

vintrace 







Some of the vintrace customer team in the booth at Unified 2020

*Left to Right: Jamie Gilchrist, Heather Crawford, Hillary Silva*

This booklet is a compilation of vintrace stories from your peers from around the globe. May these articles detailing their work inspire your problem solving and possibly spark new approaches.

Here are a few samples of what's inside:

"If you can measure it, you can manage it. vintrace is our tool by which we are measuring and managing that cost recovery, identifying waste and opportunities to improve efficiency."

*Tony Gallagher, Technology Manager, Itasca Winery, UK*

"In addition to the final blend, we can retain the trial blends we considered as well. Everything is in front of you. We see every acetic acid for the last 16 months, or wine X alcohol level for the last five years. When that data is on paper filed in a binder, it can't be effective in decision making."

*Alex Frost, Winemaker, Sextant Winery, Paso Robles, CA*

"It's great being in the cellar, standing at a tank, and being able to open up my phone and confirm the details of the wine inside or the most recent analysis. And if I've got anything thoughtful to say about the wine, I can tap it in as a note. I like the app for mobility in the cellar."

*Sam Plunkett, Owner/Winemaker, Wine by Sam, Strathbogie Ranges, Australia*

"One of my favourite features is the comprehensive reporting system. It speeds up our work, and I can organise all the reports in separate folders for easy access. This software is very robust. I feel like we have a Ferrari and are only in first gear."

*Stefano Marino, Tenute Sella Winery, Piedmont, Italy*

Whether it's been done before or a completely new challenge, please know that vintrace is here to listen and partner with you to find a solution. You can find us, and more stories like these at [www.vintrace.com](http://www.vintrace.com).

Cheers,

The vintrace team



## ■ CASE STUDY: ARRINGTON VINEYARDS

# vintrace Lets Arrington Vineyards Plan a Complicated Harvest ...and Turns an Audit from the TTB into NBD (No Big Deal)

Located about 30 miles south of Nashville, Arrington Vineyards has been producing award-winning wines since 2007. The winery has grown into a 25,000 case operation bottling 20 different wines annually.

Arrington Vineyards is a local treasure, with frequent live bluegrass performances and Tennessee BBQ served on their 100-acre property. Their Frosé (frozen rosé) by the glass program has grown from one to four margarita machines on-site. Winemaker Chase Vienneau has been there since nearly the beginning.

While consistently delivering high-quality wine is always tricky, Tennessee presents unique challenges to Vienneau and his team. Local varieties such as Chambourcin and Vignoles must endure very wet, humid summers, even dealing with hurricanes' remnants. Six inches (150mm) of rain fell on their vineyard in August alone, feeding microbes, weeds, and pests such as black rot, sour rot, botrytis, and the grape berry moth. While many hybrid varieties thrive in humid climates, others such as Vidal Blanc tend to crack open. Also, they roll out 22 miles of bird netting each season to prevent bird damage.

Vienneau put it simply, "it's like a jungle growing all the time." Vinifera varieties such as Cabernet, Chardonnay, and Sauvignon Blanc are sourced from the West Coast, creating a logistics challenge to optimally harvest and transport fruit (reds) and juice (whites) from 2,000 miles away. Vienneau and his team have great relationships with grape brokers who understand their needs, but scheduling picking and delivery are still tricky.



### vintrace Reduces Agricultural Uncertainty

vintrace users since 2012, Arrington has accumulated substantial and easily reportable data about grape conditions, Brix changes, and tonnages. Comparing the current season with vintrace generated historical reports, Vienneau now makes more accurate harvest date and tonnage estimates than his local growers. vintrace's Tank Schedule module lets Vienneau allocate space for the complex West Coast deliveries. vintrace informs him that West Tennessee grapes will arrive two weeks before his local fruit, adding "I can roll through the years and schedule better each year." And over those eight years, Vienneau appreciates that vintrace has continuously improved its software to keep up with his changing needs.

**"I can focus more time on the wine, and not so much writing and typing."**

Chase Vienneau, Winemaker  
Arrington Vineyards,  
Arrington, Tennessee

### vintrace Mobile App Makes Data Entry Easy

vintrace's new phone app lets Lab Manager Eric Ragel enter notes regarding grape and vineyard conditions directly to his phone while he is in the vineyard, commenting that "you make the note when and where

it happens." And those notes or pictures are easily searchable.

### vintrace Makes Quality Assurance Easier

While Arrington first used vintrace to provide specific wine costing more accurately, it now helps to assure wine quality and consistency. As Ragel explains, "The biggest challenge is having so many different wines, lots, tanks

and barrels. Is something going to get missed? Like an alarm clock, vintrace tells us when to do lab work, top barrels, or perform other tasks for all of our wines. It can estimate SO2 levels even if you haven't tested it." vintrace work orders explain how to do the job as well as what to do. Ragel enjoys the peace of mind that comes with a robust system like vintrace. "I can go home, leave it, and it's all there in the cloud. No misplaced lab books. And I can access it from anywhere, at any time."



As a final note on how vintrace improves wine quality, Vienneau says, "I can focus more time on the wine, and not so much writing and typing."



### Getting Started

At Arrington, they started by focusing on costing, including grapes, packaging, and additives. The vintrace team assisted with set-up and continues to provide excellent technical support for eight years. Someone in California or Australia has always been available to help, including in person.

Vienneau recommends new users start in January, as "you have time to set it up correctly, and there are fewer daily transactions to enter than during harvest."

### Audit from TTB? NBD (No Big Deal)

TTB audits are typically both terrifying and a time drain. Before using vintrace, Arrington did what all wineries without robust, centralized management software do.



They logged all wine, volumes, movements and losses, and lab analyses into binders or excel spreadsheets. If TTB came around to do an audit, the winemaking team had to slog through all those spreadsheets, logbooks, and other paperwork to produce the needed documentation.



Vienneau explains that "with vintrace, it's so much easier. All auditor inquiries about weigh tags, grape and vintage composition, losses, and growers are quickly and easily answered. If you get audited, all you have to do is click some buttons to get a report, and send an email back

to the TTB. That's fruit to bottling reports, and everything in between." Vienneau said that after a recent audit, the TTB auditor joked that "I'm gonna come back and audit you guys every year, it was so easy." ■



## ■ CASE STUDY: L'ECOLE 41

# vintrace's "New School" Technology Helps L'Ecole 41 Keep Producing Superior "Old School" Wines

Since pioneering the Walla Walla appellation in 1983, L'Ecole 41 has become one of Washington State's most prominent and successful wineries.

Winemaker Marcus Rafanelli and his team annually produce 45,000 cases of 20 different wines priced from \$14-65 per bottle.

Even with all this growth, L'Ecole 41 is committed to using traditional old-school, small-lot winemaking practices. They bring in grapes from 30 vineyards to ferment 90 separate small lots aged in 2,000 barrels. All reds are still punched down by hand in 1.5-ton fermenters.

L'Ecole 41 With so many individual lots, there is an enormous amount of data to collect and keep organized. Prior to switching to vintrace, L'Ecole used three data collection systems, each providing a partial picture.

### Wine Tracking

The L'Ecole production team used several spreadsheets to trace bulk wine and barrel movements. While this worked, it required a tremendous amount of manual data entry.

Lab Data: All historical winemaking and lab data were kept in hand-written, calendared lab journals. This retained data, but nothing was searchable. As Rafanelli described it, "It took some time to find the harvest Brix or fining treatments from a lot five years ago."



### Compliance

Historically, they had used an outdated but functioning legacy software to compile monthly 702 reports and other compliance-related activities.

So while Rafanelli had all the needed data, working with it in three separate systems became increasingly cumbersome. It was time for a comprehensive, integrated system.

L'Ecole 41 selected vintrace, as it both met their immediate needs and could grow with the winery.

### Superior Lab and Winemaking Data Collection and Reporting

Rafanelli now has strong winemaking, lab analysis data, and compliance reporting all in one place. vintrace's lab and winemaking tools make those hand-written lab journal entries obsolete, or as he says, "why do everything twice"? With mobile access via a Samsung tablet, he can display Brix and sampling data numbers come in at the moment they are entered.

### "vintrace has real tech support."

Marcus Rafanelli, Winemaker,  
L'Ecole 41  
Walla Walla, Washington

For the upcoming harvest, Rafanelli will integrate the 50-100 daily analyses from his automated Oeno Foss analyzer. And new barrels are entered digitally upon arrival to include cooper name and toast level, with bar codes replacing hand-written entries.

## Ease of Getting Started

vintrace allows a new user to begin with whatever features they need first. L'Ecole 41 chose to start with lab and wine data. With ease, vintrace staff guided Rafanelli through the how-tos of setting up wine lot codes and beginning balances. They suggested he start with bulk wines, which enabled him the flexibility to include bottled wines when he is ready.

Rafanelli is pleased with vintrace's error correction and Rollback and Reply feature. Rather than having to figure out a fix, vintrace asks, "what do you want to go back on?" and takes the lead. The program effortlessly corrects mistakes, including simple 2019 vs. 2018 typos.

## Training, Customer Service, Flexibility, and Online Learning

The vintrace team trained Rafanelli and advised him to create a structure, e.g., "How do I best organize 2000 barrels?" Their customer service team remains engaged throughout the entire journey, giving him access to real-time answers and applicable practices when needed. Located in the US and Australia, vintrace is available anytime to help.



## Start Where You Wish

Rafanelli appreciated the flexibility of starting "anywhere" and adding modules over time with vintrace. He began with lab analysis and wine composition data and is now adding harvest features. vintrace advises, "You don't have to fill in every box when you start. You can add capabilities when you are ready to use them." After the 2020 harvest, L'Ecole 41 plans to add lab journal data from previous vintages to their wine database.



## Practice Makes Perfect

Rafanelli made productive use of the vintrace "sandbox," which lets users perform operations in a live database copy. He recommends that new customers use the sandbox extensively before starting one-on-

one training to get more out of the training time.

Every growing winery faces the challenge of increasing production while maintaining high quality, small-batch standards. At L'Ecole 41, vintrace helps them do both. ■



## ■ CASE STUDY: SEXTANT WINES

# How vintrace Allows Sextant Wines To Be in Two (or More) Places at Once

Four Brands. Two Winemakers. Tracking From Grape to Bottle at Two Facilities.

Alex Frost was recently promoted to Winemaker for Sextant Wines in Paso Robles, California. Sextant has grown into an approximately 65,000 case operation producing wines under the Sextant, Paris Valley Road, Windemere, and Crooked Path brands, with several custom crush clients. They expanded into a second facility about 12 miles away. One winery does about 400-500 tons annually and is focused on smaller lots, while the other crushes about 1,000 tons in larger average lot sizes.

Over the years as Sextant grew from one facility into two, their overall tonnage more than doubled to add brands and custom crush clients. The one constant is that co-Winemakers Alex Frost and Doug Hidlinger are the guys responsible for getting the wines made, barrels organized, accurate lab and production records, chemicals ordered, and everything recorded. “By having two wineries we are able to bring in fruits of all quantities,” says Frost. “Doug can focus on the Paris Valley Road brand at the new facility, and I am primarily located on the west side at Sextant. We must work closely together to make sure that movements between facilities are tracked correctly. vintrace allows us to manage both facilities in one place, and by having real time access to movements at each facility, we are able to track easily and make the best wines possible.”



Frost has extensive vintrace experience, having adopted it at Sextant in 2016 when he was the assistant winemaker, and he is now preparing for their 5th vintrace-assisted harvest. Before vintrace, Frost handwrote all work orders – in ink- for both winery sites. As Frost put it, “the amount of paperwork was absurd. It could take hours to investigate a wine’s production and lab history. You could find a barrel that wasn’t on your Excel inventory worksheet, or vice versa. Where did it go?” With vintrace, he needs just 15 minutes to do all the topping work orders, which once took hours to write by hand. All data was kept internally on the company server instead of vintrace’s cloud-based system, which left them at the mercy of server outages.

Before vintrace, Frost kept extensive record books when transferring wine in bulk or barrel between facilities. Their accounting department would track all the transfers, manipulate figures in Excel, and then fill in government forms by hand. From a data management perspective, vintrace makes the two wineries seem like one. Now, moving barrels takes just a few clicks, and bond to bond bulk transfers are a breeze. Producing a 702

**“Without vintrace, paperwork would inundate us, and we’d be miserable.”**

Alex Frost, Winemaker,  
Sextant Wines  
Paso Robles, California

report is a click of a button instead of 8 hours of tedious work.

Most importantly, the vintrace mobile app gives Frost instant visibility from his laptop or phone to the wine history at both facilities and allows him and Hidlinger to be in lockstep. Regardless of the site location, or his destination, data is always accessible.

“When we’re tasting with winemaker/owner, we can answer any questions with real-time data. Or, we can give him the exact gallonage of a bulk lot over the phone.”

## Blending Console

Juggling his brands and varietals, Frost places a high value on the vintrace blending console. When creating trial blends before vintrace, Frost spent hours calculating the portion of wines going into potential combinations, and the delegation of the excess to allocated out. This process was time-consuming and error-prone. Luckily, the vintrace blending console instantly and accurately makes those calculations, freeing up Frost's time to discover more trial blends and optimize wine quality. He increases profitability at the same time with the feature of detailed costing – built-in by the lot. Frost also uses the vintrace “sandbox” feature to do trial blends, for example, “If we buy bulk wine at a certain price/gallon, we can see how it might affect total product cost and labeling limitations.”

For the upcoming harvest, Sextant has added vineyard and block assessment via the mobile app. Frost can enter data directly, including photos and notes, which anyone can instantly see while in the vineyard.



## More Winemaking Time

Having used vintrace for four years, Frost claims the most valuable benefit is “spending your time on wine quality, and not on data entry. Without vintrace, paperwork would inundate us, and we’d be miserable.” vintrace compiles the information that drives decision making in both the vineyard and the winery.

“In addition to the final blend, we can retain the trial blends we considered as well. Everything is in front of you. We see every acetic acid for the last 16 months, or Wine X alcohol level for the last five years. When that data is on paper filed in a binder, it can't be effective in decision making.”

While the laws of physics still prevent Frost from being in two or more places simultaneously, vintrace may have helped him move from Assistant Winemaker to Winemaker.

“Having two facilities is a blessing and a curse. There is more space for tanks and barrels, but a lot more logistics to manage. One wine lot might be on both sites.” — Alex Frost, Winemaker, Sextant Wines ■



## ■ CASE STUDY: GOLDEN STATE CIDER

# How Golden State Cider Stays Nimble and Compliant with vintrace

Tim Godfrey is the head cidemaker and a partner in Golden State Ciders in Sebastopol, CA. They have proliferated from an apple grower's 200 case experiment in 2012 to 110,000 cases in 2020, processing 5000 tons of apple juice. Not surprisingly, Golden State needed more robust systems to ensure consistent high quality once they had surpassed what Godfrey describes their initial process of "sheer force and will."

## Why Production is a Moving Target for Cider

Tank Scheduling was the most critical feature Golden State Cider needed in its production management system. Unlike brewing, which happens year-round, or winemaking which is entirely seasonal, cider making is both done year-round and seasonal. Golden State produces its Core cider line all the time. Freshly pressed bulk juice is delivered daily. Tanks are tightly scheduled from fermentation tanks to blending tanks and then to bottling tanks throughout several months. Golden State also makes Seasonal ciders, called Local Harvest and California Farm, from site-specific apples, pressed and delivered only in September and October. Seasonal ciders ferment more slowly, occupying a fermenter three times longer than a Core cider.

For cider makers like Golden State, back-orders are unacceptable, if they can't keep the retail or on-premise shelf stocked, their competitors will. So Godfrey needed a robust tank scheduling module that could plan for Seasonal ciders while keeping them in-stock on the Core line.

vintrace's Equipment Scheduler module gives Godfrey the ability to link tanks and scheduling. Godfrey stated



that this feature alone "makes vintrace worth it by itself. Like a hotel reservation system, vintrace "books" bottling, blending, and fermentation tanks based on future demand. For example, cider that needs to be packaged 60 days from now is reverse "booked" or scheduled into a bottling tank for A days, blending tank for B days, and fermentation tank for C days. This results in that specific apple juice to be delivered D days from today. Godfrey can now see when he may have available capacity and adjust for slow-fermenting seasonal ciders by reassigning the fermentation time. He couldn't do any of this with a spreadsheet.

## Work Orders Created Problems

Paperwork orders were error-prone, both in execution (a '7' can look like a '1') and in transcription from work order into the database. Human error needed to be eliminated.

## "I know vintrace is dedicated to making cider work."

Tim Godfrey  
Head Cidermaker & Partner  
Golden State Ciders  
Sebastopol, California

Golden State now has accurate digital work orders that eliminate re-entry of handwritten paperwork orders, improve data quality, and save time and money. Also, vintrace's Work Order system is improving its process

consistency. Essential standard operating procedures such as the tank cleaning regimen are pre-inserted into the work order, reducing human error, reinforcing employee training, and on occasion, avoiding a catastrophe.

## Compliance for Cider Offers Unique Challenges

Godfrey used a brewery based system, but cider production reporting is different than for beer. His system

didn't give him government compliance reporting for 702s. So he used a calculator prone to errors, or as Godfrey put it, "It's not a question of 'if' but 'how many' mistakes are you going to make?"

vintrace's Government Reports instantly and accurately creates submission-ready 702 reports. vintrace gives Godfrey a detailed file that lets him see data entry mistakes, saving his team "hours and hours, without reporting errors." Godfrey estimates that vintrace saves Golden State Ciders 3-4 full-time staff between compliance, work order generation and logging, and other administrative work.

### Accurate Reporting is Crucial in Any Enterprise

Godfrey focuses on maximizing efficiency and minimizing product losses, but his current system couldn't provide useful data, leading to the issue of "if you can't measure it, you can't fix it." vintrace's ability to report detailed loss data allowed Golden State to engage in loss reduction, reducing product losses. Godfrey could finally see the key loss drivers, or as he explains, "knowing how much and where you are losing product is 95% of the battle."



Some unexpected benefits for Godfrey included vintrace's sheer power and scalability. He initially focused on tank management, compliance, and digital work order, but now integrates many vintrace lab features.

The lab is now part of the product approval process and must sign off that a batch meets internal specs. Only then is the batch released to the canning line, making it virtually impossible to package something that hasn't been lab approved.

Vintrace gives Golden State 100% lot traceability from the lot codes printed on the cans back to the orchard that grew the apples.

Drawing on Godfrey's multi-years of vintrace experience, he offers this advice to getting started. "vintrace is powerful, so you don't even realize much of what it could do for you. Let vintrace's



team guide you and help you get critical data assembled before you start. Focus on starting with the modules that will give you the most benefit (at Golden State it was equipment scheduling) and add other parts later."

### Working with vintrace.

"As industry leaders, vintrace keeps it simple and useful for the cider industry. They've always been willing to work with us. I've spent the time with their engineering and customer service teams to make it work for our cider applications. ■



## ■ CASE STUDY: BECKER VINEYARDS

# How Becker Manages “Texas Sized” Growth and Complexity with vintrace

In Fredericksburg, Texas, Becker Vineyards has grown enormously since it released its 1500 cases in 1995. And even after 25 successful years, people still ask, “you make wine in Texas?”

The Texas Hill Country winery now produces 110,000 cases split among 30 separate wines retailing between \$22-40 per bottle. Rachel Fanning, Becker’s assistant winemaker and enologist since 2013, explained that what was once a simple operation has exploded into organizing wines kept in 80 tanks, 4500 barrels, and a case goods warehouse spread across six separate buildings. Not surprisingly, growth created complexity exceeding the capability of Becker Vineyard’s tracking systems. Their old systems had limitations and translation issues.

### Limitations

Too much walking, transcribing notes, and playing “winery hide and seek.”

In the Winery: Before adopting vintrace in 2017, when Becker’s cellar staff proceeded with barrel work, a few might be missing, leading to an instant game of “winery hide and seek” to locate them.

Fanning and several staff members would stop whatever work they were doing to search through 6 buildings and several thousand hand-labeled barrels to find the few that went missing. Similar episodes occurred with bottling supplies. Fanning noted that before vintrace, “There was a lot of walking. I always got my steps in.”

In the Vineyard: With growth, grape sourcing became more complex. Becker has estate vineyards, but most fruit comes from the Texas High Plains AVA near Lubbock, a six-hour drive. The needs of each appellation differ: It’s humid near the estate, so vine health necessitates detailed supervision. At the same time, in the distant



High Plains, monitoring means taking handwritten notes, then driving six hours back to the winery to transcribe them. That resulted in errors and data loss.

### Poor Translation = Poor Communication

Like any growing winery, Becker Vineyards became a place where separate functions formed and grew, each with knowledgeable, experienced staff. Still, each uses a different language and system to do their work. Think of an environment where the winemakers speak only Russian, accounting speaks only Portuguese, and the lab speaks only German. No amount of experience and good intentions can overcome that language barrier. So, data became siloed, and any task that requires the participation of two or more functions was laborious and error-prone.

A few examples:

**“With vintrace, we have sharing of really good information. The visibility is golden.”**

Rachel Fanning,  
Enologist,  
Becker Vineyards,  
Fredericksburg, Texas

Monthly 702 forms took several days for bookkeeping and production to accurately extract the production numbers.

Barrel location was hard to track. Cellar staff would text Fanning where they stored newly filled barrels, and she would then enter the location in her system. If

someone forgot to text her, or she didn’t log it, or either party made a data entry error, the barrels disappeared from the system, setting up a future game of winery hide and seek.

Barrel inventory didn’t automatically build to the actual wine volume, requiring significant data manipulation.

Glass deliveries. To get visibility on bottle deliveries, Fanning regularly asked their General Manager what

he ordered and when it would arrive, then log it into her bottling schedule.

With vintrace, Becker Vineyards now has a single, essentially unlimited, and integrated system that communicates in every function's language.

Fanning notes that with vintrace, "you have seven different ways to look at something. The lab worker, winemaker, finance have actionable data from whatever way they need to see it."

Some examples include:

Work orders: Fanning now keys in a work order in her language e.g., empty all 2019 Syrah lot XYZ barrels, and vintrace immediately translate that for the cellar staff to execute in their "language," e.g., empty barrels #1427-1449, located in Building 6, rows 7 and 8. Cellar staff perform the physical work and scan barrels and tanks on their iPhones. Locations are now part of the work order requiring no more cellar staff texts to Fanning regarding the location and no more winery hide and seek.

Fanning explains that "everyone knows what is going to happen today, especially during harvest. The lab and cellar teams can see tonnages, the number of trucks, varieties, vineyards, expected Brix, etc." Potential problem

lots are pre-flagged before arrival. Also, "fewer people go into and out of offices with questions or problems, and there is a lot less paper shuffled back and forth."

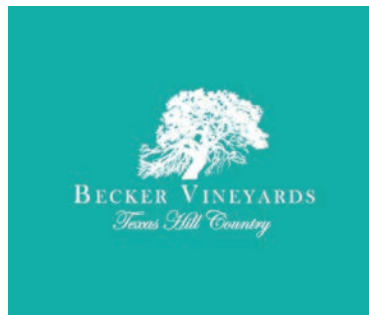
Compliance: vintrace's instantly and accurately pulls 702 reports, saving 15-25 hours of non-value-added work each month.

Bottling planning: When ordering packaging supplies, the GM enters the order (item, quantity, price, and delivery date) into vintrace, allowing Fanning to use that data in the format she needs for her bottling schedule.

Blending: Using vintrace's composition tab, Fanning and her team know the exact composition of potential blends in real-time, as well as balances that would remain for other blends.

Invoicing and accounting: Becker uses vintrace for all distributor and bulk wine sales invoicing. Accounting data such as bulk and bottled wine transfers, and dispatches to the tasting room are easily entered into an excel spreadsheet template and seamlessly uploaded into their accounting system.

Finally, in the vineyard, vintrace provides powerful solutions. Fanning enters data and notes in real-time. On her iPad, vintrace allows her to create an entirely new block while out in the remote High Plains AVA, or directly enter block-specific notes and photos related to vine health in a humid region. ■



## ■ CASE STUDY: PHASE 2 CELLARS

# Phase 2 Cellars is Streamlining a Large Custom Crush Operation for Clients and Cellar Staff

Phase 2 Cellars is a 10,000-ton custom crush operation serving up to eight clients in San Luis Obispo, California. Josh Baker, Chief Production Officer, and his team are responsible for accurately managing wines in 134 stainless steel tanks.

“Phase 2 takes pride in providing boutique quality principles in larger volumes.” — Josh Baker

Switching wine production software is not a decision any winery makes lightly. You can imagine how carefully this was considered for a facility serving 8 wineries. In 2017, after exhaustive research and due diligence, Phase 2 Cellars made the move to vintrace.

“We needed software that would provide timely visibility for our clients’ wines, that would be more intuitive to use, and give greater ownership of the process to our cellar staff.” Josh Baker

Before installing vintrace, creating accurate topping work orders for 320 separate lots in 11,000 client-owned barrels was arduous. It took the Phase 2 team eight exhausting, meticulously double-checked man-hours every three-to-four weeks. With vintrace’s production software this process was virtually eliminated.

Whether on-site or off-site, Phase 2 clients expect error-free data available in real-time. This includes lot-specific volume, tank location, and composition by varietal and vineyard, as well as complete production and lab analysis history.

Before installing vintrace, Phase 2 clients waited 8-12 hours after fruit was received to get a report. The ramification? A delay in receiving the client’s instructions when every hour matters.



“vintrace helps us provide exceptional customer service. Our clients appreciate seeing their wine data in real-time rather than waiting for someone to prepare a report in the middle of crush.” Josh Baker

With vintrace’s production software, Phase 2’s clients simply login to see everything about their wines in real-time. For example, they can see tonnage, Brix, and temperature as soon as it’s measured and entered. No need to be on-site. No waiting. No report needed.

And if a client is on-site, they simply go to their own tanks and scan them to see the wine’s history, composition, lab analyses, and enter their own tasting notes on their own devices.

Data entry transcription was eliminated by arming cellar staff with connected iPads. Baker notes, “Cellar

### “vintrace helps us provide exceptional customer service.”

Josh Baker,  
Chief Production Officer,  
Phase 2 Cellars,  
San Luis Obispo, California

staff can see right away if they need a measurement, or if they are missing a barrel, or if something isn’t right or complete.” During harvest, “Everyone from the weighmaster to the press operator has a list of what will be done today.” Baker has even replaced the ubiquitous magnetic tank board

with far more accurate vintrace driven HDTV monitors.

vintrace’s billing module also creates accurate invoices from completed work orders and contracted rates, and compliance works in a similar manner. For Phase 2, this eliminated the need for a fulltime billing and compliance supervisor.

## Key Benefits for Phase 2 Cellars

Client access provided improved visibility to their wines.

Faster reporting and decision making.

Improved team workflow, and communication.

Increased productivity.

Eliminating manual topping process.

Billing and compliance simplification and accuracy.

If you are looking to streamline a large wine operation, watch our video, or request a demo. ■



## ■ CASE STUDY: VINEYARD 29

# From overwhelmed to organized: Vineyard 29's first harvest with vintrace

Like most winemakers with too much to do during harvest, it was often a battle for Keith Emerson, Head Winemaker at Vineyard 29 – a 350 ton winery in St. Helena, California – to stay awake while typing up the next days' work orders.

After a long harvest day followed by helping my kids with homework, and getting them to bed, I am pretty tired when sitting down to write the next day's plan." And sometimes a tank would be missed in the next day's pump over list.

Keith and Assistant Winemaker Tim Mills were looking to improve productivity, data integrity and access, and avoid mistakes, while continuing to make even better wines. Keith needed "a cloud based software system that we can access from anywhere including smartphones and/or tablets, and one that communicates with TankNet." After evaluating options, Keith and Tim chose vintrace as their wine production software system. Founded in 2007 vintrace had the experience, features and supportive staff Vineyard 29 needed to confidently make the leap to a modern, mobile enabled wine making system.



Nearly every winery, including Vineyard 29, is challenged to find cellar staff, a situation that is likely to continue. Emerson knows the most enduring way to address this issue is to eliminate the work itself wherever possible, such as investing in automated pump-over devices. Using vintrace has vastly reduced the time spent making manual additions calculations, or logging hand-written completed work and lab data into a clumsy system. The happy result is that Vineyard 29 has been able to reduce its harvest crew from 4-5 interns down to just two, while giving Keith and his team more time to do higher value work in the vineyard and winery.

Vintrace requires less data entry time, avoiding the paperwork backlogs that can be as much as one week during the peak of harvest. Emerson notes that by using

**"With vintrace, I have more time to be the winemaker, to walk the vineyards, to taste the ferments."**

Keith Emerson,  
Head Winemaker,  
Vineyard 29,  
Saint Helena, California

vintrace "everything is fresh in our heads when entering data, so it goes faster and we don't make mistakes." In the lab, Vintrace improves reporting and eliminates the need for a lab tech to create reports for the winemaker. Keith explains that "we enter data directly into vintrace as we run the analyses and see those

results immediately. For instance, if Tim is running analysis and I am offsite in the vineyard or elsewhere, I can see the analysis results as he runs and enters them. Tim doesn't have stop what he is doing to prepare and send me a summary of the analysis." In the future Vineyard 29 may take advantage of vintrace's built in integrations to lab equipment and outside laboratories to further reduce data entry.

## Getting started

Unlike so many new system installation and training processes that are time consuming and fraught with errors, vintrace made it easy by providing Vineyard 29 a starting database filled with all bulk wine statistics, tank numbers and volumes, barrel types, lot codes and so on. Tim is a fan of vintrace's tutorials, which he studies at his convenience. Overall, he's found learning to use vintrace pretty intuitive. And best of all, vintrace has support staff ready to help with a live screen share, via email and over the phone.



Finally, Keith notes that “with Vintrace, I have more time to be the winemaker, to walk the vineyards, to taste the ferments. If I’m an hour away in the middle of a vineyard, I can immediately address a winery issue and write a workorder. And nothing gets lost in translation converting an oral request into a written work order.”



Most importantly, Keith is sleeping a bit more. With the important workorders already set up in Vintrace, it only takes him about 20 minutes to write up the remaining tasks from home. ■



## ■ CASE STUDY: ITASCA WINES

# Why film producer and director Malcolm Walker chose vintrace for the leading role at Itasca Wines

A long-standing passion for wine has resulted in film producer and director Malcolm Walker initiating the construction of one of the UK's newest wineries, Itasca Wines.

Having enjoyed drinking wine since he was a teenager, Malcolm's interest in the beverage has spanned the length of his career in the film and television industry, which started when he left school in the mid 1970s and saw him work on big films like Star Wars and Alien and some of the UK's most popular TV series.

After becoming "fed up" with the plethora of cooking programs on TV on "every channel from every country" compared with the very few on wine, Malcolm decided to do something about it and in 2011 his production company, Itasca Films, began shooting the first episode of Cellar Rats, a documentary series about winemakers from around the world. Beginning in Australia, subsequent episodes have been filmed in Spain, Portugal, South Africa, New Zealand and, eventually, the UK.

"To be honest I hadn't drunk a lot of English wine," Malcolm admits. "I was amazed at how the UK wine industry had taken off over the last 6-7 years. We were drinking some really nice, mostly sparkling wine. The UK wine industry really has a foothold in world wine now."

Itasca Films rents premises on the property of Penn Croft Farm, a 530-hectare estate in Crondall, Hampshire, about an hour's drive south of London. After the country's major wine regions of Kent, Sussex and Surrey, Hampshire makes up the remaining recognised vineyard areas of England along with East Anglia and South West England. Malcolm was in the carpark at Penn Croft Farm early one



morning when he ran into farm owner Simon Porter. Simon wasn't yet aware that his tenant had an interest in wine and the conversation quickly turned to the subject. It was to prove a serendipitous meeting because not only had Malcolm been debating about putting his money where his mouth is and planting his own vineyard, but Simon had been contemplating planting some vines himself.

"Simon said, 'why don't we do this together? I've got the land but you've got the knowhow, the contacts and the means to raise the money,'" Malcolm recalls.

Planted nearly two years ago, the Penn Croft vineyard contains 9500 vines across four hectares comprising Chardonnay, Pinot Meunier, Pinot Noir and Bacchus — the latter a German hybrid that has proven to be a reliable producer in the cool climes of England and makes a wine style similar to Sauvignon Blanc.

**"it's their open approach and adaptability to try and work with customers and develop solutions that are most impressive"**

Malcolm Walker,  
Proprietor  
Itasca Wine Co.  
Crondall, United Kingdom

When news of the Penn Croft vineyard spread, other local wine producers began asking Malcolm and his team if they had any wine storage facilities.

"Storage facilities are every winemaker's problem, especially with sparkling wine which matures in bottle for a couple of years," Malcolm notes. "I then

started investigating how many vineyards there were in the UK and what the storage capacity was."

A survey carried out in 2019 by Wines of Great Britain, the body that represents the grapegrowers and winemakers of England and Wales, found there are about 770 vineyards over 0.10 hectares across the two countries and approximately 165 wineries. Malcolm says that of the latter, only a dozen or so offer contract winemaking services.

“We could see a commercial opportunity for a dedicated contract winemaking service which would help cover the cost of producing our own brand.

“When I suggested to [Simon] that we look at establishing a contract winemaking service, he happened to have two old rusty barns on the property that hadn't been used for 10-15 years. So that was the ideal location given our long-term plans of a restaurant, café and cellar door, so we knocked down the barns and built our winery.”

Construction of the 1000 square metre winery began in February 2020 and was open for business by September the same year for its first vintage. The Itasca Wines crew, under the guidance of winemaker Ben Smith, processed 150 tonnes of fruit in 2020, including for 11 clients. They also processed about 20 tonnes of grapes bought for the Penn Croft label — mostly Chardonnay and Chenin Blanc for still wine — and some Pinot Noir for a rosé. Those wines are due for release in June 2021.

Just before Christmas Itasca Wines took delivery of 100,000 bottles. A bottling plant is due to arrive in mid-January 2021 followed by a fully automated disgorging line in February.

“With the tanks we've got in at the moment we could probably do up to 400 tonnes. We've been signing up clients even since harvest. We're probably looking at hitting 200-300 tonnes next year,” says Malcolm.

The Itasca Wines team soon realised they would need a robust system for managing the various batches of wine it would be processing for its clients. Malcolm and Itasca's



technology manager Tony Gallagher set off in search of such a system which led them to Vintrace.

“I noted it was Cloud and mobile based for both android and iPhone,” says Tony, picking up the story. “Malcolm, being in films, loves all things Apple and Mac. I prefer Windows and android; it is a running battle between us. But Vintrace covered both so it was ideal.”

When head winemaker Ben Smith joined Itasca, although he hadn't personally used Vintrace before, he'd certainly heard of it and knew of fellow winemakers using it.

“Ben, having come from a world of spreadsheets and paper, knew that Vintrace is what a state-of-the-art winery needed,” Tony notes.

While Ben was happy for Vintrace to help manage the making of wine at Itasca, Tony has been more interested in using it to track costs per client.

“From the finance side it is desperately important that we track the costs of every item and every operation to know where we are falling short on recovery.

“If you can measure it, you can manage it. Vintrace is our tool by which we are measuring

and managing that cost recovery, identifying waste and opportunities to improve efficiency.”

“If I was asked, can you comment on how good you're finding Vintrace, I think myself, Tony and Ben would say it's their open approach and adaptability to try and work with customers and develop solutions that's most impressive,” Malcolm says.

Tony added: “The other thing I really like about Vintrace is when you look at it and you see the way the process flows you know it's been designed by someone who knows their subject.” ■



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