

Winery OS

What it does, and how to use it — the answers to the first questions, so your first week is spent making wine, not hunting for buttons.

- One record from vine to bottle: blocks, samples, harvest, every lot, tank and addition, and the wine in bond.
- Calculators that show their arithmetic — for SO₂, acid, sugar, YAN, rehydration, tannins and more — that log the dose to the lot in one tap.
- A copilot you can talk to that reads your live records, logs what you tell it, and asks before it moves wine.

Getting in and getting set up

You'll sign in at app.wineryos.io with your email and password (wineryos.io takes you there too). On a phone, add it to your home screen — it behaves like an app.

Signing in

- **Owners** set up the winery from the invitation link we emailed: winery name, town, time zone, your name and a password, and four boxes to tick — the Beta Terms, the compliance acknowledgement, the Acceptable Use Policy and the Privacy Statement. The link works once and lasts seven days.
- **Your crew** don't use that link. You add them yourself (People → + Add someone, section 09), and they get an email with a link to set their own password.
- **Change your password** any time under Settings → Your account → **Change password**.
- **Forgot it?** **Forgot password?** on the sign-in page emails you a reset link that lasts 45 minutes. Winery OS never emails anyone a password.

Set up in this order

The dashboard shows **Finish setting up** until the basics exist, and **Getting started →** walks through them. The order matters — each step needs the one before:

- 1 **Location for weather.** Settings → *Location and weather*: enter a ZIP code and **Look up ZIP**, or **Set the exact spot on a map** if the vineyard sits in a frost pocket away from town.
- 2 **Your vineyard.** Vineyard → **+ New vineyard**. **Pick on map** sets its location by tapping the satellite map.
- 3 **Varietals.** 330 are already in the catalogue. Only add one (**+ New varietal**) if yours is missing.
- 4 **Blocks.** Vineyard → **+ New block** — acreage, rows, spacing, and your Brix/pH/TA targets. Then **Map** to trace each block's outline; the traced area becomes its acreage.
- 5 **Tanks and barrels.** Cellar → **Tank farm** → **+ New vessel**. Add a tank's inside diameter and straight-side height and you can read its volume from a stick.
- 6 **Your crew.** People → **+ Add someone**.
- 7 **Your first wine.** Either record a harvest from a block (**Record harvest**), or for wine already in tank: Cellar → **+ New lot**, then **Record wine on hand** on the lot.

Finding your way

- **Desktop:** the sidebar — Dashboard, Vineyard, Cellar, Inventory, Tasks — and below it Copilot, Calculators, Supplies, Spray program, People, Settings.
- **Phone:** the bar along the bottom, plus **Tools**, which holds everything the sidebar would.

- **Everywhere:** the microphone button talks to the copilot; the calculator button opens a pocket calculator.
- **Units and theme** (gallons or litres, °F or °C, light or dark) can be changed for your own device from the sidebar or Tools without changing anyone else's.

The dashboard — “Today”

The first screen answers one question: what needs attention today? It is computed from your records, not remembered.

- **Needs attention** — alerts grouped *Do now*, *Today*, *Next 48 h*, *This week* and *Monitor*. Each one has **Why?** (the reasoning), **Snooze** (24 hours), **Dismiss**, and **→ Assign task** to hand it to someone. Some let you log straight from the alert: **Log sample** or **Log reading**.
- **Crew board** — a shared note for the cellar and vineyard. Type *@name* to make a post private to those people; they get it by email too.
- **Weather** — today's conditions, wind (coloured by whether it's fit to spray), rain, growing degree days, and a 5-day outlook.
- **Next spray**, today's tasks, block and fermentation cards, bulk and bottled totals, and your tank farm at a glance.

Ledger reconciliation on the dashboard should read *balanced*. If it ever shows drift, the bulk volumes and the ledger disagree — tell us.

Vineyard

Blocks and the map

Each block card shows its stage and ripeness against your targets. On the block's own page you'll find its maturity chart with a projected pick date, photos, growth stages and notes.

Maturity samples

Log a sample on the block — date, Brix, pH, TA. The chart projects when you'll reach target.

Growth stages

Record a stage — bud break through leaf fall, with the percent of the block if you like. Sprays and alerts read these.

Vine Mgmt

A row-by-row picture of the block. Tap a vine, choose what's wrong (dead, missing, disease,

broken post...), and **Flag it** — optionally making a task at the same time. Mark it **Fixed** later.

Harvest

Record harvest on the block: pick date, fruit weight, crush-pad Brix/pH/TA, and whether the fruit goes into an existing lot or a new one. If juice went straight to a tank, record that too. It shows press yield and potential alcohol as you type, and marks the block harvested. The **Harvest report** totals the season by block.

Weather detail

Daily history with rain and temperature, filterable to wet days.

Sprays — Spray program

- **Season program:** build it slot by slot with **+ Add slot manually** — stage, interval, products (*Name @ rate; Name @ rate*) and targets.
- **Log a spray:** **+ Log spray** — blocks, date, water volume, and what went in the tank. **Tank math** works out quantities, and **Mix sheet (PDF)** prints it for the sprayer. It warns about FRAC rotation, pre-harvest intervals and tank mixes.
- **Your products:** **Add from label** reads a label photo for you (check the figures before **Use these figures**), or **+ Add by hand**.
- **Wind** tells you now and for the next 12 hours whether it's too still, good, marginal or too windy.

The label is the law. Winery OS helps with the arithmetic and the reminders; the product label decides what's legal.

Cellar

Everything happens to a **lot** — a wine you're tracking — which lives in one or more vessels.

Lots and tanks

- **+ New lot** — lot code, vintage, wine name, varietal, style, and whether the fruit was estate or bought in. A lot made by *Record harvest* already exists.
- **Tank farm** — your vessels and what's in them.
- **⇄ Rack / transfer** — a four-step wizard: what's moving, where it's going, how much (with *All*, *Half* and *Fill* shortcuts), and any loss to lees. Then **Move it**.

On a lot's page

TO...	USE
Log fermentation	Log reading — Brix or specific gravity, temperature, cap management. The lot's chart and guidance update from it.
Add anything	Record addition — SO ₂ / K-meta, yeast, nutrient, yeast derivative, acid, MLF culture, tannin, enzyme, fining, stabilizer, chaptalization, back-sweetening. Each type links to its calculator.
Log chemistry	Log chemistry — pH, TA, free and total SO ₂ .
Rack or press	Transfer / rack — racking, press, transfer or filtration, with the loss.
Measure a tank	Gauge tank — stick reading or measured volume; Book the difference records where it went (evaporation, topping, lees...).
Blend	Blend into another lot .
Malolactic	Start MLF , then Finished today when it's done.
Bottle	Bottle — volume drawn, bottle size, bottles filled, and the SKU they go into.
Notes and photos	Add a note , Camera .

Nothing in the cellar record is deleted. A wrong transfer or addition isn't erased: use **Void** on it and give a reason. It's struck through and its volume reversed; then you enter it correctly. Both stay visible. That's deliberate: it's what a bonded winery's record has to be.

Calculators, additives and supplies

Calculators

SO₂ / K-meta, TA, acid adjustment, sugar, Brix ↔ SG, YAN, pitch & rehydrate, tannin, product dose, MLF, potential alcohol, general additions, blend, yield, and tank volume from a stick reading. Each one shows its inputs, its formula and its assumptions.

- **Pick a lot** and the calculator fills in its volume, then offers **Log ... → lot** — the dose is recorded on the lot in one tap.
- **K-meta**: potency defaults to pure potassium metabisulfite; choose *Supplier's stated %* if your bag or certificate says otherwise.
- **Pitch & rehydrate**: Go-Ferm Protect Evolution, Go-Ferm Sterol Flash, Go-Ferm, or water only — each with its own water, temperature and step-by-step protocol.
- **Sugar**: say whether it's chaptalization or back-sweetening — they're recorded differently.

Additives library

The Scott Labs catalogue — yeast strains, tannins with dose ranges, ML cultures with their tolerance limits, nutrients and yeast derivatives — each with its source.

Supplies

- **+ New supply item** for each additive and packaging item you keep — K-meta, yeast, Go-Ferm, nutrients, corks, capsules, bottles.
- **Receive** each delivery (with the invoice total, and the cost is averaged in), **Count** the shelf now and then, **Write off** what's spoiled.
- **Additions logged to a lot draw stock down automatically** when the product name matches — pick names from the suggestions when you set items up. Low stock is flagged at the top.

Bottled wine and moving it out

Winery OS tracks bottled wine **in bond**. When wine leaves — to the tasting room or for personal use — it leaves the books, and the record says where it went and how it was taxed.

- **Inventory** shows all wine on hand: bulk by lot, bottled by SKU, and gallonage. [+ New SKU](#) sets one up.
- **Move wine out** (*Inventory*, or the only screen a wine mover sees): choose [Tasting room](#) or [Personal](#), set cases and bottles per wine, and move. Personal use is tax-free and owner-only by default.
- **Made a mistake?** The [Log](#) shows every move; [Fix](#) corrects the count or undoes the whole move.
- [Hold back](#) keeps a wine out of the move screen (a library wine, a hold for QA).
- **Physical count** — count the shelf; the book is set to what you counted and the difference is kept. [Correct](#) on a single SKU records breakage, samples or recounts.
- **Monthly report** — opening and closing balances, bulk and bottled, with everything that moved between. [↓ Download CSV](#).

Tasks

- **+ Add a task** — what, the category, the lot it's about, who it's for (any number of people), when it's due, and how urgent.
- People assigned a task with a due date get an email with a calendar invite.
- Tick it off when it's done. Each task has its own chat for questions and photos.
- Any alert on the dashboard can become a task with **→ Assign task**.

The copilot

Tap the microphone anywhere and talk — or type. It reads your live records and works with the same tools and permissions you have.

- **Ask:** “What needs my attention?” · “How are the ferments doing?” · “Which yeast suits the Chambourcin?”
- **Tell it:** “The chardonnay is at 4.2 Brix and 62 degrees” — it logs the reading. Readings, samples and tasks are recorded straight away, and it tells you what it recorded.
- **Calculate:** it runs the same calculators as the Calculators page — the numbers never come from the AI itself.
- **It asks first** before it moves wine or records an addition: a card appears, *Needs your confirmation*. **Confirm** does it; **Dismiss** changes nothing.
- Past conversations are kept under **Past conversations**. Its voice is chosen in Settings.

Check what it records. The copilot can mishear or misread. What it logs appears on the lot like anything else — correct it there if it's wrong.

People and settings

Adding your crew

People → **+ Add someone** : name, email and role. They're emailed a link to set their own password. If someone won't see email — a tablet in the tasting room, say — type a starting password instead and give it to them in person; it's never emailed. Each person gets their own sign-in, so the record shows who did what.

ROLE	WHAT IT'S FOR
Owner	Everything, including people, permanent deletion, and removals to personal use.
Administrator	Runs the winery and its people; physical counts and personal-use removals stay with owners.
Winemaker	Creates and edits everything operational; retires records rather than deleting them.
Cellar hand	Fermentation readings, chemistry, additions, transfers and tasks.
Vineyard crew	Samples, growth stages, sprays and tasks.
Wine mover	Moves bottled wine to the tasting room on a tablet — and nothing else.
Viewer	Read only.

Permissions on a person adds or removes individual abilities on top of their role — letting one cellar hand receive supply deliveries, say.

Settings worth knowing

- **Morning digest** — a daily email summary for owners and administrators. Each person turns their own on; an admin sets the hour it goes out.
- **Winery logo** — appears across the app and on emails.
- **Units** — the winery's defaults for everyone; each person can override on their own device.
- **Your data** — **Download my winery record** gives owners and admins the winery's complete record as a file, any time. You are never locked in.

Good to know

- **This is a beta.** Things will change, and some things will break. When they do, we want to hear about it.
- **Check figures before you file.** Winery OS is a record-keeping aid, not a compliance service. Anything that goes on a TTB or state report is yours to check first.
- **Corrections, not deletions.** Wine records are corrected with a reversing entry so the mistake and the fix both stay visible. Readings, samples, notes and tasks can be edited directly.
- **Your records are yours** — other wineries can't see them, and you can download them any time. The Privacy Statement and Beta Terms are linked at the bottom of every page.

Tell us what you think

Reply to any email from us, or write to support@wineryos.io. We're especially looking for:

- **Bugs** — something broke, showed an error, or gave a number that looked wrong. Tell us the page, what you did, and what you expected; a screenshot is perfect.
- **Fixes** — things that work but get in your way: too many taps, confusing wording, a step that doesn't match how your cellar runs.
- **Wants and needs** — what you still keep on paper or in a spreadsheet, and what you'd want next.

Thank you for helping us build it.