



# Part 1: Barrel Item Templates

This page covers the setup of the Barrel Item Templates in the Barrel Management Console section of Orchestrated.

## What is a barrel item template?

A barrel item template is how we define a barrel within OrchestratedBEER or OrchestratedSPIRITS. This is an item that represents the wood itself. Barrels have various stages of their life in production and so there are various "templates" to setup. These templates represent those stages.

## 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, its also there so that we can use it on sales orders, purchase orders and other transactions. The *Barrel Item Template* is necessary because thats 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:



Item Master Data

Item No. Manual BRL3001  
Description Barrel - New 53G - Oak  
Foreign Name  
Item Type Items  
Item Group RM: Other  
Price List CA-North  
Process Type None  
Pack Type UoM - Pound  
Bar Code  
Unit Price Primary Curr  
Brand

Inventory Item  
 Sales Item  
 Purchase Item

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Batches Attachments

Tax Liab  
 Do Not Apply Discount Groups  
Manufacturer - No Manufacturer -  
Additional Identifier  
Shipping Type Distributor Truck  
Serial and Batch Numbers  
Manage Item by None

Active From To Remarks  
 Inactive  
 Advanced  
TTB Group

OK Cancel

This item will need to be

- Inventory item
- Sales item
- Purchase item
- Not batch managed

All three checkboxes in the upper right of the Item Master will be checked and the “Manage Item by” field will be 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.

#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available	Min. Inventory	Max. Inventory
1	A1	Main Warehouse	<input type="checkbox"/>						
2			<input type="checkbox"/>						

You will also want to set up a "Used/Filled" & "Empty" version of the new barrel item(s) you setup.

Here's what that should look like:



### Item Master Data

Item No. Manual BRL3001-USED  Inventory Item  
Description Barrel - USED 53G - Oak  Sales Item  
Foreign Name   Purchase Item  
Item Type Items  
Item Group RM: Other Pack Type UoM - Pound  
Bar Code  ...  
Price List CA-North Unit Price Primary Curr  
Process Type None Brand

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Batches Attachments

Tax Liab  
 Do Not Apply Discount Groups  
Manufacturer - No Manufacturer -  
Additional Identifier   
Shipping Type Distributor Truck  
Serial and Batch Numbers  
Manage Item by None

Active From  To  Remarks   
 Inactive  
 Advanced  
TTB Group

OK Cancel



**Item Master Data**

Item No. Manual BRL3001-USED  Inventory Item  
Description Barrel - USED 53G - Oak  Sales Item  
Foreign Name   Purchase Item  
Item Type Items  
Item Group RM: Other Pack Type UoM - Pound  
Bar Code  ...  
Price List CA-North Unit Price Primary Curr  
Process Type None Brand

General Purchasing Data Sales Data **Inventory Data** Planning Data Production Data Properties Remarks Batches Attachments

Set G/L Accounts By Item Group  Manage Inventory by Warehouse  
UoM Name each Inventory Level  
Weight  Required (Purchasing UoM)   
Minimum   
Maximum   
Valuation Method Moving Average

#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available	Min. Inventory	Max. Inventory
1	A1	Main Warehouse	<input type="checkbox"/>						
2			<input type="checkbox"/>						

Set Default Whse

OK Cancel

## Barrel Management Console - Barrel Template Setup

From there, you can proceed to the Barrel Management Console. Go to Production > Production

Forms > Barrel Management Console. From there click on the Setup tab.



The screenshot shows the 'Setup' tab of the Barrel Management Console. It features three main sections: 'Types', 'Sizes', and 'Status', each with an 'Edit' button. Below these is the 'Barrel Item Templates' section, which includes an 'Add' button and an 'Edit' button. The 'Barrel Item Templates' table is as follows:

Item Code	Item Name	ID Prefix	Type	Size	Condition	Status	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5
BRL1001-EMPTY	Barrel 53G - OAK - EMPTY	ORC	Bourbon	BRL53	Used	AVL					
BRL1001-FLD	Barrel 53G - OAK - FILLED	ORC	Bourbon	BRL53	Used	FLD					
BRL1001-NEW	Barrel 53G - OAK - NEW	ORC	Bourbon	BRL53	New	AVL					

On the Setup tab, click on the Add Button in the Barrel Item Templates section. In this screen you'll enter in the item code for the first barrel item you created.

The screenshot shows the 'Setup' tab of the Barrel Management Console with the 'Barrel Item Templates' dialog box open. The dialog box contains the following fields:

- ItemCode:
- ItemName:
- ID Prefix:
- Type:
- Size:
- Condition:
- Status:
- Attribute 1:
- Attribute 2:
- Attribute 3:
- Attribute 4:
- Attribute 5:

Buttons for 'Add' and 'Cancel' are located at the bottom of the dialog box. The background shows the same 'Setup' tab as the previous screenshot, but the 'Barrel Item Templates' table is partially obscured by the dialog box.

Once the item code has been populated, you'll need to enter an ID Prefix, then select the type, size, condition, and status. You may also choose to use the Attribute fields for additional data.



**Barrel Item Templates**

ItemCode	<input type="text" value="BRL2001-NEW"/>	Attribute 1	<input type="text"/>
ItemName	<input type="text" value="Barrel Shell - Maderia - 1"/>	Attribute 2	<input type="text"/>
ID Prefix	<input type="text" value="MAD"/>	Attribute 3	<input type="text"/>
Type	<input type="text" value="Neutral Wine"/>	Attribute 4	<input type="text"/>
Size	<input type="text" value="Barrel 53"/>	Attribute 5	<input type="text"/>
Condition	<input type="text" value="New"/>		
Status	<input type="text" value="Available"/>		

The Type, Size, and Status values can all be edited on the Setup Screen of the Barrel Management Console.

To edit or remove a template, highlight the particular template row and click **Edit** to open up the barrel template window.

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