

vintrace 







Heather Crawford
General Manager, North America

As 2020 comes to a close, I can't help but recognize our winery partners' fantastic efforts this past year. The challenges faced by all in recent months cannot be understated. Yet, our clients rallied. From sequestered personnel to facility closures to fires and smoke taint the logistics of processing harvests within COVID guidelines, we made it through to the other side wiser and stronger.

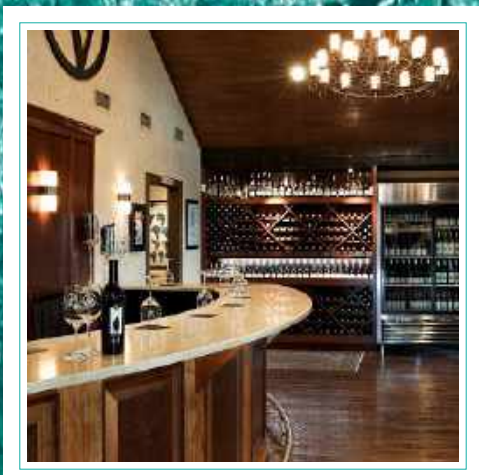
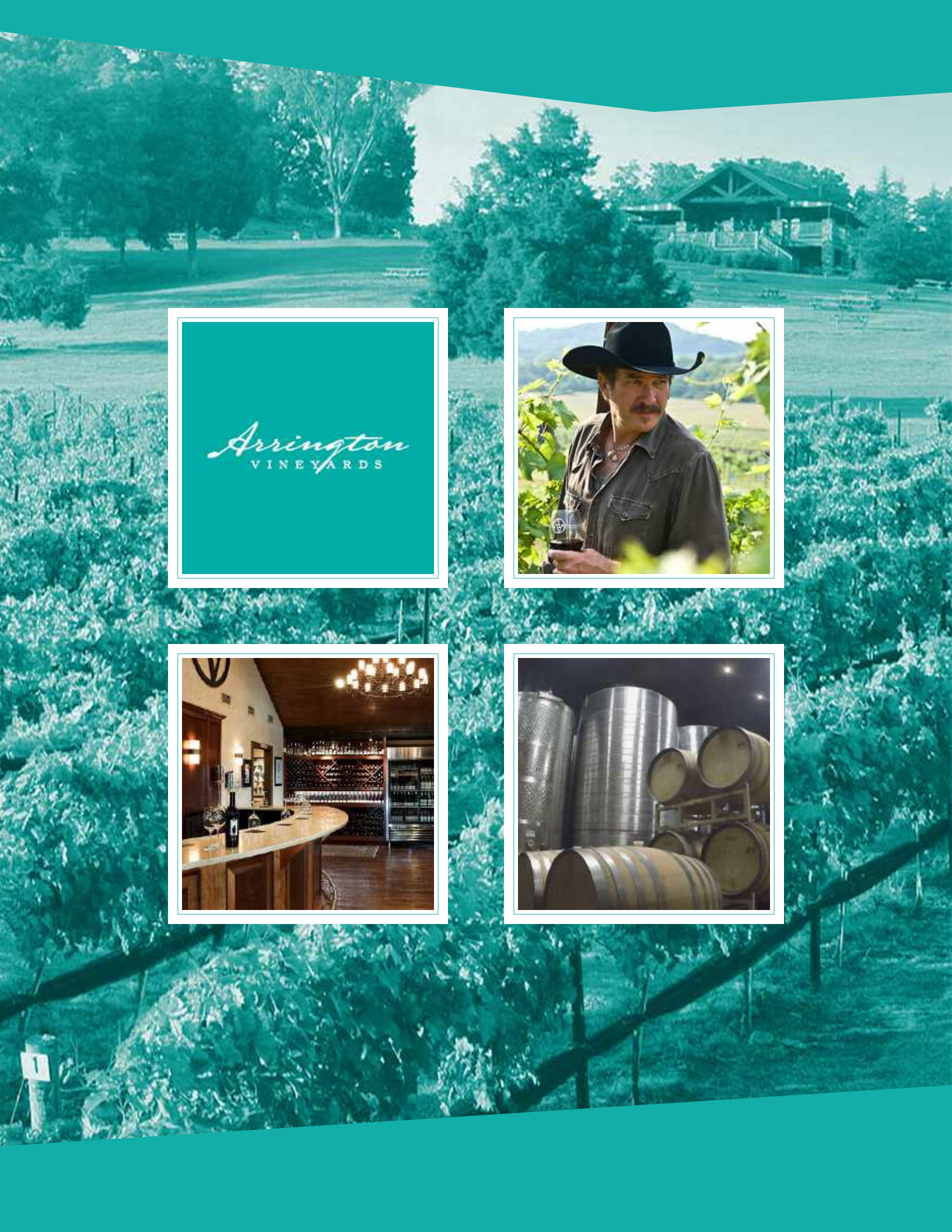
Also a year of growth, vintrace opened new offices in Europe and expanded our U.S. and Australia services to include cider. As a global company, we discovered we are truly one world, as harvest learnings in one hemisphere would help those following in another. At vintrace, we are honored to be on the production line with you, solving problems and removing barriers.

This booklet is a compilation of stories about your peers. May these articles detailing their situations and resolutions inspire your problem solving and possibly spark new approaches.

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.

Heather Crawford
General Manager, North America





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.

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."

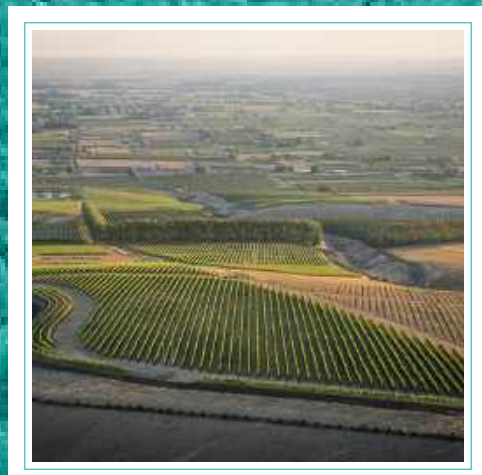


"I can focus more time on the wine, and not so much writing and typing."

Chase Vienneau, Winemaker,
Arrington Vineyards, Arrington Tennessee



L'Ecole
No. 11
WALLA WALLA VALLEY



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.

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.

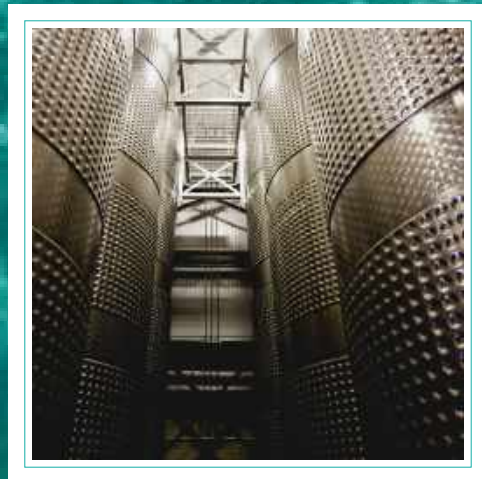
Every growing winery faces the challenge of increasing production while maintaining high quality, small-batch standards. At L’Ecole 41, vintrace helps them do both.



“vintrace has real tech support.”

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





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 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



"Without vintrace, paperwork would inundate us, and we'd be miserable."

Alex Frost, Winemaker,
Sextant Wines, Paso Robles, California





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.

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.



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

Tim Godfrey, Head Cidemaker & Partner,
Golden State Ciders, Sebastopol, CA





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:

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.



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

Rachel Fanning, Enologist,
Becker Vineyards, Fredericksburg, Texas





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 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 engagement, 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.



“vintrace helps us provide exceptional customer service.”

Josh Baker, Chief Production Officer,
Phase2 Cellars, San Luis Obispo, California





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 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.



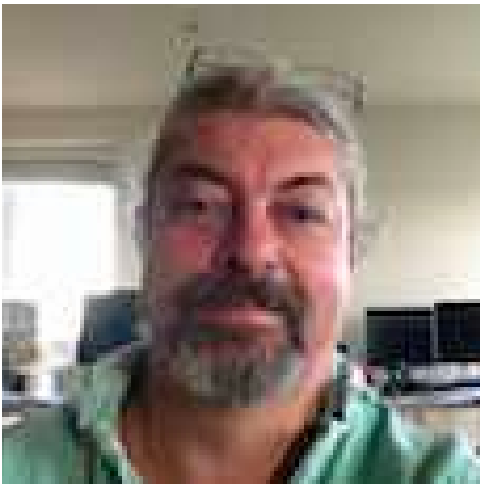
"With Vintrace, I have more time to be the winemaker, to walk the vineyards, to taste the ferments."

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





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



“What I like about vintrace is when you see the way the process flows, you know it has been designed by someone who knows their subject.”

Tony Gallagher, Technology Manager
Itasca Wine Co.

Malcolm Walker’s interest in wine started as a teenager and spans the length of his career in the film and television industry. His career began when he left school in the mid-1970s to work on major films like *Alien* in addition to some of the UK’s most popular TV series.

After becoming exasperated with the plethora of cooking programs on TV as compared with the very few on wine, Malcolm decided to do something about it. In 2011 his production company, Itasca Films, began shooting the first episode of *Cellar Rats*, a documentary series about winemakers from around the world. Malcolm first filmed in Australia with subsequent episodes created in Spain, Portugal, South Africa, New Zealand, and the UK.

“To be honest, I hadn’t enjoyed a lot of English wine,” Malcolm admits. “I am amazed at how the UK wine industry has taken off over the last 6-7 years. At the time we were drinking some nice, mostly sparkling, wine. The UK wine industry has a foothold in the world of wine now.”

Itasca Films rents Penn Croft Farm’s estate, 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 recognized vineyard areas of England and 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 planting his 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 know-how, the contacts and the means to raise the money,’” Malcolm recalls.

The result is Penn Croft vineyards, planted two years ago, containing 9500 vines across four hectares. They focus on Chardonnay, Pinot Meunier, Pinot Noir, and Bacchus, which is 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.

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

“Storage facilities are every winemaker’s problem, especially with sparkling wine which matures in the bottle for several years,” Malcolm notes. “I started investigating how many vineyards there are in the UK and what the storage capacity was.”

A carried out in 2019 by Wines of Great Britain, the body representing the grape growers 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 helps cover the cost of producing our wines.

Construction of the 1000 square meter 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 have at this time we can process up to 400 tonnes. We’ve been signing up clients even since harvest. We’re looking at hitting 200-300 tonnes next year,” says Malcolm.

The Itasca Wines team quickly realize they needed a robust system for managing the various batches of wine for its clients. Malcolm and Itasca’s technology manager, Tony Gallagher, chose vintrace.

“I noted it was cloud and mobile-based for both android and iPhone,” says Tony. “Malcolm, being in films, loves all things Apple and Mac. I prefer and Android; it is a running battle between us. vintrace works on both platforms, so it is ideal.”

Ben Smith, head winemaker at Itasca, hadn’t personally used vintrace before but knew of the technology and other fellow winemakers using it. “So, while having some anxiety about moving away from paper, he knew it is what a state-of-the-art winery needed,” Tony notes.

While Ben was happy for vintrace to manage wine production 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.”

The vintrace team has been working with Itasca Wines to integrate with an update increased tracking of sparkling wine production.

“We’ve got a batch [of sparkling] going through at the moment of 50,000 bottles, and they’re in 170 riddling cages, so that presents us with a fair old warehousing,” Tony explains.

“vintrace allows you to allocate a QR code to tanks and barrels so you can track all of them. You click on a QR code on a tank, for example, and it takes you to the spot in vintrace where it tells you what wine is in there, what additives added; basically, the whole history of the wine is behind that QR code. But you can’t do that for the tirage, riddling, and disgorging stages in sparkling yet. That’s what we’re keen for them to do for us.”

This effort to provide their clients with what they want has impressed the Itasca Wines team the most.

“When I am 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 are most impressive,” Malcolm says.





Upgrading from pen and paper to real-time digital data entry — Union Wine Co's. seventh harvest with vintrace

Union Wine Company in Oregon's Willamette Valley is quite the success story. In just 15 years, they have grown from a startup to a nearly 500,000 case (7,000 tons) operation, making wines under the Alchemist, Kings Ridge, and Underwood brands.

Going into the 2020 harvest, Union's winemaker Cheney Vidrine and Assistant Winemaker Kaitlin O'Brien faced a flourishing winery's usual challenges. While producing consistent, high-quality wine every vintage has been a massive part of their success, growth made managing the production process more challenging. Some examples:

- **The importance of following a process in sequence.** Work orders had all the instructions, but it was too easy to execute them out of order. For example, cellar workers would forget to take a tank volume measurement (tank dip) before pumping wine into or out of that tank, an irreversible error.
- **Data entry and accuracy.** A clipboard system is error-prone, as it requires creating and printing a work order, handwritten data entry, and transcription of that data into digital form. In addition to penmanship and transcribing errors, sometimes the clipboards would go missing and the data disappeared with it. Searching for a pen can delay a process. O'Brien recalled having "wine-soaked, smeared work orders left on my desk. Oh cool, now my desk smells."
- **Delays in-lab data collection impacted production planning.** Daily, one uses Brix and temperature measurements to decide when to press, rack, fill barrels. They are captured at the tank in ink on paper. But those numbers weren't visible to the winemaking team until lab personnel transcribed them many hours later.
- **Ambiguity.** Despite best efforts, it was challenging to write clear work orders. At best, the instructions created numerous questions and conversations between the winemakers and cellar staff. At worst, it led to mistakes.
- **Handoff challenges during shift changes.** The possibility of mistakes or incomplete work orders handed off to the next shift increase when communication is limited to handwritten or easily misinterpreted notes.
- **Covid-19.** Passing paperwork orders back and forth is inconsistent with 'touch-free' coronavirus prevention.

Having used vintrace for six years for other aspects of operations, in 2020, Union Wine addressed the issues above by upgrading to digital work orders and providing iPod Touch devices to all 30 cellar staff members. Improvements were immediate. vintrace's digital work order system made it easy to work sequentially and avoid errors. As O'Brien explains, "with vintrace, you have to complete the screen that requires a tank dip before you can move to the next step to pump wine."

The biggest game-changer came from cellar staff entering Brix and temperature data directly into their iPods—and therefore into vintrace—in real-time, eliminating the lab staff's need to transcribe. O'Brien said accuracy was "ten times better, plus data was in our winemaking system as soon as measured. When that rolled out, it was a celebration day!" Eliminating pen, paper, and transcription steps saved many labor hours daily.

In addition to improving accuracy and saving time, having tank data go straight into vintrace led to quicker and better winemaking decisions, and accelerating a pressing or racking operation by up to a full day.

Ambiguity was also significantly reduced. Vidrine and O'Brien had less work order related questions with cellar staff, as vintrace's work order system is quite clear. vintrace provided lot codes for the item, the team knew which additive to use.

vintrace fixed the shift handoff errors as work order progress and notes are logged in real-time, allowing the next shift to see exactly where things stood. Cellar staff appreciated the capability to upload photos directly into vintrace. A picture says a thousand words, but who has time to write a thousand words at the end of a 12-hour shift?

Union Wine's cellar team much preferred the iPad over the clipboard. Each iPad was loaded with the useful vintrace WineAdds by vintrace calculator, so they felt like they were walking around with a laptop in their pocket. The training was easy and getting rid of paper took out a Covid-19 transmission point.

O'Brien notes that "switching to iPads and digital work orders made harvest so much easier for everyone." No longer a "desk jockey" entering data all day, she had more time to physically assess incoming fruit and taste the fermenting tanks, adding that "this year I was out on the floor 90% of the time." Winemakers could see the status of work orders and fruit receipts for all three winery buildings at anytime from anywhere. Vidrine started his day a little later than O'Brien, and his iPad let him see everything going on at the winery before he arrived. The cellar team completed tasks in a more timely and efficient manner and gained greater process ownership.

And no more wine-soaked paperwork orders messing up the winemaker's desk.



"This year I was out on the floor 90% of the time."

Kaitlin O'Brien, Assistant Winemaker
Union Wine Co.



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- Manage all your cellar work and labs
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