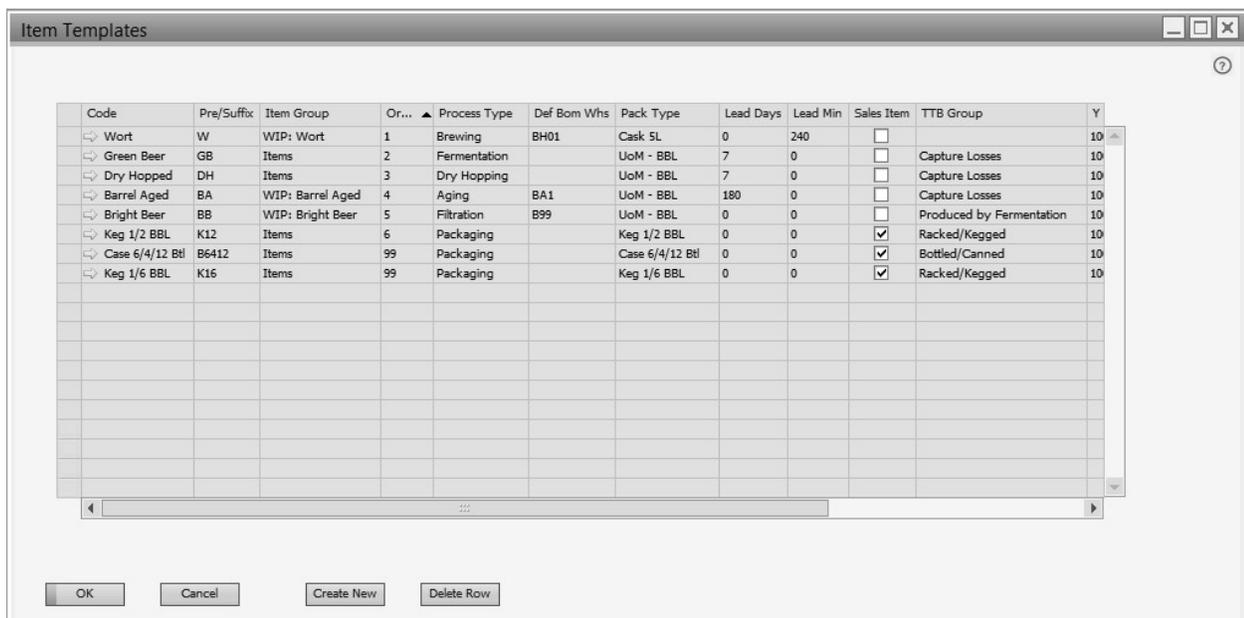# ORCHESTRATED

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.

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	☐		10
⇨ Green Beer	GB	Items	2	Fermentation		UoM - BBL	7	0	☐	Capture Losses	10
⇨ Dry Hopped	DH	Items	3	Dry Hopping		UoM - BBL	7	0	☐	Capture Losses	10
⇨ Barrel Aged	BA	WIP: Barrel Aged	4	Aging	BA1	UoM - BBL	180	0	☐	Capture Losses	10
⇨ Bright Beer	BB	WIP: Bright Beer	5	Filtration	B99	UoM - BBL	0	0	☐	Produced by Fermentation	10
⇨ Keg 1/2 BBL	K12	Items	6	Packaging		Keg 1/2 BBL	0	0	☑	Racked/Kegged	10
⇨ Case 6/4/12 Btl	B6412	Items	99	Packaging		Case 6/4/12 Btl	0	0	☑	Bottled/Canned	10
⇨ Keg 1/6 BBL	K16	Items	99	Packaging		Keg 1/6 BBL	0	0	☑	Racked/Kegged	10

OK   Cancel   Create New   Delete Row

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

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.*

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.

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. <u>Item Group</u>: 'WIP: Green Beer.'
2. <u>Process Type</u>: 'Fermentation.'
3. <u>TTB Group</u>: 'Capture Losses.'
4. <u>Batch Size</u>: '1.'
5. <u>Lead Days</u>: 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*.

7. A BOM item is *not* needed.

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.

Item Template

Code* [Keg 1/2 BBL]   *Required Field   (?)

Pre/Suffix* [K12]   Pack Type [Keg 1/2 BBL ▼]   Batch Size* [1.00]

Order* [6]   Lead Days* [0]   Inventory UoM* [UoM-BBL]

Item Group* [FinGood: Kegg▼] Lead Minutes* [0]   ☑ Sales Item

Process Type* [Packaging ▼]   Yield* [100.00]   ☐ Allow Yeast Scheduling

Default Bom Whs [A1]   TTB Group [Racked/Kegge▼] ☐ Purchase Item

Warehouses | BoM

Whs Code	Whs Name
A1	

[Add Warehouse] [Remove Row]

[OK] [Cancel]

**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.

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.
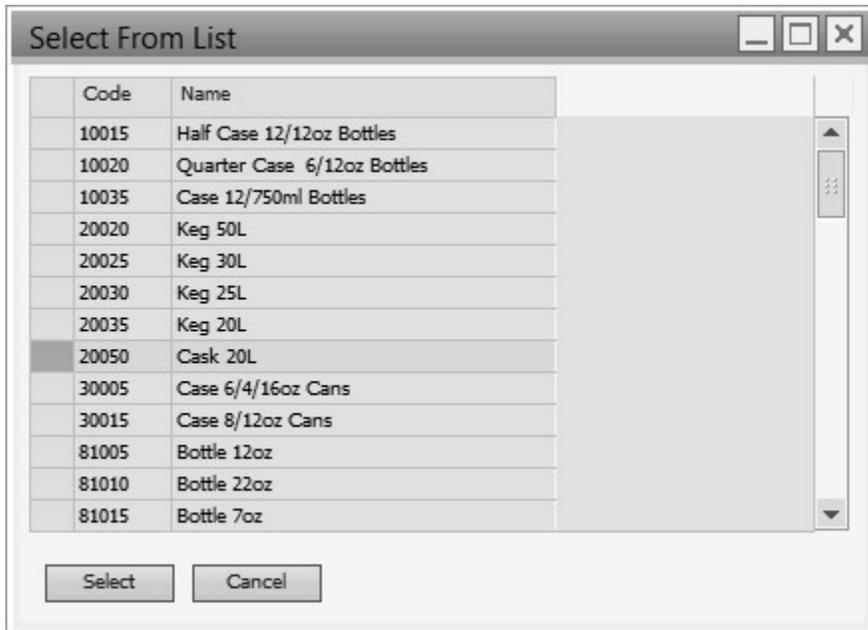   a. Select a row in the Process Order grid and then click one of the two Move Row arrows.
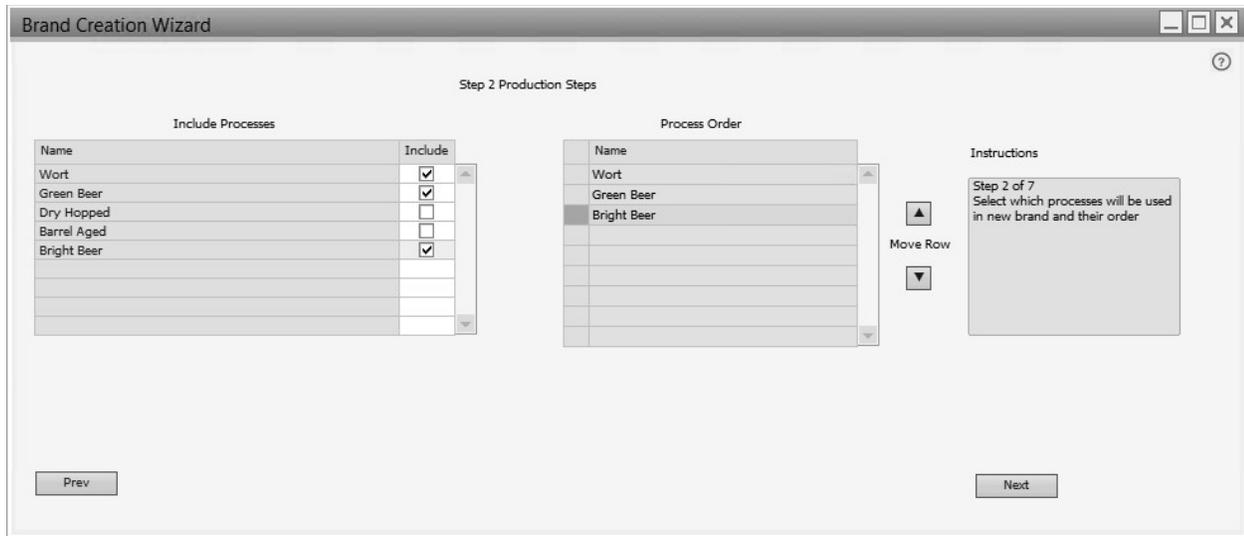
3. Click *Next*.

Step 3: Finished Goods

1. Select the pack types for the finished goods.
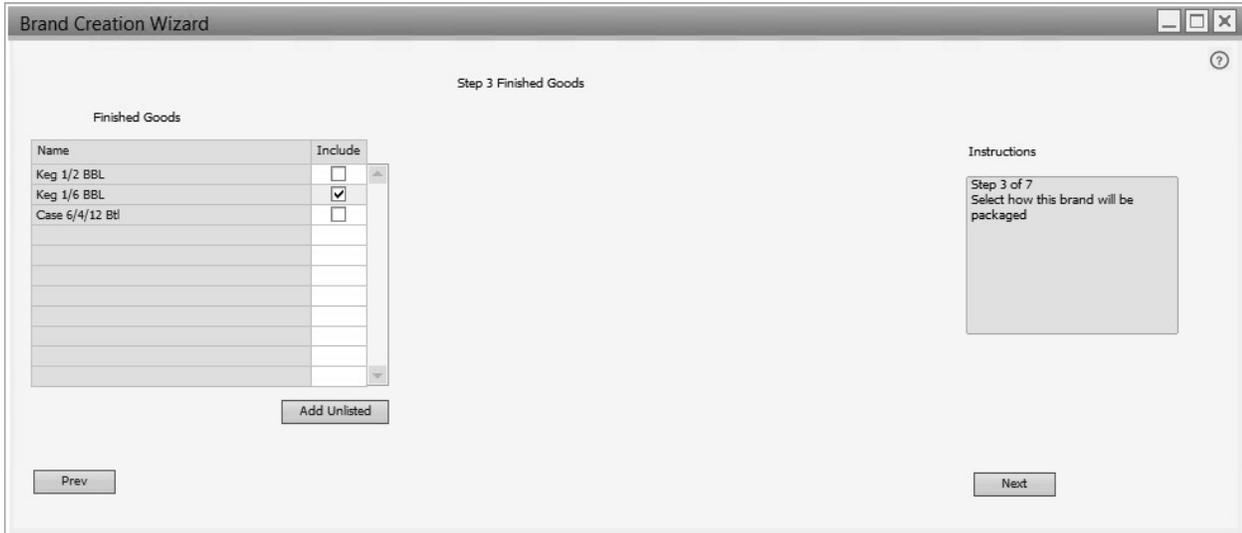
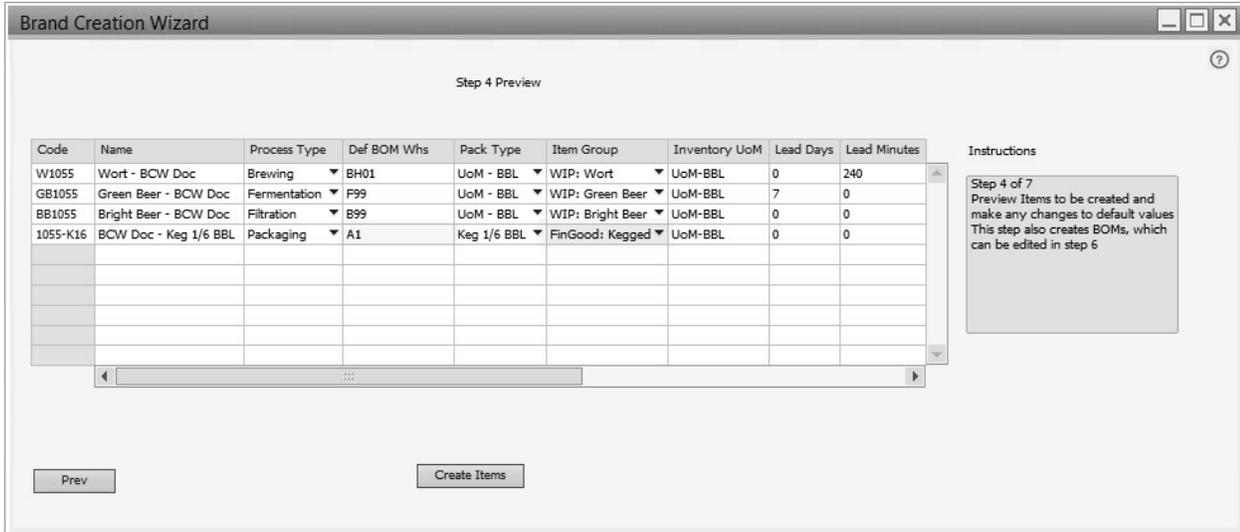a. (Optional) If a pack type is not listed, click *Add Unlisted*.

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 <u>Def BOM Whs</u> for the finished good(s).
2. Select the <u>Item Group</u>.

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

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.*
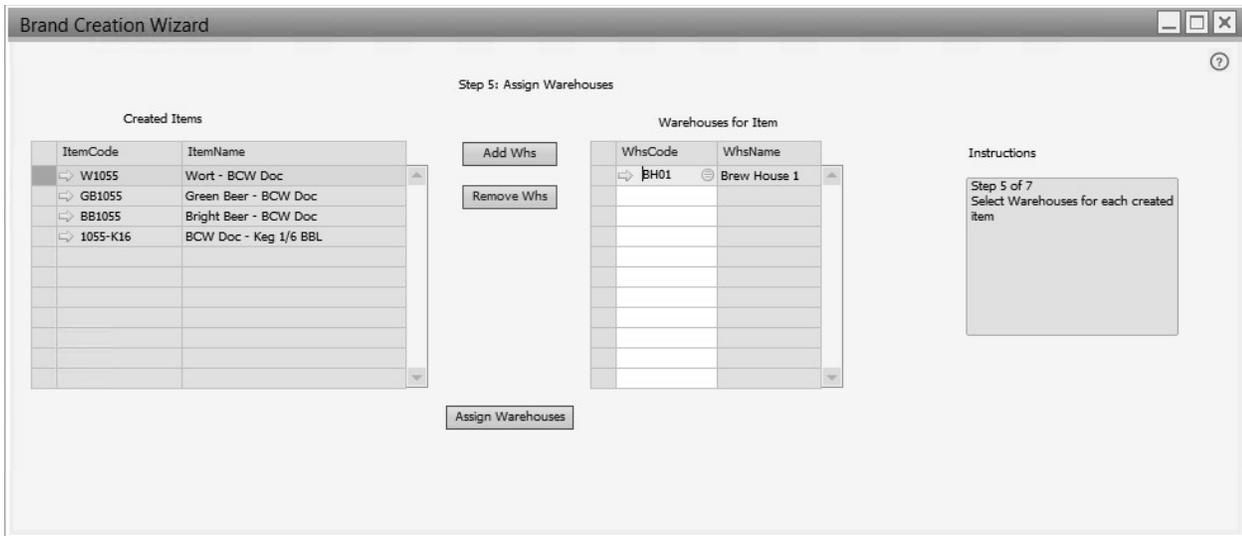
Step 6: Edit BOMs

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.
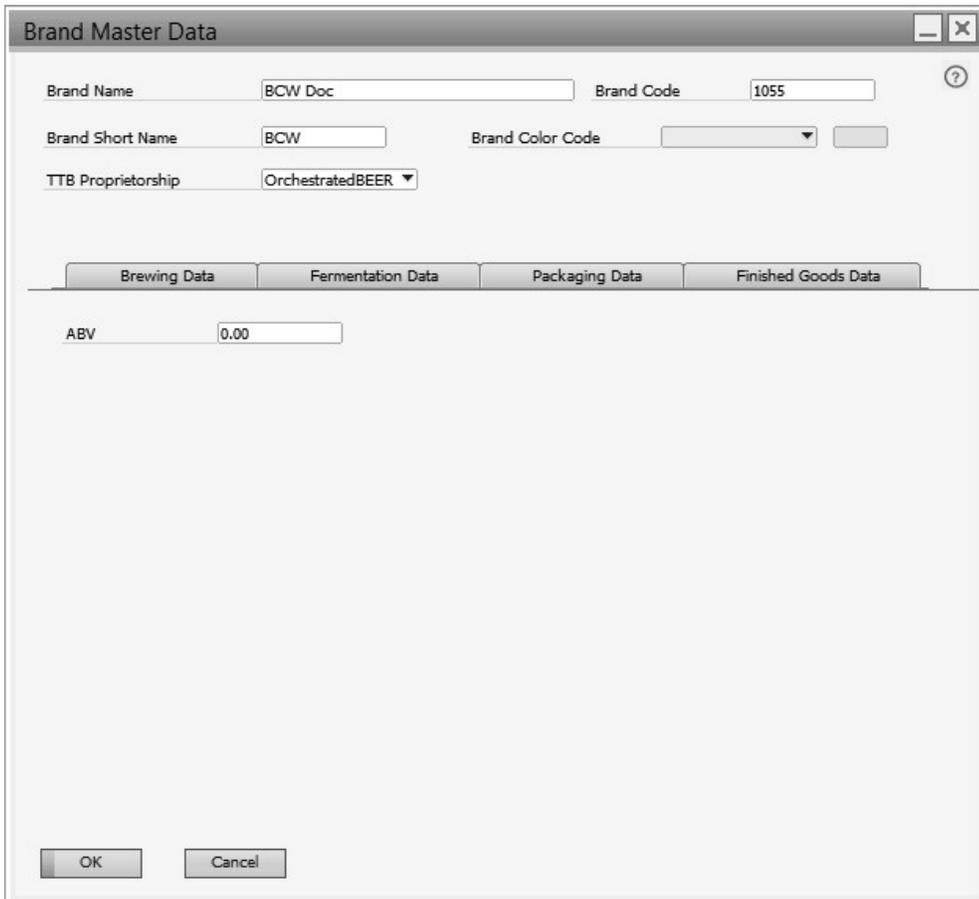4. (optional) click *Show All* to open all at once.
5. Click *Next*.
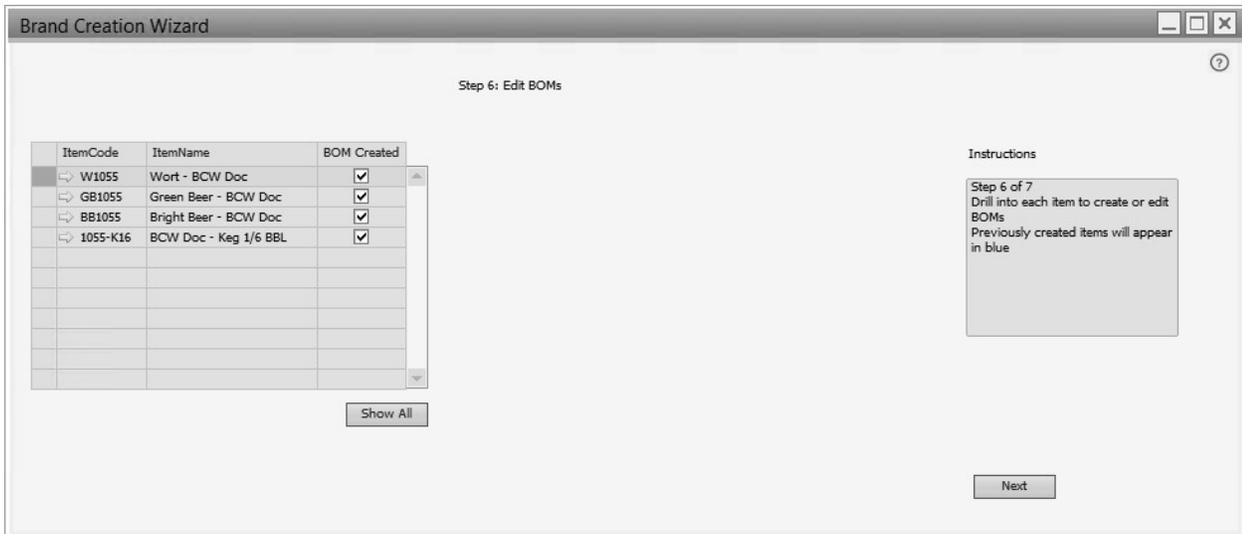
Step 7: Set QC Targets

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

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

Step 8: Brand Creation Complete

There is no step 8! Click *Done*.