

GRAPE CRUSH INQUIRY EXCEL WORKBOOK INSTRUCTIONS

The Grape Crush and Purchase Inquiry is available in both paper (pdf) format and in a spreadsheet format. This document is instructions for completing the spreadsheet format.

This spreadsheet is a Microsoft Office Excel workbook file. If you are using a different spreadsheet software (Apple Numbers, Google Sheets, OpenOffice Calc, et Al.), the formulas may get broken.

If you have any questions, please call the Grape Crush Team at 916-738-6569 or email GrapeCrushTeam@usda.gov.

STEP 1 Getting Started

1. Did you crush any grapes (at your facility) this year? ☐ Yes or ☐ No
2. Did you purchase any grapes directly from growers this year? ☐ Yes or ☐ No

If “yes” to either question, you must complete and return the following:

- Grape Crush & Purchase Inquiry Excel workbook
- Printed copy of the Assessment Totals tab of the Excel workbook
- Signed Excel Certification (blue paper)
- Check for Pierce’s disease assessment

If “no” to *both* questions, please complete and return the “Certification of No Purchasing or Crushing” (yellow paper). You do not have to complete any other forms for this report.

STEP 2 Download the Workbook

On the Internet, go to the web site www.cdfa.ca.gov/mkt/grapecrush and click on the Grape Crush Workbook link to download the file.

There are three versions of the workbook:

- EZ Form – This is a simplified questionnaire that can be used in certain situations. Many wineries can use this format.
- Regular Form – This is the standard questionnaire.
- MOG Form – This format allows the winery to keep track of material other than grapes (MOG) and enter up to 3,000 lines of data on the Data Page.

GENERAL NOTES

Before you begin entering data, please note the following:

- This workbook contains different tabs for different sections of the questionnaire. The tabs are arranged so you can work on them from left to right.
- Every line in this workbook needs a variety name, district number, tonnage and brix.
- Spell the variety names as they are spelled in the 'Varieties' worksheet. Doing so will allow your Pierce's Disease Assessment to calculate. If you use a different spelling, the calculation will be wrong or it simply will not calculate.
- The come cells in this workbook are password protected to prevent accidental damage to the formulas.
- **DO NOT cut and paste** – this can damage the workbook. If you need to move data, please copy and paste-special-values instead.

STEP 3 Entering Data

Introduction

In the Introduction worksheet, please enter your 9-digit ID, name of your firm, date, preparer/contact name, telephone number, and e-mail address. Then answer the two screening questions. If you are using the EZ Form, also answer the additional screening questions on the right side of the page.

Your 9-digit ID is on your mailing label on the cover of your Grape Crush and Purchase Inquiry. The 9-digit number begins with a 3, 4, 7, 8, or 9. This ID is not the same as your processor license number.

Questions 1, 1a, 1b (Omitted from the EZ Form)

Go to the Questions 1, 1a and 1b worksheet and answer the questions. If you answer "yes" to question 1b "Did you purchase & resell any grapes?", you need to enter your data (Operation Name, Variety, District, Tons Resold, Brix) into the table below. The tonnages will automatically sum for you.

Question 1c (Omitted from the EZ Form)

Go to the Question 1c worksheet and answer the question "Did you repurchase grapes from a seller, who was not the original grower?" If you answer "yes" to Question 1c, you need to enter your data (Operation Name, Variety, District, Tons Repurchased, Brix) into the table below. The tonnages will automatically sum for you.

There is one additional question on the right: "Will these repurchased grapes be crushed by another processor?" If the answer is "yes" for the grapes entered on that row, enter the value "1" into the cell and type the "Processor Name Where Crushed" for these grapes. If you crushed these grapes at your facility, leave it blank.

Question 2

Go to the Question 2 worksheet and answer the question “Were grapes crushed for you by other processors?” If you answer “yes” to Question 2, you need to enter your data (Crusher Name, Variety, District, Tons, Brix) into the table below. The tonnages will automatically sum for you.

There is one additional question on the right: “Was tonnage purchased or grown?”

- GROWN GRAPES: Answer “no” by leaving the cell blank. The Pierce’s Disease Assessment will automatically calculate for the grapes you grow.
- PURCHASED GRAPES: Answer “yes” by entering a “1” in the cell. The Pierce’s Disease Assessment amount will NOT calculate for these grapes in this worksheet. The assessment for these grapes will be calculated based on the information you enter later in the Data Page.

Question 3 (Omitted from the EZ Form)

Go to the Question 3 worksheet and answer the question “Did you crush grapes for any processors and/or firms or growers, who purchased or crushed any grapes?” If you answer “yes” to Question 3, you need to enter your data (Operation Name, Variety, District, Tons, Brix) into the table below. The tonnages will automatically sum for you.

If you crush grapes for an operation that only grows grapes (they do NOT purchase or crush, so they will not submit their own Grape Crush Inquiry), that information goes in Question 4 instead.

Question 4 (Omitted from the EZ Form)

Go to the Question 4 worksheet and answer the question “Did you crush grapes for growers, who DID NOT PURCHASE grapes?” If you answer “yes” to Question 4, you need to enter your data (Vineyard or Grower Name, Variety Crushed, District Where Grown, Over the Scale Tons, Wtd. Average Degrees Brix) into the table below. The tonnages will automatically sum for you.

If you crush grapes for an operation that purchases or crushes any grapes (that is, they will submit their own Grape Crush Inquiry), that information goes in Question 3 instead.

The Pierce’s Disease Assessment will automatically calculate (Excel columns K through M) based on the information you enter in this question. You can use this information to bill the growers for the Pierce’s Disease Assessment.

Data Page

This page, once completed, will contain information about all of the **grapes you purchased** and all of the **grapes you crushed**. Section I (green header) has information about the tonnage you crushed. Section II (blue header) has information about the tonnage you purchased.

Data from the workbook questions 1c, 3, and 4 are automatically subtotaled into the Data Page. Information from these three questions **does not** need to be re-entered into the Data Page.

If you resold grapes (“yes” to Question 1b), enter the purchase information for these grapes into Section II (orange header) of the Data Page worksheet. This is the original purchase from grower information. Leave Section I (green header) blank for these resold grapes.

If you purchased grapes from growers and had them crushed by another processor (“yes” to Question 2), enter the purchase information for these grapes into Section II (orange header) of the Data Page worksheet. Leave Section I (green header) blank for these grapes, since you did not crush them.

Fill in Data Page Sections I and II for grapes you purchased from a grower and crushed at your facility. Pierce’s Disease Assessment calculations for these grapes are shown on the right side of the page (these columns are not shown in the EZ form).

Fill in Data Page Section I (green header) for grapes you grew AND crushed at your facility. Leave Section II (orange header) blank, since the grapes are not purchased.

For the MOG Form only: You also need to enter a “1” in the “Grown and Crushed by You” Excel column D for these grapes.

A purchase is considered **related** if the winery and grower share 5% or more common ownership OR have a long-term financing agreement. Otherwise, the purchase is considered **non-related**.

Examples of a **related** purchase:

- (1) Winery X is a cooperative owned by multiple growers. William owns Vineyard A. William also has 5% ownership of Winery X. If Winery X buys grapes from Vineyard A, this is a related purchase.
- (2) Winery Y is owned by James and Kelly. Kelly also owns 10% of Vineyard B. If Winery Y purchases grapes from Vineyard B, this is a related purchase.
- (3) Winery Y is owned by James and Kelly. James provided long-term financing to Vineyard C and has the right to buy grapes produced by Vineyard C. If Winery Y purchases grapes from Vineyard C, this is a related purchase.

On the Data Page – Section II, the tonnage for a **non-related** purchase is entered in **both** “Tons Purchased” column L and “Non-Related Purchased Tons” column M.

If the purchase is **related**, the tonnage is entered in the “Tons Purchased” column L and a **zero** is entered in “Non-Related Purchased Tons” column M.

			0.0		0.0	0.0	
GRAPE INFORMATION			SECTION I Grapes Crushed By You				
			Tons Crushed	Brix	Tons Purchased	Non-Related Purchased Tons Click for info!	Base Price Per Ton (Include local hauling)
#	Variety Click here for variety name list!	District Where Grown Click for map!					
4							
5							
6							

In summary:

#	Situation	Where to list these grapes in your Grape Crush Inquiry
1	Your winery grew and crushed grapes at your facility	Data Page - Grape Information Data Page - Section 1
2	Your winery grew and crushed grapes as an alternating proprietor (AP) at another facility	Data Page - Grape Information Data Page - Section 1
3	Your winery grew grapes and had them custom crushed	Question 2
4	Your winery purchased grapes and crushed them at your facility	Data Page - Grape Information Data Page - Section 1 Data Page - Section 2
5	Your winery purchased grapes and crushed them as an alternating proprietor (AP) at another facility	Data Page - Grape Information Data Page - Section 1 Data Page - Section 2
6	Your winery purchased grapes and had them custom crushed	Question 2 Data Page - Grape Information Data Page - Section 2
7	Your winery custom crushed grapes for an operation that only grows grapes (client does not purchase nor crush <i>any</i> grapes)	Question 4
8	Your winery custom crushed grapes for another winery (client purchases and/or crushes grapes)	Question 3
9	You re-purchased grapes (that is, you bought grapes from someone other than the original grower) and crushed them	Question 1c
10	You re-purchased grapes (that is, you bought grapes from someone other than the original grower) and had them custom crushed	Question 1c
11	You purchased grapes from a grower and then resold them	Question 1b Data Page - Grape Information Data Page - Section 1
12	You purchased juice (price per gallon)	Do not include these grapes in your report!

Section A (Omitted from the EZ Form)

The object of Section A is to help you determine if the Data Page is completed correctly. The yellow cells are calculated automatically based on Questions 1b, 1c, 2 (grown grapes only), 3, and 4. Look these over and verify that they are correct. If not, make updates to the appropriate worksheets.

Fill in the white cells as needed to balance and check your workbook totals. Note any error messages and correct the problem.

The Grand Total Line 10 values for Tons Crushed, All Purchased Tons, and Non-related Purchased Tons should equal the "Totals from Data Page for comparison," which are shown below in Excel rows 24 through 26. If they are not the same, make the appropriate updates.

If you are not able to get the workbook totals to match, please contact us for help at 916-738-6569 or GrapeCrushTeam@usda.gov.

Enter tons crushed for concentrate production in Excel row 21.

Assessment Totals

This worksheet is automatically filled in for you based on information entered in other worksheets. Review your assessment that is shown on this worksheet.

Go to the bottom of this worksheet and answer the question "Have you or will you receive any grapes for crushing after December 15?"

Varieties

This worksheet is a reference list of grape varieties that this workbook is set up to process. It shows the way we spell the varieties, the type of grape, and comments about alternate variety names.

Districts

Map of the California Grape Pricing Districts.

STEP 5 Double Check the Data for Common Errors

- Check that you have entered the requested information into the Introduction worksheet.
- Go back through each worksheet in this workbook and look for errors. Errors and omissions will be highlighted red.
- If grapes are purchased and crushed at another facility (Question 2), be sure to enter a '1' in the 'Was tonnage PURCHASED by you from growers(s)?' column of Question 2. Leaving this question blank will result in an overpayment of the Pierce's Disease Assessment for these grapes.
- Check that you have entered the purchase price of grapes purchased in **both columns 8 and 16** on the Data Page (Section II). The prices in column 16 are used to calculate the Pierce's Disease Assessment.

STEP 6 Submit Your Report

- Attach your completed Excel workbook file to an e-mail message and send it to either GrapeCrush@cdfa.ca.gov. Note that this is a different email address than where to send questions.
- Print the “Assessment Totals” tab from your excel workbook.
- Complete and sign the blue certification form.
- Write a check for the assessment owed (calculated on the Assessment Totals tab). Your check should be made out to “CDFA Grape Crush”. Please label your check with your winery name and/or ID number so we can identify what winery the payment is for.
- Mail the completed blue certification form, your printed Assessment Totals tab, and assessment check using the enclosed pre-paid envelope. If you do not wish to use the pre-paid envelope, please mail your paperwork to:

CDFA Grape Crush
650 Capitol Mall, Suite 6-100
Sacramento, CA 95814

- When we receive your finished workbook, we will send an e-mail to you within the week confirming receipt of your workbook. Full compliance is met when we receive your finished workbook, your blue certification form, your printed Assessment Totals page, and your assessment check.