

CargoWiz User's Guide

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Help

Getting Started

Before getting started, you may be interested in viewing a brief demonstration video that provides an overview of CargoWiz. Locate the demonstration video by searching the web for "YouTube CargoWiz Load Planning."

You have probably taken the Tour, which runs automatically the first time you start CargoWiz, and gives an overview of CargoWiz.

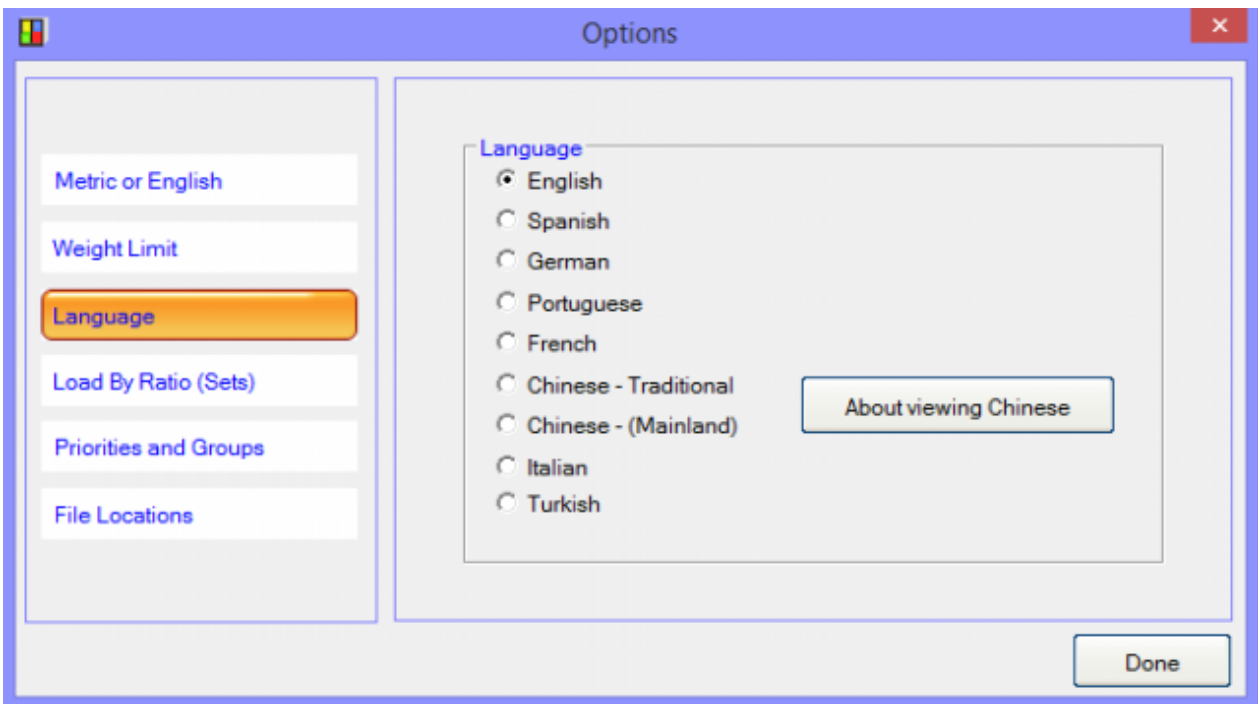
If not, or if it has been awhile, you can tour again. Look for Quick Tour on the Main Menu under Help.

Setting Your Preferences

Choose your preference for either Metric or English measurement. To do so, click "Options" in the main CargoWiz toolbar. Choose the "Metric or English" button, click Metric or English, and click the "Done" button.



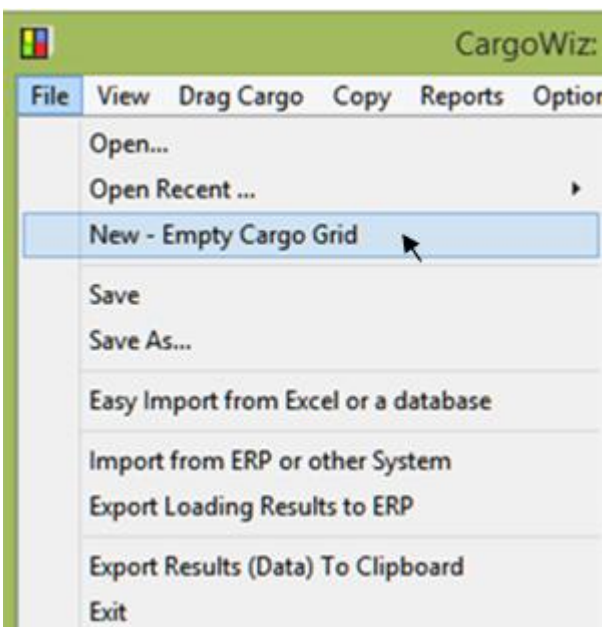
Choose your language preference under "Options." Click the "Language" button, choose your preferred language, and click "Done." Using this procedure, you can change languages at any time. When changing between Chinese and other languages, click the "About viewing Chinese" button for additional information.



Getting started with your data

Once generally familiar with CargoWiz the procedure for most customers, such as manufacturers is:

1. **Choose or enter truck/container data.** You will find CargoWiz contains many popular truck and container sizes and you need only click on one. You may also add trucks and containers with other dimensions if needed.
2. **Enter your cargo data.** When you look at the cargo grid under the Cargo Size tab #2 you will see it already has data that we provide for demonstration purposes. The next step is to clear this grid to make it ready for your data. Do this with "File", "New - Empty Cargo Grid"



Clicking the above selection will clear the grid, except for the top row which is retained as a guide. However you may type over the data to put in your own:

Tip: Hover mouse over column heads for Cargo Grid requirements.

| Required | | | | | | | |
|----------|-------------------------|-----|-------------|------------|-------------|----------------------|---------------------------------|
| | Part Number or Short ID | Qty | Length (In) | Width (In) | Height (In) | Orientations Allowed | Description |
| | 12345 | 100 | 30 | 30 | 30 | 2 | Example row, you may type over. |
| * | | | | | | | |

If you have cargo data in Excel or a common database there is a cut and paste type procedure available. (See "How Do I...", "Manage Cargo," "Import From Excel") to quickly bring in rows and columns of cargo data.

3. **Create a load.** Click tab 3, then click the "Load First Truck/Container/Pallet" and a load will be created.

There is more information on cargo data entry elsewhere in this Help file:

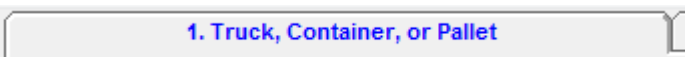
[2. Entering Cargo Data](#)

After creating a load you can do things like:

- **Create reports**, including Step-by-Step graphical images to help loading personnel.
- **Explore the loaded cargo**, labeled with their Part Numbers or Descriptions. See "View," "Alternate Views with Labels" on the menu.
- **Use Drag and Drop** to rearrange the cargo placements. See "Drag Cargo" on the menu.

Tab 1. Truck/Container Data

These operations are performed while on the "Truck Size" tab.



You have a choice to make.

You can use one of the default truck/container sizes we have provided.

OR

The yellow and blue grid area accepts user inputs or write-overs so you can enter your own. This is usually done by adding to the bottom of the table. You can click in the bottom row, or, if you hit the "Add Row" button it will place your cursor there.


You can also overwrite existing entry's, or delete.

About the "To Use" columns:

The "To Use" values are the dimensions used by the program when fitting cargo. This gives you the chance to allow for **tilted cargo, maneuvering room, imperfect containers and other problems**. Some users successfully use the full advertised internal dimensions, others do not.

How to choose the truck/container to use:

The program uses the truck/container in the grid row which has the black triangular pointer. Just click anywhere in the row of the one you want

| | Description | Length (In) | Length To Use (In) |
|---|-----------------------------------|-------------|--------------------|
| | 53' High Cube Dry Container (USA) | 630 | 630 |
| | 48' High Cube Dry Container (USA) | 570 | 570 |
| | 45' High Cube Dry Container | 535 | 535 |
| | 40' High Cube Dry Container | 474 | 474 |
| | 40' Std. Dry Container | 474 | 470 |
| | 20' Dry Container | 232 | 232 |
|  | 55' Our Company Truck #1 | 570 | 566 |
| | 48' Truck - Dry Van | 567 | 567 |

Multiple Truck Shipments - Using a combination of Truck Sizes

You may change the truck/container size between truck loading sequences.

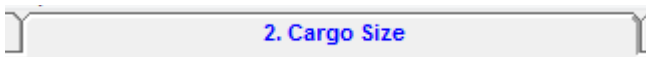
For example, you have used the "Load First Truck" button to create a load plan in a 40' truck and see that there is still about 1/3 of the cargo left out. Proceed to the "Truck Size" tab, select, perhaps a 20' truck.

Then return to the "Load Truck" tab and proceed by clicking "Load Next Truck".

This powerful capability lets you optimize your truck/container selections.

Tab 2. Entering Cargo Data

These operations are performed while on the "Cargo Size" tab.



This is where you enter fundamental data about your cargo. This is an important topic area, worth a few minutes of your time. We often refer to this and the truck information as "**The Database**".

Choices for populating the cargo grid:

1. Click on grid cells and **type in your data**. If the number of different cargo items is modest this is the simplest way to go.

or

2. Click "**File**", "**Easy Import**" and let our **Import Wizard** help you bring in your data from another source, such as **Excel**, or a database like **Access** .

CargoWiz: Sample Large Cargo, Help.mdb into 40' High Cube Dry Container Length: 474 Width: 92 Height: 106

File View Drag Cargo Copy Reports Advanced Tools Options Help

1. Truck, Container, or Pallet 2. Cargo Size 3. Load Container

Tip: Hover mouse over column heads for Cargo Grid requirements.

| Required | | | | | | | Not Required | | | | | Total Units |
|-------------------------|-----|-------------|------------|-------------|----------------------|-------------------------|---------------|--------------------------|---------------------------|---------------------------|------------------------------|-------------|
| Part Number or Short ID | Qty | Length (in) | Width (in) | Height (in) | Orientations Allowed | Description | Max Can Stack | Bottom Only | Loading Priority or Group | Weight of Cargo Item, lbs | Units Inside this Cargo Item | |
| MK334 | 122 | 10 | 15 | 10 | 2 | Mess Kits, one per box | 2 | <input type="checkbox"/> | 1 | 22 | | |
| BG409 | 45 | 15 | 25 | 20 | 6 | Hiking Boots | 2 | <input type="checkbox"/> | 1 | 17 | | |
| PT1092 | 43 | 54.7 | 35 | 10 | 6 | Pup Tents | 3 | <input type="checkbox"/> | 1 | 25 | | |
| TP189 | 25 | 90 | 25.3 | 16 | 6 | Tent Poles | | <input type="checkbox"/> | 1 | 32 | | |
| Stakes1834 | 24 | 25 | 41.7 | 39 | 6 | Tent Stakes | | <input type="checkbox"/> | 1 | 22 | | |
| UT12-12 | 9 | 45 | 26 | 32 | 6 | Umbrella Tents, 12 x 12 | | <input type="checkbox"/> | 2 | 42 | | |
| * | | | | | | | | <input type="checkbox"/> | | | | |

How to Type in your data

There are details about what is permissible or advisable for each column that you should review. These details are also available by hovering the mouse over the column head in the grid.

Part Number or Short ID

Required. Numbers and/or letters permitted.

Qty

Not required when creating the database of cargo, as the program will set it to zero for now and you can set later as needed for actual shipments.

Length, Width, Height

Required. Usually even numbers, but decimals are permitted, like 27.375.

Length is in the truck-length direction.

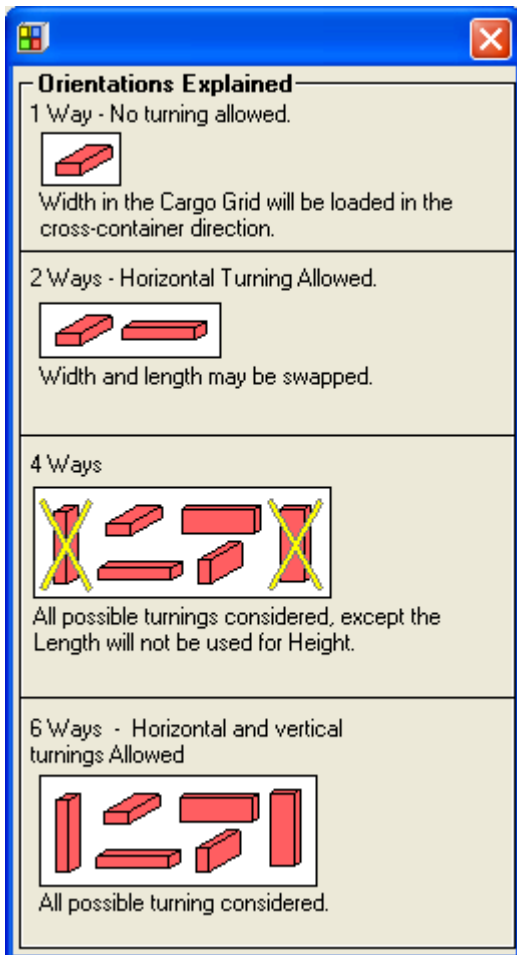
Width corresponds with the cross-truck direction.

Height is toward the roof.

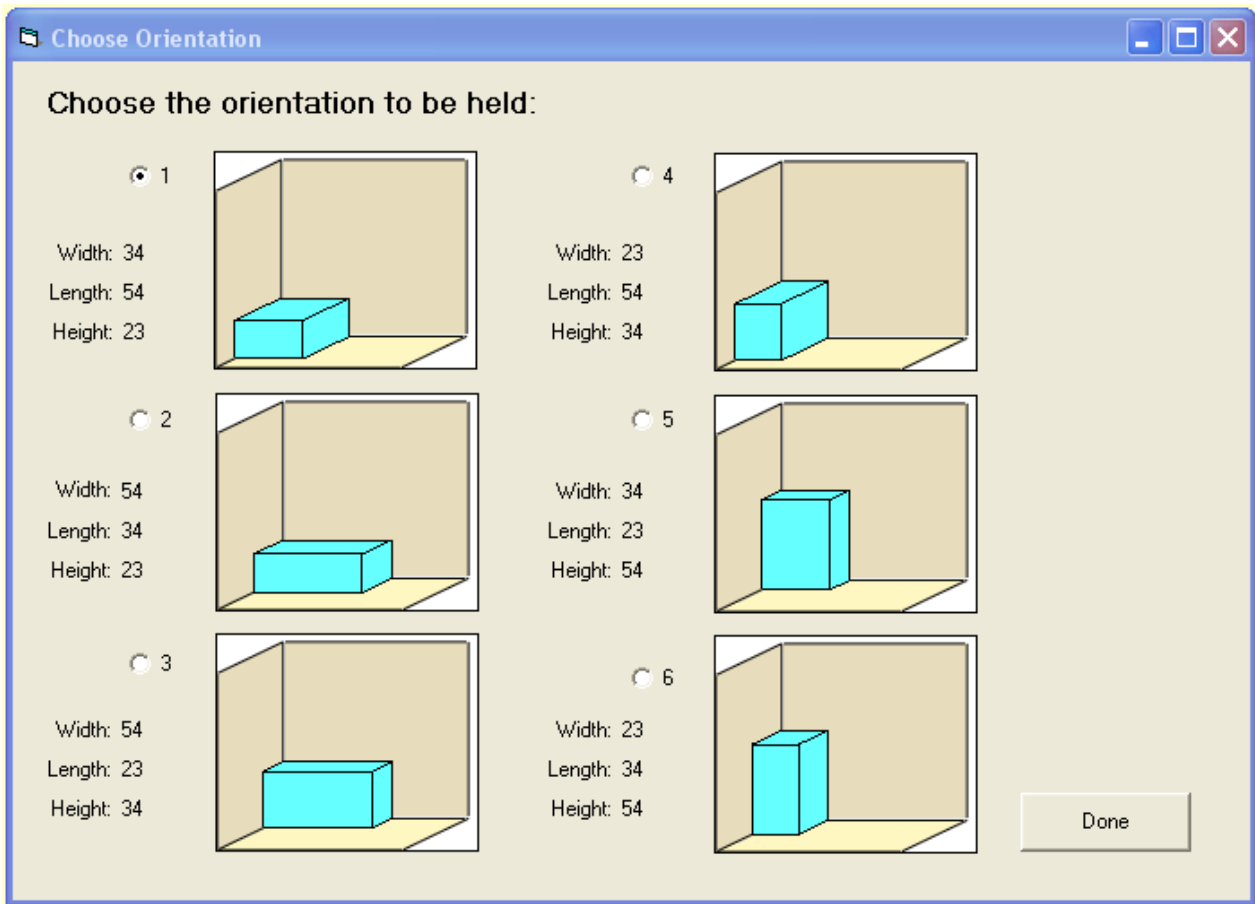
The value you assign to which direction has no effect if you select the option for "Allow All Turnings" but has effect in the "Allow Horizontal Turnings" or "Allow No Turnings" options.

Cargo Orientations Allowed

Required. For each Cargo type you may set the allowed orientations. For instance, a furniture manufacturer might want tables to be kept legs down, while permitting small chairs to be any orientation. The entry may be either the number 1, 2, 4 or 6. A click on the "Show Me..." button at the column head reveals the following image in order to explain what these orientations mean.



If you choose 1-Way the cargo will be held as shown in the grid, that is, the width will be in the cross-truck direction. Selecting 1-Way brings up the "Choose Orientation to be held" graphic dialog box. If you select a new orientation it will swap the values in the grid as needed.



Description

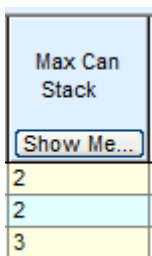
Not Required, but usually filled in.

Max Can Stack

Not Required. Most users let the program figure out how many will fit without going through the roof. But there are also many situations where there are compression loading weight concerns.

Max Can Stack refers to the number of identical cargo items that can be stacked, including the base cargo item. So a Max Can Stack of 3 means there will be a total of 3 items in the stack.

Click on the "Show Me" button in the Max Can Stack column heading to access a full description.



Note that if a Max Can Stack value is set, and that value is accomplished in the load plan generated, other types of cargo may be placed on top unless specifically prohibited by setting "Taboo-On-Top" for this cargo. Use this link for more about [Taboo-On-Top](#).

Bottom Only

Not Required. Usually left unchecked. If checked the cargo will only be loaded on the floor (bottom) of the truck/container. Note that other cargo items may be stacked on top of it unless limited using "Taboo-On-Top" for this cargo. About [Taboo-On-Top](#)


Loading Priority or Group

Not Required. This permits control of the loading order, as might be useful for a distributor with multiple stops. More than one row may be given the same priority number to create groups with the same loading priority.

Weight

Not Required. If used, usually even numbers are entered, but decimals are accepted.

Units Inside this Cargo Item and Total Units

Not Required. 

| | | | | |
|-----|----------|------------------------------|----------|-------------|
| Qty | X | Units Inside this Cargo Item | = | Total Units |
| 180 | | 10 | | 1800 |

CargoWiz and the shipping department are concerned with the cargo item to be loaded, such as a box, which perhaps contains 10 bags of dog food. But often customers and the sales department deal in terms of the units, such as the dog food bags themselves. If you fill in a value for **Units Inside This Cargo Item**, CargoWiz will do the multiplication and show the **Total Units** in the column to the right.

Tip: You can hover on a column head

And you will get essentially the above comments displayed.


Pre-Trial Estimate of Truck/Container Space needed

The purpose of the display is to save time (spent doing experimental load trials) mostly for the case of attempting to perfectly fill one truck or perfectly fill multiple trucks.

The calculation takes the Cargo grid information and determines the volume needed for the Qty shown. It compares this to the volume of the selected truck. However, it knows cargo is rarely dimensioned so that it can perfectly fill all the space and so it analyzes the load and makes an estimate of how well it will compact. After a load has been created it uses the compaction archived to make a smarter estimate.

If you change quantities or sizes in the grid you need to click the Refresh button to update the info. However, if you run a trial or change truck size it refreshes automatically.

Shipment Summary and Pre-Trial Estimate of Space Needed

| | | | | | |
|-----------------|--------|--|------------|------|--|
| Total Quantity | 356 | | Containers | .93 |  |
| Different Items | 5 | <input type="button" value="Refresh"/> | Feet | 36.3 | |
| Weight, lb | 29,524 | | | | |
| Volume, Cu. Ft. | 1,963 | | | | |

This is an Estimate Only of Space Needed. A load trial must be run for true results.

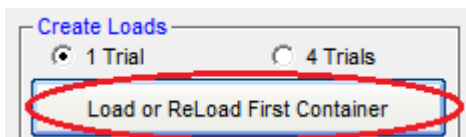
Tab 3. Create a Load Plan

These operations are performed on the "Load Container " (or "Load Truck" or "Load Pallet") tab.



For simplicity, the examples here are for a container. Loading a Truck or Pallet works the same way unless noted.

Generally, the container and cargo information having been established, you just click the "Load or Reload First Container" button.



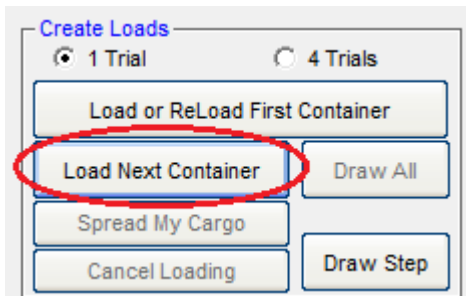
What to Do Next

Users have different goals:

A. **Fill one container** as tightly as possible, with the freedom to vary the cargo.

In this case, make quantity adjustments by returning to the cargo tab, then try again.

B. **Use multiple containers as needed.** In this case, **if there is left out cargo** from the previous load plan, the "**Load Next Container**" button becomes available. Clicking it continues with another container. It may be of different size if you change it before loading.



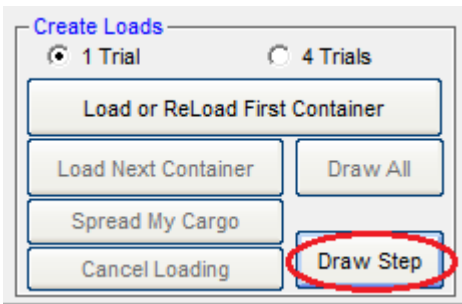
When the load is complete you may print a report. (Menu bar - "Reports")

For more information on reports available from CargoWiz, follow this link to the ["Reports"](#) section of the Help File.

How to See More:

You may also get a left view of the 3D image. (Menu bar - "View", "View From Left")

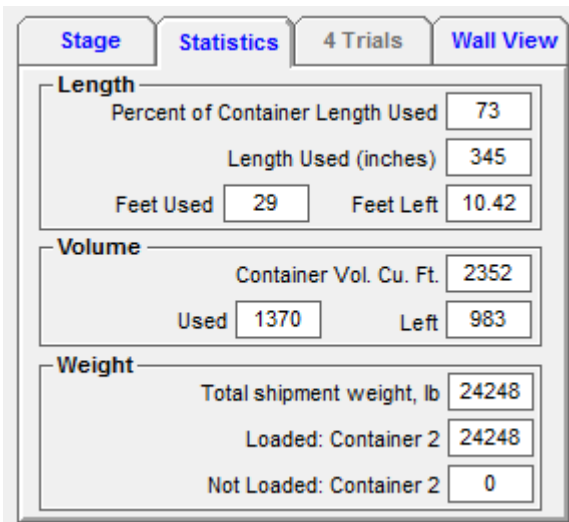
You may also view sequential steps of the Load Plan to see cargo that may be concealed



The "Draw All" button will draw the complete Load Plan with all steps, as it was before Draw Step was first clicked.

About Statistics

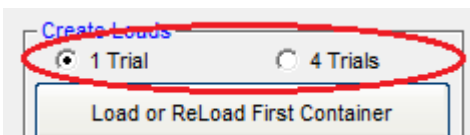
After the container is loaded, statistics for the shipment are presented on the "Statistics" tab.



Note that dimensions used are from the "To Use" Container dimensions, which may be less than the true inside dimensions. The user should review these numbers with consideration of "squashing" tilting, etc. of the cargo.

Improving the Load Plan

For speed of loading, the number of trials is set by default to one:



However, **many loads can be improved, typically by a few percent** less floor length taken, by having the program do **4 trials**. Only experience with your loads will teach you what is best for you.

Results of each trial are displayed.

| Stage | Statistics | 4 Trials | Wall View | |
|----------------------|------------|----------|-----------|-------------|
| Trial Results | | | | |
| | 1 | 2 | 3 | 4 |
| Vol. Used % | 89.3 | 90.2 | 89.0 | 92.7 |
| Compact % | 89.6 | 90.5 | 89.8 | 92.7 |
| Loaded | 192 | 198 | 188 | 259 |
| Left Out | 268 | 262 | 272 | 201 |
| Load Length | 469 | 469 | 466 | 470 |
| | | | | ↑ Shown |

The program selects the best, shown in bold, and recreates the load.

The basis for determining the "best" has two cases.

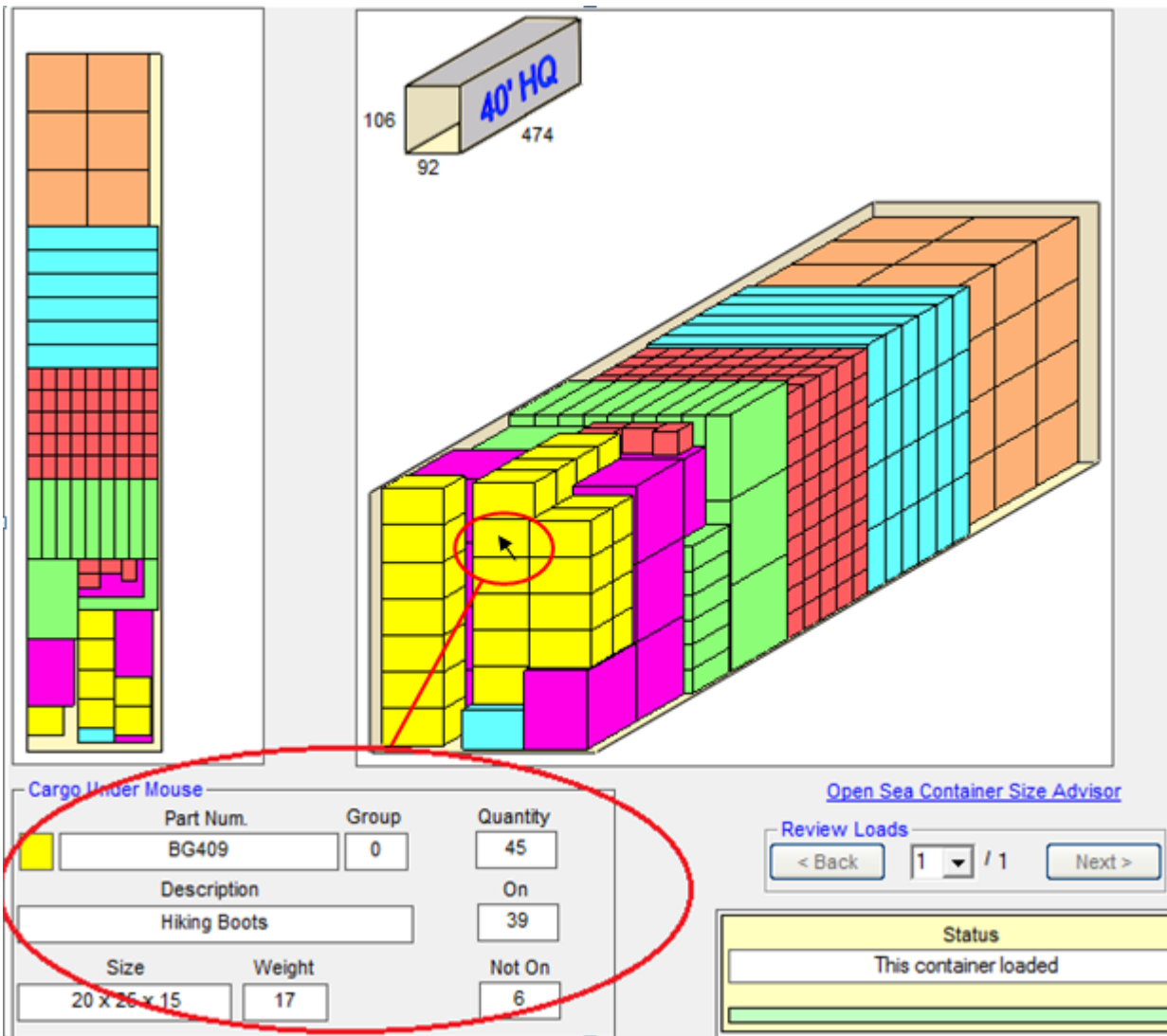
1. **The cargo did not fill the truck.** In this case the best load is determined based on which took up the **least length of truck**. (Compact % = length taken by cargo/"Length to Use" of truck x 100).
2. **The cargo did not all fit in the truck.** In this case the best is selected based on the trial which fit the **most volume of cargo into the truck**. (Volume Used % = Volume of cargo in truck / "To Use" volume of truck x 100).

The program changes some major conditions to create the different trials, but understand that there are many sub trials and the actual number of possibilities tried can be in the millions.

Identifying Cargo

Cargo Under Mouse is a unique feature of our program that is a major advancement over other systems that attempt to label the cargo image directly with just a part number, which must be cross referenced by the user for more details.

Simply hover the mouse pointer over the cargo of interest and it displays cargo information.



You can also see an image of the loaded container with labels by clicking "View" on the main CargoWiz menu. From the drop-down menu choose "Alternate Views with Labels."

Controlling the Loading Order

Most users will not need to use this feature. It is available in case you wish to have control over the sequence of loading.

It can be used if you wish to:

- Have some item (or group of items) loaded first, or last.
- For Multiple Stops, as might be used by a distributor making deliveries in a particular order.

- To Prioritize, thus making sure some items are not left out of the load if space is insufficient for all items.
- To create "fillers" to take up any available space. By having the last group contain an abundance of small items, and by setting "Mix" (with previously loaded items, the small items will take up any available space.

Procedure for Creating Groups

Loading order, priorities or groups can be established by placing numbers in the "Loading Priority or Groups" column of the Cargo Size tab. **It is not necessary to enter anything in this column if you have no need to prioritize or load by groups.**

| 2. Cargo Size | | | | | |
|--------------------------|-----------------------|---------------|--------------------------|---------------------------|---------------------------|
| ----- Not Required ----- | | | | | |
| Orientations Allowed | Description | Max Can Stack | Bottom Only | Loading Priority or Group | Weight of Cargo Item, lbs |
| Show Me... | | Show Me... | | Show Me... | |
| 2 | Mess Kits, one per bc | | <input type="checkbox"/> | | 22 |
| 6 | Hiking Boots | | <input type="checkbox"/> | | 17 |
| 6 | Pup Tents | | <input type="checkbox"/> | | 25 |
| 6 | Tent Poles | | <input type="checkbox"/> | | 32 |
| 6 | Tent Stakes | | <input type="checkbox"/> | | 22 |
| 6 | Umbrella Tents, 12 x | | <input type="checkbox"/> | | 42 |
| | | | <input type="checkbox"/> | | |

To create groups and specify a loading order (for stops, deliveries, or to control loading/unloading order)

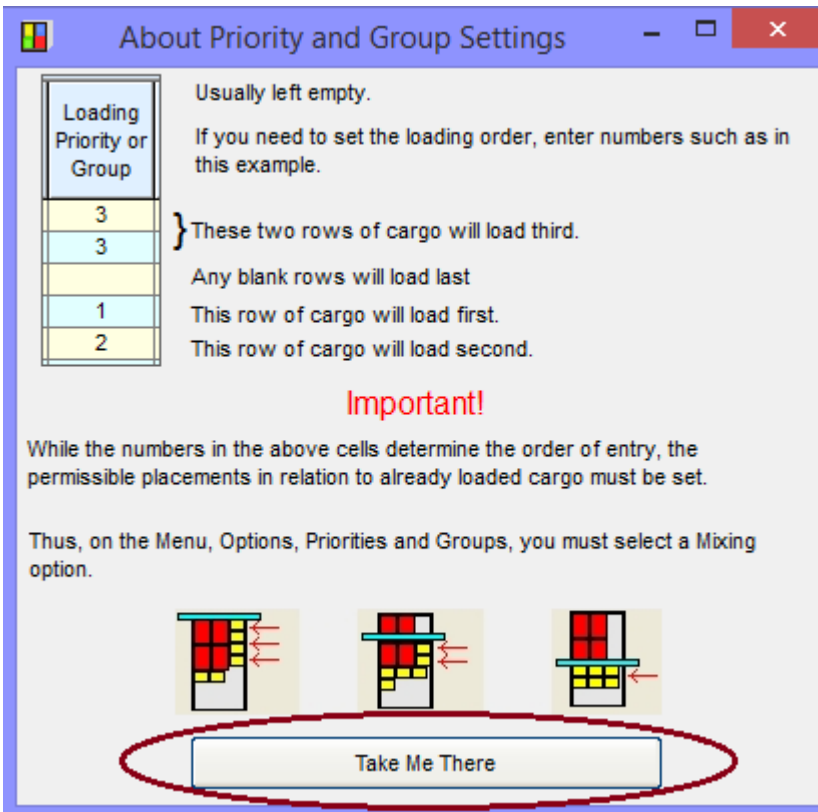
Type a number in the Priority and Group column that represents the cargo row's load group.

Assign that same number to other members of that same load group.

Typically the result may appear out of sequence, but it will load correctly:

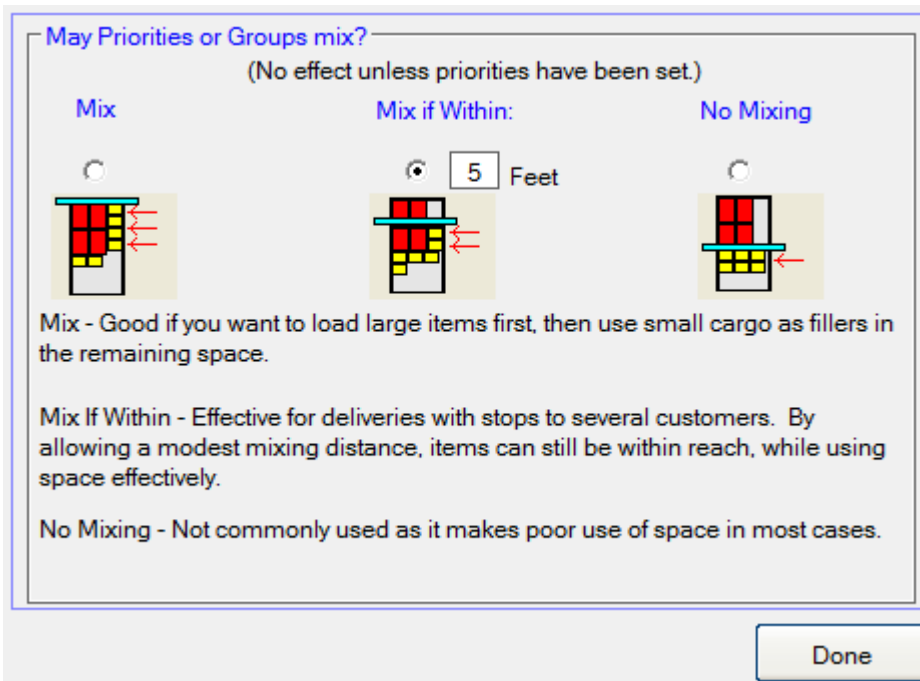
| Loading Priority or Group |
|---------------------------|
| Show Me... |
| 3 |
| 1 |
| 1 |
| 4 |
| 4 |
| 2 |

Assistance is available by clicking the "Show Me" button on the Loading Priority or Group column. This opens a window describing Priority and Group Settings. Along with the sequence of loading, you must also set the degree to which the groups can mix together. To set this option, click on the "Take Me There" Button.

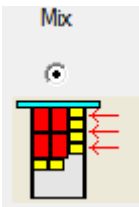


The "Take Me There" button will open the Options window for controlling how groups may mix.

Controlling How Groups May Mix



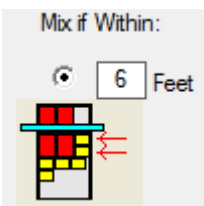
The "Mix" option:



This means, after the first items are loaded, other items may be placed wherever there is space. The illustration is of a case where the red items were loaded first. The smaller yellow items were allowed to be placed anywhere there was room. This could be helpful if you want to reserve small items to fill up any remaining space. But it may not be good if there are multiple stops as some yellow items may not be reachable until the red items are unloaded.

This choice does make good use of available space.

The "Mix if Within" option:



This is typically used to restrict how far the group currently being loaded may mingle with the previously loaded groups. Often it is desirable to have cargo within arms reach or accessible with minimal movement of already loaded cargo groups.

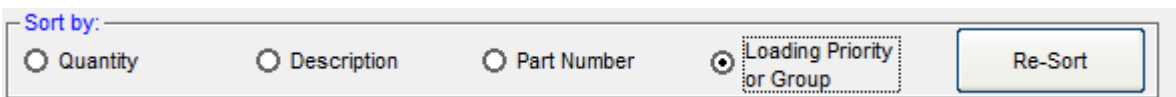
It makes better use of space than the strict "No Mixing" option below.

The "No Mixing" option :



The blue bar represents that the next group must be set totally separate from the first group, as if a curtain type barrier were placed. This could be helpful in assuring that deliveries are made to the right recipient, but may be wasteful of space.

TIP: If you wish to see the groups in order on Tab #2, click the Load Priority or Group option button and click "Re-sort"

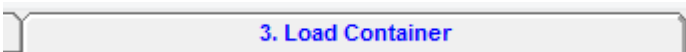


Result:

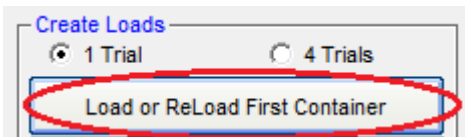
| Loading Priority or Group |
|---------------------------|
| 1 |
| 1 |
| 2 |
| 3 |
| 4 |
| 4 |
| |

Loading the groups

Return to the loading area by clicking the loading tab:



Then begin in the usual manner by clicking the "Load First..." button.

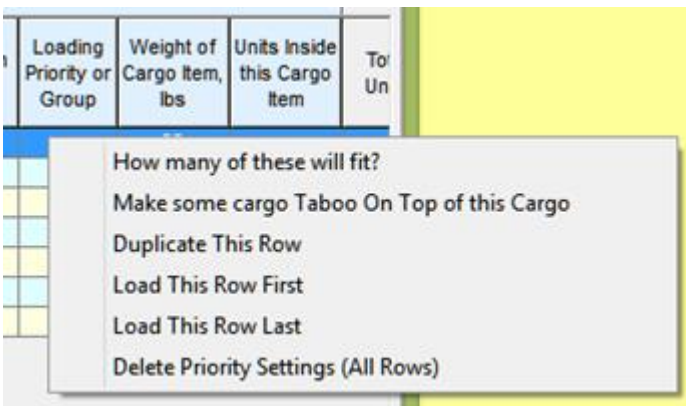


The groups will be loaded in order.

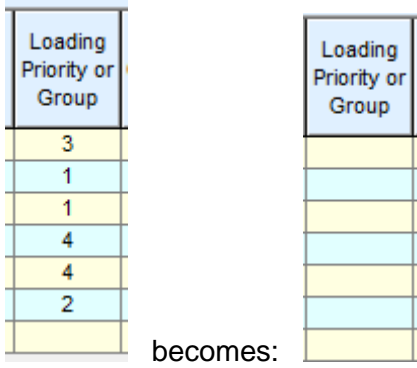


Other right click options:

Duplicate this row- Perhaps you are a distributor and two customers want the same item but it only appears once in your "Master list". Use Duplicate This Row and assign each of the identical rows different Priority or Group numbers.



Delete Priority Settings (All Rows) - This places blanks in all rows in the Priority & Groups column



System Requirements

Minimum Requirements:

CargoWiz will work on essentially any laptop or desktop PC with a Windows operating system, Windows XP or newer.

Some customers are running CargoWiz in a Terminal Services (Remote Desktop Services) environment.

Apple - The computer must be placed in Microsoft Windows mode using Boot Camp or Parallels software, and requires a copy of a Windows OS.

It may be necessary to click on the "+" to open the list of System Administration topics.

Passing and Sharing of Data Files

CargoWiz is designed for installation on each local user's PC.

Once the initial installation(s) are done the following procedure eliminates the need for duplicate entry of data about cargo and trucks. For instance, your company manufactures (or distributes) a line of products packaged in cartons, crates, or on pallets. On one user's machine enter the data for your products under the "Cargo Size" tab, and appropriate data under the "Truck Size" tab as well. Save this file with a name like "Our Company Products".

Then locate this file, usually in:

Windows XP C:\Documents and Settings\\Application Data\CargoWiz\Shipments

Win7 and newer: C:\Users\\AppData\Roaming\CargoWiz\Shipments>

and transfer it to the Shipments folder of the other users, which they can then open. Transfer can be by copy and paste on a network, an email attachment, memory stick or other means.

Should your company add, change, or delete products this same procedure can be repeated.

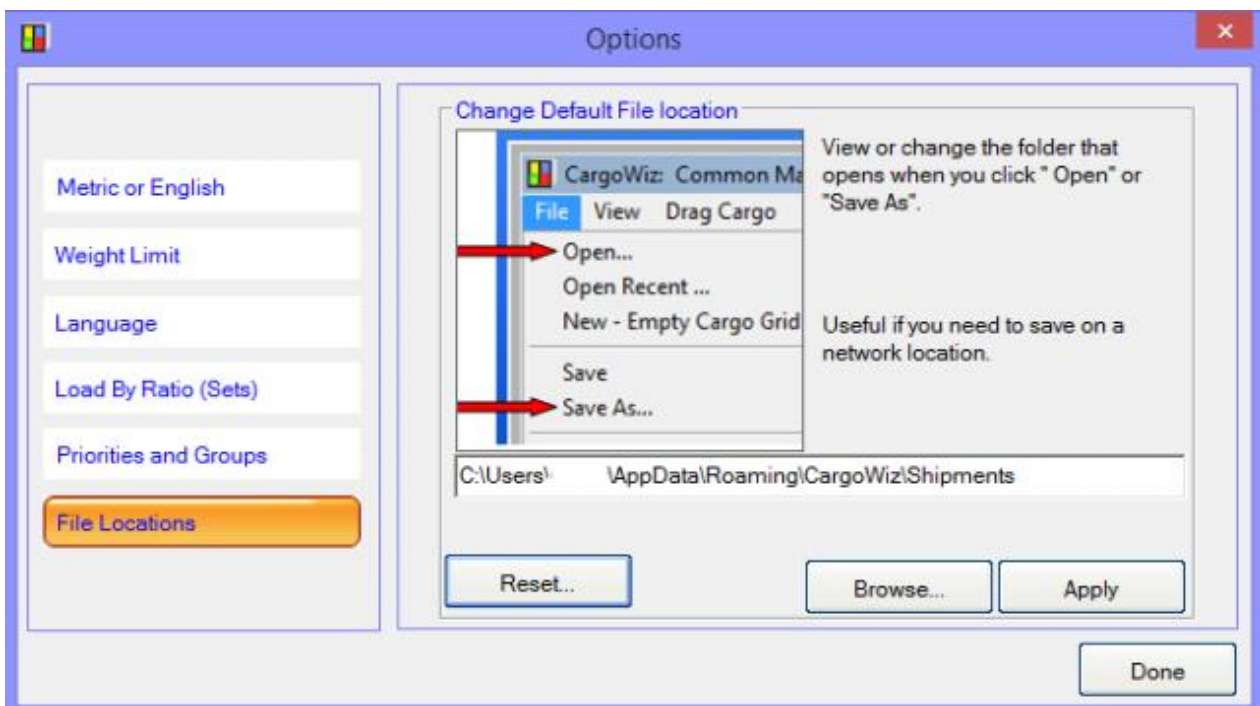
Save to Shared Folder or Location

An alternative is to save the cargo data in a shared folder or on a shared drive. Then each user can change the default location where shipment files will be accessed and saved.

To change the default location click "Options" on the main CargoWiz toolbar.



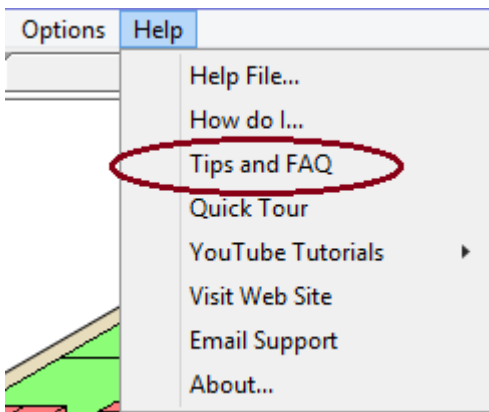
Choose "File Locations." Browse to the desired location and click the "Apply" button. Choose "Done."



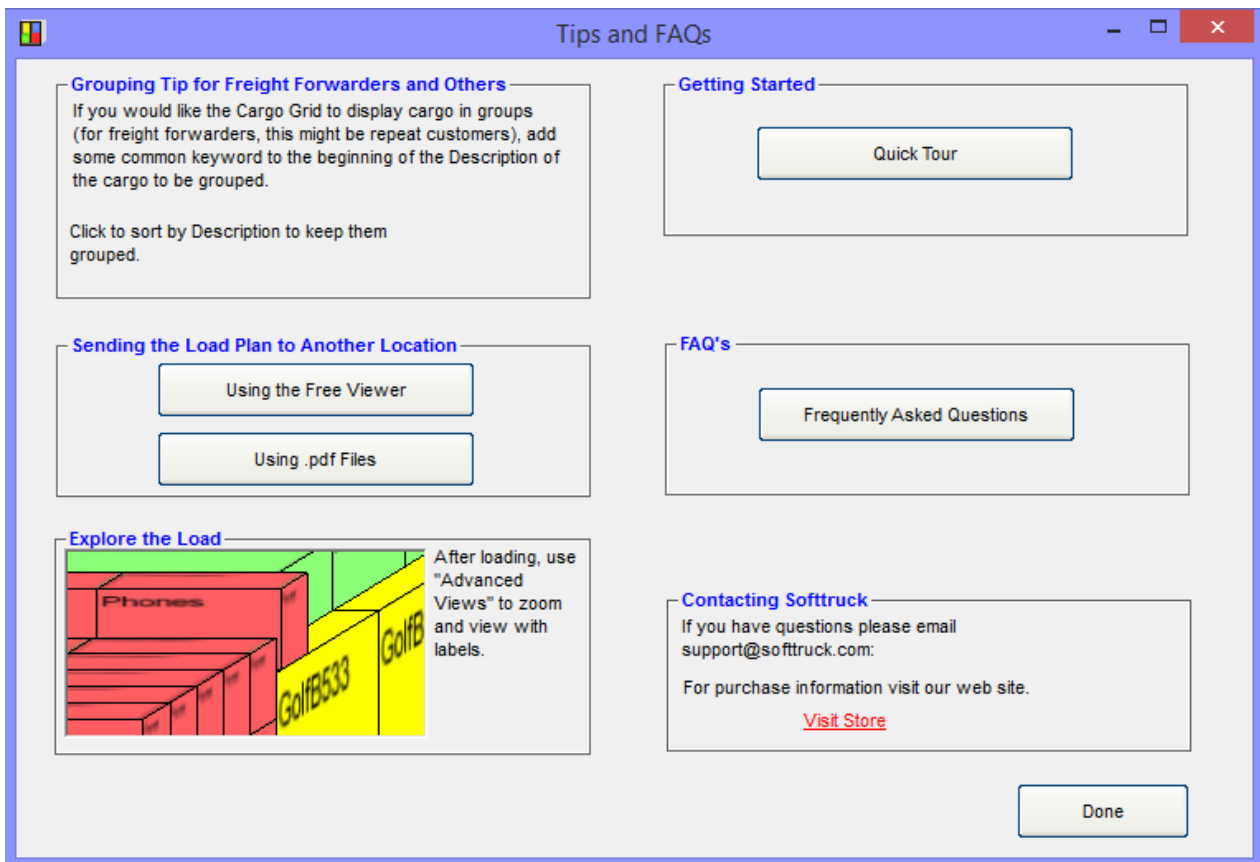
Once the file location is set on the individual user's desktop, they will access the database and their shipment files will be saved to that location.

Tour, Tips, and FAQ's

These topics are accessed from the Help drop-down on the main toolbar.



When the window opens, click on the buttons for additional information.



How Do I...

This section of the Help File is designed to answer the CargoWiz user's question, "How Do I..."

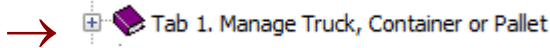
It may be necessary to click on the "+" to open the list of "How Do I..." topics.



Tab 1. Manage Truck, Container or Pallet

This section of the Help File is designed to answer the CargoWiz user's questions regarding how to manage the truck, container or pallet.

It may be necessary to click on the "+" to open the list of Tab 1. Manage Truck, Container or Pallet topics.



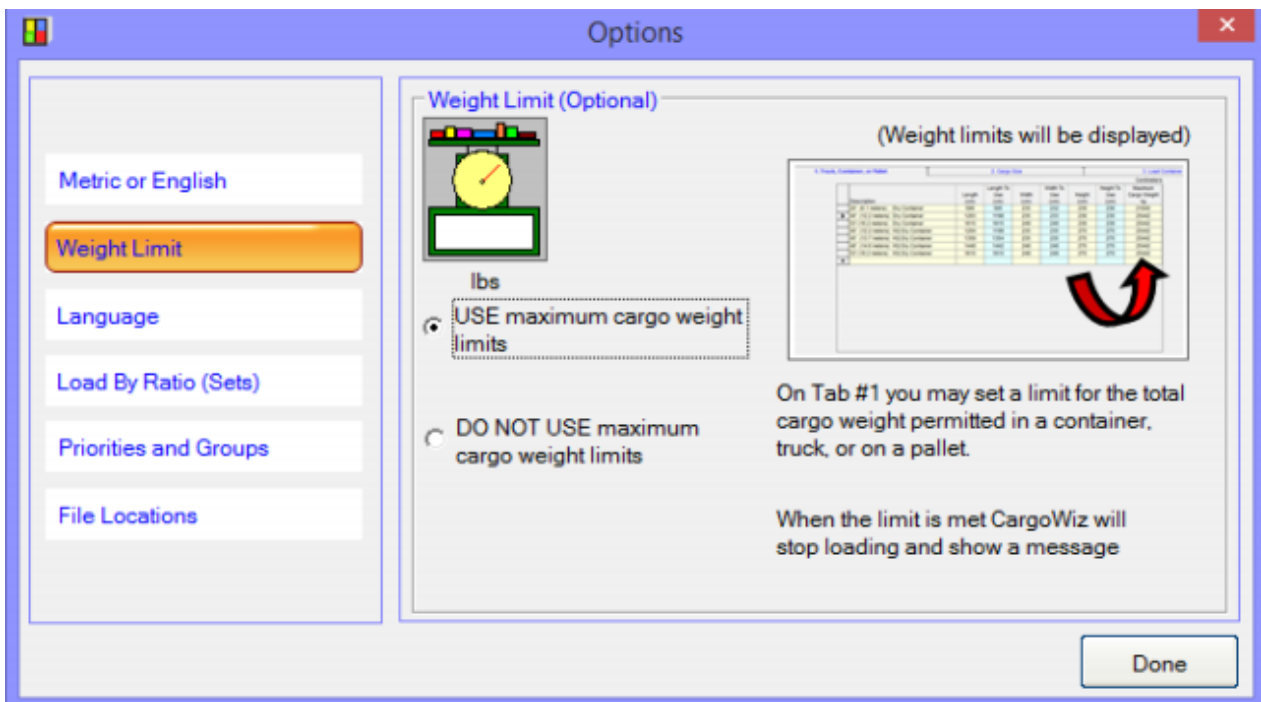
Set Weight Limit

You can set a maximum weight limit per container, truck or pallet for your load. Here are the steps.

In CargoWiz, click on Options in the top toolbar and the Options window will open. In that window choose Weight Limit.



On the center panel of the window, click the button for USE maximum cargo weight limits. Click the "Done" button. Now the "Maximum Cargo Weights" column will be shown on Tab 1.



You can set or change the desired weight in the Maximum Cargo Weight column on Tab 1. Once set, the weight limit will be saved for that truck or container.

| Maximum Cargo Weight (lbs) |
|----------------------------|
| 56,090 |
| 56,090 |
| 56,090 |
| 56,090 |

Note: If you choose the button "DO NOT USE maximum cargo weight limits," the Maximum Cargo Weight column will not appear on the Tab 1 Truck and Container grid.

Add Truck, Container or Pallet to Truck Grid

You can use the truck sizes built into CargoWiz or add your own. This is explained in the Help Section. To see how, follow the link provided below.

[1. Truck/Container Data](#)

Adding Alternative Truck Styles

Flat Rack

CargoWiz can be used to load flat racks, although it was not designed with that use in mind.

The primary method, would be to create a truck with an expanded width to accommodate the size of the cargo to fit on the flat rack. Example: for over-width cargo, the process is:

- Create a Flat Rack on tab #1 by adding it in the last, vacant, row. You can use standard flat rack dimensions to begin with.
- If the case is over-width cargo, then increase the width so the over-width cargo will fit.
- Proceed to load, probably best done using "Drag Cargo" on the menu in order to open the Drag and Drop editor.

Of course the image will not look like a flat rack with overhang, but it does help in determining what will fit on the flat rack.

Multiple Level Trucks (Drop Deck Trailer)

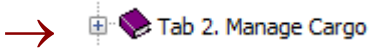
Although drop deck trailers are not built into CargoWiz, it can be done with an extra step on the part of the user. You can make separate "trucks" for each level by putting your own dimensions in the grid on tab #1. When one has loaded, go to tab #1 and select the next one, then back to tab #3 to load.

If there is just one high, short area up front you might try creating a dummy cargo that goes in first, just fits and leaves the right head room. You can give the dummy piece a Priority 1 on the Tab 2 Cargo Grid. That will insure that it is loaded first. For this approach you would have to recognize that the "dummy" piece is not actual cargo.

Tab 2. Manage Cargo

This section of the Help File is designed to answer the CargoWiz user's questions regarding how to manage cargo.

It may be necessary to click on the "+" to open the list of "Tab 2. Manage Cargo" topics.



Import From Excel

This is discussed in this topic:

[Avoid Typing in all My Cargo Info](#)

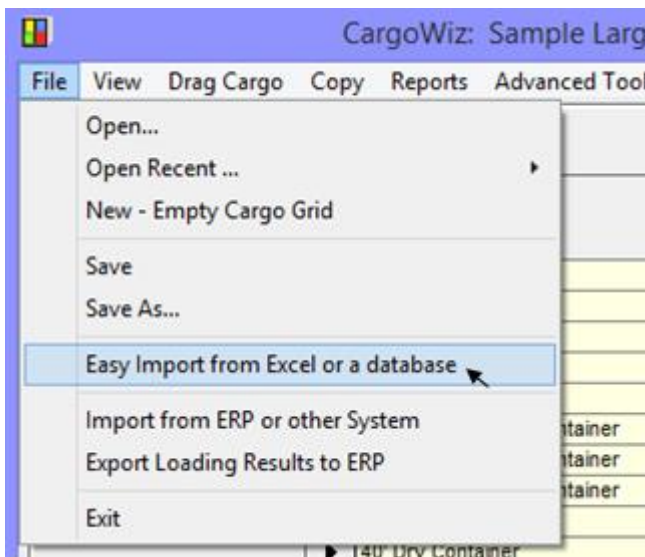
Avoid Typing in all My Cargo Info

Many users, like manufacturers, need only put their data into CargoWiz once, then change the quantity of an item to non-zero if it is on a particular shipment.

The initial entry of data can be a big job and so we have built-in assistance for a "Copy and Paste" type of procedure to quickly bring in data from another source such as an Excel spreadsheet.

You can view a brief demonstration video of "Easy Import from Excel or a database." Locate the demonstration video by searching the web for "YouTube CargoWiz Easy Import."

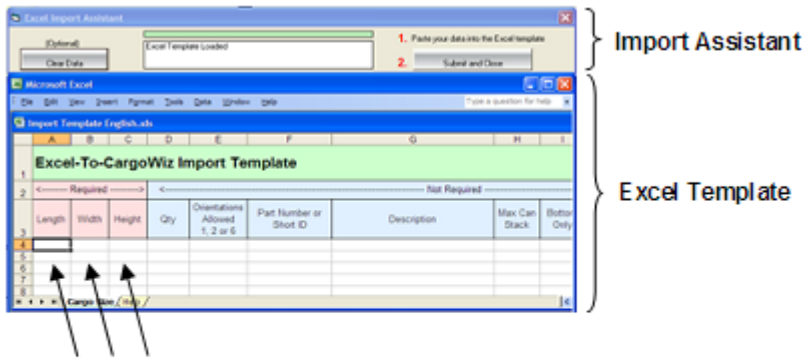
Click "File", "Easy Import from Excel or a database".




To simplify the view, the normal CargoWiz user interface will automatically minimize. (go to the Task Bar)

Excel will then open and display a template that looks much like the grid on the Cargo Size tab.

Above it will be the Excel Import Assistant window.



1. Paste in columns of data copied from your Excel source or database.
2.  Click and your data will be reviewed for suitability.

If approved Excel and the Import Assistant will disappear and CargoWiz will reappear with your data transferred to the Cargo Grid.

Only the first 3 columns, Length, Width, and Height, are required in order to make it quick and easy for those like freight forwarders who may be unconcerned about the other data.

Tip: To choose "Bottom Only" in the Excel Import Assistant, type the word TRUE in the Excel cell.

Avoid Chopped-Off Part Numbers or Descriptions

Make Cargo Columns Wider

If your Part Number or Description is partially cut off you may widen the column by moving the mouse pointer to the column divider in the header. It will turn into a double headed arrow. With the left mouse button pressed you can move the divider by dragging.

| Required | | | | | | Not Required | | |
|-------------------------|-----|-------------|------------|-------------|---------------------------------|--------------|---------------|--------------------------|
| Part Number or Short ID | Qty | Length (cm) | Width (cm) | Height (cm) | Orientations Allowed Show Me... | Description | Max Can Stack | Bottom Only |
| San Ford | 4 | 47 | 99 | 48 | 6 | ROTARY | 4 | <input type="checkbox"/> |

This may cause columns on the right to move out of view but they can be brought back by using the horizontal scroll bar that automatically appears.

Control Turning and Tipping of Cargo

This is controlled by a grid setting:



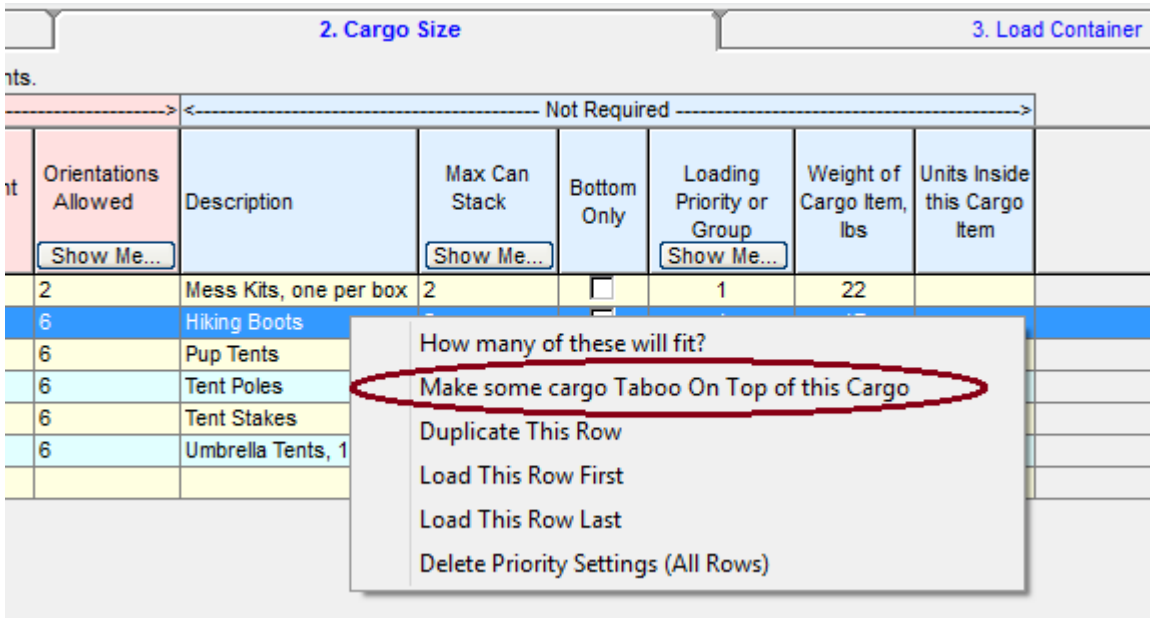
For more information, follow this link to ["Cargo Orientations Allowed."](#)

Control Taboo On Top

Taboo On Top

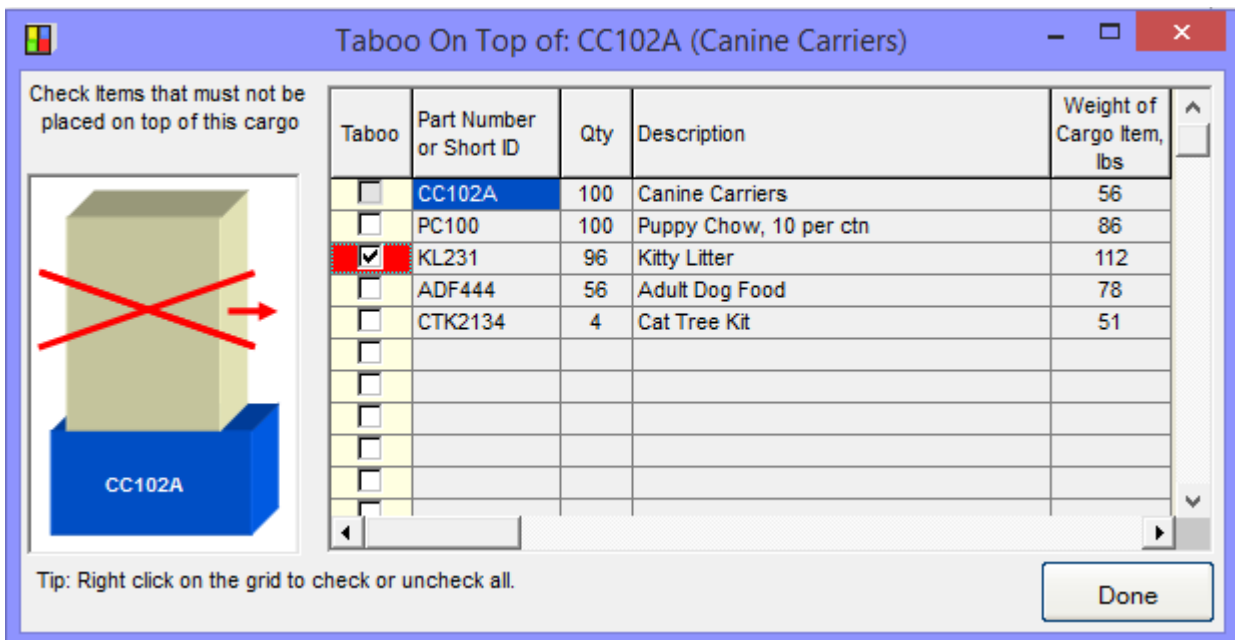
You may easily prevent the loading of, perhaps heavy, cargo on cargo that may not support it, by establishing taboo relationships.

Right click the row containing the lower cargo:



Choose "Make some cargo Taboo On Top of this Cargo. The Taboo On Top window will open:

Check boxes as needed to prevent the the checked cargo from being loaded on top of the lower cargo.



Close the Taboo On Top window by clicking the Done button, and proceed to load as usual.

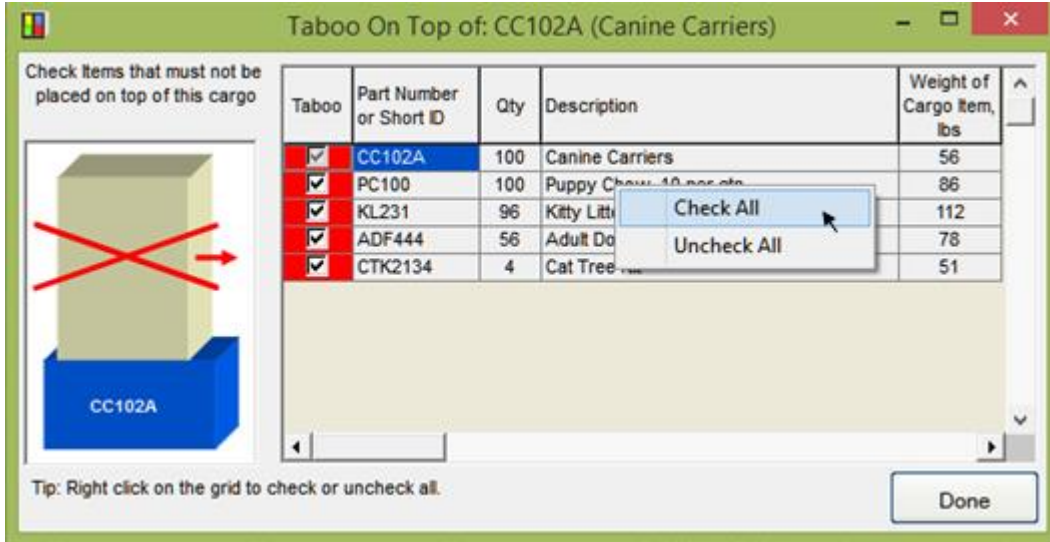
In this example the Kitty Litter will not be loaded on top of the Canine Carriers.

Notes:

The Taboo cargo will not load on top even if it is only partially on top.

The Taboo cargo will not load on top even if there is other cargo in between.

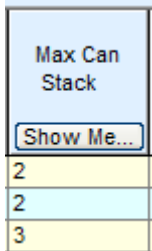
To quickly stop all cargo from being placed on top, **Right click** and select "**Check All**".



Set Stacking Limits

In most cases this is left blank and CargoWiz will utilize the full height of the truck or container to stack.

But if you wish to set a limit you may do so by putting the limit in the grid column:

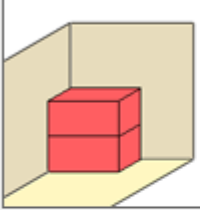


Click on the "Show Me" button in the Max Can Stack column heading to see the details shown in the graphic below:

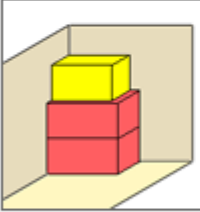
Max Can Stack and Taboo-On-Top Explained

There are two types of stacking that may be controlled.

Stacking of the SAME type of cargo is controlled if you place a number in the Max Can Stack grid column.




Usually it is left blank and CargoWiz will stack if there is more of the same cargo type available. If you supply a value it will stop stacking when the number entered has been reached, in this example 2.



It is IMPORTANT to note that when Max Can Stack has been reached CargoWiz is still free to stack any other cargo types on top unless you have established Taboo-On-Top restrictions.

Taboo-On-Top restrictions are established by right clicking on the Cargo Row that needs restrictions on what may be placed on top.

| | | | |
|----|-----|-----|----|
| | | | |
| 23 | 100 | 140 | 70 |
| 77 | 33 | 76 | 88 |
| 63 | 45 | 37 | 54 |



For more information see the help file, "How Do I..." and look for "Taboo"..

To limit **what** can be stacked on top of this cargo item, refer to ["Control Taboo On Top"](#) within this Help file.

Import/Export with Company System (ERP)

CargoWiz can be integrated with any system that can produce .txt files with the cargo data in an expected format.

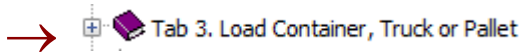
With a document "How to Import from ERPs," a programmer/IT person can enable the ERP to create and deposit text files in an expected format that can be opened by the CargoWiz user. The data in the text file is automatically drawn into the Cargo Data grid on Tab 2. Data is also returned to the ERP.

For a copy of the document "How to Import form ERPs," email your request to support@softtruck.com

Tab 3. Load Container, Truck or Pallet

This section of the Help File is designed to answer the CargoWiz user's questions regarding how to load the container, truck or pallet.

It may be necessary to click on the "+" to open the list of Tab 3. Load Container, Truck or Pallet topics.



Load For Stops or Deliveries

Information on loading for Stops or Deliveries can be found using the link below:

["Controlling the Loading Order"](#)

Control the Loading Sequence

Information on Controlling the Loading Sequence can be found using the link below:

["Controlling the Loading Order"](#)

Force a Cargo Item to be Loaded First

To Specify some Cargo to be loaded first or last:

| Max Can Stack | Bottom Only | Loading Priority or Group | Weight of Cargo Item, lbs | Units Inside this Cargo Item | To |
|---------------|--------------------------|---------------------------|---------------------------|------------------------------|----|
| Show Me... | <input type="checkbox"/> | Show Me... | 22 | | |
| | <input type="checkbox"/> | 1 | 17 | | |

How many of these will fit?

Make some cargo Taboo On Top of this Cargo

Duplicate This Row

Load This Row First

Load This Row Last

Delete Priority Settings (All Rows)



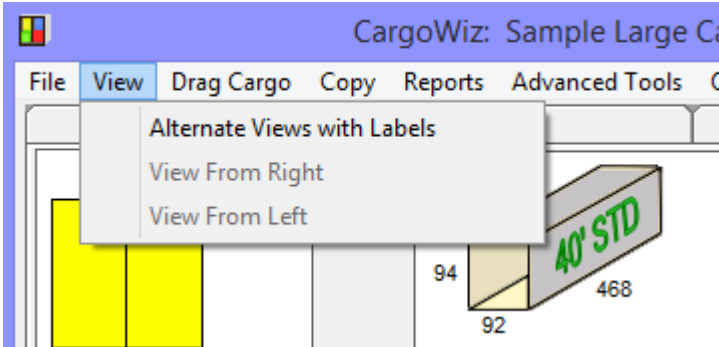
Click the right mouse button anywhere in the row and select from the drop-down list with a left button click.

To set more complex loading sequence rules, such as loading for multiple stops or setting loading priorities, see:

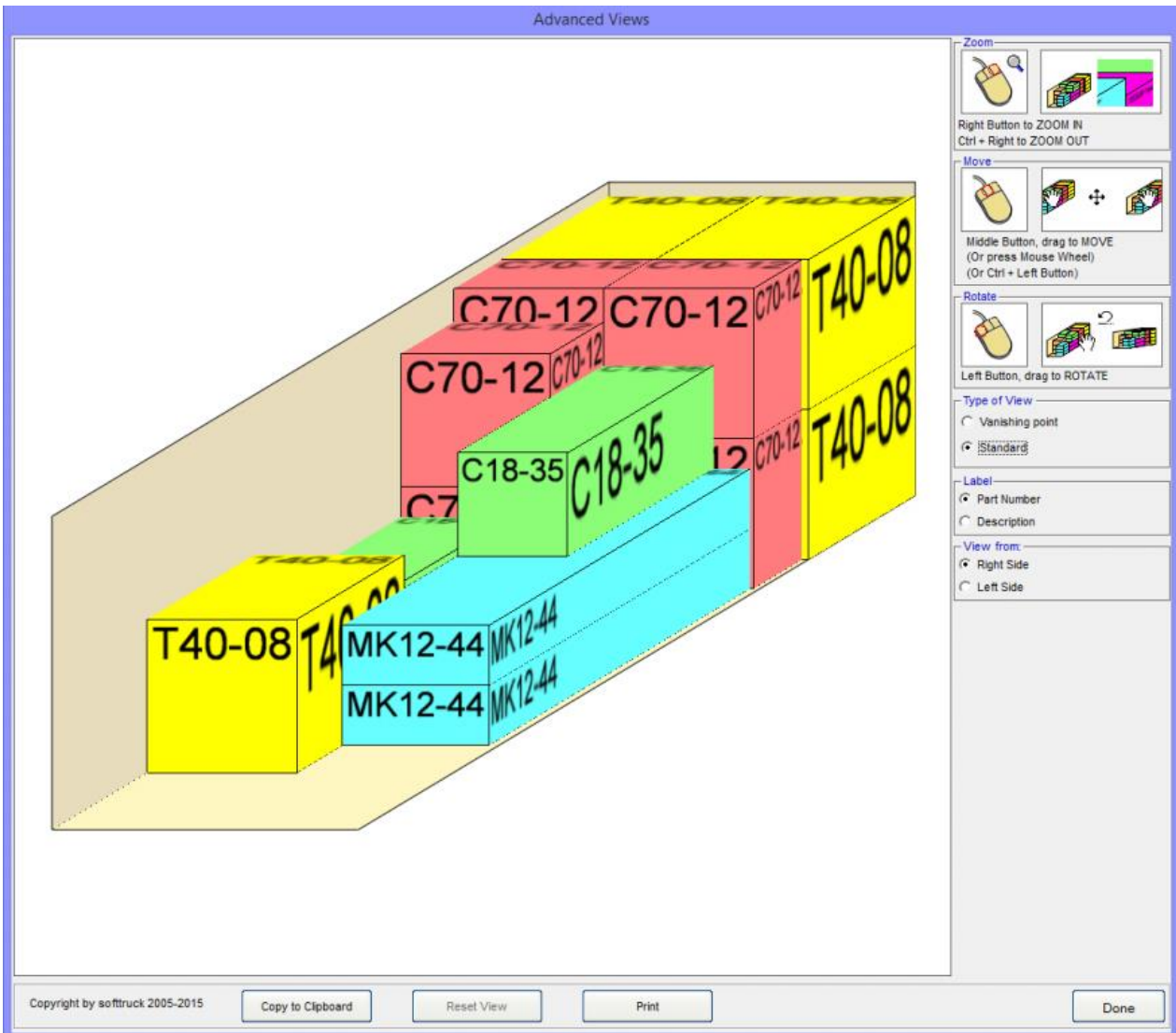
["Controlling the Loading Order"](#)

See Part Number Labels on Cargo

You may explore the load once it is created by going to "Alternate Views with Labels."



This will open the Advanced Views Window shown below. Here you can zoom in and out, rotate and translate the view. You can also choose the label to be Part Number or Description.



Learn How Many Will Fit

Method #1:

One method is to try to create a load with somewhat more than you think will fit. (The "mini Trucks" in the Cargo Size tab give you a prediction).



After loading, look at this information on Tab 3:

This Container

| | | |
|-----------|-------------|----------|
| To Load | Loaded | Left Out |
| 402 | 356 | 46 |
| Container | Vol. Used % | |
| 1 | 83.4 | |

The amount loaded is the amount that will fit. If you like you can then go to the Cargo Grid and put in the exact fit quantity.

Method #2: How many of a specific cargo row will it take to fill the container?

Right click on the cargo row. From the drop-down box, choose "How many of these will fit." This tells you how many of that cargo item it would take to fill the chosen container.



| Loading Priority or Group | Weight of Cargo Item, lbs | Units Inside this Cargo Item | To Un |
|---------------------------|---------------------------|------------------------------|-------|
| | | | |

How many of these will fit?

- Make some cargo Taboo On Top of this Cargo
- Duplicate This Row
- Load This Row First
- Load This Row Last
- Delete Priority Settings (All Rows)

This Container

| | | |
|-----------|-------------|----------|
| To Load | Loaded | Left Out |
| | 40 | |
| Container | Vol. Used % | |
| 1 | 80.1 | |

This Shipment

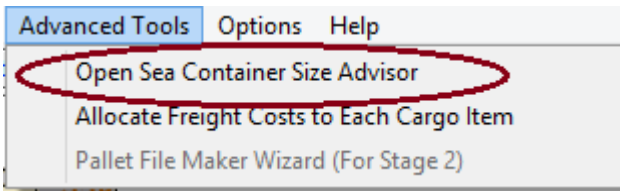
| | | |
|---------|--------|----------|
| To Load | Loaded | Left Out |
| | | |

Container Advisor

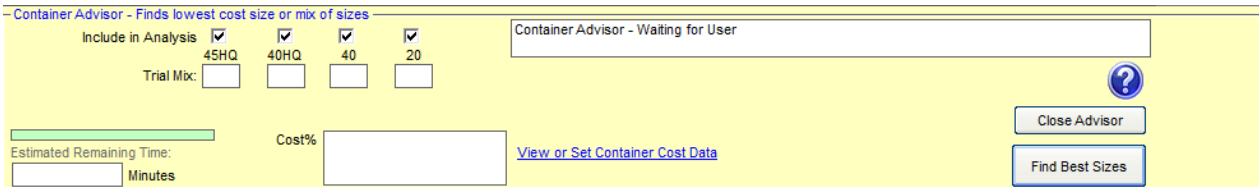
Using the Open Sea Container Size Advisor

For assistance in determining which combination of containers to use, access the Open Sea Container Size Advisor.

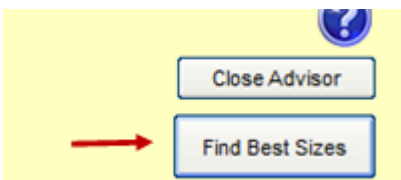
Go to Advanced Tools, and choose Open Sea Container Size Advisor.



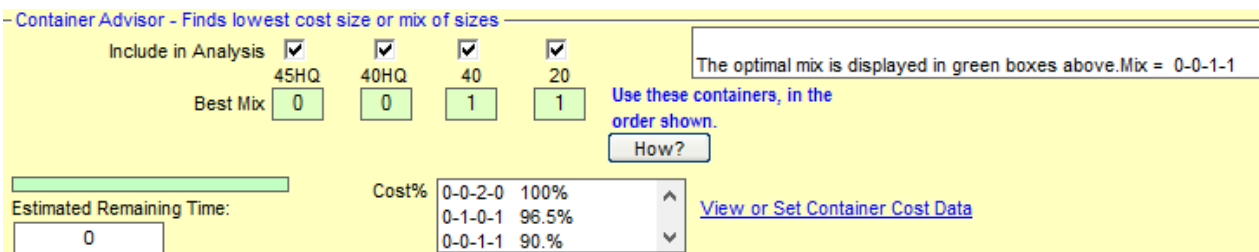
The Container Advisor window will open at the bottom of Tab 3. Check the boxes for the containers that you want to include in the analysis. Be sure to uncheck any container with dimensions that you know are too small to accommodate any of your large cargo dimensions.



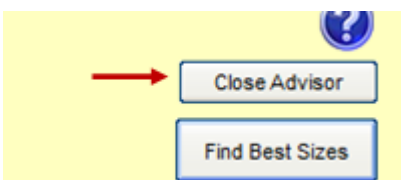
Choose the "Find Best Sizes" button.



If it is a large shipment, it may take a few minutes to review the possibilities. When completed the words "Trial Mix:" will change to "Best Mix." You will find the results in the green boxes next to "Best Mix." The example below shows the best mix as one 40 foot and one 20 foot container.



Once you are finished, click the "Close Advisor" button and you will be back at Tab 3.



Use this link for information on how to [Load a 40](#) foot container, then the rest into a 20 foot container.

Load a 40 foot, then the rest into a 20 foot truck or container

You may switch truck or container sizes when the load operation for one is complete.

For example, with a 40 foot container selected, click "Load First Container".

When that load plan has finished, if you wish the remainder to go in some other size, such as a 20 foot container, go to tab #1 and click the size you want.

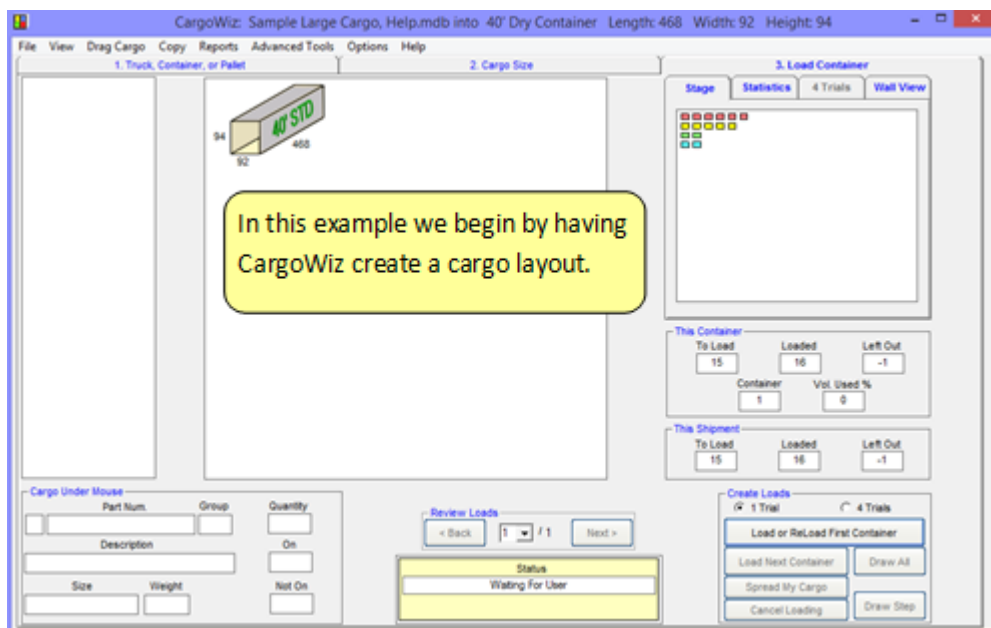
Then return to tab #3 and click "Load Next Container."

Drag and Drop Cargo

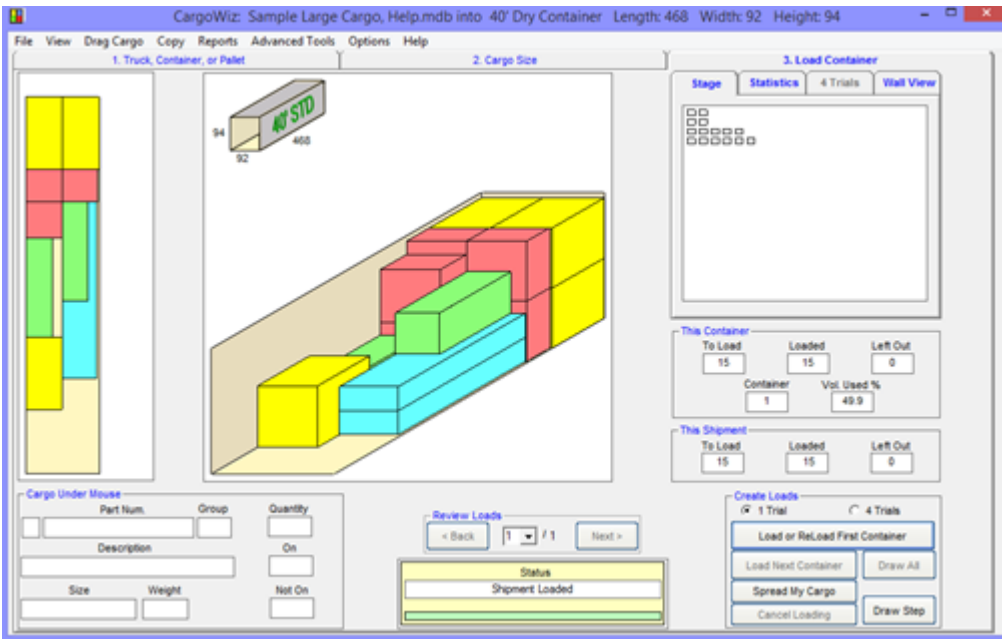
See the Drag and Drop feature in action. View a demonstration video by searching the web for "YouTube CargoWiz Drag and Drop Demo."

Here's how it works.

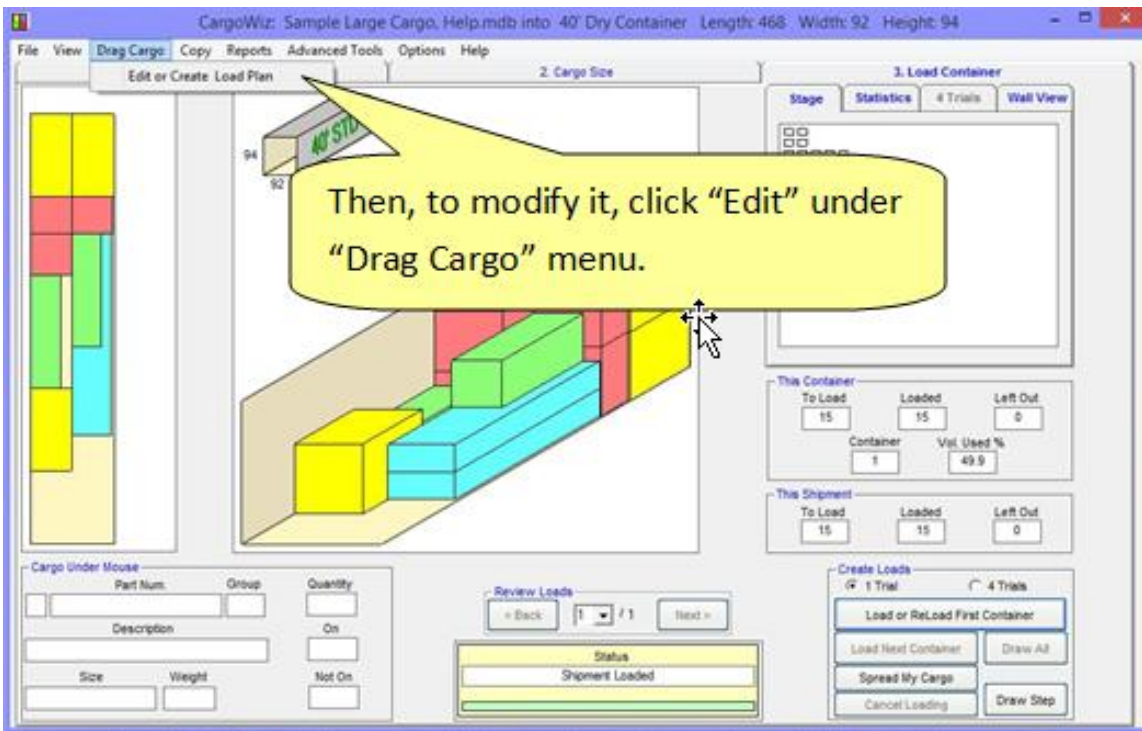
1. Either have CargoWiz create a load layout (Load First Truck/Container Button) which you will modify, or create the load entirely on your own. (Do not click the Load First Truck/Container Button)



Here it is loaded:

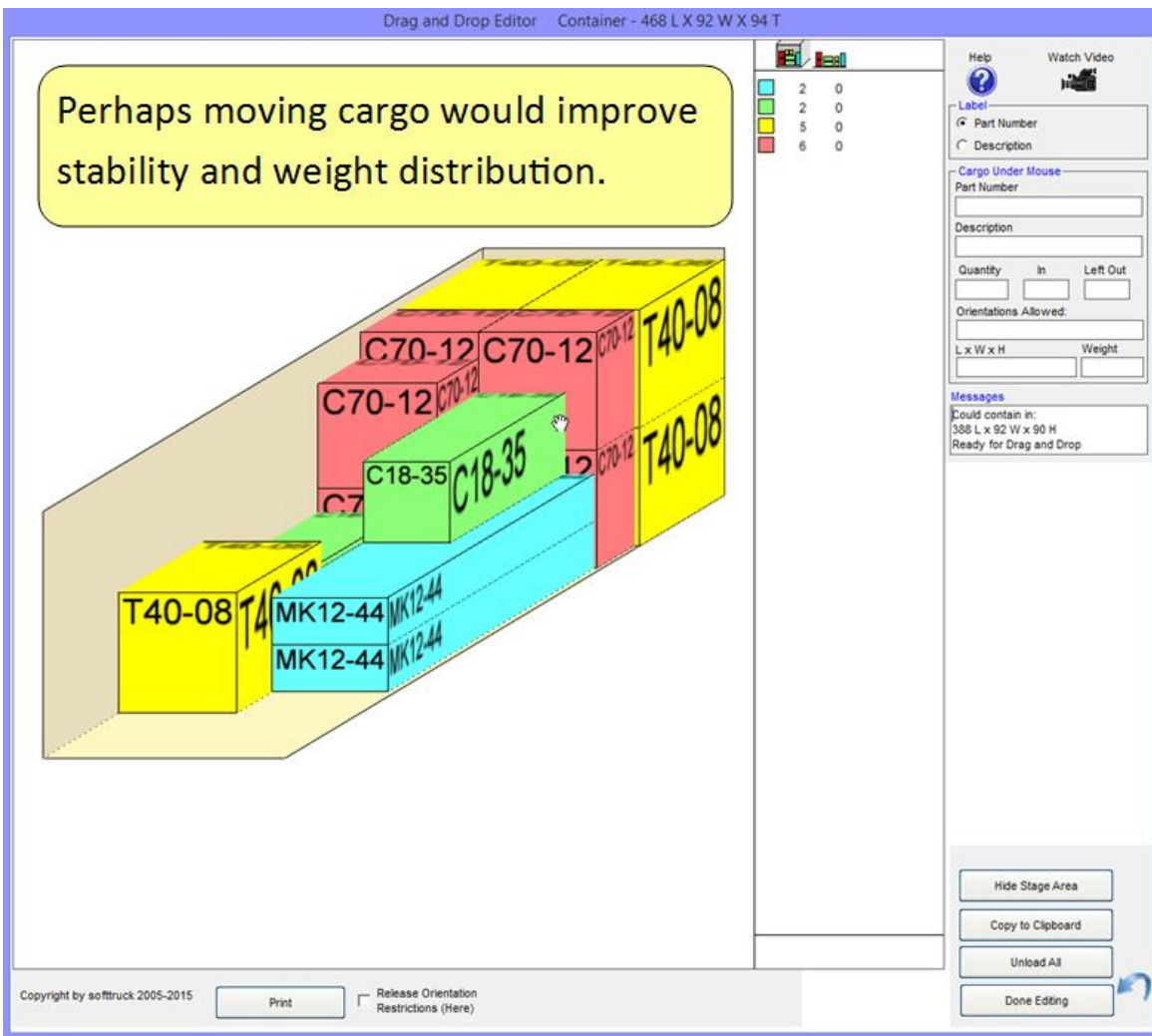


Next:

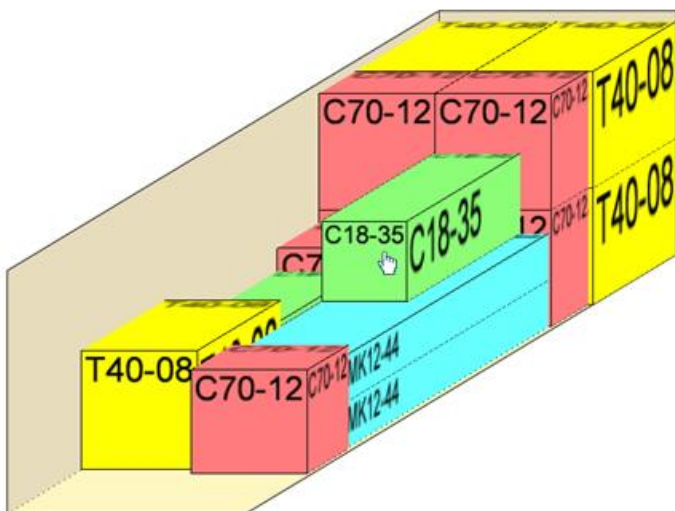


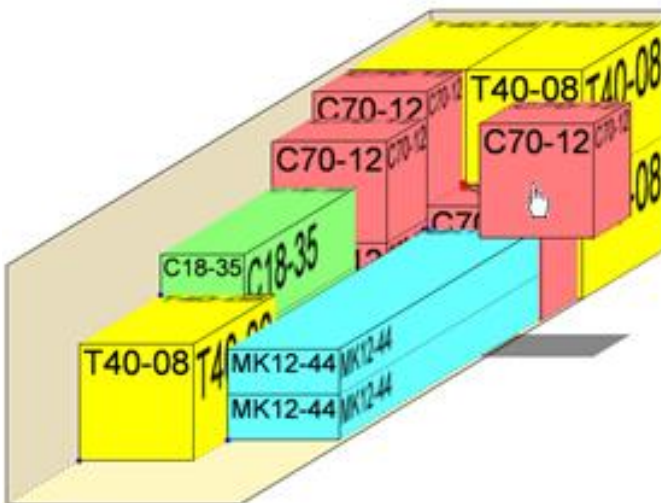
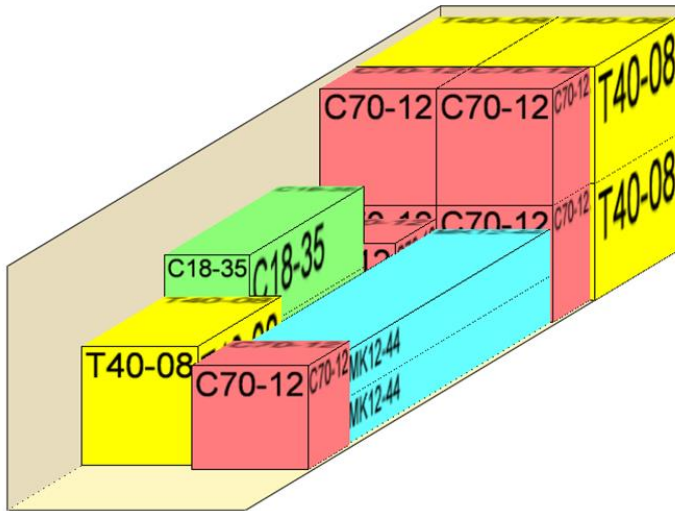
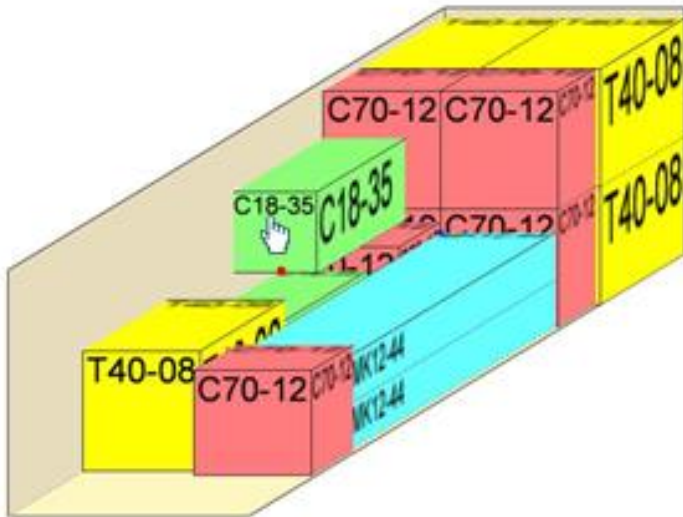
The current Window will close and the Editing Window will open.

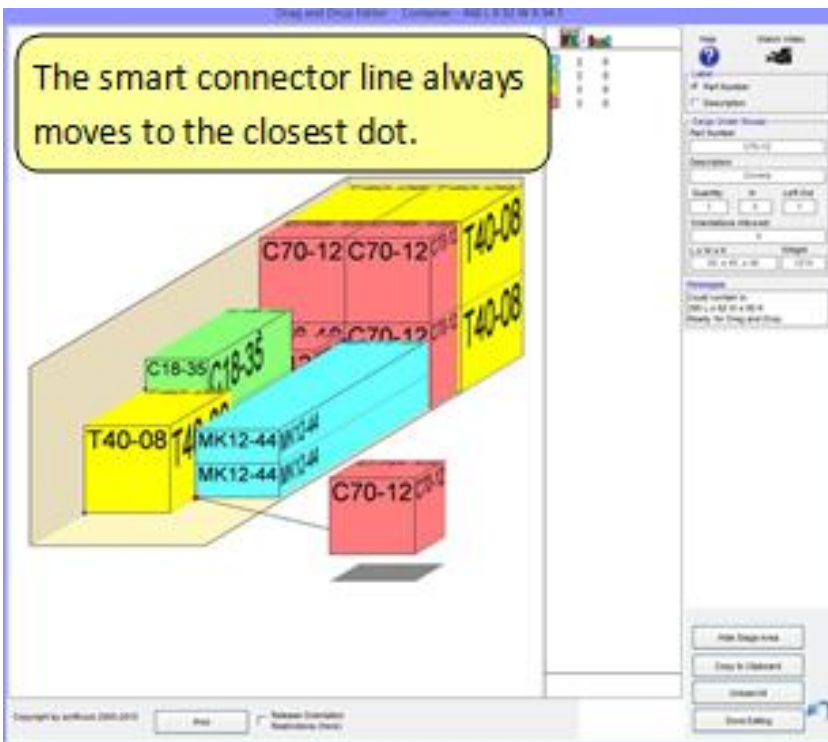
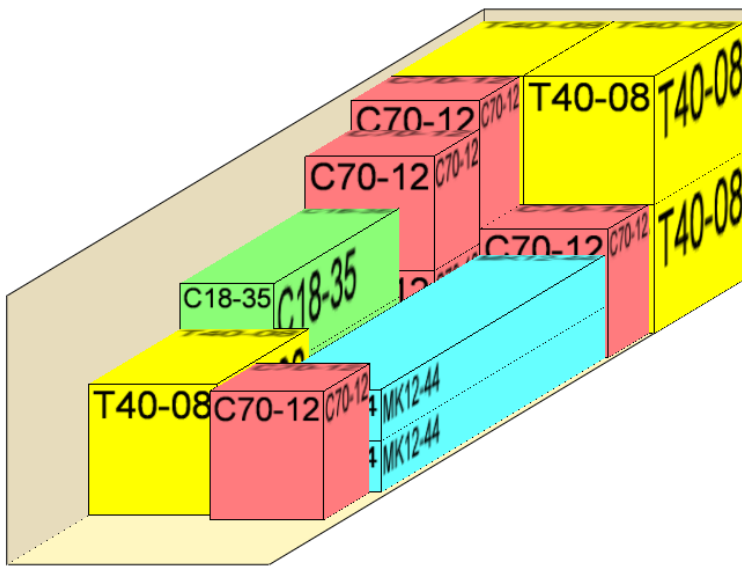
Note: If your load has many cargo items this can be slow, so please be patient.



Click on Cargo to drag and move them:

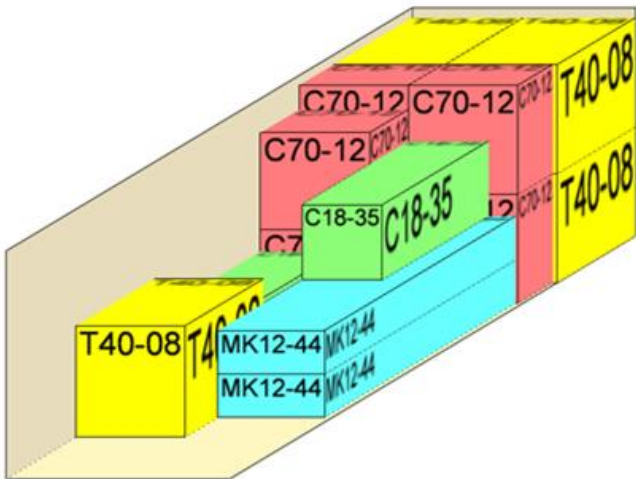






The Stage Area

Drag and Drop Editor Container - 468 L X 92 W X 94 T



This is the Stage Area

Help Watch Video

Label:
 Part Number
 Description

Cargo Under Mouse
Part Number:
Description:
Quantity In Left Out
Orientations Allowed:
L x W x H Weight

Messages
Could contain in:
388 L x 92 W x 90 H
Ready for Drag and Drop

Hide Stage Area
Copy to Clipboard
Unload All
Done Editing

Copyright by softtruck 2005-2015 Release Orientation Restrictions (Here)

Drag and Drop Editor Container - 468 L X 92 W X 94 T

These are cargo tokens

| | | |
|--|---|---|
| | 2 | 0 |
| | 2 | 0 |
| | 5 | 0 |
| | 6 | 0 |

Help Watch Video

Label

Part Number

Description

Cargo Under Mouse

Part Number

Description

Quantity In Left Out

Orientations Allowed:

L x W x H Weight

Messages

Could contain in:
388 L x 92 W x 90 H
Ready for Drag and Drop

Hide Stage Area

Copy to Clipboard

Unload All

Done Editing

Copyright by softtruck 2005-2015

Print

Release Orientation Restrictions (Here)

Drag and Drop Editor Container - 468 L X 92 W X 94 T

The number loaded

| | |
|---|---|
| 6 | 0 |
| 5 | 0 |
| 1 | 1 |
| 0 | 2 |

Help Watch Video

Label:
 Part Number
 Description

Cargo Under Mouse

Part Number

Description

Quantity In Left Out

Orientations Allowed:

L x W x H Weight

Messages

Could contain in:
388 L x 92 W x 90 H
Ready for Drag and Drop

Hide Stage Area
Copy to Clipboard
Unload All
Done Editing

Copyright by softtruck 2005-2015 Release Orientation Restrictions (Here)

Drag and Drop Editor Container - 468 L X 92 W X 94 T

Help Watch Video

Label
Part Number
Description

Cargo Under Mouse
Part Number
Description
Quantity In Left Out
Orientations Allowed:
L x W x H Weight

Messages
Could contain in:
388 L x 92 W x 90 H
Ready for Drag and Drop

Hide Stage Area
Copy to Clipboard
Unload All
Done Editing

Copyright by softtruck 2005-2015 Print Release Orientation Restrictions (Here)

Drag and Drop Editor Container - 468 L X 92 W X 94 T

The screenshot shows a 3D perspective view of a container with a yellow floor and grey walls. Inside, several cargo blocks are stacked. From left to right, there is a yellow block labeled 'T40-08', a green block labeled 'T40-08-35', and a stack of red blocks labeled 'C70-12'. To the right of the red blocks is another stack of yellow blocks labeled 'T40-08'. The right side of the interface features a control panel with a legend, a 'Cargo Under Mouse' section, and a 'Messages' section. A yellow speech bubble points to the 'Unload All' button in the bottom right corner.

| | |
|---|---|
| 6 | 0 |
| 5 | 0 |
| 1 | 1 |
| 0 | 2 |

Label:
 Part Number
 Description

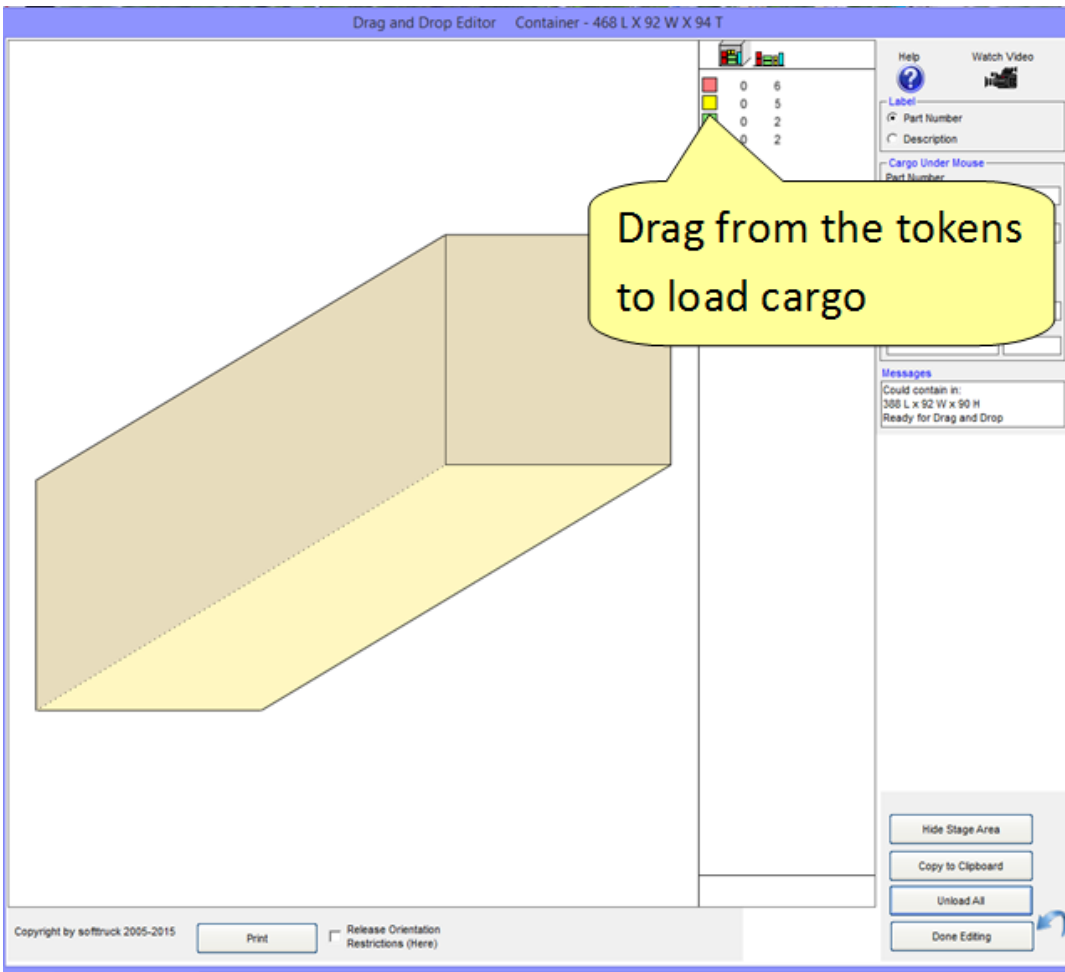
Cargo Under Mouse
Part Number: _____
Description: _____
Quantity: In: _____ Left Out: _____
Orientations Allowed: _____
L x W x H: _____ Weight: _____

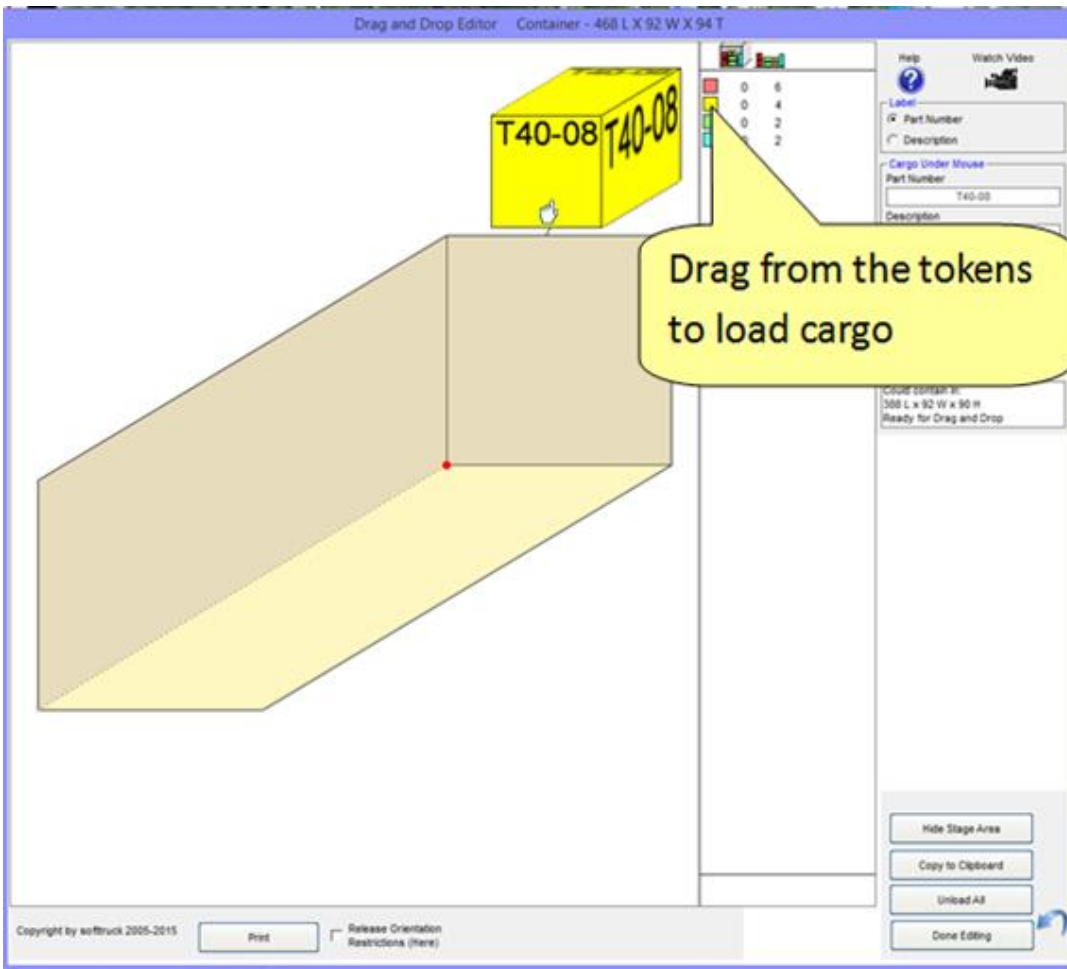
Messages
Could contain in:
388 L x 92 W x 90 H
Ready for Drag and Drop

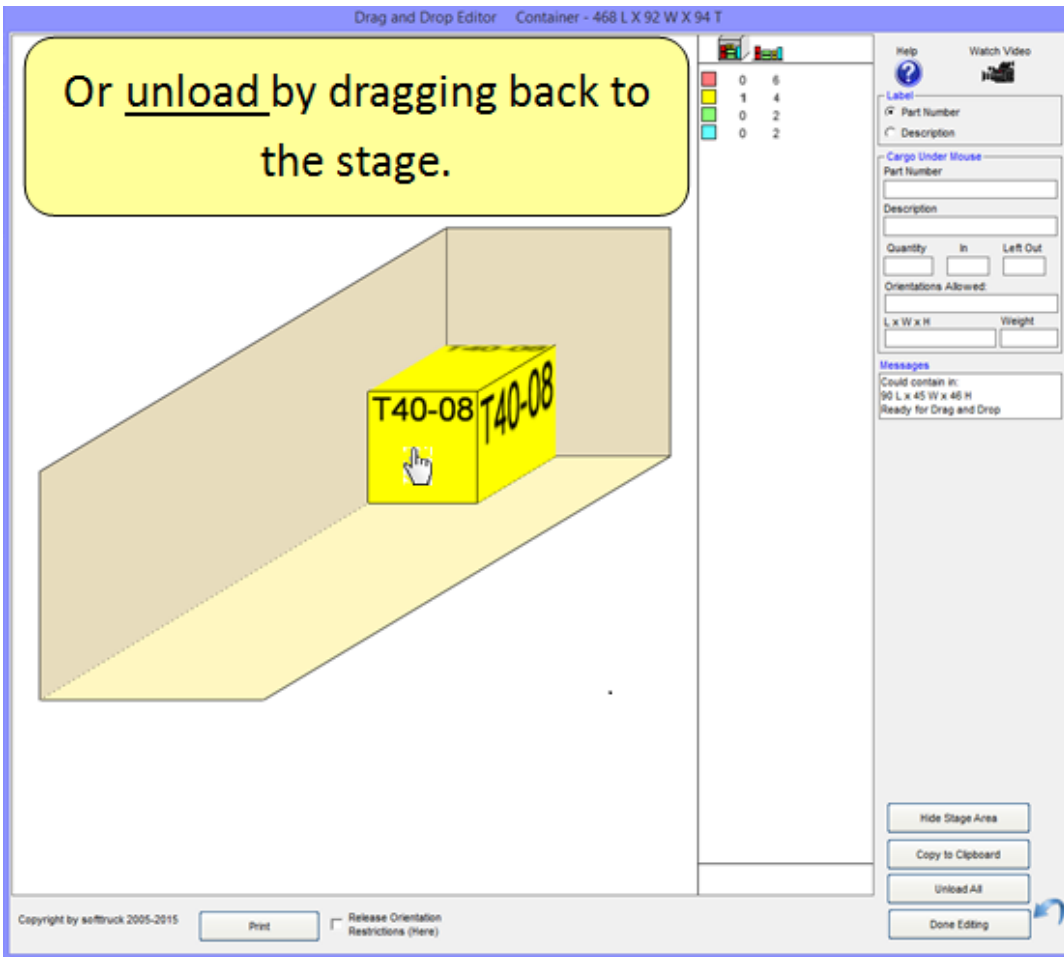
Let's unload everything

Hide Stage Area
Copy to Clipboard
Unload All
Done Editing

Copyright by softtruck 2005-2015
Print
Release Orientation Restrictions (Here)

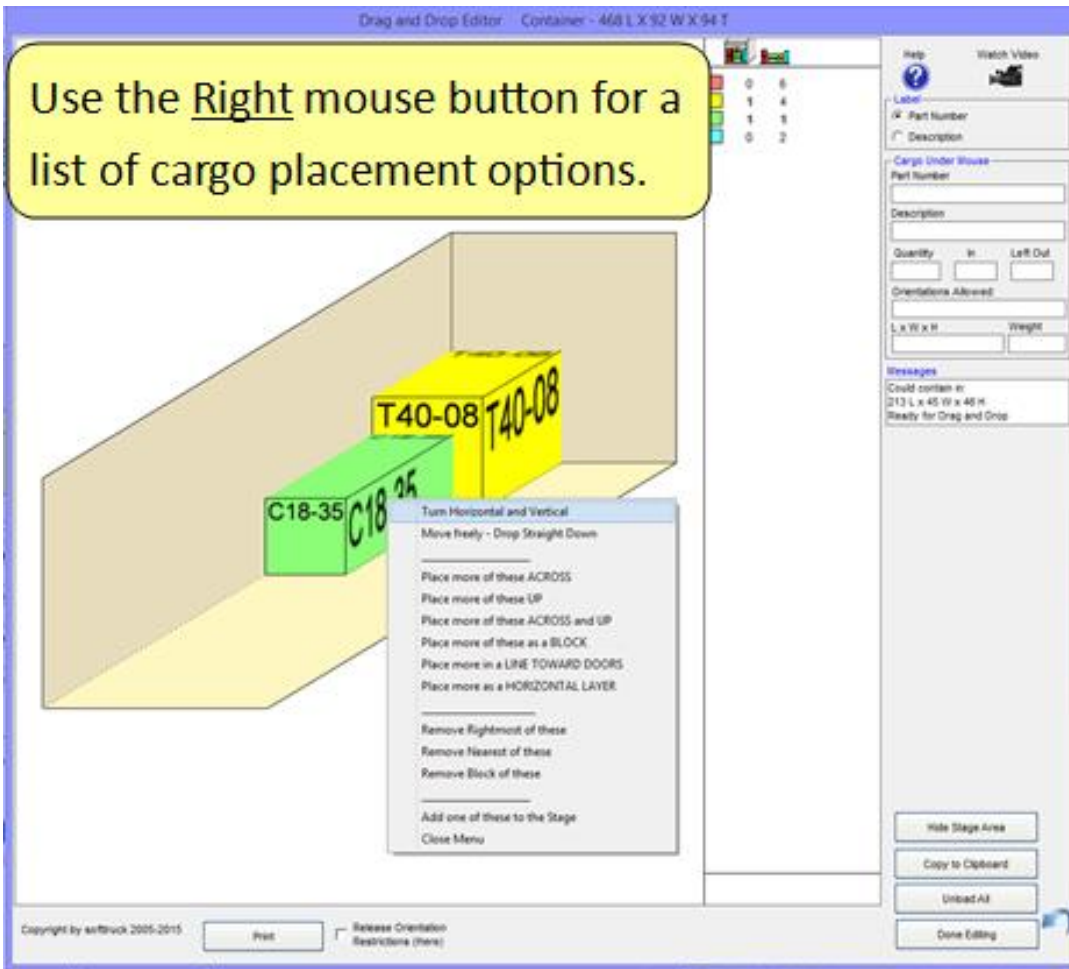




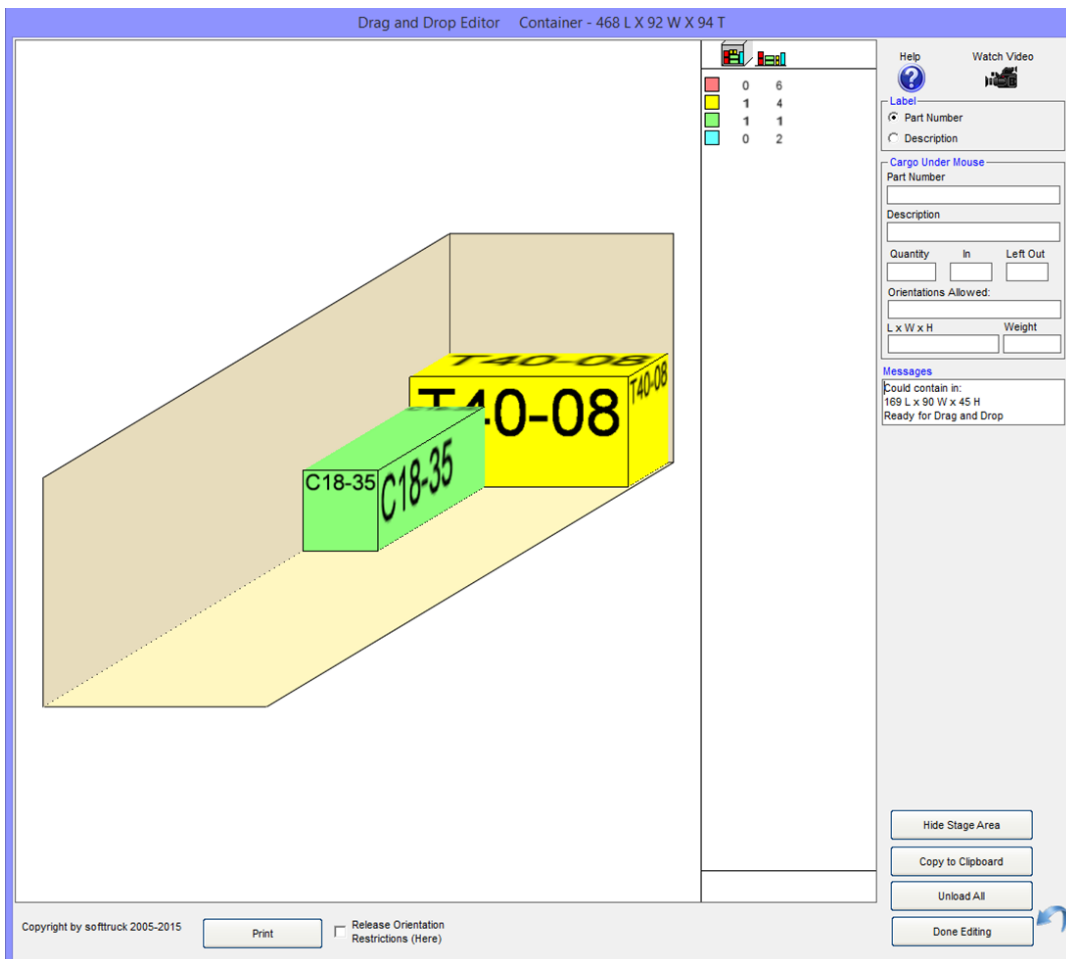


You can also drag from the truck back to the stage and the cargo will be a token again.

Turning Cargo:

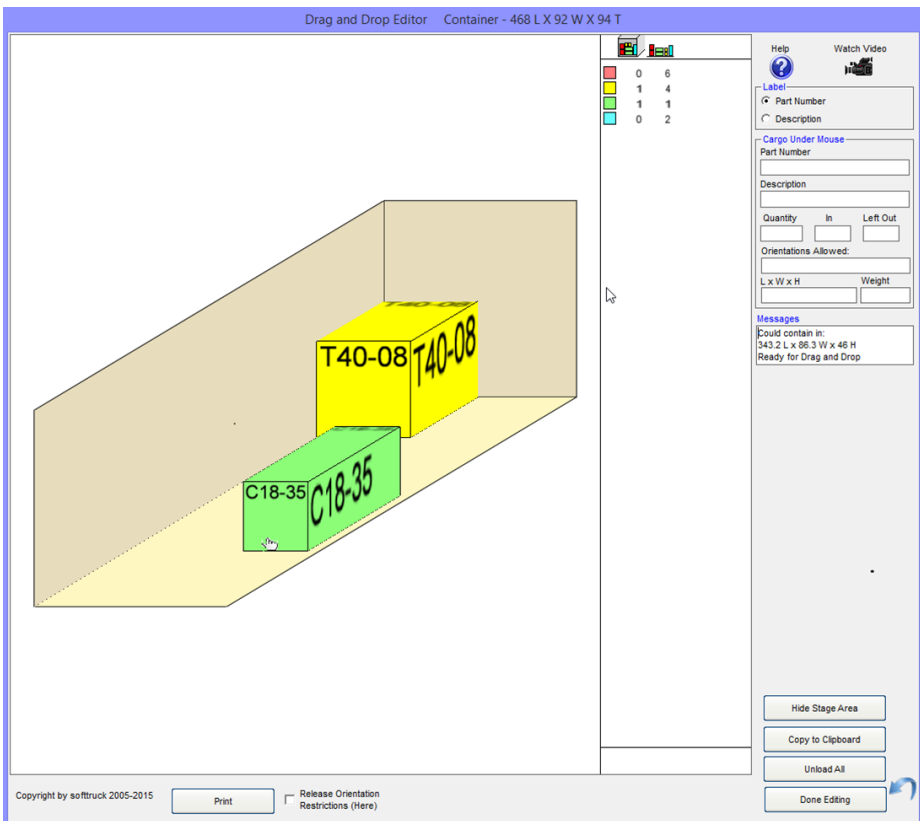
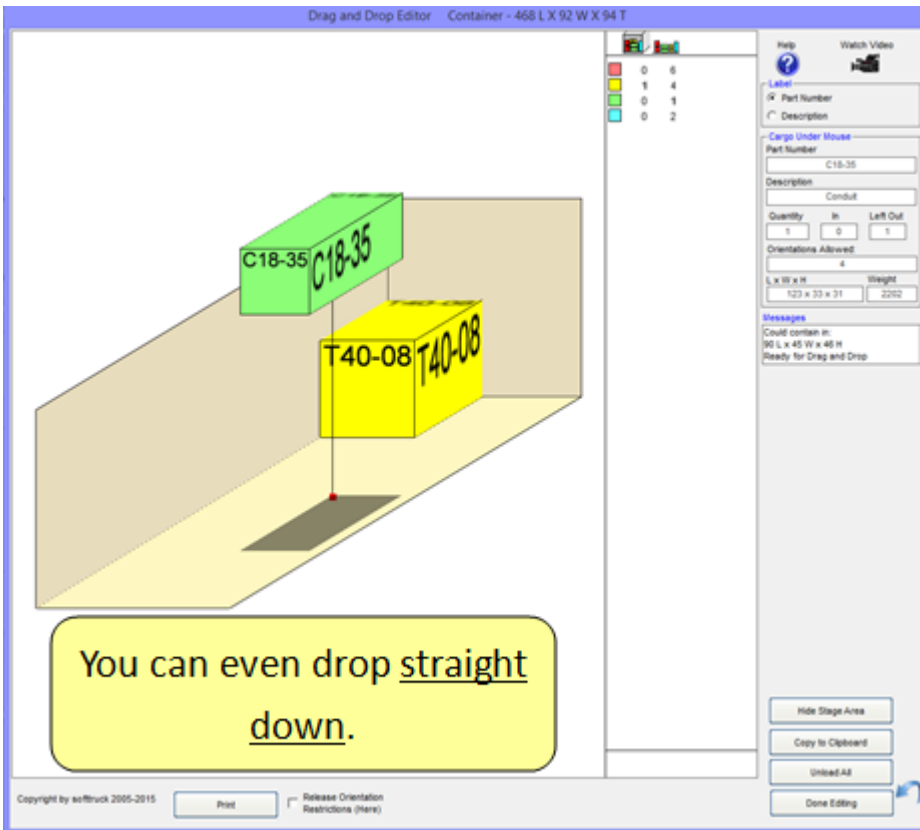


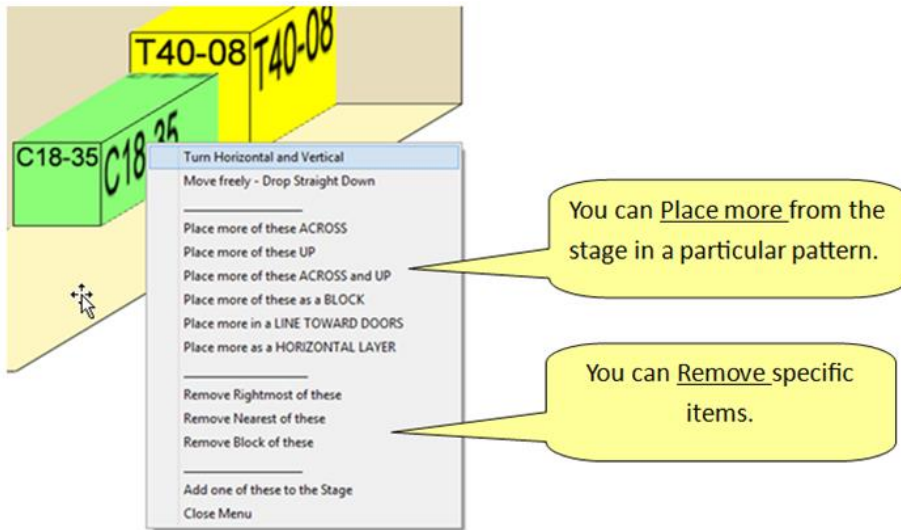
Let's turn the first item horizontally...



Here is the list of cargo placement options:

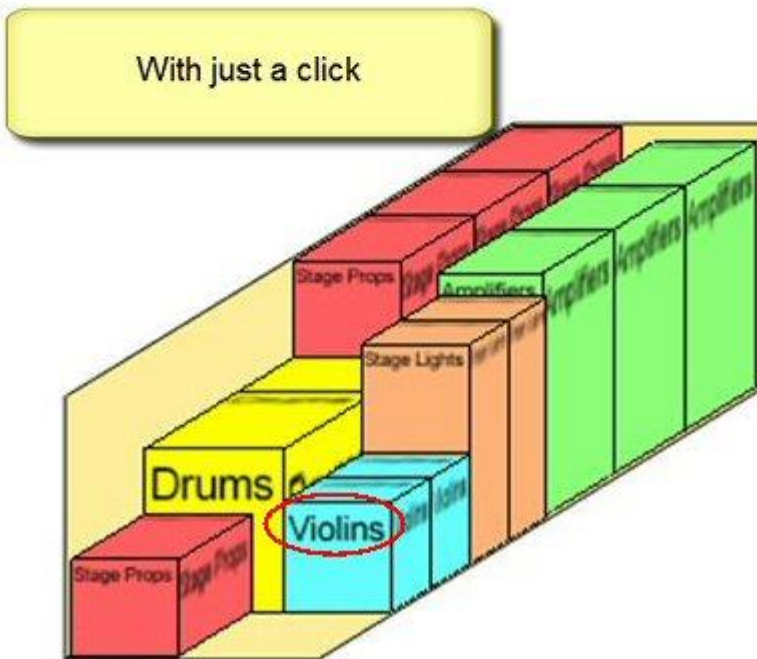
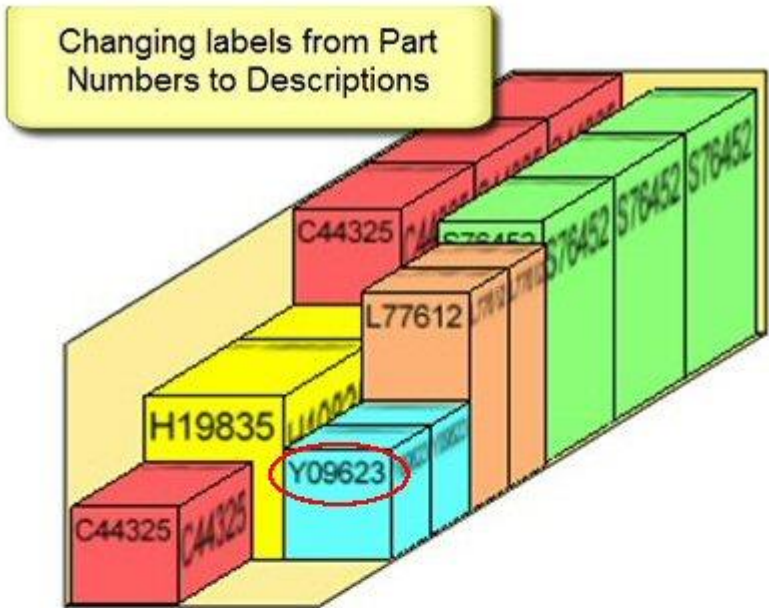
- | Turn Horizontal and Vertical |
|-----------------------------------|
| Move freely - Drop Straight Down |
| Place more of these ACROSS |
| Place more of these UP |
| Place more of these ACROSS and UP |
| Place more of these as a BLOCK |
| Place more in a LINE TOWARD DOORS |
| Place more as a HORIZONTAL LAYER |
| Remove Rightmost of these |
| Remove Nearest of these |
| Remove Block of these |
| Add one of these to the Stage |
| Close Menu |





You may also chose between labeling with Part Numbers or Descriptions.



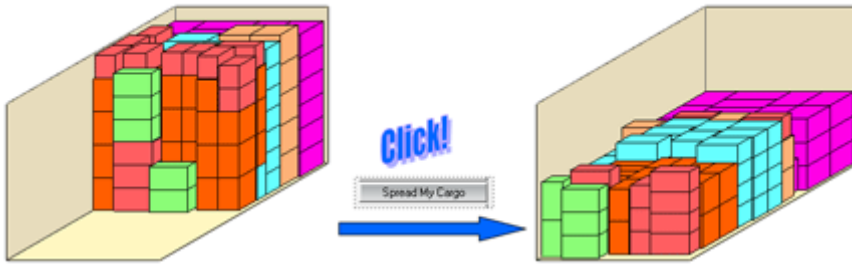


Spread the Cargo

You Can Spread the Cargo For Stability

CargoWiz tries to develop a tight load starting from the back. However, if it runs out of cargo to load it may be desirable to spread the cargo.

If it is the last truck, container or pallet in the shipment, and it is not filled, the "Spread My Cargo" button is enabled.



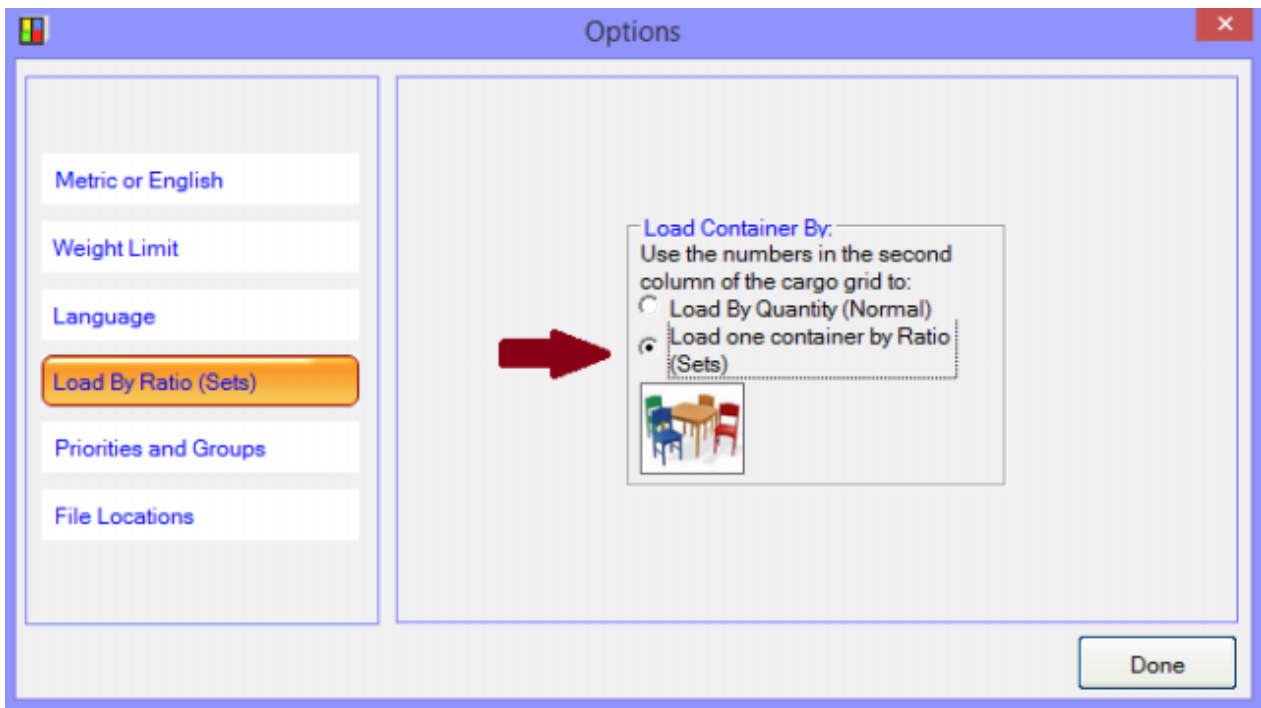
Load by ratio (Sets)

Perhaps you ship in sets and wish to send full containers or trucks that maintain the ratio of items that form a set, like each table has 4 chairs.



You would like to determine how many will fit, and how to load them.

Under Options, look for:



Select the Ratio option.

Then, in the Cargo Grid, enter the ratio of items in the set:

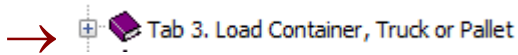
| Part Number or Short ID | Ratio | Length (In) |
|-------------------------|-------|-------------|
| Chairs | 4 | 35 |
| Tables | 1 | 53 |

Click "Load First Truck/Container". CargoWiz will try to load a large number of sets, then try fewer and fewer sets until it finds a solution with none left over.

Work With the CargoWiz Results

This section of the Help File is designed to answer questions regarding how to work with the CargoWiz results.

It may be necessary to click on the "+" to open the list of Work With the Cargo Results topics.



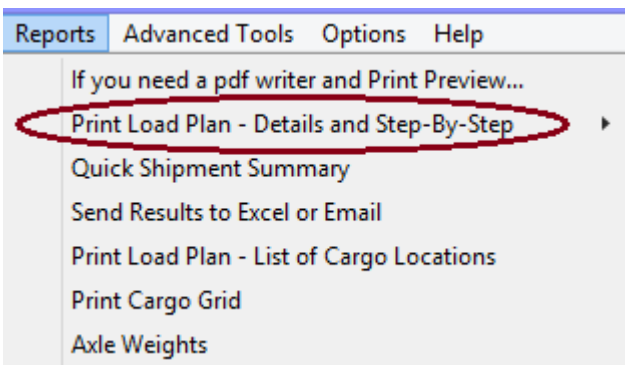
Reports - Load Plan Report and Quick Shipment Summary

Load Plan - Details and Step-by-Step Report

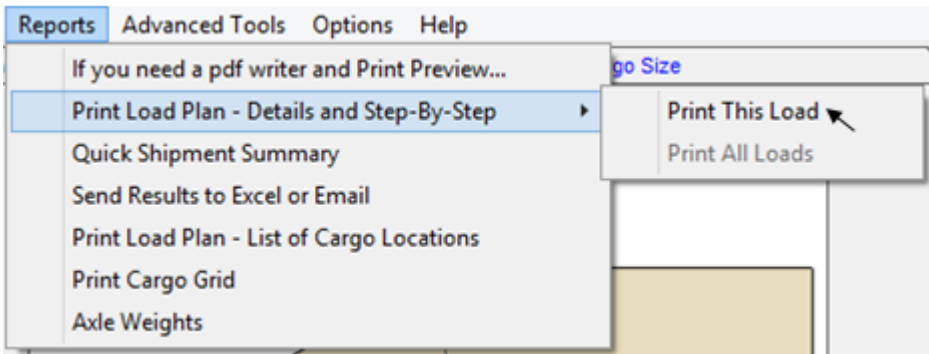
After loading a container, Reports will be available on the CargoWiz main tool bar.



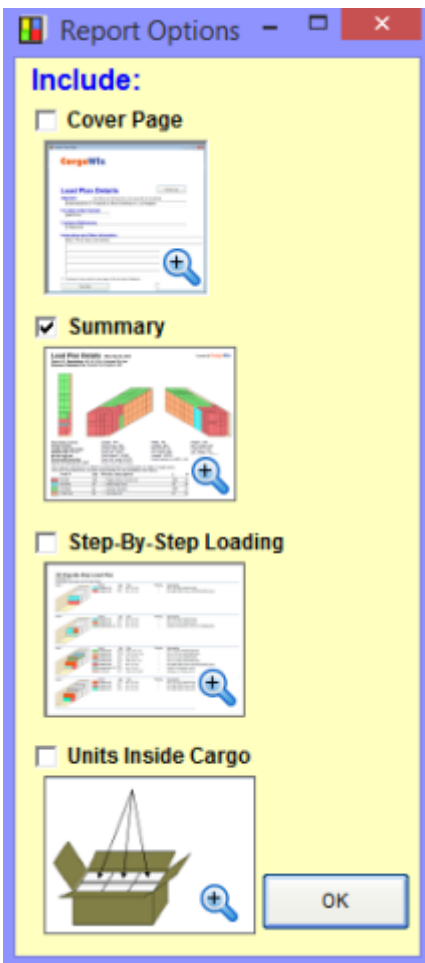
From the drop-down list, choose Print Load Plan - Details and Step-by-Step.



Choose to print just one load or the entire shipment (All Loads).



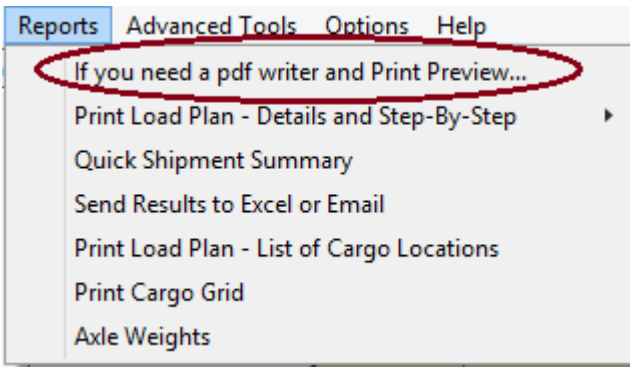
A window will open displaying the print options.



Check the boxes for the pages that you want to include in the report: Cover Page, Summary, Step-By-Step Loading and Units Inside Cargo. After making the selections, click the "OK" button.

Choose to print to a PDF Maker (a virtual printer, such as the free "Bullzip") or any available printer.

Using a PDF Maker provides Print Preview, retains colors, and are easily shared files via email. If you do not have a PDF maker already set up in your printer list, you can add one. Some are available for free. Printing to a PDF maker saves paper and allows you to send the Load Plan Report to others by email. For additional information on setting up a PDF maker, choose this option under "Reports."


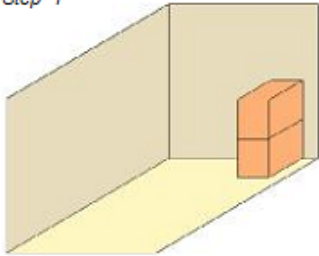

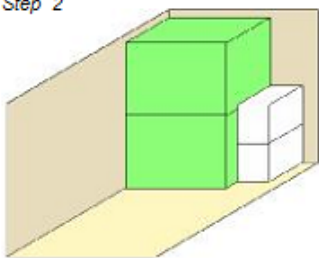

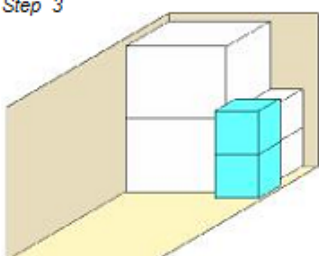


The customizable Cover Page allows you to add your own logo to the Cover Page.

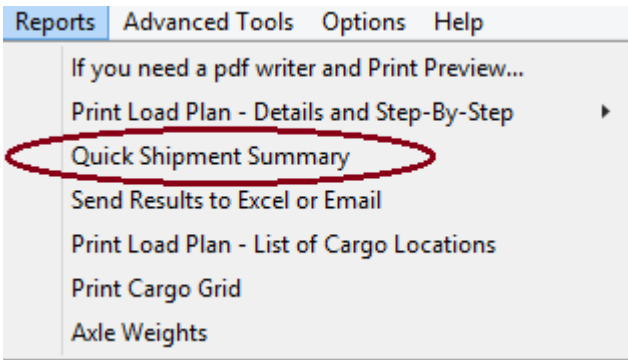
The Summary page of the Load Plan - Details and Step-By-Step report provides statistics of the load. Subsequent pages provide images showing each step in the loading process.

3D Step-By-Step Load Plan

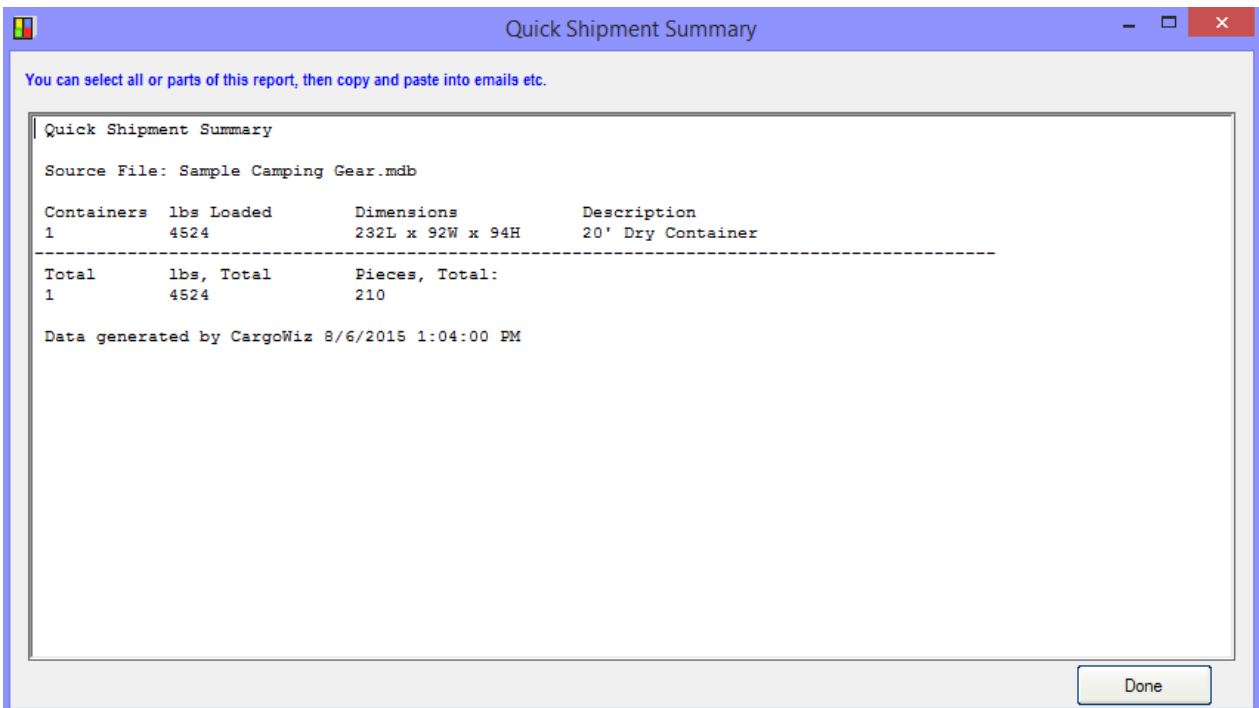
Container: # 1

| Step | Part# | Qty | Size | Priority | Description |
|---|--|----------------------------|-----------------|----------|-------------|
| Step 1 |  T6 | <input type="checkbox"/> 2 | 120 x 50 x 60 | -- | Table |
|  | | | | | |
| Step 2 |  S14 | <input type="checkbox"/> 2 | 158 x 158 x 113 | -- | Sofa |
|  | | | | | |
| Step 3 |  O215 | <input type="checkbox"/> 2 | 80 x 68 x 68 | -- | Ottoman |
|  | | | | | |

Quick Shipment Summary

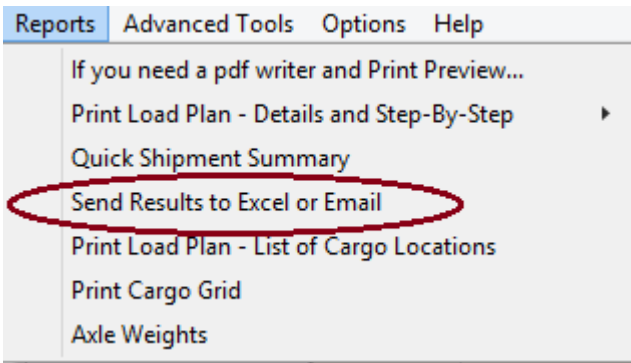


After loading, the Quick Shipment Summary provides a brief summary of the shipment. Drag the mouse across the data and copy. The information can be pasted into an email or word document. An example of the Quick Shipment Summary is shown here.



Send Results to Excel or Email

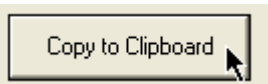
After creating a load, click the Reports menu and choose "Send Results to Excel or Email" as shown:



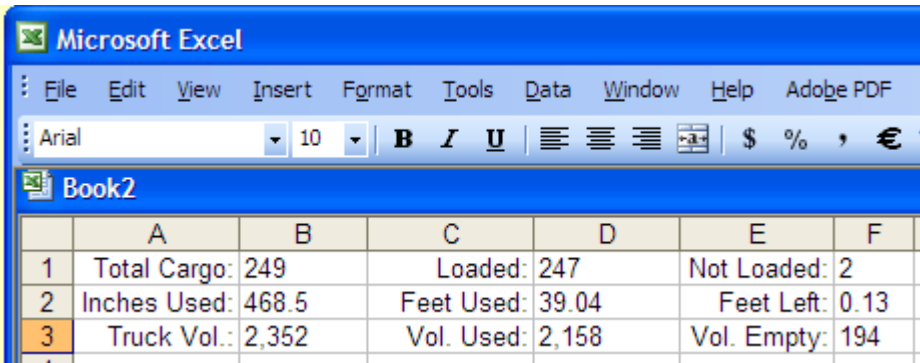
In the window that opens with grids, drag the mouse to select the data you want:

| | | | | | |
|------------------|--------|------------|-------|-------------|-----|
| Length: | 470 | Width: | 92 | Height: | 94 |
| Total Cargo: | 249 | Loaded: | 247 | Not Loaded: | 2 |
| Inches Used: | 468.50 | Feet Used: | 39.04 | Feet Left: | .13 |
| Truck Vol.: | 2,352 | Vol. Used: | 2,158 | Vol. Empty: | 194 |
| Total Weight: | 7,708 | Loaded: | 7,664 | Not Loaded: | 44 |
| Truck Vol. used: | 91.7 | Compact: | 92 | | |

Then click this button:



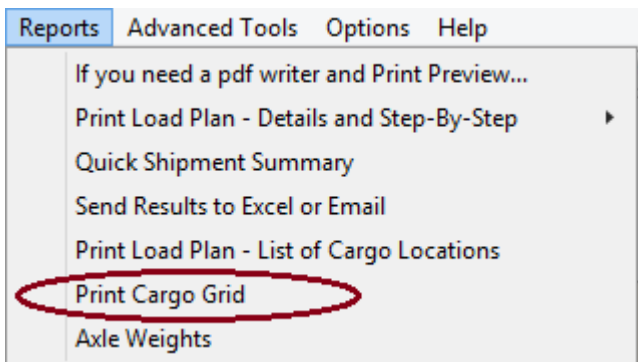
In Excel, an email or other program, click where you want the data and then paste:



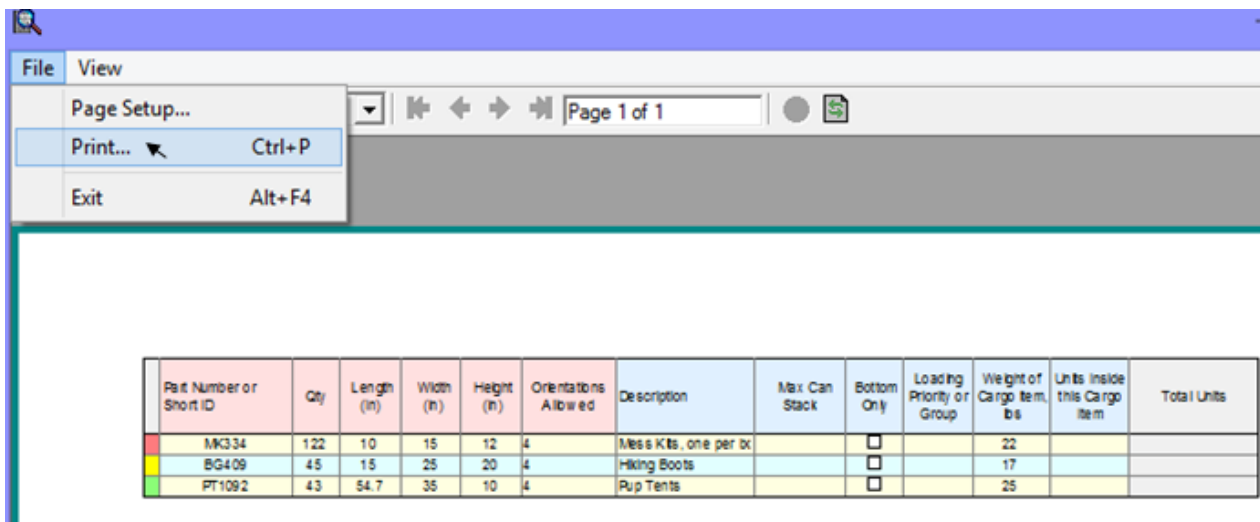
Print Cargo Grid

The Tab 2 Cargo Grid can be printed for use such as creating a picking ticket.

Go to Reports and choose "Print Cargo Grid."

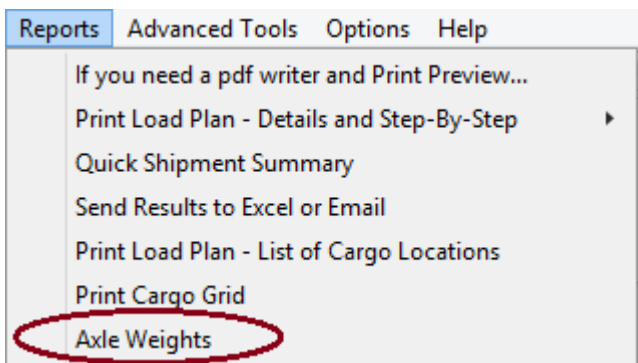


A window will open with your Cargo Grid. Choose "File," then "Print."

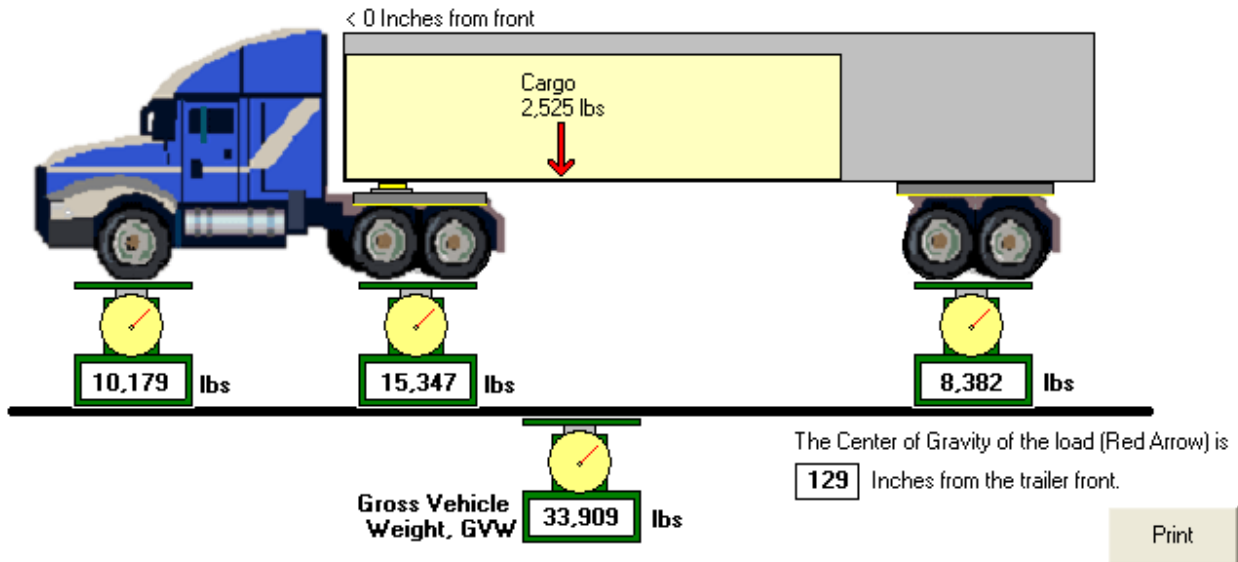


Axle Weights

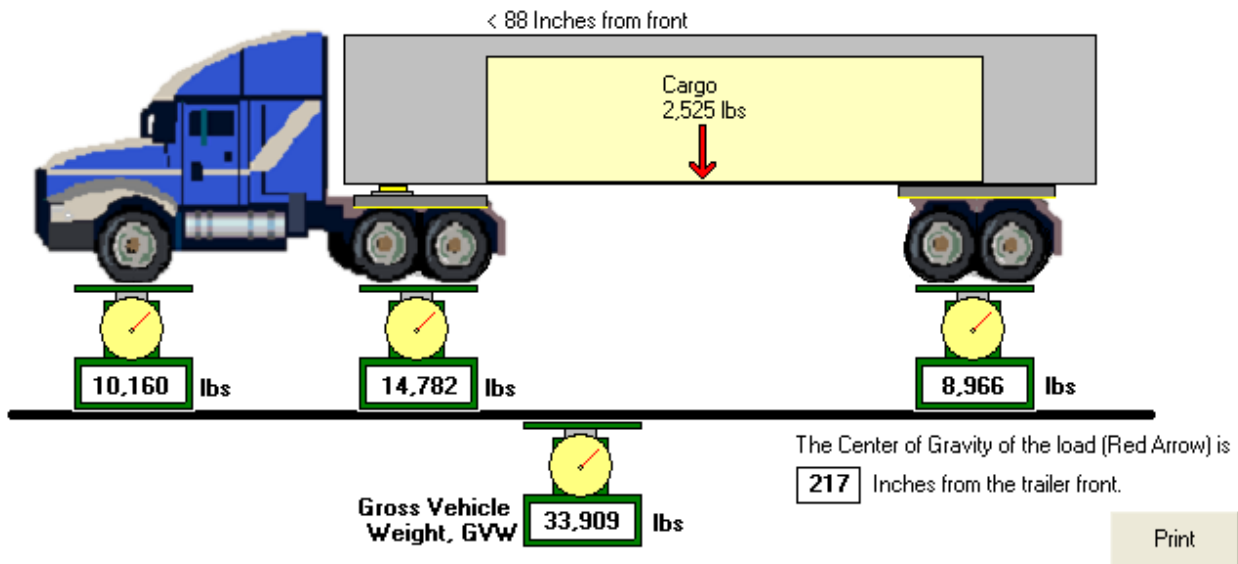
After creating a load plan the weight distribution may be examined. If there is room to shift the load, it can be adjusted here. Click "Axle Weights" on the Reports drop-down menu.



Note that the program algorithms do not consider the weight of a cargo item as they create the load plan, they are only concerned with a space-saving, compact plan. The information under the Axle Loads tab is a report of the result.



The load plan is built from the front of the trailer/container backwards. If there is room left, it is possible to shift the load by left clicking in the yellow cargo area and dragging to the right. (It is not possible to shift individual items, just the entire load.) The image below shows a resulting redistribution of the load.



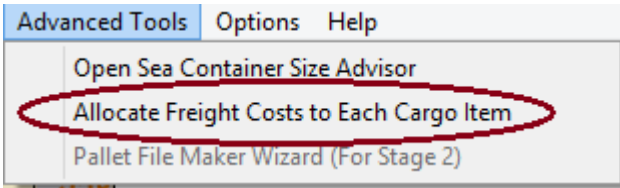
The red arrow indicates the Center of Gravity of the load. It is the single point where the load itself (without the trailer) could be picked up and be in balance. (This is slightly different than the center of gravity for the whole assembly that includes the empty trailer or container weight. This value is unreported.)

The calculated axle weights use default assumptions about the tare (trailer empty) weights of the tractor and of the trailer. If your case is significantly different you may wish to overwrite the values shown. The same is true for truck geometry items, like axle spacing and kingpin location. Changes are saved for future sessions.

The program creates a load plan without regard to safety considerations. It is the user's responsibility to make safety and suitability decisions.

Allocate Freight Costs to Each Cargo Item

When loading is complete, you can determine the freight cost for each cargo type and each cargo piece. Go to Advanced Tools on the CargoWiz menu. From the drop down choose "Allocate Freight Costs to Each Cargo Item."



A window will open, showing the percentage of freight cost per cargo row and per cargo item.

The calculations use the current shipment with all cargo loaded.

| Part Number or Short ID | Qty | Description | Total Volume (cubic feet) | Units Inside this Cargo Item | Total Units | Freight Burden by Volume | | | | | |
|-------------------------|-----|------------------------|---------------------------|------------------------------|-------------|--------------------------------|-----------------------------------|------------------------------------|-----------------------------------|--------------------------------------|---------------------------------------|
| | | | | | | PERCENT For All This Cargo Row | PERCENT For Each Cargo Item (Box) | PERCENT For Each Unit Inside (SKU) | COST Share For All This Cargo Row | COST Share For Each Cargo Item (Box) | COST Share For Each Unit Inside (SKU) |
| PT1092 | 43 | Pup Tents | 476 | 3 | 129 | 59.64% | 1.39% | .462327% | ~ | ~ | ~ |
| BG409 | 45 | Hiking Boots | 195 | 2 | 90 | 24.45% | .54% | .271673% | ~ | ~ | ~ |
| MK334 | 122 | Mess Kits, one per box | 127 | 1 | 122 | 15.91% | .13% | .130403% | ~ | ~ | ~ |

Three red arrows point upwards from the bottom of the table to the 'PERCENT For Each Cargo Item (Box)', 'PERCENT For Each Unit Inside (SKU)', and 'COST Share For Each Cargo Item (Box)' columns.

If you enter the shipping cost for the container, then click the "Calculate" Button, the "Allocate Freight Costs" feature will calculate the actual cost for each cargo type and each cargo piece.

Enter Shipment Cost (Optional)

\$



| PERCENT For All This Cargo Row | PERCENT For Each Cargo Item (Box) | PERCENT For Each Unit Inside (SKU) | COST Share For All This Cargo Row | COST Share For Each Cargo Item (Box) | COST Share For Each Unit Inside (SKU) |
|--------------------------------|-----------------------------------|------------------------------------|-----------------------------------|--------------------------------------|---------------------------------------|
| 59.64% | 1.39% | .462327% | \$1192.80 | \$27.74 | \$9.25 |
| 24.45% | .54% | .271673% | \$489.01 | \$10.87 | \$5.43 |
| 15.91% | .13% | .130403% | \$318.18 | \$2.61 | \$2.61 |

Three red arrows point upwards from the bottom of the table to the 'COST Share For Each Cargo Item (Box)', 'COST Share For Each Unit Inside (SKU)', and 'COST Share For All This Cargo Row' columns.

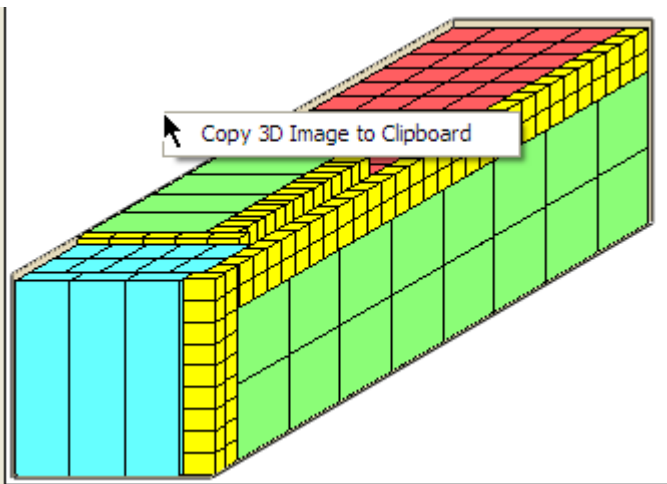
You can share this information with others by swiping the mouse across the relevant information, click "Copy to Clipboard," and paste the results into Excel or an email.

Email Images and Results

Within an email body:

For some purposes you may want to put the results right in the body of an email. (The email format must be HTML).

After creating a load, just right click on either the top or 3D view to send it to the clipboard, then paste it in the email:



Sending Reports:

Any of the reports, such as those with loading sequence details, can be saved as .pdf files and emailed as attachments. If you do not have a .pdf creator program you may want a free one from: <http://www.bullzip.com/products/pdf/info.php>

Sending the Shipment File:

Another way, if the recipient is a licensed CargoWiz user, is to save the file in the Shipments folder ("File", "Save As"), then drag that file to an email. The recipient then opens it ("File", "Open") and sees just what you saw, and could make modifications.

Send Results to Others - the Free Viewer

If the recipient only needs to see how the shipment is to be loaded:

Method 1. Have them download the free trial from our website, www.softtruck.com .

When the trial expires the program changes to a **free viewer** that may be used to open and view Shipment Files that you have emailed to them.

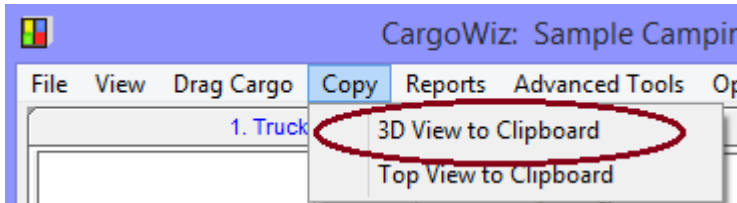
The free viewer is the same as a purchased program except that users cannot manually change any of the data in the cargo data grid. All of the reports can be generated.

(Note: Shipment Files have a .mdb suffix and most systems will remove them unless you put them in a zip file. You may also need to change ".mdb" to a different suffix, such as ".doc" Let the recipient know they will need to change it back.)

This may save the unnecessary purchase of an additional license.

Method 2. Use the copy functions on the menu bar to copy load images, or even the entire Window (With statistics and so on), to the system clipboard.

Then **paste images into an email body.**



Method 3. Create .pdf files of the reports and send them as email attachments. To do this you need a program that generates PDF files such as Adobe Acrobat. There are some free ones such as from <http://www.bullzip.com/products/pdf/info.php>

Contact Support

Our web site is www.softtruck.com

You can email us at support@softtruck.com

We are located near Tampa, Florida, USA.

Show CargoWiz Support My Result

To send a shipment file to CargoWiz Support for review follow these steps:

1. Open the shipment file in CargoWiz.
2. Go "File", "Save as" and browse to save the file to your desktop. It has a .mdb extension. (Note: Shipment Files have a .mdb suffix and most systems will remove them unless you put them in a zip file. You may also need to change ".mdb" to a different suffix, such as ".doc" Let the recipient know they will need to change it back.)
3. Then zip it and attach it to an email reply to support@softtruck.com.
4. Include a description of the situation that you have encountered.

The email address:

support@softtruck.com