

USING CABPARTS ONLINE ORDERING

SETTING UP MATTERSMITH

Let us know when you are ready to give it a try and we will have an email invitation sent to you directly from Mattersmith. When you respond to that email, you will be sent to the Mattersmith portal to register by setting a user name and password. Once that is done, you will be able to go to app.mattersmith.com and sign-in whenever it is convenient.

THE CABPARTS ONLINE ORDER WORKFLOW IS GENERALLY:

[Create Order](#) > [Select Catalog](#) > [Job Information](#) > [Presets](#) > [Line items](#) > [Edit line items](#) > [Submit Order](#)

After logging in, select “**Orders**” from the top ribbon, then “**Create Order**” on the upper right. Below that you will also see a list of any previous quotes (which you can select and edit) and your submitted orders (which are locked once submitted and *cannot be edited*.)

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But what if I made a mistake, or need to make a change or add something to my submitted order?

No problem - just go to the **Status** dropdown in your order (which now says “**Submitted**”) and select “**Save as New Quote**”. That will generate a copy of everything in the order, give the copy a new Order Number, and then open in that new order. You can edit and work in that new order/quote just as you did in the original and submit it again with all of your changes now in place.

Do not forget to go back to the “old” order and “**Cancel**” it (again under the Status dropdown) so we do not process the old, now outdated and obsolete, order.

Can CabParts see or help with my order after I submit it? Your quote is built on your device and saved in the cloud as you work. *CabParts can see it, but cannot change it - only you can do that.*

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Selecting “**Create Order**” will take you to the menu page and you will need to select the catalog you want to use for the order. Check “**Select Catalog**” and make your choice, then “**Create Order with Catalog**”.

THE CATALOGS:

The **FasTrack** and **Complete** catalogs both contain all of the available cabinet and variable choices. They take different approaches and which you use will depend upon the job you are about to enter and your personal preference.

1) While *limited to CabParts stock case materials only*, using the **FasTrack** catalog lets you select a minimal number of presets and then, only if needed, use the line-item configurator to set each *individual cabinet’s* variables or add doors, drawer fronts or drawer boxes. **This approach is the fastest, especially if you only order boxes, or**

2) You can use a greater number of presets at the beginning to apply to all of the cabinets in your order and then use the configurator/editor to make changes to single cabinets - the **Complete catalog** takes this approach. It also has all available cabinet selections, as well as preset defaults for doors, drawer fronts, drawer boxes and many other variables.

Let us know if we can help, but enjoy exploring – you are in control and nothing is set in stone.

ENTER JOB INFORMATION and SET YOUR PRESETS

Fill in the contact and other **Job Information** (use today's date in the “**Due By**” box unless you do need a specific delivery date beyond the current lead time) and other information at the top of the form. The **Project** and **Phase** entries will be used to label this job in the order listings for future use when you return to the order process. Each order will automatically be assigned an **Order #** for use and reference throughout the process.

Once that section is completed, you are ready to select your universal **Presets**. Each has a drop-down menu for a variety of selections. If you make any changes from the defaults, you will see a blue “**Save**” box appear below on the right. Save your presets.

WARNING: You can change your presets at any time, just know that you need to “Save” them to apply the new values. Once you do **it will apply them to any and all of the cabinets or line items you have entered** below and **will overwrite** any changes you made to individual items.

Any changes you later make by editing individual cabinets **will overwrite earlier presets.**

BE AWARE: Be sure to examine the preset “**Top Drawer Front Height**” if it is a choice. It defaults to the smallest possible size, which is 4.625 (4-5/8”). **You probably do not want that.** Our suggested (and standard) drawer front height is 6.125 (6-1/8”). Set it now!

As to any of the **sliders**: you can click on and drag the ball, you can type the value in the box on the left, or you can click on the ball and then use your left or right keyboard arrow w keys on your keyboard to move it either way in 1/16” increments at a time - slide it close, then fine tune it with the arrow keys. Direct typing in the box is the fastest.

TIP: Immediately to the left of the Presets heading is an arrow. Clicking it will hide the presets and save a fair amount of screen space. Click the arrow again to bring them back to your screen.

ENTER LINE ITEMS

Once you are satisfied with your presets, you are ready to begin entering your **line items/cabinet selections**. You can change any of the line defaults (quantity, width, depth, and the like) by editing the boxes.

The first selection for each line is the “**Product Code**” and, as in many software interfaces of this type, you can do things in several ways which all lead to the same results:

1. If you know the code, just type it in and then select it, or
2. Click on the dropdown arrow and select “View Details” which will bring you to a built-in graphic catalog where you can make a selection, or
3. Drag the right-side slider down and make your selection, or
4. Type in the first letter or two of your choice, which will very quickly take you right to that section of the list, where you can make a selection from the list.

You MUST enter something in the “ID” box for each line – your reference number or text or a combination of both. You have eight spaces to use and what you type here will appear on the part labels to identify them as belonging to this specific cabinet. You may leave it blank on one line, but you will generate an error if you try to leave it blank. In fact, if you see an “**unexpected error**” message or something like it, you might check the ID box first.

When you are satisfied with the line entry, **double-click the small green disc** on the right. It will calculate and display the price.

If the price looks higher than you are used to, please remember that, unlike our earlier system (AdvanceWare), it includes everything you have placed in that cabinet, including the box itself and all of the edgebanding, shelves, doors, drawer fronts, drawer boxes, drilling, and hardware. And, it is prior to any available discount.

The **trashcan** will delete the entire line.

USING THE CONFIGURATOR FOR INDIVIDUAL CABINET VARIABLES AND OPTIONS

After the price is displayed, you can enter the **configurator/editor** – click on the small blue icon that replaces the green disc icon on the right of the line. That will take you to the individual configuration options and the 3D display. Once you are there, you can left click and drag your mouse to rotate the cabinet and view it from any angle and you can change any of the variables and options in the menu on the right. They will be reflected in the 3D model as you make them. (roll the wheel, if you have one, on your mouse to zoom in or out.)

Some of the options in the menu appear in all of the cabinets but may not apply to this particular unit. An example would be the Blind Hinge Type selections if you are not working with a blind corner cabinet.

On the left, over the “**Save**” button, is the “**X-ray**” function, where you can make the cabinet transparent and view the interior to verify shelves, drawer boxes and the like.

Once you are done there, “**Save**” (or “**Close**” if no change). You will be returned to the order page, with the price updated, ready to enter the next item by using the “+” symbol or “Add new line item”, at the top right.

SUBMIT YOUR ORDER

Once you complete your order, you can forward it to us by going to “Status” and selecting “**Submit**”, you can “**Cancel**” it, or you can “**Save as a New Quote**”.

TIP: “**Save as a New Quote**” can be used to make a **Template** which you can use any time in the future. Just enter the information you would like to have pre-entered and not have to repeat each time, type “**Template**” as the **Project**, save it as a copy and then work in the copy.

Once we have received your order, we will review it and add any freight, sales tax, discount amount, or special materials charges or credits, etc. We will then submit it back to you both directly in Mattersmith and via email (from contact@cabparts.com) for **final approval**. Once you have given that approval, and the appropriate payment is made, we will place your order in line for production and provide you with a Projected (estimated) Ship Date (PSD). If you require any non-stocked materials or hardware we will place those orders.

Should you find it necessary to “**Cancel**” your order, any refund after your payment will be dependent upon the state of production of the order and those special materials and hardware.

Your order will be assigned to a Sales Representative - they will be happy to answer any questions you might have and assist you in any way possible.

Feel free to email contact@cabparts.com or call us at 970-241-7682.

Our business hours are 7:00 AM to 4:30 Mountain Time.

Thank you and we look forward to working with you to make your project a success !