

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:



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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.

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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 No. Manual Description Foreign Name Item Type Item Group Price List Process Type General Purchasin Tax Liable Do Not Apply Discount Manufacturer Additional Identifier Shipping Type Serial and Batch Numbers	BRL3001-USED Barrel - USED 53G - Items RM: Other CA-North None g Data Sales Data t Groups - No Manufacturer -	Oak	Pack Type Bar Code Unit Price Brand Planning Data	UoM - Pound Primary Curre Production Data	♥ ♥ ♥ ₽ <u>r</u> operties	Inventory It Sales Item Purchase Iter Remar <u>k</u> s	em m Batches	Attachments
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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.



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Honey Comb	Honey Comb			BRL70	Barrel	70	2.26			FLD	Filled		
Neutral Wine	Neutral Wine									INF	Infected		
New Oak	New Oak									NC	Needs Cleaning		
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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.

	IS	_										
ItemCode	Attribute 1		0						1.00			
ItemName	Attribute 2					L	Edit		Status		E	dit
ID Prefix	Attribute 3			Name		Size			Code	Name		
	T and the			Barrel	132	4.26	~		AVL	Available		-
.vpe	Attribute 4			Barrel	53	1.71			DOS	Dosed Empty		
jize	Attribute 5			Barrel	70	2.26			FLD	Filled		
Condition	÷								INF	Infected		
Status	*								NC	Needs Cleaning		
Barrel Item Templates											Add Ed	lit
Item Code	Item Name	ID Pretix	Туре	Size	Condition	Status	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5	
BRL1001-EMPTY	Barrel 53G - OAK - EMPTY Barrel 53G - OAK - FILLED	ORC	Bourbon	BRL53 BRL53	Used	AVL ELD						
BRL1001-NEW	Barrel 53G - OAK - NEW	ORC	Bourbon	BRL53	New	AVL						

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.

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ID Prefix	MAD	Attribute 3	
Туре	Neutral Wine 🔻	Attribute 4	
Size	Barrel 53 💌	Attribute 5	
Condition	New		
Status	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 **<u>Edit</u>** to open up the

barrel template window.

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