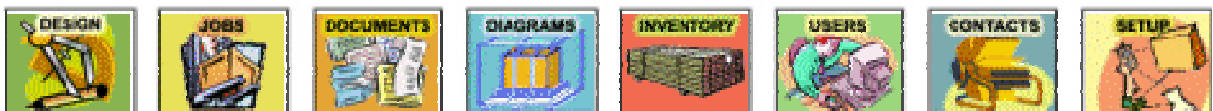




# CRABAPPLE PRO 5™

## GETTING STARTED



# **CRATE PRO 5**

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Information contained herein is deemed accurate but is not guaranteed.  
See the actual software for final features and functionality.

If you find any errors, please let us know at [info@cratepro.com](mailto:info@cratepro.com)

# CRATE PRO 5



## Getting Started with Crate Pro

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This document is intended to help you get started using Crate Pro as fast as possible. It assumes you are already familiar with crate or pallet manufacturing and are comfortable with computers.

Use this document like a check list. If you need more information, check out the question mark (?) buttons near many of the fields.

Reference the Glossary of Terminology as needed.

Reference the Operating Manual as needed.

Reference the Diagrams file as needed.

Read the steps for each section before proceeding with the steps for that section.

You can view videos on how to setup Crate Pro by visiting [www.cratepro.com/downloads.html](http://www.cratepro.com/downloads.html)

# CRATE PRO 5

## 2 Inventory

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ONLY USE THE IMPORT FEATURE FOR ONGOING MAINTENACE. DO NOT IMPORT YOUR INITIAL INVENTORY.

Crate Pro's inventory materials are linked to the Setup file for use as default materials when creating a new design.

Establishing your materials manually is the most challenging part of getting started with Crate Pro but by following these instructions you will be up and running as fast as possible.

- 2.1 Print a complete inventory list from Crate Pro.
- 2.2 Gather your existing inventory onto a single document. A spreadsheet is best. Assure you have all the data that is on the Crate Pro inventory list such as cost, vendor, actual size, weights, etc.
- 2.3 Match up your 'old' inventory items to existing Crate Pro inventory items.
- 2.4 Make a note on the Crate Pro inventory printout if you want to change the description to match your old inventory descriptions.
- 2.5 Modify the costs, etc. in the Crate Pro inventory to match your current costs. Note that **Crate Pro calculates lumber by linear foot.**
- 2.6 In your old inventory, cross out the materials that have been matched to Crate Pro's inventory.
- 2.7 Delete any undesired materials from Crate Pro's inventory. Assign any plywood or lumber that you delete to the closest matching material that you will keep.
- 2.8 Assign all the remaining materials in your old inventory a category based on the tabs in Crate Pro's inventory file.
- 2.9 Sort your old inventory based on the category.
- 2.10 Note the fields in Crate Pro's inventory that do not exist in your old inventory such as weight.
- 2.11 Add the fields (columns) to your old inventory as required then add the data as required that Crate Pro will need. Refer to existing materials in Crate Pro as needed to identify what data to enter.
- 2.12 Use the add button (looks like a sheet of paper in the upper left corner of the Tool Bar) to add your remaining inventory materials. You must add them on the page for the category they will be a member of.
- 2.13 STOP and backup the C:\Program Files\Crate Pro\Program 5\CPInventory.CP5 file (or just backup the entire directory)

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## 3 Setup

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- 3.1 A sample box is already included in the Designs file. Recreate that box on your usual cutting instruction sheet. Modify it as necessary to match your typical construction.
- 3.2 Have an average employee(s) build the box. Time the process dividing the time into the time segments shown below; (Refer to the beginning of the manual for a little more detail if desired.) Every second for when the employee is handed the cut sheet until the last nail is driven should be included. No preparation should be done in advance. The process should be exactly as done on a daily basis.
  - 3.2.1 Setting the stop on the panel saw
  - 3.2.2 Cutting the plywood (time per linear foot/meter)
  - 3.2.3 Setting the stop on the cut-off saw
  - 3.2.4 Cutting the lumber (time per cut per piece)
  - 3.2.5 Stitching the cleating to the panels
  - 3.2.6 Assembling the panels
- 3.3 Click through the tabs in the Setup file and enter the data as required.
- 3.4 If you find a material that is used by default in many places over-and-over, go back to the Inventory file and select Swap Default from the top of the screen. Replace the item with the new desired item then return to the Setup file.
- 3.5 Refer to the beginning of the Operating Manual for details about **Material Groups, Rules and Index Factors**.
- 3.6 **DECIDE NOW HOW YOU WANT TO NAME YOUR MATERIAL GROUPS.** On the Misc. – Material Groups page, update the names as desired.
- 3.7 Leave the existing default data in any fields as desired.
- 3.8 While viewing crates on the Styles page, uncheck all the crate styles (not pallets) Review the Crate Pro Styles section of the Diagrams file and determine which styles you want to make available within your company. Recheck those styles to make them available when you create designs.

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## **4 Contacts**

- 4.1 Backup the contacts file
- 4.2 Use the Contacts spreadsheet template that is on your Crate Pro CD and organize all your current customers or all your contacts if desired to match the spreadsheet.
- 4.3 Refer to the Details screen to see how each field is used. (Check boxes use a value of '1' to be checked or ' ' (blank) to be unchecked.)
- 4.4 Remove the header (first) row and save the spreadsheet as a CSV file with a different name such as MyCompanyContacts.csv.
- 4.5 Import the spreadsheet using the default settings.
- 4.6 Review the results. If you find errors, restore the file from the backup, correct the problem and re-import.

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## **5 Users**

- 5.1 Adding users is not required but do so if desired
- 5.2 Refer to the Users chapter of the Operating Manual for details of how Crate Pro handles permissions.

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## **6 Jobs**

When you make a new crate record for quoting or for manufacturing it is called a 'Design'.

- 6.1 Create 1 new job for each salesperson you have plus add 3 more. Give them a Description of 'Joe', 'Bob', 'Sue', 'Other1', etc. You can change the name later. These will be available and always at the top of your list in case you want to use them as 'holding areas' for miscellaneous quotes before they convert to orders.

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## **7 Creating Designs**

- 7.1 Create a design or two and verify the results against your expectations.
  - 7.1.1 If pricing is not accurate, first review the data you have entered in the Setup file then design another crate. If it is still inaccurate, refer to the section about Index Factors in the manual and adjust the factors as required.
  - 7.1.2 If materials are inaccurate, review the pricing you entered. Crate Pro calculates material usage based on the actual amount used plus the waste factor for each individual component.