365 days (available for Car-Part.com Demand Data subscribers only)
- **CP Regional** – Car-Part.com regional request activity for the last 365 days (available for Car-Part.com Demand Data subscribers only)
- **CP Global** – Car-Part.com global request activity for the last 365 days (available for Car-Part.com Demand Data subscribers only)
- **Requests** – 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.
    - – There are part images associated with this part.
    - – There are AUT images associated with this part.
    - – 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.
- **Incomplete** – For assembly parts, indicates if the assembly is incomplete:
    - **N** – No, the assembly is *not* incomplete (i.e., it is complete)
    - **Y** – Yes, the assembly *is* incomplete (i.e., it is not complete).
    - **S** – The system (Checkmate) has recognized an inconsistency with the part and it needs to be reviewed. Review these parts using the INCOMPLETE View.
- **Part Type** – Type of part and grading method for this part:
    - **Mechanical**
    - **Body**
    - **Sheet Metal Assembly**
    - **Wheels**
    - Subjective parts:
        - **Glass**
        - **Lights**
        - **Mirrors**
        - **Cosmetic**
        - **Seats**
        - **Airbags**
        - **Other**
- **Prv Prt Grd** – Previous part grade. The grade of the part before Checkmate ungraded it (because of inconsistency in the part information).

- **Grd Reason Chng** – Grade reason change. Why the part was regraded (if applicable).
    - **Year Rollover** – Mechanical parts that were regraded, because the calendar year has changed. (The standards for mechanical parts are partially based on the mileage “per year.”)
    - **System Update** – Parts that were regraded when you updated your Checkmate software or interchange.
    - **Yard Settings Changed** – Parts that were regraded as a result of changes to your yard settings.
    - **User Part Edit** – Parts that were regraded when someone manually changed the description, ARA damage code, or condition.
    - **User Vehicle Mileage Edits** – Mechanical parts that were regraded when someone manually changed the mileage of the AUT record associated with the parts.
- **PM Prt Grd** – Grade of the part determined for this part in Partmate (if applicable).
- **CP Prt Grd** – Grade of the part determined for this part by Car-Part.
- **Changed by** – If the part was regraded by a user at your business (i.e., when the **Grade Reason Change** is **User Part Edit** or **User Vehicle Mileage Edit**), shows the user’s name.
- **Graded Date/Time** – Date and time the part was last graded.
- **CM Dwn Grd** – If part was downgraded or ungraded in Checkmate, indicates the type of keywords in the part description.
    - **Downgraded (D)** – Parts that have been downgraded, but not ungraded, due to a keyword.
    - **Ungraded (U)** – Parts that have been ungraded.
    - **Zero Damage Objection (O)** – Parts that have been ungraded, because the ARA damage code for the part indicates no damage, but a keyword indicates damage.
    - **Incomplete (I)** – Assemblies that have been ungraded, because a keyword indicated they were incomplete.
    - **Kind Aftermarket (KA)** – Parts that have been ungraded, because a keyword indicates they are aftermarket parts, but are inventoried with different a part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “AFTMKT” in its description.
    - **Kind Reman (KM)** - Parts that have been ungraded, because a keyword indicates they are remanufactured parts, but are inventoried with a different part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “REMAN” in its description.
    - **New OEM (KN)** - Parts that have been ungraded, because a keyword indicates they are new OEM parts, but are inventoried with a different part kind. For example, a part that is inventoried with the kind **U – Used OEM**, but has the keyword “NEW” in its description.
    - **New Discount OEM (KD)** – Parts that have been ungraded, because a keyword indicates they are new OEM parts, but are inventoried with a different part kind. For example, a part that is inventoried with the kind U – Used OEM, but has the keyword “OEM DISCOUNT” in its description.
- **PM Dwn Grd Ind** – If the part was downgraded or ungraded in Partmate, indicates the type of keyword(s) in the part description that caused it (see the description of the **CM Dwn Grd** options for more information about keyword types).
- **CP Dwn Grd Ind** – If the part was downgraded or ungraded by Car-Part, indicates the type of keyword(s) in the part description that caused it (see the description of the **CM Dwn Grd** options for more information about keyword types).

- **Conv Part Grade** – If this part previously existed in another IMS and was sent to Checkmate as part of an IMS conversion, displays the grade of the part in the previous IMS.
- **MyList** – Your business's My List price for this part (only used for parts with a Kind that is non-used: either aftermarket, remanufactured, or new OEM).
- **Keywords** – Words from the part description in Checkmate that caused the part to be downgraded or ungraded.
- **CM Int Grd** – Checkmate internal part grade. This information is used by the software and cannot be edited. It is not visible to customers in online listings but it does help determine sort orders of search results in online search results.
- **$martList** – If the part was inventoried in Partmate and has one or more $martList recommendations, displays the $martList result(s) of the part.
- **PMIncomplete** – How the **Incomplete Assembly** field was set for this part in Partmate (if applicable).
    - **N** – No, the assembly is *not* incomplete (i.e., it is complete)
    - **Y** – Yes, the assembly *is* incomplete (i.e., it is not complete).
    - **S** – The system (Checkmate) has recognized an inconsistency with the part and it needs to be reviewed. Review these parts using the INCOMPLETE View.
- **PMKind** – How the part **Kind** field was set for this part in Partmate (if applicable).
- Sales and inventory comparison columns (refer to the **Sales and Inventory Comparison Columns** section for more information):
    - **Local2Sales** – Local to Sales: Compares the number of local requests on Car-Part.com marketplaces with your number of sales for that part.
    - **Reg2Sales** – Regional to Sales: Compares the number of regional requests on Car-Part.com marketplaces with your number of sales for that part.
    - **Global2Sales** – Global to Sales: Compares the number of requests for a part made on Car-Part.com marketplaces with your number of sales for that part.
    - **Req2Sales** – Requests to Sales: Compares your business's number of requests to your number of sales for that part.
    - **Local2Invent** – Local to Inventory: Compares the number of local requests on Car-Part.com marketplaces with your QOH of that part.
    - **Reg2Invent** – Regional to Inventory: Compares the number of regional requests on Car-Part.com marketplaces requests with your QOH of that part.
    - **Global2Invent** – Global to Inventory: Compares the number of requests made on Car-Part.com marketplaces with your QOH of that part.
    - **Req2Invent** – Requests to Inventory: Compares your business's number of requests with your QOH of that part.
- **AvgDaysQOH** – Average number of days in stock for the parts you currently have on hand.
- **AvgDaysSold** – Average number of days your sold parts were in stock before they sold.
- **PM Keywords** – Words from the part description in Partmate that caused the part to be downgraded or ungraded.
- **CP Keywords** – This information is typically only used by your support tech for troubleshooting. This displays the keywords from the part description found when Car-Part.com graded the part.
- **CP Kind** – This information is typically only used by your support tech for troubleshooting. This displays the part kind from Car-Part.com.

- **CP Incomplete** – This information is typically only used by your support tech for troubleshooting. This displays the whether this part is an incomplete assembly, as determined by Car-Part.com.
- **Dismantle to** – Where you intend the part to go (**Warehouse**, **Yard**, or **Unbolted**) when it has been dismantled. This prints on the dismantling instructions report in Partmate and in Checkmate.
- **Disc Part** – Whether or not the part has a discontinued part code. If **Y**, refer to the **Disc Part Note** column for more information.
- **Disc Part Note** – If this part has a discontinued part code, displays information about updated part codes that may be appropriate for the part.
- **Disc Model** – Whether or not the part has a discontinued model. If **Y**, refer to the **Disc Model Note** column for more information.
- **Disc Model Note** – If this part has a discontinued model, displays information about updated models that may be appropriate for the part.

Sales and Inventory Comparison Columns

In Inventory Pro, there are several columns that show you request data compared to your sales and your inventory. These columns help you compare:

- Your sales vs your business requests, for various parts
- Your sales vs requests for that part on Car-Part.com marketplaces
- Your quantity on hand vs requests for that part at your business
- Your quantity on hand vs requests for that part on Car-Part.com marketplaces

You can use this information to identify parts that may need prices changed, and more.
The data in these columns is based on the part's interchange number; these columns will be blank on non-interchange parts.

Request	Sales	Req2Sales	Local2Sales	Reg2Sales	Global2Sales	Req2Invent	Local2Invent	Reg2Invent	Global2Invent
0	0	0	18	168	512	0	18	168	512
5	4	1	13	115	384	5	52	459	1537
0	0	0	5	104	331	0	5	104	331

How the Ratio/Comparison is Calculated

Each of the columns is a ratio. For example: a certain interchange number had 52 local requests on Car-Part.com for an interchange number, and 4 sales at your business. The **Local2Sales** column (which compares those requests to those sales) would display **13** (52 ÷ 4 = 13).

Notes:

- The actual numbers may not be useful to you. These ratios are calculated by comparing Request Data to Sales Data, and those data sources may have different date ranges* depending on your Checkamte configuration.
- Use these columns to sort and compare. While the actual number may not be relevant, these columns *are* useful for sorting data, spotting patterns, and comparing sales performance.
- In general, a lower number is better in these columns.

* Request data (from both your business and Car-Part.com) includes the past year (starting 365 days before the current date). Sales data date range depends on your **Days of sales history to display** setting in Checkmate Retro (Checkmate Full: **6,10,4** or Checkmate Classic: **S3,4** or Checkmate Junior: contact support.)

Column Definitions

The sales and inventory comparison columns are listed below*.

Note: Local and Regional areas is custom-set for your business. When Checkmate was installed for your business, a support tech worked with your team to decide what area best suits your business as definition for your local and your regional area (e.g. a 20 mile radius). If you are unsure whether your current local and regional definitions are right for your business, please contact your Checkmate support tech.

Sales columns

- **Local2Sales** – Local to Sales: Compares the number of local requests on Car-Part.com marketplaces with your number of sales for that part.
- **Reg2Sales** – Regional to Sales: Compares the number of regional requests on Car-Part.com marketplaces with your number of sales for that part.
- **Global2Sales** – Global to Sales: Compares the number of requests for a part made on Car-Part.com marketplaces with your number of sales for that part.
- **Req2Sales** – Requests to Sales: Compares your business's number of requests to your number of sales for that part.

Inventory columns

- **Local2Invent** – Local to Inventory: Compares the number of local requests on Car-Part.com marketplaces with your QOH of that part.
- **Reg2Invent** – Regional to Inventory: Compares the number of regional requests on Car-Part.com marketplaces requests with your QOH of that part.
- **Global2Invent** – Global to Inventory: Compares the number of requests made on Car-Part.com marketplaces with your QOH of that part.
- **Req2Invent** – Requests to Inventory: Compares your business's number of requests with your QOH of that part.

* The **Req2Sales** and **Req2Invent** columns are available for anyone using Checkmate Inventory Pro. The other 6 columns are available only to Car-Part.com Demand Data subscribers.

Appendix B: Part Grading

For each part in your inventory, Checkmate examines the part information and then calculates a grade for the part according to the Automotive Recyclers Association's Part Grading Guidelines.

For more information about these guidelines, refer to the ARA website: https://www.a-r-a.org/resources.html

Part Type with Grading Method

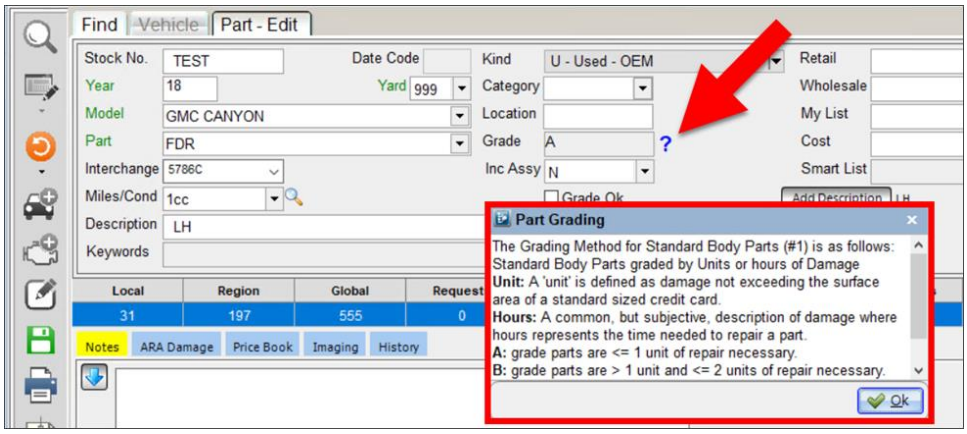
The grading method used for a part depends on what type of part it is:

- **Mechanical Part**
- **Body Part**
- **Sheet Metal Assy** (Assembly)
- **Wheels**
- Subjective part: **Glass**, **Lights**, **Cosmetic**, **Mirrors**, **Seats**, **Airbag**, **Misc - Other**

Part	Part Type
CAL-R	Mechanical Part
LCF-L	Mechanical Part
BAS-L	Mechanical Part
FST	Seats
FTK	Body Part
FPM	Mechanical Part
LCF-R	Mechanical Part
FST	Seats
RST	Seats
DPN	Cosmetic
BMT	Mechanical Part
IWK	Mechanical Part

On the **Find** tab (search results), a part information column called **Part Type** displays the type of part and the grading method being applied to that part.

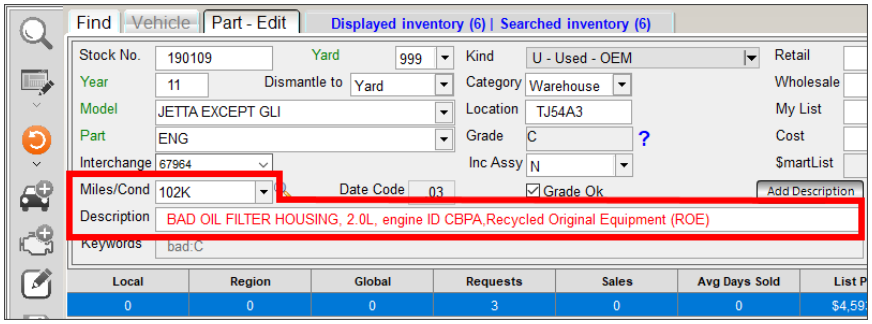
On the **Part** tab (adding/editing a part), you can click the blue question mark (?) icon next to the **Grade** field to learn more about how that specific part is graded.



Grading Mechanical Parts

To grade mechanical parts, when adding or editing:

- In the **Miles/Cond** field, enter the part's mileage
- In the **Description**, describe the condition of the part well and accurately, especially anything about the part condition that is not reflected in the mileage.

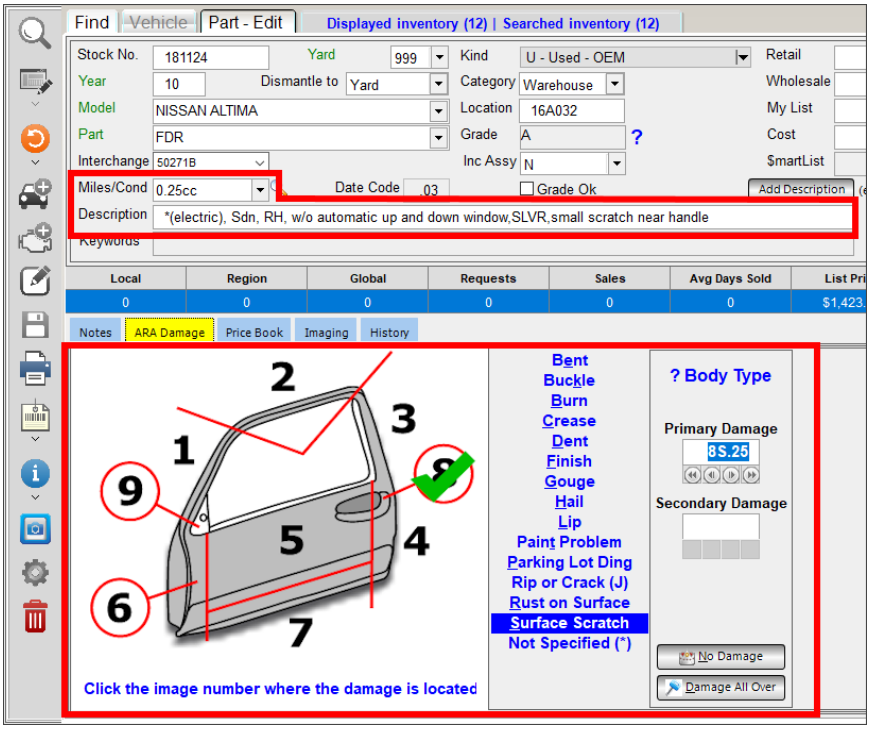


The part will be graded when you click the save button.

Grading Body Parts, Sheet Metal Assemblies, and Wheels

To grade body parts, sheet metal assemblies, and wheels, when adding or editing:

- On the **ARA Damage** tab, indicate the part's damage, if any. (The **Miles/Cond** field updates accordingly.)
    - If the part is undamaged, click the **No Damage** button.
    - If the part is damaged, add a damage code in the **Primary Damage** field (and if necessary, the **Secondary Damage** field). Refer to the **Part – ARA Damage Tab** section of this guide for more information.
- In the **Description**, describe the condition of the part well and accurately.



The part will be graded when you click the save button.

Grading Subjective Parts (Glass, Lights, Cosmetic, Mirrors, Seats, Airbags, and Misc.)

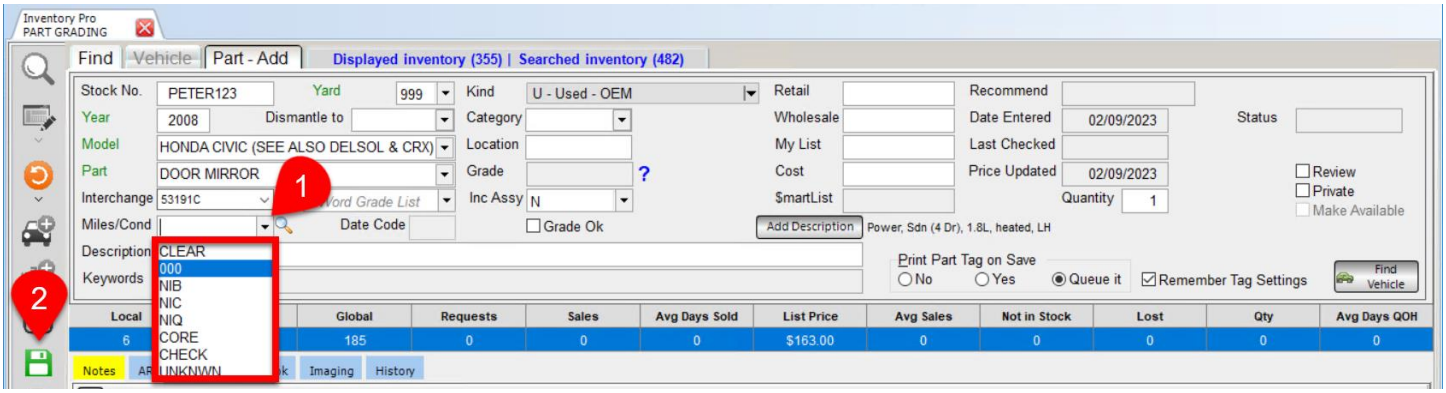
"Subjective" part types are graded mainly based on the **Miles/Cond** field, not by damage or mileage.

Subjective parts include **Glass**, **Lights**, **Cosmetic** parts, **Mirrors**, **Seats**, **Airbags**, and **Misc – Other** parts.

To grade Subjective parts in Checkmate, start on the **Part-Edit** screen:

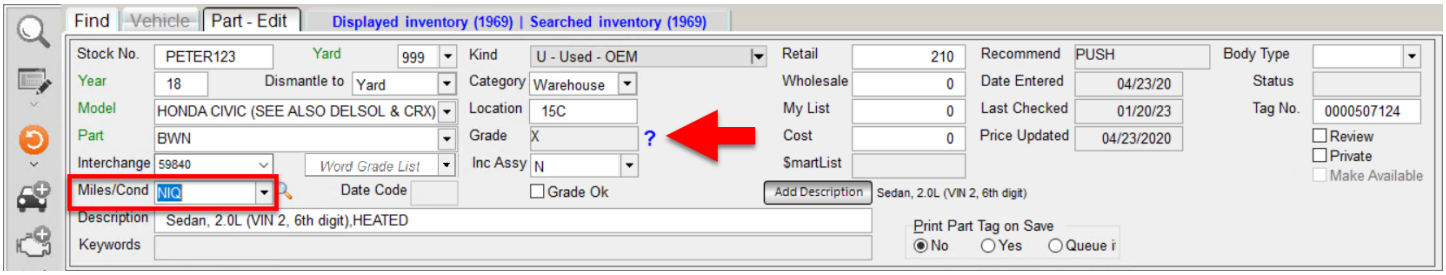
If the Subjective part is undamaged:

1. Click the **Miles/Cond** drop-down and select **000**. (You can also manually enter **000** or **0cc** in the **Miles/Cond** field.)
2. Click the save button .

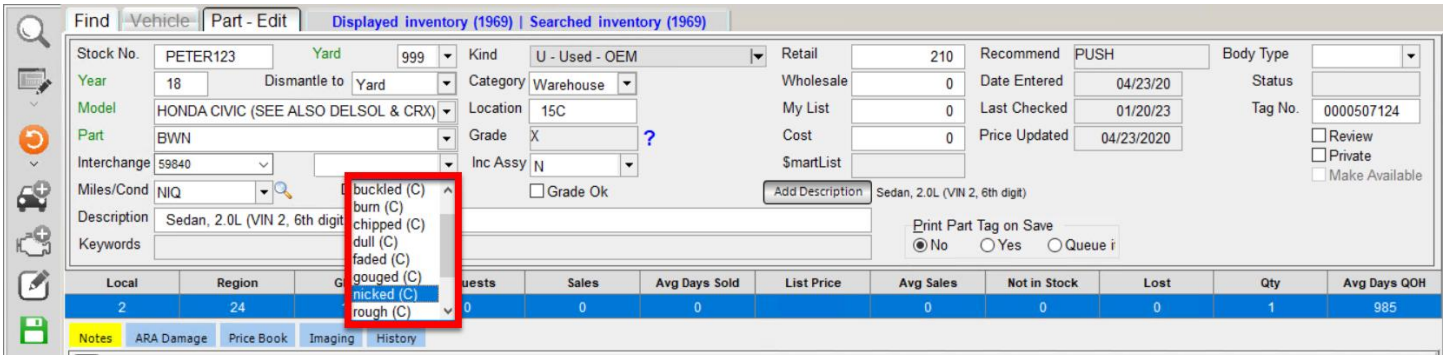


If the Subjective part *is* damaged:

1. Click the **Miles/Cond** drop-down, and select either **NIB** (for a B grade) or **NIQ** (for a C grade). If you're unsure how the Part Type is graded, then click the blue question mark icon to open a window with grading info.



2. In the **Description** field, write a detailed description that includes the damage. You can click the **Word Grade List** drop-down for a list of words that describe damage, (and show you the grade associated with that word). When you select a word, it is added to the part's **Description**.



3. Add an ARA Damage code. This code will not affect the part's grade, but presenting this additional detail enhances the marketability of this part in the Car-Part.com marketplace.
4. Click the save button.

A+ Grade for Undamaged Body Parts

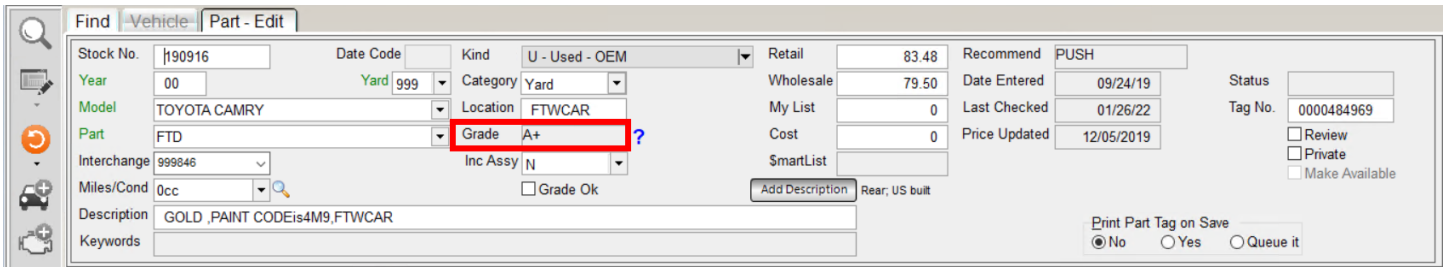
Undamaged body parts and sheet metal assemblies can be graded as **A+**.*

This is a grade only relevant to the Checkmate product suite and to Car-Part.com marketplaces (it is not part of standard ARA part grading).

The A+ grade distinguishes between parts with no damage (A+) and parts with minor damage (A).

To be graded as A+, a part must meet the following requirements:

- Must be a body part or a sheet metal assembly
- **Condition** set to 000, 0cc, or 0hr
- No ARA damage code
- No keywords that indicate damage
- Must be complete (**Inc. Assy** set to **N**)



* When the part grading improvements are fully implemented on Car-Part.com marketplaces, marketplace shoppers will see parts with no damage graded as A+.

Downgrading with NIB/NIQ in the Condition Field

Parts can be manually downgraded with **NIB** or **NIQ**[*]. Enter these terms in the **Condition** field to manually lower any part's grade. You might do this because the existing damage information calculates a higher grade than you want to advertise, or because you want to manually assign a grade to Subjective parts.

NIB and **NIQ** are terms that are part of the ARA Part Grading Guidelines, and can be added to your inventory information on any part. These are the definitions from ARA's Standards and Codes:

- *NIB: Negative information term used to down grade an “A” grade part to a “B” grade part.*
- *NIQ: Negative information terms used to down grade an “A” or “B” grade part to a “C” grade part.*

Functionally, NIC is the same as NIQ. They both give parts a C grade. But we recommend that you use NIQ because it's less ambiguous (and less likely to be confused with words like "nick" or "nice").

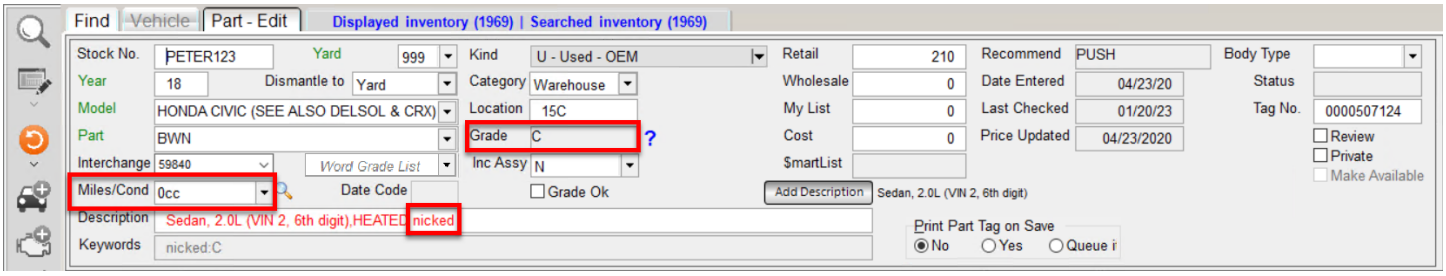
These terms can make a part grade lower, but not higher. (So, if you have a part with damage information that would lead to a C grade, you can't bring it up to a B with NIB.) Also, you can't use NIB to grade an ungraded body or mechanical part, but you can use it to grade a subjective part, like a headlight.

[*] In order for NIB and NIQ to work as described, your system must be configured correctly. If you have questions about your configuration, contact your support tech.

Automatic Inventory Regrading Based on Keywords

Checkmate will automatically regrade parts based on keywords in the **Description**. If a part is regraded based on a keyword in its **Description**, that means Checkmate detected an inconsistency between the keyword and the value in the part's **Miles/Cond** field, or other part information.

The **Descriptions** for parts regraded this way will display in red, indicating that a keyword in that **Description** is affecting the part's grade.



You can find parts regraded this way by using the **Downgraded by a Keyword** audit (see the **DOWNGRADED BY A KEYWORD** section of this guide for more info).

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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