

**Maker-to-market
software solutions
for the modern
wine industry**



vintrace
by ENCOMPASS



A better way to make wine

vintrace wine production software saves time so you can focus on your craft, collaborate with your team from anywhere, and gain intelligent insights for faster decision-making.

vintrace and Winemaker's Database (WMDB) recently joined forces with Encompass Technologies to support an ongoing mission to digitally connect the modern beverage supply chain. Through SaaS and technology solutions that streamline operations and simplify decision-making, Encompass and vintrace are working to equip the modern beverage industry for success in today's fast-changing market. This guide is a resource to learn more about how you can use vintrace to improve your business operations.

Inside this guide:

- State of the industry
- Introduction to vintrace wine production software
- vintrace capability showcase
- Winery's favorite features
- Case Study: Sextant Wines
- Case Study: Arrington Vineyards
- Understanding costing: Do you know the exact cost of a bottle of your wine?
- APIs and integrations to sync with your business
- Custom crush management that streamlines client collaboration
- Leveraging vintrace before, during & after harvest
- The human variable

The state of today's beverage industry is complex... And in the world of wine? Even more so.

Shifting consumer behavior is disrupting the beverage space more than ever before. For wine producers, this means more competition, more complexity, and a more difficult path to market. Wineries across the world are joining the modern beverage industry to meet these challenges head-on. For some, this means scaling up operations to reach more consumers precisely where they are. For others, it's about expediting manual processes between vineyard and bottle to create the highest quality wine they can be proud of.

Future-proofing a winery is now driven by data and technology. Powerful tools exist to help you maximize efficiency, save time, and focus on what matters most: making great wine.

The modern wine industry is here, and in order to remain competitive in an unpredictable industry landscape, data and technology are more essential than ever. The door to the modern wine industry is open with vintrace... thousands of daily users and 800+ wineries all over the world have walked through to find immense success on the other side.



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vintrace puts the power of real-time information at your fingertips - and from anywhere with the mobile app. By delivering insights, you can make more informed decisions that improve your winery's operations.

"I can roll through the years and schedule better each year. I also appreciate that vintrace has continuously improved its software to keep up with my changing needs."

- Chase Vienneau
Winemaker, Arrington Vineyards

vintrace opens access to:

- Complete visibility over harvest bookings, wine, and work orders
- A comprehensive view of your facility with a powerful tank map and management feature
- Ability to create trial blends
- Mobile app with accessibility for iOS and Android users
- One-click, pre-filled TTB reporting
- End-to-end traceability meeting all FDA HACCP
- Costing to inform profitable pricing decisions and cash flow reporting
- Scalability to handle multiple locations, custom crush, sparkling programs, your growing workforce, DSP management, and more!

*"Government compliance was an arduous task. We wrote it all down on ledgers. It was one person's job for an entire week. From **40-hours**, now it takes **five minutes**."*



- Joy Merrilees
VP of Production, Shannon Family of Wines

Pricing plans:

Whether you produce 5k cases, 500k cases, or 5 million+ cases for any number of wineries, vintrace has a plan that will fit your budget. Easy, cost-effective upgrade packages are available to ensure you have all of the necessary functionality to support your business as you scale.

Trusted by winemakers worldwide since 2007, vintrace amplifies success for wineries spanning:

- Small Estate
- Estate
- Custom Crush
- Enterprise

vintrace supports permission-based security and single-sign-on technology to support wineries in having a safer operation. Additionally, vintrace maintains SOC compliance to ensure its customers and data are safe.



SOC 1 - Types 1 & 2 compliance

Indicates vintrace's ability to effectively communicate information about our risk management & controls framework that mitigate risks to your financial reporting.



SOC 2 - Types 1 & 2 compliance

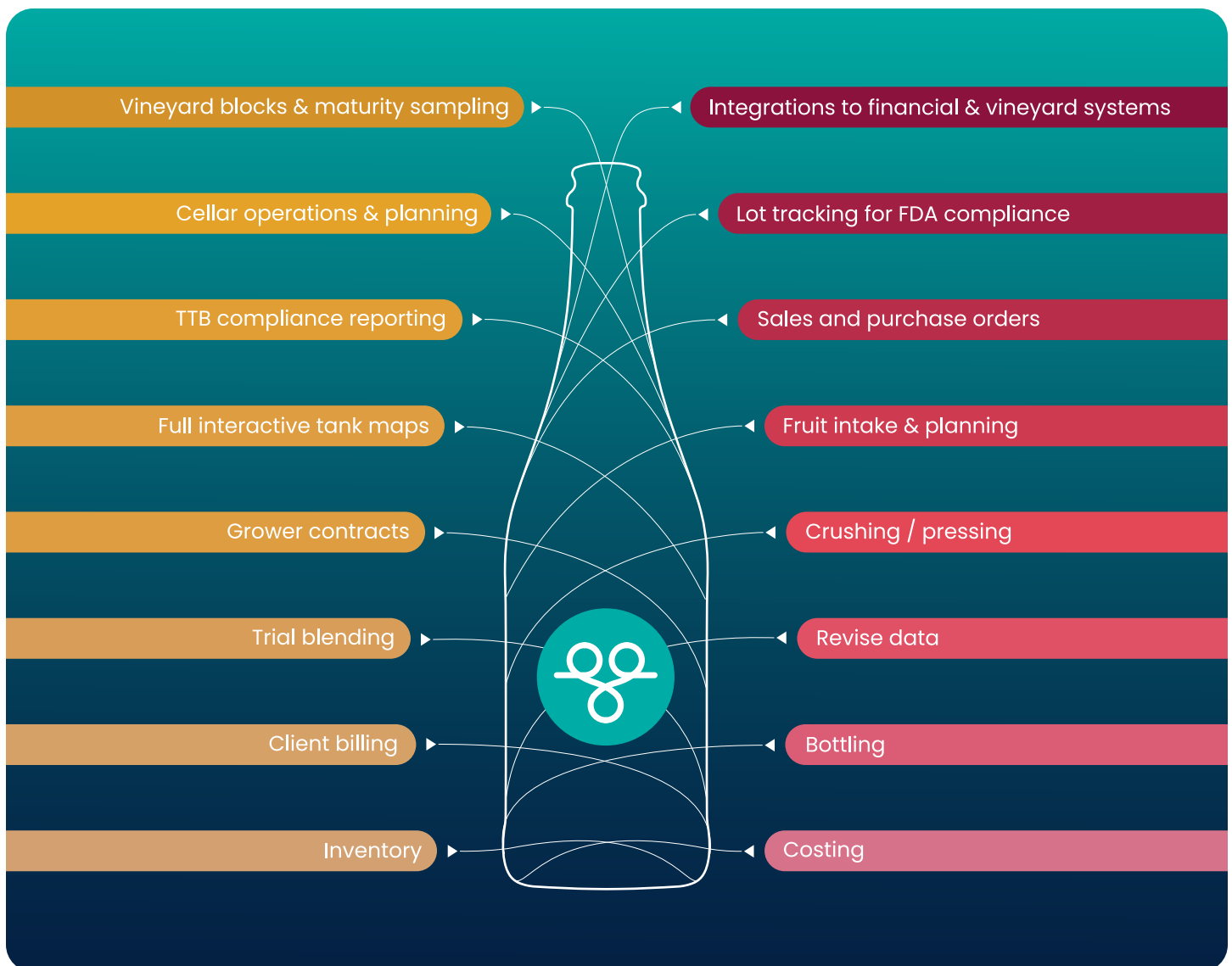
Indicates that vintrace maintains a high level of information security. Strict requirements, which are tested via regular audits, help ensure sensitive information is handled responsibly.

Capability showcase

Global winemakers have crushed, tracked, and processed more fruit in vintrace than any other winemaking software, making it one of the most trusted solutions for winemakers worldwide.

vintrace-enabled teams have the choice to use the full desktop version that is

browser enabled or a variety of on-the-go devices like iOS or Android smartphones, tablets, and industrial-strength scanners. Multiple logins are also provided so each team member can track and manage the process from grape to bottle.



Every vintrace capability is designed to meet the needs and overcome the challenges faced by wineries of any size.



Top 3 vintrace features that have elevated success for wineries in the modern beverage industry

Your winery is unique. The people and processes you rely on to ensure everything is running smoothly are important. Cloud-native software is the first step toward maximizing efficiency and bringing your winery into the modern beverage industry.

From grape to bottle, wine production software helps you align people and processes as you leverage software to become an efficient, knowledge-driven organization.

The result is more time, smooth processes, and an opportunity to boost sustainability by digitizing manual, archaic processes so you can focus more on what you do best: making remarkable wine.

vintrace is wine production software with capabilities that serve 800+ wineries of all sizes and take the tedious and disconnected manual work out of day-to-day operations.

1. Costing: Gain a comprehensive vision of your costs from fruit to finished product

Managing your costs in a spreadsheet or antiquated software can be, well... costly. Without a complete understanding of the money you're spending on each product you produce, there is always the looming possibility of inaccurate cost tracking. The availability and scope of costing in vintrace can drive smarter business decisions for employees with a finance-first mindset.

The result of leveraging vintrace costing capabilities for finance teams include:

- Reliable COGS at the end of each batch and easy editing of any costs associated with any batch
- Permission-based access that enables the right people to see and manage cost info
- Insight into money movement to identify areas where calculated investments and improvements can be made
- Data to inform how to meet industry pricing standards in a cost-effective way without sacrificing the quality of your wine

Winemakers' data management is simplified with the ability to track costs throughout all purchases and processes without having to weed through spreadsheets to find answers that might or might not be correct.

vintrace optimizes costing efficiency and accuracy by allowing finance teams to layer in overheads with powerful cost allocation tools.

The result of leveraging vintrace costing capabilities for winemakers includes:

- Simplified communication with finance teams
- Intuitive data entry and output
- Calculate trial blend costs before making costly blending decisions, or mistakes
- Cost management that doesn't interrupt workflows
- Confidence in how various winemaking decisions influences sales and distribution

With dedicated cost management touch points spanning fruit, overhead, storage, cellar work, additions, freight, bulk wine, packaging, and other (for those things that might not be categorical), winemakers and finance teams can reap the benefit of end-to-end cost analysis and definitive numbers to drive smarter spending, seamless workflows, and cost-effective operational improvements.



2. Real-time data: Access and manage the data you need, whenever, wherever

Legacy software, spreadsheets, and paper notebooks are temporary problem solvers for wineries. However, in the modern wine industry, disconnected tech solutions and spreadsheets prevent you from future-proofing your business at scale. Cloud-native software enables you to instantly input and access data from mobile or desktop devices, whenever, wherever.

Rather than trying to remember what you meant when deciphering the chicken scratch cobbled onto paper while recording brix and temp on a tank, you can use vintrace to scan the tank and enter the results to get to the lab and winemaking team immediately. Or, integrate your tank monitoring system to vintrace to automate this information.

With vintrace data management you'll gain access to:

- Quick and accurate communication across all teams without losing anything in translation (powerful for wineries to turn tanks faster)
- Accessibility from anywhere with multi-device functionality (powerful for communication across teams and locations)
- Real-time data enables powerful, quick, and accurate report generation

Instead of recording your data at the end of the day or week, you can enter it in real time to maintain data integrity and increase productivity. Now is the time to consider leveraging a software solution that supports information accessibility from vineyard to winery - and everywhere else your business takes you.

3. Visibility and tracking: processes management tools that make the workforce more efficient

When you work with disjointed systems, managing end-to-end workflows gets complicated. Wineries using vintrace find that it takes the guesswork out of process management.

The ability to use historical data enables you to mimic your best work. Past success and actionable information

help create SOPs (standard operating procedures) that ensure consistency and high-quality results.

In vintrace, visibility and tracking ensure you can create or optimize SOPs using tools like:

- Work order management: Template your standard processes with SOPs and standard protocols to simplify writing work orders. Easily cross-reference data to ensure accuracy, build additive templates that can expedite new work order writing, and calculate values to take the math out of the equation
- Compliance reporting: Forget weeding through disconnected and inaccurate data and rely on vintrace to automate TTB reports and eliminate the headache from any compliance audits that might come your way
- Reporting: Fields for entry whenever you need them, access to real-time data, and a comprehensive view of historical winemaking help you channel all of the important information from grape to bottle into reports

Visibility is a key element to your success, and tracking end-to-end processes helps you see the entire winemaking process more clearly.

With the combination of powerful data and a desire to use it you can move from simply getting the job done to consistently getting it done right.



Sextant Wines shares how they stay agile, save time, and easily manage multiple locations



“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

Sextant is a 65,000+ case operation, producing wines under the Sextant, Paris Valley Road, Windemere, and Crooked Path brands, with several custom crush clients. Over the years, as Sextant grew from one facility into two, their overall tonnage more than doubled to add brands and custom crush clients. One winery does approximately 400-500 tons annually and is focused on smaller lots, while the other crushes about 1,000 tons in larger average lot sizes.

Sextant Wines shifts from ink to innovation, using vintrace to save significant amounts of time

At Sextant Wines, it used to take countless hours to get the wines made, barrels organized, lab and production records accurate, chemicals ordered, and data recorded at every step. Sextant adopted vintrace in 2016 to simplify these processes. Before vintrace, the Sextant team hand-wrote all work orders – in ink – for both winery sites. They also manually kept extensive record books when transferring wine in bulk or barrel between facilities.

Time spent topping work orders changed significantly after Sextant implemented vintrace.

Before vintrace: *Topping work orders could take all week*

After vintrace: *Topping work orders only takes Sextant 15 minutes*

From a data management perspective, vintrace forms a cohesive system, uniting the two wineries into one seamless operation. vintrace saved Sextant significant amounts of time previously spent on manual tasks like moving barrels, bond to bond bulk transfers, and creating 702 reports.

Task time requirements before vintrace:

- Moving barrels: up to 1 full day
- Bond to bond bulk transfers: up to 1 full day
- 702 reports: produced in 8 hours

Task time requirements after vintrace:

- Moving barrels: less than 1 minute
- Bond to bond bulk transfer: 5 seconds
- 702 reports: produced instantly

Sextant Wines improves mobility and accessibility with vintrace’s cloud-based system

The Sextant accounting department used to track all the transfers, manipulate figures in Excel, and fill in government forms by hand. All data was kept internally on the company server, which left them at the mercy of server outages.

The cloud-based vintrace system enables Sextant to access data and useful features from any device. The vintrace mobile app gives Sextant Wines instant visibility into the wine history at both facilities from a laptop, phone, or tablet, to help the team remain in lockstep. Regardless of site location, real-time data is always accessible.

Sextant Wines maintains peak performance with these key vintrace features

Blending Console: Sextant used to spend hours calculating the portion of wines going into potential combinations. The blending console enables them to make those calculations instantly and accurately, freeing up time to explore more trial blends and optimize wine quality.

Sandbox: Sextant used to spend a significant amount of time to make informed purchasing decisions. Sandbox helps them gain visibility into the bigger picture by estimating the outcome of total product cost and labeling limitations.

“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.” – Alex Frost, Winemaker, Sextant Wines

Mobile App: For the upcoming harvest, Sextant has added vineyard and block assessment via the vintrace mobile app. They can directly enter data from any device, including photos and notes, making it instantly accessible to anyone at the vineyard.







Arrington Vineyards Leverages vintrace to Work Through Unique Geographical Challenges



Consistently delivering high-quality wine is always tricky.

Tennessee's location and climate present unique challenges to Winemaker Chase Vienneau and his team at Arrington Vineyards.

Six inches (150mm) of rain fell on their vineyard in August alone, feeding microbes, weeds, and pests. Local varieties such as Chambourcin and Vignoles must endure very wet, humid summers, and even the aftereffects of hurricanes. While many hybrid varieties thrive in these humid climates, others such as Vidal Blanc tend to crack open.

Additionally, sourcing Vinifera varieties such as Cabernet, Chardonnay, and Sauvignon Blanc from the West Coast, creates 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.

Arrington Vineyards relies on vintrace to help:

Reduce agricultural uncertainty: Arrington has accumulated substantial and easily reportable data about grape conditions, Brix changes, and tonnages. The vineyard compares the current season with historical reports generated with vintrace to make more accurate harvest date and tonnage estimates than its local growers.

Allocate space for complex deliveries: vintrace's Tank Schedule module helps Arrington Vineyards allocate space for the complex West Coast deliveries. vintrace informs Arrington Vineyards that West Tennessee grapes will arrive two weeks before his local fruit.

"I can roll through the years and schedule better each year. I also appreciate that vintrace has continuously improved its software to keep up with my changing needs." – Chase Vienneau, Winemaker, Arrington Vineyards

Simplify data entry: The vintrace Mobile App enables Lab Manager, Eric Ragel, to enter notes on grape and vineyard conditions from his phone while he is in the vineyard.

Optimize quality assurance: vintrace work orders explain how and what is required to most effectively do the job, creating peace of mind for Arrington's leaders. While Arrington first used vintrace to more accurately provide specific wine costing, they have progressed to assuring wine quality and consistency.

Data accessibility helps Arrington Vineyards easily navigate TTB audits

TTB audits are typically both daunting and a time drain. Before using vintrace, Arrington logged all wine, volumes, movements, losses, and lab analyses into binders and Excel spreadsheets. When TTB came around to do an audit, the winemaking team had to slog through all those spreadsheets, logbooks, and paperwork to produce the proper required documentation.

vintrace decluttered the necessary materials and made important data readily-accessible. When TTB did an audit, Arrington easily answered inquiries about weigh tags, grape and vintage composition, losses, and growers. As a result, Arrington Vineyards is no longer worried about TTB audits derailing day-to-day processes.

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

– Chase Vienneau, Winemaker, Arrington Vineyards



vintrace costing

Flexible enough for each finance team to do it their way. Powerful enough to improve pricing decisions. Invisible enough to be effortless.

Do you know the exact cost of a bottle of your wine?

From in-depth cost analysis of specific spending to a holistic understanding of your COGS, you can use vintrace to expertly manage your winery's costs. Users find that vintrace costing features make their cash flow management easier, costing data more accessible, and maximizes profitability and pricing decisions.

Expert costing tools and reporting

Detailed analytics and reporting tools enable better decision-making based on real-time data, COGS, and trends in winemaking operations. Ultimately, expert costing helps you make better investments in the winemaking process, pinpoint areas to find cost savings, and inform pricing and distribution decisions.

Available costing tools in vintrace:

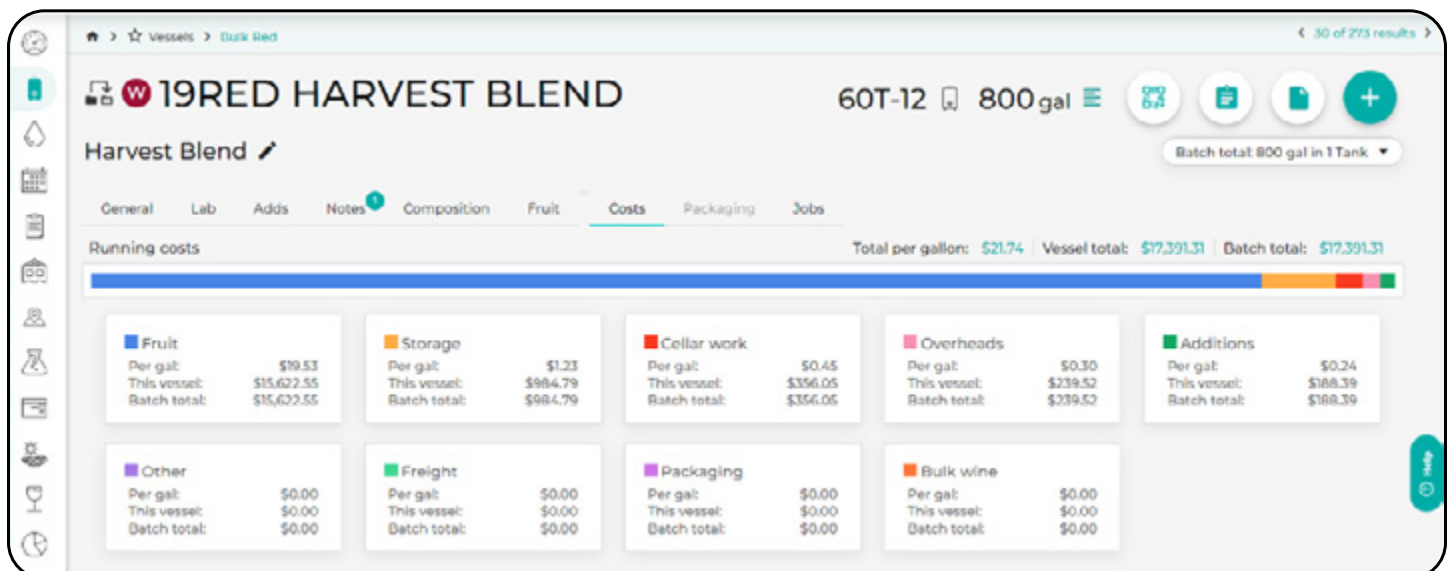
- Crush
- Cellar
- Lab
- Bottling
- Grower contract
- Fruit
- Overhead
- Inventory
- Client billing
- Ad-hoc
- And more

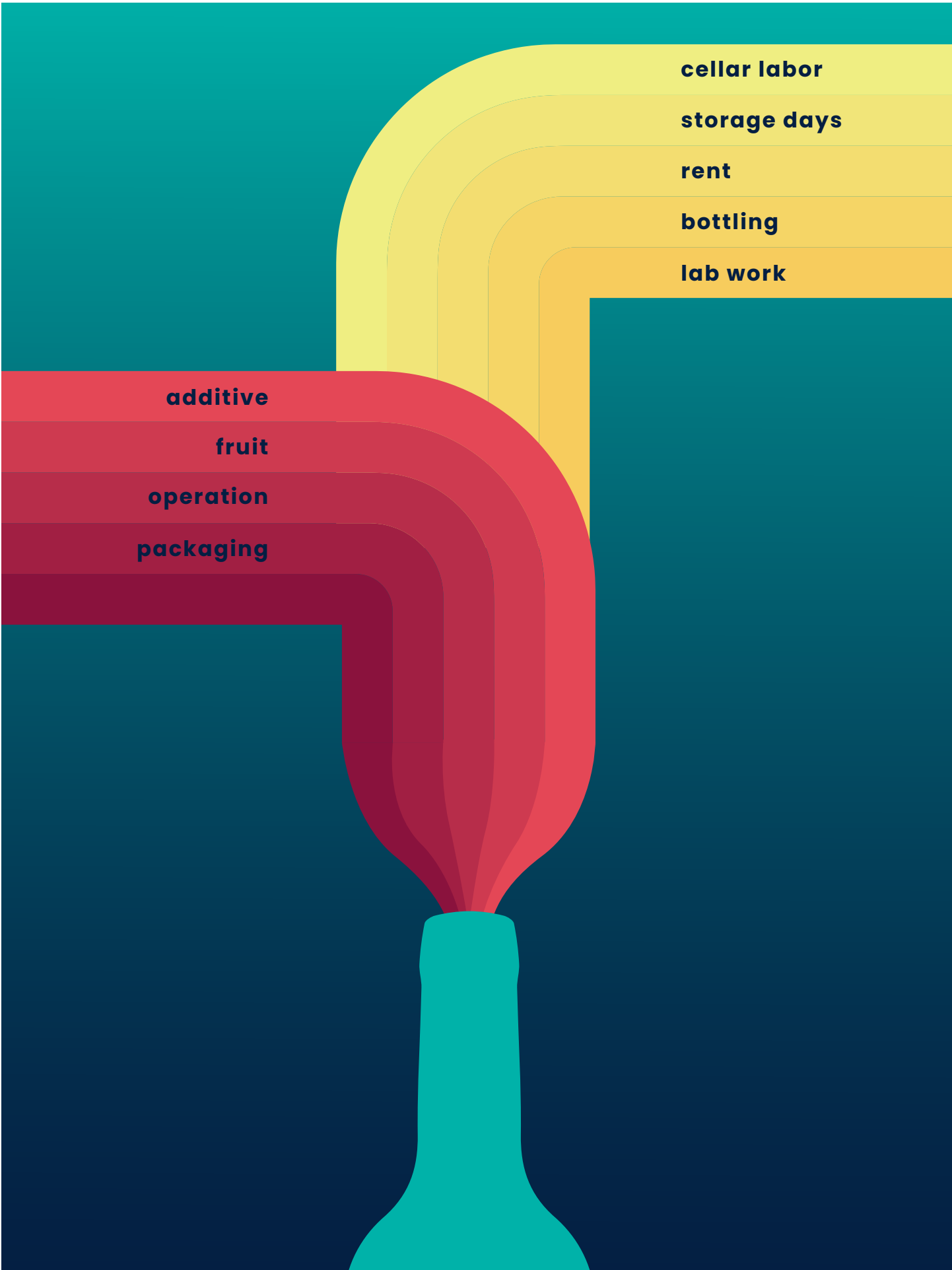
Cost management simplified to the most important categories for your business gives you a chance to drill into cost analysis at the most granular level and finally understand the exact cost of a bottle of wine.

Accurate costing leads to more money made and more opportunities to continue perfecting the winemaking craft. Those with access to vintrace's cost management capabilities communicate effortlessly with finance teams by:

- Entering data across all costing touchpoints without interrupting workflows
- Preventing costing issues from building up
- Reducing double data entry and potential errors that come from it

Everything leads into the final cost of your product(s), by gallon or liter, to give you a holistic view of your spending. When there's visibility into the exact cost of a bottle, a winery can create better opportunities for the entire business to invest more in the winemaking process.





APIs and integrations

Get in sync with your business

vintrace works with partner companies to support tech integrations with additional tools so you can say goodbye to double data entry. vintrace is continuously pursuing and implementing platform integrations to synchronize your data with other applications and help you effectively manage your wine business. It takes commitment from all parties to bring these integrations to life, but it's well worth the work.

APIs (application programming interfaces) push what's possible

Automating tedious processes significantly reduces time spent on monotonous manual tasks. vintrace APIs give you a chance to focus more on your craft while the computer handles the things that clutter your schedule. By leveraging APIs, wineries can automate inventory, gain real-time visibility, personalize customer experiences, optimize sales, and expand their reach.

APIs are available for receiving fruit or bulk wine, winemaking, work orders, lab, stock, sales, and finance.

Integrations are a door to growth

Partner integrations boost your success using vintrace. By seamlessly connecting different software systems, wineries enhance their operational efficiency and unlock a range of benefits. Integrating wine production software with inventory management systems, customer relationships tools, and sales and distribution platforms will ultimately drive growth in the competitive wine industry.

The success of existing APIs and integrations is a direct result of the fantastic partners working alongside vintrace to help make your workflow as smooth and efficient as possible.

Weigh scale integration

vintrace can read weight output that's generated from network-attached scales. This allows operators to record weights in real time from the vintrace web application and vintrace mobile app.



BAKER WINE &
GRAPE ANALYSIS

GrapeWeb



Anton Paar

ThermoFisher
SCIENTIFIC

ChemWell



vinCreative



Custom crush management: Revolutionize client collaboration

In the ever-evolving world of winemaking, technology is an indispensable tool for streamlining processes and ensuring quality. One key innovation is winery software designed to assist in custom crush and contract winemaking.

From tracking inventory and billing to monitoring fermentation and analyzing data, vintrace empowers both you and your clients with real-time information and control over every aspect of production.

Gone are the days of manual record-keeping and cumbersome spreadsheets. vintrace provides a centralized platform where all relevant information can be stored, accessed, and shared securely.

vintrace simplifies the entire custom crush process

- Manage wine contracts, owners, AP's, fee schedules and more
- Track various charge types with simple client billing
- Ensure compliance across all client work
- Manage harvest across all involved parties
- Provide login access for clients to see their wine batches and run reports

"With vintrace, we've reduced our harvest crew by 50%, from 4-5 interns down to just two, while giving ourselves more time to do higher value work in the vineyard and winery."



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

Leveraging vintrace

before during after harvest

From pre-harvest planning to post-harvest analysis, vintrace delivers significant benefits for wineries around the globe. The combined power of winemakers and vintrace support creates control and planning capabilities to make every production stage seamless.



Before harvest

Wine production software assists in streamlining operations to help:

- Record vineyard assessments to assist with picking decisions
- Collect winemaker forecasts to inform additional purchasing needs
- Leverage end-to-end data visibility to write work orders against planned fruit



During harvest

Winery software can be an indispensable tool for:

- Monitoring fermentation progress
- Managing cellar operations
- Ensuring quality control
- With real-time data on temperature, pH levels, and brix, winemakers can make adjustments as needed to achieve fermentation goals and desired wine profiles throughout the production process



After harvest

Winery software continues to provide value by facilitating comprehensive analysis of production data. This includes:

- Powerful cost allocation tools to accurately document and track costs like overhead as it's associated with each batch of wine produced
- Generating reports for compliance purposes or future planning
- Evaluating batches, product quality, blending, or finalizing products to share with the world and match against historical data to evaluate overall tracking composition

By leveraging the capabilities of vintrace throughout the entire winemaking process, you can optimize your operations for efficiency and quality. From grape to bottle, these tools empower wineries to make data-driven decisions that ultimately lead to better wines and improved business outcomes.

Not to mention... You'll need a GREAT harvest playlist so you can whistle while you work. Check out the vintrace Harvest Playlist on Spotify!



The most important variable of a successful year? People.

You and your winery team care.

The work you do is hard. It's why winemaking is called a craft.

The vintrace team is made up of wine and beverage professionals from around the globe who deeply value your craft and are ready to provide meaningful support.

- vintrace wineries take advantage of live support via phone, email, and screen share
- Global distribution of staff between the US and Australia means a vintrace employee is available at all times
- Support is included in your subscription

You need a fast and cost-effective way to implement software. Onboarding, implementation, and training are all done in a way that enables you to quickly get up and running with vintrace without spending too much time or money.

- Low Total Cost of Ownership (TCO)
- 2-5x faster than competing implementation offers at a cost 2-5x less than other leading wine production software
- No additional consultants needed
The vintrace team handles everything
- Live training and a demo site populated with your data

The human variable should be a top consideration when evaluating software. After all, you want people who don't just get the job done, but get the job done right.





vintrace

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Wineries around the world are leveraging vintrace to fearlessly enter the modern beverage industry.

Are you ready to join them?

Connect with a vintrace team member today.

sales@vintrace.com
888-240-4860

