



BATCHMASTER®
Process Manufacturing Software



A Requirements Checklist to Help You Evaluate **Nutraceutical ERP Systems**

Use this comprehensive checklist to make your ERP selection process more focused and effective.

Vendor Response Key

OOB = Out-of-the-Box

CUS = Available through customization

BOL = Bolt-on at additional cost

3RD = Available through integration with 3rd-party software

FUT = In development for future release

NA = Not available

ERP Requirements Checklist for Nutraceutical Manufacturers

Feature Requirement	Priority	Timeline	Vendor Response					
			OOB	CUS	BOL	3RD	FUT	NA
Industry-Specific Functionality								
» Formula and recipe management with version control								
» Batch manufacturing with lot tracking and traceability								
» Support for custom, private label, and white label production								
» Ability to manage multiple brands and product lines								
» Dynamic label claim alignment								
» Dosage form definition (tablets, powders, soft gels, etc.)								
» Lot potency / lot strength tracking to manage variability in actives or herbal ingredients								
» Product development and sampling support, including R&D formulation and lab trial management								
Regulatory Compliance								
» FDA 21 CFR Part 11 & FSMA compliance								
» cGMP (current Good Manufacturing Practice) support								
» Electronic signatures and audit trails								
» Certificate of Analysis (CoA), BMR & MBR generation								
» Allergen, ingredient, and nutrition labeling support								
» Supplement Facts reporting for FDA-compliant panel generation, especially for private label products								
» Stability testing protocol support, including real-time and accelerated stability studies for shelf-life validation								

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Inventory & Supply Chain Management								
» Real-time inventory visibility (raw, WIP, finished goods)								
» Multi-warehouse and multi-location support								
» Automated purchasing and reorder points								
» Lot traceability across vendors and ingredients								
» Expiration date tracking and FIFO/FEFO logic								
• Automatic expiration date generation during production based on shelf-life rules								
• Blocking of expired inventory from production or sales use								
• Alerts for near-expiry inventory, with QA/quarantine integration								
» Full GMP validation support								
» Tracking of customer-supplied raw materials or packaging								
» Visibility into subcontracted manufacturing steps, including quality oversight for outsourced stages								
Production Planning & Scheduling								
» Campaign, super-batch, and sub-batch production support								
» Master production scheduling (MPS)								
» Material requirements planning (MRP)								
» Batch size scaling and optimization								
» Flexible batch sizing and ad-hoc material substitution, with approval workflows and traceability								
» Capacity planning and shop floor scheduling								
» Support for make-to-stock and make-to-order								
» Pre-weighing, staging, and digital scale integration, including electronic weighing sheets								

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Quality Control & Assurance								
» In-process and post-production QC checkpoints								
» Non-conformance and deviation tracking								
● Deviation capture directly within the Batch Manufacturing Record (BMR) with audit trail								
» Quarantine and hold functionality								
» Lab testing integration								
» Audit-ready quality logs								
» Quality Assurance (QA) support for managing item-specific acceptance criteria before release								
Sales, Customer & Order Management								
» Customer-specific pricing and packaging								
» Multi-channel order management (eCommerce, B2B, B2C)								
» CRM integration for customer history and service								
» Order tracking and returns management								
» Tools for private/white label branding								



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Financial Management								
» Batch and job costing								
» Profitability by product, customer, or channel								
» Integrated AP/AR, GL, and financial reporting								
» Multi-currency and tax support								
» Audit-ready financials								
Business Intelligence & Reporting								
» KPI dashboards and executive summaries								
» Custom reports for production, QC, inventory, and sales								
» Demand forecasting and planning tools								
» Alerts and exception reporting								
Technology & Integration								
» Cloud, on-premise, or hybrid deployment options								
» Mobile access for production and warehouse teams								
» Integration with e-commerce, CRM, and accounting tools								
» Role-based security and user permissions								
» Scalable platform for growth								
» Electronic Batch Ticket (EBT) support for paperless batch execution and approvals								



Tip: Prioritize the items most critical to your processes, then use this checklist to compare ERP vendors side by side.