

Hint #7 Specifying the Default Materials for the Crates you Build

Getting the [Set-Up module](#) configured to YOUR Company is perhaps, the most critical component in having Crate Pro create your designs to your specifications. Once done, you only need to revisit this module to change materials as your company policy dictates, which we hope, is not too often!

In the [Set-Up](#) module – the **Construction** tab is where we will focus. For each category of crate: light, medium and heavy duty, there are two tabs that deal with the cap construction. The cap consists of the top, ends and sides but not the base. If you have created any designs in Crate Pro (CP) you will see within each category the familiar words: *Affordable* and *Durable*, which are also displayed here to give you greater flexibility when designing.

When you are designing a new crate you select a Style from one of the categories: light, medium or heavy duty. You also select whether the construction should use ‘Affordable’ or ‘Durable’ materials (unless you have changed these terms: **Set-Up – Misc – Material Group Names**). The materials that CP uses to design your crates is pulled from the information in Set-Up. If your company policy is to use different material, you can specify it here.

There is also a tab that specified the **Rules** CP will use to construct your design. This covers the type of fasteners used, cleat placement, fastener spacing, drop panel and other tolerances, etc. You do not need to change any of this information but if you find you’re shop is consistently doing things differently, you need to look here and make changes as needed.

Construction – Bases will have sub tabs for each category as well. As above, review the materials, rules and tolerances used for designing.

Pallets : Same information applies as above.

Packing: Floater Deck material, and packing. Do you, by default, use packing materials? Instead of adding it every design, just specify it right here. Based on your inside dimensions and tolerances, the correct amount will be calculated in your designs.

!! If you change the default material, make sure it is an [Active](#) material (Hint #2)

Also in the [Set-Up](#) module click on the **Tolerances** tab and confirm these settings match your company policies.

In the [Set-Up](#) module click on the **Misc** tab then **Other** tab and confirm these settings match your company policies.

Once complete the construction of your crates using Crate Pro will follow your shop policies. This will speed up your design process as you should now have less material modifications. Crates that have already been designed will not be changed so you will not lose historical data.

TEMPLATES

Remember that you can always start with any crate Style, modify it in any way and save it as a Template. When you open CP you can click on *List View* at the top to locate your templates or click on *Find* and search by Templates. Select the template you want to use and click on *Copy*. This will allow you to change your customer, change dimensions and other specifics of this design. CP will ask if you wish to refresh the design so that it updates the pricing for that customer and the material pricing if it’s different from when the template was created. By using the *Copy* command you do not lose your original template. You will need to check if by changing your dims you now have red lights on the *construction* tabs. If so, click on any of the lights and select *Run Rules*. As explained in an earlier Hint, this allows CP to recalculate the materials needed and costs due to the changes.

If you added any items into *Packing-Other* in your design which are size dependent, please review them as they are not recalculated when the dimensions are modified.