



## Roll Vintage moving from Current Vintage to New Vintage

Please read these notes through before starting your End of Vintage Update

### Winemaking Vintage Administration Menu

The screenshot shows the 'Ezy-Ezy Wine - Renee' application window. The title bar indicates the user is 'Renee' and the IP address is '192.168.10.20'. The menu bar includes 'File', 'Tools', 'Personalise', 'Windows', 'Help', 'Training Notes', and 'Ask a Question'. The left sidebar contains a tree view of the application's structure, with 'Vintage Administration' selected and highlighted in blue. The main content area displays a list of administrative tasks, organized into two columns:

Task Name	Action
Accounts Payable	End of Vintage Update
Accounts Receivable	Copy Varieties To New Vintage
Asset Register	Copy Payment Terms & Rates
General Ledger	Copy Grower Deliveries
Marketing & CRM	Copy Planned Variety Rates
Payroll & Human Resources	Last Delivery Maintenance
Plant Servicing	W/bridge Analysis Maint (Hist)
Winemaking	GL/Weighbridge Values Update
Weighbridge Reference Maint.	Merge Variety Codes
Weighbridge Reference Reports	Import Grower Details
Weighbridge Operations	Import Vineyard Blocks
Weighbridge Operations Reports	Import Vineyard Sections
Vintage Report Writer	Import Grower Bookings
Cellar Reference Maintenance	Import Crush Corrections
Cellar Reference Reports	Import Weighbridge Docket
Cellar Operations	Import Weighbridge Analysis
Cellar Operations Reports	Import Grower Payment Rates
Cellar Operations History	Import Grower Deliveries
Cellar Report Writer	Export Vintage Detail
Bulk Receiving/Disp. Operations	Export Grower Details
Bulk Receiving/Disp. History	Export Vineyard Blocks
Samples Despatch	Export Vineyard Sections
Sundry Despatch	Export Weighbridge Docket
Grower Payments	Export Grower Del. Forecast
Grower Payments Reports	Activate/Deactivate Growers
Winemaking Planning Maint.	Activate/Deactivate Sections
Winemaking Planning Reports	Activate/Deactivate Rate Types
Winemaking Statutory Reports	Activate/Deactivate Carriers
Multi-Cellar Consolidation	Activate/Deactivate Harvest Op
Contract Winemaking	Change Grower Code
Vintage Administration	Change Block Code
Winemaking Administration	
Bottling	
Purchase Orders	
Sales	
Stock Control	
Vineyard Management	
Favourites	
System Administration	

Roll Vintage Pictorial Instructions.

Running **End of Vintage Update** (or Rolling Vintage) in Ezy will set you up for the new year and keep all the incoming fruit separated from the previous vintage records.

### STEP 1. Copy Varieties to New Vintage

#### Winemaking – Vintage Administration – Copy Varieties to New Vintage

In the first field enter the Vintage you are copying data from e.g. Current Vintage (2024) **Note:** you can choose any previous vintage in this field.

In the second field **Copy To** enter the new Vintage you are rolling into.

The screenshot shows a software window titled "PRA10 - Winemaking - Vintage Administration - Copy Varieties To New Vintage". The window has a "Selection" tab and two dropdown menus: "Vintage" (set to 2024) and "Copy To" (set to 2025). Below these are buttons for "Search", "Clear", and "Copy" (the "Copy" button is highlighted with a red box). A table below shows 13 records found for vintage 2024. A small dialog box in the bottom right corner displays the message "PRA10 - Copy Varieties To New Vintage" and "Vintage 2025 successfully Copied" with an "OK" button.

Vintage	Variety	Name	Group
2024	BEER	Beer	WHT
2024	CAF	Cabernet Franc	RED
2024	CAS	Cab. Sauv.	RED
2024	CHR	Chardonnay	WHT
2024	LEC	Leccino	OLV
2024	MAL	Malbec	RED
2024	MER	Merlot	RED
2024	PIN	Pinot Noir	RED
2024	RIE	Riesling	WHT
2024	SAB	Sauvignon Blanc	WHT
2024	SEM	Semillion	WHT
2024	SHZ	Shiraz	RED
2024	VER	Verdelho	WHT

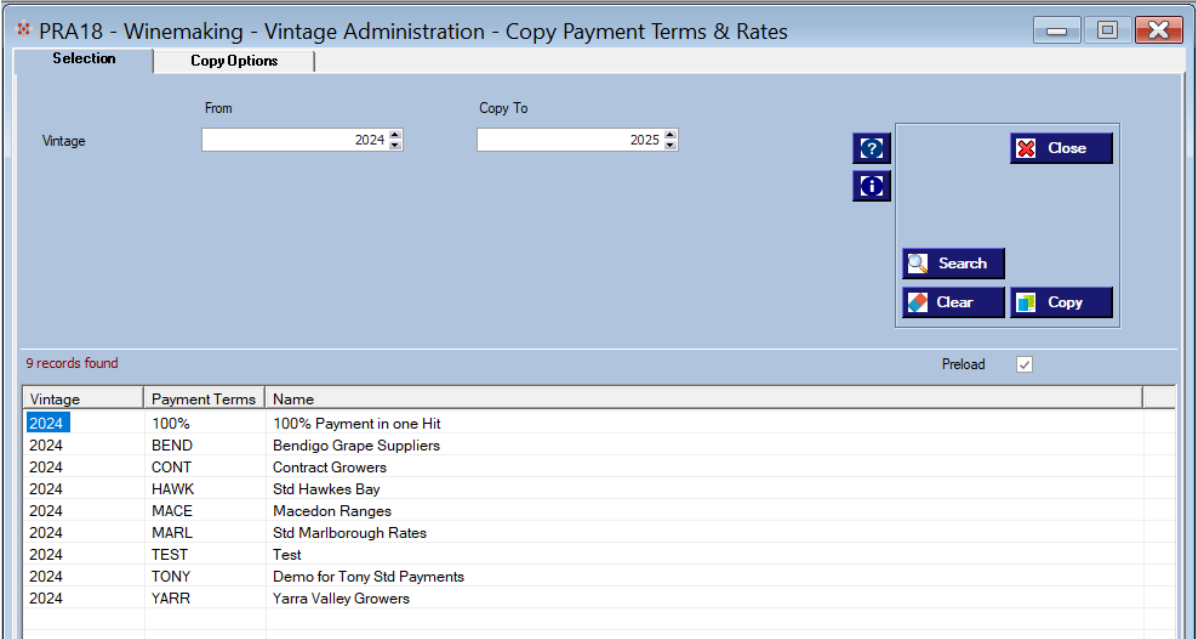
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## STEP 2. Copy Payment Terms & Rates

### Winemaking – Vintage Administration – Copy Payment Terms & Rates

On the Selection screen enter in the first field **From** the Vintage you are copying data from (2024); this can be any Vintage.

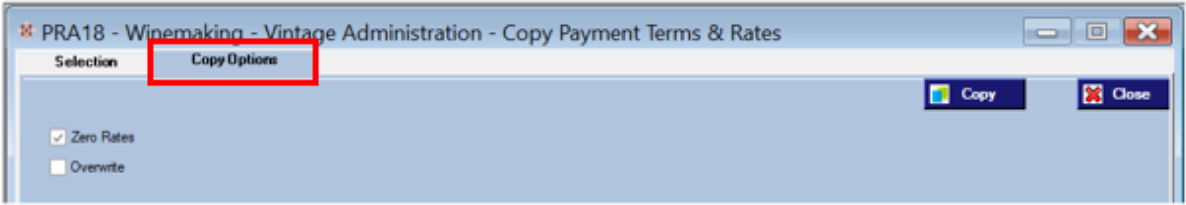
In the second field **Copy To** enter the New Vintage year (2025) you are rolling into.



The screenshot shows a software window titled "PRA18 - Winemaking - Vintage Administration - Copy Payment Terms & Rates". It has two tabs: "Selection" and "Copy Options". The "Selection" tab is active, showing a "Vintage" field with a dropdown menu set to "2024". To the right, there is a "Copy To" field with a dropdown menu set to "2025". Below these fields is a table with 9 records found. The table has three columns: "Vintage", "Payment Terms", and "Name".

Vintage	Payment Terms	Name
2024	100%	100% Payment in one Hit
2024	BEND	Bendigo Grape Suppliers
2024	CONT	Contract Growers
2024	HAWK	Std Hawkes Bay
2024	MACE	Macedon Ranges
2024	MARL	Std Marlborough Rates
2024	TEST	Test
2024	TONY	Demo for Tony Std Payments
2024	YARR	Yarra Valley Growers

Now move to the Copy Options tab.



The screenshot shows the same software window, but now the "Copy Options" tab is active and highlighted with a red box. The "Copy Options" tab contains two checkboxes: "Zero Rates" which is checked, and "Overwrite" which is unchecked. There are also "Copy" and "Close" buttons in the top right corner of the tab.

**Zero Rates** allows the option of resetting ALL the **Grower Payment Rates** for the New Vintage (2025) to zero.

**Overwrite** will copy across the Current Vintage (2024) Payment Rates and allow for modifying them as/where required.

If you decide to 'Zero' the **Grower Payment Rates**, there is an Import option **Import Grower Payment Rates** to reload the new vintage (2025) payment rates.

Both **Grower Payment Terms** and **Grower Payment Rates** are found in **Winemaking - Weighbridge Reference Maintenance** menu.

# Roll Vintage Pictorial Instructions.

The screenshot shows a software interface for copying payment terms and rates. The window title is "PRA18 - Winemaking - Vintage Administration - Copy Payment Terms & Rates". The "Copy Options" tab is active, showing "From" and "Copy To" dropdown menus both set to 2024 and 2025. A table below shows 9 records found. An "OK" dialog box is overlaid on the table, displaying the message "Payment terms and rates have been copied".

Vintage	Payment Terms	Name
2024	100%	100% Payment in one Hit
2024	BEND	Bendigo Grape Suppliers
2024	CONT	Contract Growers
2024	HAWK	Std Hawkes Bay
2024	MACE	Macedon Ranges
2024	MARL	Std Marlborough Rates
2024	TEST	
2024	TONY	
2024	YARR	

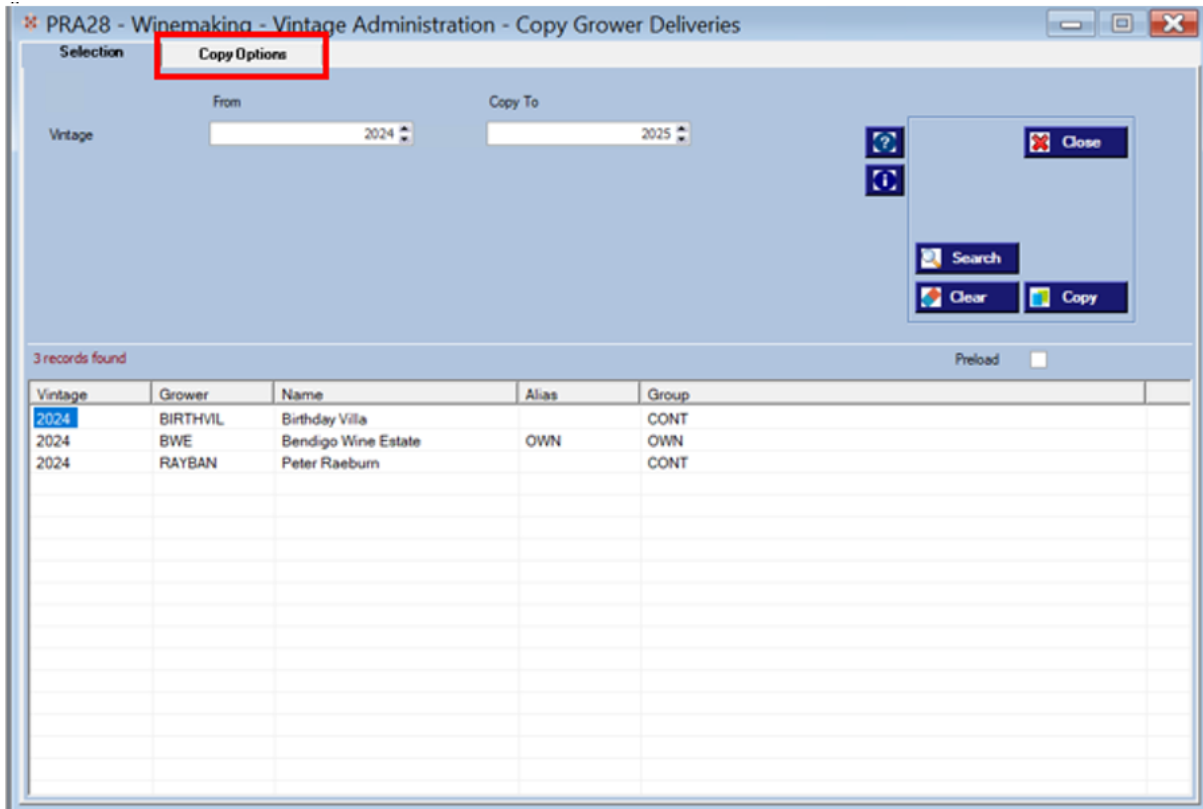
Roll Vintage Pictorial Instructions.

### STEP 3. Copy Grower Deliveries

#### Winemaking – Vintage Administration – Copy Grower Deliveries

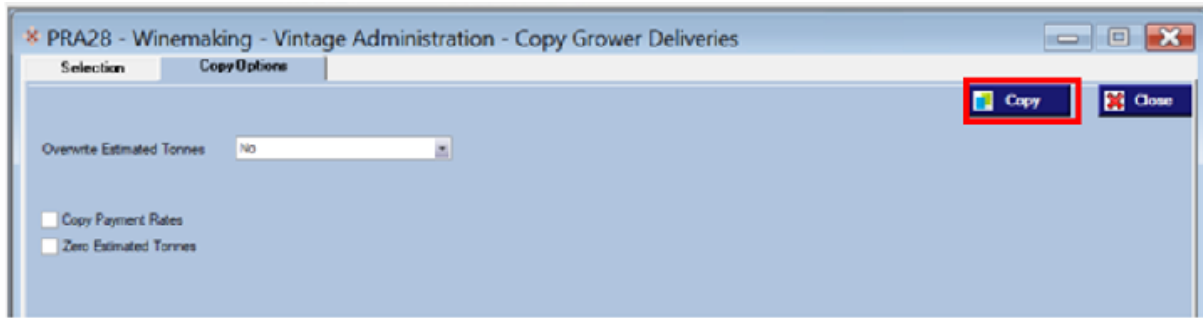
On the **Selection** tab, enter the **From** field the Current vintage (2024).

In the second field **Copy To** enter the new Vintage year (2025) you are rolling into.



Now move to the **Copy Options** tab.

## Roll Vintage Pictorial Instructions.



### Overwrite Estimated Tonnes

This would be rarely used. It allows you to recopy 'Estimated Tonnes' in the event they were inadvertently set to Zero.

### Copy Payment Rates

**Box ticked**, will copy forward from the current Vintage (2024) to the new Vintage (2025).

**Box empty** will set the New Vintages (2025) rates to Zero.

### Zero Estimated Tonnes

This will set the 'Expected Tonnes' (**Grower Deliveries**) for the 2025 Vintage to Zero.

If you do this, you will need to re-enter 'Estimated Tonnes' for ALL **Grower Deliveries**.

There is an **Import Grower Deliveries** menu (**Vintage Administration**) to re-load estimated **Grower Deliveries**.

**Please note**, if the 2025 Vintage already has Estimated Tonnes (**Grower Deliveries**) recorded, then the **Zero Estimated Tonnes** will **NOT** Zero the Estimated Tonnes for 2025.

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## STEP 4. Copy Stock Items

### Stock Control – Stock Administration – Copy Stock Items

New Vintage (2025) **Bulk Wine Stock Item** codes and **Wine** codes need to be created.  
You can automate this process by using the **Copy Stock Items** option in **Stock Administration**.

New Item	Alias	Description	Create
25MAL		2024 Malbec	Yes
25PIN		2024 Pinot Noir	Yes
25RIE		2024 Riesling	Yes
25SHZ		2024 Shiraz	Yes

New Stock Item	25MAL	Create	<input checked="" type="checkbox"/>
Alias			
Description	2024 Malbec		
VINTAGE	2015		2015
CATEGORY	RED		Red Wine
REGION	DOME		Domestic
VARIETY	PIN		Pinot Noir
ALCOHOL	14.0		14%
LABEL	N/A		Not Applicable
QATESTER	NONE		None Yet...Just a QA Tester
DEplete BY	10SHZ		2010 Shiraz
ALLOCATION			
WEB EXPORT	NO		Don't export to Website

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If you only want to copy SOME stock items to the coming vintage, here is how to achieve that:

New Item	Alias	Description	Create
25BAR		2024 Barbera	Yes
25CAS	BULK	2024 Cabernet Sauvignon Bulk	Yes
25CHR	BULK	2024 Chardonnay Bulk	Yes
25MER	BULK	2024 Merlot Bulk	Yes
25SAN	BULK	2024 Sangiovese	Yes
25SEM	BULK	2024 Semillon Bulk	Yes
25SHZ	BULK	2024 Shiraz Bulk	Yes
25SSB	BULK	2024 Semillon Sauvignon Blanc Bulk	Yes

<b>New Stock Item</b>	25BAR
<b>Alias</b>	
<b>Description</b>	2024 Barbera
<b>Vintage</b>	2024
<b>Category</b>	RED
<b>Region</b>	HOME
<b>Variety</b>	BAR
<b>ALC %</b>	12.5

You can “arrow through” the Generated List, and you can “untick” the Create button, if you do not wish to create this stock item for 2025.

Ensure **From: Stock Item** field is loaded as per your bulk wine naming convention, usually; vintage YY and as many question marks as the field allows.

Any blank spaces will mean the copy will not work.

This also applies to the **Copy To: Stock Item** field.

**Stock Group** should be your equivalent for the **Bulk Wine** group.

Ensure the written descriptions are changed on each record they it reflects the Vintage year.

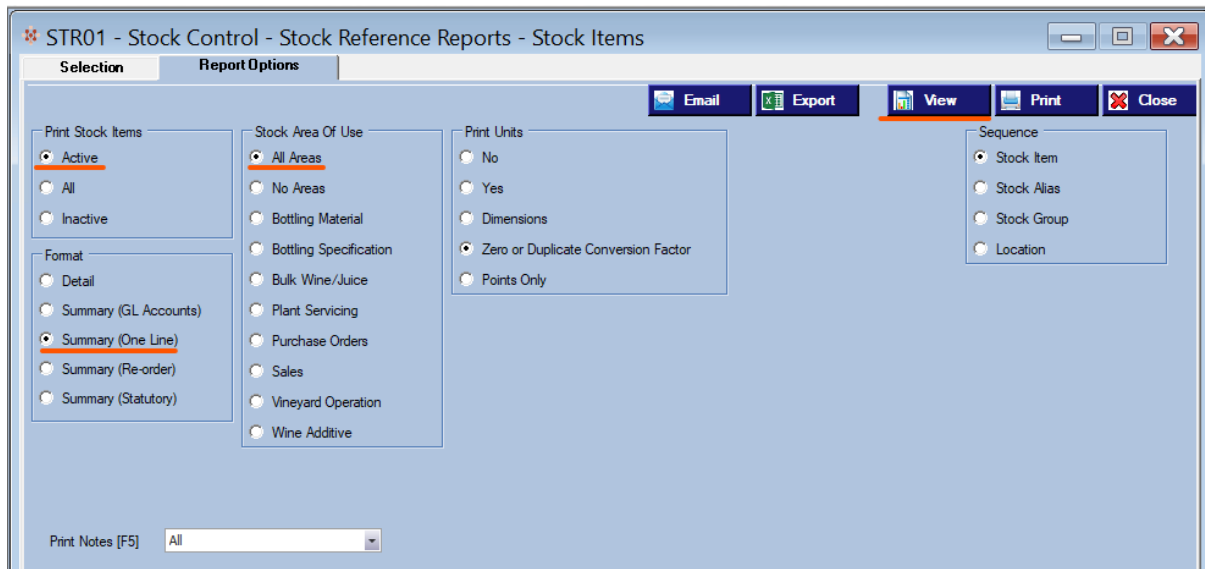
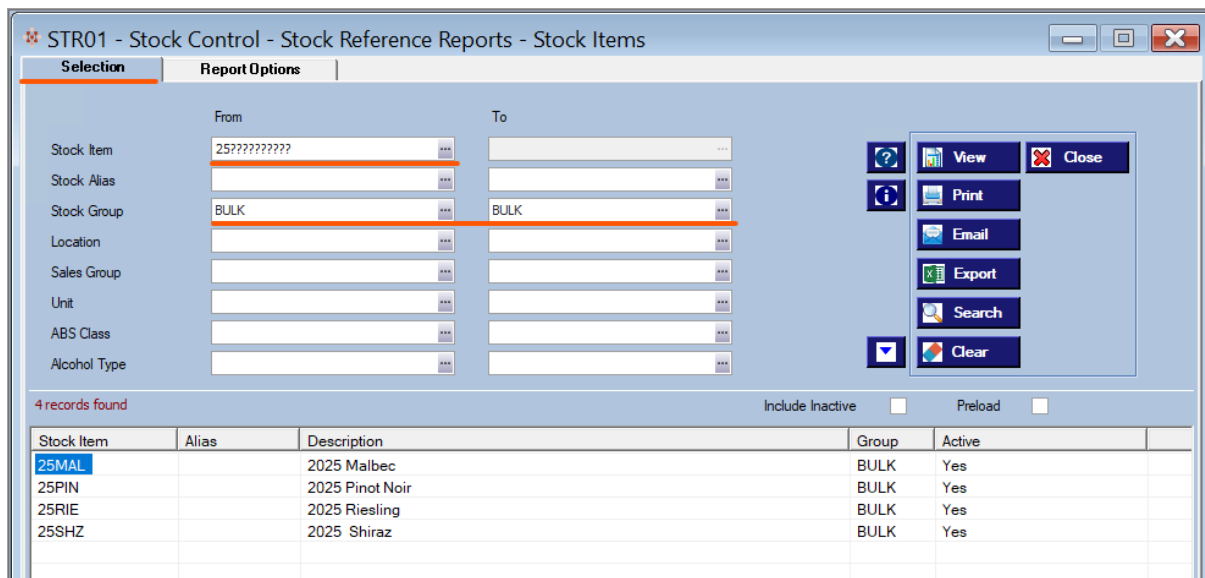
If your ‘dataset’ has ‘Additional Stock Groups’ setup....e.g. Vintage, Category, Region etc as per the screen shot above, then you’ll also need to change these to reflect current details

<b>Stock Item</b>	24SHZ
<b>Description</b>	2024 Shiraz Bulk



Roll Vintage Pictorial Instructions.

The following **Stock Items** report can be run to view the new Vintage codes created, found in **Stock Reference Reports**.



'Maintenance Details' on all new codes can be amended through **Stock Reference Maintenance - Stock items**.

The Actual Stock Item code can be amended through **Stock Administration – Change Stock Item Code**

Roll Vintage Pictorial Instructions.

## STEP 5. Levy Rates

### Winemaking – Weighbridge Reference Maintenance – Levy Rates & Dates

If you're using Ezy to manage your Levy responsibilities, then now is the time to create or revise them.

**\*\*Remember, that once your FIRST Grower Payment is made the Levy program 'locks down' and you cannot insert or modify Levy Rates & Dates.**

### Weighbridge Reference Maintenance - Levy Areas; Levy Types; Levy Rates & Dates

**Levy Rates & Dates** can be created to reflect the Levy payment for each **Levy Area**.

PRM11 - Winemaking - Weighbridge Reference Maint. - Levy Rates & Dates - Edit

Vintage: 2025  
Levy Area: BEND Bendigo

Levy Type: [dropdown]  
Rate Type: [dropdown]  
Rate: [input]  
Payment: [input]  
GL Account: [input]  
Due Date: % [input]

Levy Type	Rate Type	Rate	Payment	GL Account
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Record 0 of 0

Save Close

**Levy Areas** must be created before you can apply **Levy Rates & Dates**.

PRM10 - Winemaking - Weighbridge Reference Maint. - Levy Areas

Vintage: 2025  
Levy Area: From [input] To [input]

2 records found

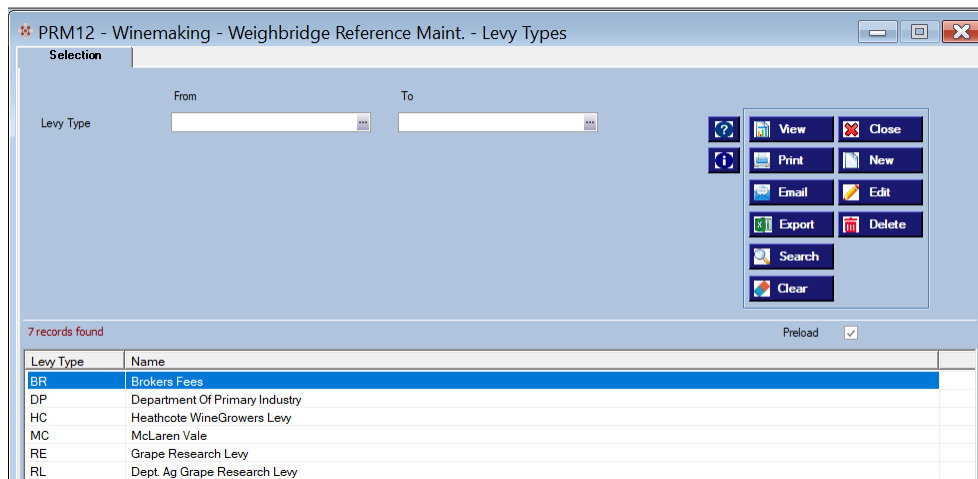
Vintage	Levy Area	Name
2025	BEND	Bendigo
2025	MACE	Macedon

Preload

View Close  
Print New  
Email Edit  
Export Delete  
Search  
Clear

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## Levy Types

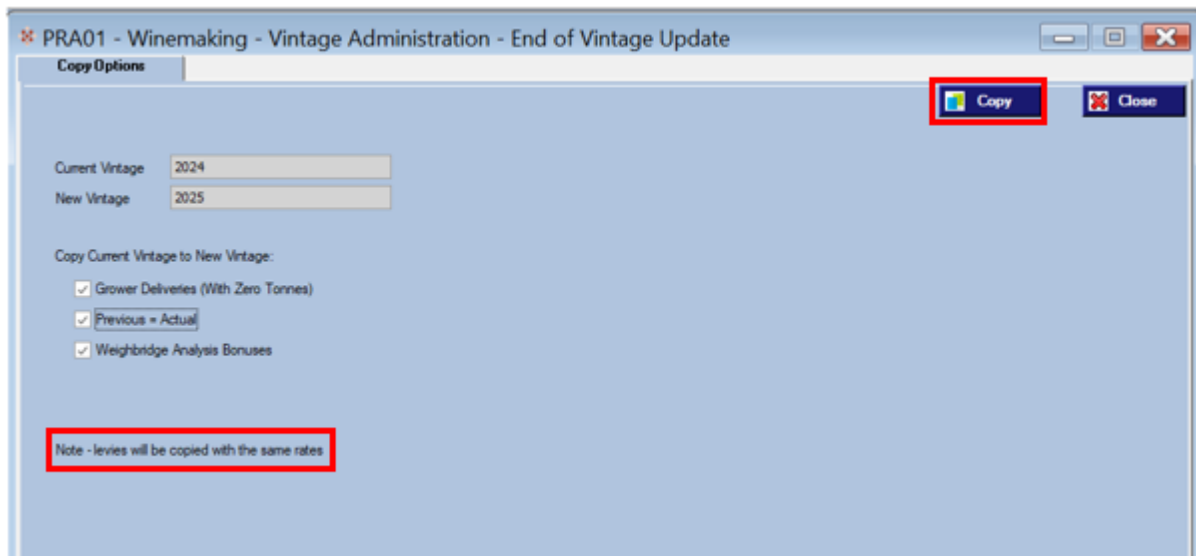


## STEP 6. End of Vintage Update

### Winemaking – Vintage Administration – End of Vintage Update

Current vintage (2024) and New Vintage (2025) will preload in this screen.

- As you have already copied Grower Delivers – **untick** this option.
- As you have already copied Actual tonnes to Estimated tonnes – **untick** this option.
- Leave the last option ticked – Weighbridge Analysis Bonuses.

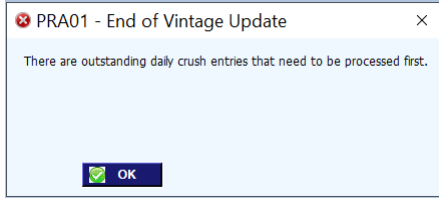


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**End of Vintage Update** has several validation checks built in and these include:

**\*Un-Updated Weighbridge & Crush Dockets**

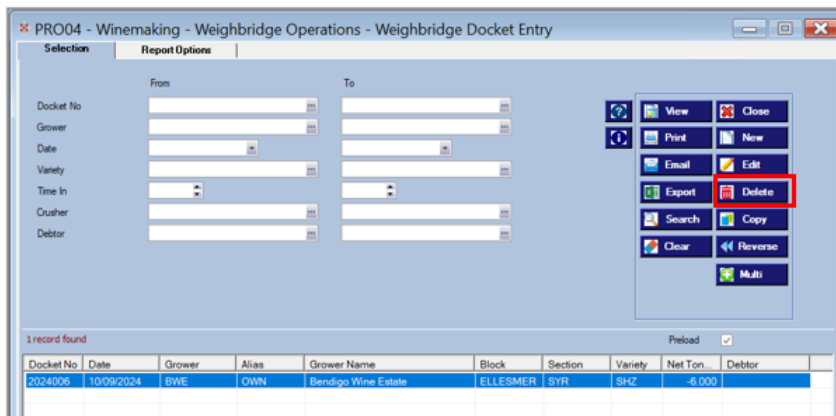
The program will check for any un-updated **Weighbridge Dockets** or **Crush Dockets** for the Current Vintage (2024) and will not 'Roll' if it finds any.



If you have leftover **Crush Dockets**, there is a 'Reverse' option within **Weighbridge Docket Entry** whereby the program will produce a **Weighbridge Docket** with 'negative tonnes' which will 'zero out' the tonnes on the **Crush Docket** and allow that **Crush Docket** to be deleted.

*Refer Reverse Weighbridge document instructions on the release notes page.*

Un Updated Weighbridge Dockets can simply be deleted.



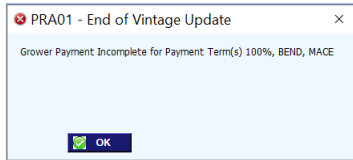
Roll Vintage Pictorial Instructions.

### \*Outstanding Grower Payments

**End of Vintage Update** will check for outstanding **Grower Payments** and will not 'Roll' if it finds any.

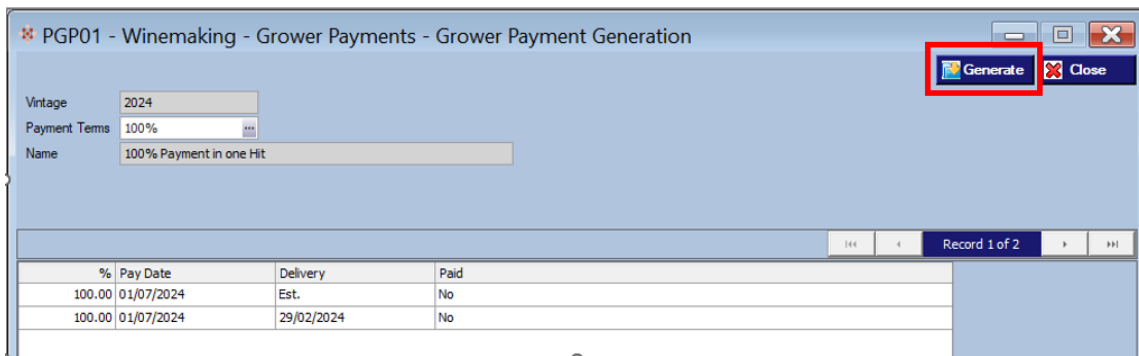
There are three reasons for having outstanding **Grower Payment**:

1. You still have genuine outstanding payments to be made.



2. If you made any **Grower Payments** using the **Grower Manual Payment** option, then the **End of Vintage Update** does not recognise that the payments were made.

To overcome this, run the **Grower Payment Generation** program for the particular Payment Term. This will generate a ZERO payment which you'll need to update.



The **End of Vintage Update** will then regard the payments as being made and will allow the 'Roll' to proceed.

3. You could have old, obsolete or unused Payment Terms that are still set to: 'Pay Growers'... YES.

If the **End of Vintage Update** encounters these, it will not roll.

To address this, simply flag the 'Pay Growers' field in Weighbridge Reference Maintenance - Payment Terms to NO.

## Roll Vintage Pictorial Instructions.

PRM07 - Winemaking - Weighbridge Reference Maint. - Payment Terms - Edit

Vintage: 2024  
Payment Term: 100%  
Name: 100% Payment in one Hit

Pay Growers:  Yes - Schedule  Yes - Pool  No

Link Vineyard Costs:

Pre-Payments: Tonnes Estimate: Current  
% of Estimate: 0.00, Pay Date: P1, Paid:   
% of Estimate: 0.00, Pay Date: P2, Paid:   
% of Estimate: 0.00, Pay Date: P3, Paid:

First Payments: % of Actual: 0.00, Pay Date: 1A, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 1B, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 1C, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 1D, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 1E, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 1F, Delivery Date: , Paid:

Remaining Payments: % of Actual: 0.00, Pay Date: 2, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 3, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 4, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 5, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 6, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 7, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 8, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 9, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 10, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 11, Delivery Date: , Paid:   
% of Actual: 0.00, Pay Date: 12, Delivery Date: , Paid:

Extra: Paid:

Save Close

### STEP 7. Inactivate old Stock Items and Codes

You may also wish to inactivate old/obsolete Bulk Wine Stock Items, Wine Codes, Wine Batches and Barrels.

A routine is included in the 'End of Vintage' program to auto deactivate old/obsolete Bulk Wine **Stock Items, Wine Codes & Wine Batches.**

It searches for records with a 2-digit prefix less than the current Vintage YY. Current & New Vintage **Stock Items, Wine Codes** and **Wine Batch Codes** will not be impacted.

The routine checks:

#### Stock Item:

- Bulk Wine **Area of Use**
- un-updated **Purchase Orders**
- un-updated **Sales Orders**

*Any Wines/Batches with a **current volume** will NOT be inactivated*

It can only inactivate **Stock Items/Wines/Wine Batches** from after 2000. Any Items older than this will need to be manually inactivated.

It will skip any **Stock Item/Wine** codes that start with a 'B' or have only 1 digit representing the Year. These will also need to be manually inactivated using the procedures outlined below.

#### Stock Items

Can be made inactive by using **Stock Administration - Global Stock Item Maintenance.**

Select the Bulk Wine **Stock Group** and set all **Areas of Use** to NO. The program will NOT deactivate items with a current stock on hand balance.

#### Wine Batches

Can be made inactive by using **Winemaking Administration - Activate/Deactivate Wine Batch.**

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### **Wine Codes**

Can be deactivated by using **Cellar Reference Maintenance – Wines**.

### **Barrels**

Vessels in general can be deactivated by using **Winemaking Administration - Activate/Deactivate Vessels**.

Note: If you're using the **Cost Rate** field in **Vessel Types** to add depreciation costs for Barrels, then you should also review the **Cost Rates** set to ensure they're the appropriate value for the now one-year older barrels.

### **Growers / Sections / Grower Rate Types / Carriers / Harvest Operators**

You can Deactivate **Growers, Sections, Grower Rate Types, Carriers** and **Harvest Operators** if they're not needed for the new vintage.

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### STEP 8. Additional set up for new Vintage

If you have New **Growers** for the coming vintage, you will need to create a new **Grower** record, create their **Blocks** and **Sections**, **Payment Rate type** and record an expected **Grower Delivery**.

You can reset your **Weighbridge** and/or **Crush Docket** numbers to 20250001.

There is no requirement to do this.

This is actioned via the **System Parameters - Administration Group** (requires a password).

Parameter	Current Setting	Sequence	Modified	User Id	Last Setting	Reason
next dock	0	=	=	0	0	= 0
Bulk: Despatch, Next Docket Number		120	6822			
Bulk: Receive, Next Docket Number		180	6821			
C/Door: Entry, Next Docket No		1269	7988			
Daily Crush: Next Docket Number	20250001	6043	10/09/2024 14:51:58	RENEE	20212000	
M/Order: Next Docket Number	523	7613				
W/Bridge: Next Docket Number	20250001	6042	10/09/2024 14:53:42	RENEE	20211000	

The **Cellar Work Sheet** number can also be reset via the same process.

Parameter	Current Setting	Sequence	Modified	User Id	Last Setting	Reason
work	0	=	=	0	0	= 0
Cellar: Auto Cellar Work Sheet Number	Yes	6450	26/03/2009 00:00:00	JOHN	No	
Cellar: Next Work Sheet Number	20250001	6150	18/12/2015 00:00:00	JOHN	650001	
Plant: Next Worksheet Number	15	6920				