



Barkeep 8.2 – Batch Items Feature

Batch Items with Barkeep

How it works

Many bars serve custom, pre-made batch cocktails that are created in-house using multiple ingredients (Items). With Barkeep you can set up Batch Items where you enter the details of your in-house batch cocktails including the container size/type, and ingredients.

You can add Batch Items to inventories the same way that you add any other Item (as full or partial containers, or by weight). Barkeep will automatically add the ingredients (Items) to the inventory based on the Batch Item's Recipe. After adding Batch Items to an inventory, Barkeep will be able to report the Usage and Variance of the underlying ingredients with enhanced accuracy.

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Note: This User Guide contains specific information for using the Batch Items feature. For detailed instructions and further information about Barkeep, please refer to the [BarkeepApp User Guide](#) as well as the [BarkeepOnline User Guide](#).

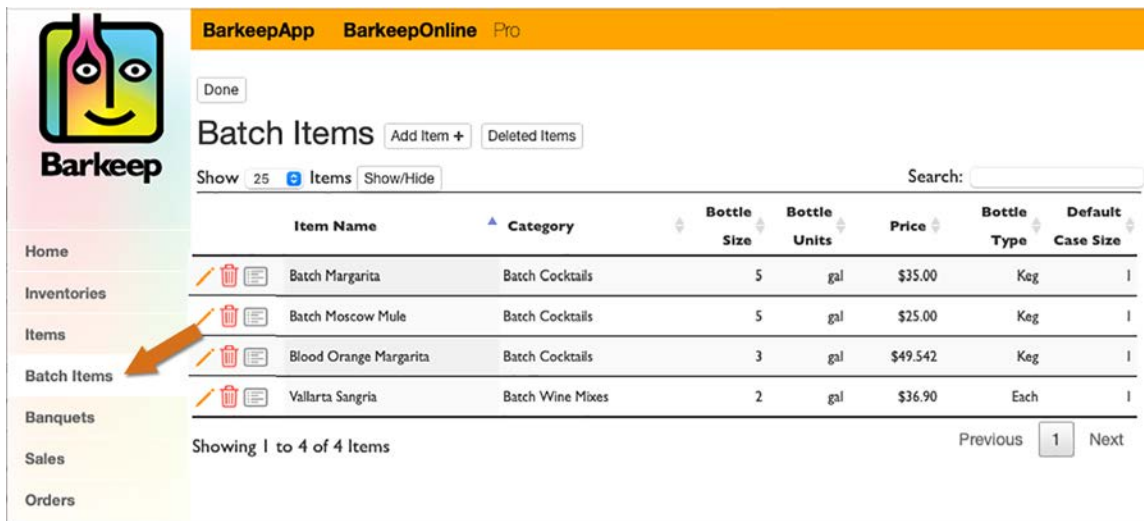
Batch Items in BarkeepOnline

BarkeepOnline¹ subscribers have access to all their Batch Items. BarkeepOnline users can:

- Create new Batch Items.
- Review all Batch Items, make changes, add, modify or remove Batch Item Details and deactivate Batch Items as needed.
- Add Batch Items to inventories.
- Run Usage and Variance Reports to determine the usage, pour cost and variance of the ingredients (Items) used in Batch Item Recipes.

To access your Batch Items in BarkeepOnline:

1. Log in to BarkeepOnline and choose **Batch Items**.
2. You will see a screen displaying all your Batch Items.



¹ BarkeepPro includes the same Batch Items feature as regular Barkeep. All the instructions in this user guide can be used for creating and managing Batch Items with BarkeepPro.

Creating New Batch Items with BarkeepOnline

To create a new Batch Item with BarkeepOnline²:

1. Log in to BarkeepOnline and **a** choose **Batch Items**.
2. Select the **Add Item** button **b** at the top of the Items List.
3. The steps for creating a Batch Item are like the steps for manually creating Items in Barkeep.
4. Give your Batch Item a unique name. **c**
5. Select a Category **d** for your Batch Item. See [Categories for Batch Items](#) for details.
6. Enter a Bottle Size and enter Bottle Units. **e** (e.g., 5 gal, 8 liters, 64 oz., etc.)
Note: The volume/size of your container, e.g., 5 gallons., may not equal the total quantity of the Items in your Recipe. Your Recipe will only contain Items from your list of Items that you use for Barkeep Inventories.
Any other ingredients you use to make your Batch Item, e.g., mixers, should not be included in the Recipe — unless you have the mixers in your Items List and count them in inventories.
7. Select a Bottle Type. The default type is **Keg**, but you can choose any of the types or simply choose **Each** if you do not see a container on the list that is the one you use.
8. The Price (Cost) **f** will be calculated automatically based on your Recipe.
9. If you plan to weigh your Batch Items in inventories you will need to add **g** full and empty weights for your container, see [Weighing Batch Items](#) for details.

The screenshot shows the BarkeepOnline web interface. On the left is a navigation sidebar with 'Batch Items' selected and marked with a red circle 'a'. The main content area shows a 'Batch Items' list with an 'Add Item +' button marked with a red circle 'b'. Below this, a 'Batch Item' form is open, containing several input fields: 'Item Name' (marked 'c'), 'Category' (marked 'd'), 'Bottle Size' (marked 'e'), 'Bottle Units' (marked 'e'), 'Bottle Type' (marked 'e'), 'Price (Cost)' (marked 'f'), 'Default Case Size' (marked 'f'), 'Empty Bottle Weight' (marked 'g'), and 'Full Bottle Weight' (marked 'g'). There is also an 'Inactive?' checkbox. Below the form is a 'Batch Item Recipe' section with 'Add Ingredient' and 'Audit Info' buttons, and a table with columns 'Item Name', 'Quantity', 'Quantity Type', and 'Cost'. The table currently contains no data.

continue to next page for adding a Recipe to your Batch Item

² You may prefer to create Batch cocktails using BarkeepApp instead of BarkeepOnline. The details and information you add are the same using an **iOS Device** in BarkeepApp. See the [Creating Batch Items with BarkeepApp](#) section for more details.

Creating New Batch Items (cont.)

Batch Item Recipes

Every Batch Item needs a Recipe³. The steps for adding a Recipe to a Batch Item are like the ones to add a Recipe to a Sales Item.

1. Select the **Add Ingredient** button. **h**
2. Add each ingredient from the pop-up list of Items. **i**
3. Add the quantity you need to make a full batch for your container. **i** This may include a quantity of bottles, or ounces, liters, etc.
4. You can follow the same steps to add additional ingredients.
5. Periodically you may wish to press the **Save** button to save your changes.
6. When you are finished adding ingredients, **k** press the **Done** button at the top of the Items screen.

Batch Item

Item Name: Blood Orange Margarita copy Price (Cost): \$49.542
Category: Batch Cocktails Default Case Size: 1
Bottle Size: 3 Empty Bottle Weight: 0 lb 0 oz
Bottle Units: gal Full Bottle Weight: 0 lb 0 oz
Bottle Type: Keg Inactive?:

Notes:

Batch Item Recipe

Add Ingredient Search:

Item Name	Quantity	Quantity Type	Cost
Absolut 1L			
Absolut Citron Vodka 1L		bottle	\$7.50
Absolut Mandarin Vodka 1L		bottle	\$25.00
Absolut Vanilla Vodka 1L			
Agave Nectar 750ml			

Batch Item Recipe

Add Ingredient Audit Info Search:

Item Name	Quantity	Quantity Type	Cost
Rose's Sweetened Lime Juice	1.5	L	\$14.3719
Agave Nectar	8	Oz	\$2.6691
Barton Triple Sec	1.5	L	\$7.501
Juarez Tequila	5	Bottle	\$25.00

Note: if you create labels with your own barcodes for your Items, you can also do this for a Batch Item and scan the barcode during inventories.

³ After you establish a Recipe for your Batch Item, you must use the same ingredients and quantities consistently to have accurate reports. If you have another version of the Batch Item with different quantities or ingredients, then create a second, distinct Batch Item for that version.

Categories for Batch Items

Each Batch Item needs to be assigned a Category.

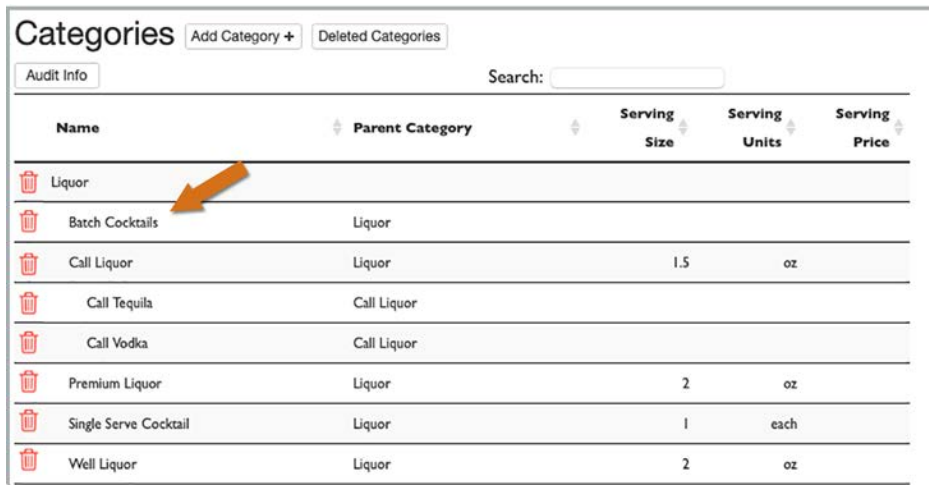
Batch Item Category vs. Ingredient Item Category

The ingredients in your Batch Items may have different Categories than the one you assign to a Batch Item. For example, **Vallarta Sangria** uses Items that are in the Categories **House Wine** and **Well Liquor**. When you run a Variance or Pour Cost Report, the ingredients will be accounted for based on the Categories assigned to the specific Items/Ingredients. For further details see the [Reports](#) section.

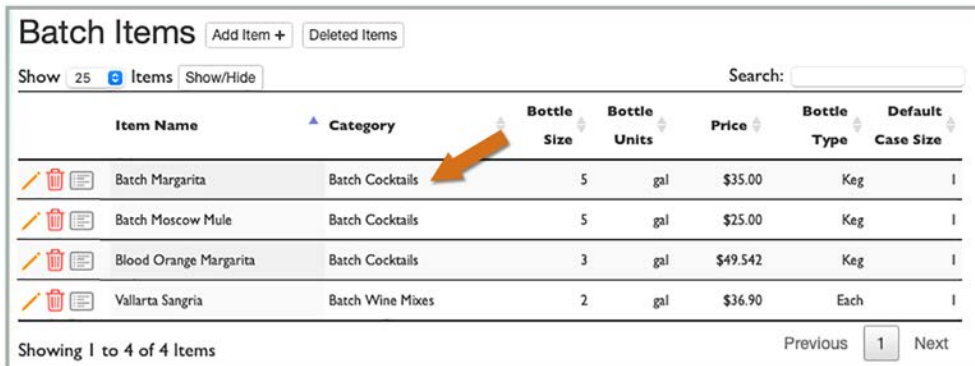
Creating Batch Item Categories

The steps for creating Categories for Batch Items are the same as creating any Category. Review the [BarkeepOnline User Guide](#) for all the instructions.

Below is an example of some of the Categories you might create for Batch Items.



Name	Parent Category	Serving Size	Serving Units	Serving Price
Liquor				
Batch Cocktails	Liquor			
Call Liquor	Liquor	1.5	oz	
Call Tequila	Call Liquor			
Call Vodka	Call Liquor			
Premium Liquor	Liquor	2	oz	
Single Serve Cocktail	Liquor	1	each	
Well Liquor	Liquor	2	oz	



Item Name	Category	Bottle Size	Bottle Units	Price	Bottle Type	Default Case Size
Batch Margarita	Batch Cocktails	5	gal	\$35.00	Keg	1
Batch Moscow Mule	Batch Cocktails	5	gal	\$25.00	Keg	1
Blood Orange Margarita	Batch Cocktails	3	gal	\$49.542	Keg	1
Vallarta Sangria	Batch Wine Mixes	2	gal	\$36.90	Each	1

See [Batch Item in Reports](#) section for how Categories are used in reports.

Copying a Batch Cocktail

The steps for copying a Batch Items are like the ones for copying any Item. The difference is you will also need to modify the ingredients in the Recipe for your new Batch Item.

See the [BarkeepOnline User Guide](#) for detailed steps for copying an Item.

The screenshot displays the 'Batch Item' form in the BarkeepOnline system. The form includes fields for Item Name (Batch Margarita), Price (Cost) (\$9.1619), Category (Batch Cocktails), and Default Case Size (1). Below the form is a 'Batch Item Recipe' table with columns for Item Name, Quantity, Quantity Type, and Cost. The table lists three ingredients: Barton Triple Sec (15 Oz, \$2.5069), Juarez Tequila (30 Oz, \$4.4365), and Sauza Margarita Mix (15 Oz, \$2.2185). An orange arrow points to the 'Copy' button in the top navigation bar, and another orange arrow points to the 'Barton Triple Sec' row in the recipe table.

Item Name	Quantity	Quantity Type	Cost
Barton Triple Sec	15	Oz	\$2.5069
Juarez Tequila	30	Oz	\$4.4365
Sauza Margarita Mix	15	Oz	\$2.2185

Modifying and Deactivating and Deleting Batch cocktails

You can make changes to any of your Batch Items using the same steps you use for modifying any Item in Barkeep.

Note: We recommend making older Batch Items inactive instead of deleting them.

Changing a Batch Item Recipe

We do not recommend changing the ingredients for an existing Batch Item. This can alter the results of older Barkeep Reports. Instead of changing the recipe we suggest:

1. Copying the existing Batch Item (see above).
2. Deactivate the existing Batch Item.
3. Next, modify the existing Batch Item's name, for example, call it **Batch Margarita Old**, and then rename the new, copied Batch Item **Batch Margarita**.
4. Modify the ingredients of your new Batch Item as needed.
5. The final steps are to delete the old Sales Item(s) that has used the old Batch Item in the Recipe.
6. Next, add a new Sales Item(s) with a Recipe using the new Batch Item.

Note: Replacing the Sales Items is a crucial step otherwise your old Sales Data will be altered and incorrect.

Batch Items vs. Sales Items

The way you set up and manage your Batch Items will seem familiar to the way you manage Sales Items with Barkeep.

Reminder: Batch Items are not Sales Items.

You will need to create Sales Items for your Batch Items. A Batch Item **a** might be used in more than one Sales Item. For example, with your house made sangria you might have a Sales Item for a glass and another one for a carafe or pitcher.

Review the [BarkeepOnline User Guide](#) for all the instructions for creating and modifying Sales Items.

The image below shows a Sales Item using your Batch Item **Vallarta Sangria**. Note how the Item **b** and the Quantity **c** in the Recipe reference the Batch Item and not the Items that make up the Batch Item.

Sales Items For Item Vallarta Sangria 8L Add Sales Item +

Show 25 Sales Items Search:

Name	Sales Item Number	Modifier	Description	Average Sales Price	Cost	Average Pour Cost
  a Sangria Carafe	611		Vallarta Sangria Carafe	\$25.00	\$5.53	22.12%
  Sangria Glass	610		Vallarta Sangria Glass	\$7.75	\$1.38	17.84%

Showing 1 to 2 of 2 Sales Items

Done Save Cancel

Sales Item

First Previous Next Last Delete Sales Item New Sales Item + Show Sales Entries

Sales Item Name

Sales Item Number

Modifier

Description

Average Sales Price

Cost


Pour Cost

Inactive?

Exclude?

Recipe

Add Recipe Item + Search:

Sales Item	Category	Item	Quantity	Quantity Type	Sales Percent
 Sangria Glass	House Wine	b Vallarta Sangria	c 8	Oz	100%

Showing 1 to 1 of 1 entries Previous Next

Note: Your Variance and Pour Cost Reports will use this information to calculate accurate reports based on the ingredients (Items) in the Batch Item.

Batch Items in Reports

Batch Items in Inventory Reports

When you download a Detail Report or Summary Report based on an Inventory, your report will show those Batch Items. In the example Summary Report shown below the **Batch Margarita** is in the **Batch Cocktails** Category and the **Vallarta Sangria** is assigned to the **House Wine** Category.

Item	Quantity	Servings	Price	Value
Castro Clubhouse				
<i>Generated by BarkeepOnline</i>				
August 10 2024, 3:05 pm				
Summary Report				
Inventory Type	Full			
Inventory Date	July 19 2024, 9:20 am			
Liquor				
Batch Cocktails				
Batch Margarita	1.2	1.2	\$9.16	\$10.99
Total Batch Cocktails	1.2	1.2		\$10.99
Call Liquor				
Aperitif				
Campari	5.7	96.39	\$22.00	\$125.40
Wine				
House Wine				
Bogle Pinot Noir	1	0	\$7.00	\$7.00
Merlot - Barefoot California :	12	101.4	\$17.99	\$215.88
Vallarta Sangria	2.7	91.29	\$46.75	\$126.21
Total House Wine	15.7	192.69		\$349.09

Batch Items and Order Reports

Batch Items are intended for batches that you create in-house. Your Batch Items are not included in Order Reports. We recommend that you consider your Batch Item usage when calculating the par levels for the ingredients (Items) used in your Batch Item Recipes.

Note: If you use the Order Report feature and your Full Inventories are less frequent, for example, monthly instead of weekly, we recommend doing Empties Inventories for your Batch Items.

Batch Items in Usage, Variance and Pour Cost Reports

The results in a Barkeep Usage Report are based on the Items used. The Usage Report factors in the usage of each Batch Item, but the report will show the usage for the ingredients not the Batch Item itself. For example, you would see the amount of **Juarez Tequila** and **Barton's Triple Sec** used but the report would not show the usage for the Margarita Batch Item.

The same rule applies to Variance and Pour Cost Reports because they use the data generated in a Usage Report. If you have questions regarding report results, please contact us at support@barkeepapp.com

Note: When you click on an Item in your Variance Report you can review all the inventories factored into the Report which counted that Item. You will see your Batch Items listed because their ingredients include that Item. The same is true for Usage Reports and Pour Cost Reports.

Variance Report Done

Start Inventory Full Inventory 07/19/2024 332 Items Include Sales Data from 7/19/2024

End Inventory

Use Default Item

Exclude Batch

Show Pricing De

Your Variance Report will compare the current inventory to the inventory on the Sales End Date and the Sales End Date are before the current date.

Run Report Download

Variance Summary Variance Report

Inventory Entries for Juarez Tequila

Show 25 entries Audit Info Search:

Type	Date	Index	Item	Location	Quantity	Quantity Type
Full	08/14/2024	253	Juarez Tequila 1L	Store Room	5	Bottles
Full	08/14/2024	320	Juarez Tequila 1L	Store Room	9	Bottles
Full	08/14/2024	338	Margarita 3gal	Bar 1	1.2	Each
Full	08/14/2024	341	Blood Orange Margarita 3gal	Bar 1	0.8	Kegs
Full	08/14/2024	342	Blood Orange Margarita 3gal	Patio Bar	0.5	Kegs
Transfer from Store R...	08/12/2024	0	Blood Orange Margarita 3gal	Bar 1	1	Kegs
Transfer from Store R...	08/12/2024	2	Blood Orange Margarita 3gal	Patio Bar	1	Kegs
Transfer from Store R...	08/12/2024	2	Juarez Tequila 1L	Bar 1	5	Bottles

Item

- DeKuyper Blue Curacao
- DeKuyper Buttershots
- Juarez Tequila
- All Items
- Total Well Liqueur

Batch Item Pour Cost

If you need to review the Pour Cost for an individual Batch Item, you can review Sales Item(s) for that Batch Item to check the Pour Cost. Keep in mind, the Pour Cost can be different for other Sales Items due to serving size and serving price (based on your Sales Data).

Done Save Cancel

Sales Item

First Previous Next Last Delete Sales Item New Sales Item Show Sales Entries

Sales Item Name Sangria Glass

Sales Item Number 610

Modifier

Description Vallarta Sangria Glass

Average Sales Price \$7.75

Cost \$1.38

Pour Cost 17.84%

Inactive?

Exclude?

Recipe

Add Recipe Item + Search:

Sales Item	Category	Item	Quantity	Quantity Type	Sales Percent
Sangria Glass	House Wine	Vallarta Sangria	8	Oz	100%

Showing 1 to 1 of 1 entries Previous 1 Next

Batch Items with BarkeepApp

IPad or iPhone – these instructions are the same

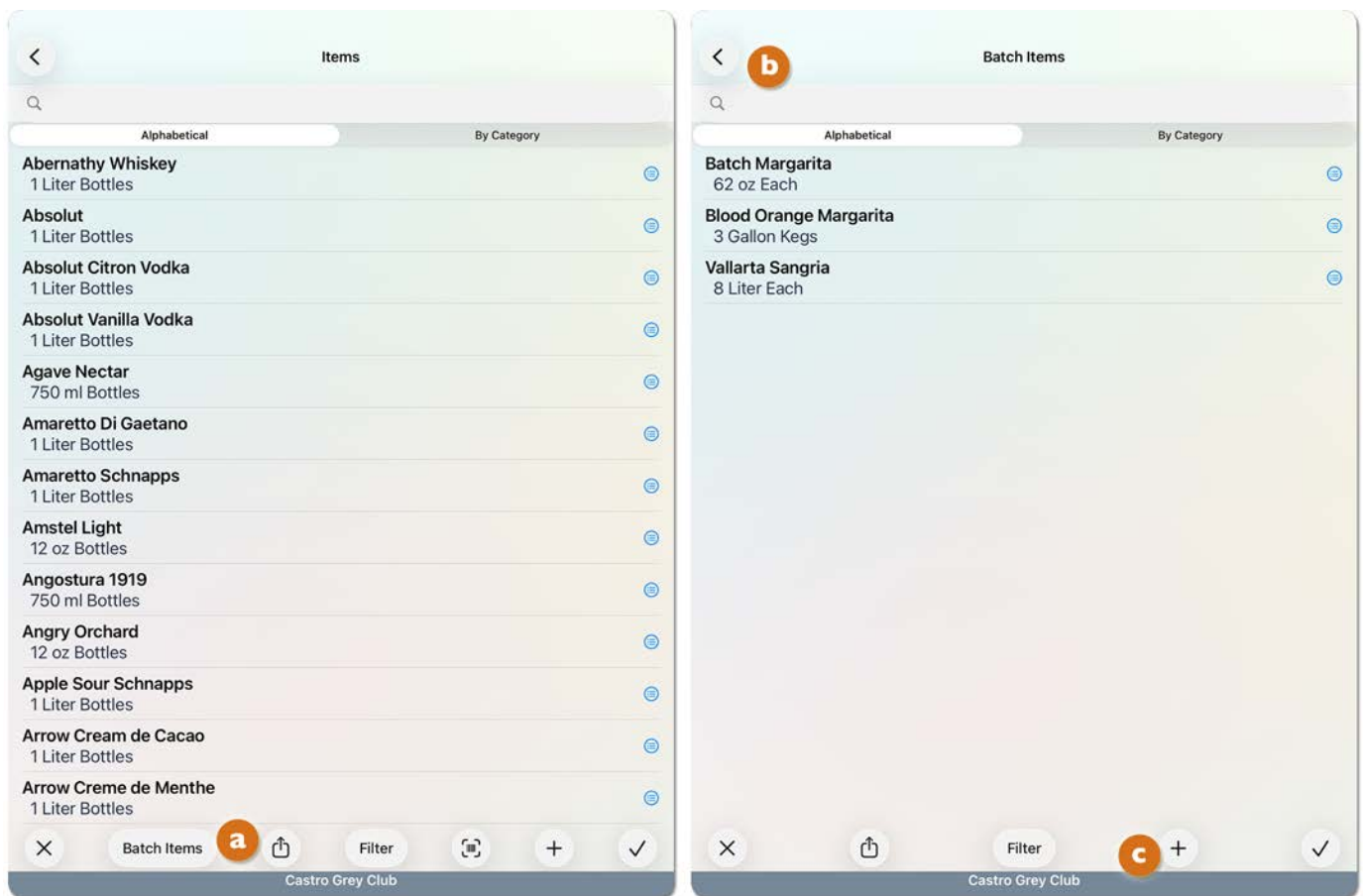
The images in this User Guide show BarkeepApp 7.0 running with iOS version 12.0 on an iPad. iPhone and iPod Touch users will find the BarkeepApp interface is similar but in smaller formats.

Creating Batch Items with BarkeepApp

The steps for creating new Batch Items with BarkeepApp are very similar to creating any Item manually.

To add an Item manually:

1. Select “Items” on the Main Screen.
2. On the Items screen, select **Batch Items** **a** in the bottom toolbar.
3. You will see a screen with a list of your existing Batch Items screen. **b**
4. On the Batch Items screen, select the **+** icon **c** in the bottom toolbar to create a new Batch Item.

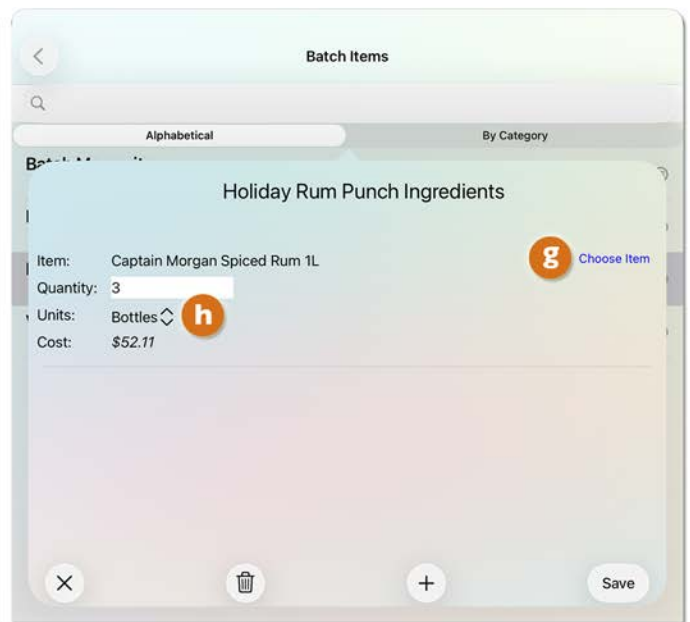
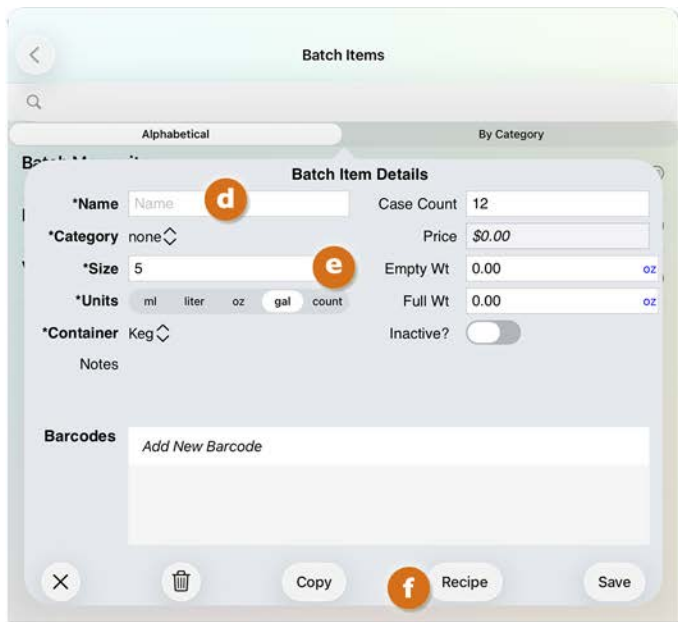


Modifying Batch Items with BarkeepApp

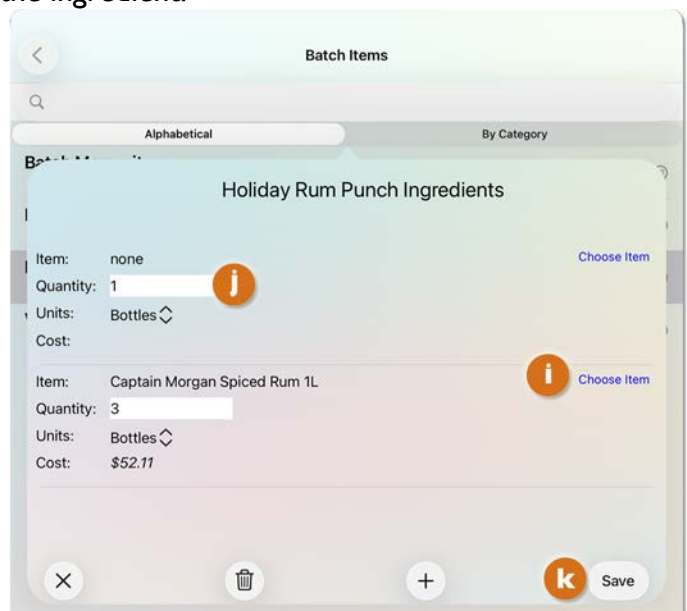
If you need to make changes to your existing Batch Items, follow steps 1 to 3 above and choose Batch Items from the list to modify your Batch Item as needed.

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Creating Batch Items (cont.)



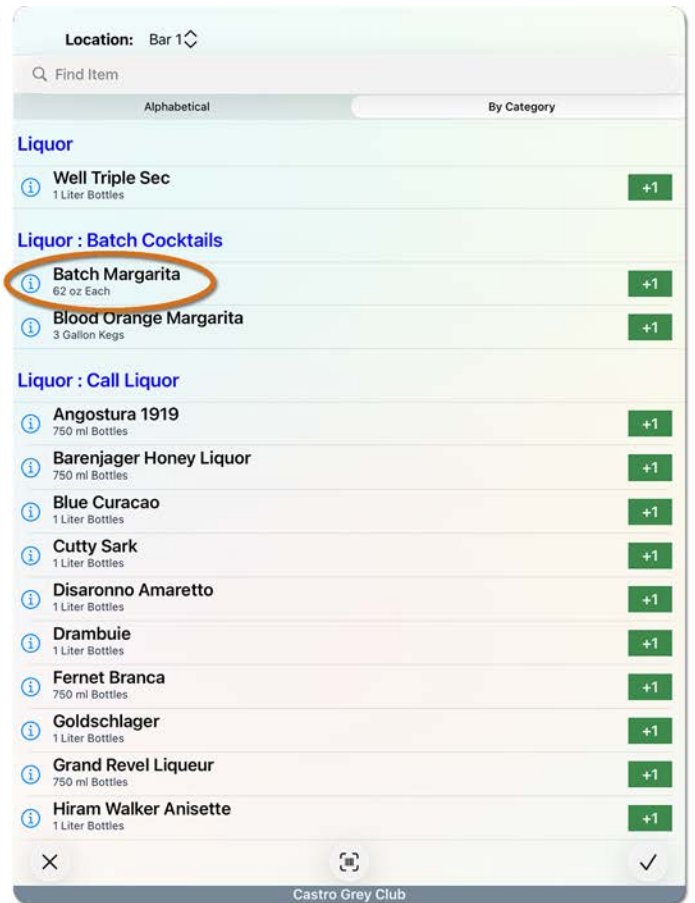
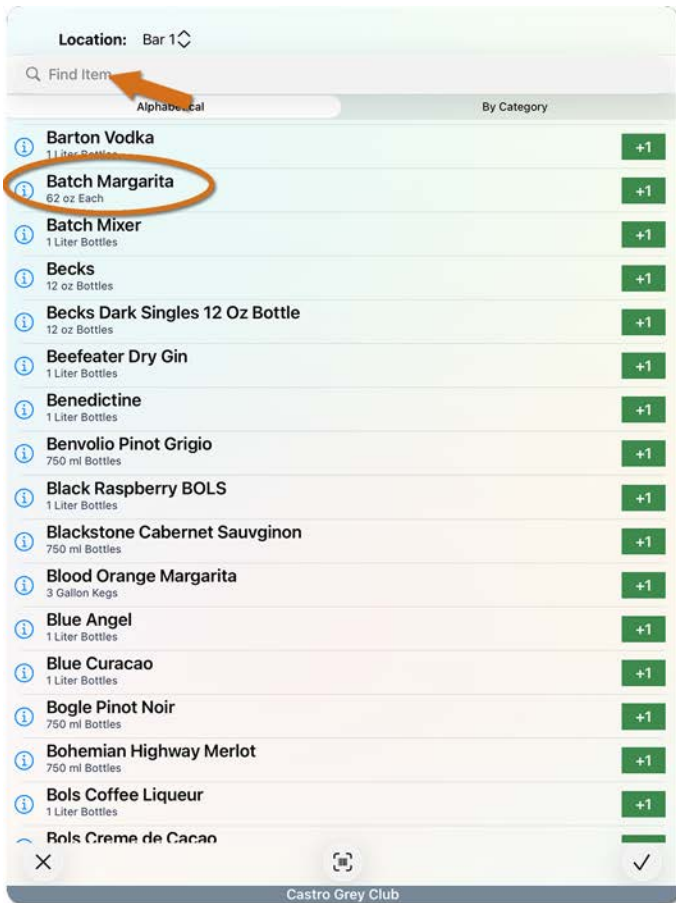
5. You will see a blank, new Batch Item Details pop-up screen.
6. Press the name field **d** to activate the keyboard and begin entering details.
7. Add the Category, Size, Units and Container Type. **e**
8. If you plan to weigh your Batch Items in inventories you will need to add full and empty weights for your container, see [Weighing Batch Items](#) for details.
9. On the Batch Item Details pop-up screen select **Recipe** **f** in the bottom toolbar.
10. You will see a new pop-up screen with ingredients.
11. Select **Choose Item** **g** for a selection of Item (ingredients).
12. Add a Quantity and Units **h** to the Recipe for the ingredient.
13. You can follow the same steps **i** to add additional ingredients. **j**
14. When you are finished adding ingredients, **k** press **Save** at the top of the Items screen.



If you prefer to use your laptop or desktop computer, see the section for [Creating Batch Items with BarkeepOnline](#).

Inventories

With BarkeepApp or using your laptop or desktop computer, the steps for adding Batch Items to a Barkeep inventory are the same as with any Item. After you create a Batch Item you will see it in your list of Items you can add to an inventory. You can scroll or search for Batch Items just like all other Items to add to an Inventory.



continue to the next page

Batch Inventories (cont.)

Adding Batch Items to Inventories

The steps for adding Batch Items to an inventory are the same.

- You add full Batch Items like any other full bottle, can or keg.
- You can add partial Batch Items to inventories by estimating quantities, e.g., .25, .5, etc.
- You can weigh your partial containers, see [Weighing Batch Items](#) for details.
When you add partial Batch Item by weight, your inventory quantities can be as accurate as when you weigh any partial bottle.
- A Repeat Inventory will include Batch Items just like any other Item in a Repeat Inventory.

What if a Batch Item's container is *larger* than the total ingredients in a Batch Item?

- **Full Batch #1**

An example where a Batch Item's ingredients, including any non-inventoried mixers, will equal the size of the container.

For example, below there is 5 gallons of ingredients in a 5-gallon container in a newly made Batch Item. If you need to estimate the quantity of a partially full container, that estimate will be as good as when you look at any partial bottle and say .5, .3, etc.

- **Full Batch #2**

In this example, you use a 5-gallon container for a full Batch Item that totals 544 fluid ounces (4.25 gallons) of ingredients. If you were to look at a "half full" container and enter .5 as your quantity, that would not be accurate.

5 Gallon Barrel
Full Batch #1



Ingredients
640 fl. oz (5 gallons)

Full Batch #2



Ingredients
544 fl. oz (4.25 gallons)

- I. With **Full Batch #2**, you will have to be careful when estimating partial quantities. The best way to handle this is to weigh the partial batch. However, a very low-tech solution will also work well. Mark the outside of the container when it has a full Batch Item so you can better gage the quantity when it is partially full.

If you need specific, detailed instructions for adding Items to any Inventory as well as using a digital scale, refer to the [BarkeepApp User Guide](#).

continue to the next page

Batch Inventories (cont.)

Weighing Batch Items

Just like regular Items, you can add a partial container of a Batch Item to an inventory by weighing it.

- For each Batch Item you will have to add a full and empty weight for the container before you weigh a Batch Item.
- You can weigh smaller containers with the **Etekcity Luminary** digital scale purchased via barkeepapp.com.
 - Keep in mind the capacity for the scale is (22 lb/10 kg).
 - Larger containers will damage the scale
- You can weigh larger containers with a freight scale and enter the weight manually.



You can review all the steps for setting up and weighing Items in to the [BarkeepApp User Guide](#).

Can I add batch cocktails to Banquet Inventories?

Yes! You add your batch cocktails to Banquet Inventories just like you do with regular inventories. You do not need a separate inventory for your Batch Cocktail Items. You can add your batch cocktails to Full Inventories as well as Transfer, Waste and Empties Inventories.

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Batch Inventories (cont.)

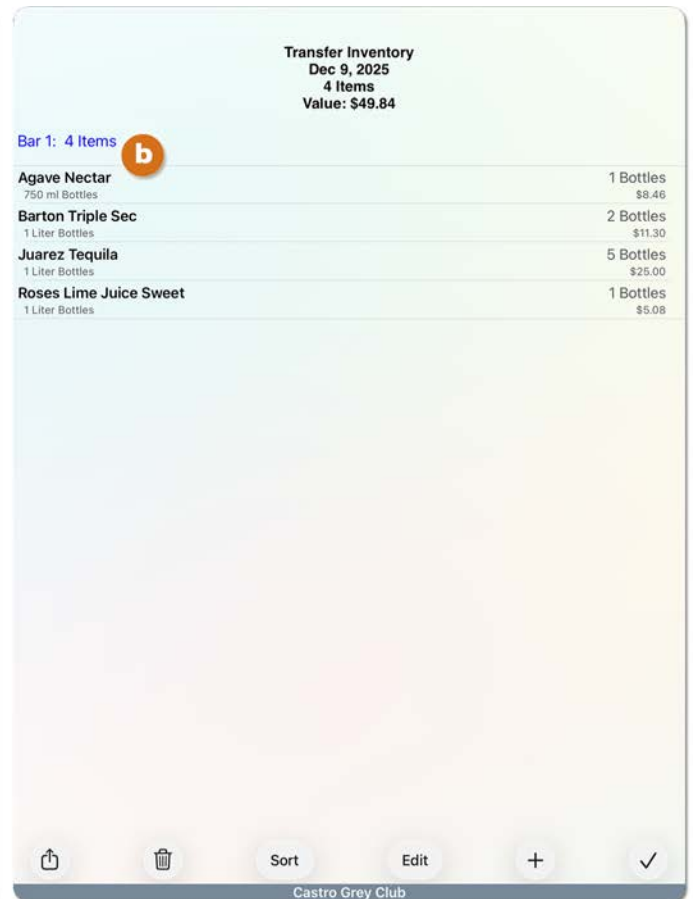
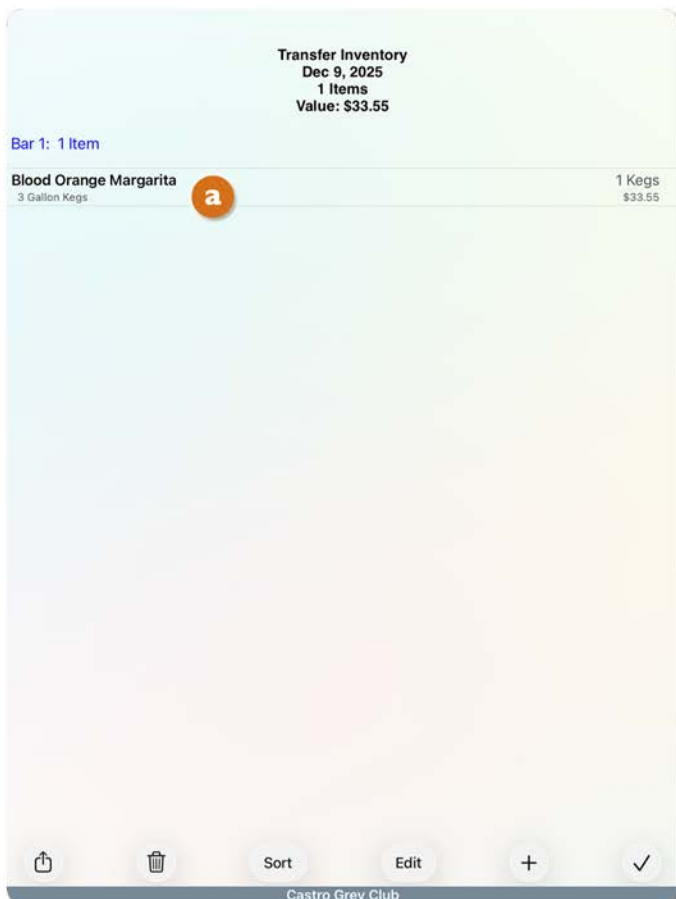
Batch Items and Transfer Inventories

Transfer Inventories are optional, but they are the best way to keep track when you and your staff move Items (product) from Location to Location. If you run Usage Reports and Variance Costs Reports *by Location*, Transfer Inventories are crucial for accurate reports.

If you plan to run reports *by Location*, we recommend creating a Transfer Inventory for when you prepare Batch Items and/or move the ingredients (Items).

For example, if you put together a Batch Item in one of your bar Locations and you move the ingredients from a storage Location, a Transfer Inventory will account for the move. There are two options to do this:

- Assemble the ingredients for the Batch Item and then do a Transfer Inventory where you move the Batch Item **a** from Location to Location.
If you assemble and make your Batch Item in a Location and then when it is ready, you move the Batch Item to another Location, use this option.
- Or do a Transfer Inventory where you move the ingredients. **b** With Transfer Inventories you have only a single *from Location* but can move to more than one *to Location*. If your ingredients are stored in different Locations, you will need more than one Transfer Inventory.



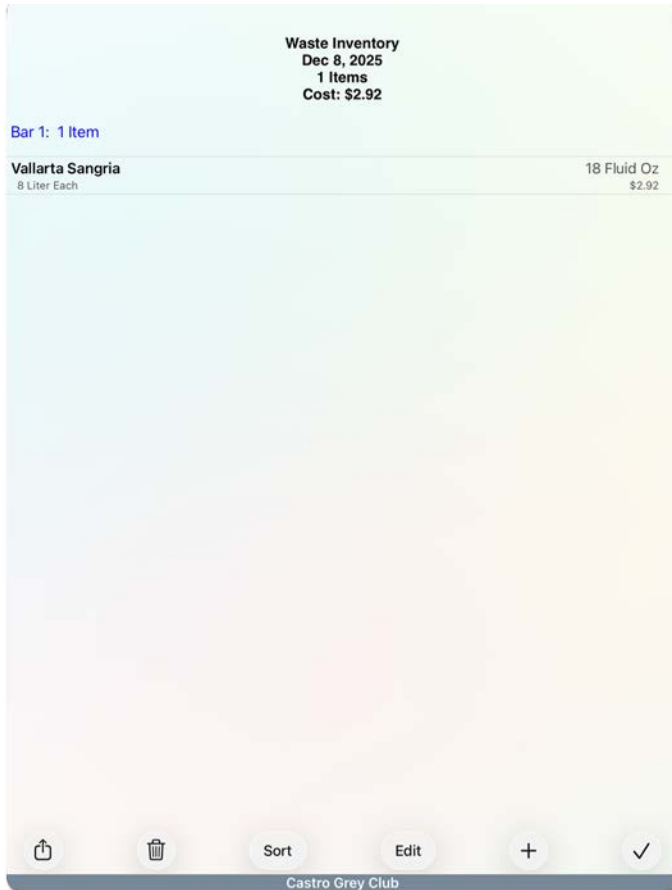
Note: If you move whole bottles (like in the above example) but your Recipe for the Batch Item requires some partial bottles. Those “left over” partial bottles will be counted in the next Full Inventory where they are Located.

Moving whole bottles also accounts for the difference in value in the example, because the quantities used for the Batch Item do not equal the total value of the bottles transferred.

Batch Inventories (cont.)

Batch Items and Waste Inventories

Waste Inventories are used to track when product is lost rather than used. If waste or breakage occurs, you must do a Waste Inventory to have accurate reports. With Batch Items there might be circumstances where some batches “go off” and need to be poured down the drain. We recommend accounting for that unused product with a Waste Inventory.



If you have questions regarding using Batch Items, please contact us at support@barkeepapp.com