

THE VYOM — WINERY

ERP Process Training Handout

End-to-end operational guide: from grape inward to dispatch

Covers: Masters · Procurement & Purchase Orders · Goods/Grape Inward · Quality Control · Crushing · Fermentation
& Cellar · Bottling · Dispatch · Operations Dashboard

Version 1.0 · Training & Reference

About this handout

This handout walks every team member through the standard operating flow of the Vyom Winery ERP. Each stage of production has a dedicated screen in the system; this guide explains what each stage is for, who performs it, the exact steps to follow, and the key information to capture. Follow the stages in order — each one builds on the data entered in the previous step, so accurate, timely entry keeps stock, quality and dispatch records correct end-to-end.

How to read each section

Every stage shows a numbered green band with the stage name, followed by a strip telling you the **screen** to open and the **role** that normally performs it. Then you get the purpose, the step-by-step actions, a key-fields table, and tip / important call-outs where they matter.

The winery process at a glance



Supporting throughout: **Tank cleaning**, **wastage / scrap recording**, and the **Operations Dashboard** for live monitoring.

Roles & responsibilities

Role	Responsibility
Gate / Store Operator	Records grape & material inward, weighbridge readings, store entries.
Procurement	Raises purchase orders, manages vendors, tracks PO fulfilment.
QC / Lab	Performs grape testing, QC acceptance, lab results and tank testing.
Cellar / Production	Crushing, fermentation logs, racking, fining, filtration, blending, tank management.
Bottling	Bottling transfers from tank to finished goods.
Dispatch / Stores	Delivery challans and outward dispatch.
Supervisor / Admin	Approvals, masters, users & roles, reports and dashboard oversight.

Logging in

1. Open the ERP URL in your browser and sign in on the **Login** screen with your user name and password.
2. Use **Change Password** after your first login to set a private password.
3. Your role controls which menus you can see — if a screen is missing, contact your supervisor (managed under **Role Management / User Role Assignment**).

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Masters Setup (one-time / as needed)

SCREEN

Farmer Master, Farm Master, Manage Supplier, Manage Product, Manage Unit, Tank Master

DONE BY

Admin / Supervisor

Masters are the reference lists the whole system draws from — farmers, farms, suppliers (vendors), products, units of measure and tanks. They are set up once and updated whenever something new is added. Accurate masters mean every later screen shows the correct dropdown choices.

Steps

1. Add grape growers under **Farmer Master** and their plots under **Farm Master**.
2. Add vendors/suppliers under **Manage Supplier**, including GST, PAN and the statutory, banking and document details.
3. Add raw materials, consumables and finished products under **Manage Product** (with category, type, packing and unit).
4. Define measurement units under **Manage Unit** (Kg, Litre, Nos, etc.).
5. Register every cellar vessel under **Tank Master** with its capacity, type and cleaning interval.
6. Set up staff under **Manage Employee** and system logins under **Manage User / Role Management**.

Key fields

Field	What to enter
Supplier statutory	GST, PAN, TAN, MSME, FSSAI, PIN, phone — used on POs and inward.
Supplier banking	Bank name, A/C number, IFSC, branch — for payments and records.
Tank capacity	Maximum litres; drives the dashboard fill % and tank summary.
Cleaning interval	Days between cleans; drives the 'cleaning due' alert.

TIP — Keep masters clean

Avoid duplicate suppliers or products — duplicates split your stock and reporting. Search before adding a new entry.

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Purchase Order

SCREEN

Purchase Order (list: Purchase Order List)

DONE BY

Procurement

A Purchase Order (PO) is a formal request to a vendor to supply goods. Raising it in the ERP lets you track what was ordered versus what is actually received, so nothing is missed and over-receipts are caught.

Steps

1. Open **Purchase Order** and set the **Date** and **Type** (Normal PO, Job Work PO or Open PO).
2. Pick the **Vendor** from the dropdown (use the + button to add a new vendor on the fly).
3. In the line-items area choose a **Product**, enter **Rate**, **Qty** and **Unit**, then click **Add**. Taxes (CGST/SGST/IGST) calculate automatically.
4. Repeat for every product. Review the totals, enter any **Discount**; the **Net Amount** updates.
5. Add **Remarks** and **Terms & Conditions** if needed, then click **Save**.

6. Track progress later from the **Fulfillment** column — each line shows **Pending**, **Partial** or **Received** as goods arrive.

Key fields

Field	What to enter
Type	Normal PO for standard buying; Job Work PO for outside processing; Open PO for call-off.
Rate / Qty / Unit	Price per unit, ordered quantity, and unit of measure for each product line.
Fulfillment	Auto status per line — updates when goods are received against the PO at inward.

TIP — Fulfillment tracking

The Pending / Partial / Received badges are driven by goods inward. A PO becomes **Received** only when every line is fully received; it shows **Partial** while some quantity is still due.

IMPORTANT — Save before leaving

Line items are held in a temporary cart until you press **Save**. Navigating away without saving will lose the entered lines.

2 Grape & Goods Inward (Gate Entry)

SCREEN	Grape Inward / Goods Inward Report (GIR) (lists: Grape Inward List, GIR List)	DONE BY	Gate / Store Operator
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Inward is where material physically enters the winery at the gate. Grapes from farmers are recorded on **Grape Inward**; other goods and raw materials on **Goods Inward Report**. Weighbridge readings and supplier/transport details are captured here, creating the gate record the rest of the flow depends on.

Steps

1. Open **Grape Inward** for fruit, or **Goods Inward Report** for materials.
2. Set the **Date** and choose the **Type**. For materials bought on a PO, choose the **Purchase Order** type; for everything else use **Normal Inward**.
3. If it is a PO inward, reference the **PO No.** so the receipt is linked to the order (this drives partial/complete receipt status).
4. Select the **Supplier** and **Transporter**, and fill document fields — Gate Entry, DC No./Date, Invoice No./Date.
5. Record the weighbridge data — Vehicle No., LR No./Date, Freight, Kanta Receipt, Gross Weight.
6. Add each **Product** with **Qty** and **Unit**, then click **Add**.
7. Click **Inward** to save the gate record.

Key fields

Field	What to enter
Type	Normal Inward = free receipt. Purchase Order = receive against an existing PO.
PO No.	Links the receipt to a PO so ordered vs received is tracked (partial / complete).
Gross / Tare / Net	Weighbridge readings; Net weight is the accepted material quantity.
DC / Invoice	Supplier delivery-challan and invoice references for traceability.

TIP — Normal vs PO inward

Choose **Normal Inward** when there is no purchase order. Choose **Purchase Order** to receive against a PO — you can receive part of a PO now and the rest later; the PO line shows **Partial** until fully received, then **Received**.

IMPORTANT — Match quantities to the PO

When receiving on a PO, the received quantity is checked against the pending quantity. Receive only what physically arrived — the balance stays open for the next delivery.

3 Quality Control & Testing

SCREEN	Grape Inward Testing, QC, QC Report, Lab QC Results	DONE BY	QC / Lab
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Quality control verifies incoming material and in-process wine before it moves forward. Grapes are tested on intake; received goods and tank samples are checked against acceptable ranges and either accepted or flagged.

Steps

1. For fruit, open **Grape Inward Testing** and record the test readings against the inward lot.
2. For goods/tank QC, open **QC**, pick the inward/lot, and enter each QC parameter's reading.
3. The system compares each reading to its acceptable min/max range and marks it pass or fail.
4. Set the overall **QC accept** status; accepted material becomes available for the next stage.
5. Print or review results from **QC Report / Lab QC Results**; the dashboard 'Pending QC' tile lists lots still awaiting clearance.

TIP — Clear QC promptly

Material waits in 'Pending QC' until accepted. Clearing QC quickly keeps the production pipeline moving and keeps the dashboard count low.

4 Crushing

SCREEN	Crushing Inward (pending list: Pending Crushed Inward List)	DONE BY	Cellar / Production
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Crushing converts accepted grapes into juice/must that is sent to tanks. The crushing entry records how much fruit was processed and the output, linking harvested fruit to the tank where fermentation begins.

Steps

1. Open **Crushing Inward** and select the accepted grape lot to be crushed.
2. Enter the quantity crushed and the resulting juice/must output and destination tank.
3. Save the entry — the juice is now associated with the chosen tank for processing.
4. Use **Pending Crushed Inward List** to see fruit accepted but not yet crushed.

TIP — Assign the right tank

Send the must to a clean, empty tank of sufficient capacity — the tank's fill level updates and is visible on the Tank Summary and dashboard.

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Fermentation & Cellar Operations

SCREEN

Process Tank, Fermentation Log, SO2 Addition Log, MLF Tracking, Racking, Fining/Clarification, Filtration Log, Blending Sheet

DONE BY

Cellar / Production

This is the heart of winemaking: juice ferments and matures in tanks while the cellar team logs additions, movements and treatments. Each activity is recorded against the tank so the wine's history is fully traceable.

Steps

1. Manage day-to-day tank work from **Process Tank** and monitor vessels on **Tank Dashboard / Tank List**.
2. Record fermentation readings (e.g. temperature, sugar/Brix) over time in **Fermentation Log**.
3. Log sulphur dioxide additions in **SO2 Addition Log** and malolactic progress in **MLF Tracking**.
4. Move wine between vessels using **Racking** (records from-tank and to-tank, with any wastage).
5. Apply and record clarification in **Fining / Clarification** and **Filtration Log**.
6. Combine lots per recipe in the **Blending Sheet** when creating a blend.
7. Sample and re-test tanks via QC whenever required before the next step.

Key fields

Field	What to enter
Tank activity	Every addition, racking and test is logged against the tank for traceability.
Racking	Captures source and destination tanks and any liquid wastage during transfer.
Wastage	Record losses so stock reconciliation stays accurate (see Wastage / Scrap).

TIP — Keep logs current

Enter fermentation and addition logs the same day. The dashboard's processing trend and tank summary are only as accurate as the latest entries.

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Tank Cleaning (supporting process)

SCREEN

Tank Cleaning / Tank Clean Process

DONE BY

Cellar / Production

Empty tanks must be cleaned before reuse. Recording cleaning keeps the 'cleaning due' alerts accurate and ensures wine is only moved into sanitised vessels.

Steps

1. When a tank is emptied, open **Tank Cleaning** and select the tank.
2. Record the wash type, who performed it and the date.
3. Save — the tank's next-cleaning date resets and it is marked available/clean.
4. Watch the dashboard **Clean Due** count and Tank Summary for vessels overdue for cleaning.

TIP — Clean before refilling

A tank flagged 'Cleaning' on the dashboard should not be refilled until its cleaning record is entered.

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Bottling

SCREEN **Bottling Transfer**DONE BY **Bottling**

Bottling moves finished wine out of a tank into packaged finished goods. The transfer reduces the tank quantity and creates the bottled stock with batch, manufacturing and expiry details.

Steps

1. Open **Bottling Transfer** and select the source **Tank** (or arrive pre-selected from the tank screen).
2. Confirm the wine/batch and enter the bottling date and quantity transferred.
3. Record manufacturing and expiry dates and any packaging details.
4. Save the transfer — tank stock decreases and finished-goods stock increases.
5. The dashboard 'Bottling (Month)' tile reflects bottling volume for the period.

IMPORTANT — Verify the batch

Bottle from the correct tank and batch — this record becomes the traceability link for the finished product all the way to dispatch.

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Dispatch & Delivery

SCREEN **Delivery Challan, Bulk Delivery Challan (list: Delivery Challan List)**DONE BY **Dispatch / Stores**

Dispatch sends finished or bulk product out to customers. A Delivery Challan documents what left the premises, to whom, and on which vehicle, completing the outward side of stock movement.

Steps

1. Open **Delivery Challan** (or **Bulk Delivery Challan** for tanker/bulk movement).
2. Select the customer and add the products and quantities being dispatched.
3. Enter transport and document details and save to generate the challan.
4. Track and reprint past challans from **Delivery Challan List**.

TIP — Stock stays accurate

Always raise the challan in the system at dispatch so finished-goods stock and movement reports stay correct.

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Operations Dashboard (monitoring)

SCREEN **Default (home dashboard)**DONE BY **All roles / Supervisor**

The dashboard is the live home screen. It summarises the day's activity so supervisors and operators can see, at a glance, what is happening across inward, the cellar and quality without opening each module.

Steps

1. The **KPI row** shows Goods Inward today, Store Inward today, Bottling this month, Pending QC and Open Purchase Orders.

2. The **trend chart** plots goods and store inward (and processing volume) over the last 12 months — use the tabs to switch views.
3. The **Tank Summary** shows total tanks, how many are in use, how many are due for cleaning, and overall capacity utilisation.
4. The **Tank Status** table lists each tank's fill level and status; **Recent Activity** shows the latest inward and processing entries.
5. Use the **Quick Actions** shortcuts to jump straight into New Grape Inward, Store Entry, Bottling Transfer or Purchase Order.

TIP — Start your day here

Check Pending QC and Clean Due first thing — they highlight work that is holding up the pipeline.



Quick Reference — Statuses & Modules

Purchase Order fulfilment status

Status	Meaning
Pending	Nothing received against this PO line yet.
Partial	Some quantity received; a balance is still due.
Received	Full ordered quantity has been received.

Tank status

Status	Meaning
Active / In use	Tank currently holds juice or wine.
Empty	Tank is empty and available.
Cleaning	Tank is due for / undergoing cleaning — do not refill until cleaned.

Module quick-find

Area	Screens
Procurement	Purchase Order, Purchase Order List, Manage Supplier
Inward	Grape Inward, Goods Inward Report, Store Entry, GIR List, Grape Inward List
Quality	Grape Inward Testing, QC, QC Report, Lab QC Results
Cellar	Crushing Inward, Process Tank, Fermentation Log, SO2 Addition Log, MLF Tracking, Racking, Fining/Clarification, Filtration Log, Blending Sheet
Tanks	Tank Master, Tank List, Tank Dashboard, Tank Activity, Tank Cleaning
Bottling & Dispatch	Bottling Transfer, Delivery Challan, Bulk Delivery Challan, Delivery Challan List
Reports & Admin	Dashboard, Reports, Winery Reports, Wastage/Scrap, Manage User, Role Management

TIP — Golden rule of data entry

Enter every transaction in the system **as it happens**, in the correct stage screen. Stock levels, quality status, tank fill, PO fulfilment and the dashboard are all calculated from these entries — timely, accurate input keeps the entire winery's records trustworthy.