WS → Dx5 Term Conversion Glossary

WS Term	Dx5 Term	Location in Dx5	Related Articles
Add PG & Remove PG (From Barrel Rackhouse)	Solera Transfer Process: DISTILL x 5 allows users to transfer spirit between barrels using the Solera tool. This tool must first be enabled within your system's settings in order for the tool to appear within the Barrel Actions menu in Dx5.	Operations → Overview → Batch Actions → Solera	• [Operations: Solera Transfer Process (Read Time: 4 mins)](#)
Adjust / Gauge Tank PG	Recalibrate Batch: Recalibrating a batch is simple a way to adjust your batch in DISTILL x 5 to match the real life volume and/or alcohol content of your batch on the floor. It can be used in place of cutting a batch, though it won't calculate the water addition.	Batch Actions → Recalibrate	• [Operations: Recalibrate Batch (Read Time: 2 mins)](#)
Associations: • **Vendor** • **DSP** • **Customer** • **Contact** • **Owner**	Contacts: • Supplier: The contact listed in your system from whom you received raw materials, supplies, and bulk spirits. • In Bond Recipients: A designated distillery contact that must be configured in your system to facilitate the transfer of spirits out of bond. • Customer/Distributors: Contacts in your system to whom finished products will be shipped, including those involved in tax determination, tasting rooms, ABC stores, and distributors.	Contacts → All; - Suppliers; In-Bond Recipients; Customers	• [Contacts: Add New Customer (Video)](#) • [Contacts: Add New Supplier (Video)](#) • [Contacts: Add In-Bond Recipient (Video)](#)
Barrel Dump	Harvest Barrel: Harvesting, In DISTILL x 5, is the process of dumping barrels to recover spirits. Can be recorded as full or partial harvests. Barrel volumes are moved to a selected destination batch.	Operations → Overview → Barrel Actions → Harvest Barrels	• [Operations: Harvest Barrels (Read Time: 5 mins)](#)

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Batching Run	Add Materials (Run a Formula) • Apply a **Batch Type Modifier**[1] to transform spirit A into spirit B (e.g., initial Batch Type: NGS, final Batch Type: Liqueur XX).	Operations → Overview → Batch Actions → + Add Materials	• [Operations: Add Material to Batch (Read Time: 1 min)](#) • [Definitions: Recipes and Formulas Explained](#)
Case Packs	Storage Profile: A storage profile allows you to add additional means of how your inventory is stored, including cases of finished product. Supplies and raw materials can have multiple storage profiles, but the container type must be different for each additional profile, i.e. you cannot have multiple bags for a single item.	Operations → Setup → Finished Products → Blue Down Arrow → Add Storage	• [Inventory: Add Case Size Storage Profile to Finished Products (Video)](#) • [Inventory: Add Case Size/Storage Profile (Read Time: 1 min)](#)
Containers • **Fermenters** • **Tanks**	Vessels • Carboy • Cooker/Kettle • Drum • Fermenter (Conical) • Fermenter (Traditional) • Holding Tank (Cylindrical) • Holding Tank (Square) • Lauter • Mash Tun • Still (Column) • Still (Pot) • Still (Pot/Column) • Tote	Operations → Setup → Setup Actions → + Add New Vessel	• [Setup: Add a Vessel Stage (Read Time: 1 min)](#) • [Setup: Add New Vessel (Video)](#)

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Data Archives	Files: a data storage location where Users can also upload PDF/Excel files of their physical inventory data to their DISTILL x 5 Files Portal if desired. Doing so will help keep your records in the 'cloud' and can be easily retrieved in the event of an audit.	Admin → Files → Add New File	–
Delete Transactions & Hidden Items	Undo / Restore to Vessel / Deactivate	Batch Log; Batch History	[Operations: Restore to Vessel (Read Time: 2 mins)](#) [Inventory: Deactivate Raw Material/Supply (Read Time: 1 min)](#) [Inventory: Deactivate Storage Profile](#)
Fermentation Run	Start New Mash/Cook or Fermentation	Operations → Overview and click the orange "+ Start New Batch"	[Production: Add Materials to a Mash/Cook (Video)](#) [Production: Start New Mash/Cook or Fermentation (Read Time: 4 mins)](#)
Full Asset List Report	Inventory Report: Inventory Reports in DISTILL x 5 provide detailed snapshots of current or historical inventory levels across materials, products, and warehouses. These reports are generated through a reporting queue system to reduce system lag and improve performance.	Inventory → Reports	[Inventory Reporting Queue (Read Time: 1 min)](#)

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Internal Spirit Types	Batch Type: This is the identity of your spirit. Batch types allow you to use your spirit in your system, and to ensure that your spirit is properly recorded in your reports.	Operations → Setup → Setup Actions → + Add Batch Types	• Setup: Create New Batch Type (Video) • Setup: Example Batch Type Configurations (Read Time: 3 minutes) • Best Practices: FAQs on Changing Batch Types
Mash Bill	Recipe : A bill of materials that include all fermentable materials for mash/cook recipes, and any other ingredients for which you would like Dx5 to track inventory movement. This does not need to include water unless your distillery tracks its usage.	Operations → Setup → Setup Actions → Add New Recipe	• Setup: Add New Recipe (Read Time: 3 mins) • Production: Start New Batch & Apply Recipe (Video)
Physical Inventory View	Inventory Reconciliation: This tool will allow you to perform a physical inventory (also known as a cycle count or stock take) of your Finished Products (Bottled/Canned), VAPs, Raw Materials, and Supplies.	Inventory → Overview → Reconcile	• Use Inventory Reconciliation to Perform and Record Inventory Adjustments in Bulk
Product Master	A Finished Product Item represents bottled or packaged spirits that are ready for sale or distribution. These products can be stored either in bond or in a tax-paid location, and they are tracked for inventory, compliance, and fulfillment purposes.	Inventory → Overview; Operations → Setup → Setup Actions → +Add Item	• Inventory: Add New Finished Product (Read Time: 5 mins) • Inventory: Attach Supplies to Finished Product (Video) • Inventory: Attach Supplies to Finished Product (Video)

QBO Export	Accounting[2]	Accounting → Overview	• Xero Accounting Integration • Quickbooks Online Integration – FIVE x 5 Support
Rackhouses	Rackhouses: DISTILL x 5 users may add rackhouses to organize barrels by location. Functionality isn't limited by location, but this distinction may improve visibility into aging operations. To add a rackhouse: • **Advanced Barrel Management → Barrel Mover[3]**	Operations → Setup → Setup Actions → + Add Rackhouse;	• Setup: Add a Rackhouse • Advanced Barrel Management: Barrel Mover
Raw Materials: Empty Barrel Stock	Barrel Profiles: Barrel Profiles in DISTILL x 5 are built to identify the wooden cooperage Types and Sizes users will Fill using Dx5 Barrel Actions. To create a new Barrel Profile in DISTILL x 5:	Operations → Setup → Setup Actions → +Add Barrel Profile	• Setup: Add Barrel Profile • Setup: Add Empty Barrels (Read Time: 1 min)
Raw Materials: Fermentables	Raw Material Items: In DISTILL x 5, all raw materials that are considered fermentable must be reported as such to the TTB on the Federal Production report. If you need to add a custom category:	Operations → Setup or Overview → Add Item	• Inventory: Add New Raw Material (Read Time: 4 mins) • Inventory: Add New Raw Material (Video) • Inventory: Add/Edit Fermentable Reporting Types to Raw Materials

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Raw Materials: Packaging/Filtering	Supply Items: Supply items are defined as those used in Packaging/Bottling runs - think about your bottles, caps, cases, shrink wrap, etc. Other types of Supply items can be stored in this category, but it is a system requirement that Supply items which will be attached to Finished Products for depletion during Packaging/Bottling are stored within this category specifically.	Inventory → Overview → + Add Item → Select "Supplies"	• Inventory: Add New Supply Item (Read Time: 4 mins) • Inventory: Add New Supply (Video) • Inventory: Attach Supplies to Finished Product (Read Time: 1 min)
Recipe	Formula: In Dx5, selecting "Designate as Formula" automates proof adjustments based on start and end proofs during recipe application when adding consumed blending materials.	Operations → Overview → Batch Details → Batch Actions → Add Materials	• Processing: Applying RTD Recipe to Bulk Spirit (Read Time: 3 mins) • Operations: Using Simple Syrup/Sugar Syrup (Read Time: 2 mins) • Definitions: Recipes and Formulas Explained
Refill Existing Barrels from "Manage Empty Barrel" page.	Fill Pre-Existing (Named) Barrels: Use when you're filling a barrel that was previously emptied in your DISTILL x 5 system.	Operations → Overview → Barrel Actions → Fill Pre-existing (Named) Barrels":	• Operations: Fill Pre-Existing (Named) Barrel (Read Time: 4 mins)
Starting Tank Inventory	Setup Existing Batch: This action should only be used during DISTILL x 5 Setup or at the recommendation of the Fx5 Support team. This system action is only available during Dx5 System Setup, and for entering details of "in-progress" Batches of spirit which should be considered On-Hand upon Dx5 Federal Report Initialization.	Operations → Setup → Set Up Existing Batch	• Setup Set Up Existing Batch

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Transaction	Batch: A batch is defined as any liquid inside a vessel. A new batch is created when liquid is transferred into an empty tank. A batch is closed when all liquid contained within a vessel is completely emptied out of the vessel, and the vessel has gone through physical sanitation.	Operations → Overview; Batch History	• [Definitions: Vessel, Batch, Batch Type Terminology (Video)](#)
Transaction Post Date, Start Month	Initialize Books/Close Books: The process of activating your federal reporting in the system for the first time or at the beginning of your reporting period. (Can only be done by a Fx5 Support Team Member.) Closing Books: Should be done at the beginning of a new reporting month. It's essentially the groundwork for maintaining accurate reporting records. (Can be done by a local system Admin users).	Reports → Close Books	• [Reports: Close Books Process (Video)](#) • [Reports: FAQs on Close Books Process (Read Time: 3 mins)](#) • [Reporting: Initialize Books Checklist](#)
Transfer In Bond Inbound → Barrels	Receive Full Barrels • Requirements: Bonded Products w/ Batch Types and Supplier, Supplier, Barrel Profile	Operations → Storage or Processing → Barrel Actions → ↓ Receive Full Barrels	• [Operations: Receive Barrels In-Bond (Read Time: 2 mins)](#) • [Operations: Receive Barrels In-Bond (Video)](#)
Transfer In Bond Inbound → Finished Products	Adjust Finished Product Inventory (Received into Bond) • Requirements: Finished Product, Supplier, Barrel Profile	Inventory → Overview → Find Finished Product → Adjust Quantities - Tax Status: "Bonded" - Adjustment Type: "Addition" → Reason: "Received"	• [Inventory: Receive Finished Product (Bottles/Cases) into Dx5 Inventory (Read Time: 6 mins)](#) • [Return of Tax Paid Spirits to Bond: How, When and Why (Read Time: 4 mins)](#)

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Transfer In Bond Inbound → New Tank/Tote	Receive Bulk Spirit • Requirements: Vessel, Batch Type, Supplier, Bonded Products[4] w/ Batch Type and Supplier	Operations → Bonded Transactions → ↓ Receive Spirits	• [Operations: Receive Spirit In-Bond (Read Time: 2 mins)](#) • [Operations: Receive Spirit In-Bond (Video)](#)
Transfer In Bond Outbound → Barrels	Transfer Barrels In-Bond • Requirements: Bonded Products[4] w/ Batch Types and Supplier, Supplier, Barrel Profile	Operations → Storage → Barrel Actions → ↑ Transfer Barrels In-Bond	• [Create New TIB-Out Order (Read Time: 5 min)](#)
Transfer In Bond Outbound → Finished Product	Create Bonded Order • Requirements: Bonded Products[4] w/ Batch Types and Supplier, Supplier, Barrel Profile	Fulfillment → Bonded → + Add New Bonded Orders	• [Fulfillment: Shipping Finished Product In-Bond (Read Time: 3 mins)](#)
Transfer In Bond Outbound → New Tank/Tote	Withdraw Spirit • Requirements: **Bonded Products**[4] w/ Batch Types and Supplier, In-Bond Recipient	Operations → Overview → Batch Actions → - Withdraw Spirit Withdrawal Type: Transfer Out In-Bond	• [Operations: Withdraw Spirit](#)

TTB Reports & Report Checkers	• Taxes and Reports
	
	    • Federal Production
	
	    • Federal Storage
	
	    • Federal Processing
	
	    • Federal Excise → Excise Shipments by Date
	
	    • **Itemized Tables.**[5]
	
	Note: Reports must be initialized to activate this report.
		Reports → Taxes & Reports → Select Current Reporting Month	• [Reporting: TTB Reporting & Batch Workflow (Video)](#)

WS Logs / Daily Logs	OPS Reports: Operational reports that offer important insights into system transaction data. This also includes the **COGS Report.**[6] OR: "Add New Raw Materials" to a batch, similar to a consumption run in WS.	Reports → Ops Reports Operations → Overview → Batch Actions → + Add Materials	• [Operations: Withdraw Spirit](#) • [Co-Packing: Withdraw Bulk Spirit (Read Time: 2 mins)](#)

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Footnotes:

1. **Accounting ($30/month add-on):**

   - DISTILL x 5 supports seamless accounting integrations with Xero and QuickBooks Online (QBO). The Dx5 + Xero/QBO integration uses APIs to automatically post financial data, helping reduce manual entry and simplify your bookkeeping process.

   - To get started, reach out to your Migration Specialist or a member of the Support Team.
     Note: Accounting Integration is included at no extra cost for all Enterprise partners.

2. **Batch Type Modifier:**

   - This tool will set the starting and ending batch type for a recipe/formulas' application, most commonly used in Processing batches. For example, a batch starts as NGS but, through the application of a recipe, ends as liqueur XX.

3. **Enhanced Barrel Management Add-On ($25/month add-on):**

   - Take your barrel tracking to the next level with the Enhanced Barrel Management package. This add-on is included at no additional cost for customers on Tier 4 pricing or higher. To enable this feature, contact your Migration Specialist or a member of the Support Team.

   - Included Features:

   - Barrel Owner Codes - Organize your barrel inventory by assigning barrels to specific owners or groups using customizable codes (text, numbers, or a combination).

   - Barrel Mover - Quickly move barrels to new rackhouse locations in bulk using QR code scanning or advanced search tools—perfect for high-volume barrel operations.

   - CSV Barrel Updater - Update barrel details like owner code, cost, rackhouse, or row/height/depth in bulk via a downloadable CSV template, saving time on large updates.
     Note: Enhanced Barrel Management Add-On is included at no additional cost for our partners on Tier 4 pricing or higher.

4. **Bonded Products:**

   - A setup item within Dx5 that requires an associated batch type for any spirits or alcoholic liquids received from a supplier under In-Bond status by your distillery.

   - [Setup: Add New Bonded Product (Read Time: 2 mins)](#)

5. **Itemized Tables:**

   - Specialized tables used across various reports and records that break down detailed, line-level activity for easier tracking, auditing, and reconciliation. They're especially helpful when dealing with complex inventory or production scenarios, offering visibility into individual components or actions within a larger transaction or process.

6. **COGS Report:**

   - Built to display all of your Order Line Items from the chosen period, so long as they're marked as Shipped