



New Client On-Boarding Sheet

Steps for new customers to begin designing and submitting orders

(Closet Pro and Allmoxy accounts MUST be set-up)

Step 1: Understanding Our Ordering Programs - Closet Pro and Allmoxy:

- **Allmoxy** is our parts ordering system. This is where all ordering for the purpose of production originates. Consider it a shopping cart. Allmoxy bids can be manually created and modified prior to submitting for production. Allmoxy also has many more product features than what Closet Pro offers, and this is where those modifications would be made. If you need a few miscellaneous parts, it can be faster to manually create an order in Allmoxy and submit for production immediately.
- **Closet Pro** is a design software that allows the designer to create designs and calculate pricing for the design. Once submitted as an order, this design is imported by us into Allmoxy. From there it becomes a simple parts order that, until the designer clicks the “Submit” button, can be modified to whatever extent they require to meet their design needs.

Step 2: Set Up Allmoxy - Payment Set-Up Process

Bank payment information:

- Enter your bank payment details in Allmoxy.
- Note: Credit card payments incur a processing fee.
- Bank account verification can take up to **48 hours**, so complete this step as soon as possible to avoid delays when submitting orders.

Tax exemption documentation:

- Submit any required tax exemption information to **Samanta Sosa** at **AP@canarycc.com**.
- Ensure this is completed early to prevent issues with billing or order processing.

Step 3: Training & Onboarding Process

1. Initial Learning

- Watch all **Closet Pro** and **Allmoxy** training videos available on our website canarycc.com.
- The link to these videos can be found at the top of the Allmoxy platform.
- Completing these videos will give your team a strong foundation and make our support more effective.

2. Customized Training

- After all videos have been watched, you can schedule customized training sessions for you and your design team.
- These sessions will focus on advanced topics and address specific areas where deeper training is needed.

3. Complimentary Orientation

- Email: sales@canarycc.com & tony@canarycc.com; we can schedule **1–2 hours of complimentary training and software orientation via Zoom**.
- This ensures your team is confident in using the tools and ready to apply them to real projects.

Step 4: Design & Ordering Guide

- **Familiarize yourself with the “Design and Ordering Guide”** available through the link in Allmoxy.
- This guide is essential for understanding how parts are produced and machined.
- Reviewing it will help your team avoid the most common design issues and eliminate assumptions about how parts will arrive.
- By following the guide, you’ll ensure smoother ordering, fewer errors, and more accurate expectations for finished components.

Step 5: Review Announcements in Allmoxy

- **Check the Announcements section in Allmoxy** each day before starting work.
- This is the central location for updates on **products, policies, and procedures**.
- Reviewing announcements daily ensures your team is always working with the **most current and accurate information**.
- Making this a routine will help prevent mistakes, keep everyone aligned, and streamline communication.

Step 6: Confirm Constant Contact Notifications

- In addition to announcements in Allmoxy, **all customers will be notified of changes through Constant Contact**.
- We will send a **Contact Email** so you can confirm it is reaching the correct email address and not being filtered into the spam folder.
- This ensures you never miss important updates and can act quickly on new information.

Step 7: Begin Creating Designs in Closet Pro

*Tips when setting up new customers:

- **Markup settings:** Ensure standard and accessory markups are correct.
- These can be set per customer or as a default in their account settings.
- Markups act as multipliers to calculate customer pricing over your cost.
- Customer's price is always visible; clicking **Advanced** shows their cost in parentheses.
- **File management:** Create a **new file for each customer**.
- Avoid placing all orders under one account, as too many designs in a single customer slows the system.
- **Naming conventions:** Always give each room a **unique name**.
- If a room is copied, rename it uniquely as well.
- Unique naming prevents submitting the wrong design and makes troubleshooting easier.
- Using unique names within the first three letters helps with **job site part sorting** (see "Design and Ordering Guide" for label details).

*Design Closets as Needed

Step 8: Design Guidelines & Support Notes:

1. Price adjustments – Some solutions may cause a price increase, so issues should be resolved before giving customers a final quote.
2. Order revisions – If issues arise after an order is placed, the order may need to be released back for revisions in Closet Pro.
3. Allmoxy modifications – Customers can make modifications in Allmoxy, but our support is limited to issues that cannot be resolved in Closet Pro.
4. Accuracy – Designs should be as accurate as the system allows.
5. Product availability – Only products available in Closet Pro are currently offered.
6. Special requests – If a needed product is missing, direct requests to Melissa Reyes at sales@canarycc.com.
7. Reference materials – Use the door and color brochure as a quick reference for product and color availability.
8. Color limitations – Some colors are not available for all products.
9. Compatibility – Following this guide helps avoid compatibility issues.
10. Tutorial Videos Requirement
 - We are happy to assist with the design process, especially for new users.
 - However, all tutorial videos must be watched first to ensure efficient use of support time.

Step 9: Submitting Order:

1. **Before ordering:**
 - Review all details carefully.
 - It is recommended to always check the **Tech drawings** once a design is considered complete.
2. **Contact us before submitting an order** - If you encounter any issues or uncertainties while preparing a design, please reach out **before submitting the order**. Early communication helps prevent pricing surprises and ensures smoother processing. Primary Contacts:
 - **Michelle Ambrogio** – michelle@canarycc.com – Account-set and order processing
 - **Tony Guiliano** – tony@canarycc.com – Engineering, Closet Pro & Allmoxy training
 - **Melissa Reyes** – sales@canarycc.com – Closet Pro training, design & product questions
3. **Ordering process:**

- Select the checkbox to the right of each design to be included in the proposal.
 - Group all designs for the same order into one proposal.
 - Submitting separate proposals for each room may result in different completion dates.
4. Click **Create Proposal** and **save**.
 5. From the **Actions** menu, select **Accept**.
 6. From the **Actions** menu, select **Purchase**.
 - This opens the purchase screen where you can:
 - Choose shipping options
 - Request a completion date (subject to processing availability)
 - Add shipping notes and special requests (see “Design and Ordering Guide” for requirements).
 - Confirm that the proposal status shows **Sold**.
 - This indicates the order has been received and is in the processing queue.
- Once the order is submitted - Once submitted, the order will be imported into Allmoxy and processed. A bid will then be generated in Allmoxy, and a confirmation email will be sent from **Tony@canarycc.com**.
 - For orders without design issues or special requests, this process typically takes **24–48 hours**. The confirmation email will notify you that the bid is ready for review. At that point, you may either approve the bid as-is or request revisions based on specific requirements.
 - All bids are prepared according to the specifications outlined in the **Design and Ordering Guide**. No additional changes will be made unless explicitly requested.
 - Please note: this confirmation email replaces the automatic notification generated by Allmoxy when a bid is created. Submitting a bid for production before receiving the confirmation email may result in errors with your order.

Step 10: Order is processed:

1. When the order is processed, if there are issues with your design, we may contact you to address it, release the order back to them for design revisions, or process it into Allmoxy and provide notes for areas of concern in the confirmation email. They would then be responsible for either fixing things themselves in Allmoxy, asking for assistance, or accepting that everything is intended to be as submitted. Which option is utilized will be determined on a case-by-case basis.
 - This email may also contain notes with indications of possible areas of concern. The absence of any notes does not indicate that there are no issues, only that everything is processed according to the design, and nothing was noticed by us that would indicate a potential issue.
 - Once the bid is approved in Allmoxy, the bid can be submitted for production. The process for this is as follows:
 - If you need something special that cannot be addressed using standard available options in Allmoxy, you must choose the option for “I have modifications questions” in the “Accept” drop down list. You must then contact us to discuss your needs prior to submitting this bid as an order. Someone from our design and engineering team will contact you to discuss your needs, if we can accommodate the costs and lead times. Once everything is addressed, we will then give authorization to submit the order. If you do not follow this process and simply place the order and include a note, that note may not be addressed and your parts will be processed as submitted.
 - Click the submit button at the bottom right (If you do not see it, make sure the black information bar is expanded by clicking the arrows at the top of the screen).
 - If there are any warnings in Allmoxy (Notes in a yellow box under a line item), it will let you know there are warnings. You must review these warnings and determine if they are of concern. Warnings do not indicate a problem, they simply inform you that the item may have information that you need to know about in order to confirm that everything is correct. Once receiving this warning window, you must close it, review the warnings (If you have not done so already when reviewing their bid),

and once satisfied, click the submit button again (note that if you do not thoroughly review and disregard a warning, or notes in my confirmation email, any issues arising from a problem with those items will not be subject to remake policies). This will take you to the terms and conditions window. Once you read and approve terms and conditions, the click on “Agree”.

- After clicking “Agree”, you will be taken to the payment page. Here you can choose the payment option (If you have not yet set up your banking info to use as payment, you will have to do it now and wait 24-48 hours for their account to be verified). All new accounts require payment at the time of submitting the order. Other payment options (pay at shipping/delivery, terms, etc will be determined on a case-by-case basis which will be dependent on past order history and must be requested directly to Darren).
- If you are interested in utilizing our new financing options, you must contact Darren Ambrogio at darren@canarycc.com to discuss the setup procedure for this.
- Choose payment method and your order is now placed. Once placed, there can be no changes to the order, and you are responsible for the order as submitted. Any changes should be included as a new order for the revised parts. If this revised add-on order is received after a date was provided for the original order, the revised order will dictate a new date for the complete order.

Step 11: After your order is submitted:

- Once the order is placed, our scheduling department will review the order and assign a completion date and update the order to verified status. You will receive an email indicating any update to the status of your order. If you want to request a specific date, you can include that in Allmoxy and we will do our best to accommodate. Any additional requests regarding the lead time on an order will only be addressed by us on orders that are placed. We cannot provide lead times on speculation of an order that is still in “Bid” status, or not yet ordered in Closet Pro. These inquiries should be referred to Michelle Ambrogio at Michelle@canarycc.com.
- Questions regarding shipping costs, methods, and arrangements should be directed to Cristian Yerseovich in shipping at shipping@canarycc.com

Step 12: Order Pick-up or Delivery:

- Once your order is complete, you will be notified by our shipping department to schedule pickup. Pick-up at Union and Springfield location are both located at the back of the buildings
- Delivery. Once a delivery is scheduled, you will be provided with the final shipping cost which must be paid in full prior to your order leaving our facility. Any excessive delays in scheduling your pick up or delivery past your originally scheduled date may result in storage fees.
- When you receive your delivery, you must thoroughly inspect the product and, if there is any noticeable damage, contact us immediately. Our shipping department can provide you with more detailed information regarding policies concerning damage upon arrival.

Step 13: What is a remake?

1. Our remake policy covers the replacement of a product that is either missing, damaged, or incorrectly manufactured, or in any way not as specified in the final approved Allmoxy order.
 - **Missing:** An item in the order that are not received are subject to replacement. Note that in most instances of a request for missing items, those items are typically found on site after further inspection.
 - **Damaged:** If you see noticeable damage on a delivery to the pallet, you must provide photos of the pallet prior to removal from the truck. This will allow us to file a claim with the carrier and approve your remake ASAP. If you encounter damage during the unpacking phase, you must provide us photos of both the actual damaged part as well as the part label.

- **Incorrectly manufactured:** If you have a part that you believe is machined incorrectly, you must provide photos of the parts and the label. We will then review this against the order to determine how the incorrect machining occurred so we can be sure that the replacement part is not made with the same issue. This would also apply to accessories and hardware items if you did not receive the correct product that was ordered.
- If you experience **any of these issues and require a remake**, you must open the original order in Allmoxy and, at the bottom right, select the “**Request a Remake**” option. This will allow you to scroll through the order to the affected items, provide a quantity needed, and a reason for the remake request. In the black information bar on the right, you will find the option to attach files. This is where you will attach the required photos. Once completed, you can submit the remake order. Note that when submitting a remake order, items can only be replaced as originally ordered. If you require any changes, then this would require a separate order to be placed for new items. If the item that requires replacement is part of a kit (complete drawer assembly, door or pair of doors with hinges, etc), **note which components requires replacement in the reason section. If you request a remake of a drawer, we will contact you to determine which component is needed.** This could add time to getting your remake processed. If you notify us initially, this will allow us to expedite the process.
- Remake requests must follow this format. Please communicate these requirements to your installation crew so they can provide you the necessary information to get your remake into the system ASAP. Requests for remake will not be accepted verbally or as lists submitted by email.

Step 14: Canary Contact List:

If you require any assistance, please direct your inquiries to the correct department:

- **Samanta Sosa** - Accounts payable AP@canarycc.com / ext 104: Any financial related issues with your orders or account.
- **Stephanie Sanchez** – Customer Service Operations@canarycc.com: General customer service inquiries.
- **Michelle Ambrogio** - Data/Job Processing– Michelle@canarycc.com / ext 114: Customer service for Closet Pro and Allmoxy, Inquiries regarding scheduling of orders for production.
- **Cristian Yersevich** – Shipping – shipping@canarycc.com / ext 122: Inquiries regarding shipping costs and order status once in production.
- **Melissa Reyes** – Sales - sales@canarycc.com / ext 103, Sales, Design, Closet pro & All Moxy training
- **Tony Guiliano** – Desing and ordering, Training Tony@canarycc.com: Customer service for Closet pro and Allmoxy. Schedule training for Closet Pro and Allmoxy. Request for custom and off menu items.
- **Darren Ambrogio** – Owner Dambrogio@canarycc.com / ext 101