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.

Selecting **Create Order** will take you to the menu page and you will need to select the catalog, Builder3D (for cabinets) or Closets, you want to use for the order. Check **Select Catalog** and make your choice, then **Create Order with Catalog**.

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 Number** for use and reference throughout the process.

Once that section is completed, you are ready to select your universal job defaults in **Presets**. Each available Preset has a drop-down menu for a variety of selections. If you make any changes to the defaults, you will see a blue "Save" box appear below on the right. You must Save your presets to continue.

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.

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.

You <u>MUST</u> 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, click on 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 <u>everything</u> 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 you might be entitled to.

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

If CabParts Online doesn't include the specific cabinet or adjustment you need, follow these steps:
1. First, use CabParts Online <u>for all of the cabinets or closet units it can do</u>.
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.

10/25/2024

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.)

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.

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. Ignore them.

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 forward it to us by going to "Status" and selecting "**Submit",** which sends the order to us for review.

You can also "**Cancel"** it, or you can "**Save as a New Quote"** to re-use it again later**.**

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.

If you forget something or make a mistake on the submitted order and want to make changes:
Let us know and we will return the order to you so you can make any changes needed. You then re-submit the order.

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 !

10/25/2024