

CABPARTS ONLINE ORDERING – USER MANUAL

SETTING UP MATTERSMITH

We will have an email invitation sent to you from Mattersmith. When you respond to that email, you will be sent to the Mattersmith portal and asked to set a user name and a password to protect your information in the system. Only you will have access to it.

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](#)

CREATE YOUR 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 your previous quotes and orders (submitted quotes), which you can access instead of starting a new order. CabParts can view your order, but only you can work with it.

SELECT YOUR CATALOG

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 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) Using the [FasTrack catalog](#) you select a minimal number of presets and then use the line-item configurator to set each individual cabinet's variables only if needed. While limited to stock case materials, you can add doors, drawer boxes and the like to any individual cabinet by using the line-item configurator. This approach is the fastest if you only order boxes made from stock materials.

2) The [Complete catalog](#) gives you a greater number of presets at the beginning. You apply them to all of the cabinets in your order unless you then use the configurator/editor to make changes to single cabinets. 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) and other information at the top of the form. If you are just experimenting you might type “TEST JOB” as the phase in your headings. The Project and Phase entries will be used to name this job in the 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 previously entered below and will overwrite any changes you made to individual items.

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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 range 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 while using the left or right arrow 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.

What if I cannot find a material (panel, edgeband, slab door material, etc.) listed as available in the Online program?

For example, I want to use a Wilsonart laminate on my doors, drawer fronts, and finished end panels but do not see it listed as an option?

Answer: If you can't find a specific material (such as a Wilsonart laminate) or edgebanding listed in the CabParts Online program, follow these steps:

1. Look for the "Custom" option in the drop-down lists.
2. Select "Custom" to access your choice of up to 3 grained materials, 3 non-grained materials, or 6 edgebands.
3. **Be aware** that when you select a custom material the same numbered edgeband is automatically tied to that material (for example, band 3 to material 3). For a different edgeband, select a different number (here, anything but 3).
4. CabParts Online will take the custom items you've selected and use a "high average" material cost to temporarily price your order.
5. Use the [Custom Materials order form](#) on the CabParts website Resources page to tell CabParts what your custom materials and edgebandings actually are. Save the form as a PDF.
6. Submit your online order, then email and attach the Custom Materials form to contact@cabparts.com or print and send it by FAX to 970-241-7689.

Once we have the information, we will check pricing and availability, adjust your quote up or down as needed, and send you a job confirmation email with final pricing for your approval.

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.

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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 APPLICATION OF ANY DISCOUNTS THAT MIGHT BE AVAILABLE TO YOU.

The trashcan will delete the entire line.

USING THE CONFIGURATOR - 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.

What if CabParts Online does not include a cabinet I need, or I cannot adjust an existing cabinet to get the results I want?

For example, I want to remove the dado and back altogether, or extend the right side up and the left side down, or I want to drill for pulls or locks, but those options are not available?

Answer: If CabParts Online doesn't include the specific cabinet or adjustment you need, follow these steps: 1. First, use CabParts Online only for what it can do.

2. For those really special or custom items that Online cannot do, use the separate [Custom Items order form](#) on the CabParts website Resources page to tell CabParts what your custom materials and edgebandings actually are.
3. Save the form as a PDF and print it if you need a hard copy.
4. If you have a drawing or other special information, scan and save it as a PDF or print it.
5. Send the PDF as an email attachment to contact@cabparts.com. Alternatively, you can print and FAX it to 970-241-7689.
6. After receiving your emailed PDF or FAXED order, we'll prepare an estimate for your approval.
7. This Custom Item Order portion of your order will be handled separately. If part of an online order, it will be assigned the same Order Number with an Add-on (e.g., "Order # 856-A1").
8. Let us know if you want everything shipped together or separately once

completed. **SUBMIT YOUR ORDER**

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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](#)".

Once you "[Submit](#)" the order, it is locked and can no longer be edited. You may realize after submission that, for example, you forgot a cabinet and need to add it. Simply "[Save as a New Quote](#)" and then "[Cancel](#)" the current order. The new quote will have a new order number and you can use it to make the addition and then submit the new version. You can "[Save](#)" again, if needed, at different stages of the process.

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, assign a sales representative and contact you for any needed additional information such as freight, sales tax, discount amount, or special materials charges or credits, etc. We will then submit it back to you directly and via email for final approval. Once you have given that approval, and the appropriate payment is made, we will place your order into the queue for production and provide you with an estimated Projected 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.

Feel free to email 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 !

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