

# ORCHESTRATED

Brand Creation

## Overview

This document covers the setup for item templates – documents that drive the Brand Creation Wizard. Then it walks through the steps for the Brand Creation Wizard (BCW). The examples are done in an OBeer Environment. More resources and information can be found at <http://support.orchestrated.com/hc/en-us/articles/218453508-Brand-Creation-Wizard-Intro-Setup-and-Creation>.

## Setup Item Templates

An Item Template is a blue print for the brand creation wizard to use. These must be setup to use the brand creation functionality.

1. Navigate to Administration > Setup > Inventory > Item Templates.
2. The Item Templates form opens. There will be some existing templates, but each one needs to be modified before it is ready to use.

The screenshot shows the 'Item Templates' window with a table of existing templates. The table has columns: Code, Pre/Suffix, Item Group, Or..., Process Type, Def Bom Whs, Pack Type, Lead Days, Lead Min, Sales Item, TTB Group, and Y. The first few rows are highlighted with yellow drill-down arrows in the 'Code' column.

Code	Pre/Suffix	Item Group	Or...	Process Type	Def Bom Whs	Pack Type	Lead Days	Lead Min	Sales Item	TTB Group	Y
Wort	W	WIP: Wort	1	Brewing	BH01	Cask 5L	0	240	<input type="checkbox"/>		10
Green Beer	GB	Items	2	Fermentation		UoM - BBL	7	0	<input type="checkbox"/>	Capture Losses	10
Dry Hopped	DH	Items	3	Dry Hopping		UoM - BBL	7	0	<input type="checkbox"/>	Capture Losses	10
Barrel Aged	BA	WIP: Barrel Aged	4	Aging	BA1	UoM - BBL	180	0	<input type="checkbox"/>	Capture Losses	10
Bright Beer	BB	WIP: Bright Beer	5	Filtration	B99	UoM - BBL	0	0	<input type="checkbox"/>	Produced by Fermentation	10
Keg 1/2 BBL	K12	Items	6	Packaging		Keg 1/2 BBL	0	0	<input checked="" type="checkbox"/>	Racked/Kegged	10
Case 6/4/12 Btl	B6412	Items	99	Packaging		Case 6/4/12 Btl	0	0	<input checked="" type="checkbox"/>	Bottled/Canned	10
Keg 1/6 BBL	K16	Items	99	Packaging		Keg 1/6 BBL	0	0	<input checked="" type="checkbox"/>	Racked/Kegged	10

At the bottom of the window, there are four buttons: OK, Cancel, Create New, and Delete Row.

3. Drill into the Wort item by clicking the yellow drill down arrow.

[illegible]

4. Edit some or all the field values in the top. These values are used as defaults for the BCW to create brand items and BOMs. It's important to note that the values for these fields can be changed for each brand as it is created. The examples below are for Wort.
  - a. Code: leave as 'Wort.'
  - b. Pre/Suffix: leave as 'W.'
  - c. Order: leave as '1.'
  - d. Item Group: select 'WIP: Wort.'
  - e. Process Type: select 'Brewing.'
  - f. Default BOM Whs: select the warehouse, typically a brew house; 'BH01.'
  - g. Pack Type: should be a unit of measure (for wort). The example here is 'UoM – BBL.'
  - h. Lead Days: '0.'
  - i. Lead Minutes: How long does it take to brew the wort? '240.'
  - j. Yield: '100,' the expected return on this item.
  - k. TTB Group: Blank because this item is not sold nor is any loss captured.
  - l. Batch Size: The typical batch size. '30' is used here.
  - m. Inventory UoM: 'UoM-BBL.'
  - n. No checks for Sales Item, Allow Yeast Scheduling, or Purchase Item.
5. Click *Add Warehouse* to add a warehouse to the grid.
  - a. Fill in the cell in the grid with the warehouse.
6. (optional) To remove a row, select the dark grey square on the left edge of the row, and click *Remove Row*.

[illegible]

7. Click *Update*.
8. Click the *Bom* tab.
9. Add an item to the list, Click *Add Item to BoM* and input the item code.
  - a. A Wort template must have at least one item in this grid (the only template that requires this). Other items may be added to the wort recipe during brand creation. A good item to choose might be a malt that is frequently used.

Item Code	Item Name	Quantity	Warehouse	Issue Method
RM5005	Malt 2-Row Bulk	1,000.00	A1	Manual ▼ ▲

Add Item to BoM Remove Row

10. Click back to the *Warehouse* tab.
11. Click *Update*.
12. Close the window.

The next set of instructions will highlight differences between the Wort template and the Green Beer template. It provides a finished example of a green beer template. The examples are guidelines, not simply values that should be matched exactly.

Green Beer:

1. Item Group: 'WIP: Green Beer.'
2. Process Type: 'Fermentation.'
3. TTB Group: 'Capture Losses.'
4. Batch Size: '1.'
5. Lead Days: Typical lead time for green beer.
6. Add warehouses, usually multiple. This mirrors the available warehouse functionality within item master data – any warehouse that this item may be stored should be added.
  - a. Don't forget that multiple warehouses can be selected at once. While selecting from the list of warehouses, shift + click to the last warehouse, then click *Choose*.

#	Warehouse Code	Warehouse Name
39	F18	F18 - Fermenter 18
40	F19	F19 - Fermenter 19
41	F20	F20 - Fermenter 20
42	F21	F21 - Fermenter 21
43	F22	F22 - Fermenter 22
44	F23	F23 - Fermenter 23
45	F24	F24 - Fermenter 24
46	F25	F25 - Fermenter 25
47	F26	F26 - Fermenter 26
48	F27	F27 - Fermenter 27
49	F28	F28 - Fermenter 28
50	F29	F29 - Fermenter 29
51	F99	Fermenter - DEFAULT
52	G501	Grain Storage
53	H501	Hop Storage
54	O501	Offsite Storage
55	R1	Retail 1
56	R2	Retail 2
57	SYS-01	SYSTEM WHSE 01

7. A BOM item is *not* needed.

Item Template

Code\*Green Beer

Pre/Suffix\*GB

Order\*2

Item Group\*WIP: Green Be

Process Type\*Fermentation

Default Bom WhsF99

Pack TypeUoM - BBL

Lead Days\*7

Lead Minutes\*0

Yield\*100.00

TTB GroupCapture Losses

Batch Size\*1.00

Inventory UoM\*UoM-BBL

☐ Sales Item  
☐ Allow Yeast Scheduling  
☐ Purchase Item

\*Required Field

?

Warehouses

BoM

Whs Code	Whs Name
F01	F01 - Fermenter 1
F02	F02 - Fermenter 2
F03	F03 - Fermenter 3
F04	F04 - Fermenter 4
F05	F05 - Fermenter 5
F06	F06 - Fermenter 6
F07	F07 - Fermenter 7
F08	F08 - Fermenter 8
F09	F09 - Fermenter 9
F10	F10 - Fermenter 10
F11	F11 - Fermenter 11
F12	F12 - Fermenter 12
F13	F13 - Fermenter 13

Add Warehouse

Remove Row

Update

Cancel

8. Click *Update*.
9. Click *Ok*.

An example for a finished half keg:

1. Notice the Pack Type is changed to 'Keg ½ BBL.'
2. TTB Group is 'Racked/Kegged.'
3. The Sales Item check box is marked.

[illegible]

**\*\*Note that not all the templates are reviewed in the above examples. You will need to set up each template that you plan to use!**

## The Brand Creation Wizard

Now, to put those templates to work:

1. Navigate to Inventory > Brand Creation Wizard.

### Step 1: Brand Setup

2. Select Create New Brand or Add To Existing Brand. The example continues as creating a new brand.
  - a. Add to an existing brand functions as an easy way create additional steps, such as dry hopping or barrel aging, for an existing brand. Steps 2-8 will be the same.
3. Input the Brand Code. This is likely a 4-digit number. Click the ellipses (...) button to the right of the field to open a list of existing brand codes. Use this to select the next appropriate brand code.
4. Input the Brand Name.
5. Input the Brand Short Name.
6. Select the TTB Proprietorship.
7. (optional) Input the Created By.

Brand Creation Wizard

Step 1 Brand Setup

☒ Create New Brand ☐ Add To Existing Brand

Brand Code: 1055 ...

Brand Name: BCW Doc ...

Brand Short Name: BCW ...

TTB Proprietorship: OrchestratedBEER

Brand:

Created By: AL

Instructions: Step 1 of 7 Create header information for new brand

Next

8. Click *Next*.

### Step 2: Production Steps

1. Select the process steps to make the brand by marking the checkbox in the Include column.
2. (optional) Change the Process Order.
  - a. Select a row in the Process Order grid and then click one of the two Move Row arrows.

Brand Creation Wizard

Step 2 Production Steps

Include Processes

Name	Include
Wort	<input checked="" type="checkbox"/>
Green Beer	<input checked="" type="checkbox"/>
Dry Hopped	<input type="checkbox"/>
Barrel Aged	<input type="checkbox"/>
Bright Beer	<input checked="" type="checkbox"/>

Process Order

Name
Wort
Green Beer
Bright Beer

Move Row

Instructions

Step 2 of 7  
Select which processes will be used in new brand and their order

Prev

Next

3. Click *Next*.

Step 3: Finished Goods

1. Select the pack types for the finished goods.

Brand Creation Wizard

Step 3 Finished Goods

Finished Goods

Name	Include
Keg 1/2 BBL	<input type="checkbox"/>
Keg 1/6 BBL	<input checked="" type="checkbox"/>
Case 6/4/12 Btl	<input type="checkbox"/>

Add Unlisted

Prev

Next

Instructions

Step 3 of 7  
Select how this brand will be packaged

- a. (Optional) If a pack type is not listed, click *Add Unlisted*.

Select From List

Code	Name
10015	Half Case 12/12oz Bottles
10020	Quarter Case 6/12oz Bottles
10035	Case 12/750ml Bottles
20020	Keg 50L
20025	Keg 30L
20030	Keg 25L
20035	Keg 20L
20050	Cask 20L
30005	Case 6/4/16oz Cans
30015	Case 8/12oz Cans
81005	Bottle 12oz
81010	Bottle 22oz
81015	Bottle 7oz

Select

Cancel

- b. Select the pack type from the list, then click *Select*. That pack type is brought into the Finished Goods grid and can be selected.
2. Click *Next*.

## Step 4: Preview

The grid takes a moment to populate, please wait.

1. Input a Def BOM Whs for the finished good(s).
2. Select the Item Group.

Code	Name	Process Type	Def BOM Whs	Pack Type	Item Group	Inventory UoM	Lead Days	Lead Minutes
W1055	Wort - BCW Doc	Brewing	BH01	UoM - BBL	WIP: Wort	UoM-BBL	0	240
GB1055	Green Beer - BCW Doc	Fermentation	F99	UoM - BBL	WIP: Green Beer	UoM-BBL	7	0
BB1055	Bright Beer - BCW Doc	Filtration	B99	UoM - BBL	WIP: Bright Beer	UoM-BBL	0	0
1055-K16	BCW Doc - Keg 1/6 BBL	Packaging	A1	Keg 1/6 BBL	FinGood: Kegged	UoM-BBL	0	0

**Instructions**

Step 4 of 7  
Preview Items to be created and make any changes to default values. This step also creates BOMs, which can be edited in step 6.

Prev Create Items

3. Review the information – most fields can be changed on this form so make changes as needed.
4. Click *Create Items*.

**System Message**

You Are About To Create 4 Items.  
Once Created, Modifications must  
Be done manually, Continue?

YES NO

5. Click *YES*.

## Step 5: Assign Warehouses

These warehouses will be available to the item once it is made.

1. Select an item in the left grid.
2. Warehouse(s) (from the item template we made earlier) will populate in the Warehouse for Item grid.
3. To add a warehouse, click *Add Whs* and a new row is created.
4. Input a warehouse or click the choose from list circle to bring up a list of warehouses where multiple warehouses can be selected.
5. To remove a warehouse, select the row and click *Remove Whs*.
6. Click *Assign Warehouses*.

**Brand Creation Wizard**

Step 5: Assign Warehouses

ItemCode	ItemName
W1055	Wort - BCW Doc
GB1055	Green Beer - BCW Doc
BB1055	Bright Beer - BCW Doc
1055-K16	BCW Doc - Keg 1/6 BBL

Add Whs  
Remove Whs

WhsCode	WhsName
BH01	Brew House 1

Assign Warehouses

Instructions

Step 5 of 7  
Select Warehouses for each created item

### Step 6: Edit BOMs

The BOM for each item is defaulted with information from the corresponding template. Now is the time to make changes to those BOMs.

1. Drill into the item by clicking the yellow drill down arrow. The item master data form opens.
2. Right Click > Bill of Materials. The BOM opens.
3. Add/remove lines as needed. Make sure the quantities listed are accurate for the yielding qty.
4. (optional) click *Show All* to open all at once.
5. Click *Next*.

**Brand Creation Wizard**

Step 6: Edit BOMs

ItemCode	ItemName	BOM Created
W1055	Wort - BCW Doc	<input checked="" type="checkbox"/>
GB1055	Green Beer - BCW Doc	<input checked="" type="checkbox"/>
BB1055	Bright Beer - BCW Doc	<input checked="" type="checkbox"/>
1055-K16	BCW Doc - Keg 1/6 BBL	<input checked="" type="checkbox"/>

Show All

Instructions

Step 6 of 7  
Drill into each item to create or edit BOMs  
Previously created items will appear in blue

Next

## Step 7: Set QC Targets

If you do not use QC, just click *Next*.

The screenshot shows the 'Brand Creation Wizard' window at Step 7: Set QC Targets. The window has a title bar with standard OS controls. The main area is light gray with a central 'Set Targets' button. In the bottom left is a 'Prev' button and in the bottom right is a 'Next' button. On the right side, there is an 'Instructions' box containing the text: 'Step 7 of 7', 'Set QC Targets on Brand Master Form'. A help icon (?) is in the top right corner.

If you use QC, click *Set Targets*. The Brand Master Data form opens. Click through the tabs and enter the data for this brand.

The screenshot shows the 'Brand Master Data' window. It has a title bar with standard OS controls. The form contains several input fields: 'Brand Name' (BCW Doc), 'Brand Code' (1055), 'Brand Short Name' (BCW), 'Brand Color Code' (a dropdown menu), and 'TTB Proprietorship' (OrchestratedBEER). Below these fields are four tabs: 'Brewing Data', 'Fermentation Data', 'Packaging Data', and 'Finished Goods Data'. The 'Brewing Data' tab is selected, showing an 'ABV' field with the value 0.00. At the bottom of the window are 'OK' and 'Cancel' buttons. A help icon (?) is in the top right corner.

## Step 8: Brand Creation Complete

There is no step 8! Click *Done*.

