

## How to Use the CabParts Online Order System

A guide to setting up your account and using the CabParts Online ordering system, powered by Mattersmith.

### 1. Setting Up Your Account:

- You will receive an email invitation from “accounts@mattersmith.com”
- Click the link in the email to go to the Mattersmith portal and follow the prompts to create your account. Use the “Name” shown in your Welcome email and set a password.
- Once registered, you can log in anytime at [app.mattersmith.com](http://app.mattersmith.com).

### 2. Create a new or access a previous Order:

- **Log in** to Mattersmith and select "**Orders**" from the top menu.
- For a new Order:
  - Click "**Create Order**" (top right).
  - On the menu page, choose the **Catalog** you need (e.g., Builder3D for cabinets, Closets) and click "**Create Order with Catalog**".
- For an existing Order, click on the desired Order listed below the "Create Order" button.
- **Note:** *CabParts staff can view your orders to assist, but only you can change them.*

### 3. Entering Job Information:

- Fill in the contact details and other required information at the top.
- **Project & Phase:** These fields name your job for future reference. Use descriptive names (e.g., "Smith Kitchen", "Master Closet"). Use "TEST JOB" if just practicing.
- **Due By Date:** Use today's date unless a specific delivery date is required.
- An **Order Number** will be automatically assigned.

### 4. Setting Presets

- **Presets** define your default settings for the entire job (materials, construction methods, etc.) using the drop-down menus in the "Presets" section.
- **Save Presets:** If you change any defaults, a blue "**Save**" button will appear. You *must* click this to apply your changes before adding items.
- **Warning:** You can change Presets later, but saving them again will apply the *new* defaults to *all* line items already entered, overwriting any individual item modifications.
- **Hiding Presets:** Click the small arrow > next to the "Presets" heading to collapse this section and save screen space. Click it again to expand.

5. Using Custom Materials or Edgebanding if a specific material (e.g. a laminate) or edgeband isn't listed:

- Look for the "**Custom**" option in the preset drop-down list.
- Select "Custom". You can define up to 3 custom grained materials, 3 non-grained materials, and 6 custom edgebands per order.

- **Note:** Selecting a custom material automatically links the corresponding numbered edgeband (e.g., Custom Material 3 links to Custom Edgeband 3). To use a different edgeband, choose a different custom slot number.
- The system will use a temporary "high average" cost for quoting custom items.
- Download the **Custom Materials form** from the CabParts website Resources page.
- Fill out the form specifying your exact custom materials/edgebanding. Save it as a PDF.
- **Submit your online order first.**
- Then, email the completed Custom Materials PDF form to [contact@cabparts.com](mailto:contact@cabparts.com) or FAX it to 970-241-7689.
- CabParts will verify pricing and availability, adjust your quote accordingly, and send a final confirmation for your approval.

## **6. Adding Line Items (Cabinets/Units)**

- After Presets are saved, add items using the "**Add new line item**" button or the "+" symbol.
- For each line item:
  - **Product Code:** Select the cabinet or unit. You can do one of the following:
    - Click the dropdown arrow and select "View Details" to browse a graphic catalog.
    - Scroll through the list using the slider.
    - Type the first few letters to jump to that section of the list, then select the item.
  - **ID:** Enter a unique identifier (up to 8 characters/text/numbers) in the "ID" box. This ID appears on part labels to identify which cabinet they belong to.
  - **Dimensions/Quantity/Door Swing:** Adjust defaults as needed.
  - **Calculate Price:** Click the small **green** disc icon on the right to calculate and display the item's price.
  - **Delete:** Click the trashcan icon to delete the entire line item.
- *Pricing Note:* The displayed price includes all of the cabinet box, edgebanding, shelves, doors, drawer fronts, drawer boxes, drilling, and hardware specified for that item.

## **7. Editing Individual Line Items - Using the Configurator**

- After calculating the price and the **green** disc turns **blue**, click the **blue gear icon** to open the Configurator/Editor.
- **3D View:**
  - Left-click and drag to rotate the cabinet model.
  - Use your mouse wheel to zoom in/out.
  - Click the "**X-ray**" button (above "Save", lower left) to view the interior construction.
- **Modify Options:** Use the menu on the right to change variables (dimensions, materials, hardware, construction details) for *that specific cabinet*. Changes update the 3D model instantly.
  - *Range Sliders:* Adjust by dragging the ball, typing a value in the box, or clicking the ball and using keyboard arrow keys for fine +/- 1/16" adjustments.
  - *Ignore Inapplicable Options:* Some options may appear which do not apply to the selected cabinet type (e.g., blind hinge options on a standard base cabinet). Ignore these.
- Click "**Save**" to apply modifications and return to the order list.
- Click "**Close**" to discard changes. The line item price will update if changes were saved.

## 8. Handling Custom Items: When you need a cabinet or modification not offered in the online tool:

- Complete your online order for all standard items first.
- Download the **Custom Items order form** from the CabParts website Resources page.
- Detail the special/custom items needed on this form.
- Scan any relevant drawings or additional information. Save everything as PDFs.
- Email the PDF form(s) and any drawing PDFs to [contact@cabparts.com](mailto:contact@cabparts.com) or FAX them to 970-241-7689.
- CabParts will prepare a separate estimate for these custom items for your approval.
- This custom portion will be handled separately but linked to your main order (e.g., Order # 1856 may have a custom add-on order # A1-1856).
- Inform CabParts if you want standard and custom items shipped together or separately.

## 9. Submitting Your Order

- Once your order is complete, go to the "**Status**" dropdown menu (near top, on left).
- Select "**Submit**". This sends the order to CabParts for review.
- Other **Status** Options:
  - **Cancel**: Deletes the order permanently.
  - **Save as a New Quote**: Creates a copy of the current order as a new quote. Useful for variations or creating templates.
- **Tip**: To save time, create an order with common settings/items, enter "**Template**" as the Project name, then use "Save as New Quote". Use this template and save again for future orders.

## 10. After Submission

- **Making Changes**: If you need to change a Submitted order, contact CabParts. They will return the order to you for editing, after which you must re-submit it.
- **CabParts Review**: CabParts will review your Submitted order, assign a sales representative, and the Sales Rep will calculate any:
  - Freight costs
  - Applicable sales tax
  - Adjustments up or down, for example, for custom materials/items
- **Final Approval**: You will receive a "Confirm with Designer" status confirmation in Mattersmith, which will now include those charges. If you agree to the completed Order, you approve this confirmation by changing the Status to "**Accepted**"
- **Payment & Production**: Once Accepted and payment arrangements are made, your order enters the production queue. CabParts will provide an estimated Projected Ship Date (PSD) and any required non-stocked materials/hardware will be ordered.
- **Cancellation**: If you cancel after "**Accepted**" approval and payment, refunds depend on the order's production status and costs incurred for special materials/hardware.

**Note**: If you need more help or would like to make a change or correction after you have Submitted or Accepted your order, contact your Sales Rep at CabParts immediately.

- **Email**: [contact@cabparts.com](mailto:contact@cabparts.com)
- **Phone**: 970-241-7682
- **Hours**: 7:00 AM - 4:30 PM Mountain Time