

# **Barrel Item Setup**

## Summary

Before you jump into the Barrel Management Console (BMC), items must be setup. The first are

your barrel contents - which should already be setup in your system for production.

The second are the barrel shells! Let's jump in.

#### What are the most common stages or what templates should I setup?

While certainly not required to have a template & item master setup for each stage of a barrel's life cycle, it is recommended to have 2 - 3 per size & type of barrel. The most common are:

- "-NEW" for a new barrel
- "-FLD" for a filled barrel
- "-EMP" for an empty barrel

#### Why do I need to setup an item & create a template?

Excellent question! The item setup is necessary so that we can track the inventory within OBeer & OSpirits; it's also there so that we can use it on sales orders, purchase orders and other transactions. The *Barrel Item Template* is necessary because that's what tells the system that the item is a barrel and to treat it differently from say... hats.



### Item Master Data Setup & Configuration

The first step with setting up a Barrel Item Templates is to create one or more Item Master data records for the physical barrels that will be filled. To do this, you'll need to create an item master data that looks like the following screen shot:

em Master Data							
em No. Manual	BRL2000-Empty			✓ Invert	ntory Item		
escription	Empty - Barrels 53 Gal #3 Ch	ar White Oak		✓ <u>Sales</u>			
oreign Name					hase Item		
em Type	Items	<ul> <li>Brand</li> </ul>		(C) 2000		<b>_</b>	
	RM: Other	<ul> <li>Pack Ty</li> </ul>	/pe				
oM Group	Manual	Bar Code     Unit Price Primary		· Curn▼			
rice List	Connecticut						
rocess Type	None	•					
General Purchasing Data	Sales Data Inventory Data	Planning Data	Production Data	Properties	Remarks	Attachments	Batches
Serial and Batch Numbers	UPS None	V					
Active     Inactive     Advanced TTB Group	From To		Remarks				

The code is should be "BRL[]" something, like 'BRL2000' and 'BRL2000-Filled.' Description should be more detailed. The above says 'Empty - Barrels 53 Gal #3 Char White Oak.'

This item will need to be

Inventory item



- Sales item
- Purchase item
- Not batch managed
- Item Group RM: Other

All three checkboxes in the upper right of the Item Master are checked and the "Manage Item by" field is set to 'None.'

Next, you'll need to assign at least one warehouse to the barrel item. This warehouse represents the locations where barrels will be stored.

Set G/L Accounts By Item Group		Manage Inventory by Warehouse Inventory Level							
UoM Name Ea			ired (Purchasi	ng UoM)					
Weight					Minimum Maximum				
/al	uation Method	Moving Average	2						
#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available	Mi	7
1	🥪 A1	Main Warehouse		73			73		-
2	📫 BA01	Barrel Aging Warehouse		17			17		
3	🔷 BL01	Blending Tank 01		5			5		
4	📫 НТ99	Holding Tank 99		3			3	1	
5									$\Psi$
				98			98		
		4	100						

You want to setup an item for each possibility. The setup is the same for each except for the **Item Code** and **Item Description.** For the a fore mentioned three:

- "-NEW" for a new barrel BRL2000 or BRL2000-New
- "-FLD" for a filled barrel BRL2000-Filled
- "-EMP" for an empty barrel **BRL2000-Empty**



Note! You are not limited to these three states/items. These are common examples and you should have *at least* these three.

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