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This Guide Authored by Randy Hoggard for Buddy AI LLC.



Buddy Main Inventory Quick Start Guide

1. About This Guide

1.1. Purpose

The purpose of this guide is to aid you in learning to use the Buddy Main Inventory Module. The guide can be used by both experienced and inexperienced users. New users may want to read the entire manual; experienced users may just need to look up a specific functionality using the table of contents.

1.2. Organization

This user guide is divided into the following parts:

Chapter 1 About This Guide- Explains the purpose of this guide, details its organization, and discusses any special notes, warnings, or conventions.

Chapter 2 Download Vehicle(s) to Buddy – Without Batch file- A step by step task list of the actions required to send a vehicle to the Buddy handheld for inventorying; starting from Procomm running Checkmate.

Chapter 3 Download Vehicle(s) to Buddy – With Batch file- A step by step task list of the actions required to send a vehicle to the Buddy handheld for inventorying; starting from the handheld itself.

Chapter 4 Inventorying on the handheld- Describes how to enter parts and save them along with how to assign ARA damage codes.

Chapter 5 Final Desktop Review- Shows the steps for opening a car in FDR, adjusting pricing, viewing reports, and marking a vehicle for export to your IMS.

Chapter 6 Uploading Inventoried Parts into Checkmate- Describes how process vehicles into your IMS and to delete completed vehicles from the handheld.

1.3. Conventions Used in the Guide

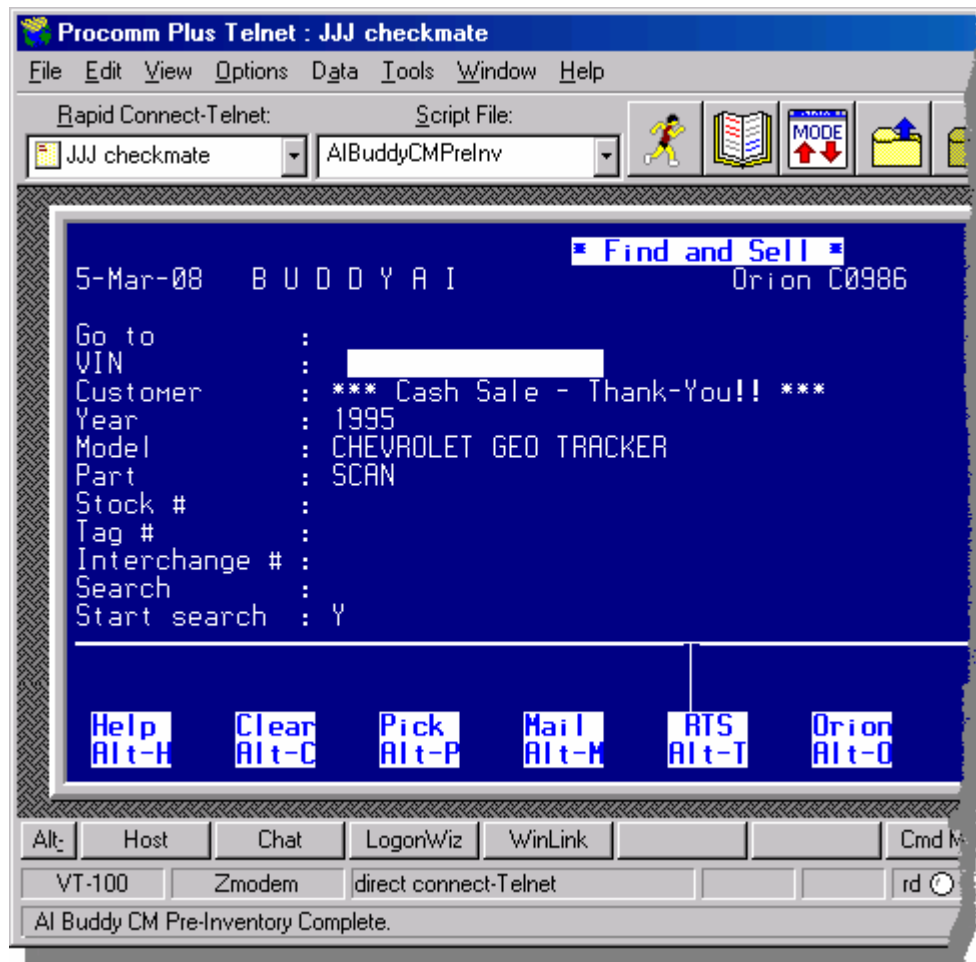
Icon, keyboard, field, window, tab, button, menu, and option names are in **bold**. Steps in the task-based procedures are in **bold** and numbered. Steps the user must perform are in a yellow box in the left column. When appropriate, descriptions of the results for a step are described in the right hand column. Screen prints related to a step follow the step. When a reference is made to another section within the guide, the reference will be in *italic*.

This guide is formatted with a large left margin to facilitate printing and storing in a three ring binder or folder.

2. Download Vehicle(s) to Buddy – Without Batch file

To work with your vehicle within Buddy Main Inventory, you must first download the vehicle to your Handheld. One method to accomplish this is by entering the vehicles directly from Procomm. This is described in the steps that follow.

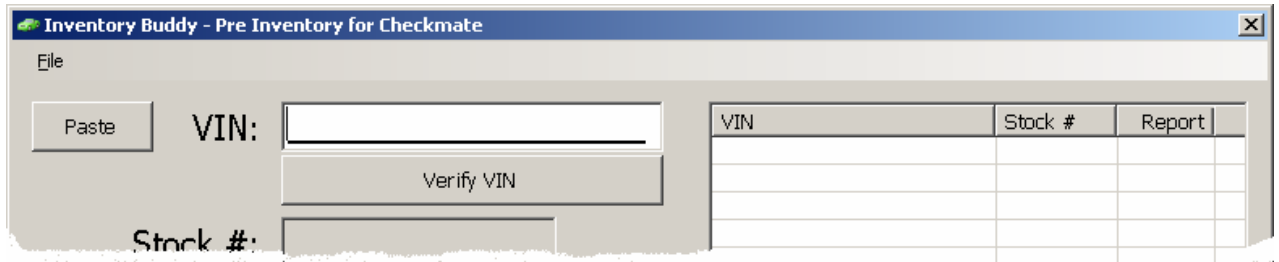
Task	Description/Result
1. Launch Procomm and log into Checkmate as you normally do.	
2. Make sure the Handheld is Docked in the cradle and the Buddy program is running.	
3. In Checkmate, go to the Main Menu.	Note: The Buddy scripts must be run while sitting at the Checkmate Main menu.



4. On your keyboard, while holding down the Control key press the F1 key.

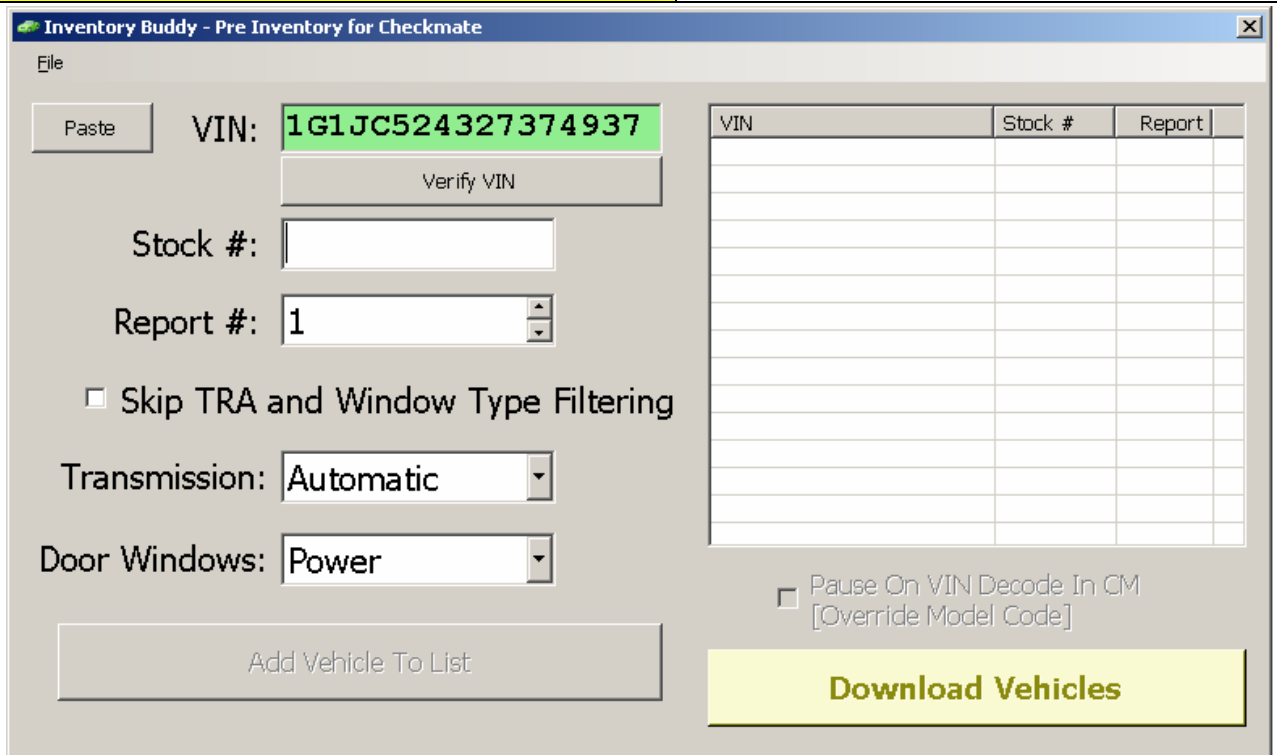
The Pre Inventory for Checkmate window displays.

Cont. next page



5. In the VIN field, type the VIN for the car you want to inventory.

The field turns green when a valid VIN is entered.



6. Type the stock number for the vehicle

Stock #: OU812

7. Use the up or down arrows to select an appropriate Dismantler Report

Report #: 1

The report numbers are from the Dismantler Reports you have created in Checkmate.

8. If you know the Tranny and Window Control type, leave this box un-checked

Skip TRA and Window Type Filtering

Leaving this box un-checked and filling in the next two fields, will help limit the options you have to choose from while inventorying.

Cont. next page

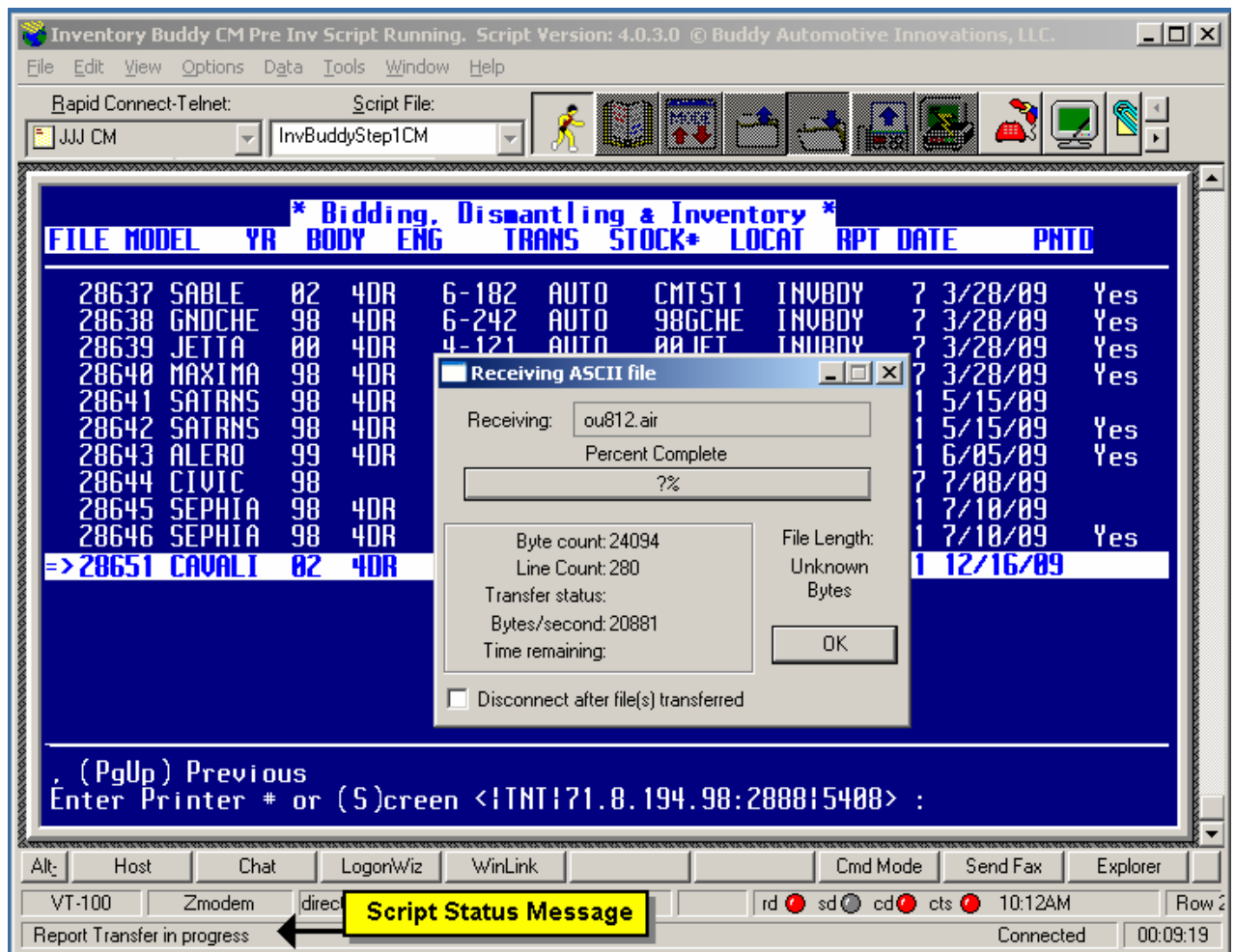
15. As the script continues, the Receiving ASCII file box displays.

Do Not click on the buttons on this box, it will close on its own when this stage completes.

16. You can watch the Script Status Message to determine if the script is still running and when the script has finished.



It is important to NOT use the keyboard while Buddy scripts are running unless you minimize Procomm first.



FILE	MODEL	YR	BODY	ENG	TRANS	STOCK*	LOCAT	RPT DATE	PNTD
28637	SABLE	02	4DR	6-182	AUTO	CMTST1	INUBDY	7 3/28/09	Yes
28638	GNDCHE	98	4DR	6-242	AUTO	98GCHE	INUBDY	7 3/28/09	Yes
28639	JETTA	00	4DR	4-121	AUTO	00JET	INUBDY	7 3/28/09	Yes
28640	MAXIMA	98	4DR					1 5/15/09	
28641	SATRNS	98	4DR					1 5/15/09	Yes
28642	SATRNS	98	4DR					1 6/05/09	Yes
28643	ALERO	99	4DR					7 7/08/09	
28644	CIVIC	98						1 7/10/09	
28645	SEPHIA	98	4DR					1 7/10/09	Yes
28646	SEPHIA	98	4DR					1 7/10/09	Yes
=>28651	CAVALI	02	4DR					1 12/16/09	

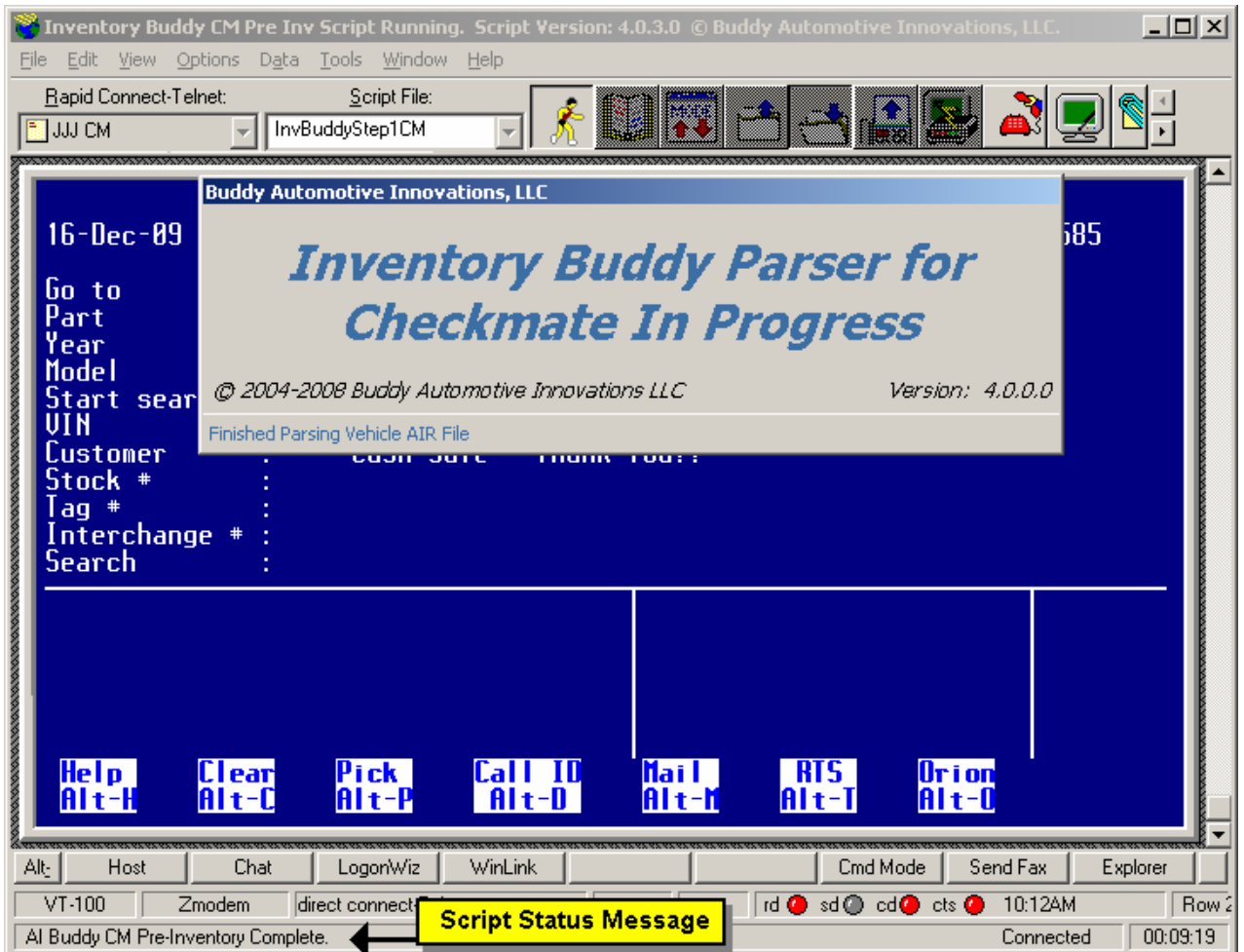
(PgUp) Previous
Enter Printer # or (S)creen <TNT!71.8.194.98:288815408> :

Alt Host Chat LogonWiz WinLink Cmd Mode Send Fax Explorer
VT-100 Zmodem direct **Script Status Message** rd sd cd cts 10:12AM Row 2
Report Transfer in progress Connected 00:09:19

Cont. next page


17. As the script continues the Receiving ASCII file box closes.

In a few seconds the **AI Buddy Parser In Progress** banner displays. The Script Status Message changes to "AI Buddy CM Pre-Inventory Complete". When the banner no longer displays the script is finished.



18. Allow Active Sync to synchronize your Handheld with your PC.

Most syncs occur automatically about every 30 seconds.

The Active sync icon  will stop spinning when complete.

The vehicle(s) you entered display on the Buddy Program on the handheld.

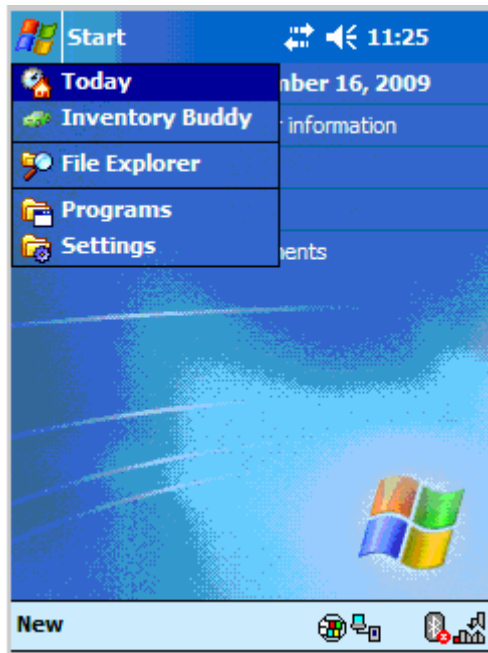
19. You may now disconnect the handheld from the cradle or cable and walk to the vehicle to begin the inventory process.

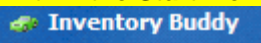

This section complete.

3. Download Vehicle(s) to Buddy – With Batch file

To work with your vehicle within Buddy Main Inventory, you must first download the vehicle to your Handheld. One method to accomplish this is by first entering the vehicles on the handheld, then processing them later from within Procomm. This is described in the steps that follow.

Task	Description/Result
1. On the Handheld, click 	The Start Menu opens, displaying available programs.



2. Within the Start Menu, click 	The Start Menu closes, and after a brief moment the “thinking icon”  stops and the Inventory Buddy program opens to the splash screen.
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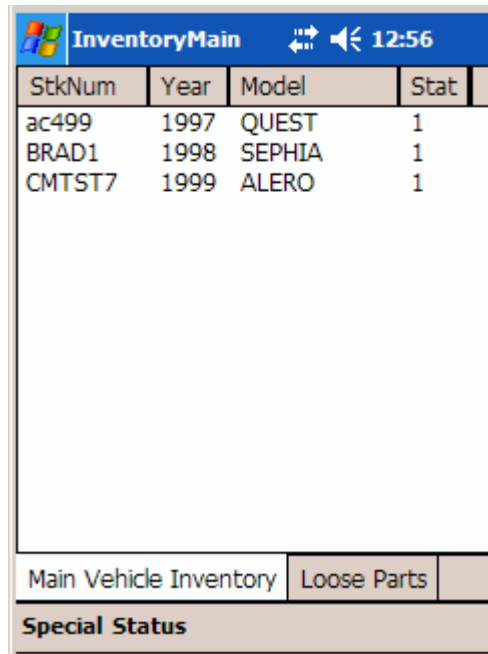
Cont. next page



3. Click

Run Main Program

The **InventoryMain** screen opens, displaying any vehicles already loaded.

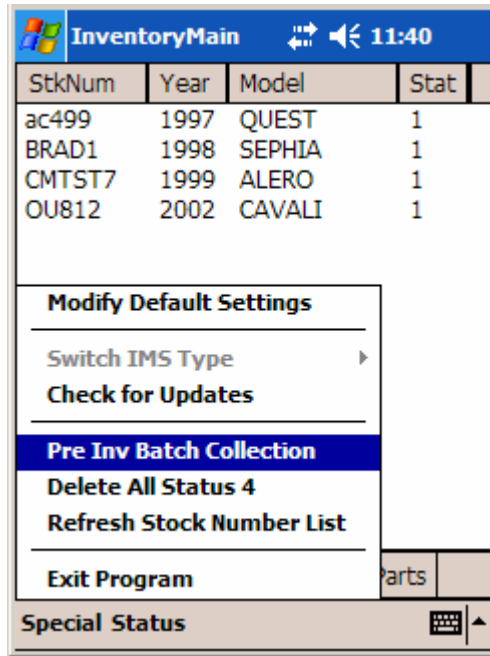


4. Click

Special

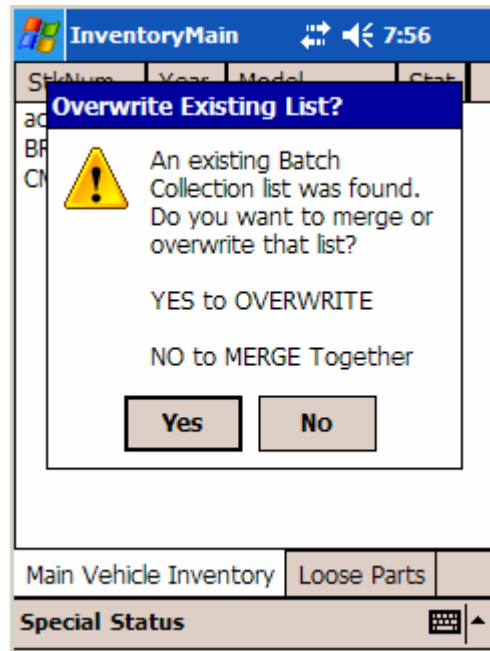
The **Special** pop-up menu list displays.

Cont. next page



5. Click the “Pre Inv Batch Collection” menu item.

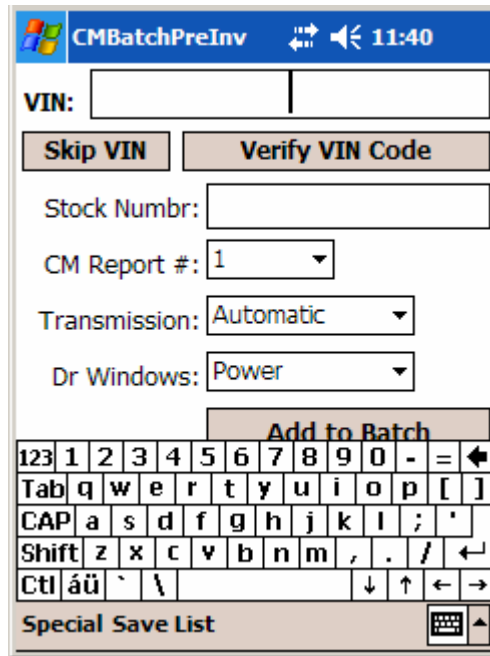
The pop-up menu closes and the **CMBatchPreInv** screen displays. If a previous batch list exists, a pop-up box displays as well.



6. Click to start a new batch, or
Click to merge with previous one.

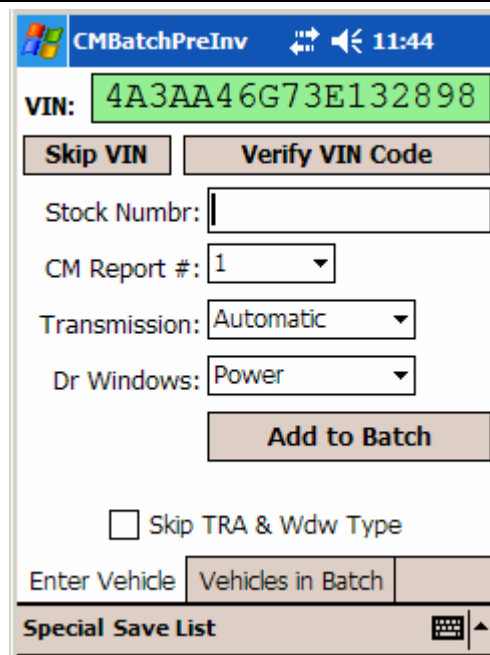
The pop-up box closes and the **CMBatchPreInv** screen displays. The cursor is in the VIN field ready for input.

Cont. next page



7. In the VIN field, type the VIN for the car you want to inventory. Alternatively, if you have a scanner, you can scan the VIN bar code.

The field turns green when a valid VIN is entered.

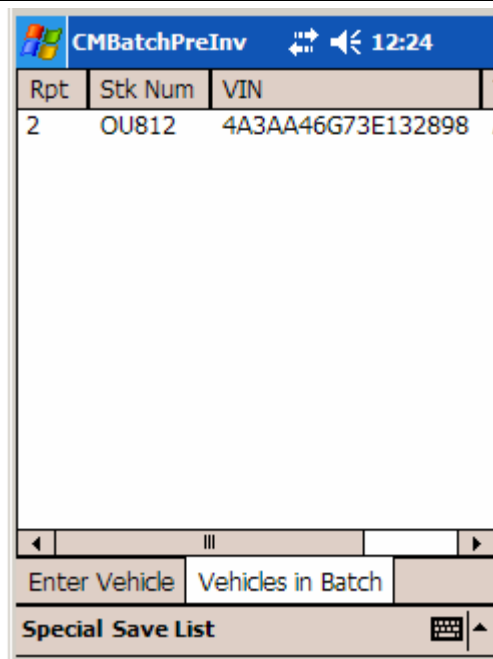


8. Type the stock number for the vehicle

Stock Numbr:

Cont. next page

<p>9. Use the up or down arrows to select an appropriate Dismantler Report</p> <p>CM Report #: <input type="text" value="2"/></p>	<p>The report numbers are from the Dismantler Reports you have created in Checkmate.</p>
<p>10. If you know the Tranny and Window Control type, leave this box un-checked</p> <p><input type="checkbox"/> Skip TRA & Wdw Type</p>	<p>Leaving this box un-checked and filling in the next two fields, will help limit the options you have to choose from while inventorying.</p>
<p>11. Using the drop-down list, select the appropriate Tranny type</p> <p>Transmission: <input type="text" value="Automatic"/></p>	<p>This field is ignored if the box is checked in step 10.</p>
<p>12. Using the drop-down list, select the appropriate Door Window Control type</p> <p>Dr Windows: <input type="text" value="Power"/></p>	<p>This field is ignored if the box is checked in step 10.</p>
<p>13. Click <input type="button" value="Add to Batch"/></p>	<p>The vehicle you entered is added to the batch list of vehicles, and the screen fields are blanked out, ready for another vehicle.</p>
<p>14. If you have more vehicles to enter, repeat steps 7 through 13</p>	<p>After adding all the vehicles, go to step 15.</p>
<p>15. To review your vehicle list click the tab <input type="button" value="Vehicles in Batch"/></p>	<p>The tab view changes to display a list of all vehicles entered.</p>



<p>16. Click <input type="button" value="Save List"/></p>	<p>The CMBatchPreInv window closes and you are returned to the Main vehicle Inventory tab of the Inventory Main screen. Cont. next page</p>
---	---

17. The batch list has now been saved.

The list will automatically be copied to your PC on the next Activesync connection.

InventoryMain			
StkNum	Year	Model	Stat
ac499	1997	QUEST	1
BRAD1	1998	SEPHIA	1
CMTST7	1999	ALERO	1

Main Vehicle Inventory Loose Parts

Special Status

18. Return to your PC and dock or cradle the Handheld.

Active sync will automatically begin syncing your batch last.

19. Allow Active Sync to synchronize your Handheld with your PC.

Most syncs occur automatically about every 30 seconds.

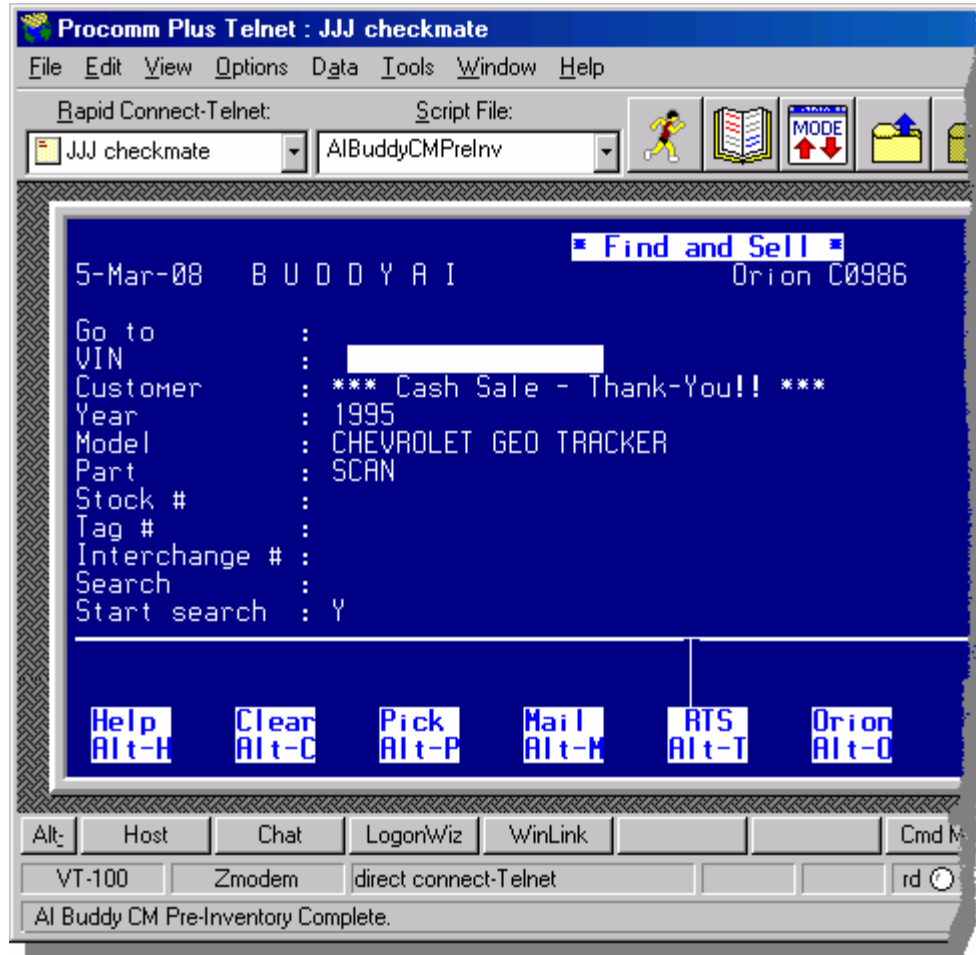
The Active sync icon  will stop spinning when complete.

20. Launch Procomm and log into Checkmate as you normally do.

Cont. next page

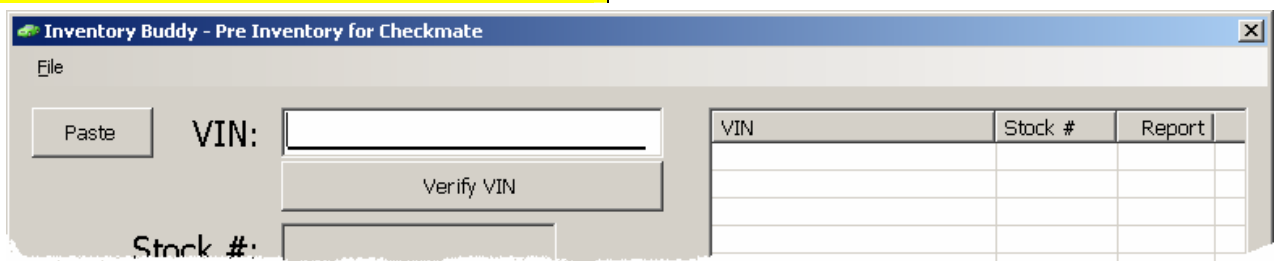
21. In Checkmate, go to the Main Menu.

Note: The Buddy scripts must be run while sitting at the Checkmate Main menu.



22. On your keyboard, while holding down the Control key press the F1 key.

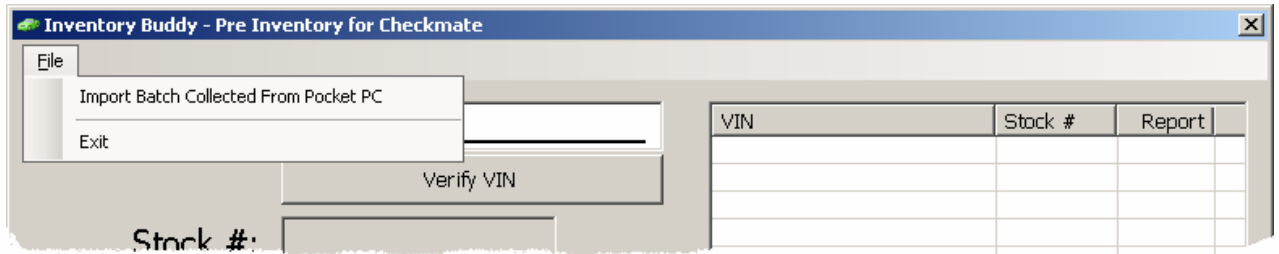
The Pre Inventory for Checkmate window displays.



Cont. next page

23. Click the File menu at top left of window

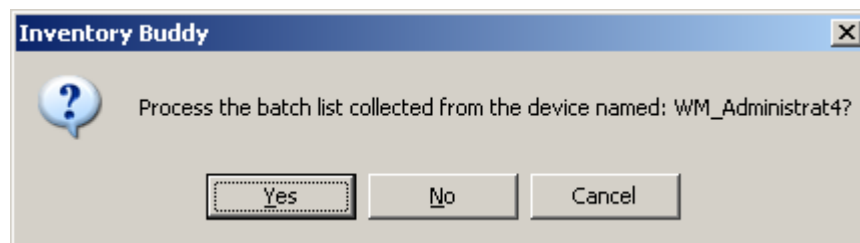
The menu displays a list of options.



24. Click

Import Batch Collected From Pocket PC

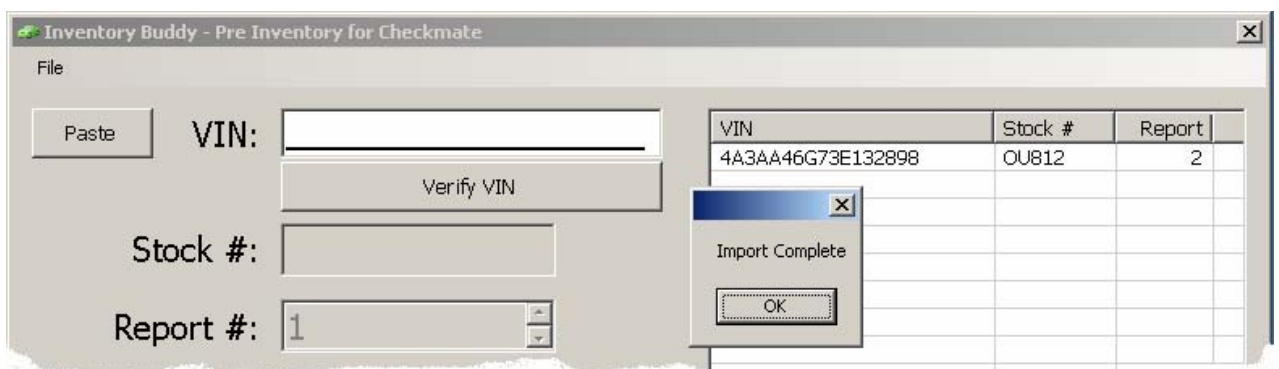
A dialog box displays, asking if you want to process the batch list.



25. Click

Yes

The dialog box closes and the **PreInventory for Checkmate** window displays with a confirmation notice.



26. Click on the confirmation notice.

The confirmation box closes and the **PreInventory for Checkmate** window displays a list of the vehicles from your batch list.

Cont. next page

28. As the script continues, the Receiving ASCII file box displays.

Do Not click on the buttons on this box, it will close on its own when this stage completes.

29. You can watch the Script Status Message to determine if the script is still running and when the script has finished.



It is important to NOT use the keyboard while Buddy scripts are running unless you minimize Procomm first.

FILE	MODEL	YR	BODY	ENG	TRANS	STOCK*	LOCAT	RPT DATE	PNTD
28637	SABLE	02	4DR	6-182	AUTO	CMTST1	INUBDY	7 3/28/09	Yes
28638	GNDCHE	98	4DR	6-242	AUTO	98GCHE	INUBDY	7 3/28/09	Yes
28639	JETTA	00	4DR	4-121	AUTO	00JET	INUBDY	7 3/28/09	Yes
28640	MAXIMA	98	4DR					1 5/15/09	
28641	SATRNS	98	4DR					1 5/15/09	Yes
28642	SATRNS	98	4DR					1 6/05/09	Yes
28643	ALERO	99	4DR					7 7/08/09	
28644	CIVIC	98						1 7/10/09	
28645	SEPHIA	98	4DR					1 7/10/09	Yes
28646	SEPHIA	98	4DR					1 7/10/09	Yes
=>28651	CAVALI	02	4DR					1 12/16/09	

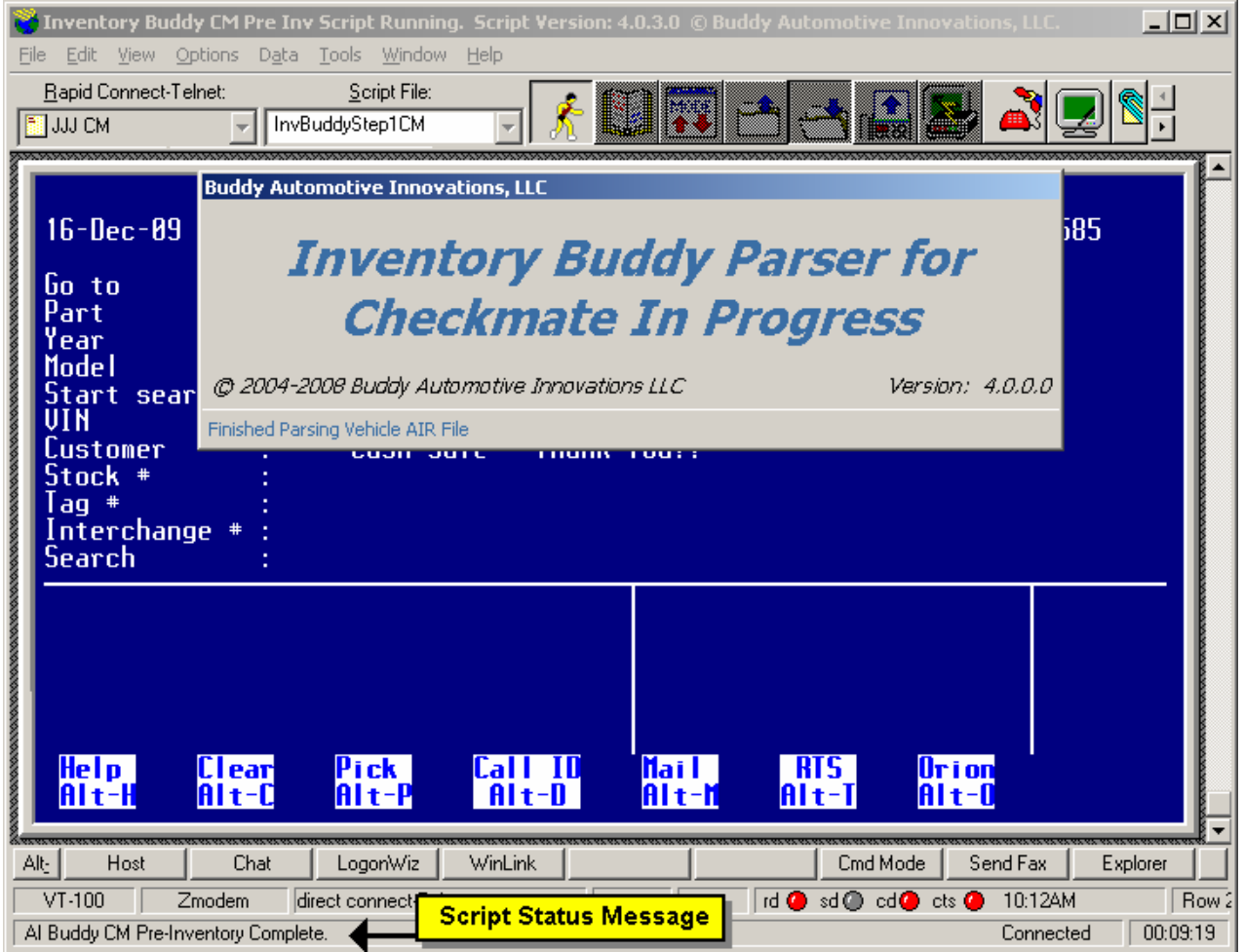
(PgUp) Previous
Enter Printer # or (S)creen <|TNT|71.8.194.98:288815408> :

Alt Host Chat LogonWiz WinLink Cmd Mode Send Fax Explorer
VT-100 Zmodem direct **Script Status Message** rd sd cd cts 10:12AM Row 2
Report Transfer in progress Connected 00:09:19

Cont. next page


30. As the script continues the Receiving ASCII file box closes.

In a few seconds the **AI Buddy Parser In Progress** banner displays. The Script Status Message changes to "AI Buddy CM Pre-Inventory Complete". When the banner no longer displays the script is finished.



31. Allow Active Sync to synchronize your Handheld with your PC.

Most syncs occur automatically about every 30 seconds.

The Active Sync icon  will stop spinning when complete.

The vehicle(s) you entered display on the Buddy Program on the handheld.

32. You may now disconnect the handheld from the cradle or cable and walk to the vehicle to begin the inventory process.

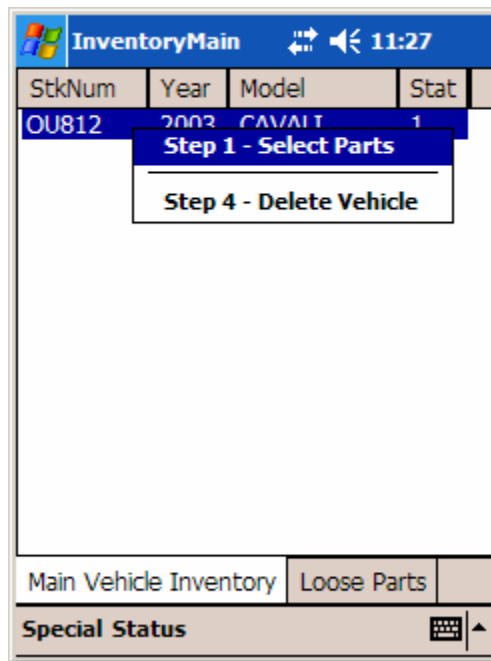
This section complete.

4. Inventorying on the handheld

After you have loaded your vehicles onto the Handheld, you can uncradle or uncable from your PC and carry the Handheld to your vehicle. On the Handheld the vehicle is listed as Status 1 (Ready to Select Parts). This section describes how to take inventory of the parts on the vehicle.

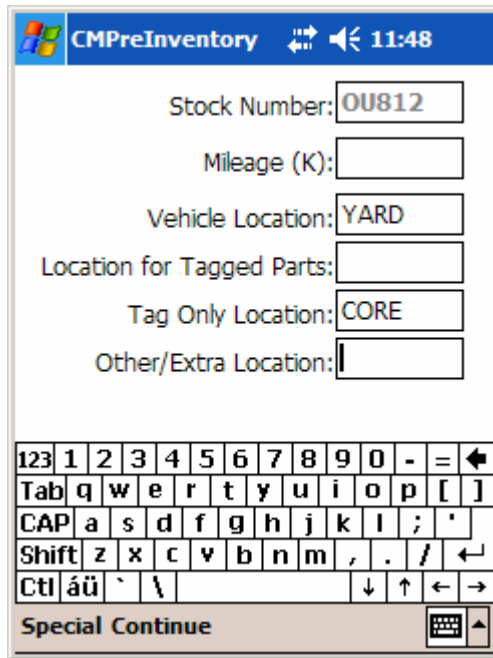
4.1. Starting the Inventory Process on the handheld

Task	Description/Result
<p>1. On the Handheld, tap and hold on the row of the vehicle you want to inventory. Example: <input type="text" value="OU812"/> <input type="text" value="2003"/> <input type="text" value="CAVALI"/></p>	<p>The sub-menu displays allowing you to Step 1 – Select Parts or Step 2 – Delete Vehicle.</p>



<p>2. Tap on <input type="button" value="Step 1 - Select Parts"/></p>	<p>The InventoryMain screen closes and the CMPreInventory opens for the vehicle you selected.</p>
--	---

Cont. next page

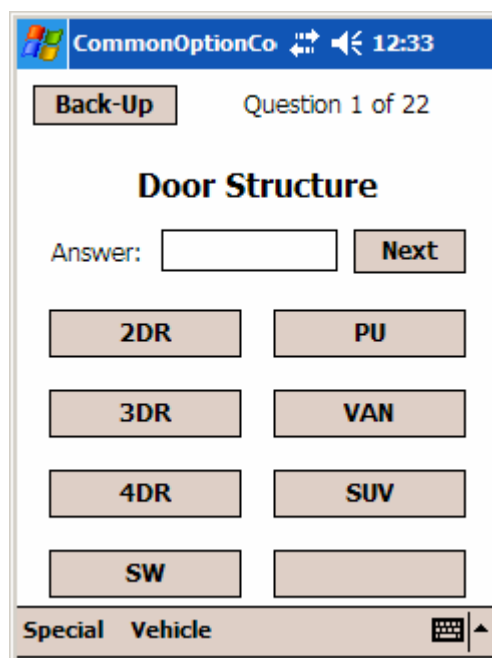


<p>3. Tap in the Mileage (K): <input type="text"/> field to give it focus, then using the Handheld's on screen keyboard, enter the mileage (if known) for the vehicle.</p>	<p>NOTE: Enter thousands only. Leaving this field blank will automatically record a zero for mileage.</p> <p>Your entry here will automatically be applied to the Condition field of each drive train part you inventory.</p>
<p>4. Check the Vehicle Location: <input type="text"/> field and enter the correct location if the default location is not what you want.</p>	<p>NOTE: You can drag the stylus over a word to highlight it, then when you begin typing the highlighted letters will be overwritten.</p> <p>Your entry here will automatically be applied to the Location field of each part you inventory.</p>
<p>5. Observe the rest of the fields and edit them as needed.</p>	
<p>6. After you are satisfied with the Pre Inventory data, tap Continue at the bottom of the screen.</p>	<p>The CMPreInventory screen closes and the CommonOptionCodes screen displays.</p>

Cont. next page

4.2. Common Option Codes

Task	Description/Result
	<p>NOTE 1: Answering the Common Option Code questions does not influence Interchange choices. The answers are only applied to the user descriptions of relevant part types to give counterpart persons additional information about the vehicle the parts came from.</p>
	<p>NOTE 2: Common Option Code questions and answers are customizable to meet the needs of your business practices.</p>
	<p>NOTE 3: Common Option Code questions are optional. To skip a single question tap Next, to skip all questions tap Special, and then Skip Over Common Option Codes.</p>



<p>1. Tap on the answer button that applies to the displayed question. Example: 2DR</p>	<p>The tapped answer displays in the answer box and the screen moves to the next question.</p>
<p>2. Answer the remaining questions.</p>	<p>NOTE: If an appropriate answer is not listed, you can tap in the blank Answer box and the keyboard displays, allowing you to type in your own answer. Tap Next after typing in your own answer.</p>

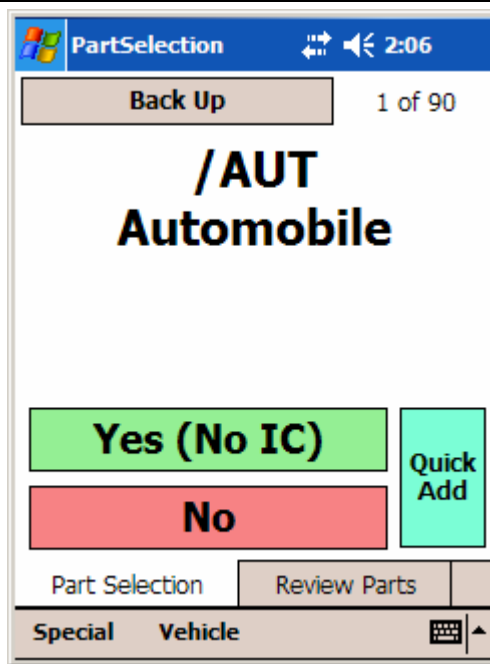
Cont. next page

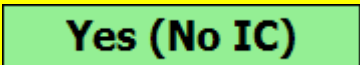
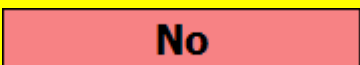
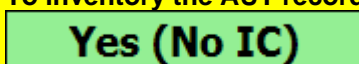
4.3. Editing and Saving the AUT Record

Task	Description/Result
------	--------------------

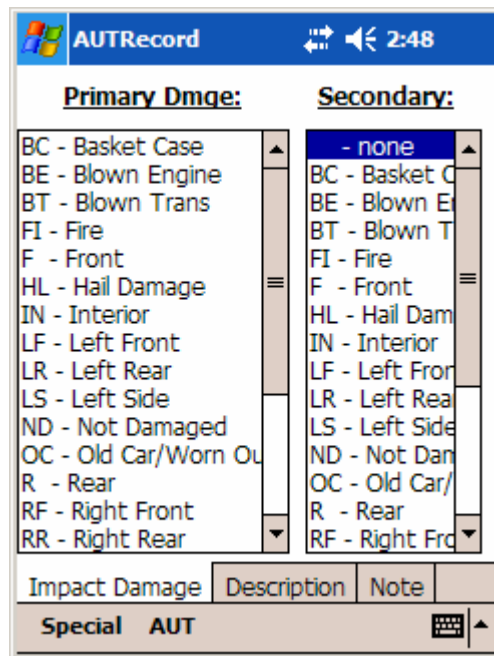
After answering the last Common Option Code question, the first item from the Dismantler Report displays within the **PartSelection** screen. This is from the Dismantler Report you chose when you downloaded the vehicle to the Buddy.

In the following example, the AUT record is the first part type from the Dismantler Report.



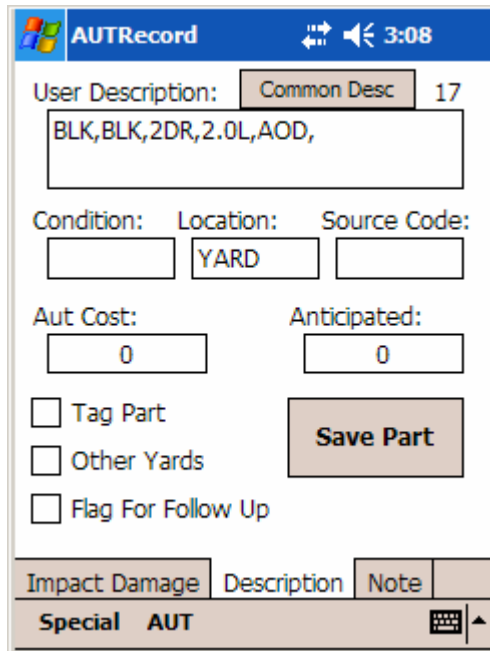
<p>1. Tap  to inventory the displayed part type.</p> <p>Tap  to skip this part and go to the next one.</p>	<p>NOTE: If there is no Hollander interchange for the part type, then (No IC) is displayed on the Yes button.</p>
<p>2. To inventory the AUT record tap .</p>	<p>The PartSelection screen closes and the AUTRecord screen displays its Impact Damage tab.</p> <p>NOTE: The AUTRecord screen is arranged differently from other part types.</p>

Cont. next page



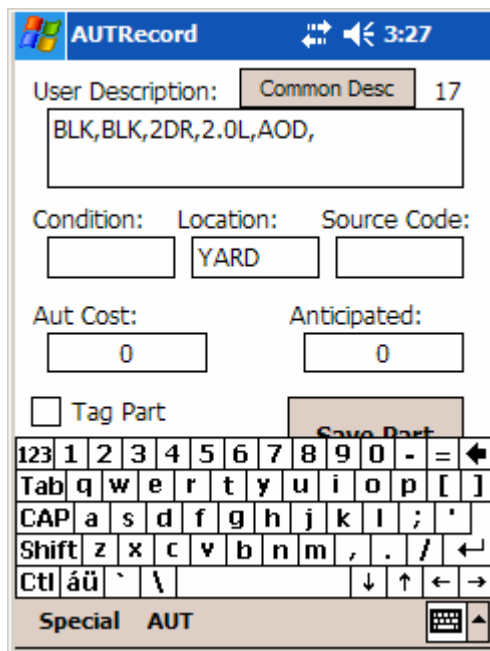
<p>3. Within the Primary Dmge panel, tap on the damage type.</p>	<p>The listing is highlighted.</p>
<p>4. Within the Secondary panel tap on the damage type.</p>	<p>If you do not need to indicate secondary damage you can leave the default listing of -none highlighted.</p>
<p>5. Tap the Description tab.</p>	<p>The damage(s) are recorded and the Description tab displays.</p>


Cont. next page



6. Observe the various fields. To make any edits, tap in the field to give it focus, then using the Handheld's on screen keyboard, make any edits required.

NOTE: When making edits you do not have turn on the capitalization with the keyboard. All edits are changed to upper case when you leave the field you are editing.

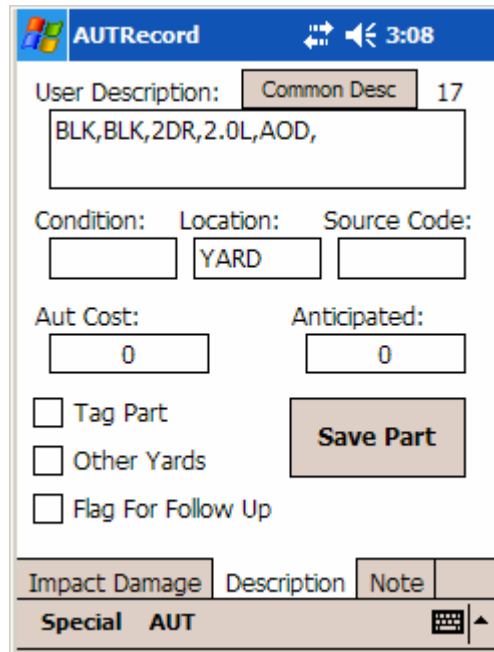


7. After the last edit, click the  icon to toggle off the on screen keyboard.

The on screen keyboard no longer displays.

Cont. next page

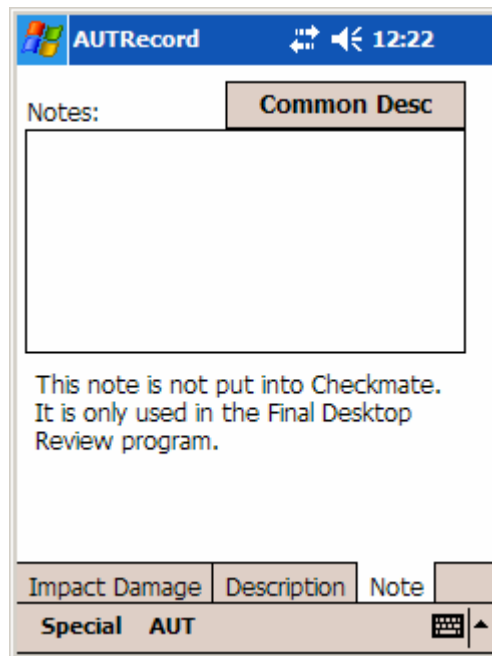
NOTE : When editing the **User Description** field, in addition to typing in edits using the on screen keyboard, you may also select pre-built phrases from within the Common Descriptions screen.



8. If you want to send a note about the AUT record to the Final Desktop Review, tap the **Note** tab.

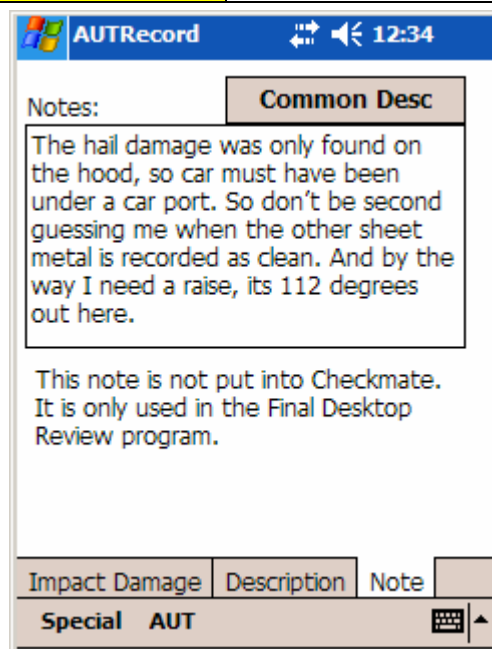
The **Description** tab closes and the **Note** tab displays.

Cont. next page



9. Tap in the Notes field to give it focus, then using the Handheld's on screen keyboard, make any edits required.

NOTE: You may also tap the **Common Desc** button to pull pre-built phrases from there.



10. When you are finished with the note, tap the **Description** tab where you can save.

The **Note** tab closes and the **Description** tab displays.

Cont. next page

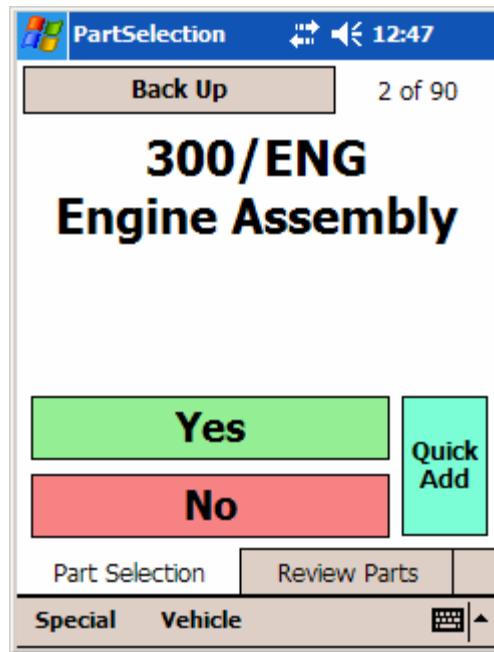
11. Tap the  button.

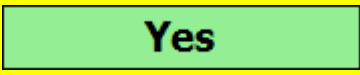
The **AUTRecord** screen closes and the Buddy takes you to the next part type listed on your Dismantler.

Cont. next page

4.4. Inventorying Standard Part Types (example ENG)

Task	Description/Result
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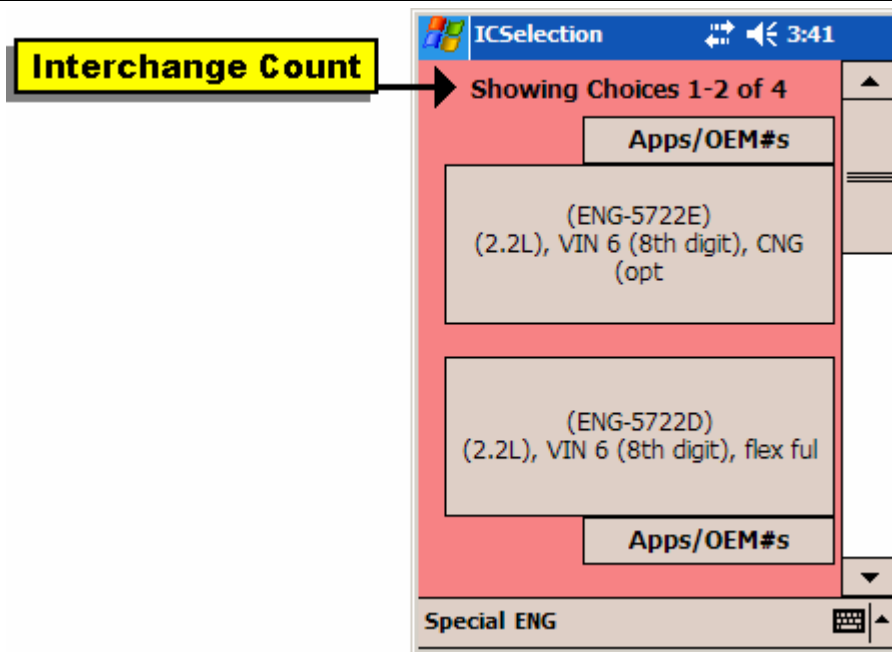


1. Tap  to inventory the displayed part type.

The **PartSelection** screen closes and when multiple interchange choices are available the **ICSelection** screen displays. In the following example there are multiples.

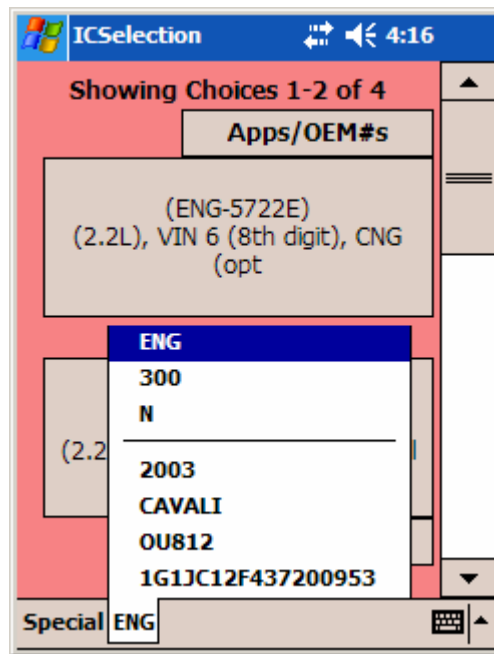
If there is only one interchange option, the **ICSelection** is skipped and depending on how your defaults are configured, **MainDetail** will open to the **Desc, Pricing, ARA** or **Hist** tab.

Cont. next page



<p>2. Observe the number of interchange choices as indicated on the Interchange Count line.</p>	<p>The ICSelection screen will always open showing the first two choices available.</p>
<p>3. Use the scroll bar on the right to move down through the different interchange choices.</p>	<p>Each tap of the scroll bar moves down through the choices one option at a time.</p>
<p>4. If you need to review the VIN number to help you choose the correct interchange, tap the ENG button at the bottom of the screen.</p>	<p>The Vehicle Summary pop-up displays the Year, Model, Stock Number and VIN of the vehicle you are working on.</p>

Cont. next page



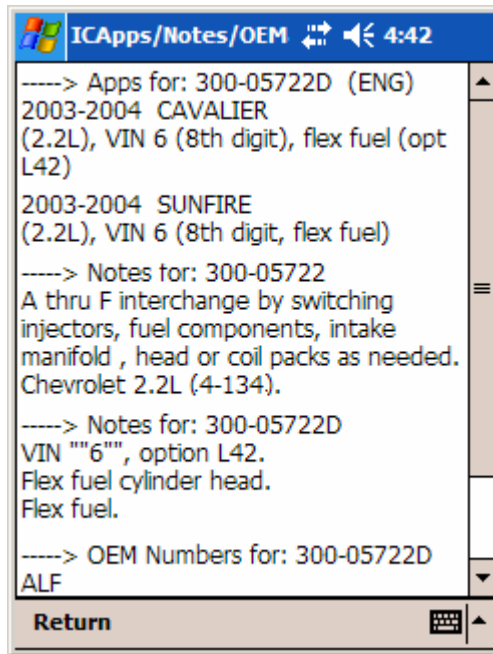
5. After reviewing the Vehicle Summary, tap the **ENG** button again.

The Vehicle Summary pop-up closes.

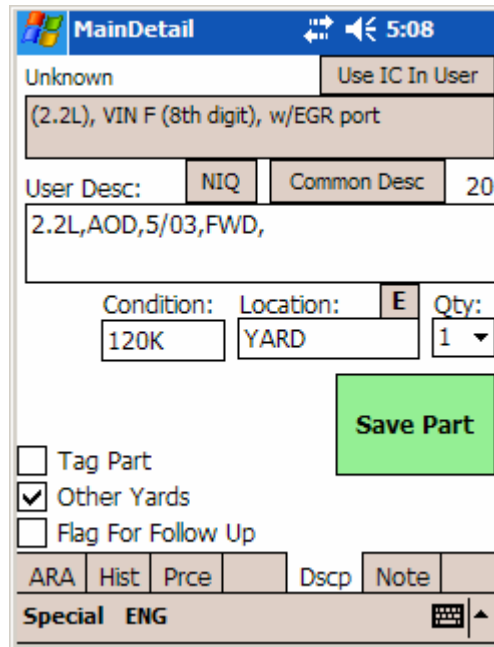
6. If you need to see the Hollander notes or OEM number to help make your interchange choice, tap the **Apps/OEM#s** button that is next to the interchange you would like more information on.

The **ICApps/Notes/OEM** screen displays. It shows the interchange applications, notes and the OEM number information that is available from Hollander. (Hollander will not always have OEM numbers available)

Cont. next page

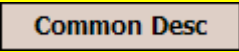


<p>7. After reviewing the Hollander Notes, tap the Return button.</p>	<p>The ICApps/Notes/OEM screen closes and you are returned to the ICSelection screen.</p>
<p>8. When you are ready to make your interchange choice, tap directly on the interchange description.</p> <p>Example: (ENG-5722A) (2.2L), VIN F (8th digit), w/EGR port</p>	<p>The ICSelection screen closes and MainDetail screen opens to the Desc (Description) tab.</p> <p>NOTE: Depending on how your defaults are configured, MainDetail will open to the Desc, Pricing, ARA or Hist tab. For this example the Desc tab is opened.</p>



9. Observe the User Desc field. To make any edits, tap in the field to give it focus, then using the Handheld's on screen keyboard, make any edits required.

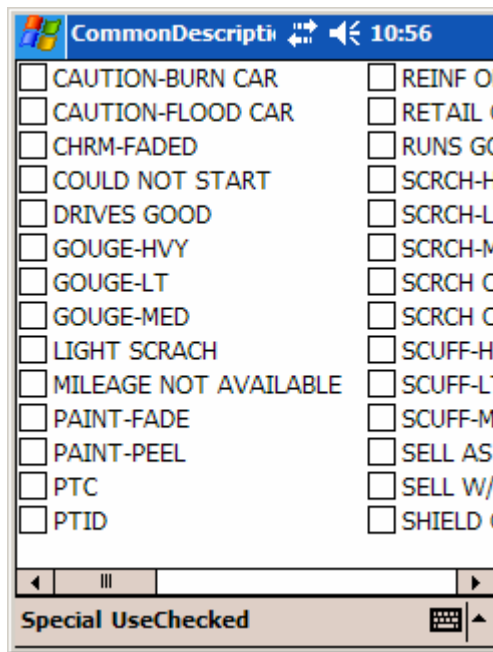
NOTE: When making edits you do not have turn on the capitalization with the keyboard. All edits are changed to upper case when you leave the field you are editing.

10. In addition to typing edits to the User Desc field, you can also pull pre-built phrases from the Common Description list. Tap the  button.

The **CommonDescriptions** screen displays, showing a list of pre-built phrases.

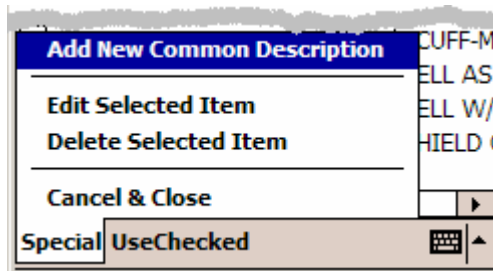
NOTE: Phrases are created and maintained by you, so the list of phrases you see in this guide will be different from the ones on your handheld.

Cont. next page



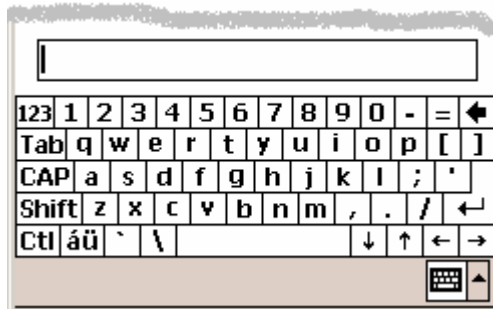
11. If you want to add a new Common Description, tap **Special**.

The Special pop up menu displays.




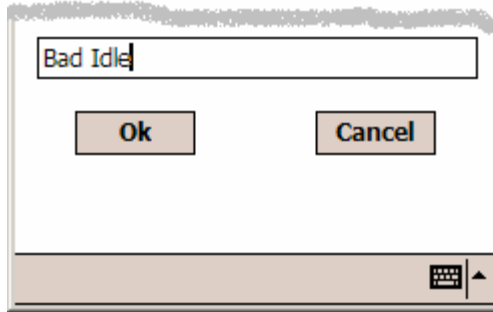
12. Tap **Add New Common Description**.

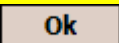
The Special pop up menu closes and the screen opens to a blank field for entering your new common description. The on screen keyboard is activated and the cursor is in the field ready for input.

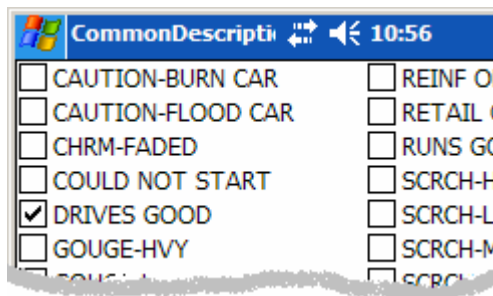


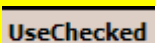
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- | | |
|---|--|
| <p>13. Use the on screen keyboard to type in the new Common Description.</p> | <p>Your entry will automatically be changed to upper case text when you save it.</p> |
| <p>14. After typing your entry, tap  to toggle the on screen keyboard out of your way.</p> | <p>The keyboard closes and the Save and Cancel buttons are revealed.</p> |

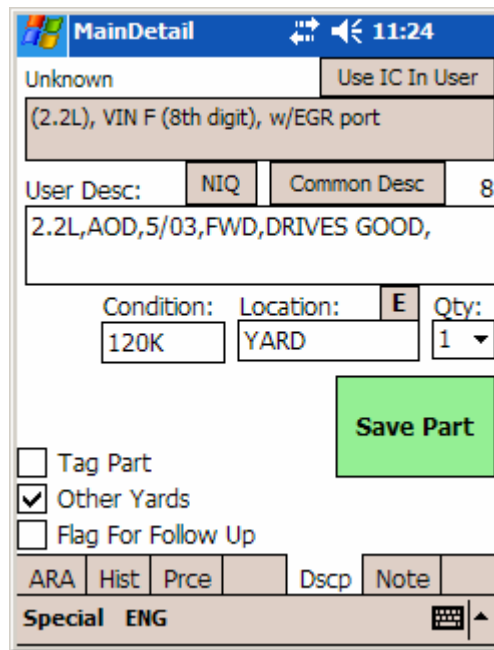


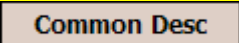


- | | |
|---|---|
| <p>15. Tap the  button.</p> | <p>The screen returns to the CommonDescriptions screen and your entry is added to the list.</p> |
| <p>16. Tap the box to the left of any phrase(s) you want added to the User Desc field back on the Desc tab.</p> | <p>A checkmark displays in the box to the left of each phrase you tapped.</p> <p>NOTE: Phrases are created and maintained by you, so the list of phrases you see in this guide will be different from the ones on your handheld.</p> |



- | | |
|--|---|
| <p>17. Tap  after making your selections.</p> | <p>The CommonDescriptions screen closes and you are returned to the MainDetail window on the Desc tab. The phrase(s) you selected are added to the User Desc field.</p> |
|--|---|

Cont. next page



<p>18. Observe the number to the right of the  button, this tells you how many character spaces are left in the User Desc field before it is full.</p>	<p>The character count limit of this field is dependant on the version of your Inventory Management System.</p>
<p>19. After the last edit, or if the on screen keyboard is in your way, click the  icon at the bottom of the handled to toggle off the on screen keyboard.</p>	<p>The on screen keyboard no longer displays.</p>
<p>20. If the part you are inventorying is not insurance quality and you want to notate that in the User Desc field, click the  button.</p>	<p>NIQ is added to the front of the text in the User Desc field.</p>
<p>21. Observe the Condition field. To make any edits, tap in the field to give it focus, then using the Handheld's on screen keyboard, make any edits required.</p>	<p>If you are using the default settings, this field displays the vehicle Mileage for drive train parts and Units of Damage for sheet metal parts.</p> <p>Mileage comes from the entry you made on the CMPreInventory screen when you first opened the car on the Handheld.</p>
<p>22. Observe the Location field. To make any edits, tap in the field to give it focus, then using the Handheld's on screen keyboard, make any edits required.</p>	<p>Location comes from the entry you made on the CMPreInventory screen when you first opened the car on the Handheld.</p>

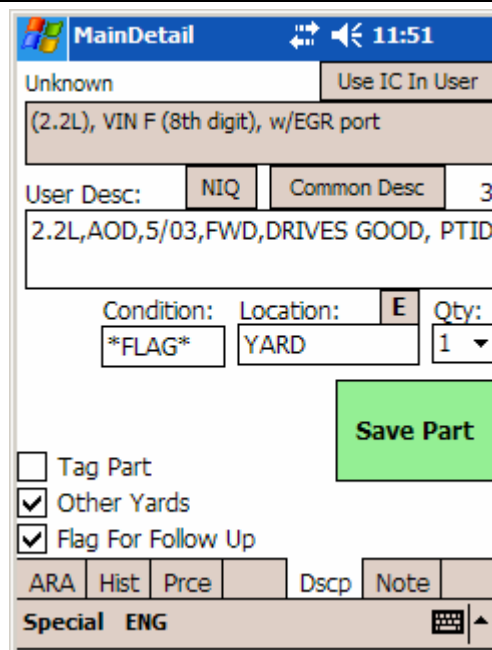
Cont. next page

<p>23. If you want a tag to print for the part you are inventorying, tap the <input type="checkbox"/> Tag Part box. Skip this step to prevent tag printing.</p>	<p>A checkmark displays in the box. After you process this vehicle into your Inventory Management System, a tag record for the part will be in your Tag Que in your Inventory Management System.</p>
<p>24. To keep other yards from seeing this part on lists such as Eden, Carparts and Hotlines, tap the <input checked="" type="checkbox"/> Other Yards box. Skip this step to allow other yards to see this part.</p>	<p>The checkbox is no longer checked and this part will not be fed to inventory sharing sites.</p>
<p>25. To Flag this part for additional follow up, tap the <input type="checkbox"/> Flag For Follow Up box. Skip this step if no follow up is required.</p>	<p>A checkmark displays in the box. The Condition field changes to display *FLAG*. This is designed to catch the counter person's attention so they know that additional research is needed before this part can be sold. In addition, this part will be highlighted in Final Desktop Review (FDR) and listed in the FDR's Flag for Follow Up report.</p>

NOTE : The Flag for Follow Up option is often used for two scenarios:

When you can't tell if part is good until its pulled, in which case many yards will put PTC (Pull To Check) in the **User Desc** field.

When you are unsure of the exact interchange but still want the part to be listed in your inventory, in which case many yards will put PTID (Pull To Identify) in the **User Desc** field.



The screenshot shows the 'MainDetail' application interface. At the top, it displays 'Unknown' and 'Use IC In User'. Below that is a description '(2.2L), VIN F (8th digit), w/EGR port'. The 'User Desc' field contains 'NIQ' and 'Common Desc' with a value of '3'. The main description is '2.2L,AOD,5/03,FWD,DRIVES GOOD, PTID'. The 'Condition' field is set to '*FLAG*', 'Location' is 'YARD', and 'Qty' is '1'. A green 'Save Part' button is visible. At the bottom, there are three checkboxes: 'Tag Part' (unchecked), 'Other Yards' (checked), and 'Flag For Follow Up' (checked). Below the checkboxes are fields for 'ARA', 'Hist', 'Prce', 'Dscp', and 'Note'. The 'Special' field is set to 'ENG'.

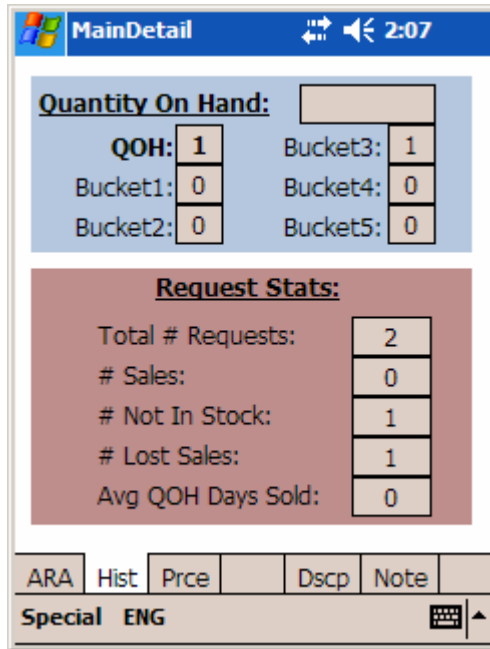
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26. If you wish to observe Sales History and Quantity on Hand information for the part you are currently working on, click the

Hist tab.

The **Hist** tab displays.

NOTE: If you are inventorying a deatable part in poor shape, sometimes it is useful to check if you have any in stock already and what kind of calls or sales have taken place for the interchange you are working with. The history tab gives you this information.



NOTE 1 : The **Quantity On Hand** field displays the number of parts you already have in stock for the interchange you are currently inventorying and in which Buckets they reside. In addition, a suggestion to SCRAP, KEEP, etc, will be displayed in the top right box when available.

NOTE 2 : The **Request Stats** field displays the following information:

Total # of Requests – number of times the interchange has been looked up.

Sales – number of sales of this interchange.

Not In Stock – number of times the interchange was looked up when not in stock.

Lost Sales – number of times the interchange was looked up while in stock, but no sale occurred.

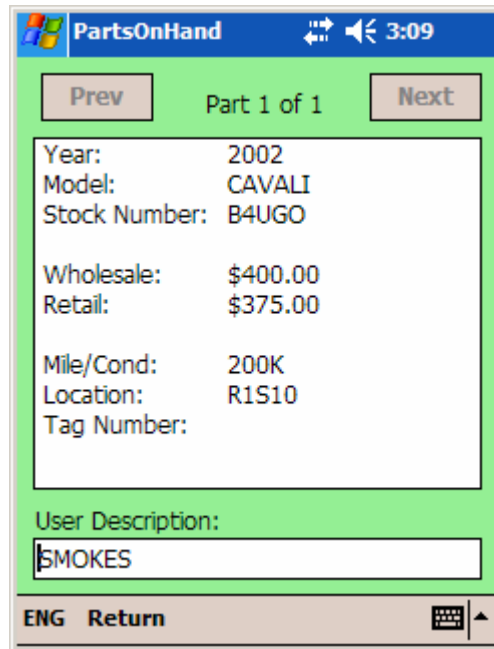
Avg QOH Days Sold – average number of days the part sat in stock before it was sold.

27. If you would like to see the details of the parts you already have in stock, tap on the QOH number itself, **QOH: 1**

The **PartsOnHand** screen displays.

NOTE: A Loose Parts database must be loaded in order for this feature to function.

Cont. next page



NOTE : If you have multiple items on hand, you can use **Prev** or **Next** to scroll through the different ones. If you only have one in stock, the buttons are grayed out as in the example above.

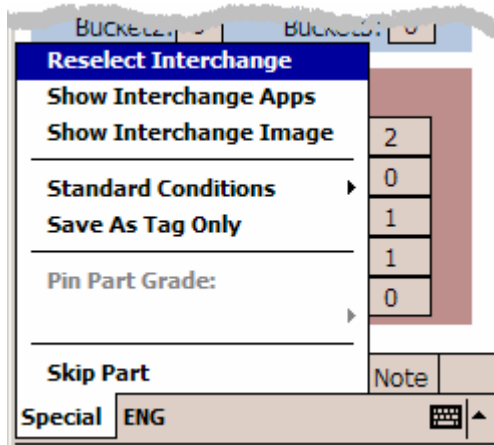
28. Click **Return** when you are finished reviewing the details of your QOH.

The **PartsOnHand** screen closes and you are returned to the **Hist** tab.

NOTE : If you decide not to inventory this part follow steps 29 - 30, otherwise skip to step 31.

29. If after looking at the History and QOH information you decide Not to inventory this part, click **Special**.

The Special pop-up menu displays.

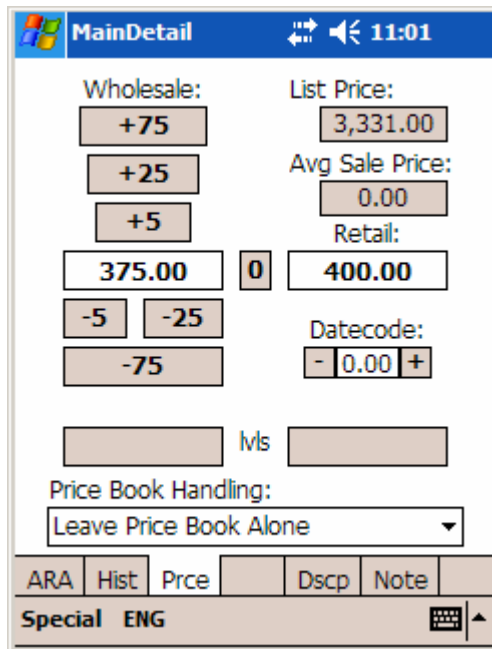


30. Tap **Skip Part**,

You are returned to the **PartSelection** screen with the Yes/No buttons where you can tap No, this time.

31. To review or edit Pricing tap the **Price** tab.

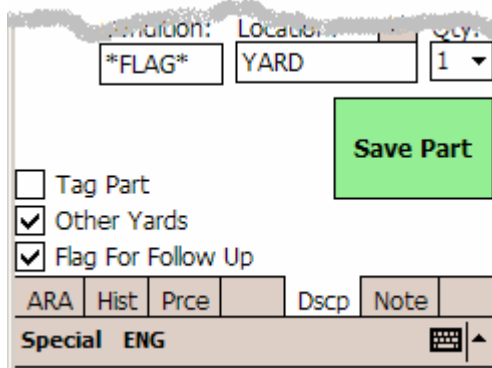
The Pricing tab displays. If there is a Standard Price set for the interchange you are inventorying, the part is automatically pre priced.



NOTE : Although you can adjust pricing with this tab, **Final Desktop Review** has more tools to help you with pricing decisions. For more information see chapter 5. Final Desktop Review.

32. After making any edits on any of the tabs and you are ready to save the part, tap the **Dscp** tab.

The Description tab displays where you can save the part.



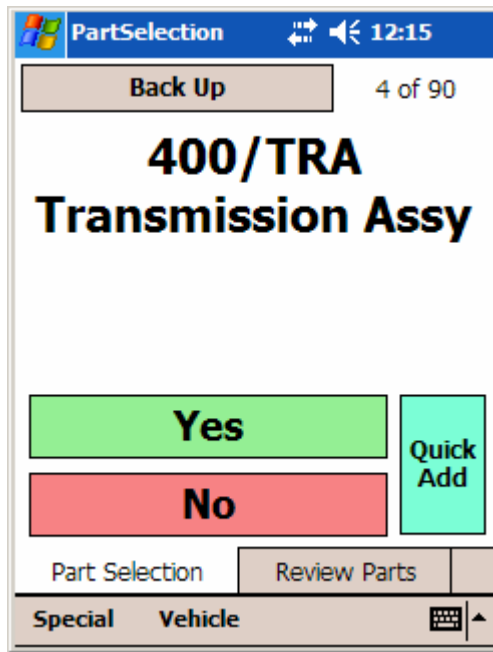
33. Tap the **Save Part** button.

The part is saved. The **MainDetail** screen closes and you are returned to the **PartSelection** screen displaying the Yes/No buttons for the next part from your dismantler report.

Cont. next page

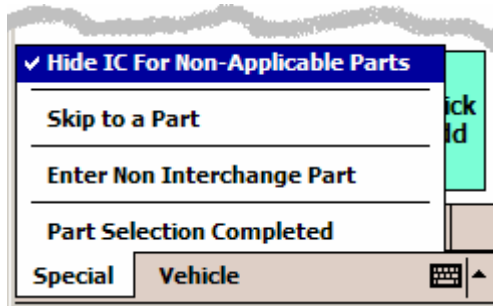
4.5. Skip to a Specific Part Type

Task	Description/Result
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1. To skip to a part, rather than tapping the **No** button continuously, tap **Special**

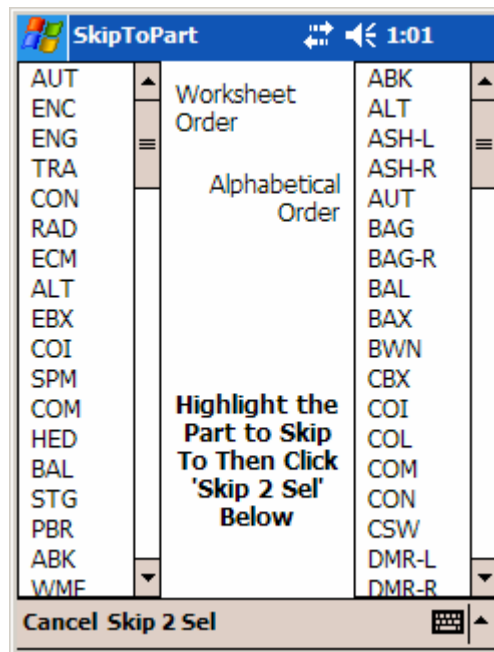
The Special pop-up menu displays.



2. Tap **Skip to a Part**

The **PartSelection** screen closes and the **SkipToPart** screen displays.

Cont. next page

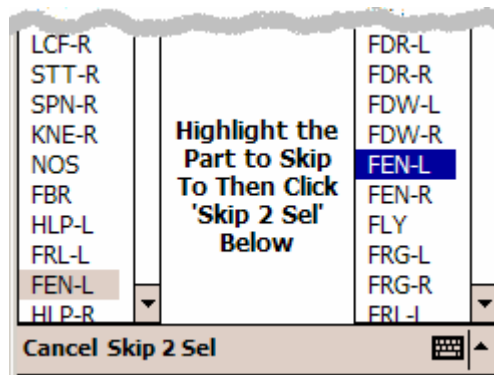


There are two scrollable lists on the **SkipToPart** screen. They both have the same part types listed, but they are each sorted differently, allowing you to choose the sort that will help you find your part type quickest. The list on the left side is sorted in the same order as your dismantler report. The list on the right side is sorted alphabetically.

3. Using your stylus, tap on either scroll bar handle and drag the list until you see the part type you want.

4. Tap the part type. Example:

The part type highlights in blue. The other list automatically scrolls to the same part and highlights in gray.



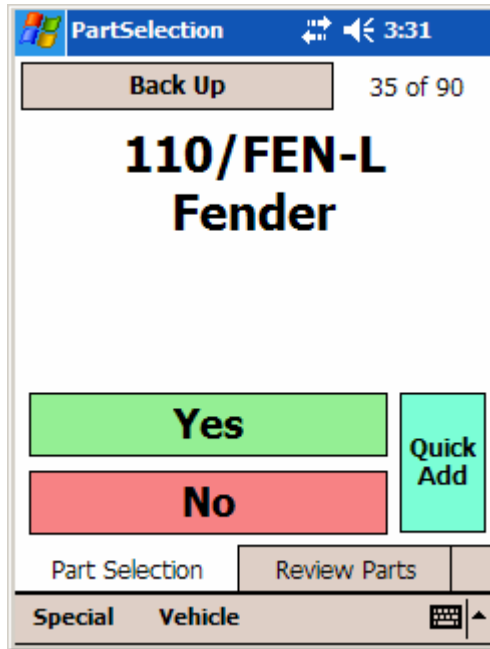
5. Tap .

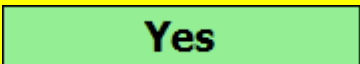
The **SkipToPart** screen closes and the **PartSelection** screen displays the part type you selected.

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4.6. Inventorying Parts with ARA Damage Codes (example FEN)

Task	Description/Result
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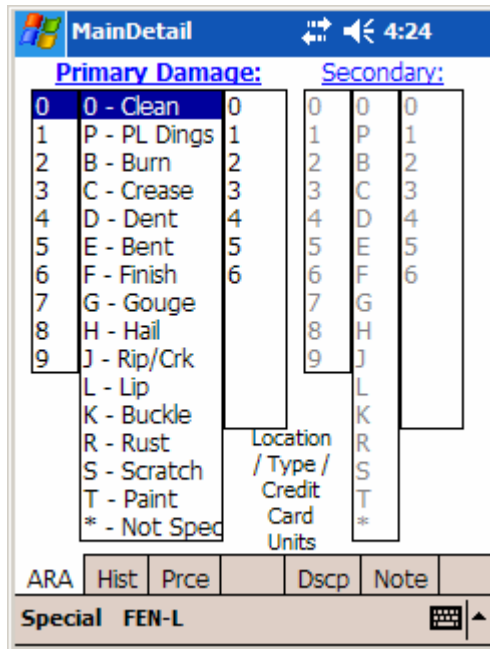
1. Tap  to inventory the displayed part type.

The **PartSelection** screen closes and the **MainDetail** screen opens, displaying the **ARA** tab.

If there are multiple interchanges for this part type you are first taken to the screen for selecting the interchange. In this example there is only one.

For more information on selecting interchanges see section 4.4 *Inventorying Standard Part Types (example ENG)* step 2.

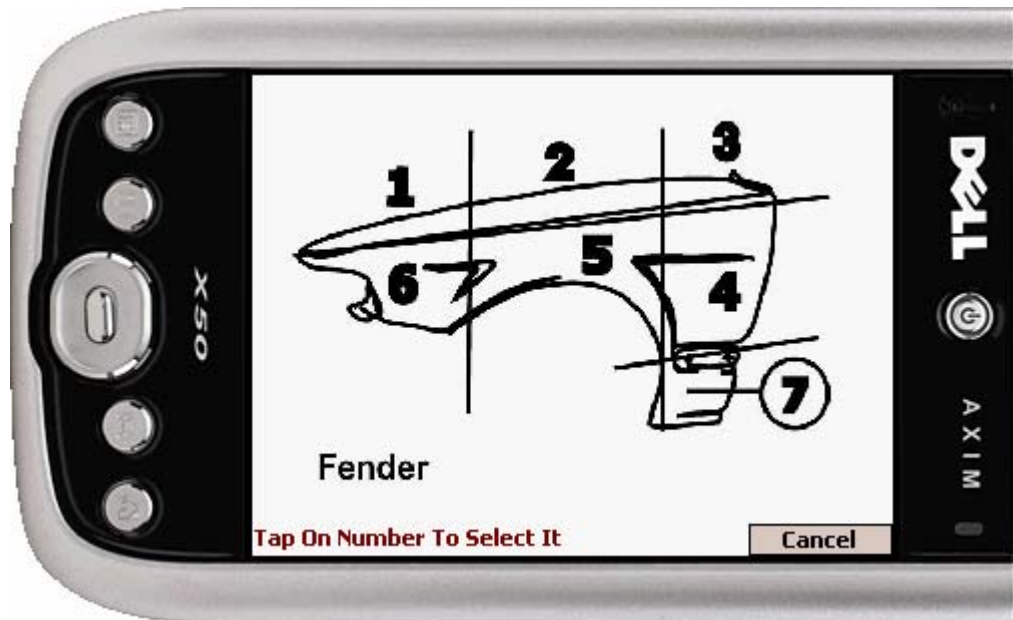
Cont. next page



2. Tap the words Primary Damage:

The handheld displays the ARA Location Selection diagram for the part type you are inventorying,

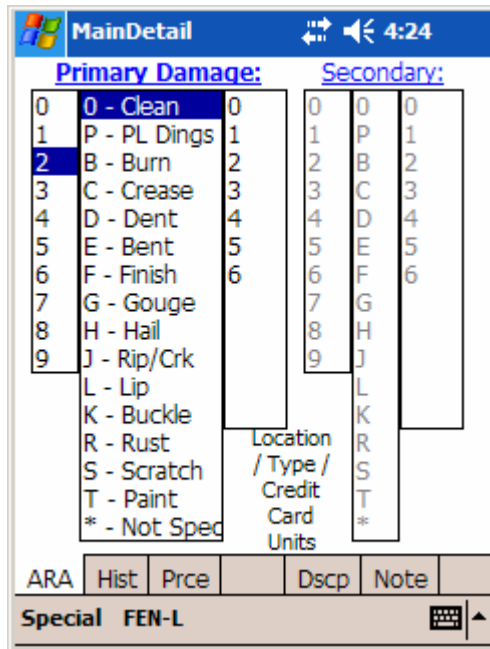
NOTE: If you don't need the diagram to know the location number, you can tap directly on the number in the first column under the Primary Damage panel.



3. Tap any area to indicate where the primary damage is located.

The diagram closes and you are returned to the ARA tab. The first column under Primary Damage reflects the location you tapped.

Cont. next page

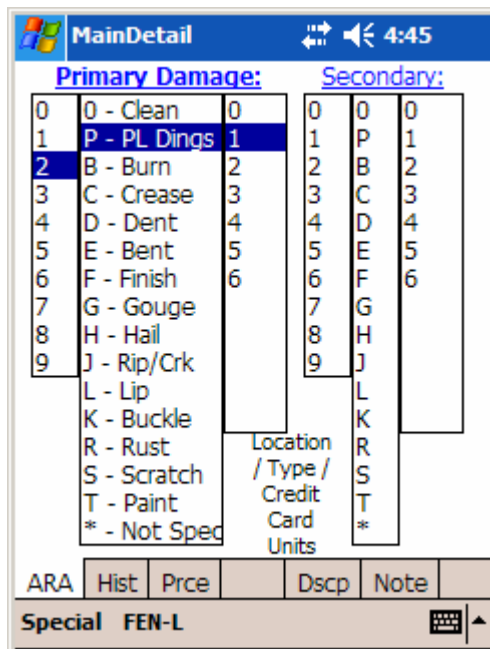


4. In the second column, tap the damage type.
Example: P - PL Dings (Parking Lot Dings)


Your selection is highlighted.

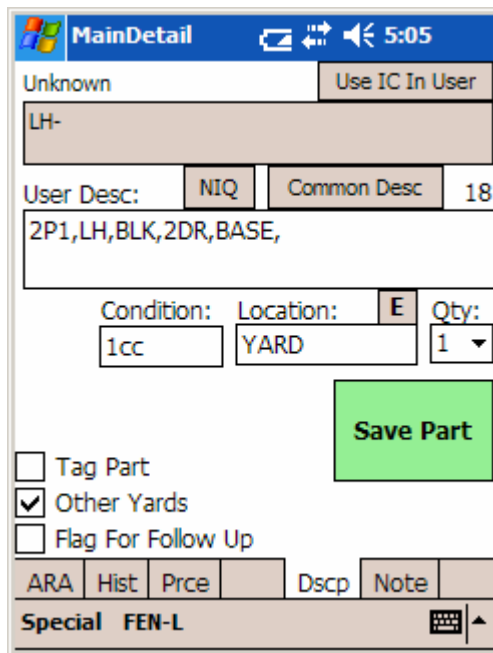
5. In the third column tap the number to indicate the amount of damage.
Example: 1 credit card unit

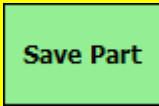
Your selection is highlighted and the Secondary Damage panel is activated.



Cont. next page

<p>6. If you want to record Secondary Damage repeat steps 2 - 5 but tap on the words Secondary: to start and use its columns. If there is no Secondary Damage, skip this step.</p>	<p>After tapping on the third column to indicate amount of damage, the ARA tab closes and you are taken to the Dscp tab.</p>
<p>7. If you don't need to record Secondary Damage, tap the  tab.</p>	<p>The Dscp tab displays and your ARA code(s) are displayed in the User Desc field and the amount of damage is echoed in the Cond field.</p>



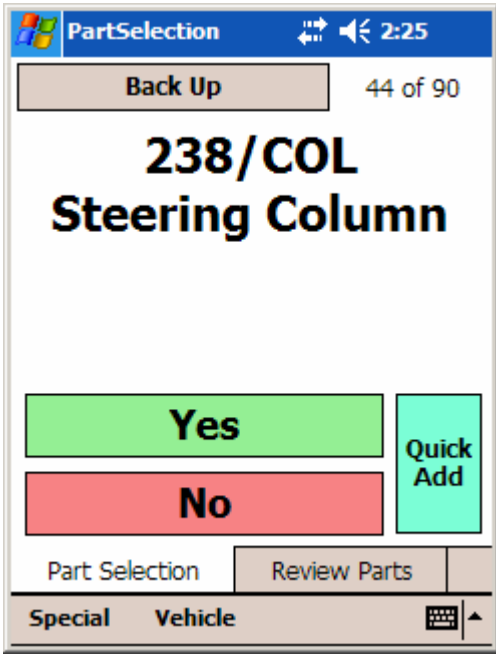
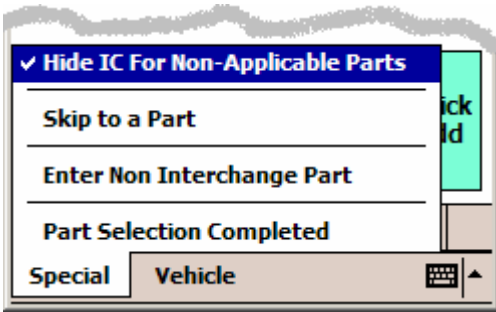
<p>8. Edit or Review the other tabs as needed then tap the  button.</p>	<p>The part is saved. The MainDetail screen closes and you are returned to the PartSelection screen displaying the Yes/No buttons for the next part from your dismantler report.</p>
<p>9. Continue to inventory each part as you work down the list from your dismantler report.</p>	

Cont. next page

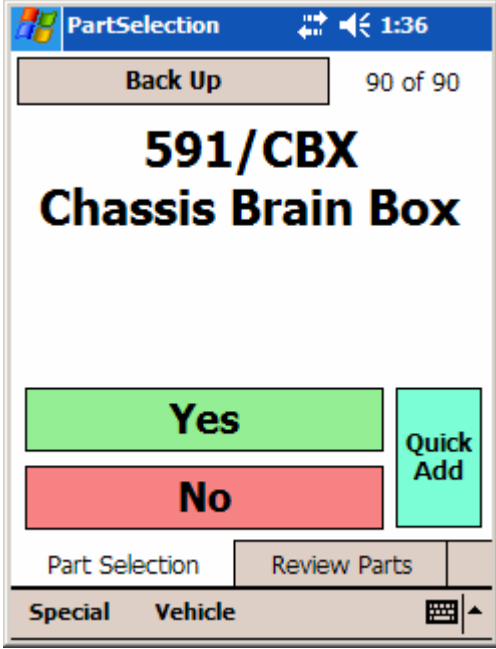
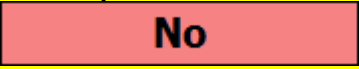
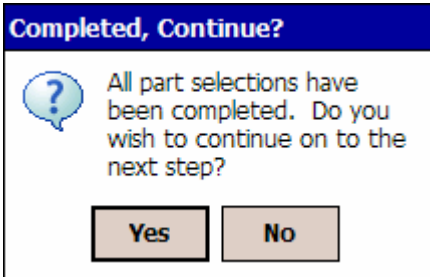
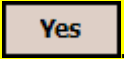
4.7. Sending the Vehicle to Final Desktop Review (FDR)

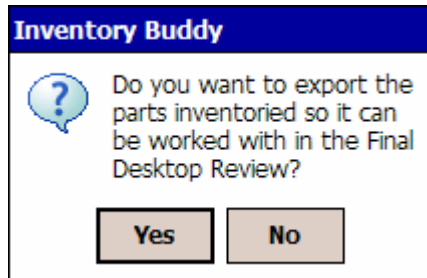
After you answer the Yes/No button question on the last part from you Dismantler Report, the Buddy will ask if you want to go the next step. You can also invoke this process at any time without having to wait until you are on the last part. This section of the guide shows both methods.

4.7.1. Send to FDR from Any Part

Task	Description/Result
	
<p>1. Tap Special</p>	<p>The Special pop-up menu displays.</p>
	
<p>2. Tap Part Selection Completed</p>	<p>The pop-up menu closes and the Inventory Buddy message box displays. From this point on the procedure is the same as step 3 onward in the following section, <i>Send to FDR after Last Part</i>.</p>
	<p style="text-align: right;">Cont. next page</p>

4.7.2. Send to FDR after Last Part

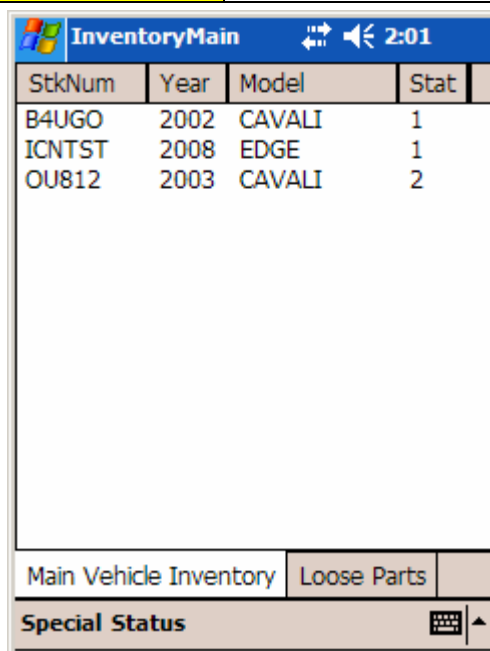
Task	Description/Result
	
<p>1. When on the last part answer the Yes/No button question. For this example tap</p> 	<p>The Completed, Continue? question box displays. If you had chosen the Yes button instead, this box would display after you saved the part.</p>
	
<p>2. Tap</p> 	<p>The question box closes and a new question box displays.</p> <p style="text-align: right;">Cont. next page</p>



3. Tap

The question box closes and after a brief pause, you are returned to the **InventoryMain** screen. The vehicle now shows a status 2 (Ready for Final Desktop Review)

If you had answered No, the same actions would occur, but the status of the vehicle would remain at status 1 (Ready to Select Parts), allowing you to re-open the vehicle at any time to finish it.



StkNum	Year	Model	Stat
B4UGO	2002	CAVALI	1
ICNTST	2008	EDGE	1
OU812	2003	CAVALI	2

Main Vehicle Inventory Loose Parts

Special Status

4. You can now move on to another vehicle and inventory it, or you can cradle or cable the handheld and allow it to sync.

After syncing with your PC the vehicle is available in the **Final Desktop Review** program.

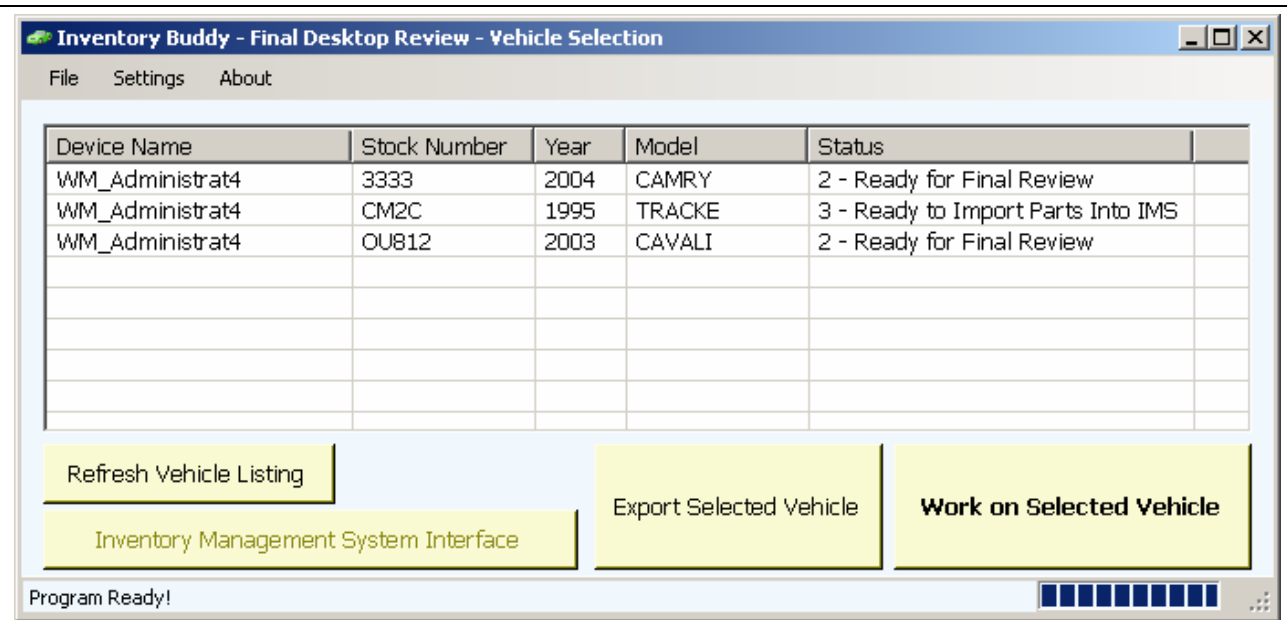
This section complete.

5. Final Desktop Review

After you have completed your vehicle(s) on the Buddy handheld, and you have cradled or cabled your handheld, the PC will sync with the handheld and any vehicles in status 2 or greater will be available in Final Desktop Review (FDR). FDR is run from your PC. It allows you to review, edit and price the parts you inventoried and finally to mark it for export into your Inventory Management System.


5.1. Processing in FDR

Task	Description/Result
<p>1. On your PC desktop, click the green</p>  <p>Inventory Buddy icon:</p>	<p>The Inventory Buddy main button panel displays.</p>
	
<p>2. Click</p> 	<p>The button panel closes and the Final Desktop Review – Vehicle Selection window displays.</p> <p style="text-align: right;">Cont. next page</p>



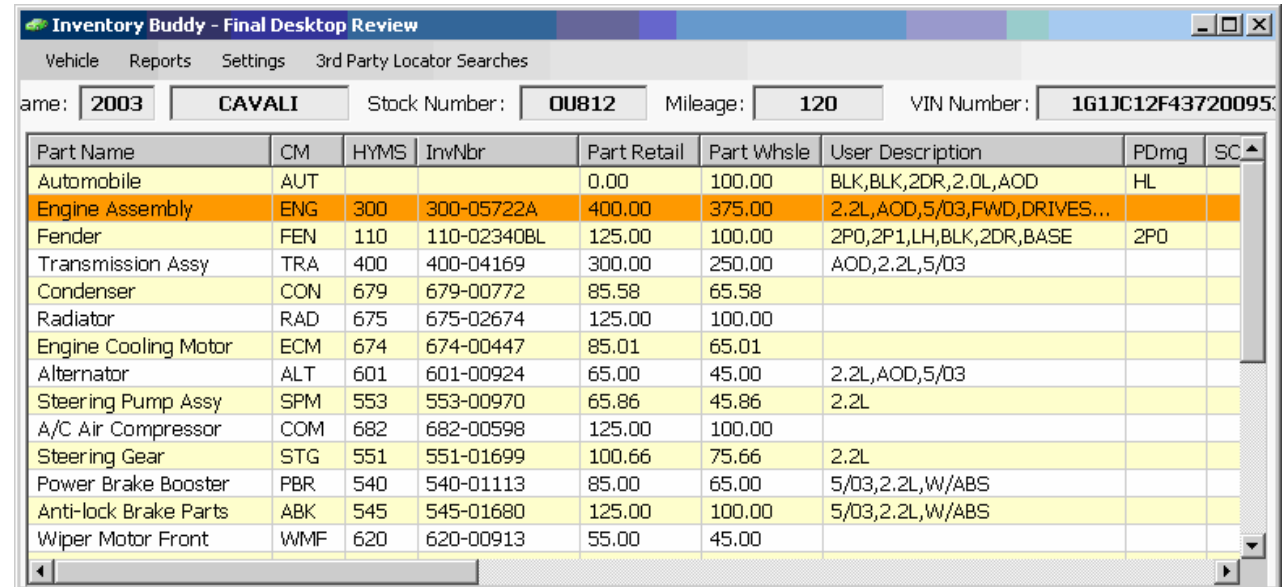
3. Click anywhere on the row of the car you want to work with.

The row highlights and the vehicle is selected.

4. Click 

The **Vehicle Selection** window closes and the **Final Desktop Review** window opens to the part list for the vehicle you selected.

You can also open a vehicle by double-clicking it.



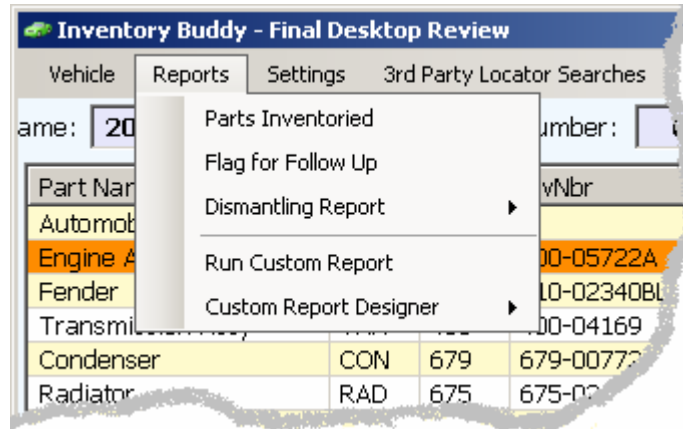
This view lists all parts inventoried. In the example above the orange stripe indicates the Engine was inventoried with the Flag For Follow Up option checked. A report is available for Flag For Follow Up parts.

Cont. next page

5. If you would like to see the **Flag For Follow Up** report, click the **Reports** menu.

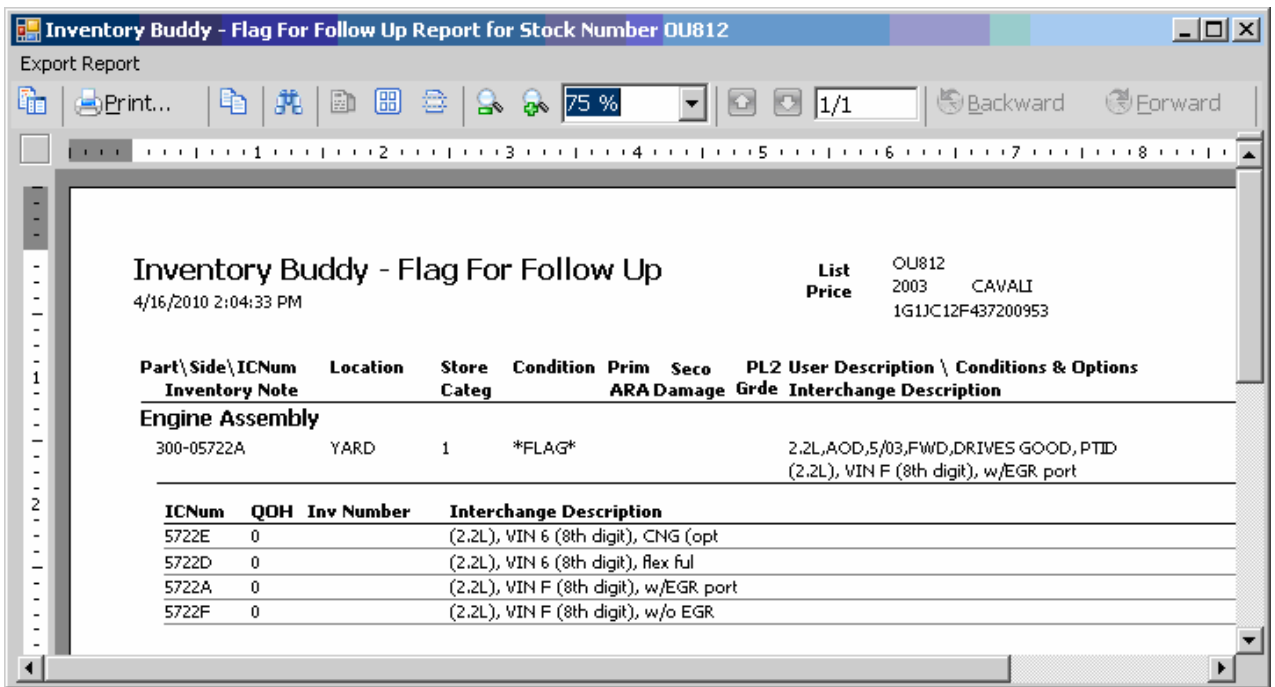
The report menu displays.

There are many reports available, this guide describes the Follow Up report.



6. Click **Flag for Follow Up**.

After a brief pause, the report displays in a new window.




For each part that was flagged, The Flag For Follow Up report shows the interchange you chose when you inventoried the part, and also all the other available interchanges. Many yards print this report and give it to their dismantler personnel. The dismantlers are asked to determine the correct interchange when the part is pulled and to circle the correct interchange and return the report to the Inventory Manager so the Inventory record can be corrected if needed.

7. To print the report, click **Print...**

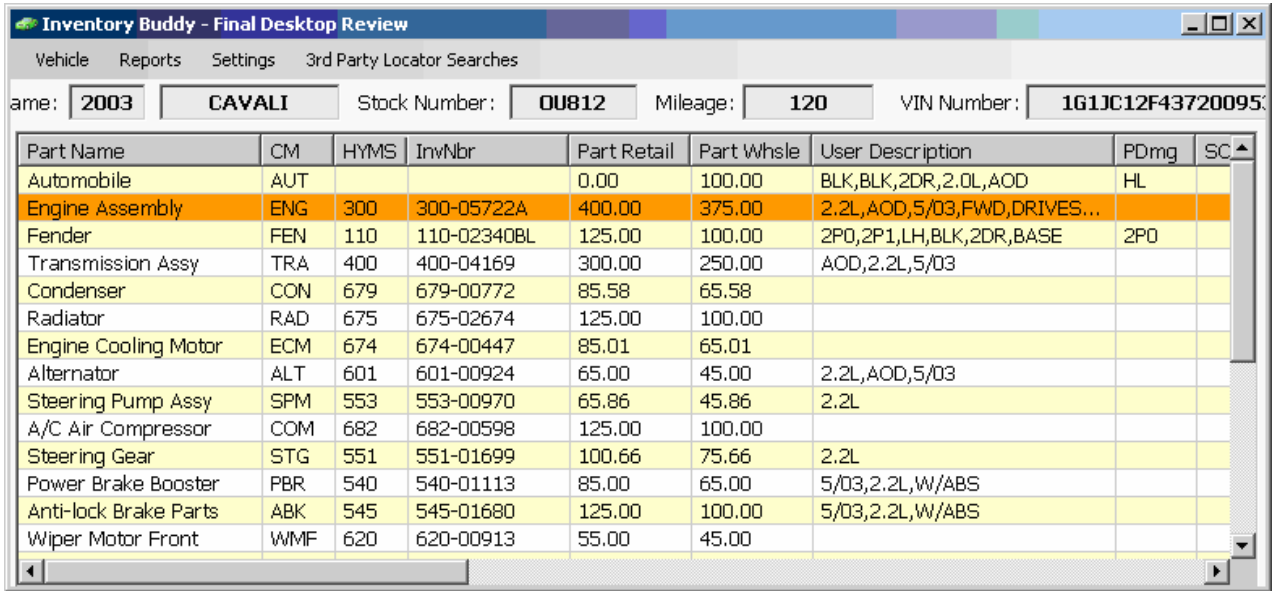
A standard Windows Print dialog displays where you can finalize print details.

Cont. next page

NOTE: In addition to printing, any of the FDR reports can be exported as well. Export options include Acrobat, Text, HTML, Excel and more. To Export reports click the **Export Report** menu at the top left of the window and choose the export option you want. A standard Windows Save dialog ensues.

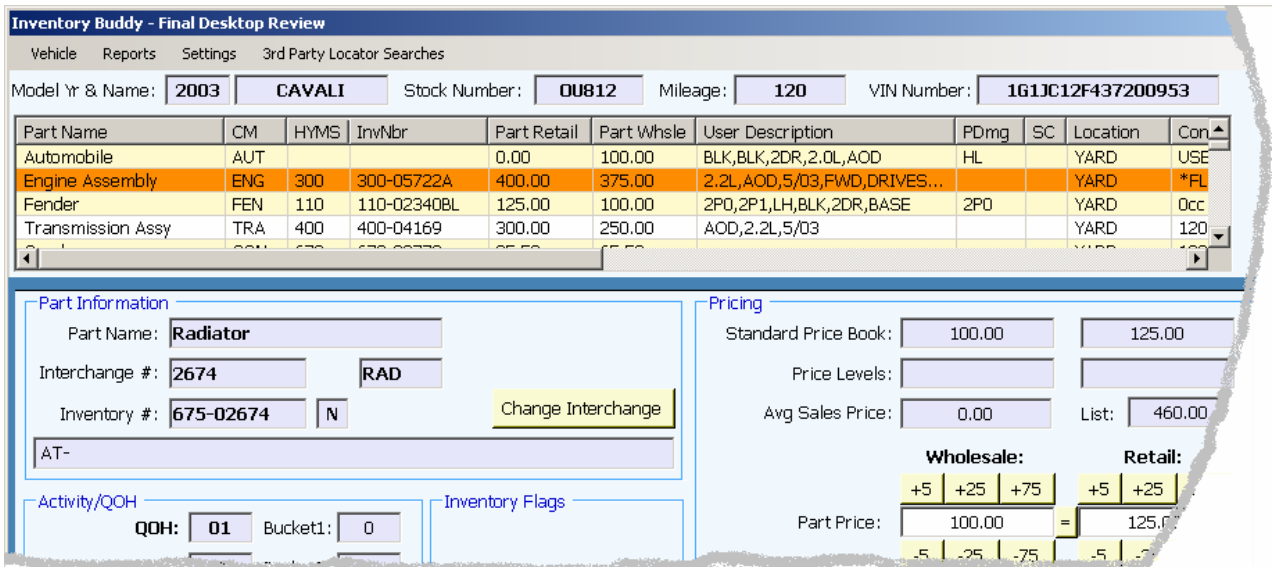
8. To close the report window, click the  at the top right corner,

The report window closes and FDR regains focus.



9. Double-Click a part row to see the detail on the part. Example:

The part list closes and two sections display. The top section is a scrollable list of all parts. The bottom section shows the detail for the double-clicked part.



10. Observe the Part Information panel in the bottom section.

Cont. next page

Part Information

Part Name: Radiator

Interchange #: 2674 RAD

Inventory #: 675-02674 N

Change Interchange

AT-

11. If you see the part was inventoried with the wrong interchange click the **Change Interchange** button. Otherwise, skip to task 13.

The Change Interchange window displays. It lists all interchanges available for the part type. The current interchange is highlighted.

Change Interchange

Radiator

IC Number	Interchange
2674	AT-
2673	MT-

OK Cancel

12. Click on the interchange row that you want to change to.

The Change Interchange window closes and the bottom section of the FDR window is updated with data from the new selection.

13. Observe the Activity/QOH and Inventory Flags panels.

The **Activity/QOH** panel displays the same type of information that is available on the **Hist** tab on the handheld.

The **Inventory Flags** panel gives you the ability to change any flag settings you may have set while on the working with this part on the handheld.

Cont. next page



Activity/QOH		Inventory Flags	
QOH:	<input type="text" value="01"/>	Bucket1:	<input type="text" value="0"/>
Requests:	<input type="text" value="0"/>	Bucket2:	<input type="text" value="1"/>
Sales:	<input type="text" value="0"/>	Bucket3:	<input type="text" value="0"/>
Not In Stock:	<input type="text" value="0"/>	Bucket4:	<input type="text" value="0"/>
Lost Sales:	<input type="text" value="0"/>	Bucket5:	<input type="text" value="0"/>
Avg Days QOH Sold:		<input type="text" value="196"/>	
Quantity To Inventory:		<input type="text" value="1"/>	
Other Yards Can See: <input checked="" type="checkbox"/>			
Tag Part: <input type="checkbox"/>			
Flag For Follow Up: <input type="checkbox"/>			
Print Tag Only (Do Not Inventory): <input type="checkbox"/>			

14. If you decide you do not want to inventory this part, click the down arrow

Quantity To Inventory: to change the "1" to "0". Otherwise skip this step.

When the Quantity to Inventory field is change to a "0" (zero), this part will not be processed into your IMS. When the FDR part list is viewed , this part row will be displayed in red and the User Description field will read, "Quantity = 0 (Deleted)".

15. If you want to change any of the Flag settings, click in the check box to toggle the checkmark On or Off.

16. Observe the Description panel.

This panel displays the User Description and any Notes you may have entered for the part.

You can edit either field. The Inventory Notes are not passed to Checkmate, it is there only so the inventory person can send a note to the FDR person.

Description	
User Description:	<input type="text" value="2.2L,AOD,5/03,FWD"/>
Inventory Notes: (NOT Passed To Ckmt or Pinn Systems)	<input type="text" value="This is metal, I thought OE used plastic?"/>

17. Make any edits needed to the User Description field.

The information in the User Description is passed to the Description field in Checkmate when you process this vehicle.

Cont. next page

18. Observe the Pricing panel.

The **Pricing** panel displays the prices you have set in your Standard Price Book (if any).

The **Price Levels** fields display any text you entered in your Checkmate Standard Price Book for the selected interchange.

Pricing

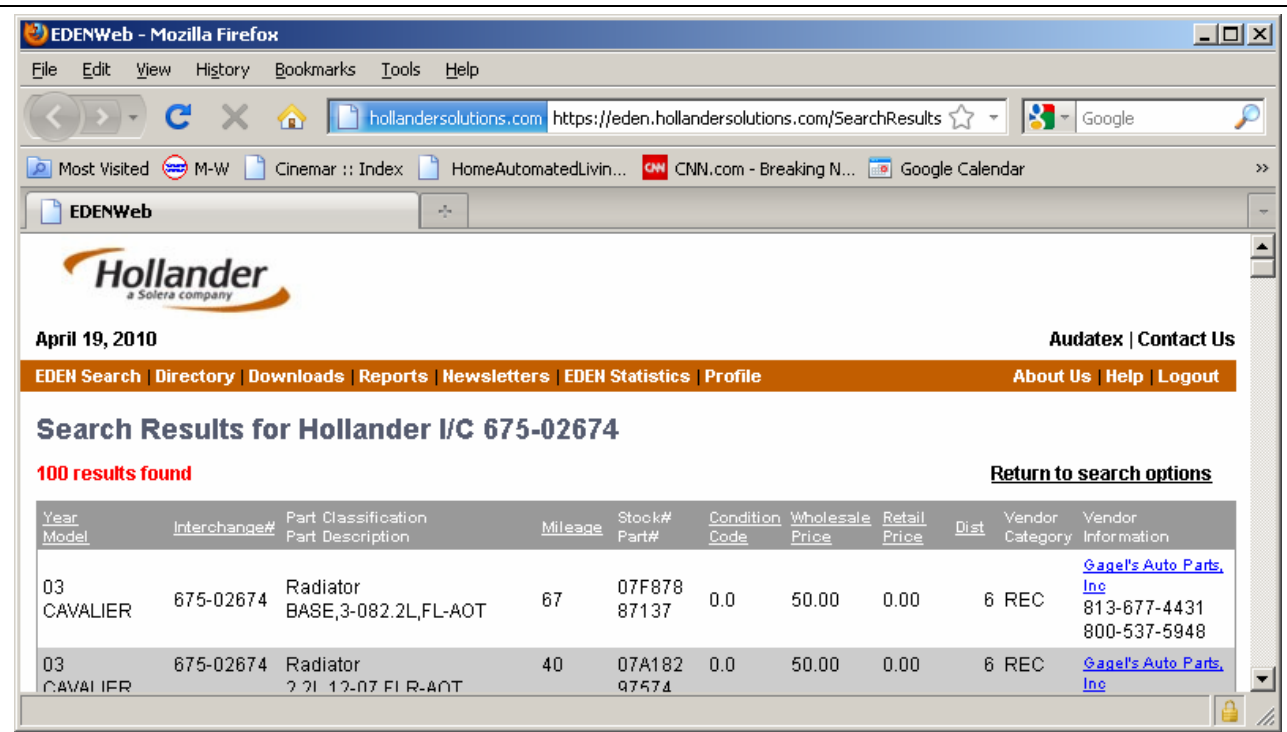
Standard Price Book:	100.00	125.00
Price Levels:		
Avg Sales Price:	0.00	List: 460.00
Wholesale:		Retail:
+5 +25 +75		+5 +25 +75
Part Price:	100.00 =	125.00
-5 -25 -75		-5 -25 -75
Price Book Update:	Leave Stnd Price Book & QOH Alone	
	Datecode:	0.00

19. If you would like to check pricing against other yards, click the or button.

The interchange you are currently working on is passed to the online part search for the button you pressed. After a brief time, the results of the search are displayed in your Web Browser window.

NOTE: If you are not an EDEN member, the EDEN search button is disabled. Hotlines searches do not require membership.

Cont. next page



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a Solera company

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Search Results for Hollander I/C 675-02674

100 results found [Return to search options](#)

Year Model	Interchange#	Part Classification Part Description	Mileage	Stock# Part#	Condition Code	Wholesale Price	Retail Price	Dist	Vendor Category	Vendor Information
03 CAVALIER	675-02674	Radiator BASE,3-082.2L,FL-AOT	67	07F878 87137	0.0	50.00	0.00	6 REC		Gagel's Auto Parts, Inc 813-677-4431 800-537-5948
03 CAVALIER	675-02674	Radiator 2.2L 12-07 FL R-AOT	40	07A182 97574	0.0	50.00	0.00	6 REC		Gagel's Auto Parts, Inc

The EDEN results show you other yards in your area that have the same interchange in stock. You can review their pricing to help you get an idea of how to price your part.

NOTE: You can sort the results by clicking on a column header once to sort ascending, or a second time to sort descending. Example: Clicking the Wholesale Price column header twice will get all priced listings up to the top of the screen.

20. When you are finished reviewing the EDEN results, minimize or close the web browser.

Final Desktop Review regains focus, where you can adjust pricing as needed.

Cont. next page

Pricing

Standard Price Book:

Price Levels:

Avg Sales Price: List:

Wholesale:

Retail:

Part Price: =

Price Book Update:

Datecode:

21. To adjust pricing, click the plus or minus quick change buttons under Wholesale or Retail as needed.

+5	+25	+75
100.00		
-5	-25	-75

Alternatively, you can select the dollar amount in the field and type in any price you wish.

Click if you want the Retail price to equal the Wholesale price.

22. Observe the field labeled:

Price Book Update:

There are four possible selections:

Leave Stnd Price Book & QOH Alone

Applies the price you set to this part and nothing else.

Update Stnd Price Book & QOH

Applies the price you set to this part, the Standard Price Book, AND any parts you have in stock with this interchange.

Update Stnd Price Book Only

Applies the price you set to this part and updates the Standard Price Book.

Add to Stnd Price Book if Not On File

Applies the price you set to this part and updates the Standard Price Book.

Cont. next page

23. If you want to select a different Price Book Update option, click the drop down arrow at the end of the field and select one of the options described above.

When the vehicle is processed back into Checkmate, the selection made here is implemented.

24. if your yard uses the cents of a price to indicate "when added" or "last price change" click the up or down arrows on the Datecode: 0.00 field.

The cents indicated in the **DateCode** field are applied to the **Part Price** fields.

Pricing

Standard Price Book:	100.00	125.00
Price Levels:		
Avg Sales Price:	0.00	List: 460.00
Wholesale:		Retail:
+5 +25 +75		+5 +25 +75
Part Price:	100.04	= 125.04
-5 -25 -75		-5 -25 -75
Price Book Update:	Leave Stnd Price Book & QOH Alone	
Datecode:	0.04	

25. Check the Condition/Location panel.

The fields in this panel reflect the entries you made on the handheld. To edit a field click in it, then use the on screen keyboard.

Condition/Location

Prim/Secon Damage:		
Condition:	120K	
Location:	YARD	

26. When you are satisfied with all the data for the current part, click

Your edits are saved, and the bottom panel changes to the next inventoried part.

Cont. next page



27. Repeat the above steps for each part you want to edit. When you reach the end of the part list, click .

The detail screen closes and you are returned to the part list.


Part Name	CM	HYMS	InvNbr	Part Retail	Part Whsle	User Description	PDmg	SC
Automobile	AUT			0.00	100.00	BLK,BLK,2DR,2.0L,AOD	HL	
Engine Assembly	ENG	300	300-05722A	400.00	375.00	2.2L,AOD,5/03,FWD,DRIVES...		
Fender	FEN	110	110-02340BL	125.00	100.00	2P0,2P1,LH,BLK,2DR,BASE	2P0	
Transmission Assy	TRA	400	400-04169	300.00	250.00	AOD,2.2L,5/03		
Condenser	CON	679	679-00772	85.58	65.58			
Radiator	RAD	675	675-02674	125.00	100.00			
Engine Cooling Motor	ECM	674	674-00447	85.01	65.01			
Alternator	ALT	601	601-00924	65.00	45.00	2.2L,AOD,5/03		
Steering Pump Assy	SPM	553	553-00970	65.86	45.86	2.2L		
A/C Air Compressor	COM	682	682-00598	125.00	100.00			
Steering Gear	STG	551	551-01699	100.66	75.66	2.2L		
Power Brake Booster	PBR	540	540-01113	85.00	65.00	5/03,2.2L,W/ABS		
Anti-lock Brake Parts	ABK	545	545-01680	125.00	100.00	5/03,2.2L,W/ABS		
Wiper Motor Front	WMF	620	620-00913	55.00	45.00			

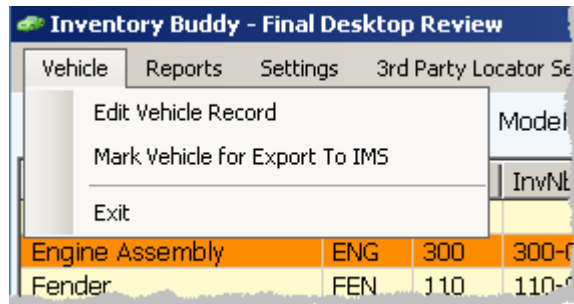
28. If you need to make any edits to the Common Option Codes that were entered on the handheld, go to step 1 in the following section.

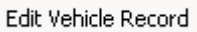
If no further editing is needed, perform the steps described in section 5.3 *Marking the Vehicle for Export to Checkmate*.

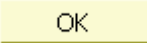
Cont. next page

5.2. Editing Common Option Codes in FDR

Task	Description/Result
1. If you need to make any edits to the Common Option Codes that were entered on the handheld, click the  menu.	The Vehicle menu list displays.



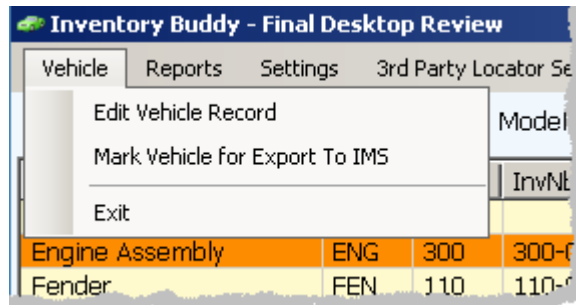
2. From the menu, click  .	The Vehicle Record window displays.
---	-------------------------------------

3. Click the dropdown arrow at the end of a field to make a new selection.	NOTE: You can also type directly into a field.
4. After making your edits, click  .	Your edits are saved and are propagated to the User Description for the appropriate part types.

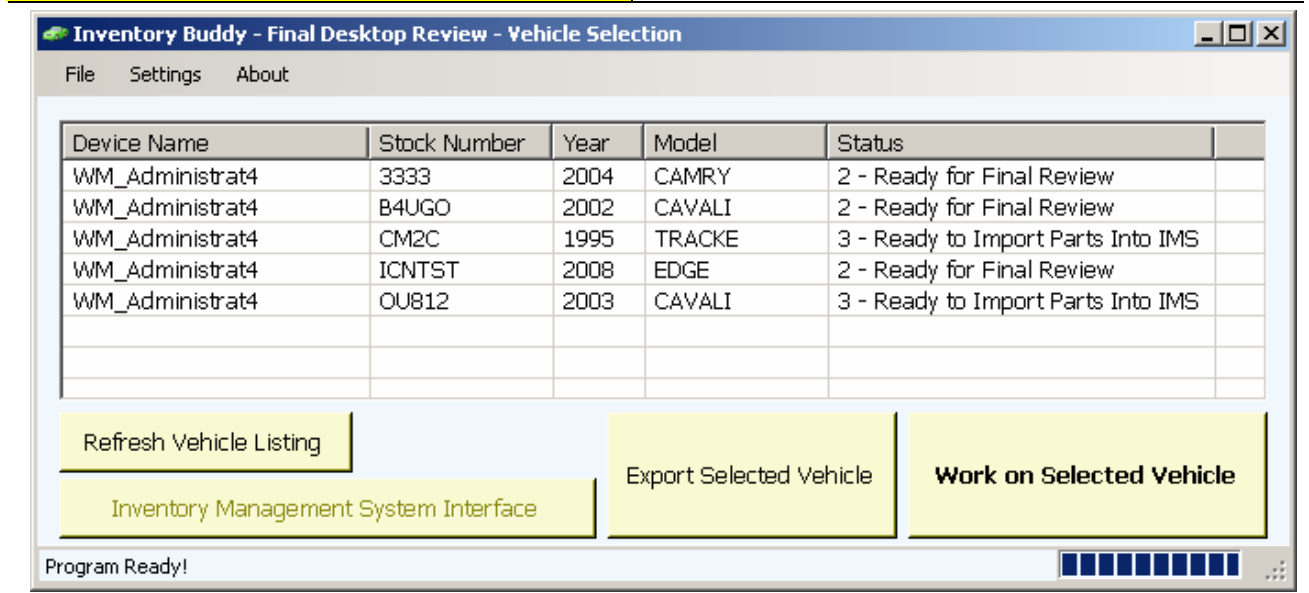
Cont. next page

5.3. Marking the Vehicle for Export to Checkmate

Task	Description/Result
1. When you are finished with your vehicle in FDR, click the Vehicle menu.	The Vehicle menu list displays.



2. From the menu, click Mark Vehicle for Export To IMS .	The part list for the vehicle closes and you are returned to the Final Desktop Review - Vehicle Selection window. The vehicle is now at status 3 – Ready to Import Parts Into IMS .
---	--





3. You can close this window and go to Procomm for the next step, or open another vehicle and work on it.

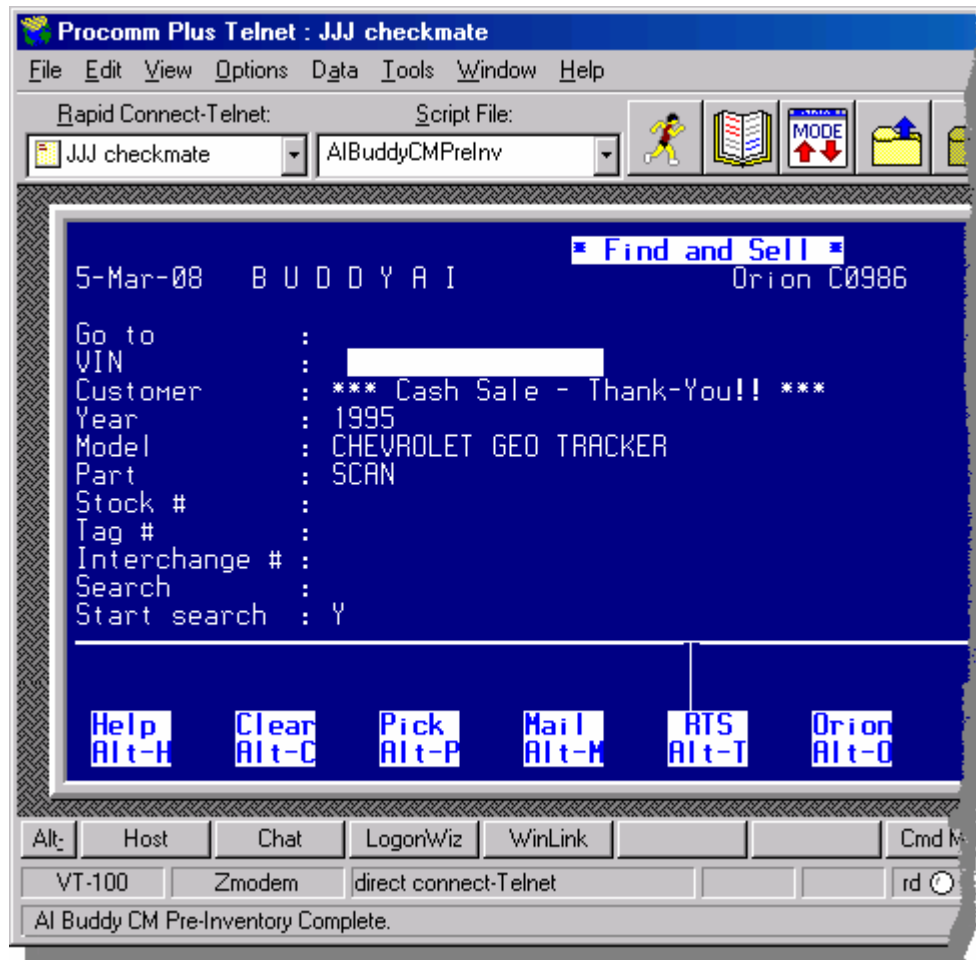
Any status 3 vehicles are available for the final processing step. This last step takes place in your Procomm interface to Checkmate. This is described in the following chapter.

6. Uploading Inventoried Parts into Checkmate

After your vehicle(s) are at status 3, they are available for processing into Checkmate. This is accomplished by running a script in the Procomm interface. After completion they can be deleted from the handheld. The following sections explain these procedures.

6.1. Upload Vehicles into Checkmate

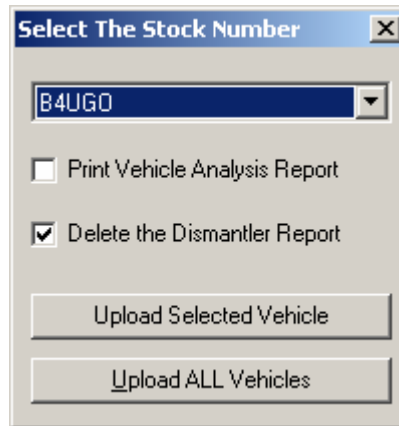
Task	Description/Result
1. Launch Procomm and log into Checkmate as you normally do.	If you already have Checkmate running, skip this step.
2. In Checkmate, go to the Main Menu.	Note: The Buddy scripts must be run while sitting at the Checkmate Main menu.



3. On your keyboard, while holding down the Control key press the F2 key.

The **Select The Stock Number** dialog box displays.

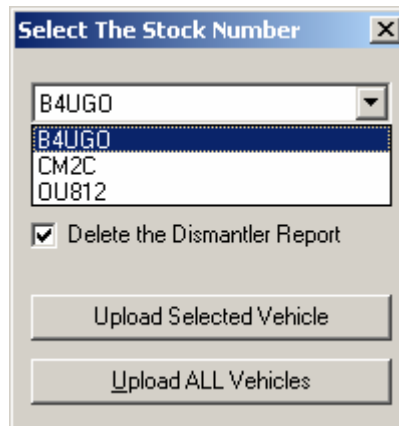
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4. In the top field, click the drop down arrow.

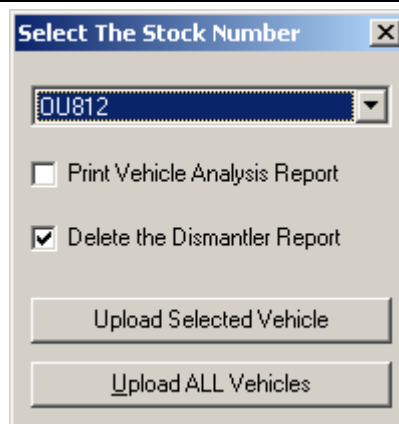


The drop down list displays all vehicles in status 3 (Ready to Import Parts Into IMS).

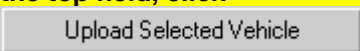



5. If you want to process a particular vehicle from the list, click on it.
Example:

The drop down list closes and the clicked vehicle displays in the field.



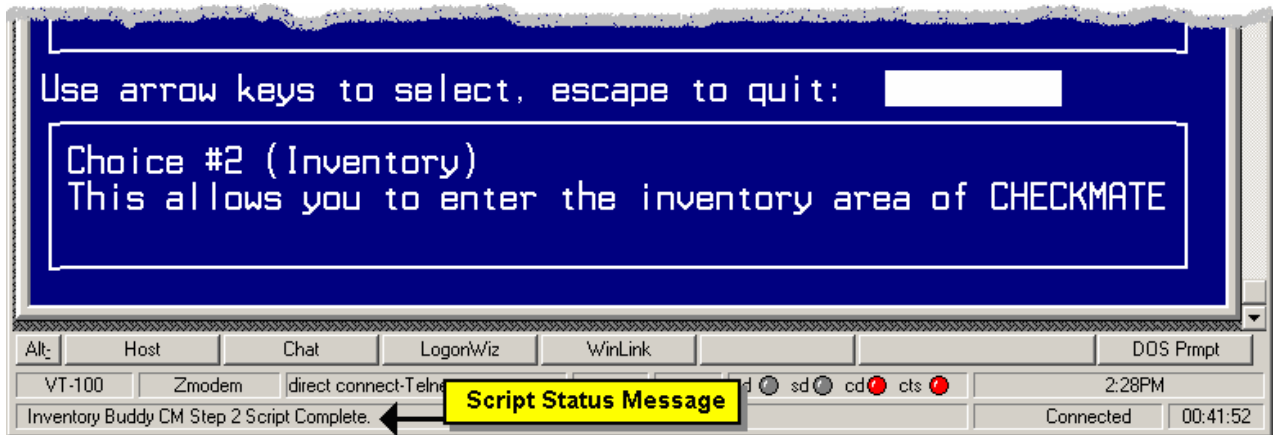
Cont. next page

<p>6. If you want Checkmate to print its Vehicle Analysis Report, click in its check box.</p>	
<p>7. If you DO NOT want the dismantler report deleted for any processed cars, uncheck this box.</p>	
<p>8. To process ONLY the vehicle showing in the top field, click . To up load all vehicles in the drop down list, skip to the next step.</p>	<p>The dialog box closes and the script to process the vehicle starts.</p>
<p>9. To upload all vehicles in the drop down list click ,</p>	<p>The dialog box closes and the script to process the vehicle starts.</p>

 **It is important to NOT use the keyboard while Buddy scripts are running unless you minimize Procomm first.**

As the script runs you will see a fast entry your parts into Checkmate. When the script finishes, Checkmate is returned to the main screen and the Procomm status message at the bottom of the screen displays, "Inventory Buddy CM Step 2 Script Complete".

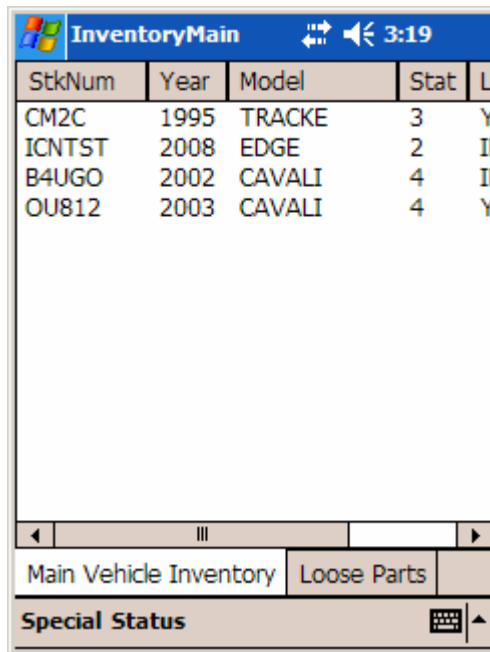
The next time the handheld is connected and synced with the PC, the status of the processed vehicles will change to status 4 – **Vehicle Complete**.



<p>10. You can now delete the completed vehicles from the handheld as described in the next section.</p>	
<p>Cont. next page</p>	

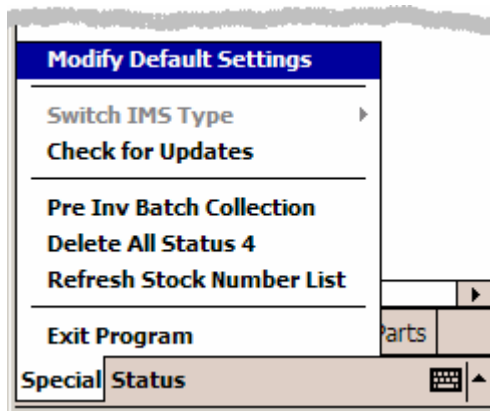
6.2. Delete Processed Vehicles from the Handheld

Task	Description/Result
------	--------------------



1. Tap **Special**

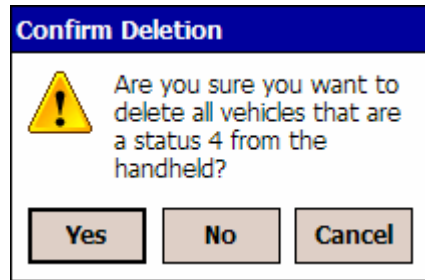
The Special pop-up menu displays.



2. Tap **Delete All Status 4**

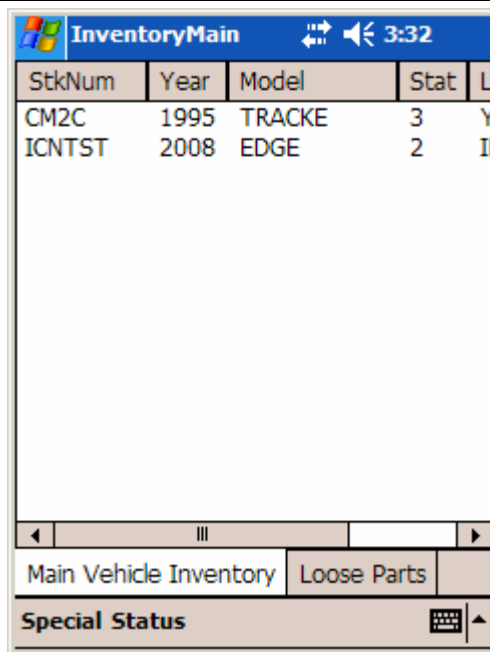
The **Confirm Deletion** dialog box displays.

Cont. next page



3. Tap

The **Confirm Deletion** dialog box closes and you are returned to the Inventory Main screen. All status 4 vehicles are deleted.



This section complete.