

Business Name: _____ Yard Number: _____

Is Your Business Optimized?

Are you getting the most out of your Car-Part products? Are the members of your team and your software set up optimally for *your* business? There are *many* customizations and setup options available that you may not be aware of, that help you streamline your processes.



How to use this worksheet:

1. Check the boxes below for each item you want to either improve or get more information about.
2. To learn the next step, send an email to: BeckyA@Car-Part.com

Are your inventory, sales, and production processes streamlined?

- Do you have warehouse (rack/shelf) and yard locations set up?
- Do you have Location/Category mapping set up?
- Would you like to set up a Stock Number sequence in Checkmate?
- Do you have universal part tags set up?
- Do your salespeople know if your business is brokering/tiering or duplicating and how these parts display?
- Are your salespeople trained to search by VIN? Checkmate's SmartVin technology eliminates non-fitting interchange choices when you search by VIN, instead of by year/make/model.
- Do you have Car-Part Messaging's preset message buttons configured for messages you send frequently?
- Do you need help customizing how search results look in Checkmate Sales Pro? Would you like help setting up a custom View in Inventory Pro?
- Do you have favorites configured in Trading Partners? You can designate favorite partners that will display first in your Trading Partners searches.
- Do you have a business logo you'd like to print at the top of your work orders and invoices? Would you like our design department to create a header logo for you?
- Do you still use an Okidata printer? Checkmate can print to laser printers. A Checkmate support tech can assist you with setup.
- Do you use quote notes and work order/invoice notes frequently? If so, do you have "Quick Notes" set up? Then you can quickly add a preset note from a drop-down box.
- Are you set up to email out of Checkmate Workstation? You can email quotes, invoices, pictures, statements, and more!
- Did you know Checkmate can be set to "talk" to UPS World Ship? Then you can put an invoice number in UPS World Ship and the customer's address will populate.
- Do you have Order Trakker set up for maximum automation? You can:
 - Map part locations to Order Trakker tabs.
 - Set up part codes to trigger dismantling in Order Trakker.
 - Map part categories to Order Trakker tabs.
- Did you know that inventorying assembly parts can increase your part visibility and sales? Are you interested in setting up and inventorying assemblies?
- Do you have extended warranties set up?
- Is your system configured for Core charges?
- Are the Partmate parts lists you use to inventory vehicles customized for your business?

- In Partmate, did you know you can edit the fields on the vehicle Options tab to fit your business? This helps speed up the inventory process tremendously.
- Have you configured \$martList settings in Partmate?
- Are your Photomate devices configured to use cell data? If so, you can work in Photomate anywhere: you could update your Price Book on the beach!

Do you know these easy troubleshooting items?

- Do you know how to reconnect your image folder?
- Do you know how to troubleshoot Photomate not connecting to Checkmate?

Is your inventory information detailed, accurate, and available?

- Do you assign interchange to resolution parts (*U*) after every interchange update?
- Are you regularly resolving inconsistencies in your part grading?
- When was the last time you updated your Car Part Pro configuration?
- Do you have a dedicated area with good lighting and a white backdrop set up to take part photos?
- Do your inventory team members know best practices for taking good part photos?
- Do you keep an iCPM account that's enabled with RTP logged in? This is required in order for Car Part Pro customers to verify your parts are available. Your web tech can help you identify which of your iCPM accounts are configured for RTP and should be left logged in.

Are all your team members set up correctly?

- Do you need Checkmate login accounts created for new employees?
- Do you have accounting or inventory employees you don't want to log sales requests in Checkmate?
- Does everyone on your team know all of your F-Keys? (Buy, Price, Vendor, Wheel Images, CrashLink)
- Do you need any iCPM accounts? Do you need to update or close any iCPM accounts used by former employees?
- Do you want a private, internal iCPM room set up for your business?
- Is everyone on your team answering their iCPM messages?
- Do you have employees that are often away from a computer? If so, you may not want these employees to show on Live Chat on Car-Part.com.
- Do you want to work from home, or do you have any employees that work from home? If so, a support tech can configure your/their system accordingly.

Are you protecting your business's data and equipment and getting the most out of it?

- Are you currently backing up your Checkmate data and part images?
- Are you restarting Checkmate Workstation daily for optimal performance? (For most computers, you can run a restart with: Start Menu > Power > Restart.)
- Are you running an End of Day/Week/Month report?
- Do you have Microsoft Excel so you can access Checkmate's most powerful reports?
- Do you need help with setting up an NMVITIS export out of Checkmate?
- Did you know Car-Part hosts Roundtable groups for recyclers that want to use data to grow their business?

Are you optimizing your eBay listings?

- Do you know how to use Checkmate's Listing Manager for eBay to re-list stagnant listings so they look like new listings?
- Do your listings have text in all CAPS? Per eBay, this will lower your listing rankings!

- ❑ Did you know that when you select interchange on a resolution (*U*) part, this removes the part from eBay and you need to relist it? Anytime you make a change to a part's interchange, the part is removed from eBay. You must relist the part.
- ❑ In Checkmate's Listing Manager for eBay, are you filling out Item Specifics so your listings will move higher in eBay search results?
- ❑ Is your eBay Listing Template set up to automatically create listing titles with part information given in the order eBay favors? Year, Model, Part Type, Side, Description
- ❑ Do you know how to use the eBay Active Listings Only check box to easily remove items from eBay?
- ❑ Do you use the "relist to eBay" tool inside of CM workstation to easily relist eBay parts that were returned?
- ❑ Do you use Checkmate Inventory Pro's eBay features? You can add Item Specifics to parts before sending them from Inventory Pro to Checkmate's eBay tab. You can also use Inventory Pro to update prices and images on your active listings.