



## 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

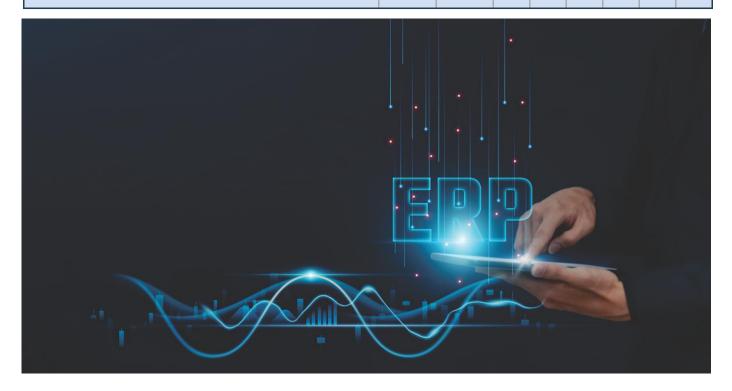
ERP Requirements Checklist for Nutraceutical Manufacturers									
Feature Requirement	Priority Time	Timeline	Vendor Response						
			ООВ	CUS	BOL	3RD	FUT	NA	
Industry-Specific Functionality									
Formula and recipe management with version control									
» Batch manufacturing with lot tracking 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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·			OOB	CUS	BOL	3RD	FUT	NA		
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										
<ul> <li>Automatic expiration date generation during production based on shelf-life rules</li> </ul>										
<ul> <li>Blocking of expired inventory from production or sales use</li> </ul>										
<ul> <li>Alerts for near-expiry inventory, with QA/quarantine integration</li> </ul>										
>> 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									
<ul> <li>Deviation capture directly within the Batch Manufacturing Record (BMR) with audit trail</li> </ul>									
>> 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			ООВ	CUS	BOL	3RD	FUT	NA		
» 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										
Selectronic 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.

