Checkmate 2024R2 New Features

In the latest release of Checkmate, we're introducing new features and making some changes to existing features:

- Item Specifics can now be added before listing parts on eBay, to improve the searchability of your parts. You can add any Item Specifics from Checkmate, but we'll also point you toward the most important ones.
- In Sales Pro, Work Orders/Invoices are better integrated with Order Trakker.
- In Order Trakker, you can easily add a work order to Order Trakker (if it wasn't sent automatically)
- In Dashboard, a new gadget identifies sales that aren't in Order Trakker.
- AUT Records now have room for more characters.
- New Excel reports help you balance your cash drawer and monitor staffing as it relates to the number of vehicles purchased.
- If you use Checkmate Retro, you may now need to switch to Checkmate Sales Pro to edit some work orders.

eBay: Add Item Specifics to eBay Listings

Before you send listings to eBay, you have the opportunity to add eBay **Item Specifics** (e.g., Engine Size, Number of Cylinders) that help the listing appear in more eBay search results. While you're adding **Item Specifics**, you will see information that shows you which **Item Specifics** are most beneficial to add to the listing.

Before sending a part to eBay, follow these steps to add **Item Specifics**:

1. After you have added parts to the **Inventory to send to eBay** section of the screen, click the **Item Specifics** button on a part line to work with that part.

2. The **Item Specifics** window opens for this part. This window includes:

    a. Year, make, model, and interchange number for the part

    b. Part **Description**

    c. **IC Description** – interchange description

    d. **Search Count** – Displays the number of times eBay shoppers searched by this item specific in the past 30 days (for parts in the same eBay Category as the part you're working on).

    e. **Value** – Displays current selection for the Item Specific. When possible, Checkmate automatically makes this selection for you on REQUIRED Item Specifics, but you can change it if you wish (for example, if you want to improve the **eBay Title**).

    f. **Listing Information** – Displays the name of the Item Specific, and notes whether the Item Specific is **REQUIRED** (must be included for the listing to go to eBay), **RECOMMENDED** (eBay data suggests including it will improve the listing's searchability), or **OPTIONAL** (including it could improve the listing's searchability, but eBay data suggests it's not especially beneficial).

Item Specifics - eBay Category - Engines (33615)

12 HONDA CIVIC (SEE ALSO DELSOL CRX) ENG-80068A

Description: RAN, 1.8L, VIN 2 (6th digit, gasoline, Sdn), Federal emissions, Recycled Original Equipment (ROE)

IC Description: 1.8L, VIN 2 (6th digit, gasoline, Sdn), Federal emissions

Listing Information	Search Count	Value
eBay Title (REQUIRED)		Engine Assembly HONDA CIVIC 12 13 14 15
eBay Condition Description (RECOMMENDED)		< Set Value >
Item Specifics (Sorted by eBay)		
Brand (REQUIRED)	572598	HONDA
Number of Cylinders (RECOMMENDED)	230746	< Set Value >
Engine Size (RECOMMENDED)	116348	< Set Value >
Fuel Type (RECOMMENDED)	21294	< Set Value >
Type (RECOMMENDED)	9194	< Set Value >
Block Type (RECOMMENDED)	8146	< Set Value >
Manufacturer Part Number (RECOMMENDED)	0	< Set Value >
OE/OEM Part Number (RECOMMENDED)	0	< Set Value >
Number of Valves (OPTIONAL)	4660	< Set Value >
Country/Region of Manufacture (OPTIONAL)	582	< Set Value >
Items Included (OPTIONAL)	468	< Set Value >
Mileage (OPTIONAL)	370	< Set Value >
Vintage Part (OPTIONAL)	241	< Set Value >
Universal Fitment (OPTIONAL)	180	< Set Value >
Performance Part (OPTIONAL)	175	< Set Value >
Manufacturer Warranty (OPTIONAL)	79	< Set Value >
Interchange Part Number (OPTIONAL)	0	< Set Value >
Superseded Part Number (OPTIONAL)	0	< Set Value >
California Prop 65 Warning (OPTIONAL)	0	< Set Value >

Clear Values   Close

3. To select an Item Specific, click the appropriate button in the **Value** column.

4. A new window opens. Enter the value for the chosen Item Specific[*]. You can:

   a. Check the box(es) to select from the **eBay Supplied** options (if available).

   b. **Enter Your Own Text** in the text box. As you type, the red number shows you how many characters you have left. When you're finished typing, click the green plus sign button ⊕ to add the text.

   c. Click the **Description** button to copy the part's **Description** from your inventory data into the **Enter Your Own Text** field. Then click the green plus sign button ⊕ to add the text.

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[*] If you need to review the interchange application information, click the **APP** button**.**

⚠️ **Tip:** For a faster workflow, you can right-click an **eBay Supplied** checkbox to select the value *and* immediately move on to the next Item Specific (If you use this right-click method, skip to **Step 6**.)

5. After you entered/selected the Item Specific, it moves and displays in the bottom of the window in yellow.

   Click the **Next** button to proceed to the next Item Specific (the button will give you a preview of what the next Item Specific is, and whether it's **REQUIRED**, **RECOMMENDED**, OR **OPTIONAL**).

6. If you wish to remove an Item Specific, click the red **X** (to remove 1) or the **Remove All** button.

7. Repeat steps 4-6 until you've added values for every Item Specific that you want to, then click **Save**.

8. The window closes, and the Item Specific(s) you selected now show in the **Value** column.

Item Specifics - eBay Category - Engines (33615)		
12 HONDA CIVIC (SEE ALSO DELSOL _CRX) ENG-80068A		
Description: RAN, 1.8L, VIN 2 (6th digit, gasoline, Sdn), Federal emissions,FTWCAR Recycled Original Equipment (ROE)		
IC Description: 1.8L, VIN 2 (6th digit, gasoline, Sdn), Federal emissions		

Listing Information	Search Count	Value
eBay Title (REQUIRED)		HONDA CIVIC ENGINE ASSEMBLY. Fits 2012 through
eBay Condition Description (RECOMMENDED)		This part is used, has been tested, and is in good w...
Item Specifics (Sorted by eBay)		
Brand (REQUIRED)	572598	HONDA
Number of Cylinders (RECOMMENDED)	230746	4
Engine Size (RECOMMENDED)	116348	1.4 L
Fuel Type (RECOMMENDED)	21294	Gasoline
Type (RECOMMENDED)	9194	Complete Assembly
Block Type (RECOMMENDED)	8146	Straight
Manufacturer Part Number (RECOMMENDED)	0	123456
OE/OEM Part Number (RECOMMENDED)	0	123456
Number of Valves (OPTIONAL)	4660	< Set Value >
Country/Region of Manufacture (OPTIONAL)	582	< Set Value >
Items Included (OPTIONAL)	468	< Set Value >
Mileage (OPTIONAL)	370	< Set Value >
Vintage Part (OPTIONAL)	241	< Set Value >
Universal Fitment (OPTIONAL)	180	< Set Value >
Performance Part (OPTIONAL)	175	< Set Value >
Manufacturer Warranty (OPTIONAL)	79	< Set Value >
Interchange Part Number (OPTIONAL)	0	< Set Value >
Superseded Part Number (OPTIONAL)	0	< Set Value >
California Prop 65 Warning (OPTIONAL)	0	< Set Value >

❌ Clear Values   ✅ Close

9. Keep track of your process with the Lightning Meter. (Learn more in the **Track Progress with the Lightning Meter** section of this guide, below.)

10. When you're finished adding Item Specifics for the listing, click **Close** to exit the **Item Specifics** window.

Performance Part (OPTIONAL)	175	< Set Value >
Manufacturer Warranty (OPTIONAL)	79	< Set Value >
Interchange Part Number (OPTIONAL)	0	< Set Value >
Superseded Part Number (OPTIONAL)	0	< Set Value >
California Prop 65 Warning (OPTIONAL)	0	< Set Value >

❌ Clear Values   ✅ Close
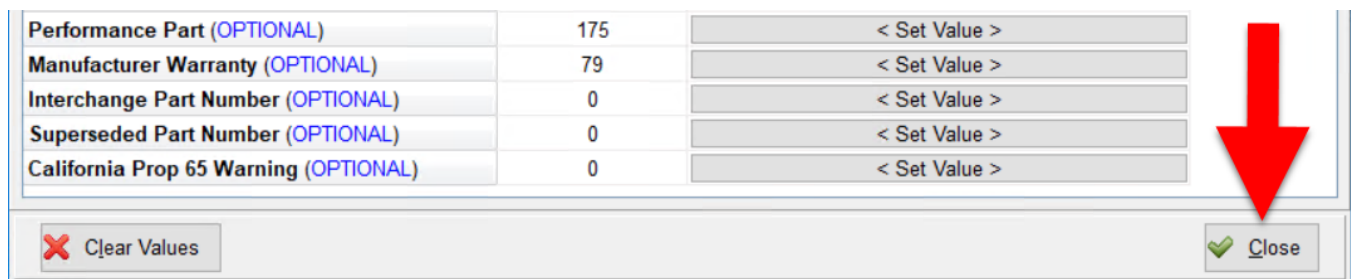
Tracking Progress with the Lightning Meter

The lightning meter in the **Item Specifics** window shows you how likely the listing will appear in eBay searches, based on the Item Specifics you have set for the listing.

(Red)	The part is missing **REQUIRED** Item Specifics. It cannot be listed to eBay.
(Yellow)	The part has all **REQUIRED** Item Specifics, but it does not have all **RECOMMENDED** Item Specifics. The part can be listed to eBay, but the listing is not optimized for the eBay search (and may not have as much visibility as it could).
(Blue)	(Optimal) the part has all **REQUIRED** and **RECOMMENDED** Item Specifics. A blue lightning meter means the part is highly searchable on eBay.

Relisting Parts with Item Specifics

When you've added Item Specifics to a part in Checkmate, and later relist the part to eBay using Checkmate, all Item Specifics will automatically be included in the new listing. There is no need to repeat the process of adding the Item Specifics in Checkmate.

VIN Automatically Included as an Item Specific

With this release, when you send a part to eBay, the VIN of the vehicle the part came from is now automatically included on the listing as an Item Specific. (Unless the part is not associated with an AUT record. Aftermarket parts, for example, would not include a VIN.)

Because the VIN is added automatically, you will not see "VIN" as an option when adding Item Specifics to a part in Checkmate (for more information, see the eBay: Add Item Specifics to eBay Listings section of this guide).

Sales Pro: Improved Work Order/Invoice Integration with Order Trakker

Options When Printing and Promoting Work Orders

This update to Checkmate provides you with more and clearer options, when you are printing a Work order, or promoting it to an invoice. You can easily choose whether or not to:

- send the work order/invoice to Order Trakker
- print the work order/invoice
- email the work order/invoice
- send the work order/invoice to EZ Suite

To choose from these options:

1. On the **Work Order / Invoice** tab, click the **>** arrow next to either the **Print WO** or **Promote INV** button.

2. A list of options appears. Click the action you would like to take.

Print WO Options

For **Print WO** [Print WO ›], these are your options, and their functions:

Menu Option	Function
Send OT	Sends WO to your Order Trakker Queue
Print WO – OT	Prints WO and sends WO to your Order Trakker Queue
Email WO – OT	Emails WO and sends WO to your Order Trakker Queue
Print/Email WO – OT	Prints and emails WO, and sends WO to your Order Trakker Queue
Print Std WO – OT†	Prints standard WO and sends WO to your Order Trakker Queue
Print WO	Prints WO (does *not* send WO to your Order Trakker Queue)
Email WO	Emails WO (does *not* send WO to your Order Trakker Queue)
View WO	Opens a preview of WO in a new window
Print/Email WO	Prints and emails WO (does *not* send WO to your Order Trakker Queue)
Print Std WO*	Prints standard WO (does *not* send WO to your Order Trakker Queue)
Send EZ†	Sends WO to EZ Suite (does *not* send WO to your Order Trakker Queue)
Send OT/EZ‡	Sends WO to both Order Trakker and EZ Suite
Print WO – OT/EZ‡	Prints WO, and sends WO to both Order Trakker and EZ Suite
Email WO – OT/EZ‡	Emails WO, and sends WO to both Order Trakker and EZ Suite
Print/Email WO – OT/EZ‡	Prints and emails WO, and sends WO to both Order Trakker and EZ Suite
Print Std WO – OT/EZ*‡	Prints and emails standard WO, and sends WO to both Order Trakker and EZ Suite

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* These options only display if you have production work orders turned on. For more information, see the Checkmate Sales Pro User Guide.

† These options will not display if you do not use the Order Trakker/ EZ Suite Integration.

Promote INV Options

For **Promote INV** [Promote INV >], these are your options and their functions:

Menu Option	Function
Send OT	Sends INV to your Order Trakker Queue
Print INV – OT	Prints INV, and sends INV to your Order Trakker Queue
Email INV – OT	Emails INV, and sends INV to your Order Trakker Queue
Print/Email INV – OT	Prints and emails INV, and sends INV to your Order Trakker Queue
Print WO/INV – OT	Prints both WO and invoice, and sends INV to your Order Trakker Queue
Print INV	Prints INV (does *not* send INV to your Order Trakker Queue)
Email INV	Emails INV (does *not* send INV to your Order Trakker Queue)
Print/Email INV	Prints and emails INV (does *not* send INV to your Order Trakker Queue)
Print WO/INV	Prints both WO and INV (does *not* send INV to your Order Trakker Queue)
Send EZ[*]	Sends INV to EZ Suite (does *not* send INV to your Order Trakker Queue)
Send INV – OT/EZ§	Sends INV to both Order Trakker and EZ Suite
Print INV – OT/EZ§	Prints INV, and sends INV to both Order Trakker and EZ Suite
Email INV – OT/EZ§	Emails INV, and sends INV to both Order Trakker and EZ Suite
Print/Email INV – OT/EZ§	Prints and emails INV, and sends INV to both Order Trakker and EZ Suite
Print WO/INV – OT/EZ§	Prints both WO and INV, and sends INV to both Order Trakker and EZ Suite

Changing Your Default for the Print WO and Promote INV Buttons

By default:

- Your **Print WO** button is set to **Print WO – OT**

- Your **Promote INV** button is set to **Promote INV - OT**
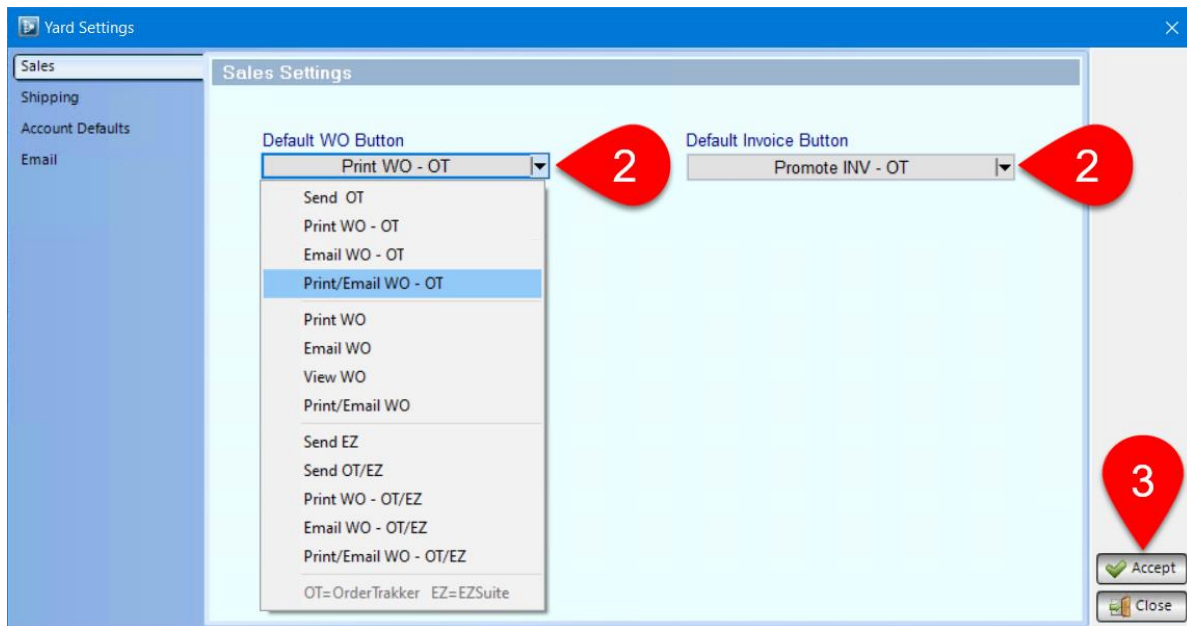
[Print WO - OT >] [Promote INV - OT >]

But, you can change these defaults at any time. To do so:

1. Go to *Settings > Yard Settings*.

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[*] These options will not display if you do not use the Order Trakker/ EZ Suite Integration.

2. The **Yard Settings** window opens, displaying the **Sales** tab. On this tab, use the drop-downs to select your preferred defaults for the buttons.

3. Click **Accept** to save your changes and close this window. If you have any Sales Pro tabs open, you will need to close and re-open them to display the new defaults.

Look up Order Trakker Status on the Find Tab

In Sales Pro's **Find** tab, you can view a work order or invoice's Order Trakker status 2 ways:

1. **Activity** section
2. **Research** section

Look up Order Trakker Status in Activity

In the Activity section of Sales Pro's **Find** tab, a new **OT Status** column has been added for **Work Orders** and **Invoices**. This column displays where each work order or invoice is in your Order Trakker Queue. Click this blue link to open Order Trakker and display the corresponding queue tab.

If a work order or invoice is not in Order Trakker, the **OT Status** column will show a **Send to OT** button. If you click this button, the work order or invoice will be sent to your Order Trakker Queue.

Look up Order Trakker Status with the Research tool

With this version of Checkmate, you can now use Sales Pro's Research section to determine where work orders and invoices are in your Order Trakker Queue. To do so:

1. In the **Research** section of Sales Pro's **Find** tab, search by Quote, Work Order, Invoice, or Purchase Order (you can either enter the number, or click the drop-downs for advanced search options, as in the example below).

2. The **Research Results** window opens. In this window, the **OT Status** column shows where each result is in your Order Trakker Queue. Click this blue link to open Order Trakker and display the corresponding queue tab.

#	Date	Order	Salesperso	Name	Due	Terms	Part	Stock	Amt	Yard	OT Status
1	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	181122	75.00	999	Warehouse
2	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	181122	75.00	999	Warehouse
3	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	191102	50.00	999	Warehouse
4	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	181004	50.00	999	Warehouse
5	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	181004	50.00	999	Warehouse
6	08/24/23	148944	PETERM	EUGENE'S AUTO PARTS	390.00	C.O.D	WHL	140803	90.00	999	Warehouse
7	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	190503	50.00	999	Warehouse
8	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	191019	75.00	999	Warehouse
9	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	181017	50.00	999	Warehouse
10	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	191101	75.00	999	Warehouse
11	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	191101	75.00	999	Warehouse
12	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	191101	75.00	999	Warehouse
13	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	200205	45.00	999	Warehouse
14	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	PO13705	50.27	999	Warehouse
15	08/24/23	148943	PETERM	EUGENE'S AUTO PARTS	545.54	C.O.D	WHL	PO13705	50.27	999	Warehouse
16	06/27/23	148933	PETERM	LARRY'S COLLISION REPAIR	150.00	Chrge	WHL	191104	150.00	999	Warehouse

View   Print   ☑ Use Checkmate Codes   ✓ Select   Close

If a search result has not been sent to Order Trakker, the **OT Status** column will show a **Send to OT** button. If you click this button, the work order or invoice will be sent to your Order Trakker Queue.

OT Status

Send to OT
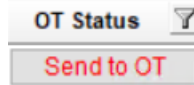
OT Status Information Columns in Sales Pro

In Sales Pro's **Quotes** and **Work Order / Invoice** tabs, there is now an **OT Status** column. The **OT Status** column shows where each part is in your Order Trakker Queue.

Each value in the **OT Status** column is a clickable link. If you click it, a new Order Trakker tab opens, displaying the corresponding queue tab in Order Trakker.
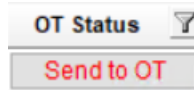

If the part has not been sent to Order Trakker, the **OT Status** column will display **Send to OT**. This is not a button. If you want to send the part to Order Trakker, use either the **Print WO** or **Promote INV** button (for more information, see the **Options When Printing and Promoting Work Orders** section of this guide).

Dashboard New Gadget: Sales not in Order Trakker

This release introduces a new gadget in Checkmate Dashboard: **Sales not in Order Trakker**. This gadget displays all work orders and invoices that were *not* sent to Order Trakker. You can use this to uncover parts that "fell through the cracks" and send them to Order Trakker, if you choose.

Just click the **Send to OT** button on any line to send that work order/invoice to your Order Trakker Queue.

WO / Inv	Sold To	Sales Person	Yard	PO	Order Date	Amount Paid	Amount Due	Total Amount	Payment Type	Send to OT
151915	ZAKIRA'S GARAGE	T O D D	999		05/01/2023	$0.00	$50.00	$50.00	C.O.D.	Send to OT
151914	A & A AUTO & TRUCK SALVAGE	T O D D	999		04/28/2023	$0.00	$500.00	$500.00	Charge	Send to OT
151913	ZAKIRA'S GARAGE	T O D D	999		04/28/2023	$100.00	$0	$100.00	Cash	Send to OT
151912	B & B AUTO BODY	T O D D	999		04/25/2023	$75.00	$75.00	$150.00	C.O.D.	Send to OT
I151911	A & A AUTO & TRUCK SALVAGE	T O D D	999		04/25/2023	$0.00	$1000.00	$1000.00	Charge	Send to OT

Order Trakker: Add Work Orders not Sent to Order Trakker to Queue

If you search for a work order in Order Trakker, but it was *not* sent to Order Trakker, you can now add it, without leaving your Order Trakker screen. To do so,

1. In Order Trakker, go to **Search > for WO Number**.

2. In the window that appears, enter the work order number, and then click **Search**.

3. Your **Search Results** appear. Look at the **Status** column.

- **Not in OT** – Results that *can* be sent to Order Trakker display in red. These parts will show **Not in OT** in the **Status** column.

- **Not OT Eligible** in the **Status** column, it cannot be sent to Order Trakker.

4. Click the **Send to OT button** to add all eligible (**Not in OT**) parts to your queue.

Search Results										
WONumber	**Part#**	**Part**	**Model**	**Year**	**Stock**	**Location**	**Status**	**Assigned**	**Last**	**Yard**
148957		ENG	CAMRY	2012	PETER123		Not in OT			999
148957		CORE	ALTIMA	2013			Not OT Eligible			999
148957		CORE	CAMRY	2012			Not OT Eligible			999
148957		ENG	CAMRY	2007	PO14597		Not in OT			999
148957		CORE	CAMRY	2007			Not OT Eligible			999
148957		ENG	EXPLOR	2013	PO12183	15A00A	Not in OT			999
148957		CORE	EXPLOR	2013			Not OT Eligible			999
148957		ENG	FOCNRS	2013	200205	15A10B	Not in OT			999
148957		CORE	FOCNRS	2013			Not OT Eligible			999
148957		ENG	ALTIMA	2013	161114	TJ9D4	Not in OT			999

✔ Send to OT   ✔ Position to   ✔ Apply   ✖ Cancel

5. The **Search Results** refresh, now showing an updated **Status** for each part added to your Order Trakker Queue.

Search Results										
WONumber	**Part#**	**Part**	**Model**	**Year**	**Stock**	**Location**	**Status**	**Assigned**	**Last**	**Yard**
148957	1/5	ENG	CAMRY	2012	PETER123		Dispatch		09_20_2023	999
148957	2/5	ENG	CAMRY	2007	PO14597		Dispatch		09_20_2023	999
148957	3/5	ENG	EXPLOR	2013	PO12183	15A00A	Warehouse		09_20_2023	999
148957	4/5	ENG	FOCNRS	2013	200205	15A10B	Warehouse		09_20_2023	999
148957	5/5	ENG	ALTIMA	2013	161114	TJ9D4	Warehouse		09_20_2023	999
148957		CORE	ALTIMA	2013			Not OT Eligible			999
148957		CORE	CAMRY	2012			Not OT Eligible			999
148957		CORE	CAMRY	2007			Not OT Eligible			999
148957		CORE	EXPLOR	2013			Not OT Eligible			999
148957		CORE	FOCNRS	2013			Not OT Eligible			999

✔ Send to OT   ✔ Position to   ✔ Apply   ✖ Cancel

AUT Records Have More Characters

For several fields in AUT records, we've increased the maximum number of characters you can enter.

The AUT's **Description** can now be up to 255 characters.

License can now be up to 20 characters.

In the **Purchased from** tab, the **Address** fields and **City** field can now be to up to 30 characters.

Reports: 2 New Daily Register Reports

These 2 reports give you options for balancing your cash drawer at the end of the day. If you use the **Daily Sales Journal** in Checkmate Retro[*], you may find this to be a more user-friendly option for balancing your cash drawer at the end of the day. These 2 reports are available in the **Sales** section of Checkmate Reports:

- **Daily Register Detail Report**

- **Daily Register Summary Report**
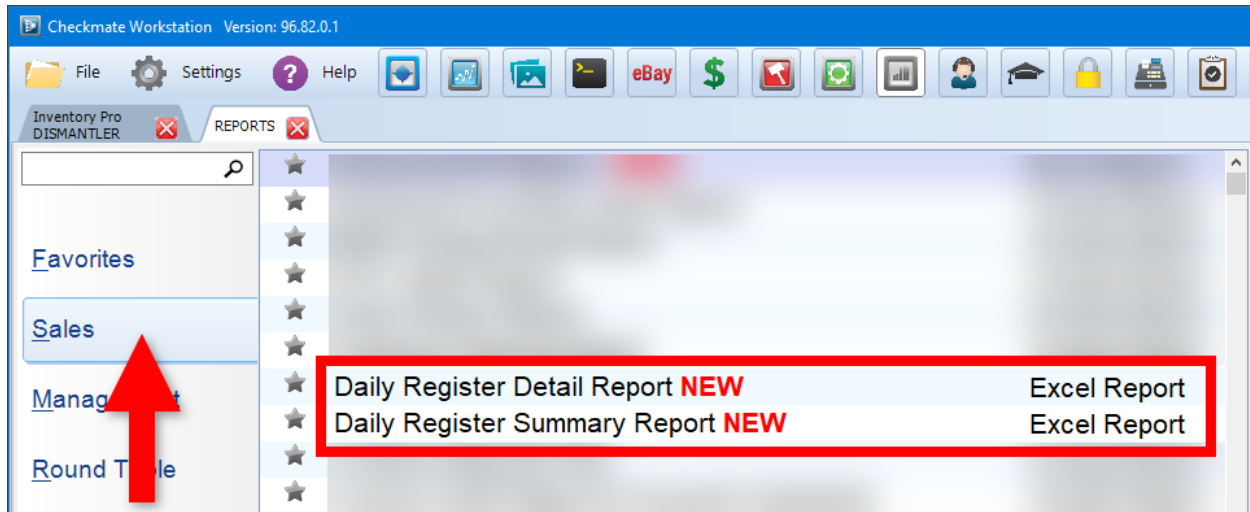
Both reports are similar; however, the **Daily Register Summary** doesn't have all the detailed information that the **Daily Register Detail** report has, which makes the summary faster to run.

⚠️ **Note:**   To use these reports, you must not use delayed invoice posting. This is set in Checkmate Retro using the **Change Invoicing** function (Full: **6,10,1** or Classic: **S3,1** or Junior: contact support).

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[*] Checkmate Full: **3,24** or Checkmate Classic: **A3,20** or Checkmate Junior: **3,24** or **1,10**

Daily Register Detail Report

The **Daily Register Detail Report** shows summaries and detailed information about front office and back office transactions for a selected yard and date range. The cash drawer total is shown along with tax amounts.

The first 2 tabs show summaries with subtotal amounts:

- **FO** (Front Office) **Summary**
- **BO** (Back Office) **Summary**

The additional tabs show details for sales, payments, credits/returns, charges, charge credits, deposits, and pallet charges.

Front Office Detail — Version 1.0

Report Parameters

Enter Yard # -->	999
Enter Start Date -->	10/7/2022
Enter End Date -->	10/7/2022
Click Refresh -->	Refresh

Yard Settings

Country	US
Sales Tax Rate	7%

Abbreviations
FO = Front Office
BO = Back Office
Ttl = Total
FRT = Freight
HST = Harmonized Sales Tax
GST = Goods and Service Tax
C.O.D. = Cash On Delivery
MUN Tax $ = Local tax amount

Total Front Office Transactions

Total # Parts	46
# Cash & Cash Equivalents	70
# FO CashDrawer	30
# FO Credits/Returns	18
# Deposits	8
# Payments	0
# FO Charges	8
# FO Charge Credits	6
# C.O.D.'s	0
Cash $	$3,924.97
Check $	$3,727.42
Money Order $	$0.00
Total Front Office Cash Drawer	**$7,652.39**
Credit Card $	$2,283.44
Paypal $	$0.00
EBT $	$0.00
Venmo $	$0.00
Other $	-$1,647.87
Electronic Transactions Subtotal	**$635.57**
Parts$	$8,957.40
	$0.00
	$0.00
MUN Tax $	$0.00
Tax $	$71.56
Core $	-$956.00
Warranty $	$0.00
Freight $	$215.00
Total Front Office dollar amount	**$8,287.96**

Front Office Cash and Cash Equivalents

Cash $	$3,963.03
Check $	$3,727.42
Money Order $	$0.00
Total FO Sales	**$7,690.45**
Credit Card $	$3,424.48
Paypal $	$0.00
EBT $	$0.00
Venmo $	$0.00
Other $	$85.00
Electronic Transactions Subtotal	**$3,509.48**
Parts$	$10,341.27
	$0.00
	$0.00
MUN Tax $	$0.00
Tax $	$88.66
Core $	$290.00
Warranty $	$0.00
Freight $	$480.00
Total Front Office Transactions	**$11,199.93**

Sales Tax Summary

FO Cash Drawer HST Tax	$0.00
FO Cash Drawer GST Tax	$0.00
FO Cash Drawer MUN Tax	$0.00
FO Cash Drawer Tax/PST	$155.08
FO Credits HST Tax	$0.00
FO Credits GST Tax	$0.00
FO Credits MUN tax	$0.00
FO Credits Tax/PST	-$17.10
FO Charges HST Tax	$0.00
FO Charges GST Tax	$0.00
FO Charges MUN Tax	$0.00
FO Charges Tax/PST	$0.00
FO Charge Credits HST Tax	$0.00
FO Charge Credits GST Tax	$0.00
FO Charge Credits MUN Tax	$0.00
FO Charge Credits Tax/PST	$0.00
Total Tax Amount	**$137.98**

Front Office Credits/Returns

Cash $	-$154.07
Check $	$0.00
Money Order $	$0.00
Total FO Cash Credits	**-$154.07**
Credit Card $	-$1,866.04
Paypal $	$0.00
EBT $	$0.00
Venmo $	$0.00
Other $	-$1,732.87
Total FO Electronic Credits	**-$3,598.91**
Parts $	-$2,245.88
	$0.00
	$0.00
MUN Tax $	$0.00
Tax $	-$17.10
Core $	-$1,225.00
Warranty $	$0.00
Freight $	-$265.00
Total FO Credit Transactions	**-$3,752.98**

Front Office C.O.D.s

Parts $	$0.00
Core $	$0.00
Warranty $	$0.00
Freight $	$0.00
Total C.O.D. $	**$0.00**

Front Office Payments

Cash $	$0.00
Check $	$0.00
Money Order $	$0.00
Total Cash Payments	**$0.00**
Credit Card $	$0.00
Paypal $	$0.00
EBT $	$0.00
Venmo $	$0.00
Other $	$0.00
Total Electronic Payments	**$0.00**
Total Payments Amount	**$0.00**

Front Office Charges

Part $	$1,007.70
	$0.00
	$0.00
MUN Tax $	$0.00
Tax $	$0.00
Core $	$0.00
Warranty $	$0.00
Freight $	$0.00
Total Charge Amount	**$1,007.70**

Front Office Charge Credits

Part $	-$812.00
	$0.00
	$0.00
MUN Tax $	$0.00
Tax $	$0.00
Core $	-$21.00
Warranty $	$0.00
Freight $	$0.00
Total Charge Credits Amount	**-$833.00**

Front Office Deposits

Cash $	$116.01
Check $	$0.00
Money Order $	$0.00
Total Cash Deposits	**$116.01**
Credit Card $	$725.00
Paypal $	$0.00
EBT $	$0.00
Venmo $	$0.00
Other $	$0.00
Total Electronic Deposits	**$725.00**
Total Deposits Amount	**$841.01**

Front Office Pallet Charges

Cash	$0.00
Check	$0.00
Money Order	$0.00
Total Cash Pallet Amount	**$0.00**
Credit Card	$0.00
Paypal	$0.00
EBT	$0.00
Venmo	$0.00
Account	$0.00
Other	$0.00
Total Electronic Pallet $	**$0.00**
Total Pallet Amount	**$0.00**

Tabs: FO_Summary | BO_Summary | FO_Sales | FO_Credits | FO_Deposits | FO_Payments | FO_Charges | FO_Charge_Credits | COD | Pallet_Charges | BO_Payments | BO_Credits | BO_Deletions | +

Daily Register Summary Report

The **Daily Register Summary Report** shows a summary of front office and back office transactions for a selected yard and date range. The cash drawer total is shown along with tax amounts.

	A	B	D	E	G	H	J	K
1	**Sales Register Summary**			Version 1.0				
2								
3	**Report Parameters**		**Total Cash and Cash Equivalents FO & BO**		**Total Front Office Amounts**		**Back Office Payments**	
4	**Enter Yard # -->**	999	Cash $	$3,924.97	Cash $	$3,924.97	Cash	$0.00
5	**Enter Start Date -->**	10/7/2022	Check $	$7,464.42	Check $	$3,727.42	Check	$3,737.00
6	**Enter End Date -->**	10/7/2022	Money Order $	$0.00	Money Order $	$0.00	Money Order	$0.00
7	**Click Refresh -->**	Refresh	**Total Cash Drawer**	$11,389.39	**Total Cash and Cash Equivalents**	$7,652.39	**Total Cash and Cash Equivalents**	$3,737.00
8								
9	**Yard Settings**		Credit Card $	$2,283.44	Credit Card $	$2,283.44	Credit Card	$0.00
10	Country	US	Paypal $	$0.00	Paypal $	$0.00	Paypal	$0.00
11	Sales Tax Rate	7%	EBT $	$0.00	EBT $	$0.00	EBT	$0.00
12			Venmo $	$0.00	Venmo $	$0.00	Venmo	$0.00
13			Other $	-$1,647.87	Other $	-$1,647.87	Other	$0.00
14			**Electronic Transactions Subtotal**	$635.57	**Electronic Transactions Subtotal**	$635.57	**Electronic Transactions Subtotal**	$0.00
15								
16					Parts $	$8,890.98		$0.00
17			Parts $	$12,694.40				$0.00
18	**Abbreviations**			$0.00		$0.00	Tax $ (Includes MUN Tax)	$0.00
19	FO = Front Office			$0.00		$0.00	**Total Back Office Amount**	$3,737.00
20	BO = Back Office		MUN Tax $ (Information Only)	$0.00	MUN Tax $ (Information Only)	$0.00		
21	Ttl = Total		Tax $ (Includes MUN Tax)	$71.56	Tax $ (Includes MUN Tax)	$137.98	**Back Office Credits**	
22	EBT = Electronic Balance Transfer		Core $	-$956.00	Core $	-$956.00	Charge	$0.00
23	FRT = Freight		Warranty $	$0.00	Warranty $	$0.00	Freight	$0.00
24	HST = Harmonized Sales Tax		Freight $	$215.00	Freight $	$215.00		$0.00
25	GST = Goods and Service Tax		**Total Transactions**	$12,024.96	**Total Front Office Amount**	$8,287.96		$0.00
26	PST = Provincial Sales Tax						Tax $ (Includes MUN Tax)	$0.00
27	MUN Tax = Local Tax Rate						**Total Amount**	$0.00
28	C.O.D. = Cash On Delivery		**Front Office Breakout**		**Total Front Office Transactions**			
29			Total FO Sales	$12,213.44	Total # Parts	46	**Total Back Office Transactions**	
30			Total FO Deposits	$841.01			# BO Payments	11
31			Total FO Credits	-$3,752.98	# FO CashDrawer	30	# BO Credits	0
32			Front Office Payments	$0.00	# FO Credits/Returns	18	# Document Invoice Deletions	0
33			Front Office Charges	$1,007.70	# Deposits	8	# Document Cr/Rtn Deletions	0
34			Front Office Charge Credits	-$833.00	# Payments	0	# Ducument Debit Deletions	0
35			Deposits	$841.01	# FO Charges	8	**Total # BO Transactions**	11
36			Pallet Charges	$0.00	# FO Charge Credits	6		
37			COD's	$0.00	# C.O.D.'s	0		
38			Total BO Payments	$3,737.00	**Total # FO Transactions**	70		
39			Total BO Credits	$0.00				
40								

Requirements_Directions_Info | **Register Summary** | +

Reports: 2 New Vehicles per Employee Reports

These 2 reports are the Excel versions of two existing Crystal reports.

Both reports show the average number of vehicles entered per employee for the selected yard, for the current year and previous three years. Each report shows data in a table with two additional tabs that show charts.

- The **RT Vehicles per Employee Report** shows vehicles per employee by quarter.

This report is on the **Round Table** tab

- The **Vehicles per Employee Report** shows vehicles per employee by month.

	A	B	C	D	E	F	G	H	I

Vehicles Per Employee Report

Report Parameters	
Yard Number	999
Condition to Exclude	
Condition to Exclude	
Condition to Exclude	
Condition to Exclude	
Condition to Exclude	
Refresh	Refresh

Today's Date — 11/8/2023

Row Labels	# of Vehicles	# of Employees	Vehicles Per Employee
2020	67	6.3	0.89
January	14	7.0	2.00
February	10	7.0	1.43
March	1	6.0	0.17
April	2	6.0	0.33
May	4	6.0	0.67
June	6	6.0	1.00
July	10	6.0	1.67
August	4	6.0	0.67
September	8	7.0	1.14
October	3	6.0	0.50
November	2	6.0	0.33
December	3	6.0	0.50
2021	16	0.0	0.00
January	0	0.0	0.00
February	2	0.0	0.00
March	3	0.0	0.00
April	1	0.0	0.00
May	1	0.0	0.00
June	0	0.0	0.00
July	0	0.0	0.00
August	4	0.0	0.00
September	0	0.0	0.00
October	3	0.0	0.00
November	0	0.0	0.00
December	2	0.0	0.00

Tabs: Requirements_Directions_Info | User Inputs | Chart1 | Chart2 | +
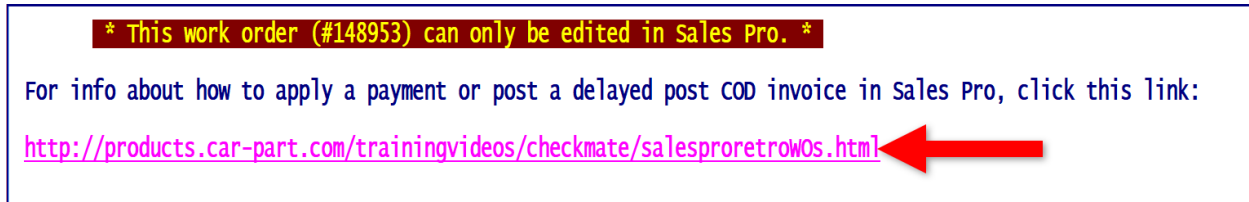
This report is on the **Management** tab.

Retro Users: Work Order Editing Changes

There are now limitations for editing work orders between Checkmate Sales Pro and Checkmate Retro.

Sales Pro Work Orders in Retro

In Checkmate Retro, if you look up a work order that was created or previously edited in Checkmate Sales Pro, a message displays, saying the work order can only be edited in Sales Pro:

> *** This work order (#148953) can only be edited in Sales Pro. ***
>
> For info about how to apply a payment or post a delayed post COD invoice in Sales Pro, click this link:
>
> http://products.car-part.com/trainingvideos/checkmate/salesproretrowOs.html

- To edit the work order or apply a payment, take note of the work order number (shown in the message), look up the work order in Checkmate Sales Pro, and make your changes there. If you need help doing this in Sales Pro, click the link in the message to watch a video.

- Press Enter on your keyboard, to view the work order in Checkmate Retro. You *can* still view, print, and promote a Sales Pro work order directly (with no changes) to an invoice in Checkmate Retro.

Retro Work Orders in Sales Pro

If you attempt to edit a work order in Checkmate Sales Pro that was originally created in Checkmate Retro, a warning will display, asking if you want to convert the Retro work order to a Sales Pro work order:

- **Accept** – Convert the Retro work order to a Sales Pro work order. This enables you to edit this work order in Sales Pro, but prevents it from being edited in Checkmate Retro anymore (you can still print, view, or promote it to an invoice in Checkmate Retro).

- **Cancel** – Click to leave it as a Retro work order. You will not be able to edit this work order in Sales Pro, but you will retain all editing abilities in Checkmate Retro.

- (Optional) **Remember selection** – Click this checkbox to apply the selected option to all future attempts to edit Retro work orders in Sales Pro and keep this message from displaying again in the future.[*]

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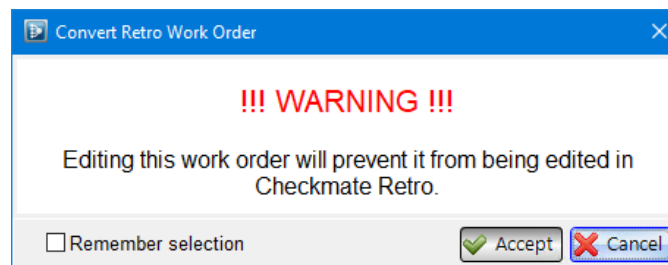
[*] If you check **Remember selection**, this message will not display again. If you want to change your selection on this message in the future, you can reset this message. In the top left menu bar, go to ⚙ *Settings>Workstation>Sales Pro* tab*>Misc* tab, and click the option to **Reset displaying of warning when trying to edit Retro Work Orders**.

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!