The Packaging Expert

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Welcome

The Packaging Expert

Introduction

Overview

The Packaging Expert is a tool to assist a Mail and Parcel Center (MPC) in properly packing and pricing the packaging for items customers bring into to the MPC store. Containers that can be configured are various styles of corrugated boxes and crates. Packaging that can be configured are wraps such as bubble wrap or polly foam sheeting, loosefill such as peanuts and paper, and Foam in Place. The tool will recommend the proper amount of padding space needed based on the fragility, weight, and value of the item to be packaged.

The Packaging Expert is extremely easy to use by the MPC personnel. When a customer brings in an item to be packaged the sales clerk usually enters the dimensions, weight, fragility, and value of the item. The Packaging Expert then displays a list of containers that are appropriate for the item. The sales clerk selects a container from the list and then The Packaging Expert then displays a list of packaging options that are appropriate for the item. Once the sales clerk selects the appropriate packaging options The Packaging Expert provides a sales price and all needed weights and dimensions needed to determine shipping. If needed, a Quote can be printed for the customer. After the sale is made the sales clerk can print a construction diagram for a custom box or crate.

All the containers and packaging options are completely configurable to reflect only the type of containers and packaging options offered by the store.

Getting Started

The Packaging Expert is fully configured at initial installation. If you accept all assumptions on how you should use the tool then you do not have to do any configuration. But you will probably want to customize the tool to your personal preferences. All configuration is performed in the configuration menu found on the Tools menu. The following steps will help guide you through the customization. For more detail on each step goto the help topic on that configuration screen. Also when you are in a configuration screen the F1 key will take you to the help topic for that screen. We would suggest that you edit your configuration and then do a lot of testing to make sure that you are getting the prices that you want to charge your customer.

Labor Rate	Go to the Miscellaneous configuration screen and set the labor rate you want to charge your customers for the work you perform. The default rate is set to $40 per hour.
Corrugated	Go to the Corrugated configuration screen and set up your corrugated sheets that you stock for custom box making. The most common types are already there but you will still need to edit the width, length, weight, and price since these vary widely from area

	to area. Remember the sheet weight is the weight of your whole sheet, so this will change if your dimensions change.
Plywood	If you are going to offer crate building you will need to setup the plywood you will use. Go to the Plywood configuration screen and set up your plywood sheets that you stock for crate making. The most common types are already there but you will still need to edit the price since this varies widely from area to area.
Lumber	If you are going to offer crate building you will need to setup the lumber you will use. Go to the Lumber configuration screen and set up your lumber that you stock for crate making. The most common types are already there but you will still need to edit the price since this varies widely from area to area. Also you may want to check you weights since this can vary from supplier to supplier depending on how dry the lumber is.
Packaging Items	Go to the Packaging Item configuration screen and setup what type of packaging you offer in your store. Some common Packaging Items are already configured for you. If you want to get rid of one you can delete it or disable it. If you disable it you can easily bring it back. When setting up the labor table, be sure to take into account what units are being used. For example: On Foam and Loosefill the labor table is cubic feet of material placed in the packaging job versus minutes. But on wrap packaging types the labor table is linear feet of material placed in the packaging job versus minutes.
Containers	Go to the Container configuration screen and setup the containers you offer in your store. Some common containers are already configured for you. If you want to get rid of one you can delete it or disable it. If you disable it you can easily bring it back. When setting up the labor table, be sure you understand the units used in the labor table. For containers the labor table is square feet of container surface area versus minutes. Also be sure to go into Associated Packaging Items and set up what packaging items will be associated with this container.
Fragility List	If you want to edit the example items in the Fragility List, go to the Fragility List configuration screen and change or add example items. These example items will display in the Fragility drop down list on the main screen. Having a good list makes it easy for a user to determine the fragility of items being packed.

If all of these steps have been performed then you are ready to use The Packaging Expert.

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Product support for The Packaging Expert is available to licensed users through the following channels:

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If you do need to call our technical support, please write down the version information of the version you are using. This information appears in the About dialog on the Help menu.

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The Packaging Expert

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Tutorial

Lesson 1 - Using Help

1 At the Main Screen, click on the **Help** button (upper right corner of the Main Screen).

2 Click on **Index** (upper left corner in the Help Screen). This shows a list of topics in the Help Menu.

- To view the information about any topic, click on any topic in the list.
- To quickly scroll to a specific topic, the topic can be typed in the small blank screen above the list. Simply type the letter **f**, and the list scrolls down automatically to each topic that starts with the letter f.
- Click on any topic in the list to see a description in the large field on the right.

3 Click on Search (to the right of Index in the upper left corner of the screen) to learn how to search for a topic.

- Type **container** in the blank screen on the upper left side, and several associated words are displayed below this to narrow your search.

- Click on **containers** to narrow your search, and see topics under this search word in the bottom left field.
- Click on Container List, and you will see a description of this topic in the large field on the right.

4 Click on Contents (to the left of Index in the upper left corner of the screen) to learn how to search for a topic.

- Double-click on Using the Packaging Expert, or you can simply click on the box to the left of these words that contains a + (plus sign). This opens up this folder so that you can see the contents.
- Click on Main Screen, and proceed to the next session that follows.

Lesson 2: Learning the Main Screen

1 First make sure that you are at the **Main Screen** (the screen that you get when you first start the application).

2 Now press the F1 function key. You will be taken to the help topic for the Main Screen. (Using F1 will work for most screens in The Packaging Expert)

3 Starting at the top left corner of the picture of the main screen that is displayed to the right, click on each button/field and read what each does.

4 Note that **New Customer** will clear the screen. If you are working on a quote and decide that you want to print the quote, click on **Add Information** to add customer and item information.

5 Note that the drop-down list that defaults to **Box Only** is where you specify the fragility level of an item.

6 The following lessons will help you to become familiar with using the main screen.

Lesson 3: Basic Quoting

1 This lesson assumes that the configuration of the application is the default that is installed with the intial setup.

2 A customer calls you for a quote. He has a framed painting without glass that needs to be packaged for shipping, the dimensions of the painting are 30 X 18 X 2, it weighs 15 pounds, and the value is $500.

3 At the main screen, type **30** in the box for **Length**.

4 You can either use the tab key, the Enter key, or you can use your mouse to go to the next box for Width. Type **18** in the box for **Width**.

5 Hit the tab key and go to the box for **Height**. Type **2**. (Height is always the side of the box perpendicular to the box opening in this application.)

6 Note that dimensions for these fields are stated in inches.

7 Tab to the **Weight** field and type **15**. Note that weight is entered in pounds.

8 Tab to the Fragility Level field that defaults to the term **Box Only**. Scroll down to the Delicate listing, and see defaults that are listed, and click on **Delicate, Framed Art w/o Glass**. The listed items are there as examples to use as guides when determining fragility.

9 Tab to **Value** and type **500**.

10 Tab to **Pieces** and type **1**, since you only have one item.

11 Tab to **Layers** and type **1**, since you only have one item and won't be doing multiple layers.

12 Notice now that under **Container**, the program has selected the only appropriate shipping containers for this item. Run your mouse pointer over each item and let it rest for a second on each, and a description for the packaging containers appears. This description is set when establishing configurations.

13 Click on **Full Telescope-350DW**. See now that it lists the price and the weight that this box will add to the quote.

14 Look at the bottom of the main screen and see the info that this provides so far.

15 The customer on the phone says, "Wait! My wife just told me that she is going to actually weigh the picture on our bathroom scales. She says that I'm lazy. Hang on a minute."

16 Delete the **15** pounds under weight. Notice how box selections disappear. This is because the weight greatly influences the type of shipping container.

17 The customer says that the actual weight of the television is 20 pounds. Type **20** pounds in the **Weight** field. Look at the fields in the bottom of the screen again.

18 Now click on **Foam-in-Place** packaging under **Packaging**. **Packaging** is what type of cushioning you decide to use for the item from the ones the program considers appropriate. Note that this tells you the weight and price that this adds to the packaging job.

19 Look at the fields at the bottom of the screen again, and see how the total quote price for the packaging has been updated.

20 The customer decides that they like this quote, and they want you to ship it. You need to continue with your store pricing. You decide to ship this UPS Ground. See that the Length Plus Girth (bottom of main screen) is 104 inches, yet the actual weight of the shipment is 27 pounds. You know that you need to charge for 30 pounds for this shipment, since it is UPS OSI (oversized 1). Quote your charges to the customer for shipping. He decides that he wants to have you do it all.

21 Click on **Add Information** (at the top of main screen), and enter the applicable information in all fields. Click **OK**.

22 Click on **Quote** (at the top of main screen). Click on **Print** at the top of this form.

23 Add your other information for shipping and retain this quote for verification for when you receive the item.

24 Click on **Diagram** (at the top of main screen), and click on **Print**. This prints a box or crate construction diagram for the container to assist you in performing the work.

25 To change the configuration to meet your own needs read **Getting Started with Your Configurations** under **Introduction** in the **Help** menu which will help guide you through setting up your own configuration.

Lesson 4: Configuration

Scenario: I want to enter in a stock box that is 24" X 20" X 10"

1 Click on **Tools** (top tool bar), then click on **Configurations**, then click on **Containers**.

2 In the form field **Container Name**, I type in ***Stock 24x20x10.***

3 In the form field **Container Type**, I select ***Stock***.

4 In Associated Fragility Levels, I select the following by checking the box next to it and writing in the following value amounts:

- *Rugged* is chosen with a $20,000 value, since we can pack any rugged item in this box. The only reason that I chose $20,000 is that I want employees to call me if they are doing any rugged item over this amount, so the program won't work for them with this box.
- *Moderately Rugged* is chosen, and I put in a maximum value amount of $4000.
- *Moderately Delicate* is chosen, and I put in a maximum value amount of $2000.
- *Delicate* is chosen, and I put in a maximum value amount of $750.
- *Very Delicate* is chosen, and I put in a maximum value amount of $250
- I did not choose *Extremely Fragile*, since I don't want employees to use this box for these items.

5 Under **Container Tool Tips**, I enter ***Stock 24x20x10 SW 200 Test***. I want employees to know the type of box that this is.

6 In **Limits**, I enter the following:

- *Weight* Minimum ***1*** lb.; Maximum ***75*** lbs. 75 pounds was the maximum limit that I saw on the bottom of the box.
- *Width*, Length and Height limits are not used for stock boxes.

7 In **Stock Box Settings**, I enter the following:

- *Inside Dimensions*: Length ***24***, Width ***20***, Height ***10***
- *Outside Dimensions*: Length ***24.5***, Width ***20.5***, Height ***10.75***; I know this from reasoning of what the corrugated adds to each dimension.
- *Box Weight*: I weigh the box, and it weighs just shy of 2 pounds, so I enter 2 pounds.
- *Retail Price*: I enter in our retail price for this product, which is $6.59. Note: This price should be your price to assemble and seal up this box without any additional packaging.

8 Hit **Save** when this part of the program is done. Then you will see other options available.

9 **Labor**: The labor table is not used for stock boxes.

10 Next I click on **Associated Packaging Materials** for this box. First I clicked on the top arrow to add Paper Packaging, since this is an acceptable packaging material for this box. Then I realized that if I clicked on the double arrows that it would add all packaging materials that are acceptable for this box. I did this, since I think all packaging materials are acceptable for this box.

11 I saved my work, but I realized that I wanted to edit *The Packaging Expert's* default for bubble wrap (see next tutorial).

Scenario: I want to edit the default packaging item on bubble wrap that The Packaging Expert offers.

1. Click on **Tools** (top tool bar), then click on **Configurations**, then click on **Packaging**.

2. Hit the navigation arrows **>>** to go to the item that you want to change. As I did this, I found bubble wrap.

3. Everything is right here, except that I want to edit the name of the bubble wrap and bump-up the price, so I clicked on **Edit**.

4. I changed the price to .75 a linear foot from the default of .50 a linear foot under **Material Price**.

5. I changed the name under **Packaging Item Name** from *Bubble Wrap Packaging* to *Bubble Wrap ½"*.

6. Under **Associated Fragility Levels**, I lowered the default values for *Rugged* to $8000, *Moderately Rugged* to $5000, *Moderately Delicate* to $750, *Delicate* to $400, and I added *Very Delicate* by checking the box and entering $200 as a value. These are my parameters that I have set for my business.

7. Under **Packaging Item Tool Tip**, I entered in the description that I wanted for this item. This is **½" Bubble Wrap**. We use 3/16" bubble packaging, too, so I wanted to distinguish between the two types of wraps.

8. I clicked on **Packaging Item Labor**, and this looked okay to me, so I left it the same. If I wanted to change it, all I would need to do is click on **Edit** and change what needs to be changed. If you want to delete an entry select the entry and click on **Delete**. If you want to add a new entry in the table click on **AddNew** and complete the blank line at the bottom of the table.

Scenario: I want to add Styrofoam to the packaging materials. The type we are going to add is 1" thick.

1. Click on **Tools** (top tool bar), then click on **Configurations**, then click on **Packaging**.

2. I click on Add New, since this is a new packaging item that is not in the default configuration provided with the software.

3. Under **Packaging Item Name**, I enter ***Styrofoam Pack***.

4. I choose ***Wrap*** under **Packaging Item Type.** This is not exactly a Wrap but we do not have a type that covers this and this will work. (Note: In an upcoming version new packaging types will be added)

5. In the form field for Packaging Item Tool Tip Information, I enter in this to alert our employees for this packaging material:

6. **Styrofoam is good for heavy items that are too heavy for foam in place and bubble wrap.**

7. Select the **Primary Packaging Item** check box, since this is a primary packaging item and we do not support non-Primary Packaging Items at this time.

8. **Material Weight and Cost Factors**

- **Waste Factor**: I entered in 10%. This is an estimate of how much will be thrown away as waste, out of sheet of Styrofoam.
- **Material Weight**: This is entered as pounds per linear foot. We are going to enter the wrap width as 48. So this entry should be the weight of a piece of Styrofoam that is 12" by 48". The sheets we use

are 4’ by 8’ so we weigh a whole sheet and divide by 8 feet. This resulted in 0.75 pounds. You could just weigh a piece that is 12” by 48” and enter that.

- **Material Price** Just like Material Weight, enter what you would charge for a piece of Styrofoam that is 12” by 48”. We charge $30 dollars per 4 x 8 sheet so we enter here $30/8 or $3.75.

9 Material Thickness Factors

- **Minimum Thickness**: Since Styrofoam is 1 inch thick and 1 layer is our minimum so enter 1 inch. If you wanted to always have at least 2 inches of Styrofoam when you use this packaging, then enter 2 inches here.
- **Maximum Thickness**: The most Styrofoam that makes sense is 4 inches or 4 layers. I entered 4 inches.
- **Thickness Increment:** Since I know that each layer of Styrofoam adds 1 inch to the padding thickness on one side, I entered 1 inch.

10 **Wrap Width:** The sheets are 4 feet wide so I entered 48” here.

11 **Pieces Labor % Increase:** I enter 25% here. I estimate that for each additional piece beyond one I will add 25% to the labor. Keep in mind that this 25% increase only applies to the calculated labor for the packaging, not the container.

12 I saved my work.

13 Now click on **Packaging Item Labor**. This will take you to a table that is used to determine the labor charge for this packaging. In this case “Wrap Packaging Type” the first column is linear feet of Styrofoam. Just like above the Styrofoam is 4 feet wide so 1 linear foot of Styrofoam is equal to 4 square feet. The second column is the number of minutes of labor needed for the corresponding linear feet of Styrofoam. For example a 12” cube box needs approximately 6 square feet of Styrofoam (if we only put in 1 layer of Styrofoam) which would equate to 1.25 linear feet (6 divided by 4). We estimate that this would take 5 minutes to perform. So we would enter 1.25 feet and 5 minutes in the table. We need entries in the table to cover the entire range of possibilities. Another example might be a 36” cube box with 4 layers of Styrofoam. The inside surface area of the box is 54 square feet (6 sides times 3ft times 3ft). With 4 layers an approximate quantity of Styrofoam would be 216 square feet (4 times 54 square feet). To get the linear feet in this case is divide by 4, which gives 54 linear feet. We estimate that this would take 30 minutes to perform. So we would enter 54 feet and 20 minutes in the table. We entered the following:

Feet	Minutes
1.25	5
5	6
20	15
54	30
100	50
200	75

14 I saved the table.

15 I clicked **Done**.

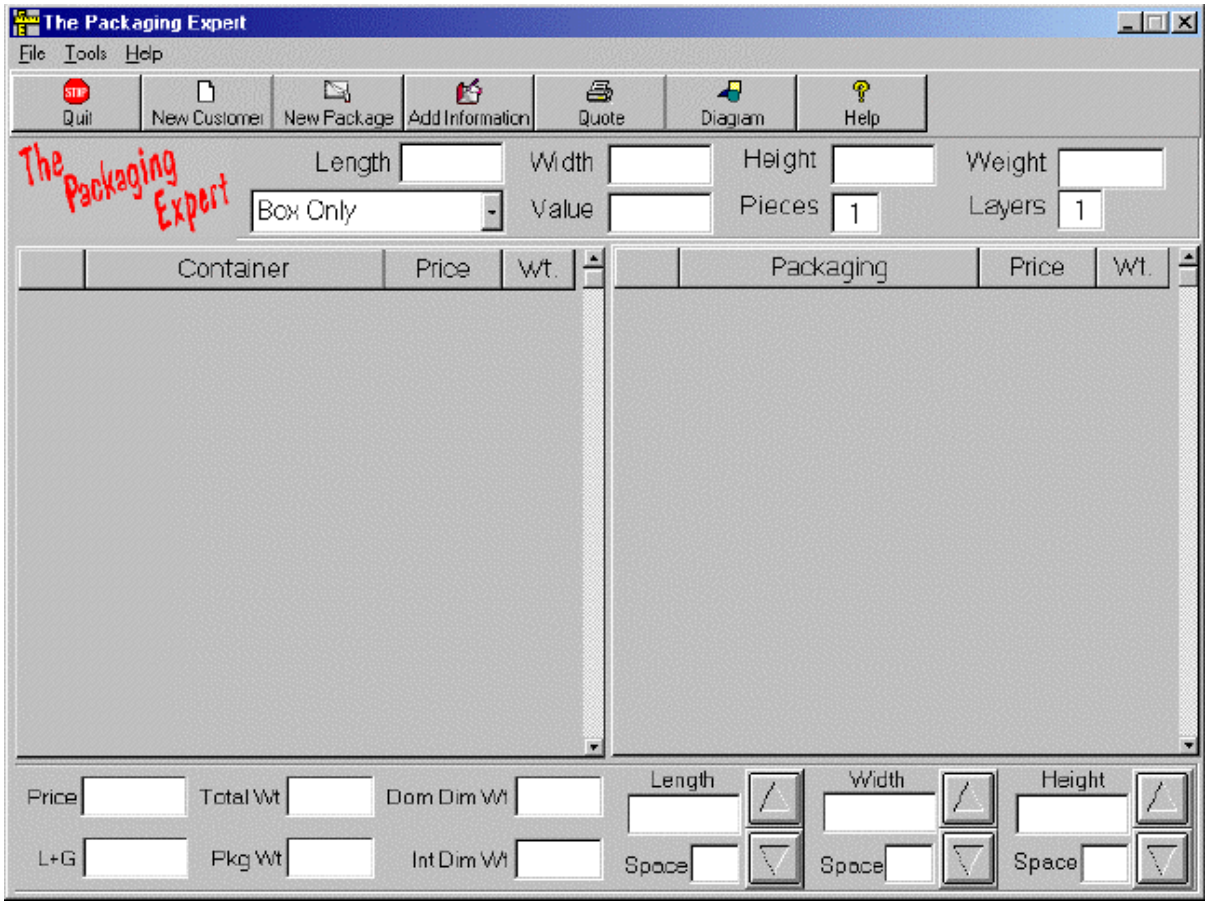
More To Come

Be sure to check for updates at www.visionalliance.com. We will be adding more tutorials and The Packaging Expert is being continually improved.

The Packaging Expert Main Screen

Main Screen

This is the main operating screen for The Packaging Expert. With a mouse touch the area of the screen you want learn about. If you have a touch screen then just touch the area with your finger.



Length

Enter the Length (inches) of the item to be packaged. If multiple items are to be packaged, you must figure how to arrange the items and how much packaging space to place between the items. Once you have done this the Length to enter will be the length of this arranged group of items without the outer packaging, The software will calculate the thickness of the outer packaging, Always enter dimensions so that the Length is longer or equal to the Width. For Box Only calculations this entry is the Inside Length of the container.

Width

Enter the Width (inches) of the item to be packaged. If multiple items are to be packaged, you must figure how to arrange the items and how much packaging space to place between the items. Once you have done this the Width to enter will be the width of this arranged group of items without the outer packaging, The software will calculate the thickness of the outer packaging, Always enter dimensions so that the Width is less than or equal to the Length. For Box Only calculations this entry is the Inside Width of the container.

Height

Enter the Height (inches) of the item to be packaged. If multiple items are to be packaged, you must figure how to arrange the items and how much packaging space to place between the items.

Once you have done this the Height to enter will be the height of this arranged group of items without the outer packaging, The software will calculate the thickness of the outer packaging, Always measure the Height perpendicular to the top. The top is always the side of the container you want to open. For example if you have a long thin item with dimensions of 3 by 6 by 30 and you want to open the container from the small end then the Length x Width x Height will be 6 x 3 x 30. For Box Only calculations this entry is the Inside Height of the container.

Weight

Enter the Weight (pounds) of the item or items to be packaged. This field can be left empty if this is a Box Only calculation.

Fragility

This drop down box lets you specify the fragility of the item(s) being packaged. What is in this drop down list is completely configurable. You can have many example items in the list to make it easier to determine the fragility. The Box Only value is for specifying just a box, no item to pack or packaging.

Value

Enter the Value (dollars) of the item or items to be packaged. This field can be left empty if this is a Box Only calculation.

Pieces

Enter the number of Pieces being packaged. This is used to calculate labor and quantify extra material for packaging.

Layers

Enter the number of Layers needed to package this item. This is used to calculate labor and quantify extra material for packaging. This is mainly needed for foam in place. For other types of packaging you can just specify the number Pieces.

Add Information

This button will allow you to add customer and package information for use by the Quote and Diagram printouts.

Diagram

This button will print the construction diagram for a custom box or crate.

New Customer

This button will clear all entries and get you ready for a new customer.

New Package

This button will clear the main screen and get ready for a new package foe the same customer. Customer information will be maintained

Quit

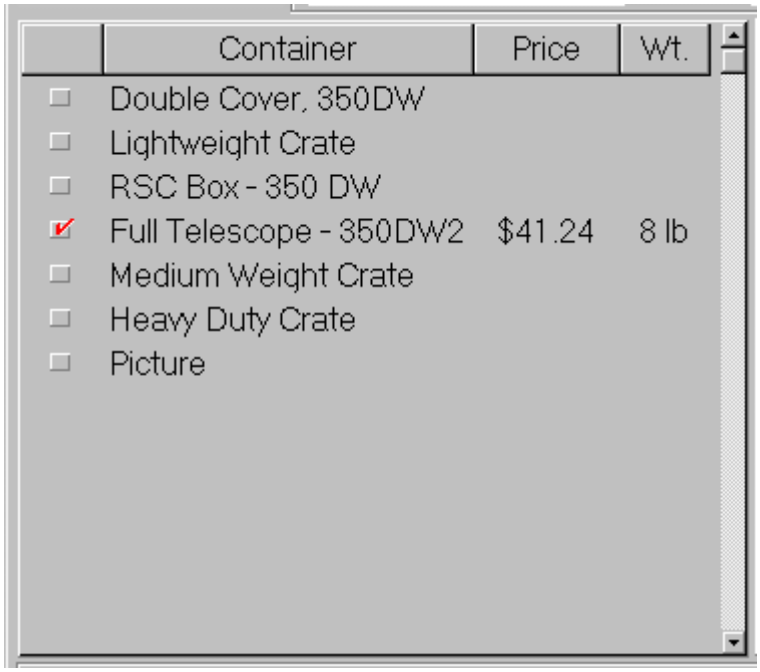
This button will shutdown The Packaging Expert

Quote

This button will print a quote for the customer.

Container List

The Container List displays all containers that the software determines are appropriate for the item(s) that are being packaged. With the mouse select the container you want to continue with. Once you select a container a check mark will appear next to the entry and a container price and container weight will appear.



Packaging List

The Packaging List displays all Packaging Items that the software determines are appropriate for the item(s) that are being packaged) and selected container. This will only display after all information about the item(s) being packed is entered and a container is selected. With the mouse select the Packaging Item you want to use. Once you select a container a check mark will appear next to the entry and a Packaging Item price and Packaging Item weight will appear.

Price

This field displays the total price of the container and packaging.

Total Weight

This field displays the Total Weight of the Container + Packaging + Contents of the package.

Pkg Wt

This field displays the total weight of the Container + Packaging, but not the contents of the package.

L+G

This field displays the Length + Girth of the completed package. This required to help determine the shipping charges for the package.

Dom Dim Wt

This field displays the Domestic Dimensional Weight of the completed package. This is calculated by dividing the Cubic Volume of the package in cubic inches by 194.

Int Dim Wt

This field displays the International Dimensional Weight of the completed package. This is calculated by dividing the Cubic Volume of the package in cubic inches by 166.

Cont Length

This field displays the Container Inside Length in inches.

Cont Width

This field displays the Container Inside Width in inches.

Cont Height

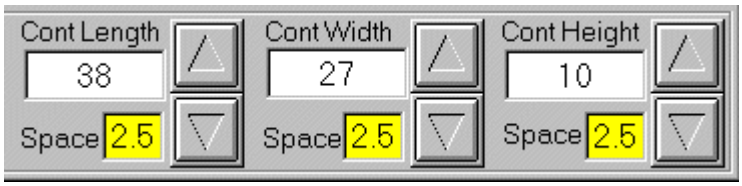
This field displays the Container Inside Height in inches.

Space

This field displays the Container Inside Space between the container wall and the item being packaged. The Space is displayed three times for Length, Width and Height.

Dimension Adjustment

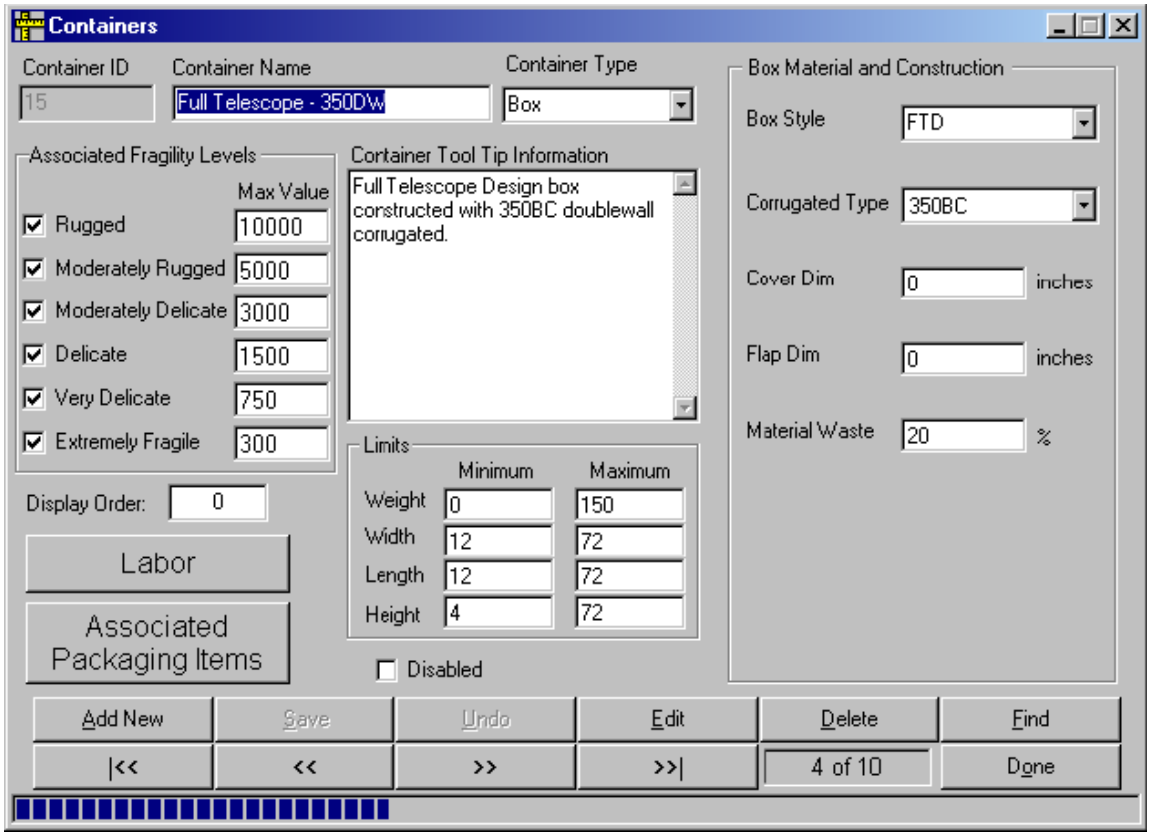
On selected containers that can have variable dimensions the Dimension Adjustment buttons allow you to adjust the container dimension overriding the dimensions determined by the software. When this is done the Space fields will turn yellow indicating that the cushioning thickness is not at its optimum value. You won't be allowed to decrease the dimensions beyond the point where Cushioning thickness is equal to the minimum thickness of the selected packaging.



Configuring The Packaging Expert

Configuring Containers

Containers can be added, edited or deleted. It is important that a container is properly setup. To get to the Container configuration screen select Tools on the Main Menu bar, then select Configuration, and then select Containers. To learn more about the Container Configuration screen go to the screen below and with a mouse touch the area of the screen you want learn about. If you have a touch screen then just touch the area with your finger.


Containers
Container ID
15
Container Name
Full Telescope - 350DW
Container Type
Box
Box Material and Construction
Box Style
FTD
Associated Fragility Levels
Max Value
Rugged
10000
Moderately Rugged
5000
Moderately Delicate
3000
Delicate
1500
Very Delicate
750
Extremely Fragile
300
Container Tool Tip Information
Full Telescope Design box constructed with 350BC doublewall corrugated.
Corrugated Type
350BC
Cover Dim
0
inches
Flap Dim
0
inches
Material Waste
20
%
Limits
Minimum
Maximum
Weight
0
150
Width
12
72
Length
12
72
Height
4
72
Display Order:
0
Labor
Associated Packaging Items
Disabled
Add New
Save
Undo
Edit
Delete
Find
|<<
<<
>>
>>|
4 of 10
Done

Container Name

This is the name of the container that will be displayed to the user. No two containers can have the same name. The length of the name is limited to 20 characters.

Container Type

Choose the type of container being configured.

Associated Fragility Levels (Containers)

These settings provide the capability to limit the availability of a container based on fragility and value of the item to be packaged. There are 6 fragility levels available that relate to how much force that can be applied to an object before it is damaged:

Rugged
Moderately Rugged
Moderately Delicate
Delicate
Very Delicate
Extremely Fragile

If a fragility level is not checked here then this container will not be available when that fragility is selected for an item to be packaged. If a fragility level is selected then the Max Value is used to determine if a container will be available. For example:

☑	Rugged	5000
☑	Moderately Rugged	3000
☑	Moderately Delicate	1000
☐	Delicate	0
☐	Very Delicate	0
☐	Extremely Fragile	0

If a fragility of Delicate is chosen for an item, this container will not display.

If a fragility of Moderately Delicate is chosen for an item and the value is set to $2000, this container will not display.

If a fragility of Moderately Delicate is chosen for an item and the value is set to $900, this container will display.

If a fragility of Rugged is chosen for an item and the value is set to $4000, this container will display.

If a fragility of Rugged is chosen for an item and the value is set to $6000, this container will not display.

If the Max Value is set to $0 then value will be ignored. Only fragility will be used.

Container Tool Tip Information

Information entered here will display if you hold the mouse pointer over a container displayed on the main screen. Use this to communicate any information about this container that you want users to see when they are selecting this container.

Display Order (Containers)

This entry allows you to control the order that containers are displayed on the main screen. Containers with lower numbers are displayed before containers with higher numbers. Containers with the same number will not display in any particular order.

Labor (Containers)

This button takes you to a screen that allows you to set up a table that is used to calculate labor minutes needed to make and/or assemble a container. The table lets you set up the number of minutes versus the size of the container in Square Feet. The Square Feet is the surface area of the container. For example a 12-inch cube box has a surface area of 6 square feet. There are 6 sides to a box and each side in this example is 1 square foot. You can have as many entries as you want here. When the labor calculation is performed the square feet of the container is calculated and then the labor is calculated by taking an average of known values at neighboring points in the table. For example if you have table entries of 10 Square feet, 20 minutes and 20 square feet, 30 minutes and the container being calculated has a surface area of 15, then the labor will have a value of 25 minutes. This is because the area was exactly half way between 10 and 20 square feet, so the labor would be exactly half way between 20 and 30 minutes.

The labor table is used for containers that have variable surface area such as custom boxes and custom crates. It is not used for stock boxes. On Custom Boxes and Crates if you leave this table empty then the price will be calculated on materials only.

Associated Packaging Options

This button takes you to a screen that allows you to establish which packaging options should be available when this container is selected. These packaging items are setup in the Packaging Item configuration screen. To associate a packaging item to the container being configured, just place the packaging item in the Selected Packaging Item column.

Limits (Containers)

The container limits section allows you to set limits on your containers. Here you can set a minimum and maximum for weight, length, width and height of the container. On weight if the minimum or maximum is exceeded then the container will not be available. On dimensions if the maximum is exceeded the container will not display but if the minimum is not met then the container will be resized to meet the minimum.

Stock boxes do not use the length, width and height limits and anything entered will be ignored.

Disabled

When checked this container will not be used by the application.

Container Type Specific Settings

This section will change depending on the type of container being configured. Go to the following topics for the specific sections.

Crate

Box

Stock

Picture Crate Specific Configuration Settings

Box Specific Configuration Settings

Box Style

This field is only for the Box Container Type. This selection establishes what box style the Custom Box will be. The available styles are:

RSC -

5PF -

FTD -

DC -

FOL -

Corrugated Type

This field is only for the Box Container Type. This selection is for picking the type of corrugated that will be used in the making of this box. The available corrugated is setup in the Corrugated Configuration screen.

Cover Dim

This field is only for the Box Container Type and only for DC style boxes. This setting specifies the depth of the top and bottom cover. A good value for this setting is 4 inches.

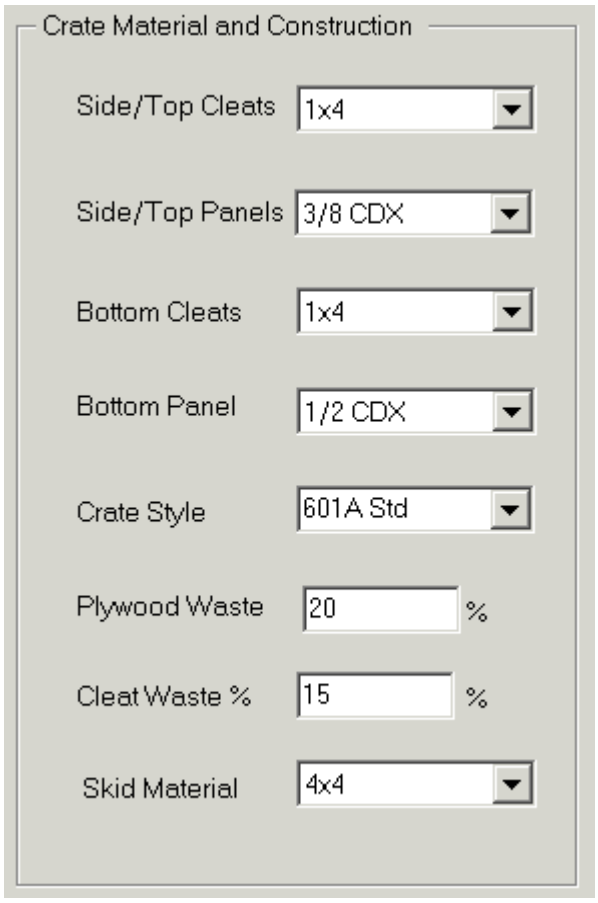
Flap Dim

This field is only for the Box Container Type and only for RSC/FOL/DC style boxes. This setting specifies the dimension of the overlap flap. On stock boxes of this style this is the glue flap. On custom boxes this flap is glued, taped or stapled. This setting should be set to at least 2 inches.

Material Waste

This field is only for the Box Container Type. This setting is for indicating the percentage of material used in making this box that is wasted.

Crate Specific Configuration Settings



Side/Top Cleats

This field is only for the Crate Container Type. This selection is for picking the material that is used for the Side and Top cleats on this Crate. The available material is setup in the Lumber Configuration screen.

Side/Top Panels

This field is only for the Crate Container Type. This selection is for picking the material that is used for the Side and Top panels on this Crate. The available material is setup in the Plywood Configuration screen.

Bottom Cleats

This field is only for the Crate Container Type. This selection is for picking the material that is used for the Bottom cleats on this Crate. The available material is setup in the Lumber Configuration screen.

Bottom Panels

This field is only for the Crate Container Type. This selection is for picking the material that is used for the Bottom panels on this Crate. The available material is setup in the Plywood Configuration screen.

Crate Style

This field is only for the Crate Container Type. This selection is for picking the style of the crate. The available styles are 601A Std and 601A Drop End.

Plywood Waste

This field is only for the two Crate Container Types. This setting is for indicating the percentage of plywood used in making this crate that is wasted.

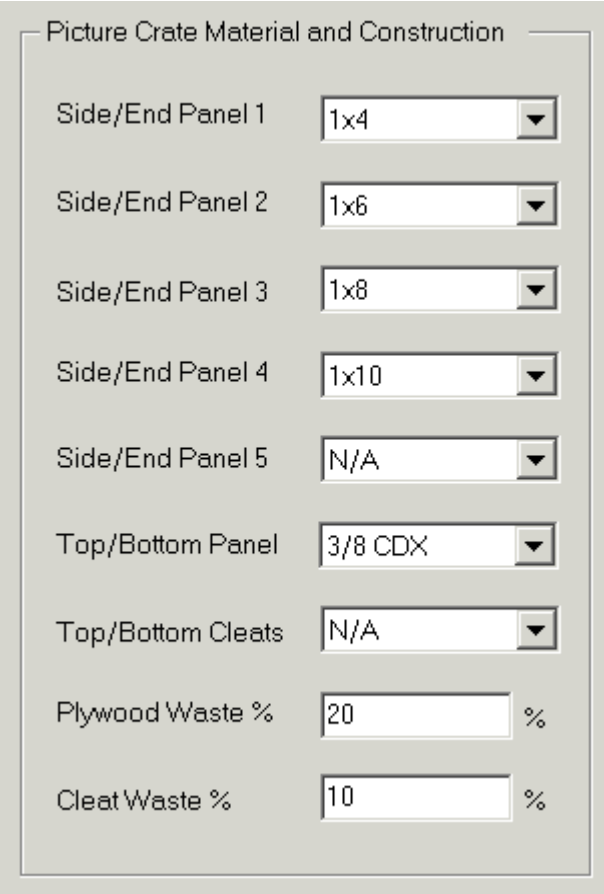
Cleat Waste

This field is only for the two Crate Container Types. This setting is for indicating the percentage of cleating material used in making this crate that is wasted.

Skid Material

This field is only for the Crate Container Type. This selection is for picking the material that is used for the crate skids. The available material is setup in the Lumber Configuration screen. If you do not want skids then enter N/A.

Picture Crate Specific Configuration Settings



Side/End Panel

These fields are only for the Picture Crate Container Type. This selection is for picking the material that is available for the Sides and Ends of this Picture Crate. There are five fields to be completed for this item. Enter each type of lumber to be used for the Sides and Ends of this Picture Crate. Enter the narrowest lumber first and then work your way up. If fields are left over select N/A. The program will select the appropriate Panel based on the item height and the required packing space. The available material is setup in the Lumber Configuration screen.

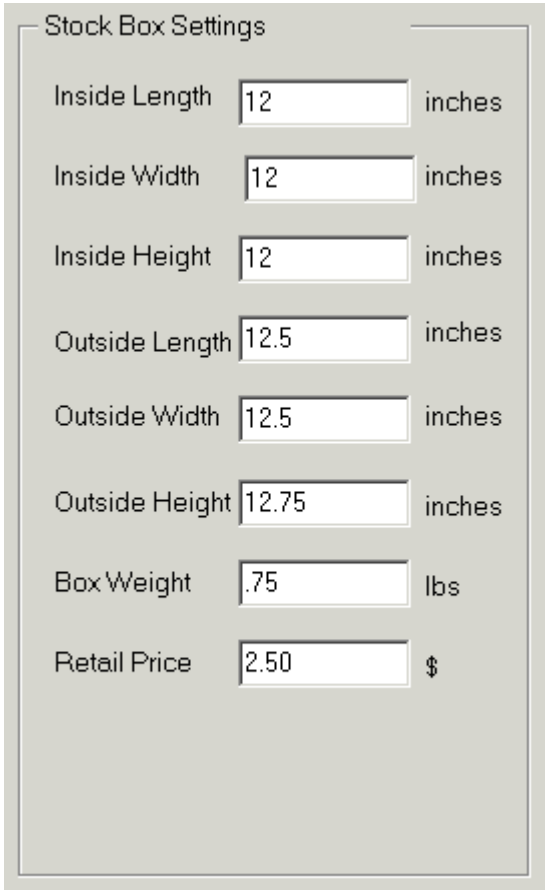
Top/Bottom Panel

This field is only for the Picture Crate Container Type. This selection is for picking the material that is used for the Top and Bottom of this Picture Crate. The available material is setup in the Lumber Configuration screen.

Top/Bottom Cleats

This field is only for the Picture Crate Container Type. This selection is for picking the material that is used for the Top and Bottom cleats for this Picture Crate. This is optional. If you do not want cleats select N/A. The available material is setup in the Lumber Configuration screen.

Stock Specific Configuration Settings



Inside Length

This field is only for the Stock Container Type. This is the Inside Length of the stock container being configured.

Inside Width

This field is only for the Stock Container Type. This is the Inside Width of the stock container being configured.

Inside Height

This field is only for the Stock Container Type. This is the Inside Height of the stock container being configured.

Outside Length

This field is only for the Stock Container Type. This is the Outside Length of the stock container being configured.

Outside Width

This field is only for the Stock Container Type. This is the Outside Width of the stock container being configured.

Outside Height

This field is only for the Stock Container Type. This is the Outside Height of the stock container being configured.

Box Weight

This field is only for the Stock Container Type. This is the Weight of the stock container being configured.

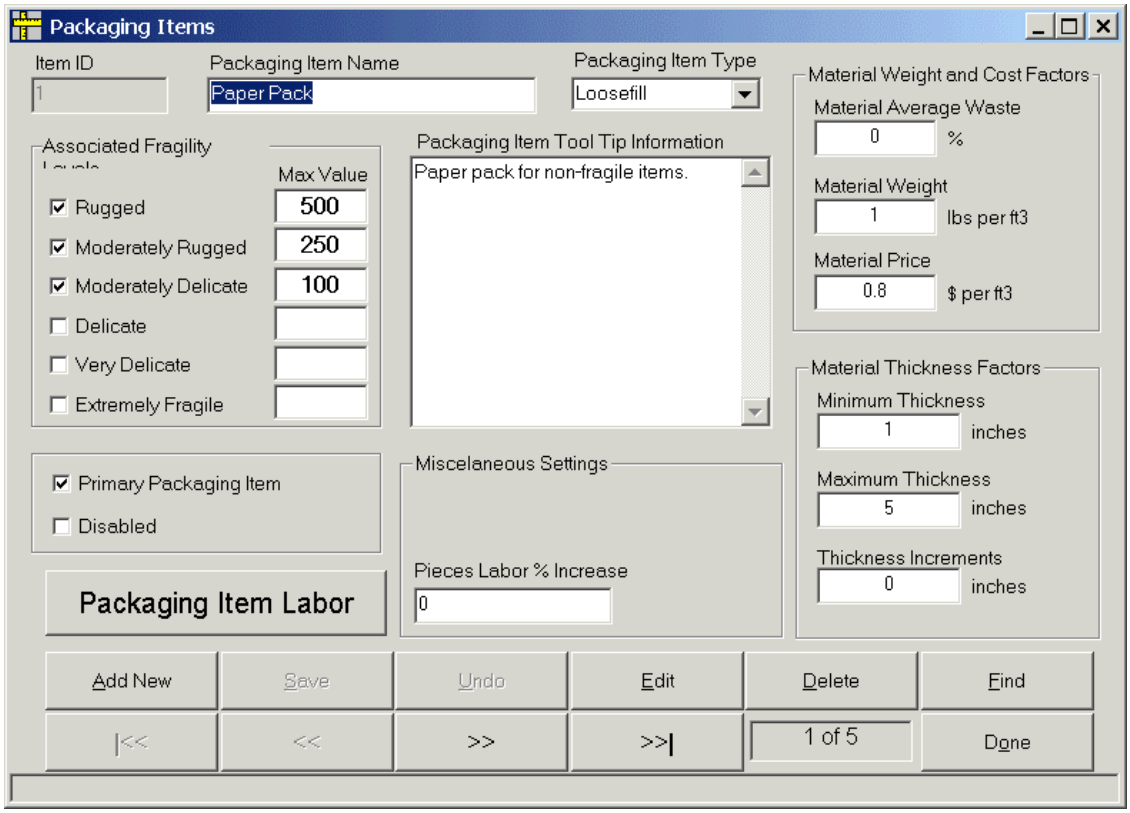
Retail Price

This field is only for the Stock Container Type. This is the Retail Price of the stock container being configured.

Packaging Items

Configuring Packaging Items

Packaging Items can be added, edited or deleted. It is important that packaging items are properly setup. To get to the Packaging Item configuration screen select Tools on the Main Menu bar, then select Configuration, and then select Packaging Items. The individual options and settings are described below. If you have a touch screen then just touch the area with your finger.


Packaging Items
Item ID
1
Packaging Item Name
Paper Pack
Packaging Item Type
Loosefill
Material Weight and Cost Factors
Material Average Waste
0
%
Material Weight
1
lbs per ft3
Material Price
0.8
$ per ft3
Associated Fragility
Max Value
Rugged
500
Moderately Rugged
250
Moderately Delicate
100
Delicate
Very Delicate
Extremely Fragile
Packaging Item Tool Tip Information
Paper pack for non-fragile items.
Material Thickness Factors
Minimum Thickness
1
inches
Maximum Thickness
5
inches
Thickness Increments
0
inches
Primary Packaging Item
Disabled
Miscelaneous Settings
Pieces Labor % Increase
0
Packaging Item Labor
Add New
Save
Undo
Edit
Delete
Find
|<<
<<
>>
>>|
1 of 5
Done

Packaging Item Name

This is the name of the packaging item that will be displayed to the user. No two packaging items can have the same name. The length of the name is limited to 20 characters.

Packaging Item Type

Choose the type of packaging item being configured.

Associated Fragility Levels (Packaging Items)

These settings provide the capability to limit the availability of a Packaging Item based on fragility and value of the item to be packaged. There are 6 fragility levels available that relate to how much force that can be applied to an object before it is damaged:

Rugged, Moderately Rugged, Moderately Delicate, Delicate, Very Delicate, Extremely Fragile

If a fragility level is not checked here then this Packaging Item will not be available when that fragility is selected for an item to be packaged. If a fragility level is selected then the Max Value is used to determine if a Packaging Item will be available. For example:

☒	Rugged	5000
☑	Moderately Rugged	3000
☑	Moderately Delicate	1000
☐	Delicate	0
☐	Very Delicate	0
☐	Extremely Fragile	0

If a fragility of Delicate is chosen for an item, this Packaging Item will not display.

If a fragility of Moderately Delicate is chosen for an item and the value is set to $2000, this packaging item will not display.

If a fragility of Moderately Delicate is chosen for an item and the value is set to $900, this packaging item will display.

If a fragility of Rugged is chosen for an item and the value is set to $4000, this packaging item will display.

If a fragility of Rugged is chosen for an item and the value is set to $6000, this packaging item will not display.

If the Max Value is set to $0 then value will be ignored. Only fragility will be used.

Packaging Item Tool Tip Information

Information entered here will display if you hold the mouse pointer over a Packaging Item displayed on the main screen.

Primary Packaging Item

When the available Packaging Item selections are displayed only one Primary Packaging Item can be selected. You can not combine Primary Packaging Items when performing a packaging job. At this time all the available Packaging Item Types should be setup as Primary Packaging Items. At this time we do not have add-on Packaging Item options such as liners. For example when these are added you will be able to select bubble pack and then add to that a hard board liner.

Disabled

When checked this packaging item will not be used by the application.

Labor (Packaging Items)

This button takes you to a screen that allows you to set up a table that is used to calculate labor minutes needed for this packaging type. The table lets you set up the number of minutes versus the volume (cubic feet) of the required packaging. You can have as many entries as you want here. When the labor calculation is performed the cubic feet of the required packaging is calculated and then the labor is calculated by interpolating the value using the table entries that is above and below the required packaging volume. For example if you have table entries of 10 cubic feet, 20 minutes and 20 cubic feet, 30 minutes and the packaging being calculated has a volume of 15 cubic feet, then the labor will have a value of 25 minutes. This is because the volume was exactly half way between 10 and 20 cubic feet, so the labor would be exactly half way between 20 and 30 minutes.

Material Average Waste (Packaging Items)

This is the percentage of the material for this packaging item that is wasted.

Material Weight (Packaging Items)

This is the weight of the material for this packaging item. It is entered as pounds per linear foot (wrap) or cubic foot (Loosefill and Foam).

Material Price (Packaging Items)

This is the price to be charged for the material used in this packaging item. It is entered as pounds per linear foot (wrap) or cubic foot (Loosefill and Foam).

Minimum Thickness (Packaging Items)

This is the Minimum Thickness allowed for the Packaging material. It is entered as inches. For ½" Bubble Wrap you might enter 1.0 if the minimum amount of Bubble Wrap you want used is 2 layers. For Foam 2.0 would be appropriate since less than this is difficult to accomplish.

Maximum Thickness (Packaging Items)

This is the Maximum Thickness allowed for the Packaging material. It is entered as inches. For example if you want to limit the use of 0.5” Bubble Wrap to 8 layers then you would enter 4” inches. If the system calculates that more thickness is required than what is entered here, then this packaging item will not display.

Thickness Increments (Packaging Items)

Basically, this is the thickness of the packaging material, i.e., the thickness that the packaging material adds per layer. This setting is used to set the increment that the packaging thickness is increased, as the program requires more packaging thickness. It is entered as inches. For example, if the program determines that 2.25 inches of packing is needed, and you select a packaging option with 0.5 set as the packaging increment, then the packing space will be increased to 2.5. This will happen because you have indicated that this packaging can only increase in thickness by 0.5 inch increments, i.e., it is impossible to obtain 2.25 inches in 0.5 inches increments. For packaging like Bubble Wrap and Styrofoam sheets, you should use the thickness of the material. For materials like foam-in-place and loosefill, a good number would be 0.1 or 0.25 inches, because this is not a fixed thickness since the amount used varies.

Miscellaneous Settings (Packaging Items)

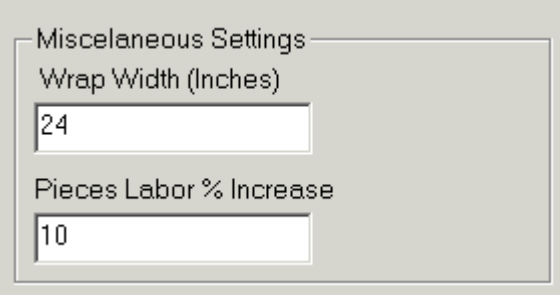
This section will change depending on the type of packaging being configured. Go to the following topics for the specific sections.

Foam

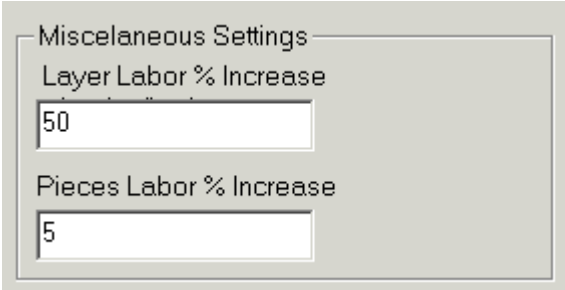
Loosefill

Wrap

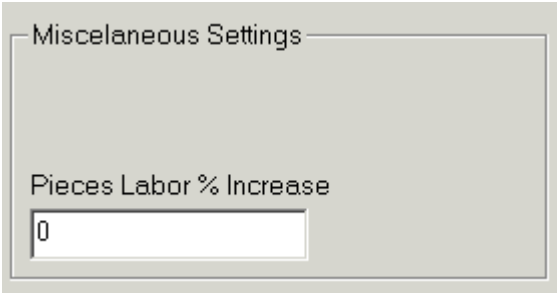
Wrap Specific Settings



Foam Specific Settings



Loosefill Specific Settings



Wrap Width

On Wrap Packaging Type this specifies the width of the wrap. For example ½ inch Bubble Wrap would normally be 24 inches here.

Layer Labor % Increase

On Foam Packaging Type when more than one layer is specified, this is the % multiplier on labor for all layers after the first. For example if you have entered 20% here and 3 layers are specified then the labor would be increased by 40%.

Pieces Labor % Increase

When more than one piece is being packaged, this is the % multiplier on labor for all pieces after the first. For example if you have entered 5% here and 3 pieces are being packed then the labor would be increased by 10%. On Foam Packaging Type you also have Layer Labor % Increase to set. In this case the Pieces Labor % Increase is for each piece beyond 1 per layer.

Fragility List

Fragility List

The Fragility List is the list that drops down when you select the Fragility drop down on the main screen. You can enter Items of all types and specify what the fragility of that item is. This will make it much easier for the user to determine fragilty because this list would provide examples to compare to.

Item – This is the name of example items that you want to list.

Fragility - This is the fragility of the particular example item.

Display Order – This entry lets you specify the display order of each item within a fragility level.

Box Only should be listed once. This lets you indicate that all you want to do is specify a box with no packaging.

Miscellaneous

Miscellaneous Settings

Company Information – The name, address, and phone number fields are for your company information. This information will print on the Customer Quotes.

Labor Rate – This is the labor rate that customers will be charged for labor.

Drop Height Increase – These settings are for configuring how item value affects packaging. When the value of an item is greater than the value configured here the drop height used in the packaging calculations is increased by the corresponding value. You can configure two levels if you desire. Four inches is a good value if you are setting up both levels. If you are going to set up one level six inches is a good number. The value you use is really up to you. $1000 and $4000 are good numbers for the two levels.

Corrugated Sheets

Corrugated Setup

This screen is for configuring the corrugated sheets available for constructing corrugated containers.

Name – The unique name that describes the corrugated sheet.

Thickness – The thickness of the sheet in inches.

Width – The width of the sheet in inches.

Length – The length of the sheet in inches.

Sheet Weight– The weight of the whole sheet in pounds.

Sheet Cost– The cost of the whole sheet in dollars. This is what customers will be charged.

Plywood

Plywood Setup

This screen is for configuring the plywood sheets available for constructing crates.

Name – The unique name that describes the plywood sheet.

Thickness – The thickness of the sheet in inches.

Width – The width of the sheet in inches.

Length – The length of the sheet in inches.

Sheet Weight– The weight of the whole sheet in pounds.

Sheet Cost– The cost of the whole sheet in dollars. This is what customers will be charged.

Lumber

Lumber Setup

This screen is for configuring the lumber available for constructing crates.

Name – The unique name that describes the lumber.

Thickness – The thickness of the lumber in inches.

Width – The width of the lumber in inches.

Sheet Weight– The weight of the lumber in pounds per foot.

Sheet Cost– The cost of the lumber in dollars per foot. This is what customers will be charged.

Networking

Network Configuration

The Network Configuration dialog is used to setup additional computers on a network. This will allow all computers on a single network use a single license registration and a single configuration.

1) First one computer on the network must be licensed. The drive that The Packaging Expert is setup on must be setup as a shared drive on the network.
2) Install The Packaging Expert on all additional computers using the standard install.
3) On each of the networked computers except the main computer that has the licensed version of the Packaging Expert setup a permanent Mapped Network Drive to the shared drive from step 1.
4) On each of the Packaging Experts except the main licensed Packaging Expert go into the Network Configuration dialog and perform the following:
    a) Change the Database Directory to the directory that contains the file “Custom.mdb” on the main computer. This is usually “e:\Program Files\PackExpert” except the drive letter is what ever was used when mapping the shared drive in step 3.

b) Place a check mark beside “Slave Mode. This tell the application that this copy of the Packaging Expert is a slave to the copy installed at the location selected in step 4a.

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