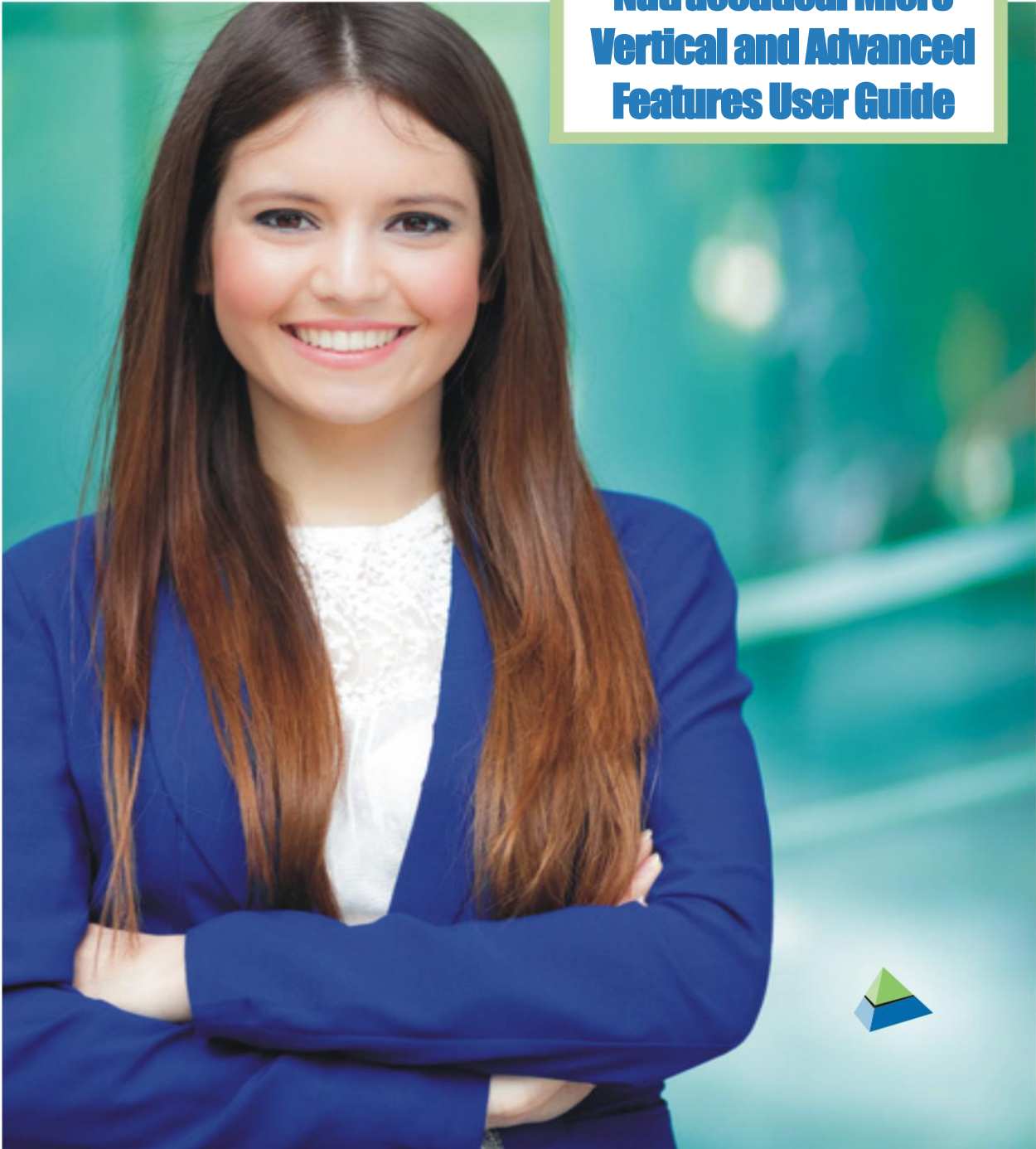


BATCHMASTER® ERP

18.2

BatchMaster ERP with SAP Business One
BatchMaster Solutions
for Process Manufacturers

Nutraceutical Micro Vertical and Advanced Features User Guide





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About the Manual

Symbols & Conventions

Symbol	Description
	Note
	Mandatory setting
	Tips

Convention	Description
Italicized (Sales Order Entry)	Module name, screen name & components
“ ” (“BatchMaster-ERP-with-SAP-Business-One-18.2-Nutraceutical Micro vertical-Features-Installation-Guide.docx”)	Reference document

Abbreviation	Description
QC	Quality Control
QA	Quality Assurance
GRPO	Goods receipt purchase order
FG	Finished Goods
BOM	Bill of Materials
ERP	Enterprise Resource Planning
PO	Purchase Order
UOM	Unit of Measurement
SO	Sales Order
Whse	Warehouse
NC	Non-Conformance
CAPA	Causes and preventive actions



Contents

1	Document Overview	1
1.1	Who Should Read This Document?	1
1.2	What's New in this Release?.....	1
1.3	Objectives	2
1.4	Getting Started	2
2	Deviations	3
2.1	Deviation Sub Types.....	4
2.2	Deviation Management	5
2.3	Batch Ticket	7
2.4	Approval Procedure	8
3	Downtime Management	11
3.1	Downtime Category	11
3.2	Downtime Code	12
3.3	Down Time Entry	13
3.4	Downtime By Batch	14
3.5	Down Time Dashboard	15
4	QC (Inspection Plan) Masters	16
4.1	Inspection Plan	16
4.2	Define Inspection Plan	17
4.3	Inspection Transaction.....	18
4.4	QC (Checklist) Masters.....	24
4.5	Check List Group	25
4.6	Define Checklist Group	26
4.7	QC Transaction Check List.....	27
4.8	QC Test Description	30
4.9	Inspection Transaction Dashboard	31
5	NC/CAPA	34
5.1	QC Defaults	34
5.2	Series Master	34
5.3	Non Conformance.....	37
5.3.1	<i>Root Cause</i>	<i>38</i>
5.3.2	<i>NC (Non Conformance)</i>	<i>38</i>
5.3.3	<i>Nonconformance Report.....</i>	<i>43</i>
5.4	CAPA Overview	44
5.4.1	<i>CAPA Types.....</i>	<i>44</i>
5.4.2	<i>CAPA Categories.....</i>	<i>46</i>
5.4.3	<i>CAPA Reason</i>	<i>47</i>
5.4.4	<i>CAPA.....</i>	<i>48</i>
5.4.5	<i>CAPA Report.....</i>	<i>55</i>



6	Stability Testing	56
6.1	QC Defaults	56
6.2	Stability Test Plan	57
6.3	Item Master Detail Modifications	58
6.4	QC Dashboard	59
6.5	Quality Control Order – QC	60
7	Advanced Stability Testing	61
7.1	QC Defaults	61
7.2	Advance Stability Plan	63
7.3	Navigation Control of Advance Stability Plan	65
7.4	Item Master Detail Modifications	66
7.5	Advance Stability Dashboard	67
7.6	Quality Control Order – QC	68
8	Advanced Boilerplate	69
8.1	Formula Defaults	69
8.2	Manufacturing Instructions	70
	8.2.1 <i>Defining different types of Advance Boilerplate</i>	72
9	Business Partners	76
9.1	Business Partner Master Data	77
9.2	Business Partner Catalog Number-Draft	79
10	Sampling Management	81
10.1	Sampling Setup	81
10.2	Sales Request Management	81
10.3	Product Development	83
	10.3.1 <i>Product Development Dashboard</i>	98
10.4	Quality Control Samples	100
11	Purchase Price Approval Dashboard	112
11.1	Buying from an Approved Vendor	114
12	Third Party Manufacturing	115
12.1	Set-up Steps: Defaults	115
	12.1.1 <i>Business Partner Setup</i>	117
	12.1.1.1 <i>Special Prices For Business Partner</i>	117
	12.1.1.2 <i>Period Discounts</i>	118
	12.1.2 <i>Define Contractor Warehouse</i>	120
	12.1.3 <i>Define Outside-Processing Cell</i>	120
	12.1.4 <i>Define Outside Processing Formula</i>	121
	12.1.5 <i>Define Outside-Processing Bill of Materials</i>	122
12.2	Create Outside-Processing Batch	124
12.3	View/Edit Service Purchase Order	125
12.4	View/Edit Inventory Transfer Request	126
	12.4.1 <i>Select Material Lot Numbers to Transfer</i>	127
12.5	Create Goods Receipt PO	129



12.5.1 Receive Finished Item Lots	130
12.6 Configuring and Mapping Service Charges in Third-Party Processing	130
12.7 Possible Scenarios for Service Charge Configuration in Third Party	131
12.7.1 Mapping labor cost as service charge in third party	131
12.8 Third Party Dashboard	138
12.9 Material Issue to Outside-Processing Batch	139
12.10 Batch Closed – Goods in Inventory	140
13 Adverse Event Reporting	141
13.1 Complaint Type	141
13.2 Complaint Severity Type	143
13.3 Complaint Source	144
13.4 Complaint Entry	145
13.5 Complaint View Dashboard	149
13.6 Sales Delivery Screen	150
14 Nutra/Pharma-Specific Features	151
14.1 Overview: Physical Property Analysis	151
14.2 Product Type Master	152
14.3 Soft Gel Type Master	153
14.4 Capsule Size Master	154
14.4.1 Laboratory Defaults	155
14.5 Tablet Shape Master	156
14.6 Tablet Size Master	157
14.7 Appearance Color Master	158
14.8 Ribbon Thickness Master	159
14.9 Physical Property Analysis Details	160
14.9.1 Soft Gelatin Capsules	162
14.9.2 Capsules	164
14.9.3 Tablets	165
14.9.4 Supplement Fact Sheet	167
15 Supplement Fact Sheet	169
15.1 Key Terms	169
15.2 Profile Master	170
15.2.1 Maintaining the Profile Master	171
15.3 Material Property Master	172
15.4 Formula Defaults	173
15.5 Printing Supplement Fact Sheet	173
15.5.1 Understanding the Supplement Fact sheet with an example.	178
15.5.1.1 Calculations	189
16 Batch Manufacturing Record	196
16.1 Manufacturing Process (Boilerplate) Entry	197
16.2 Product Type/Item Mfg. Process	198
16.3 Script Master	199
16.4 Print BMR Setup	201



16.5	Print BMR.....	203
17	Advance Batch Manufacturing Record	203
17.1	Formula Defaults	204
17.2	Approval Template	205
17.3	Product Category	206
17.4	Print BMR Setup.....	207
	17.4.1.1 Setting the Print BMR Setup	208
17.5	Print BMR.....	211
18	Batch Information Report.....	212
19	GLOSSARY	218

1 Document Overview

BatchMaster ERP for SAP Business One (BatchMaster ERP) can provide special functions to cater to the needs of the nutraceutical and pharmaceutical industries. It is also applicable for other formula-based manufacturers who need to bring their production processes in line with the guidelines set by the Food & Drug Administration (FDA).

BatchMaster offers separate licensing packs for Nutraceutical Micro vertical and Advanced Features. For process manufacturers who only require the capabilities of:

- *Advanced Production*, (Sections 2, 3, 4, 10, 11, and 14)
- *Advanced Quality Control*, (Sections 2, 4, 5, 6, 7, and 11) and/or
- *Sampling*, (Section 8,9),

the Advanced Features License is sufficient.

If your business requires any of the following in addition to the above features:

- *Define Soft-Gel types*
- *Define Capsule sizes*
- *Define Tablet shapes and sizes*
- *Define Appearance colors*
- *Define Ribbon thickness*

The Nutraceutical Micro Vertical license is required. These functions are discussed in Section 12 & 13.

1.1 Who Should Read This Document?

This document is intended for anyone who is implementing the software, learning how to use it, or training another person.

1.2 What's New in this Release?

Configuring and Mapping Service Charges in Third-Party Processing.

1.3 Objectives

This document is intended to help the reader:

- Identify the industry-specific utility of each feature.
- Record data in the system to perform transactions.
- Explain the purpose of features to others using examples.
- Identify the business uses.
- Identify the purpose and functioning of the features in BatchMaster ERP Mobile.

1.4 Getting Started

Before you begin using the Nutraceutical Micro Vertical or Advanced Features you should understand how the Laboratory, Formulation, and Quality Control modules work. Please read the corresponding user manuals for information.

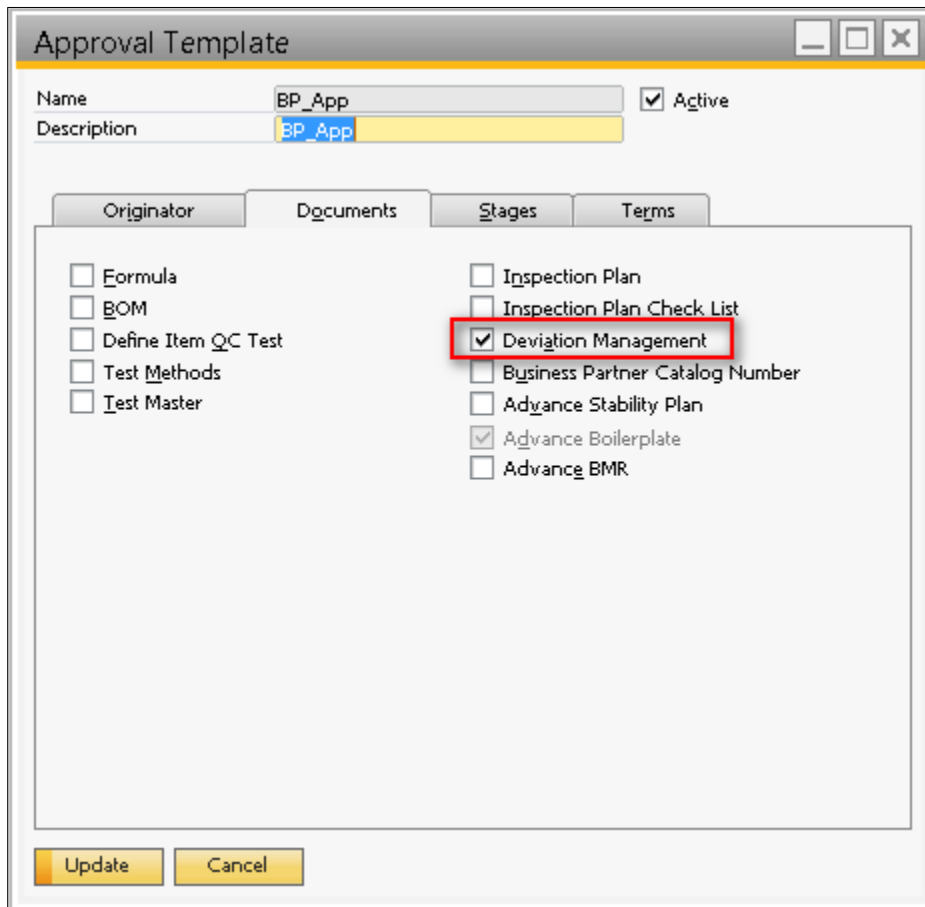
2 Deviations

You may need to make changes in a batch for many reasons. In such cases, you can put the batch on hold and apply a deviation. Example reasons are a change in the quantity of raw material or change in the proportion of the formula. Let us learn how we can manage deviations in BatchMaster ERP.

Before creating a deviation record, you need to apply the approval procedure for *Deviation Management* on the *Approval Template* screen.

Go To: Administration → Approval Procedures → Process Mfg. Approval Procedures → Approval Template

In the *Approval Template* screen, on the *Documents* tab, select the *Deviation Management* checkbox.



The screenshot shows the 'Approval Template' window. At the top, there are fields for 'Name' (BP_App) and 'Description' (BP_App), along with an 'Active' checkbox. Below these are four tabs: 'Originator', 'Documents', 'Stages', and 'Terms'. The 'Documents' tab is selected, displaying a list of checkboxes for various document types. The 'Deviation Management' checkbox is checked and highlighted with a red rectangle. Other checkboxes include 'Formula', 'BOM', 'Define Item QC Test', 'Test Methods', 'Test Master', 'Inspection Plan', 'Inspection Plan Check List', 'Business Partner Catalog Number', 'Advance Stability Plan', 'Advance Boilerplate', and 'Advance BMR'. At the bottom of the window are 'Update' and 'Cancel' buttons.

For details on Approvals set-up and the purpose of the other tabs, consult the *BME-B1 18.2 Approvals User Guide*.

2.2 Deviation Management

You can create a deviation record using the *Deviation Management* screen.

Go To: Process Manufacturing → Deviation Management

The screenshot shows the 'Deviation Management' window with the following data:

Deviation No.	2	Status	New	<input checked="" type="checkbox"/> Hold Batch
Batch No	B0012	Completion Date	10/18/16	
Type	Planned	Notes	Need urgent approval	
Sub Type	PD1	Investigation/Root cause	Product did not meet specifications	
Requested By	manager	Disposition		
Deviation Date	10/18/16	NC		
Assigned To	amita	CAPA		
Reason	Material Substitution Required			
Deviation Detail	Needs to substitute Omega 3 in place of Lecithin summer			
Impact	To improve Product Quality			

The screen opens with the status “New”. Search and select the batch on which you want to apply deviations. The drop-down menu in the *Batch No* field will list all batches except those with the status *New* or *Closed*. Select the *Hold Batch* checkbox to put the batch on hold while you are making changes. In the *Completion Date* field, enter the date on which you expect to complete the deviations.

On the *General* tab, select the appropriate deviation type from the options *Planned*, *Unplanned*, *Critical* and *Employee Suggested*. Then choose the sub-type from the list defined earlier. Select the user who requested for the deviation and the date of request, in the *Requested By* and *Deviation Date* fields respectively. In the *Assigned To* field, enter the person to whom the deviation task has been assigned.

On the *General* tab, you can add all relevant details about the deviation. Especially important are the root cause of the deviation and the method of disposition. In addition, if the deviation is associated with a non-conformance, you can enter the NC record number and also the CAPA number.

On the *Attachments* tab, you can browse and locate the file(s) that you want to attach with this deviation management record. This file could be any document that can be of use to the approver. It must be located on a shared server.

The screenshot shows a window titled "Deviation Management" with a yellow header bar. At the top, there are input fields for "Deviation No.", "Batch No" (containing "batch-020"), "Status" (set to "New"), and "Completion Date" (set to "14/11/18"). A "Hold Batch" checkbox is checked. Below these fields are two tabs: "General" and "Attachments", with "Attachments" currently selected. The "Attachments" tab contains a table with the following columns: "#", "Source Path", "Target Path", "File Name", and "Attachme...". The first row contains the values "1", "\\Eworkplace\temp", an empty field, "net.pdf", and "14/11/18". To the right of the table are three buttons: "Browse", "Display", and "Delete". At the bottom of the window are two buttons: "Add" and "Cancel".

#	Source Path	Target Path	File Name	Attachme...
1	\\Eworkplace\temp		net.pdf	14/11/18

Click the *Add* button to save the record.

2.3 Batch Ticket

In addition, you can view the deviations applied on a batch from the *Batch Ticket* screen. When you click the *Deviations* button on the screen, the *Deviation Details* screen appears.

The screenshot shows the SAP Batch Ticket screen with the Deviation Details dialog box open. The Batch Ticket screen displays the following data:

Batch Number	B0012	Production Whse	01
Type	Mix	Demand Type	Independent
Status	Released	Sales Order	
Formula ID	Turmeric Capsule	Customer Key	
Revision	000000001	Last Issue/Alloc Date	
Warehouse			
Owner	manager		

The Deviation Details dialog box shows the following table:

Deviation No.	Deviation Date	Requested By	Reason	Status	Assigned To
2	10/18/16	manager	Material Substitution Required	New	amita

On the Batch Ticket or Batch Close screen you can also attach the deviation record with the formula item (in the formula grid) or BOM item (in the finished good packaging item grid).

2.4 Approval Procedure

When you save a deviation management record, the *Send for Approval* button is enabled. Click this button to view the *Request for Approval* screen. On this screen, you can select the approval template that you wish to follow for the approval of the deviation.

Approval

Generating this document requires the authorization of other users. In the table below type remarks that are relevant for the authorizer and click OK.

#	Approval Template	Remarks
➔	AT01	RM is FDA Approved

OK Cancel

The status of the deviation record changes to *Pending* and the status of the batch changes to *Hold*.

Deviation Management

Deviation No. 2 Status Pending Hold Batch
Batch No. ➔ B0012 Completion Date 10/18/16

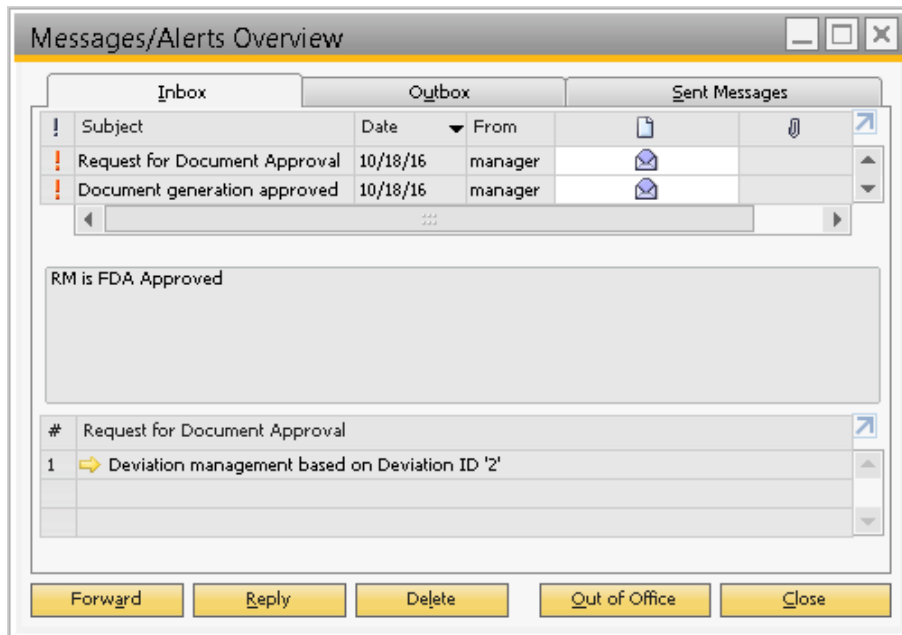
General Attachments

Type Planned
Sub Type ➔ PD1
Requested By manager
Deviation Date 10/18/16
Assigned To amita
Reason Material Substitution Required
Deviation Detail Needs to substitute Omega 3 in place of Lecithin summer
Impact To improve Product Quality

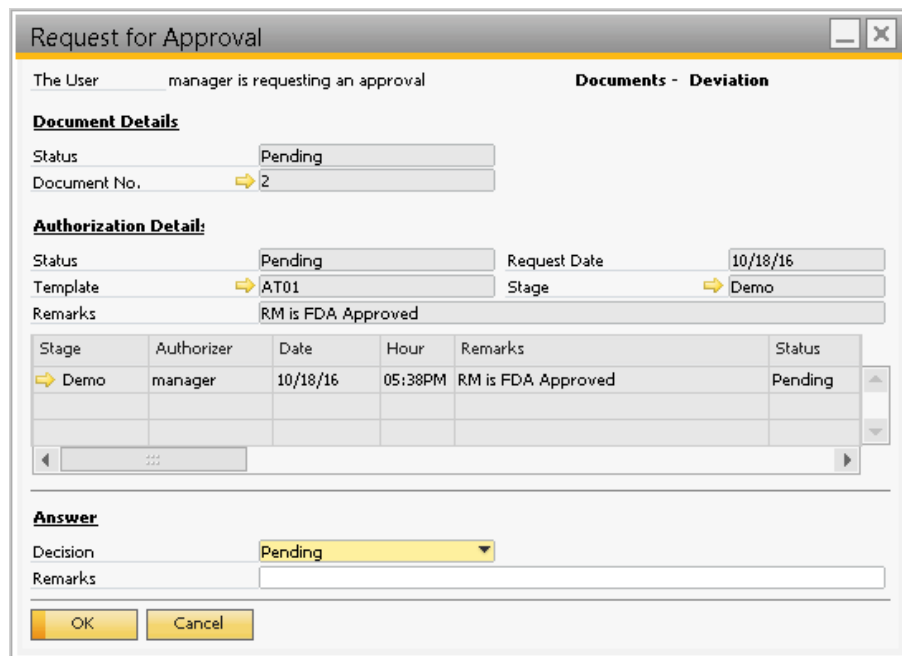
Notes Need urgent approval
Investigation/Root cause Product did not meet specifications
Disposition
NC
CAPA

OK Cancel Send for Approval

The first approver receives the message alert, requesting his approval. He/she can open the screen using the hyperlink/golden arrow, go through the deviation, and approve it.



The first approver clicks on the golden arrow, and the *Request for Approval* screen appears.

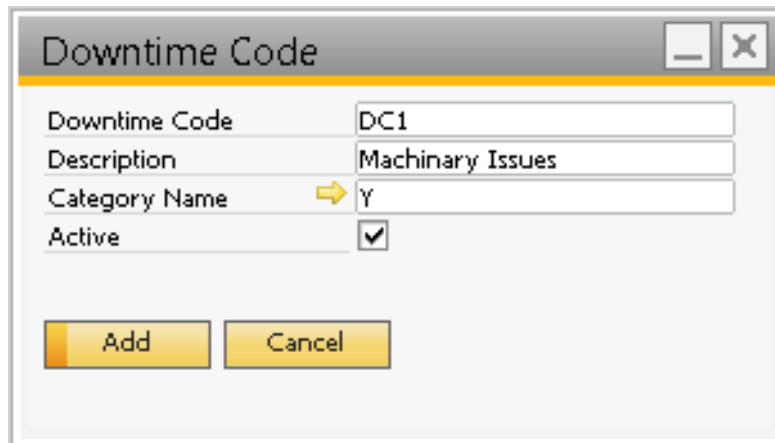


The approver checks and approves or rejects the deviation. The approver can also leave it in *Pending* state. If the approver approves/rejects the deviation, then it passes on to the next approver. The status of the deviation on the *Deviation Management* screen changes to *Approved or Rejected* state, as per the decision taken by the approvers.

3.2 Downtime Code

You can create downtime codes using the *Downtime Code* screen. These codes can then be associated with production batches.

Go To: Administration → Setup → Production → Downtime Code



The screenshot shows a window titled "Downtime Code" with the following fields and values:

Downtime Code	DC1
Description	Machinery Issues
Category Name	Y
Active	<input checked="" type="checkbox"/>

At the bottom of the window are two buttons: "Add" and "Cancel".

On the *Down Time Code* field, enter the unique identification code, say DC1. Then enter a description of the *Downtime Code* in the *Description* field, say Machinery Issues. Next, select the *Category Name* using the lookup available next to *Category Name* field. Activate the code by checking the *Active* option. Lastly, click the *Add* button to save the record.

3.3 Down Time Entry

You can use the *Down Time Entry* screen to enter downtime reasons for a production batch.

Go To: Process Manufacturing → Down Time Entry

The downtimes created here can be viewed on the *Downtime By Batch* screen. This screen also appears by clicking the *Add DownTime* button on the *Downtime By Batch* screen.

Transaction ID	2	
Batch No.	B0012	
Process Cell		
Process Step	0	
Downtime Code	DC1	
Downtime Desc	Machinery Issues	
Remarks	urgent to resolve	
Start Date	10/18/16	09:00
End Date	10/18/16	10:00

OK Cancel

Search and select the batch number. The system will list all the batches except New and Closed batches. The process cell will be auto-filled by the system. The Process ID associated with the batch will be displayed in the Process Step field. Next, search and select the *DownTime Code* that you want to apply for the batch.

You can also enter remarks about the downtime, which could be of some importance to the reader. Enter the start and end data for the down time. Click the *Add* button to save the record. Note: You can create multiple downtime records for a batch.

3.4 Downtime By Batch

After creating master records for downtime, you can associate the downtime codes with production batches. Once you apply a downtime for a batch, you will be able to analyze the progress of the batch. You can apply multiple downtimes for a batch, if need be.

Go To: Process Manufacturing → Downtime By Batch

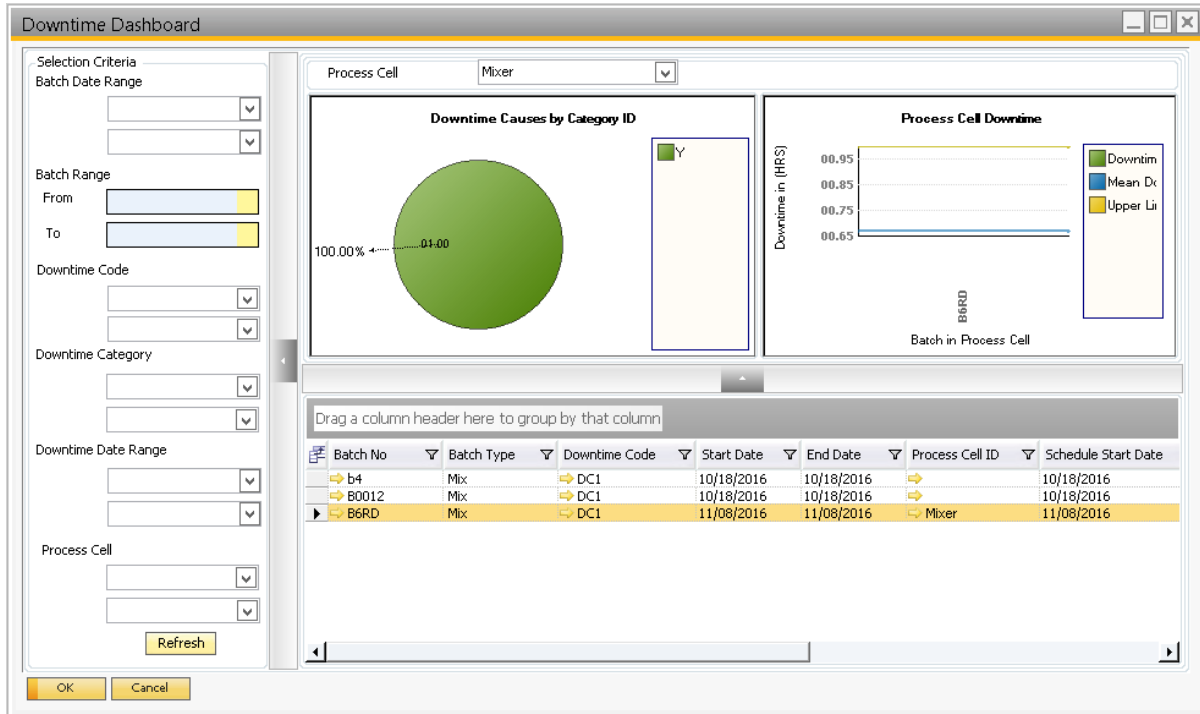
#	Batch No	Process Step	Transaction ID	Downtime Code	Downtime Desc	R.
1	B0012	0	2	DC1	Machinery Issues	urg

Enter the batch number in the *Batch No.* field. The *Process Cell* field gets auto-populated based on the batch. The read-only grid displays all the downtimes already applied for the batch. If you wish to add more downtimes, click the *Add Downtime* button. Once you click this button, the *Down Time Entry* screen opens.

3.5 Down Time Dashboard

Using the Downtime Dashboard, you can analyze the efficiency of production batches for which you have applied downtimes. This dashboard makes your analysis easier by providing information in a graphical screen using pie-charts and line graphs. Both the graphics use identical color codes, which help you easily analyze the reasons for production line delays.

Go To: Process Manufacturing → Production Utilities → Down Time Dashboard



The Downtime Dashboard provides you several filter criteria, namely: batch date, batch number, down time code, down time category, down time date, and process cell. For each of these criteria, you need to enter the lower and upper limit of a range of values. Those data that fall within the specified range of filter criteria will be displayed on the dashboard.

Click the *Refresh* button to view the desired data on the dashboard and thereby analyze the efficiency and progress of the batch.

4 QC (Inspection Plan) Masters

Every inspection that you undertake is recorded as a transaction. To perform an inspection transaction, you need to create records in the QC masters discussed below.

To comply with FDA specifications, the sampling plans should provide criteria and decision rules for determining whether to accept or reject a batch based on the sample quality. In BatchMaster ERP, you can choose the samples based on your requirements, both by quantity and container.

4.1 Inspection Plan

FDA cGMP requires that every nutraceutical manufacturer records various activities involved during production such as Temperature, Moisture, and pH value. Thus, a well-defined inspection plan should include all aspects required to judge whether a product is in compliance with applicable standards. You can define quality inspection plans for raw materials and finished goods using the Inspection Plan screen.

Go To: Quality Control → Inspection Plan

Every row of the grid displays detailed information about each QC test. Such information includes test evaluation criteria, number of times the test is being conducted, and the upper and lower limit of acceptable test values if the test is of numeric type.

Based on your business needs you can add multiple QC tests to the inspection plan.

The screenshot shows the 'Inspection Plan' window. At the top, there are input fields for 'Inspection Plan' (ISP001) and 'Description' (ISP001). Below these is a table with the following data:

#	Test Code	Description	Measuring	No. of Readings	Alphanumeric...	Nominal ...
1	QC001	Test for the viscosity of the mixture	Numeric	3		0.
2	QC002	Color test for the product	Alpha Numeric	0	Pass	

At the bottom of the window, there are 'OK' and 'Cancel' buttons.

4.3 Inspection Transaction

Carrying out inspections on your released batches, sales delivery, purchase receipt or any other process is a concern to meet compliance. Using the *Inspection Transaction* screen, you can perform inspections on your purchase receipt, sales orders and production orders.

Go To: Quality Control → Inspection Transaction

#	Inspection Plan	Description	User ID
1	ISP001	ISP001	manager

#	Color Test	Date	Time	Comment	Lot Number
1					

You can also add an *Inspection Transaction* record from Batch Entry, Batch Ticket, Batch Close, Super Batch Entry and Super Batch Close Screen. The *Add Inspection Transaction* option is provided on the right click of the screen.

On the *Inspection Transaction* screen, first you need to enter the document type on which the inspection plan will be employed, and then you need to enter the desired document number. Based on the document number you've chosen, you can view the applicable inspection plans in the upper grid and the quality control tests corresponding to each plan in the lower grid. You can click the *Add Line* button and enter test results for all the quality control tests.

Inspection Transaction

Applied Doc Type: Production Status: New
 Inspection Tran. ID: 9 Document No.: ST002-FG1
 Other Trans. Code: Document Date: 04/11/22
 Item Code: F_Strw_Juice Whse Code: 01
 Item Name: F_Strw_Juice Whse Name: General Warehouse

Inspection Plan

#	Inspection Plan	Description	User ID
1	ISP001	ISP001	manager

Submit Remarks View NC View Graph Add Line

#	Color Test	Date	Time	Comment	Lot Number
1	Pass			passed	LOT001

OK Close This Transaction

Once you are ready with the test results of all the quality control tests, you can click the *Submit* button to submit tests results for approval. At this stage, if you have implemented approvals for inspection transactions, the status changes to *Submitted* and an alert would be sent to authorize verifier for its verification. Also, you can enter Test – wise remarks with the Inspection plan. Clicking the *Remarks* button displays a remark window where you can enter the required remarks.

When an authorized verifier logs in, the *Verify* button is activated.

The screenshot shows the 'Inspection Transaction' window with the following data:

Applied Doc Type	Production	Status	Submitted
Inspection Tran. ID	9	Document No.	ST002-FG1
Other Trans. Code		Document Date	04/11/22
Item Code	F_Strw_Juice	Whse Code	01
Item Name	F_Strw_Juice	Whse Name	General Warehouse

Inspection Plan

#	Inspection Plan	Description
1	ISP001	ISP001

Buttons: Submit, **Verify**, Approve, Remarks, View NC, View Graph, Add Line

#	Color Test	UserID	Time	Date	Comment	Lot Number
1	Pass	manager	16:59:55	20221104	passed	LOT001

Buttons: OK, Close This Transaction

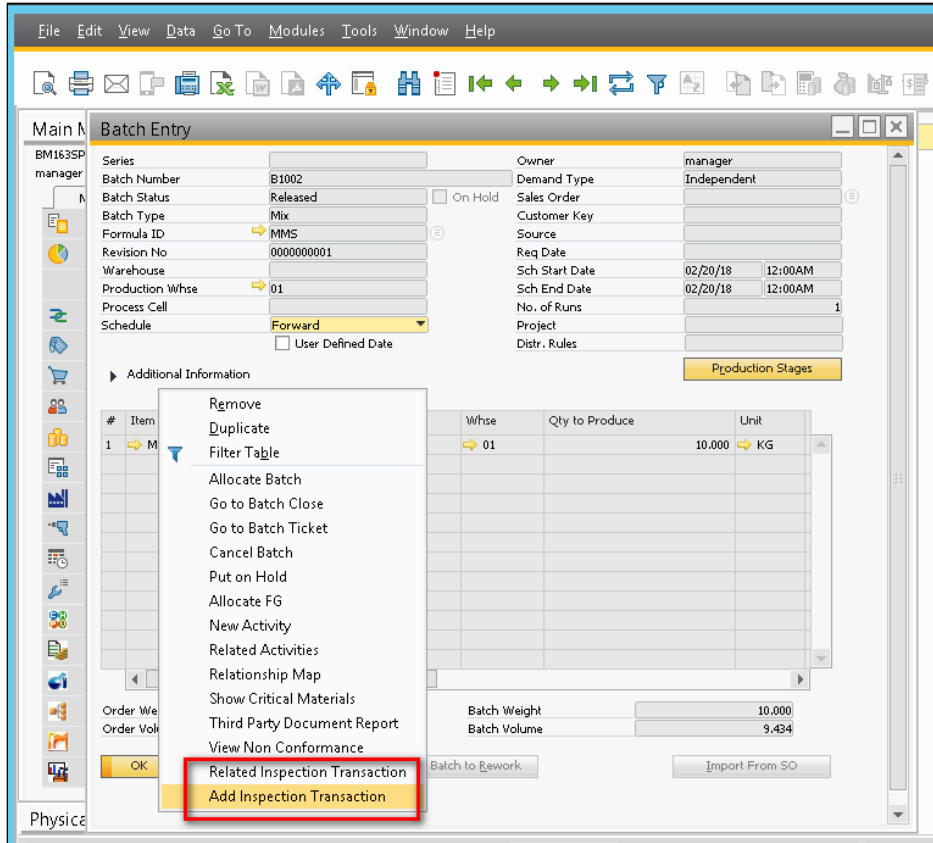
When verified, the record status changed to *Verified* and an alert would be sent to the approver for its final approval. Upon clicking the APPROVE button, transaction status changes to *Approved*.

The screenshot shows the 'Inspection Transaction' window. The 'Status' field is highlighted with a red box and contains the value 'Approved'. Other fields include 'Applied Doc Type' (Production), 'Inspection Tran. ID' (9), 'Document No.' (S1002-FG1), 'Document Date' (04/11/22), 'Whse Code' (01), and 'Whse Name' (General Warehouse). The 'Inspection Plan' table has one row: # 1, ISP001, ISP001. The 'Color Test' table has one row: # 1, Pass, manager, 16:59:55, 20221104, passed, LOT001. The 'Verified By' and 'Approved By' fields both contain 'manager', and the 'Verified Date' and 'Approved Date' fields both contain '04/11/22'. Buttons for 'Submit', 'Verify', 'Approve', 'Remarks', 'View NC', 'View Graph', 'Add Line', 'OK', and 'Close This Transaction' are visible.

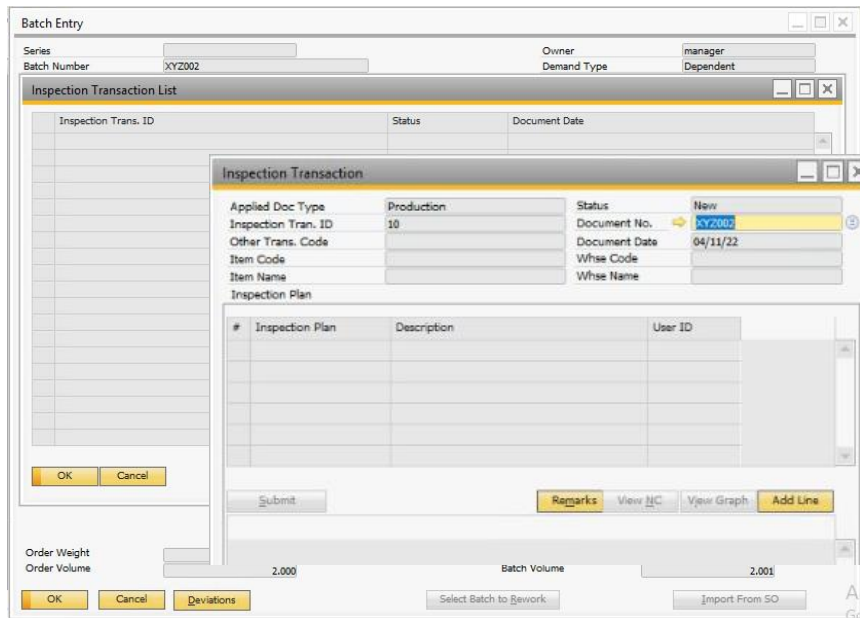
#	Inspection Plan	Description
1	ISP001	ISP001

#	Color Test	UserID	Time	Date	Comment	Lot Number
1	Pass	manager	16:59:55	20221104	passed	LOT001

The **View NC** button is available to view Nonconformance data, if it exists.



Clicking it displays the *Inspection Transaction* List.



4.4 QC (Checklist) Masters

Every inspection that you undertake is recorded as a transaction. To be able to perform an inspection transaction, you need to create records of all the essential details in the corresponding QC masters.

4.6 Define Checklist Group

Go To: Quality Control → Define Checklist Group

When your checklist groups have been defined, you can associate them with activities/documents such as Production, Receipt, Shipment or Others. You can define a Checklist group for a specific document, item group, product type or Item code. This ensures that the attached manufacturing instructions will be followed for each activity. To define a Checklist Group, open the *Define Checklist Group* screen from the Quality Control module.

#	Sequence No	Check List Group	Description
1	1	➔ CGRP1	CGRP1
2	2		

On the screen, select the desired document type from SO Delivery, PO Receipt, Production, Other and specify whether the checklist will be applied on a Specific Document, Item Group Wise, Product Type or Item Code.

In the grid, you can select as many check list groups as needed to attach to the selected document type.

4.7 QC Transaction Check List

GoTo: Quality Control → Transaction Check List

To ensure that a check list is followed during the desired activity, you need to associate it with your business process. You can do so using the *Transaction Check list* screen. On this screen, you can attach a checklist to a business transaction such as purchase receipt, sales delivery, or production receipt (using the dropdown) and to a specific document (using the Document No. field).

Transaction Check List

Applied Doc Type: PO Receipt | Document No.: 2 | Status: New
Transaction ID: | Other Transaction Code: | Document Date: 10/19/16

Check List Group ID: ALL

#	Seq. No	Check List Group	Boilerplate ID	Description	Checked	Verified	Approved
1			BP01	Handle with care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2			BP02	Wear Safety glasses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Checked By: | Checked Date: | Verified By: | Verified Date: |
Approved By: | Approved Date: |

Buttons: Submit, Verify, Approve, OK

The *Document No* field lookup displays a list of document, as displayed below.

List of SO Delivery

Find: |

Document No.	ItemCode	WhsCode	Document No.	BP Code	BP N...
10-1	pine	01	10	Carry	Carry
10-2	sugar_balls	01	10	Carry	Carry
10-3	Chilled_water	01	10	Carry	Carry
10-4	Cherry14	01	10	Carry	Carry
10			10	Carry	Carry
11-1	07vLvs	01	11	Carry	Carry
11-2	07vMilk	01	11	Carry	Carry
11-3	07vSugar	01	11	Carry	Carry
11-4	07vTea	01	11	Carry	Carry

Buttons: Choose, Cancel

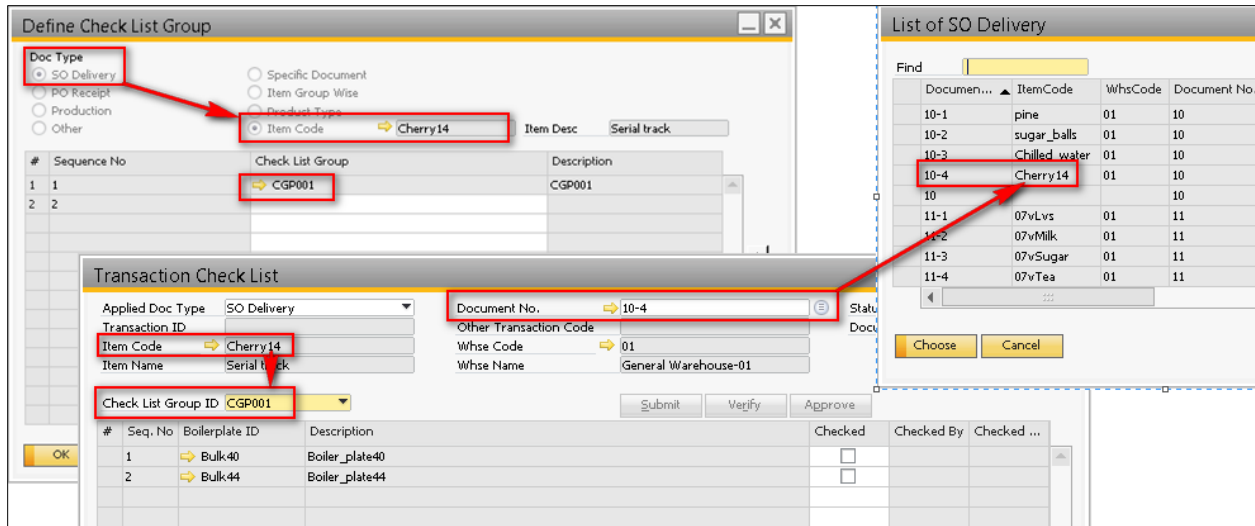
Here you can observe that the Document numbers are displayed in a format of 10, 10-1, 10-2, 10-3, 10-4. From the list, if you choose Document #10, the applicable checklist group will be the group you defined at document level.

The screenshot shows two windows. The 'Define Check List Group' window has 'SO Delivery' selected under 'Doc. Type'. Under 'Specific Document', 'Item Group Wise' is selected, and 'Check List Group' is set to 'CGRP1'. The 'Transaction Check List' window shows 'Applied Doc Type' as 'SO Delivery' and 'Document No.' as '10'. The 'Check List Group ID' dropdown is also set to 'CGRP1'. Below this, a table lists checklist items:

#	Seq. No	Boilerplate ID	Description
1	1	Bulk.103	Boiler_plate103
2	2	mix well	mix all the ingredients

If you select the document number as say 10-1 the system will pick the checklist group on the basis of the below order:

- Item Level
- Product Type Level (if Nutra is installed). This option is not visible for Advance Features
- Item Group Level
- Document Level



Once you have selected the desired document, all the checklists associated with it are displayed in the *Checklist Group Id* dropdown for selection. Applicable users will check/verify/approve the sequence of boilerplates.

4.9 Inspection Transaction Dashboard

Use the *Inspection Transaction Dashboard* to view the inspection details of SO Delivery, PO Receipt, Production and Other types of document. Dashboard offers distinct filter criteria to render quick and crisp information. Right from the dashboard you can perform various operations such as verify/approve/close the inspection document, View NC, and View Graph.

The screenshot shows the 'Inspection Transaction Dashboard' window. On the left, there are filter sections: 'Selection Criteria' (Doc Type: PO Receipt, Doc No From/To, Status: All), 'Document Date Criteria' (Show In Range: Last One Month, OR Doc Date From/To: 11/28/17), and 'Close Date Criteria' (Show In Range: Last One Month, OR Close Date From/To: 11/28/17). Below these are 'Save', 'Delete', 'Get Data', 'View NC', 'View Graph', and 'Do Operation' buttons. The main area has two tables. The top table has columns: Select, Inspection Tr..., Other Transa..., Document No., Document Date, Applied Doc..., Status, Verified By, Ve... The bottom table has columns: Inspection Code, Inspection De..., Submit Date, Submit Time, Verified By, Verified Date, Approved By, Approved Date, Re... At the bottom are 'Expand All' and 'Collapse All' buttons.

Selection Criteria

Doc Type: Specify the type of document based on which documents will be filtered and displayed on the dashboard. The options available are *SO Delivery*, *PO Receipt*, *Production*, *Other* and *All*

Doc No From: The lower limit of document numbers to be displayed, subject to the document type chosen above.

Doc No To: The upper limit of document numbers to be displayed, subject to the document type chosen above.

Status: Use this dropdown to select the status to filter the range of documents of particular status only. Available options are *New*, *Submitted*, *Verified*, *Approved*, *Closed* and *All*.

Document Date Criteria

Show in Range: Choose this option to view the inspection transactions closed in a specific timespan, last 3 days, last 7 days, last 1 month, last 6 months etc.

Doc Date From: Choose this option to specify a custom range of dates for which documents will be display.

Close Date Criteria

Show in Range: See above description.

Close Date From/To: Choose this option to specify a custom range of dates for which documents will be displayed.

Default/Add New: Use this dropdown to save the dashboard layout for future use. It can be the default layout or you can give it a unique name. Unique naming is useful when more than one user views the dashboard.

Save: Click on this button to save the layout.

Delete: Click on this button to delete the layout.

Get Data: Click on this button to display data on the dashboard based on your criteria.

View NC: Use this button to view the non-conformance list of the selected transaction.

View Graph: Use this button to get the graphical view of the selected transaction.

Do Operation: Use this dropdown to Verify/Approve/Close the selected inspection document.

Grid Details

Select: Use this checkbox to select corresponding line in the grid.

Inspection Transaction ID: Identification number of the inspection transaction.

Document No: Unique identifier of the document. You can use the available hyperlink to navigate directly to the document.

Document Date: Displays the date on which document is created.

Applied Doc Type: The type of document on which inspection transaction was accomplished.

Status: Shows the current status of the document.

Verified By, Verified Date, Approved By, Approved Date: Self-explanatory

Closed Date: Shows the date on which the document was/is finalized.

Closed By: Displays an id of the user who has closed the respective document.

Select All: Check this option to select all document lines displaying in the grid.

Show Pending Document for Approval: Select this checkbox to view all those documents whose approval is pending.

Show Pending Document for Verification: Check this option to view all documents whose verification is yet to be done.

User: Use this dropdown to select and filter data based on who is responsible for the inspection transaction.

Lower Grid

Displays the details of inspection plan applied on the document.

Inspection Code: The inspection plan applied on the document.

Inspection Description: Shows the name or description of the inspection plan.

Submit Date: Displays the date on which the document was submitted.

Submit Time: Shows the submission time of the document.

Verified By, Verified Date, Approved By, Approved Date: Self-explanatory.

RefLineID: System-maintained field.

Test Code: Shows the unique identifier of the QC test being applied on the document.

Value: Displays the QC test value.

Comment: Field displays note or remark added on the document.

Lot No: The lot on which inspection was performed.

5 NC/CAPA

5.1 QC Defaults

Specify the NC and CAPA Series to be used to generate the NC/CAPA document number.

QC Defaults

General Production QC Defaults - LotStatus Approval Navigation

Next Production QC Number PRO000190

Next Purchase QC Number PUR000027

Next Sales QC Number SAL000004

Next Inventory QC Number INV000019

Default warehouse for inventory transfer

Pass Warehouse → 01

Fail Warehouse → 02

Damage Warehouse → 03

Implement Stability Testing Advance Stability Test Plan

Next Stability QC Number SQ000001

Generate a New QC Order Per Lot

Offset Account for Samples → 115000000100101

NC Specification Template → Testh

CAPA Specification Template

NC Series → N1

CAPA Series → C1

OK Cancel

5.2 Series Master

Using the *Series Master* screen, you can define a prefix that can be added to the NC/CAPA document number. This prefix can be alphanumeric, a customer number, a date (a combination of month/day/year), or a numeric serial value. The series you set here will be used to generate the NC/CAPA document number sequentially after the prefix.

Go To: Administration → Setup → Quality Control Setup → Series Master.

On this screen, specify the unique series identifier in the *Series ID* field. Next, specify the series mask using the *Type* field in the grid. Available options are *Alphanumeric*, *Customer*, *Month (MM/MMM)*, *Series*, *Year (yy/yyyy)*, or *Day (dd/ddd/JD)*. Specify whether the *Series Type* of the series you are creating is CAPA or NC.

Series Master

Series ID: C001

#	Type	Value	Size
1	Alphanumeric	C	1
2	Year(yy/yyyy)	yy	2
3	Series	0001	4
4	Alphanumeric		0

Generate New Series Series Type: CAPA
 Every Month
 Every Year

Sample Value: C190001

Type: Choose one of the following options for each line of the grid. Based on the segment *Type* chosen on each line of the grid, enter the *Value* for the series mask. If you have selected:

- **Alphanumeric**, you must enter alphanumeric characters in the grid cell (maximum 19 characters).
- **Customer**, you will be prompted to enter the customer name at the time of batch close (maximum 15 characters).
- **Month (MM/MMM)**, select the month format from the drop-down box in the grid cell.
- **Year (yy/yyyy)**, choose the year format from the drop-down box in the grid cell.
- **Day (dd/ddd/JD)**, select the year format from the drop-down box in the grid cell. (Note: JD = Julian date.)
- **Series**, you must enter a starting numeric serial value in the grid cell. (Note: This entry must be the last row.)

Value: Enter the characters that make up the alphanumeric or the series. Month, day, and year formats are listed in parenthesis and are case-sensitive (i.e., the use of capital letters versus lowercase letters must be followed).

Size: Displays based on the entries made in the *Value* column. The cumulative size of all the grid rows cannot be more than 35 characters.

Generate New Series: Check this box to have the system change the month or the year automatically. Then pick *Month* or *Year* by clicking the appropriate radio button.



If you select *Generate New Series Every Month*, you must have *Month* as one of the numbering segments. *Generate New Series Every Year* requires *Year* as one of the numbering segments.

Series Type: Choose a relevant series type as one from the options, Non Conformance/CAPA. Further, you can use the respective series in the selected document type only.

#	Type	Value	Size
1	Alphanumeric	C	1
2	Year(yy/yyyy)	yy	2
3	Series	0001	4
4	Alphanumeric		

Generate New Series
 Every Month
 Every Year

Series Type: CAPA (selected), Non Conformance, CAPA

Sample Value: C190001

Buttons: Add, Cancel, Show Series

Sample Value: Displays the series sample value based upon the Type and Value you set.

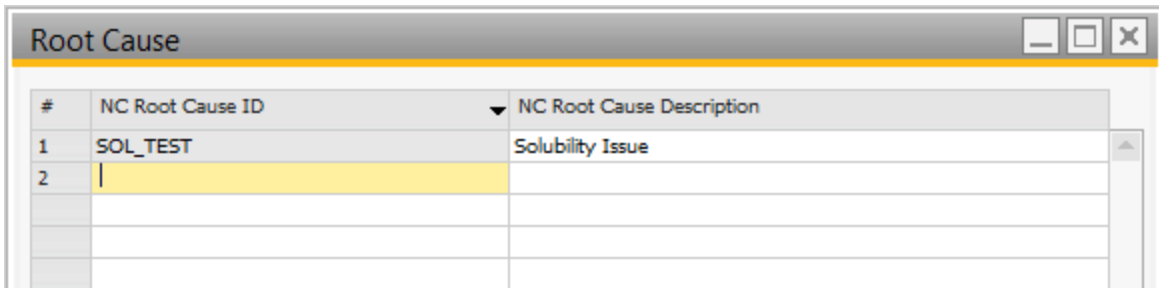
Add: Click the *Add* button to save your work.

Show Series: Use this button to view series already defined.

5.3.1 Root Cause

Every non-conformance occurs for some reason and needs to be identified and recorded. Using the Root Cause screen, you can store all possible causes of non-conformance. You can access this screen from the QC module.

Go To: Administration → Setup → Quality Control → Root Cause



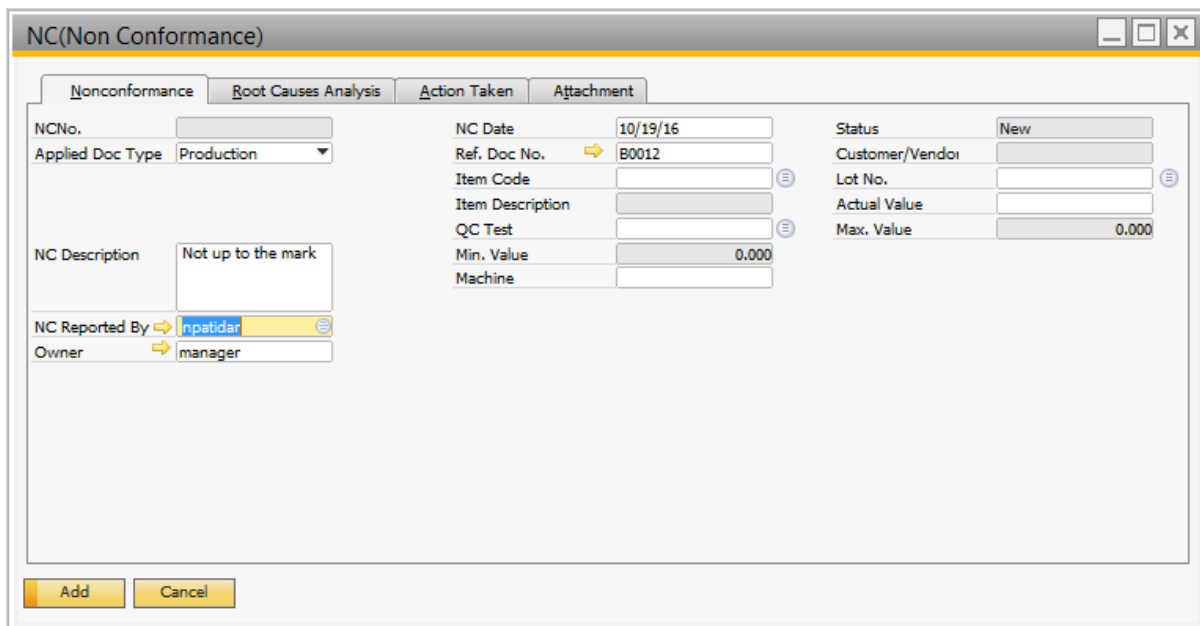
#	NC Root Cause ID	NC Root Cause Description
1	SOL_TEST	Solubility Issue
2		

In the *NC Root Cause ID* field, enter the unique identifier code for the root cause. Enter a brief description of the root cause, in the *Description* field. Click the *OK* button to save the record. You can create as many records as needed.

5.3.2 NC (Non Conformance)

Let's access the *NC (Non Conformance)* screen to record nonconformity manually.

Go To: Quality Control → NC (Non Conformance)



NC(Non Conformance)

Nonconformance | Root Causes Analysis | Action Taken | Attachment

NCNo.

Applied Doc Type: Production

NC Date: 10/19/16

Ref. Doc No.: B0012

Item Code:

Item Description:

QC Test:

Min. Value: 0.000

Machine:

Status: New

Customer/Vendor:

Lot No.:

Actual Value:

Max. Value: 0.000

NC Description: Not up to the mark

NC Reported By: npatidar

Owner: manager

Add Cancel

Begin with the *Nonconformance* tab. This tab holds general information about the non-conformance record.

In the *Applied Doc Type* field, enter the type of the document for which you are recording a non-conformance. The type can be SO Delivery, PO Receipt, Production, QC, Inspection or Other.

Next in the *NC Description* field, you can enter some details about the non-conformance. In the *NC Reported By* field, enter the user who reported non-conformance. In the *NC Date* field, enter the date on which the non-conformance was reported.

If you have any supporting document, then enter that document number in the *Ref Doc No* field. For example, if the non-conformance is associated with a particular production batch, then the batch number can be entered in this field.

In the *Item Code* field, enter the name of the product or item against which you are recording the non-conformance. In the *QC test* field, enter the quality control test as defined under the Inspection Plan applied to the item. In the *Lot No* field, enter the suspected lot's identification code.

Once you have identified and recorded the problem, you should record the underlying causes. You can do so on the *Root Cause Analysis* tab.

Switch to the *Root Cause Analysis* tab. Select the basic reason or “define as new” the root cause of the problem being raised. In the *Details* field, give a detailed description of the root cause.

The screenshot shows the 'NC(Non Conformance)' window with the 'Root Causes Analysis' tab selected. The 'Root Cause' field contains 'SO_Test'. The 'Details' field is highlighted in yellow and contains 'Solubility Issue'. Below this, there are fields for 'Analysed By', 'Analysed Date', and 'CAPA No.' with a 'Request CAPA' button. A table with columns '#', 'Group N...', 'Specification ID', 'Specification V...', 'Comments', 'Unit', 'Test Category', and 'Test Met...' is visible, with one row containing '1', 'Others', 'Template1', and 'Template1'. At the bottom, there is a checked 'Action Taken' checkbox and 'Update' and 'Cancel' buttons.

Since you have recorded an issue, you may now want to plan for its resolution.

In the *CAPA No.* field, enter the CAPA number if you have already requested a record for the nonconformity. If you want to request a new CAPA now, then click on the *Request CAPA* button. This will generate a CAPA request for the respective NC. Every CAPA request is identified by a unique code.

Check the *Action Taken* option once you have completed the root cause analysis process. On updating the record, its status changes to *Root Cause Analysis*.

Now move on to the *Action Taken* tab. Here, enter the activities that you have undertaken to prevent recurrence of the nonconformity. In the *User* field, enter the user who defined or applied these activities.

Select the *Action Taken* checkbox. If you have authorization to close the NC document then after finishing all the required activities, check the Action Taken checkbox and click on the Update button. On updating the record, the status changes to *Action Taken*.

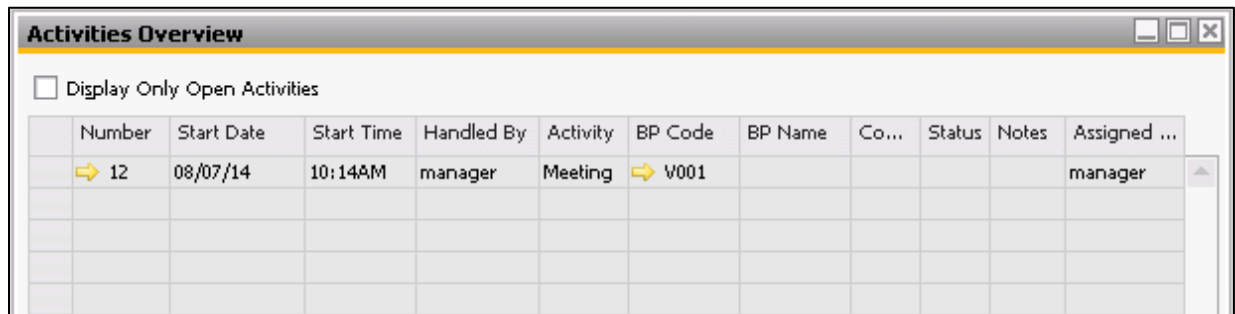


On the General Authorization screen, if user has not assigned authorization to Close the Non Conformance document then the “Action Taken” tab will be disabled with a message saying “Only authorized users can perform this operation”

The screenshot shows a window titled "NC(Non Conformance)" with four tabs: "Nonconformance", "Root Causes Analysis", "Action Taken", and "Attachment". The "Action Taken" tab is selected. Inside the tab, there is a text area labeled "Action Taken" containing the text "Suggested to maintain consistent temperature". Below this is a "User" dropdown menu with "B11" selected. At the bottom left of the tab area is an unchecked checkbox labeled "Action Taken". At the bottom of the window are two buttons: "Update" and "Cancel".

Next, switch to the *Attachment* tab. On this tab, you can associate all files related to nonconformity. To do so, click on the *Browse* button and select the path of the file you need to attach. Note that the path you enter here should lead to a **network location**. Finally, click the *Update* button.

To view previously added nonconformance activities, right-click on the screen and select the option *Related Activities*.



The screenshot shows a window titled "Activities Overview" with a checkbox labeled "Display Only Open Activities" which is currently unchecked. Below the checkbox is a table with the following columns: Number, Start Date, Start Time, Handled By, Activity, BP Code, BP Name, Co..., Status, Notes, and Assigned ... The table contains one row of data:

Number	Start Date	Start Time	Handled By	Activity	BP Code	BP Name	Co...	Status	Notes	Assigned ...
➡ 12	08/07/14	10:14AM	manager	Meeting	➡ V001					manager

5.3.3 Nonconformance Report

Use the *Nonconformance Report* to view a list of recorded nonconformities that fall within the specified filter criteria.

NC Report- Selection Criteria

Enter NC Date: From 11/01/16 To

Enter Applied Doc Type: SO Delivery

Enter Ref Doc No: From 1 To 3

Enter Item Code: From Gel002 To LECITHIN

Enter Status: ...

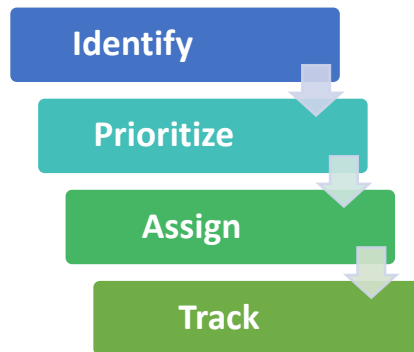
OK Cancel

Next, you may want to look for methods that will help you ensure that the issues don't repeat. CAPA can help you do that. BatchMaster ERP provides you a well-centralized and consolidated CAPA system to manage all incidents that have occurred.

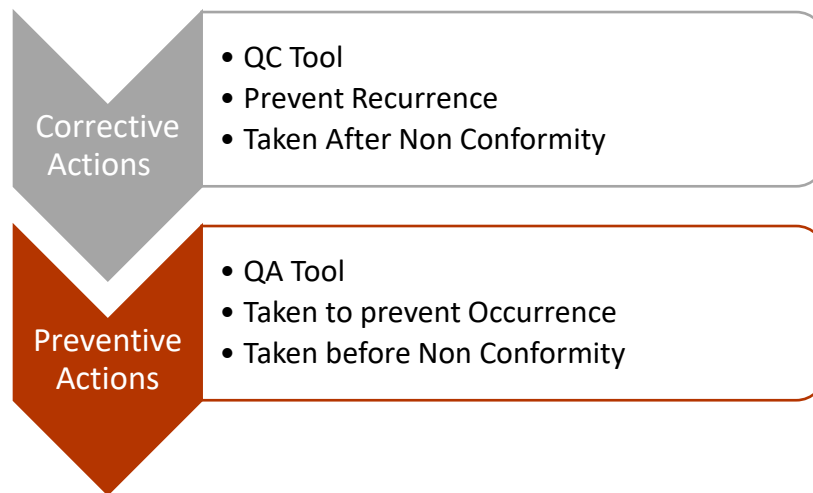
Before proceeding to CAPA main screen, let's have a look at the master screens of CAPA which help you create records associated with CAPA.

5.4 CAPA Overview

CAPA refers to Corrective and Preventive Actions, which is a critical part of quality management. It involves four basic steps. First step is to identify the problems in the product. Secondly, you need to prioritize the problems. At the third step, you need to assign the responsibility to rectify the problems to appropriate personnel. Finally, you need to track whether the problem has been resolved.



Let us now compare corrective actions and preventive actions, for better understanding.



Corrective action is a QC tool because it focuses on identifying defects in the product, whereas preventive action is a QA tool because it focuses on monitoring the process so as to prevent defects in products.

5.4.1 CAPA Types

CAPA processes can be grouped on the basis of their characteristics. You can define such groups using the *CAPA Types* screen.

Go To: Administration → Setup → Quality Control Setup → CAPA Types

5.4.4 CAPA

The CAPA screen lets you record all details about business situations that warrant a permanent record for future reference.

Go To: Quality Control → CAPA

The screenshot shows the CAPA form interface. The header section includes fields for CAPA No., Priority (set to Low), CAPA Date (10/20/16), Status (New), and Owner (manager). The Origin tab is active, displaying fields for Assigned To (manager), Department (General Department), Category, Branch (Main Branch), Type, and Sch.Completion Date (10/20/16). The CAPA Details field contains the text "Maintain storage temperature". Below this is a table for Related NCs with columns: NC No., NC Date, Cust\Vendor, LOT, QC Test, and U_ACTUALV... The table is currently empty. At the bottom of the form are "Add" and "Cancel" buttons.

Let's start with the fields on the header section of the screen. In the *Priority* field, enter the urgency level of the CAPA.

Next, in the *Owner* field, enter the user who is responsible for this CAPA process. In the *CAPA Date* field, enter the date on which the CAPA was undertaken.

Now switch to the *Origin* tab. In the *Assigned To* field, enter the user who is assigned the CAPA task. Next, select an appropriate *CAPA Category* and *CAPA Type*. In the *CAPA Details* field, enter data explaining why the record has been opened.

Next, select the department for which you are defining CAPA and also enter the branch code. In the *Scheduled Completion Date* field, enter the date on which CAPA process is expected to be completed.

Click ADD at this point to save the CAPA record.

Now switch to the *Investigation* tab.

The screenshot shows the CAPA form with the following data:

Field	Value
CAPA No.	
Priority	Low
CAPA Date	10/20/16
Status	New
Owner	manager
Reason	CAPA_121
Investigated By	inpatidar
Date	10/20/16
Details	
Specification #	SP001
Specification	1
Comments	

Select an appropriate reason for CAPA, in the *Reason* field. In the *Investigated By* field, select the user who has assigned the investigation job. Next in the *Date* field, enter the date on which the investigation process has been started. In the *Details* field, enter details about the investigation process.

Refer to the *BME-B1 18.2 QC User Guide* for information about Specifications and Specification Groups.

Once the investigation process is complete, check the *Action Complete* option. Click the UPDATE button to save the record. At this stage, the CAPA status changes from *New* to *Investigation Completed*.

Now move on to the *Corrective Action* tab to enter the measures taken to correct the non-conformance.

The screenshot shows a software window titled "CAPA" with the following fields and tabs:

- Fields:**
 - CAPA No. (text input)
 - Priority: Low (dropdown menu)
 - CAPA Date: 10/20/16 (text input)
 - Status: New (dropdown menu)
 - Owner: manager (text input)
- Tabs:** Origin, Investigation, **Corrective Action** (selected), Preventive Action, Verification, Attachments
- Action Taken:** Mixture should be stored at minimum freezing point (text area)
- User:** npatidar (dropdown menu)
- Correction Date:** 10/20/16 (text input)
- Action Complete:** (checkbox)
- Buttons:** Add, Cancel

In the *User* field, enter the user who is responsible to carry out the corrective action. In the *Correction Date* field, enter the date on which the corrective actions were accomplished.

Once you have implemented the corrective actions, select the *Action Complete* checkbox and click the *Update* button. The record status changes to *Corrective Action Taken*.

Now switch to the *Preventive Action* tab.

The screenshot shows the CAPA form with the following details:

- Form Title:** CAPA
- Fields:**
 - CAPA No. (empty)
 - Priority: Low
 - CAPA Date: 10/20/16
 - Status: New
 - Owner: manager
- Tabs:** Origin, Investigation, Corrective Action, Preventive Action (selected), Verification, Attachments
- Action Taken:** A boilerplate instruction is released
- User:** npatidar
- Preventive Action Verification Date:** 10/20/16
- Checkboxes:** Action Complete
- Buttons:** Add, Cancel

In the *Action Taken* field, enter the action that you have undertaken to prevent the recurrence of the non-conformance. Next, enter the user who is responsible for the preventive actions. Also, enter the date on which the preventive action was verified. Finally, check the *Action Complete* option and click on *Update* button. The record status changes to *Preventive Action Taken*.

Switch to the *Verification* tab.

The screenshot shows a CAPA form with the following details:

- Form Title: CAPA
- Fields: CAPA No., Priority (Low), CAPA Date (10/20/16), Status (New), Owner (manager)
- Navigation: Origin, Investigation, Corrective Action, Preventive Action, **Verification**, Attachments
- Verification Tab Content:
 - Comments: 3 level VFD finished
 - Verified by: manager
 - Approved by: manager
 - Action Complete
- Buttons: Add, Cancel

In the *Comments* field, enter the evaluation of the CAPA or any other information related to the CAPA verification process. It is mandatory to specify the comment. Next, in the *Verified By* field, select the user who has performed the verification process. In the *Approved By* field, select the user who has approved the CAPA process. Once the verification process is complete, check the *Action Complete* option and click the *Update* button. As a result, the record status will change to *Verification Completed*.



If the user does not have the authorization to close the CAPA document, then the “Verification” tab will be disabled with a message saying “Only authorized users can perform this operation”

Attach any supporting documents related to the CAPA on the *Attachment* tab. The path you browse here should lead to a network (shared) location.

The screenshot shows a software window titled "CAPA" with several input fields and a table. The fields are: CAPA No. (empty), Priority (Low), CAPA Date (14/11/18), Status (New), and Owner (manager). Below these fields are tabs for "Origin", "Investigation", "Corrective Action", "Preventive Action", "Verification", and "Attachments". The "Attachments" tab is selected, showing a table with the following data:

#	Source Path	Target Path	File Name	Attachment Date
1	\\Eworkplace\temp		net.pdf	14/11/18

To the right of the table are three buttons: "Browse", "Display", and "Delete". At the bottom of the window are "Add" and "Cancel" buttons.

Click the UPDATE button at this point to save your edits.

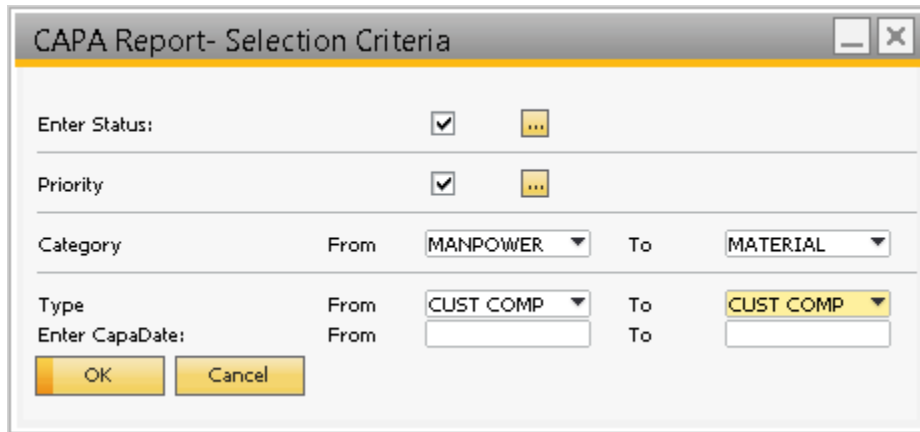
You can add an activity with the CAPA process by right clicking on the screen and selecting the *New Activity* option.

To view the activities already added with CAPA processes, select the *Related Activities* option by right clicking on the CAPA screen.

Number	Start Date	Start Time	Handled By	Activity	BP Code	BP Name	Co...	Status	Notes	Assigned ...
➔ 12	08/07/14	10:14AM	manager	Meeting	➔ W001					manager

5.4.5 CAPA Report

Use the *CAPA Report* screen to generate a CAPA report that lets you monitor the root causes and suggested action plans investigated by CAPA.



The screenshot shows a dialog box titled "CAPA Report- Selection Criteria". It contains several input fields and checkboxes:

- Enter Status:** A checkbox that is checked, followed by a yellow button with three dots.
- Priority:** A checkbox that is checked, followed by a yellow button with three dots.
- Category:** A section with "From" and "To" labels. The "From" dropdown is set to "MANPOWER" and the "To" dropdown is set to "MATERIAL".
- Type:** A section with "From" and "To" labels. The "From" dropdown is set to "CUST COMP" and the "To" dropdown is set to "CUST COMP".
- Enter CapaDate:** A section with "From" and "To" labels, each followed by an empty text input field.

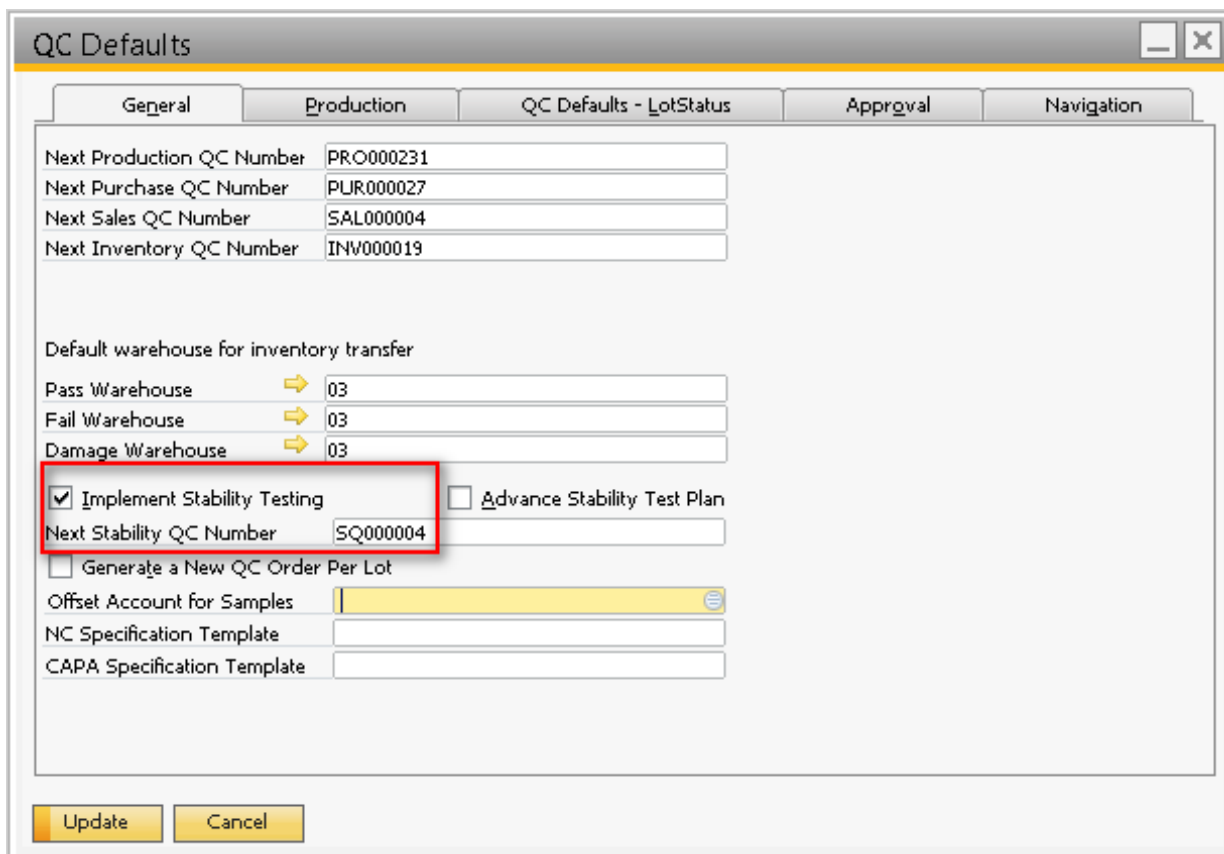
At the bottom of the dialog box are two buttons: "OK" and "Cancel".

6 Stability Testing

Since you may not sell a product immediately after making it, it is important to define and enforce stability tests. By doing so you can verify the quality of a finished good over a specific time under the conditions of temperature and relative humidity. You can use this module to create stability test plans, norms, standards, and records and then implement stability testing.

6.1 QC Defaults

Using the *QC Defaults* screen, enable the stability testing feature within the system.



The screenshot shows the 'QC Defaults' window with the 'General' tab selected. The window has a title bar with standard minimize and close buttons. Below the title bar are five tabs: 'General', 'Production', 'QC Defaults - LotStatus', 'Approval', and 'Navigation'. The 'General' tab contains the following fields and options:

- Next Production QC Number: PRO000231
- Next Purchase QC Number: PUR000027
- Next Sales QC Number: SAL000004
- Next Inventory QC Number: INV000019
- Default warehouse for inventory transfer: 03
- Pass Warehouse: 03
- Fail Warehouse: 03
- Damage Warehouse: 03
- Implement Stability Testing
- Advance Stability Test Plan
- Next Stability QC Number: SQ000004
- Generate a New QC Order Per Lot
- Offset Account for Samples: (empty field)
- NC Specification Template: (empty field)
- CAPA Specification Template: (empty field)

At the bottom of the window are two buttons: 'Update' and 'Cancel'. A red box highlights the 'Implement Stability Testing' checkbox and the 'Next Stability QC Number' field.

Select the *Implement Stability Testing* checkbox on the *General* tab. Next, you need to provide the *Next Stability QC Number* that will be used while creating next QC order.

Check the *Generate a New QC Order Per Lot* option, if you want to apply QC on individual lots of raw materials.

Enter the *Offset Account for Sample*, when a sample is taken from a lot. This will be considered as a Goods Issue Transaction.

Refer to the *BME-B1 18.2 QC User Guide* for information on defining Specifications.

6.2 Stability Test Plan

Testing product stability is a major concern for all Nutraceutical and Pharmaceutical industries. The stability testing feature in BatchMaster ERP records how the quality of a product varies with time under the impact of environmental conditions such as temperature, humidity, and light. This helps you determine effective storage conditions.

Go To: Administration → Setup → Quality Control Set-up → Stability Plan

#	Frequency Plan Name	Frequency Days	Remarks
	Temp Stability	3	Test item stability under normal temperature 37 C and accele

First, you need to enter a unique stability plan identifier at the *Stability Plan ID* field. Next, enter the related description. Your company's products may be evaluated under specific storage conditions. You can use the *Normal testing* and *Accelerated testing* fields. The values in these fields decide the subsequent testing actions.

Next, you need to define the frequency for stability testing. Consider an example: For long term conditions, generally the testing frequency considered is every 3 months over the first year, every 6 months over the second year and annually thereafter. For accelerated storage conditions generally it is a minimum of 3 points including initial and final points of time. For examples 0, 3, and 6 months.

6.3 Item Master Detail Modifications

You can associate the stability test plan with an inventory item on the *Item Master Details* screen. On the *Quality Control* tab of the *Item Master Details* screen, select the *Stability Test Plan*.

On the grid, add tests for those parameters, based on how you want to test the stability of the item. Select the *Stability QC* checkbox for the desired tests on the grid to implement QC stability tests on the item while processing QC orders.

The screenshot shows the 'Item Master Details' window with the 'Quality Control' tab selected. The 'Stability Test Plan' field is highlighted with a red box and contains the value 'ST001'. Below this is a table with the following columns: '# rks', 'Purchase QC', 'Production QC', 'Sales QC', 'Inventory QC', and 'Stability QC'. The first row of the table has a checked checkbox in the 'Stability QC' column, which is also highlighted with a red box. The 'Update' and 'Cancel' buttons are visible at the bottom of the window.

# rks	Purchase QC	Production QC	Sales QC	Inventory QC	Stability QC
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The stability test automatically gets created for the item in the frequency specified on the stability test screen. You can approve the test created from the QC dashboard screen.

6.4 QC Dashboard

You can view the QC orders as per the filter you have applied on the selection criteria in the dashboard. Also, you can assign the tests as well, using the *Assign Test* button.

Go To: Quality Control → QC Utilities → QC Dashboard

Qc Order#	QC Type	QCType1	Status	Item Code	Description	WlhsCode	LotNo	Test Qty	Receipt Doc #
QC000002	Inventory 4		New	VIMS	Vitamins and Miner...	01	VIMS001	10.000	
QC000002	Inventory 4		New	VIMS	Vitamins and Miner...	01	VIMS002	10.000	
QC000002	Inventory 4		New	VIMS	Vitamins and Miner...	01	VIMS003	10.000	
QC000002	Inventory 4		New	VIMS	Vitamins and Miner...	01	VIMS004	10.000	

Select	Sample No	Test Code	Test Descrip...	Test Unit	Test Method	Test Category	Inspection
<input type="checkbox"/>	1	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	2	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	3	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	4	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	5	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	6	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	7	Test01	Test01	GM	Physical	Physical	C
<input type="checkbox"/>	8	Test01	Test01	GM	Physical	Physical	C

You can draw the stability test orders that are due, say 7 days, from the *Pending test* tab of the *QC Dashboard*. Refer to section 6.2.

Select the order from the grid and click the *Generate Orders* button.

6.5 Quality Control Order – QC

You can view and perform Stability QC testing of the item from the *Quality Control Order QC* screen.

Quality Control Order - QC

QC No. Reference Doc. No. No.
 QC Type **Stability QC** Reference Doc. Type BP Code
 Status Owner
 Req Date 10/20/16 Notes
 Completed Date

#	Item Code/F...	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty
1	VIMS	Supplement (tab)		01	VIMS001	10.000	0.000	0.000	0.000
2						0.000	0.000	0.000	0.000

Sample Set

Selected Item: VIMS Lot: VIMS001

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit
1	1	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
2	2	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
3	3	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
4	4	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
5	5	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
6	6	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
7	7	Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000

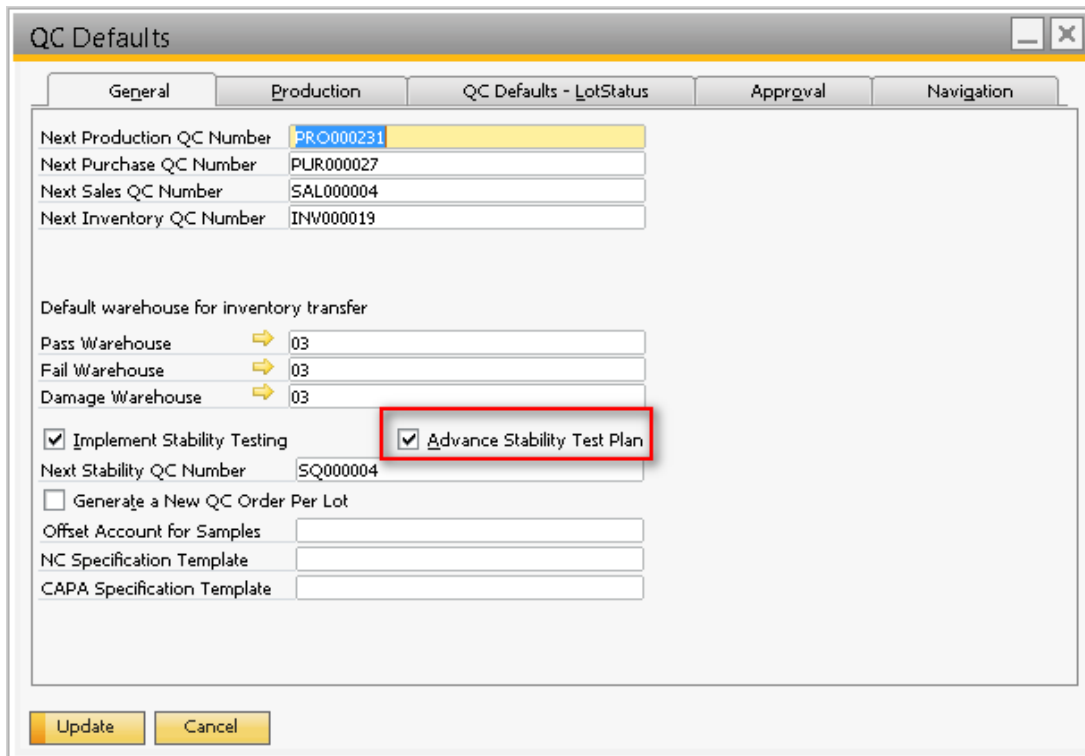
Refer to the *BME-B1 18.2 QC User Guide* for details on using this function.

7 Advanced Stability Testing

BatchMaster ERP provides you an option to implement advance stability testing using which you can define a test plan for 'n' number of days (irrespective of any frequency). You can also maintain different tests for each test plan.

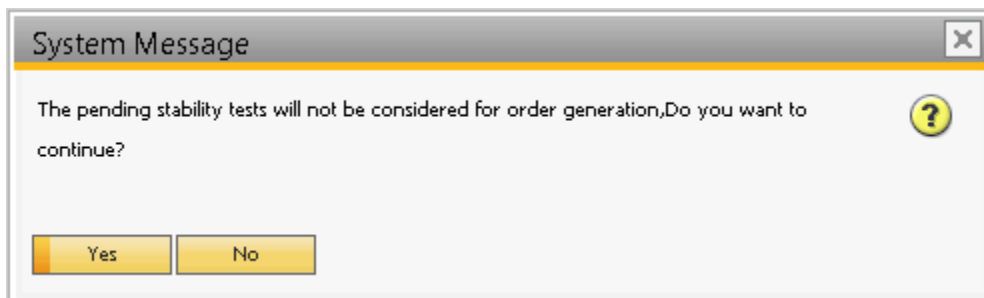
7.1 QC Defaults

Using the *QC Defaults* screen, enable the Advance Stability Test Plan feature within the system.



The screenshot shows the 'QC Defaults' window with the 'General' tab selected. The 'Implement Stability Testing' checkbox is checked, and the 'Advance Stability Test Plan' sub-checkbox is also checked and highlighted with a red box. Other fields include 'Next Production QC Number' (PRO000231), 'Next Purchase QC Number' (PUR000027), 'Next Sales QC Number' (SAL000004), 'Next Inventory QC Number' (INV000019), and 'Next Stability QC Number' (SQ000004). There are also fields for 'Pass Warehouse', 'Fail Warehouse', and 'Damage Warehouse', all set to '03'. At the bottom, there are 'Update' and 'Cancel' buttons.

Select the *Implement Stability Testing* checkbox on the *General* tab. Next, check the *Advance Stability Test Plan* to implement the advance stability. Here note that implementing the *Advance Stability Test Plan* is irreversible. Thus system confirms you to continue as pending stability test will not be considered further to generate orders.



The screenshot shows a 'System Message' dialog box with the text: 'The pending stability tests will not be considered for order generation, Do you want to continue?'. There are 'Yes' and 'No' buttons at the bottom. A question mark icon is visible in the top right corner of the message area.

Clicking on *Yes* will implement the Advance Stability Testing.

Next, you need to provide the *Next Stability QC Number* that will be used while creating next QC order.

Check the *Generate a New QC Order Per Lot* option, if you want to apply QC on individual lots of raw materials.

Enter the *Offset Account for Sample*, when a sample is taken from a lot. This will be considered as a Goods Issue Transaction.

Refer to the *BME-B1 18.2 QC User Guide* for information on defining Specifications.

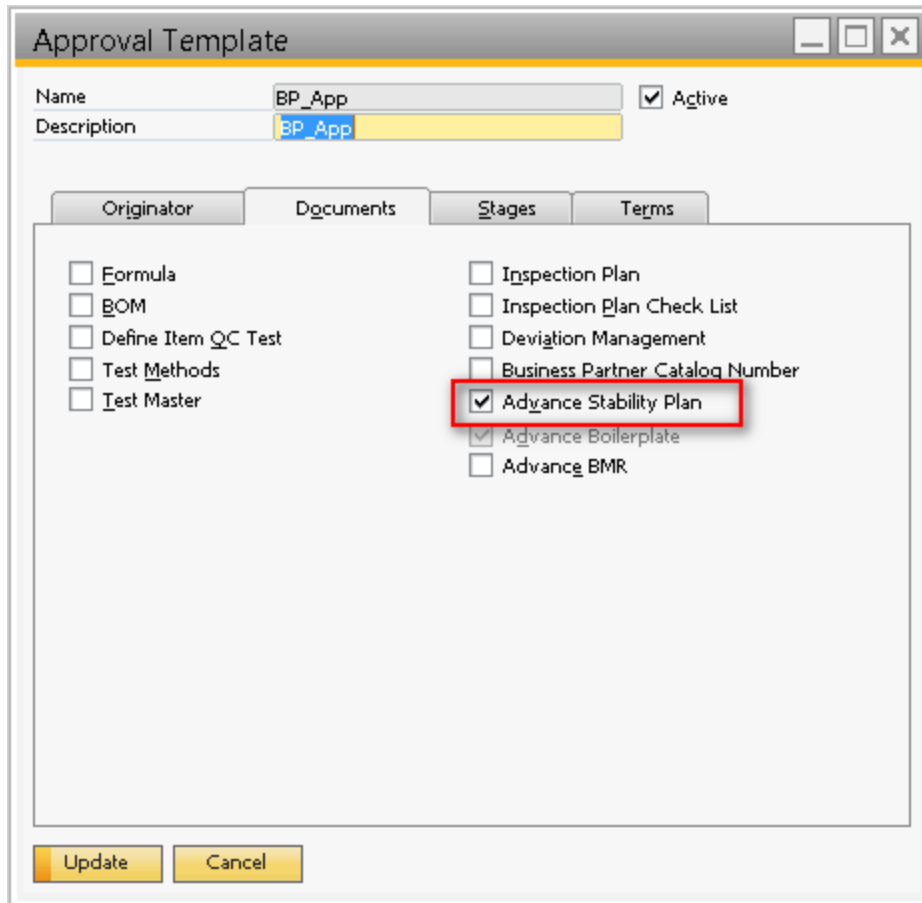
Before creating an Advance Stability Testing Plan, you can apply the approval procedure for *the Advance Stability Test* on the *Approval Template* screen.

Go To: Administration → Approval Procedures → Process Mfg. Approval Procedures → Approval Template

In the *Approval Template* screen, on the *Documents* tab, select the *Advance Stability Plan* checkbox.

Associate an appropriate approval template with the *Advance Stability Plan*.

Go To: Main Menu → Administration → Setup → Process Mfg Appr. Proce. → Approval Template



7.2 Advance Stability Plan

Testing product stability is a major concern for all Nutraceutical and Pharmaceutical industries. The stability testing feature in BatchMaster ERP records how the quality of a product varies over time under the impact of environmental conditions such as temperature, humidity, and light. This helps you determine effective storage conditions and shelf life.

On the *Advance Stability Plan* screen you can define different Frequency Plans and set the Frequency days, determining in how many days you want the system to create a Stability QC order to test the item's stability. In the Test Specifications grid, with respect to an individual Frequency plan, you can define a set of tests needed to be applied to the item. You are no longer bound to implement the same set of tests for all frequency plans as every frequency plan can have the same or different tests.

Go To: Administration → Setup → Quality Control Set-up → Stability Plan

Advance Stability Plan

Stability Plan ID: S002
 Stability Plan Description: S002

Test Frequency

#	Frequency Plan Name	Frequency Days	Remarks
1	7	7	
2	20	20	

Test Specifications

#	Test Code	Test Type	Lower Value	Upper Value	Numeric
1	FRESHNESS	AlphaNumeric	0.000	0.000	0.000
2	COLOUR	PassFail	0.000	0.000	0.000

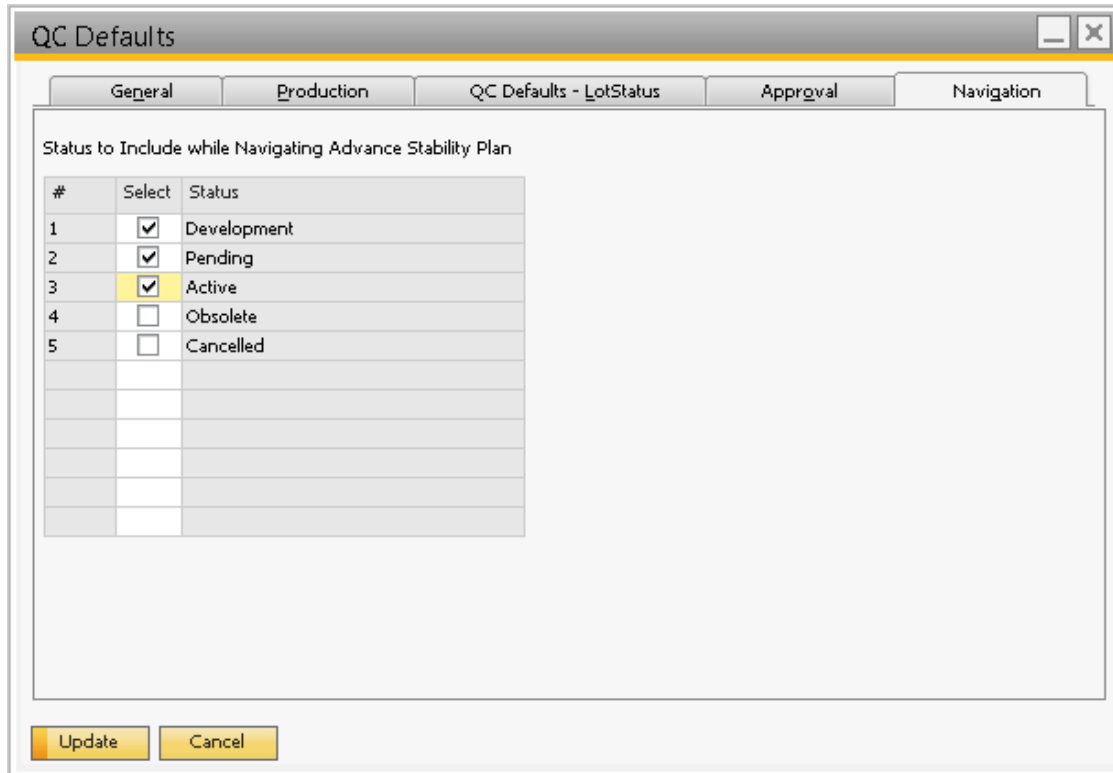
OK Cancel

First, you need to enter a unique stability plan identifier at the *Stability Plan ID* field and enter the related description. Your company's products may be evaluated under specific storage conditions.

Next, you need to define the frequency for stability testing. Consider an example: For long term conditions, generally the testing frequency considered is every 3 months over the first year, every 6 months over the second year and annually thereafter. For accelerated storage conditions generally it is a minimum of 3 points including initial and final points of time. For examples 0, 3, and 6 months.

7.3 Navigation Control of Advance Stability Plan

On the *QC Defaults* screen, on the Navigation tab you can select the status need to be included when navigating on the Advance Stability Plan screen.



The screenshot shows a window titled "QC Defaults" with a tabbed interface. The "Navigation" tab is selected. The main area contains a table titled "Status to Include while Navigating Advance Stability Plan". The table has three columns: "#", "Select", and "Status". The rows are as follows:

#	Select	Status
1	<input checked="" type="checkbox"/>	Development
2	<input checked="" type="checkbox"/>	Pending
3	<input checked="" type="checkbox"/>	Active
4	<input type="checkbox"/>	Obsolete
5	<input type="checkbox"/>	Cancelled

At the bottom of the window, there are two buttons: "Update" and "Cancel".

7.4 Item Master Detail Modifications

You can associate the stability test plan with an inventory item on the *Item Master Details* screen. On the *Quality Control* tab of the *Item Master Details* screen, select the *Stability Test Plan*.

Item Master Details

Item Number → S_berry
Description S_berry
Alternate Desc GTIN

Inventory Quality Control UoM Conversion Batch Options Certificate Details

Inspection Required
 Automatically create QC order on receipt
Default Lot Status while receiving
QC Revision 0000000005
QC Revise Reason
Sample Plan ID → AS
Stability Test Plan → S002

#	Test Code	Test Code Description	Test Unit	Category	Test Method	Test Lead Time	Inspection	Sample Plan ID
1	→ COLOUR	COLOUR	L	FOOD	PHYSICAL	0000:00:00	Sampling	→ AS
2	→ FRESHNESS	FRESH	K	FOOD	CHEMICAL	0000:00:00	Continuous	
3				T01	M01		Continuous	

Business Partner Wise Test

Update Cancel

The stability test is automatically created for the item in the frequency specified on the Advanced stability plan screen. You can approve the test created from the Advance Stability Plan dashboard screen.

7.5 Advance Stability Dashboard

On the *Advance Stability Dashboard* screen you can draw the item for which a Stability Test is defined and generate the Stability QC order for the required *Stability Test Date*.

Go To: Quality Control → QC Utilities → QC Dashboard

Select	Item Code	Warehouse	Lot/Batch No.	Date Received	Frequency Plan N...	QC Order No.
<input checked="" type="checkbox"/>	S_berry	01	PQ	01/02/19	7	
<input type="checkbox"/>	S_berry	01	PQ	01/02/19	20	→ SQ000003

Select the order from the grid and click the *Generate Order* button.

On the screen you can select and generate the Stability QC Orders for the required item.

Item Code: Search and select the item for which you want to generate a Stability QC order.

Warehouse: Specify the warehouse of the selected item.

Lot/Batch: Search and select the required lot.

Stability Plan: Displays the Stability Plan attached to the item.

Date Received: Shows the date on which the selected lot was received.

Show Details: Click this button to display the details on the basis of the selection made.

Select: Check this checkbox to select the respective line in the grid.

Item Code: Shows the unique code of the item.

Warehouse: Displays the item warehouse.

Lot/Batch No: Shows the item lot.

Date Received: Shows the date on which the lot was received.

Frequency Plan Name: Displays the applicable frequency plan.

QC Order No: Displays the Stability QC order number if already generated.

Stability Test Date: Calculates and displays the date of the Stability test on the basis of frequency days of the respective Frequency Plan.

Generate Order: Use this button to generate the Stability QC order for the selected line.

7.6 Quality Control Order – QC

You can view and perform Stability QC testing of the item from the *Quality Control Order QC* screen.

Quality Control Order - QC

QC No. Reference Doc. No. No.
QC Type **Stability QC** Reference Doc. Type BP Code
Status Req Date Owner
Completed Date Notes

#	Item Code/F...	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty
1	⇒ VIMS	Supplement (tab)		⇒ 01	VIMS001	10.000	0.000	0.000	0.000
2						0.000	0.000	0.000	0.000

Sample Set

Selected Item: VIMS Lot: VIMS001

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit
1	1	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
2	2	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
3	3	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
4	4	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
5	5	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
6	6	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000
7	7	⇒ Test01	Test01	GM	Physical	Physical	Continuous	PassFail	0.000

Refer to the *BME-B1 18.2 Quality Control Guide* for details on using this function.

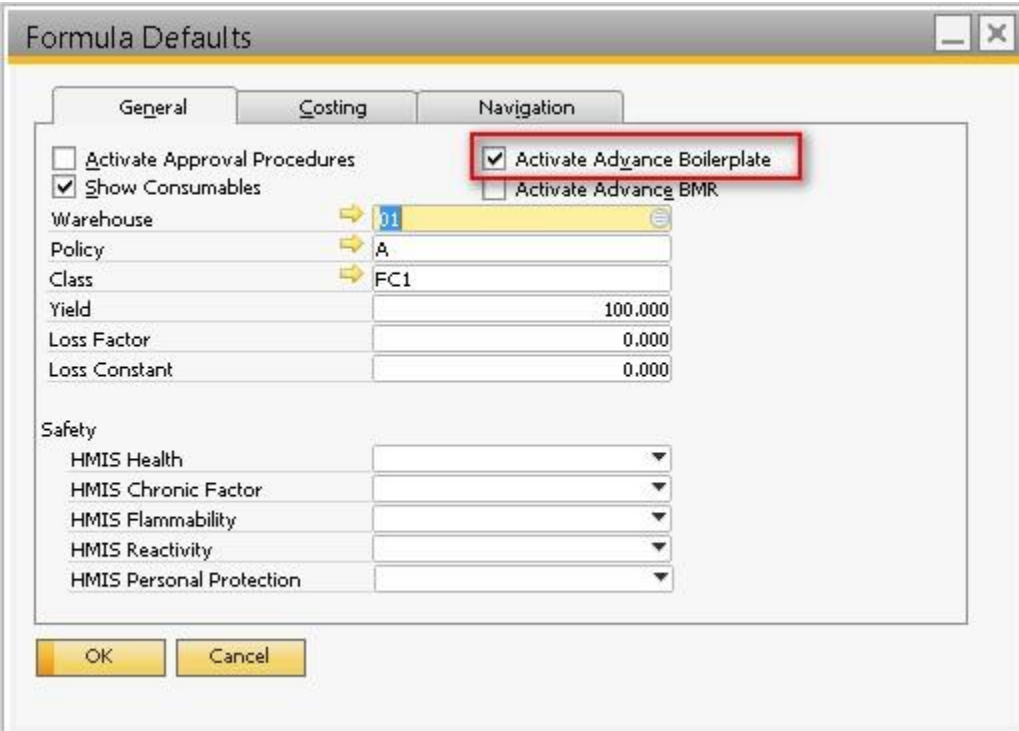
8 Advanced Boilerplate

BatchMaster ERP supports the performing of in process inspection and checklist while weighing or issuing material.

8.1 Formula Defaults

Using the *Formula Defaults* screen, select the *Activate Advance Boilerplate* checkbox to enable the Advanced Boilerplate feature.

Go To: Main Menu → Administration → Setup → Formula → Formula Defaults



The screenshot shows the 'Formula Defaults' window with three tabs: 'General', 'Costing', and 'Navigation'. The 'General' tab is active. In the top right corner, the checkbox 'Activate Advance Boilerplate' is checked and highlighted with a red box. Other visible options include 'Activate Approval Procedures' (unchecked), 'Show Consumables' (checked), and 'Activate Advance BMR' (unchecked). Below these are fields for Warehouse (01), Policy (A), Class (FC1), Yield (100.000), Loss Factor (0.000), and Loss Constant (0.000). A 'Safety' section contains dropdown menus for HMIS Health, HMIS Chronic Factor, HMIS Flammability, HMIS Reactivity, and HMIS Personal Protection. 'OK' and 'Cancel' buttons are at the bottom.

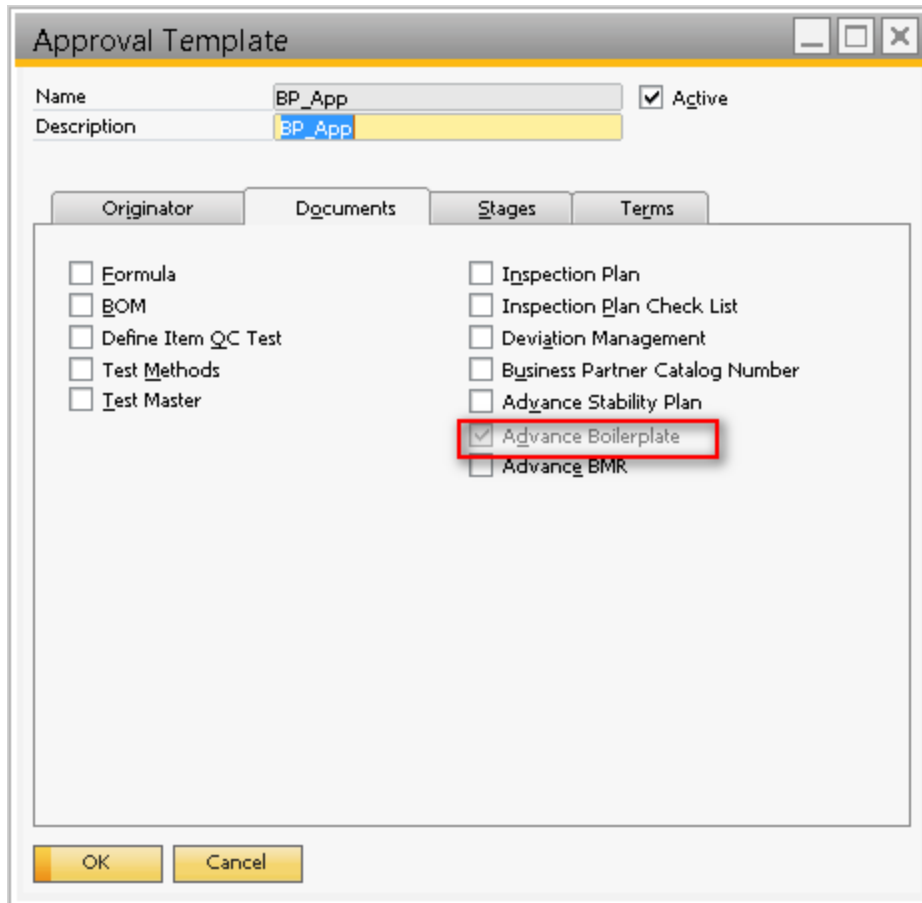
Now you can use the Manufacturing Instructions screen to create the Advance Boilerplate.

Before creating a Manufacturing Instruction, you can apply an approval procedure for the *Advance Boilerplate* on the *Approval Template* screen.

Go To: Main Menu → Administration → Setup → Process Mfg Appr. Proce. → Approval Template

In the *Approval Template* screen, on the *Documents* tab, select the *Advance Boilerplate* checkbox.

Associate an appropriate approval template with the *Advance Boilerplate* and *Update* the settings.



8.2 Manufacturing Instructions

The Advance Boilerplate is specifically designed to define different types of boilerplate, such as *Inspection, Checklist, Boilerplate* and *Require user Input*.

On the *Manufacturing Instruction* screen you can specify the type of boilerplate you need to create. To access the screen,

Go To: Formulation → Manufacturing Instructions

Boilerplate ID: Enter a unique identification key for the Boilerplate here.

Revision: Displays the approved revision number of the boilerplate.

Status: Shows the current status of the boilerplate.

Send for Approval: Click this button to send the record for approval.

Cancel Approval: Click this button to cancel the document approval.

Revise Boilerplate ID: Use this button to generate the new revised boilerplate.

Make Obsolete: Use this button to obsolete the record.

Browse: Click to search and select the file you need to attach to the manufacturing instruction record.

Display: Use this button to view the attached file.

Boilerplate Group: Select an applicable boilerplate group here.

Boilerplate Type: Using the dropdown, select the boilerplate type as one of *Boilerplate*, *Inspection*, *Checklist* or *Require User Input*. If you select the *Inspection/Checklist* option then in the field below you need to associate the required *Inspection/Checklist* plan. For the option *Required User Input* a grid is displayed to specify the parameters for user input.

Verification Required: This checkbox functionality is related to BatchMaster WMS.

OK: Use this button to save the record with the required modifications.

Cancel: Click this button to exit from the screen without saving the record.

8.2.1 Defining different types of Advance Boilerplate

On the Manufacturing Instruction screen you can define the following types of Boilerplate:

- 1. Boilerplate Type as *Require User Input*:** This boilerplate type is useful if you want to take input from the user. Choosing this option shows a grid in the below area where you can define an input parameter and details.

The screenshot shows the 'Manufacturing Instructions (Draft)' window. The Boilerplate ID is BI190, Revision is 000000001, and Status is Development. The Text field contains 'Observe the color and texture when mixing {T}'. The Boilerplate Type is set to 'Required User Input'. Below this, a table defines input parameters:

#	Input Name	Input Type	List	Input Instruction	Variable
1	Temp	Numeric		Enter the current temperature	T
2	Appearance	List	List_01	List to follow	
3					

You can define a variable in Curly braces in the *Text* field. Say, the variable {T} is defined to store a temperature. The defined variable can be selected using the respective drop down in the grid.

This screenshot highlights the variable {T} in the Text field and the variable 'T' in the Variable column of the grid. The variable {T} is enclosed in a red box in the text field, and the variable 'T' in the grid is also enclosed in a red box.

The available Input types are *Alphanumeric*, *List*, *Numeric*, *Date/Time* and *Boolean*. For a list type of *Input* you can pre-define a list through a *List Master*.

#	Value
1	Clean
2	Grease
3	Fill
4	Topping
5	

- Boilerplate Type as *Boilerplate*:** With this option as selected you can create a simple Boilerplate to be used as text.

Boilerplate ID: B1001 Revision: 000000001 Status: Development

Text: Mix well before use

Boilerplate Type: **BoilerPlate** Verification Required

Buttons: Send For Approval, Cancel Approval, Revise Boilerplate ID, Make Obsolete, File Name, Browse, Display

3. **Boilerplate Type as Checklist:** For the Boilerplate Type as *Checklist*, you can attach a Checklist as a boilerplate, to be followed as an SOP (Standard Operating Procedure) for batch manufacturing.

The screenshot shows the 'Manufacturing Instructions (Draft)' window. At the top, the Boilerplate ID is 'BNew', Revision is '0000000001', and Status is 'Development'. The main text area contains 'Follow the checklist'. On the right side, there are buttons for 'Send For Approval', 'Cancel Approval', 'Revise Boilerplate ID', and 'Make Obsolete'. Below these is a 'File Name' field with 'Browse' and 'Display' buttons. At the bottom, the 'Boilerplate Group' is 'BP001' and the 'Boilerplate Type' is 'CheckList' with a dropdown arrow. Below the dropdown is a text field containing 'Chk001'. A checkbox for 'Verification Required' is present and unchecked. 'OK' and 'Cancel' buttons are at the bottom left.

4. **Boilerplate Type as Inspection:** With this Boilerplate type you can attach an Inspection plan as a boilerplate, containing different activities to undertake for product examination during production.

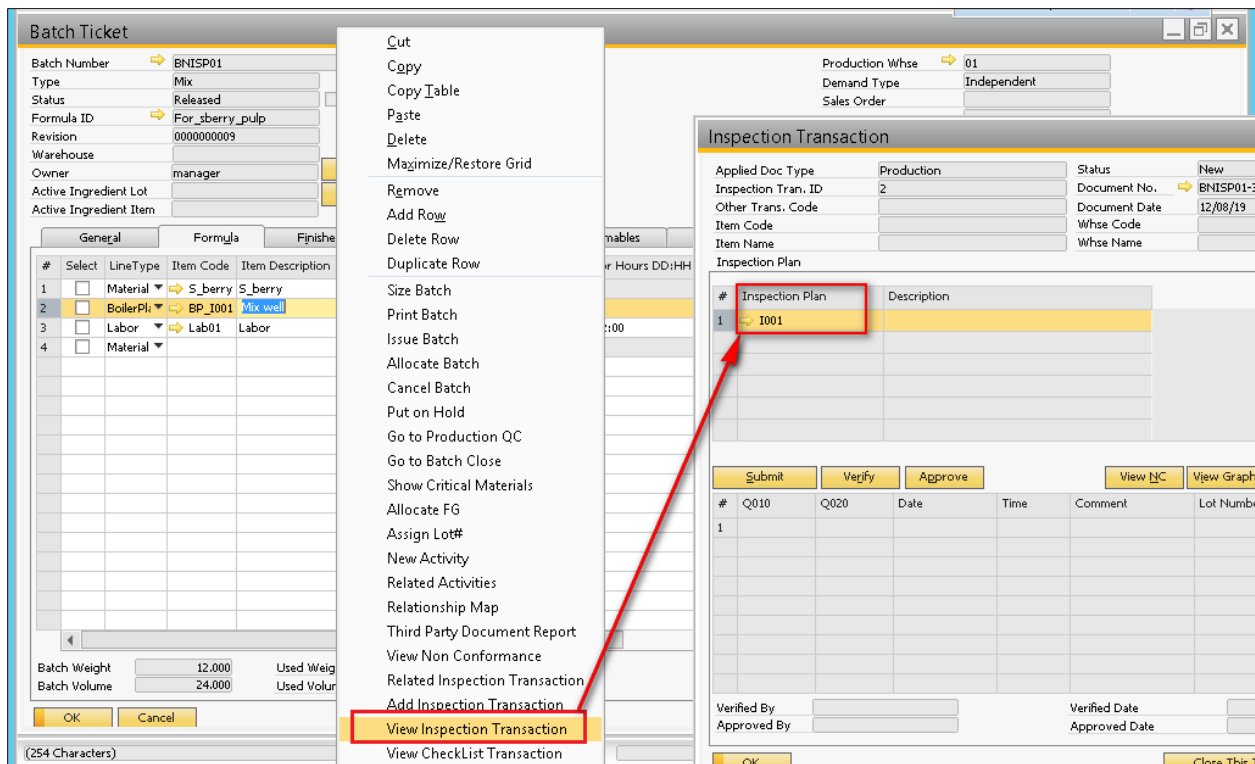
The screenshot shows the 'Manufacturing Instructions (Draft)' window. At the top, the Boilerplate ID is 'BI190', Revision is '0000000001', and Status is 'Development'. The main text area contains 'Observe the color and texture when mixing'. On the right side, there are buttons for 'Send For Approval', 'Cancel Approval', 'Revise Boilerplate ID', and 'Make Obsolete'. Below these is a 'File Name' field with 'Browse' and 'Display' buttons. At the bottom, the 'Boilerplate Group' is empty and the 'Boilerplate Type' is 'Inspection' with a dropdown arrow. Below the dropdown is a text field containing 'I001'. A checkbox for 'Verification Required' is present and unchecked. 'OK' and 'Cancel' buttons are at the bottom left.

Inspection Plan/Checklist Type of Boilerplate

You can attach the Inspection Plan/Checklist Type of Boilerplate with the formula at the *Formula Entry* screen.

#	Type	Item Code	Item Description	Wt %	Vol %	Quantity in Stock UOM	Quantity	Item Co
1	Material	S_berry	S_berry	100.000	100.000	1.000	1.000	
2	Boilerplate	BP_I001	Mix well	0.000	0.000	0.000	0.000	

Using the options, *View Inspection Transaction/View Checklist Transaction*, the attached *Inspection Plan/Checklist* can be viewed at the *Batch Ticket, Batch Close, Super Batch Close* screen.



The checklist if attached with the formula can be viewed on the batch using the *View Checklist Transaction* option.

9 Business Partners

As a Nutraceutical or Pharmaceutical manufacturer, your vendors/suppliers must be qualified as per cGMP requirements. For supplier qualification, you need to:

- Write an SOP that includes steps for qualification;
- Maintain required documentation;
- Develop procedures for ongoing monitoring of suppliers and ensure that they are qualified.

Documents required to qualify a supplier include: supplier's response to quality system questionnaires, raw material specifications, supplier's documents such as specification sheets and BPRs, documents related to supplier's GMP compliance, supplier's certificate of analysis, QC test results performed to verify COA information, and supplier's terms and conditions.

9.1 Business Partner Master Data

The Business Partner Master Data screen is now enhanced to accommodate vendor/supplier qualification details.

Go To: Business Partners → Business Partner Master Data.

On the Business Partner Master Data screen, select your category as *Vendor* and select an appropriate vendor *code*. Next, you need to enable user-defined fields by clicking on *User-Defined Fields* under the Windows “View” menu. Alternatively, you can press **Ctrl + Shift + U**.

The screenshot displays the 'Business Partner Master Data' window. On the left, a 'general' tab is active, showing fields for Halal and Kosher certificates, GMP Vendor Qualification Number (XYZ2001), and Vendor Qualification (Qualified). The main area shows the 'General' tab with fields for Code (Manual XYZ), Name (XYZ), Foreign Name, Group (Customers), Currency (US Dollar), and Federal Tax ID. It also includes financial fields like Account Balance, Deliveries, Orders, and Opportunities, all set to 0.00. Below these are tabs for Contact Persons, Addresses, Payment Terms, Payment Run, Accounting, Properties, Remarks, and Attach. The 'Contact Person' section includes fields for Tel 1, Tel 2, Mobile Phone, Fax, E-Mail, Web Site, Shipping Type, Password, Factoring Indicator, BP Project, Industry, Business Partner Type (Company), Alias Name, and GLN. There are also radio buttons for Active, Inactive, and Advanced status, and a 'Remarks' field.

One of your vendors has been qualified as per cGMP requirements, and you want to add relevant information along with the vendor information.

In the GMP Qualification Number field, enter the cGMP vendor qualification number. Next, enter the date on which the vendor was qualified, in the Qualification Date field. Also, enter the next Audit Date.

If the Qualification Date/Audit Date falls on or before the system date, then the system displays a warning message. This is only for reference purposes so you can decide if you want to re-qualify the vendor.

The screenshot shows a 'System Message' dialog box with a yellow header and a question mark icon. The message text reads: 'Selected vendor does not qualify, please check vendor qualification date/audit date. Do you want to continue?'. At the bottom, there are two buttons: 'Yes' and 'No'.

Using the drop-down key on the Qualification Basis field, select the factors based on which a vendor can be qualified. The drop-down includes:

- Questionnaire
- COFA
- BMR
- Certification
- Other

You can enter any additional information or notes in the Qualification Remarks field.

As a part of prerequisites, *BatchMaster ERP* recommends you create a relationship between business partners and items using the Business Partner Catalog Numbers screen.

You can add any document relevant to vendor qualification, on the *Attachments* tab. Click the *Browse* button on the *Attachments* tab to select the desired document.

You will be able to attach any document on the Business Partner Master Data screen if you have enabled the Attachment Folder on the Path tab of the *General Settings* screen.

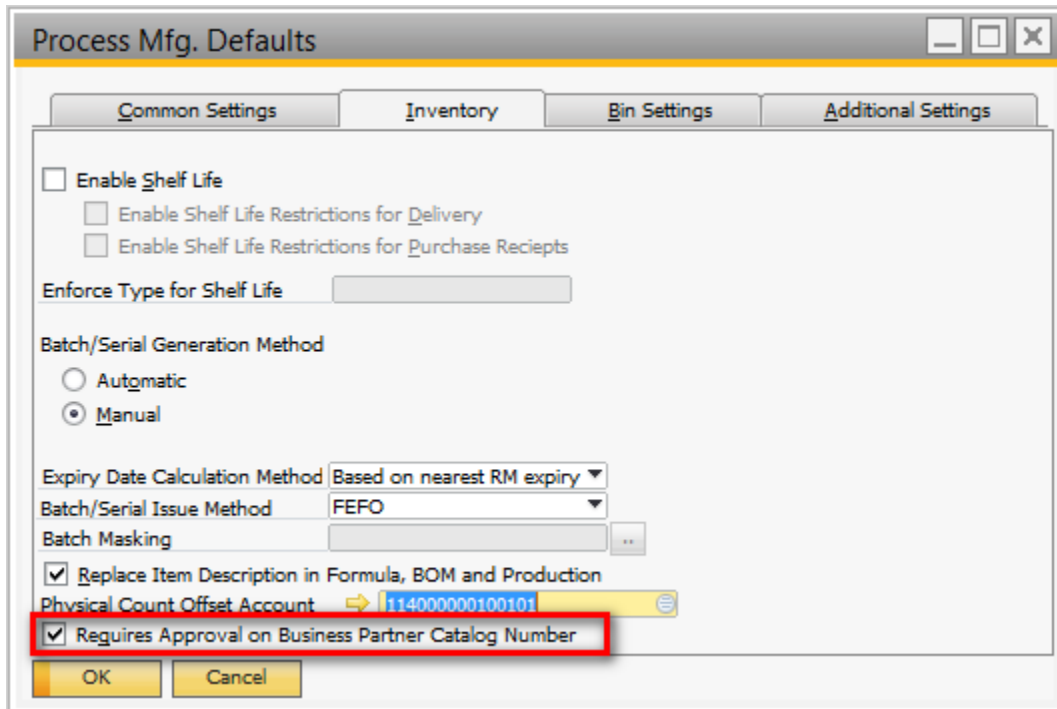
(Administration → System Initialization → General Settings)

Click the *Update* button to save the information added.

9.2 Business Partner Catalog Number-Draft

The Business Partner Catalog Number Screen is available to configure your item number or code to vendor/customer catalog number. BatchMaster ERP offers you a capability to implement Approval workflow on BP Catalog No.

On the *Process Mfg. Defaults Screen*, the 'Require Approval on Business Partner Catalog Number' checkbox is available. Once selected, approval procedure is applied on it.



The screenshot shows the 'Process Mfg. Defaults' dialog box with the 'Additional Settings' tab selected. The 'Requires Approval on Business Partner Catalog Number' checkbox is checked and highlighted with a red box. Other visible settings include 'Enable Shelf Life' (unchecked), 'Batch/Serial Generation Method' set to 'Manual', 'Expiry Date Calculation Method' set to 'Based on nearest RM expiry', and 'Batch/Serial Issue Method' set to 'FEFO'.

Associate an appropriate approval template with the BP Catalog number.

Go To: Main Menu → Administration → Setup → Process Mfg Appr. Proce. → Approval Template

Applying approval on Business Partner Catalog Number, the Business Partner Catalog Number-Draft screen gets activated. On the screen you can configure Business Partner item code with your item and send it for approval.

Go To: Main Menu → Inventory → Business Partner Catalog Numbers-Draft.

On the *BP Code* field, select the business partner for whom you wish to define catalog number. Choose the item for which you are defining a catalog. In the *BP Catalog No* field, specify the business partner catalog number for the item. Next, mention the shelf life of the item in the *Shelf Life Days* field and click

the *Add* button. The *Send of Approval* button gets activated, click on it to initiate the approval process. Follow the approval cycle. Once the document is approved by all authorized user, its status changes to Active. You can create a new revision of BP catalog number using the Revise BP Catalog No button. The Cancel Approval button is available to cancel the approval request.

10 Sampling Management

This sales and opportunities-driven function leverages on the capabilities of the sampling techniques to derive product samples and present them for approvals on sales opportunities.

10.1 Sampling Setup

Use this screen to auto-generate project IDs and assign the default specification template. To access this screen, choose:

Go To: Administration → Setup → Sales Request Management → Sampling Setup

10.2 Sales Request Management

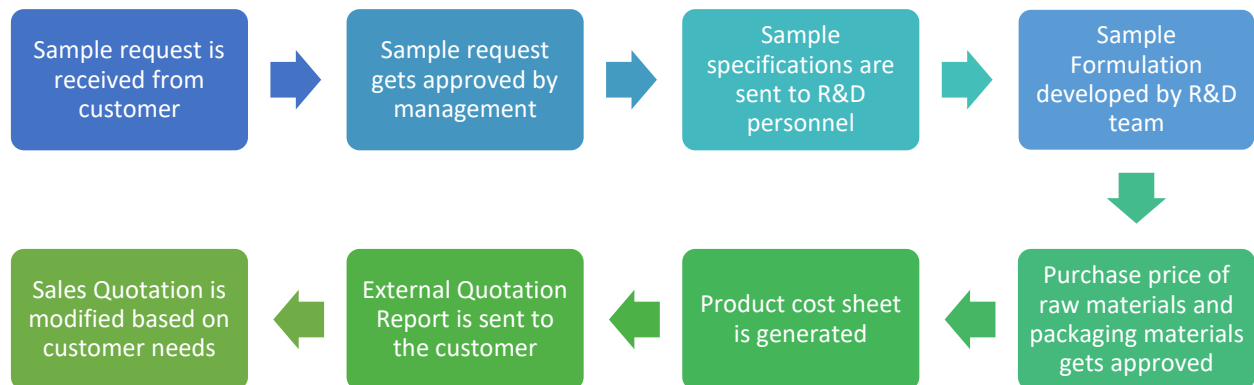
BatchMaster ERP's Sales Request Management feature is designed specifically to systematize, streamline, and speedup the sales process. It assists you in managing your sales project from opportunity to sales closure. Using this feature, you can efficiently manage new sales requests and can also make changes in existing sales requests. In addition, you can add project details, sample information, and other product development activities. This gives you better visibility on the progress of request. You can also generate formal quotation for customers, view pricing information of raw materials and packaging materials, and print a product cost sheet for samples.

1. Customer sends you a sales quotation request. This request may require you to develop sample product with specific formulations /specifications.
2. Sales team creates a record for the customer request and enters customer details.
3. Sales team gets approval from appropriate authorities to proceed with the sales quotation request.
4. After obtaining approval, the sales team asks the formulator to provide them with product's formula, developed based on customer specifications. In addition, they request for other details about the formula such as claim quantity, overage, potency, batch size, and packaging details.
5. R&D personnel/ formulators send the required information to the sales department.

6. Sales department adds packaging information, if not provided by R&D Personnel /formulator, and requests price approval from the purchasing department.
7. Purchasing department checks the price of all raw materials and packaging materials and updates the requested items' price based on volume. They send this information back to the requester (sales department).
8. Sales department then generates the product cost sheet and gets it approved by appropriate authorities.
9. Once approved, sales department sends the quotation with sample, to the customer.
10. Sales team negotiates with the customer and if approved, generates the sales order.
11. There can be exceptions to the above sequence of events (requirement). If the customer demands quotation for existing formulation (with no sample request) with some changes in the packaging material, then the sales department gets price approval from the purchase department and generates an internal quotation. Once this quotation is approved, they make an external quotation.

SRM Process Flow

BatchMaster ERP provides you the *Product Development* screen to record a customer request.



10.3 Product Development

Using the *Product Development* screen, you can efficiently record and track the sample development life cycle. Here you can record project details, sample information, and other development activities of a product. This will provide better visibility on the progress of sample request. Also, you can view pricing details of product components, print product cost sheets, and generate a quotation for your customer.

Go To: Sales Request Management → Product Development

The screenshot shows the 'Product Development' window in BatchMaster ERP. The 'Request Type' dropdown menu is highlighted with a red box, showing options: 'New Project Request', 'New Project Request', and 'Change Request'. The 'Customer Information' tab is active, displaying fields for Business Partner Code (lv001), Business Partner Name, Tel 1, Tel 2, Mobile, Fax, E-Mail, Web Site, and Sales Employee (-No Sales Employee-). Below this, there are sections for 'Bill To' and 'Ship To' addresses, including fields for Address, Address Name 2, Address Name 3, Street/PO Box, Block, City, Zip Code, County, State, and Country. The 'Ship To' section is pre-filled with '99, B11, Chikla' for Address ID, 'R2 Road' for Address Name 2, and 'Uruguay' for Country. At the bottom, there are 'Update' and 'Cancel' buttons.

For a new sample request, you can enter the *Request Type* as *New Project Request*, while if you need to modify any existing request you can choose the *Change Request* option.

On the *Customer Information* tab you can recall and display a *Business Partner* already maintained on the *Business Partner Master Data* screen, or can directly define a new one. You can also maintain *Bill To/Ship To* details. When you close the project, the details will be automatically updated on the *Business Partner Master Data* screen.

On the *Project Details* tab, you can store basic details of a project. If the project request reaches through a sales opportunity, then enter the opportunity number in the corresponding field. Also, you can enter the user who is responsible for this project in the *Owner* field and set the urgency level of the project using the *Priority* dropdown.

Click the *Add* button to add the recorded sample request. By default, the project status is set to *New (Sample Development)*. Now, the sales team will look for approval from appropriate authorities, before proceeding with the quotation. At this phase, you should set the project status as *Approval to Create Sample*. When you update the record, an activity for the approval of the sample development will be created and will be assigned to the user specified in the *Activity Assigned To* field.

Once the sample creation is approved by the responsible sales personnel, the corresponding activity can be closed and the project owner can change the project status to *Request for Formula Development*. By doing so, a new activity for sample formulation will be created and assigned to the user specified in the *Activity Assigned To* field.

As a formulator, you can prepare the formula using the *Physical Property Analysis* screen.

Physical Property Analysis

Formula: Turmeric Capsule FG Code: Status: Experimental

Description: Turmeric Capsule Project Id: Refrest Price Send For Approval

Revision: 0000000003 Product Type: Owner: manager

RM Cost By: Price List 01 Customer Code: Toggle to System Unit:

Batch Size: 0.000 Calculate Cost Calculate Batch Qty.

Intermediate Cost By: Price List 01

#	Mark	Type	Label Claim	Claim Quantity	Claim Unit	Item Code	Item Description	WT %	Vol %	Quantity in Stock
1	<input type="checkbox"/>	Material		0.000		Omega3	Omega3	34.914	34.914	
2	<input type="checkbox"/>	Material		0.000		BEEESWAX	BEEESWAX	0.431	0.431	
3	<input type="checkbox"/>	Material		0.000		D-Glucoamine	D-Glucoamine	21.767	21.767	
4	<input type="checkbox"/>	Material		0.000		Turmeric	Turmeric	23.491	23.491	
5	<input type="checkbox"/>	Material		0.000		Chondroitin Supplphate	Chondroitin Supplphate	14.655	14.655	
6	<input type="checkbox"/>	Material		0.000		Soyabean Oil	Soyabean Oil	4.741	4.741	
7	<input type="checkbox"/>	Material		1.000		GLYCERYL	GLYCERYL	0.000	0.000	
8	<input type="checkbox"/>	Material		0.000				0.000	0.000	
								99.999	99.999	

Total Serving Size: 1.000

Material Cost: 0.00
Labor Cost: 0.00
Total (KG): 0.464 (L): 0.464
Cost Per (KG): 0.00 (L): 0.00

View Complete Formula

Once the sample formula is ready with an *Active* status in the *Physical Property Analysis* screen, then you must close the corresponding activity. Once the activity is closed the system will update the created formula on submitted formula.

Activity

Type: General
 Subject:
 Assigned To: User manager
 Assigned By:
 Personal

BP Code:
 BP Name:
 Contact Person:
 Telephone No.:

General | Content | Linked Document | Attachments

Remarks:
 Start Time: 03/23/18 5:33PM
 End Time: 03/23/18 5:48PM
 Duration: 15 Minutes
 Priority: Normal
 Meeting Location:
 Recurrence: None
 Formula Id:
 Formula Description:
 Revision No.:

Reminder 15 Minutes
 Inactive
 Closed
 Follow Up

Add Cancel

As a result, the project status on the *Product Development* screen changes to *Formulation Complete*.

Product Development

Project Id: Manual PJT000003 Project Date: 03/23/18
Revision No.: 000000001 Close Date:

Request Type: New Project Request
Status: Formulation Complete
Activity Assigned To:

Customer Information Project Detail Sample Information General Information Other Information Attachments

Sample Summary: Produce a sample for approval Sample Size:

Sample Description: Ingredients Omega3, BEESWAX, D-Glucoamine, Turmeric, Soyabean

Template Id: ST001

#	Specification Group	Specification Id	Unit	Test Category	Test Method	Measuring	Lower Limit	Upper Limit	Target Value	Target Alpha
1	0	S001		0	PassFail		0.000	0.000	0.000	

OK Cancel

Next, on the *General Information* Tab, you can enter the *Base formula* and *Packaging BOM* that should be used for the sample product. The *Base formula* field is editable when status of product development is *Request For Formula Development*. Additional data can later be added about the submitted product.

Product Development

Project Id: Manual PJT000003 Project Date: 03/23/18 Request Type: New Project Request
Revision No.: 000000001 Close Date: Status: Formulation Complete
Activity Assigned To:

Customer Information Project Detail Sample Information General Information Other Information Attachments

New Product Development /Change Request

Base Formula: Turmeric Capsule
Formula Description: Turmeric Capsule
Revision No.: 000000001
Packaging BOM:
Revision No.:
Comments: Sample Product not for sale. To be presented for product and price approval process.

Submitted Product

Formula Submitted:
Formula Description:
Revision No.:
Packaging BOM:
Revision No.:
Comments:

OK Cancel

Additional sample-related information can be entered on the *Other Information* tab.

You can use the *Attachment* tab to attach any supporting file or document with the project. You need to ensure that the document is available in a network location.

The screenshot shows the 'Product Development' window with the following details:

- Project Id:** Manual (dropdown), PJT000003
- Project Date:** 23/03/18
- Request Type:** New Project Request
- Revision No.:** (empty)
- Close Date:** (empty)
- Status:** Formulation Complete
- Activity Assigned To:** (empty)

The **Attachments** tab is active, displaying a table with the following data:

#	Source Path	Target Path	File Name	Attachment Date
1	\\Eworkplace\temp		net.pdf	14/11/18

Buttons for **Browse**, **Display**, and **Delete** are located to the right of the table. At the bottom of the window, there are **Add** and **Cancel** buttons.

Through the *Purchase Price Approval Dashboard*, the purchasing manager can select the desired price list in the *Cost By* field and quote the price of materials.

Go To: Purchasing → Purchase Price Approval Dashboard

Purchase Price Approval Dashboard

Project Id: Status:

#	Line Type	Item Code	Description	Quantity	Whse Code	Cost By	Price	Amount
1	Formula Item	Ω Omega3	Omega3	0.162	01	Price List 01	7.00	0.00
2	Formula Item	BEEWAX	BEEWAX	0.002	01	Price List 01	2.00	0.00
3	Formula Item	D-Glucoam	D-Glucoamine	0.101	01	Price List 01	5.00	0.00
4	Formula Item	Turmeric	Turmeric	0.109	01	Price List 01	8.00	0.00
5	Formula Item	Chondroitin		0.068	01	Price List 01	2.00	0.14
6	Formula Item	Soyabean (Soyabean Oil		0.022	01	Price List 01	5.00	0.00
7	Formula Item	GLYCERYL	GLYCERYL	0.024	01	Price List 01	1.00	0.00

Once the material prices are approved, then you can close the corresponding activity for price approval. As a result, the project status on the *Product Development* screen changes to *Purchase Price Approved*.

Product Development

Project Id: PJT000003 Project Date:
 Revision No.: Close Date:

Request Type:
 Status:
 Activity Assigned To:

Customer Information | Project Detail | Sample Information | General Information | Other Information | Attachments

Project Description:

Sales Opp.:

Internal Notes:

Owner:
 Requester:
 Priority:

You can define packaging of a sample manually or you can copy the BOM assembly items or container items. To accomplish this, right-click on the *Product Development* screen and select the option *Packaging Details*.

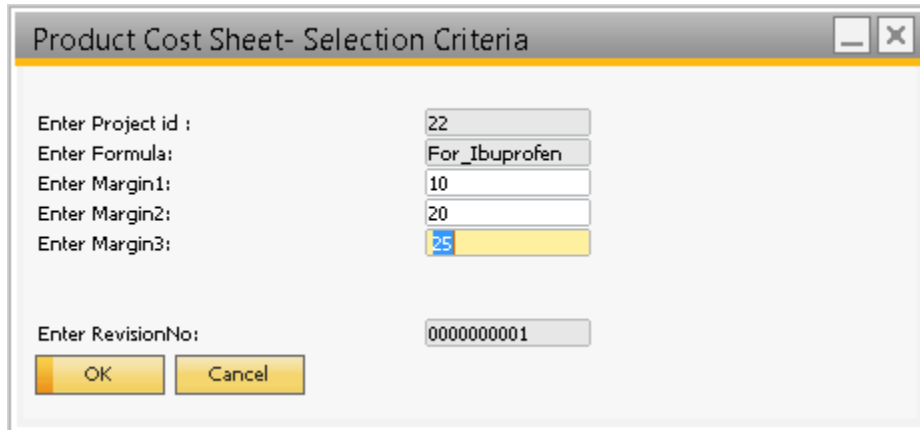
On the *Packaging Details* screen, you can manually enter packaging details of your sample or else select the Copy from BOM/Container BOM. Additionally, you can also use *Default Cost Group* drop-down menu to set the default price list that can be used to print the *Product Cost Sheet*.

#	SeqNo	Item Code	Whse Code	UOM	Quantity	Stock UOM	Quantity St...	Price
1	1	⇒ PKG001	⇒ 01	⇒ EACH	150.00	⇒ EACH		0.00
2	2							

You can view the purchase price information of formula ingredients using the *View Price Information* option (right-click to display.)

#	Line Type	Item Code	Description	Quantity	Whse Code	Price	Amount
1	Formula Item	⇒ Omega3	Omega3	0.162	⇒ 01	0.00	0.00
2	Formula Item	⇒ BEESWAX	BEESWAX	0.002	⇒ 01	0.00	0.00
3	Formula Item	⇒ D-Glucoami	D-Glucoamine	0.101	⇒ 01	0.00	0.00
4	Formula Item	⇒ Turmeric	Turmeric	0.109	⇒ 01	0.00	0.00
5	Formula Item	⇒ Chondroitir	Chondroitin Sulfate	0.068	⇒ 01	0.00	0.00
6	Formula Item	⇒ Soyabean	Soyabean Oil	0.022	⇒ 01	0.00	0.00
7	Formula Item	⇒ GLYCERYL	GLYCERYL	0.024	⇒ 01	0.00	0.00
8				0.000		0.00	0.00

Before preparing the sales contract, a sales manager will need the statement of cost incurred in sample preparation. You can generate a cost sheet using the *Product Cost Sheet* screen, which can be accessed by right-clicking on the *Product Development* screen and choosing the option *Product Cost Sheet*.

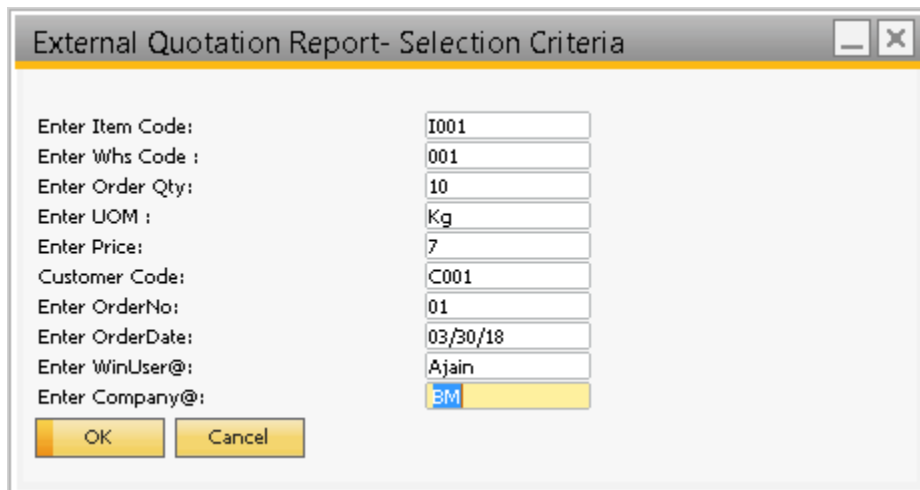


The screenshot shows a dialog box titled "Product Cost Sheet- Selection Criteria". It contains several input fields with the following values: "Enter Project id :" is 22; "Enter Formula:" is For_Ibuprofen; "Enter Margin1:" is 10; "Enter Margin2:" is 20; "Enter Margin3:" is 25; and "Enter RevisionNo:" is 000000001. There are "OK" and "Cancel" buttons at the bottom.

The total cost displayed on the Product Cost Sheet report will include the Labor cost (Formula Labor + Fixed Cost Labor + Setup Cost Labor) defined for the formula.

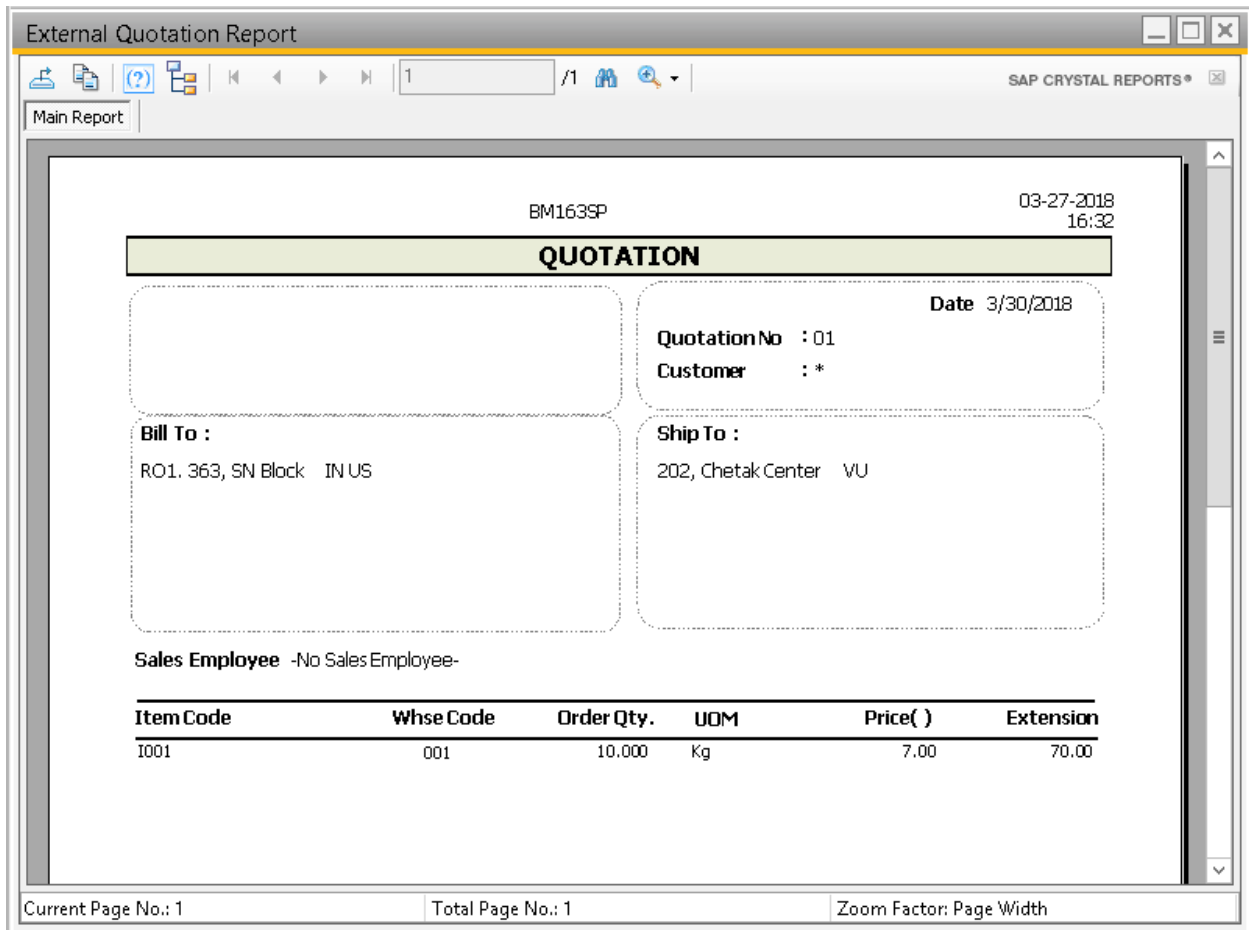
Once the sales manager approves the cost sheet, you must close the corresponding activity. As a result, the project status on the *Product Development* screen changes to *Price Cost Sheet Approved*.

Finally, the sales department will need to send a quotation to the customer/prospect. To generate the quotation, right-click on the *Product Development* screen and choose the option *External Quotation*.



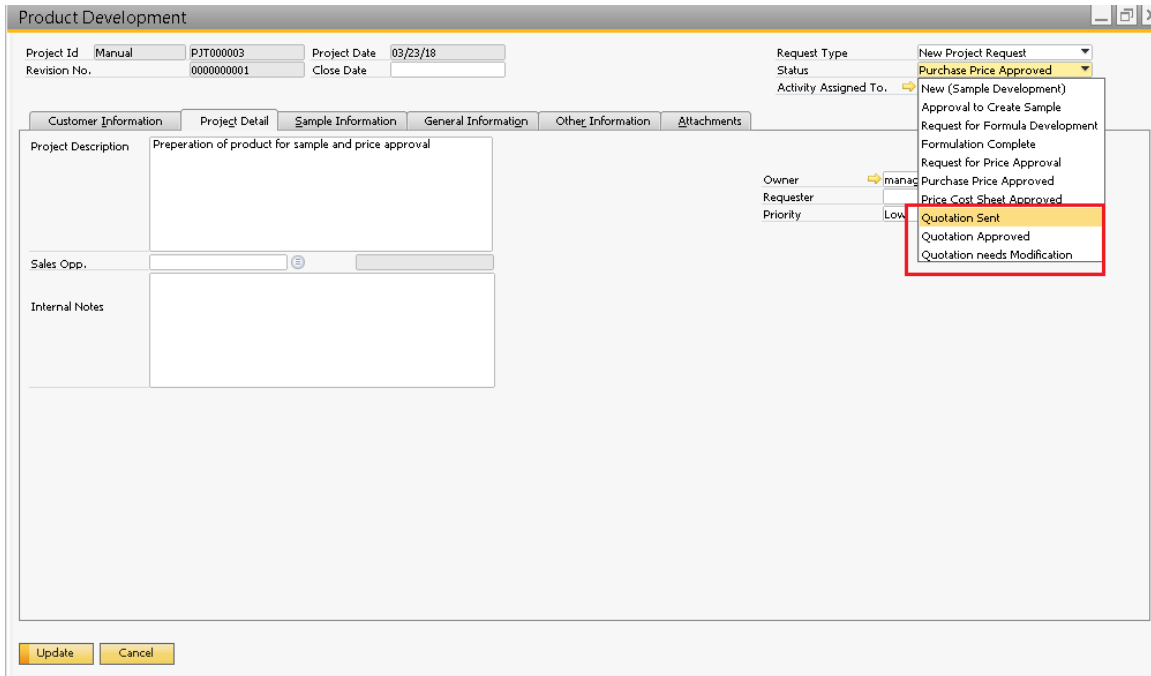
The screenshot shows a dialog box titled "External Quotation Report- Selection Criteria". It contains several input fields with the following values: "Enter Item Code:" is I001; "Enter Whs Code :" is 001; "Enter Order Qty:" is 10; "Enter UOM :" is Kg; "Enter Price:" is 7; "Customer Code:" is C001; "Enter OrderNo:" is 01; "Enter OrderDate:" is 03/30/18; "Enter WinUser@:" is Ajain; and "Enter Company@:" is BM. There are "OK" and "Cancel" buttons at the bottom.

Using this screen, you can enter the desired pricing for the customer and generate the report. The project person can generate and send external quotation based on the quoted price from the last sent quotation to the customer. The quotation report generated appears as in the following screen.



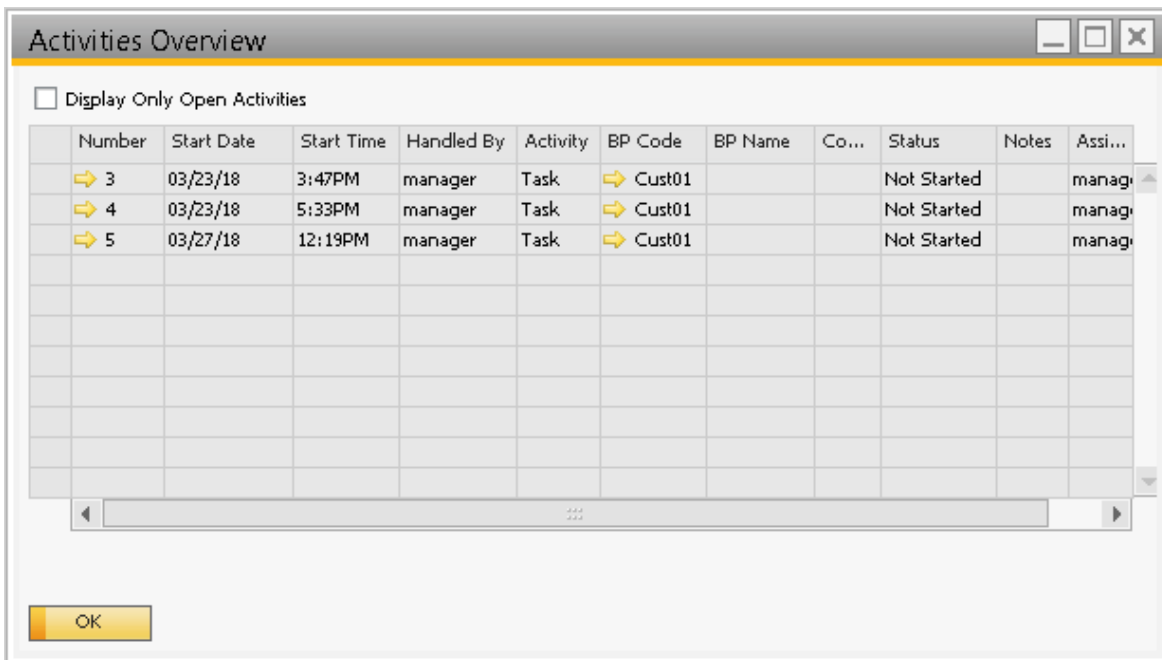
At this stage, you can set the project status to *Quotation Sent*.

If the customer/prospect approves the quotation and is ready to place an order, then the project owner can set the project status to *Quotation Approved*. If the customer needs modifications to the quotation, then you need to set the project status to *Quotation needs Modification*. In this case, the entire product development cycle needs to be repeated from *Approval to create the sample to Quotation sent*.



During the entire project development process, BatchMaster ERP automatically creates activities as and when needed. To access the Activity screen, right-click on the *Product Development* screen and choose the option *New Activity*.

Activities that have been added already for a product development process can be viewed by choosing the *View Related Activity* option from the right-click menu of the *Product Development* screen.



If the Product Development record is associated with a sales opportunity you can also view project details on the *Opportunity* Screen. On this screen, the *Projects* tab shows all the sample project records created against the sales opportunity. The hyperlinks provided within various fields help you to easily navigate to specific records and view their details.

Opportunity

Opportunity Type: Sales Purchasing

Business Partner Code: Cust01
 Business Partner Name: *
 Contact Person: [Dropdown]
 Total Amount Invoiced: [Field]
 Business Partner Territory: [Field]
 Sales Employee: -No Sales Employee-
 Owner: [Field]

Opportunity Name: OPP001
 Opportunity No.: 1
 Status: Open
 Start Date: 03/28/18
 Closing Date: [Field]
 Open Activities: [Field]
 Closing %: 10%

Display in System Currency

Potential	General	Stages	Partners	Competitors	Summary	Attachments	Projects		
#	Project Id	R...	Request Type	Status	Priority	Business...	S...	Base Formula Id	Base...
1	001	00000	New Project Request	Request for	High	Cust01	Test Te	MMS	Mango
2	PJT000003	00000	New Project Request	Purchase P	Low	Cust01	Produ Ir	Turmeric Capsu	Turmeri
3	001	00000	New Project Request	Formulation	Low	Cust01	fd	Turmeric Capsu	Turmeri

Buttons: OK, Cancel, Related Activities, Related Documents

You can cancel the Sample request any time just by setting its status as *Cancelled*. Setting this status disables the record and so you cannot work on it further.

Product Development

Project Id: Manual | PJT000003 | Project Date: 23/03/18 | Request Type: New Project Request
 Revision No.: [Field] | Close Date: [Field] | Status: New (Sample Development)
 Activity Assigned To.: [Field]

Customer Information | Project Detail | Sample Information | General Information | Other Information

#	Source Path	Target Path	File Name	Attachment Date

Dropdown Menu (Status):
 New (Sample Development)
 Approval to Create Sample
 Request for Formula Development
 Formulation Complete
 Request for Price Approval
 Purchase Price Approved
 Price Cost Sheet Approved
 Quotation Sent
 Quotation Approved
 Quotation needs Modification
 Cancelled

10.3.1 Product Development Dashboard

The Product Development Dashboard is specifically designed to track and analyze the progress of sample requests. You can view sample requests along with their status, and perform different operations such as: view/modify pricing of raw materials and packaging materials; open the Purchase Price Approval dashboard; print a product cost sheet for samples; generate formal quotations for customers. Hyperlinks are provided to easily navigate to particular details.

Go To: Process Manufacturing → Production Utilities → Product Development Dashboard

From the left pane, you can apply suitable filter criteria and click the *Get Data* button. The sample projects fulfilling the criteria you specify will be displayed in the dashboard grid.

In the grid you can view all details of the project such as Project id, revision number, status, requestor, request type, project date, owner, Base formula and packaging details, sales opportunity number if the project is created against any opportunity. In the lower grid, you can view project General Information, sample information, Related Activities and Attachments details.

From the dashboard you can perform the following business operations:

- Print Product Cost sheet
- Print external quotation report
- Change project status
- Close projects
- Open the purchase price approval dashboard
- Open packaging detail
- View price information

10.4 Quality Control Samples

Based on the regulatory norms set by the FDA and ICH, there could arise a need to track the quantity of raw materials drawn from multiple material lots received in different containers. Typically, any organization with such a need should set sampling standards. These standards can then be used while drawing samples for performing quality tests on raw materials.

Before you draw samples, you need to perform a series of steps beginning with the *Quality Control Samples* screen.

Go To: Administration → Setup → Quality Control Setup → Quality Control Samples

#	Quantity From	Quantity To	Number of Samples
1	1.000	1,000,000	5

Use the table in the screen to set the number of samples to be drawn while performing quality control tests on lots that are received in different containers. Also, as part of the prerequisites to draw quality control samples, create a QC control order for the item for which samples need to be drawn.

Create an item using *Item Master Data*. Provide the costing method for the item. The available choices for the costing method are: *FIFO*, *FEFO*, and *LIFO*.

Additionally, in the *Quality Control* tab of the *Item Master Details* screen, enter the quality control test, and select the checkbox for the *Inventory QC* option to perform quality control tests on the item.

Item Master Details

Item Number → Omega 3
 Description Omega 3
 Alternate Desc _____ GTIN _____

Inventory Quality Control UoM Conversion Batch Options

Inspection Required
 Automatically create QC order on receipt
 Default Lot Status while receiving _____ Compare Revisions Copy from Specifications
 QC Revision _____
 Stability Test Plan _____
 Sample Plan ID _____

#	rks	Purchase QC	Production QC	Sales QC	Inventory QC	Stability QC
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Business Partner Wise Test

Update Cancel

Receive lots for this item.

Now, go to *Quality Control - QA*, *Quality Control - User*, or *Quality Control – QC* and create a quality control order for the item which you have received. For example, we have taken the *Quality Control Order – QC* screen. Create an inventory-type quality control order for the item, by selecting the required options from the screen.

Quality Control Order - QC

QC No. Reference Doc. No. No.
 QC Type Reference Doc. Type BP Code
 Status Owner
 Req Date Notes
 Completed Date

#	Item Code/F...	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty
1	Ω Omega 3	Omega 3		01	B45	700.000	0.000	0.000	0.000
2						0.000	0.000	0.000	0.000

Sample Set

Selected Item: Omega 3 Lot: B45

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit
1	1	color	color		0	0	Sampling	PassFail	0.000
2	2	color	color		0	0	Sampling	PassFail	0.000
3	3	color	color		0	0	Sampling	PassFail	0.000
4	4	color	color		0	0	Sampling	PassFail	0.000
5	5	color	color		0	0	Sampling	PassFail	0.000
6									0.000

Once the changes are saved, change the status of the Quality Control order from *New* to *Released*.

Quality Control Order - QC

QC No. Reference Doc. No. No.
 QC Type Reference Doc. Type BP Code
 Status Owner
 Req Date Notes
 Completed Date

#	Item Code/F...	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty
1	⇒ Omega 3	Omega 3		⇒ 01	B45	700.000	0.000	0.000	0.000
2						0.000	0.000	0.000	0.000

Sample Set

Selected Item: Omega 3 Lot: B45

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit
1	1	⇒ color	color		0	0	Sampling	PassFail	0.000
2	2	⇒ color	color		0	0	Sampling	PassFail	0.000
3	3	⇒ color	color		0	0	Sampling	PassFail	0.000
4	4	⇒ color	color		0	0	Sampling	PassFail	0.000
5	5	⇒ color	color		0	0	Sampling	PassFail	0.000
6									0.000

Perform the QC test, enter the test result obtained for the sample and *Update* the record. The QC Order status changes from *Released* to *In Process*.

Quality Control Order - QC

QC No. INV000017 Reference Doc. No. No. 0
 QC Type Inventory QC Reference Doc. Type BP Code
 Status In Progress
 Req Date 10/12/18 Owner manager
 Completed Date Notes

#	Item Code/F...	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty
1	Ω Omega 3	Omega 3		01	BO01	45,000	0.000	0.000	0.000
2						0.000	0.000	0.000	0.000

Sample Set ALL

Copy Test Results Duplicate Sample

Selected Item: Omega 3 Lot: BO01

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit
1	1	Ω COLOUR	COLOUR	L	FOOD	PHYSICAL	Sampling	PassFail	0.000
2	2	Ω COLOUR	COLOUR	L	FOOD	PHYSICAL	Sampling	PassFail	0.000
3									0.000

OK Cancel Evaluate QC Copy From

Now if you wish to keep a track of sample lot quantities used in QC, then BatchMaster ERP provides you options to *Draw QC Sample* and *Retain QC Sample*. If you draw the QC Sample lot then system will perform the Goods issue transaction for the drawn quantity. While if you Retain the QC Sample lot then the sample quantity will be transferred to specified warehouse.

Use the *QC Sample* Screen to perform the action. To access the screen

Go To: Quality Control → QC Sample

QC Sample

Process Type Sample Drawn

Transaction Id

QC Order No.

Item Code

Lot#

Lot Quantity 0.000 ...

Sample Qty Withdrawn 0.000 ...

No. of Containers

No. of Samples

Qty Per Sample 0.000

Total Sample Quantity 0.000 ...

HMIS Personal Protection

Posting Date

Warehouse

Description

Vendor Lot#

Lot Status

Expiry Date

#	From Whse	From Bin No.	Container #	Quantity	Sample Instructions

The *QC Sample* screen can either access directly from the *Quality Control Order-QA* screen, using the *Draw QC Sample/Retain QC Sample* button.

Quality Control Order - QA

QC No. INV000017

QC Type Inventory QC

Status In Progress

Req Date 10/12/18

Completed Date

Reference Doc. No.

Reference Doc. Type

No. 0

BP Code

Owner manager

Notes

#	Item Code/Formula ID	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty	QC Decision	QC Status	Item/Formula	Pass Warehouse	Da...
1	Omega 3	Omega 3	01	BO01	BO01	36.000	0.000	0.000	0.000	Not Tested	In Progress Item	03	03	
2						0.000	0.000	0.000	0.000	Not Tested				

Sample Set ALL

Selected Item: Omega 3 Lot: BO01

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit	Control Upper Limit	Numeric Value	Alpha Numeric Value	Results	Rem...
1	1	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass	
2	2	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass	
3									0.000	0.000	0.000			

If you open the *QC Sample* screen directly from the *Quality Control Order-QA* screen then sample details get auto filled on the basis of respective QC order. While, if you open the screen from the menu then the *Process Type* and *QC order* needs to be specified.

Draw QC Sample

Let's first perform the *Draw QC sample* of the sample lot used in QC. For this click on the *Draw QC Sample* button available on the *Quality Control Order QA* screen.

The screenshot shows the 'Quality Control Order - QA' interface. At the top, there are input fields for QC No. (INV00017), QC Type (Inventory QC), Status (In Progress), Req Date (10/12/18), and Completed Date. There are also fields for Reference Doc. No., Reference Doc. Type, No. (0), BP Code, Owner (manager), and Notes. A 'Sample Transactions' button is visible on the right.

#	Item Code/Formula ID	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty	QC Decision	QC Status	Item/Formula	Pass/Wareh
1	Omega 3	Omega 3		01	BO01	45.000	0.000	0.000	0.000	Not Tested	Released	Item	03
2						0.000	0.000	0.000	0.000	Not Tested			

Below the table, there is a 'Sample Set' dropdown set to 'ALL' and buttons for 'Copy Test Results' and 'Duplicate Sample'. A section titled 'Selected Item: Omega 3 Lot: BO01' contains another table:

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit	Control Upper Limit	Numeric Value	Alpha Numeric Value	Res
1	1	COLOUR	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
2	2	COLOUR	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
3									0.000	0.000	0.000		

At the bottom, there are buttons for 'OK', 'Cancel', 'Draw QC Sample' (highlighted with a red box), 'Retain QC Sample', 'QA Approval', 'Evaluate QC', and 'Copy F'.

On the *QC Sample* Screen, observe that the *Process Type* as *Draw QC Sample*, *QC Order number* and lot details get auto filled.

QC Sample

Process Type: Draw QC Sample Sample Drawn

Transaction Id:

QC Order No.:

Item Code:

Lot#:

Lot Quantity: KG

Sample Qty Withdrawn: KG

No. of Containers:

No. of Samples:

Qty Per Sample: KG

Total Sample Quantity: KG

HMIS Personal Protection:

Posting Date:

Warehouse:

Description:

Vendor Lot#:

Expiry Date:

#	From Whse	From Bin No.	Container #	Quantity	Sample Instructions
1	<input type="text" value="01"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.000"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

In the grid, specify the *Bin/Container No* and the *Quantity* of the sample lots needed to be drawn. Also, specify the *No of samples* in the respective field.

QC Sample

Process Type: Draw QC Sample Sample Drawn

Transaction Id:

QC Order No.: INV000017

Item Code: Omega 3

Lot#: BO01

Lot Quantity: 45,000 KG

Sample Qty Withdrawn: 5,000 KG

No. of Containers: 0

No. of Samples: 2

Qty Per Sample: 2,000 KG

Total Sample Quantity: 4,000 KG

HMIS Personal Protection:

Posting Date: 11/12/18

Warehouse: 01

Description: Omega 3

Vendor Lot#:

Lot Status: ALL

Expiry Date:

#	From Whse	From Bin No.	Container #	Quantity	Sample Instructions
1	01	01-SYSTEM-BIN-LC	0	4,000	
				4,000	

Add Cancel



The Lot Quantity field will show only that quantity of lots whose status will allow inventory transfer.

Click on the Add button. The system displays a message as below before withdrawing the sample quantity from the lot. Click on Yes to confirm.

System Message

This action will withdraw sample and deduct quantities from lot,Continue?

Yes No Cancel

The System will perform the Goods Issue transaction for the drawn lot quantity. You can view Sample Transaction details from the Quality Control Order QA screen.

Quality Control Order - QA

QC No. INV000017
 QC Type Inventory QC
 Status In Progress
 Req Date 10/12/18
 Completed Date

Reference Doc. No. No. 0
 Reference Doc. Type BP Code

Owner manager
 Notes Sample Transactions

#	Item Code/Formula ID	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty	QC Decision	QC Status	Item/Formula	Pass Warehouse
1	Omega 3	Omega 3		01	BO01	41.000	0.000	0.000	0.000	Not Tested	In Progress Item		03
2						0.000	0.000	0.000	0.000	Not Tested			

Sample Set ALL Copy Test Results Duplicate Sample

Selected Item: Omega 3 Lot: BO01

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit	Control Upper Limit	Numeric Value	Alpha Numeric Value	Results
1	1	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
2	2	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
3									0.000	0.000	0.000		

OK Cancel Draw QC Sample Retain QC Sample QA Approval Evaluate QC Copy From

QC Sample Transactions

#	Process Type	Transaction No	Item Code	Lot No	Quantity	Goods Issue No.	Inventory Transfer No.
1	Draw QC Sample	3	Omega 3	BO01	5.000	221	0
2	Draw QC Sample	4	Omega 3	BO01	4.000	222	0

OK Cancel

Goods Issue

Number 222 Series Primary Posting Date 11/12/18
 Document Date 11/12/18
 Price List Last Purchase Price Ref. 2

Contents Attachments

#	Item No.	Item Description	Quantity	Bin L...	Inventor...	Item Cost	U...
1	Omega 3	Omega 3	4	4	52300000	\$ 2.00	Manu

Remarks Created by QC Sample (Draw QC Sample)
 Journal Remark Goods Issue

OK Cancel

The Issue document *Posting Date* is the *Posting date* you specified on the *Draw QC Sample* screen.

Retain QC Sample

Retaining the QC Sample is helpful if you wish to keep the sample lot quantity at particular warehouse. Thus, to perform the *Retain QC sample* process you are required to specify an exact location where the sample lot will be transferred. For this, on the *QC Sample* screen, enter the *To warehouse* and *To Bin No.*



ANY QC Rejected lot will not be included when you perform the Retain Sample.

Quality Control Order - QA

QC No. INV000017
QC Type Inventory QC
Status In Progress
Req Date 10/12/18
Completed Date

Reference Doc. No. No. 0

QC Sample

Process Type Retain QC Sample Sample Drawn

Transaction Id

QC Order No. INV000017 Warehouse 01
Item Code Omega 3 Description Omega 3
Lot# BO01 Vendor Lot#
Lot Quantity 41,000 KG Lot Status ALL
Sample Qty Withdrawn 0,000 KG Expiry Date
No. of Containers 0
No. of Samples 5
Qty Per Sample 1,000 KG
Total Sample Quantity 5,000 KG
HMIS Personal Protection
Posting Date 11/12/18

#	From Whse	From Bin No.	Container #	Quantity	Sample Instructions	To Warehouse	To Bin No.
1	01	01-SYSTEM	0	5.000		04	04-SYSTEM-6

Selected Item: Omega 3 Lot: B001

#	Sample No	Test Code	Description	Test Unit
1	1	COLOUI	COLOUR	L
2	2	COLOUI	COLOUR	L
3				

Sample Set ALL

Buttons: OK, Cancel, Draw QC Sample, Retain QC Sample, QA Approval, Evaluate QC, Copy F

Click the *Add* button. The system displays a message as below before withdrawing the sample quantity from the lot. Click *Yes* to confirm.

System Message

This action will withdraw sample and deduct quantities from lot, Continue?

Buttons: Yes, No, Cancel

The System performs an inventory transfer of the *QC sample* lot to the specified warehouse bin location. You can view *Sample Transaction* details from the *Quality Control Order QA* screen.

Quality Control Order - QA

QC No. INW000017
 QC Type Inventory QC
 Status In Progress
 Req Date 10/12/18
 Completed Date

Reference Doc. No. No. 0
 Reference Doc. Type BP Code

Owner manager
 Notes

Sample Transactions

#	Item Code/Formula ID	Description	Revision No	Warehouse	Lot	Test Qty	Accepted Qty	Rejected Qty	Scrapped Qty	QC Decision	QC Status	Item/Formula	Pass Warehouse
1	Omega 3	Omega 3		01	BO0	41.000	0.000	0.000	0.000	Not Tested	In Progress Item		03
2						0.000	0.000	0.000	0.000	Not Tested			

Sample Set ALL

Selected Item: Omega 3 Lot: BO01

#	Sample No	Test Code	Description	Test Unit	Category	Test Method	Inspection	Measuring	Control Lower Limit	Control Upper Limit	Numeric Value	Alpha Numeric Value	Results
1	1	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
2	2	COLOUI	COLOUR	L	FOOD	PHYSICAL	Sampling	Pass/Fail	0.000	0.000	0.000		Pass
3									0.000	0.000	0.000		

OK Cancel Draw QC Sample Retain QC Sample QA Approval Evaluate QC Copy From

QC Sample Transactions

#	Process Type	Transaction No	Item Code	Lot No	Quantity	Goods Issue No.	Inventory Transfer No.
1	Draw QC Sample	3	Omega 3	BO01	5.000	221	0
2	Draw QC Sample	4	Omega 3	BO01	4.000	222	0
3	Retain QC Sample	5	Omega 3	BO01	5.000	0	82

Inventory Transfer

Business Partner
 Name
 Contact Person
 Ship To

Number 82
 Series Primary
 Posting Date 11/12/18
 Document Date 11/12/18

From Warehouse 01
 To Warehouse 04
 To Bin Location
 Price List Last Purchase Price

Contents

#	Item No.	Item Description	From...	From Bin Loc...	To Ware...	To Bin Locations	First To...
1	Omega 3	Omega 3	01	5	04	5	04-SYST

Sales Employee

Journal Remarks Inventory Transfers

Remarks Created by QC Sample (Retain QC Sample)

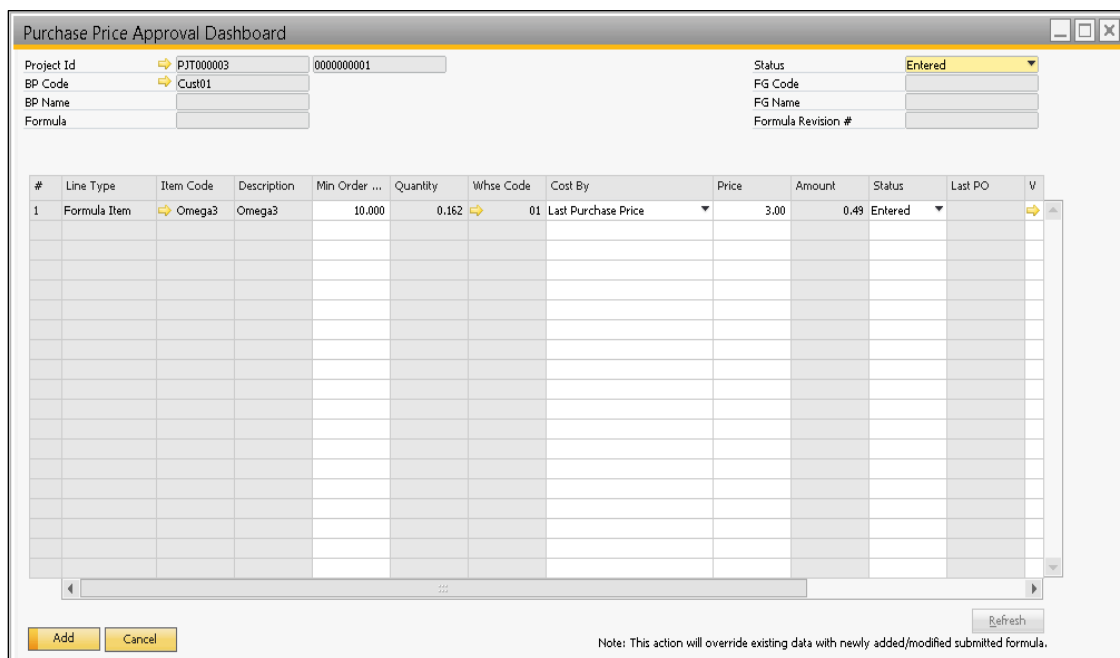
11 Purchase Price Approval Dashboard

Once you have added formula and packaging details on the *Product Development* screen, you need to prepare a purchase price list for the formula ingredients and the packaging materials and get it approved. You can do so using the *Purchase Price Approval Dashboard*. You can access the screen directly from the Purchase-A/P module or open it from the *Go To* menu of the *Product Development* screen.

On the dashboard, select the sample whose purchase price list should be approved. You can observe that the raw materials and packaging materials along with prices appear on the dashboard.

Your purchasing manager can review the price of materials on this dashboard and approve individual material cost as well as the entire price list.

Go To: Purchase – A/P → Purchase Price Approval Dashboard



#	Line Type	Item Code	Description	Min Order ...	Quantity	Whse Code	Cost By	Price	Amount	Status	Last PO	V
1	Formula Item	Omega3	Omega3	10.000	0.162	01	Last Purchase Price	3.00	0.49	Entered		

On the *Purchase Price Approval Dashboard*, select the *Status* of the purchase price approval. The status indicates whether or not the purchase price list has been approved.

The *FG Code/Name* are defaulted from the Project.

The grid or the table stores cost details of individual items required in making the sample. Using the *Cost By* field, you can define the price list that decides the cost of each item, choose the *Last Purchase Price*, *Last Evaluated Price* or *Item Cost* option.

Alternatively, you can manually enter the price of the item, in the *Price* field. For lab items, the approved price will be updated on the *Physical Property Analysis* screen, and when posted by converting the experimental formula to development it is reflected on the formula as well.

Based on *Quantity* and *Price*, system will automatically calculates the product of two and displays the value as the total price of the item, in the *Amount* field.

Next, enter the *Status* of the price approval for every item. This status is different from the *Status* in the header, which indicates the status of purchase price approval for the sample, in whole. The available statuses are: *Entered*, *Hold*, and *Approved*.

You can directly drill down to the Purchase Order from the Last PO # field.

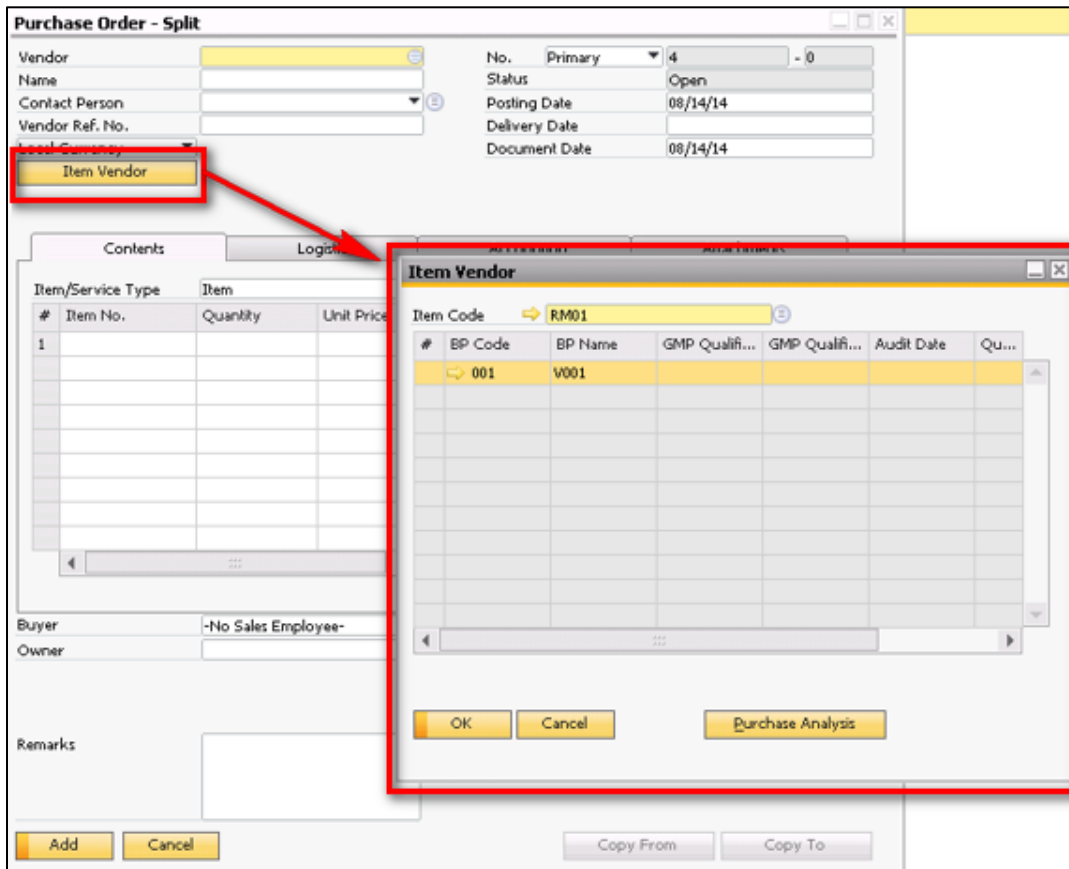
Finally, you can enter the unique identification code of the vendor who has quoted this price for the item, in the *Vendor Code* field. This option provides you a lookup of approved vendors or all vendors based on the setup option.

Use the *Refresh* button to refresh the prices approved for the Base Formula with the prices of the newly submitted formula (if submitted on the Product Development Screen).

Click the *Update* button to save the changes. As soon as purchase price of sample is approved and you close the respective activity, the status of the sample request changes to *Purchase Price Approved*.

11.1 Buying from an Approved Vendor

Use the Item Vendor button on the Purchase Order screen to spot approved vendors from whom the item can be purchased. Clicking this button displays the Item Vendor screen, which facilitates you to get the list of approved vendors for the selected item as maintained on the Business Partner Catalog numbers screen.



When you choose the desired vendor-item combination from the screen, the item details get auto-populated in the grid of the *Purchase Order* screen.

12 Third Party Manufacturing

Third Party manufacturing, also known as sub-contracting or outsourcing, can provide the following benefits:

- Free up capacity for other manufacturing needs
- Provide additional capacity during periods when demand exceeds your ability to supply product
- Take advantage of specialized processing and/or testing capabilities at the sub-contractor
- Potential lower cost per unit than if you make the item in-house
- Integration of labor costs and their impact on finished goods (FG) costs

Like most business opportunities, sub-contracting presents some risks:

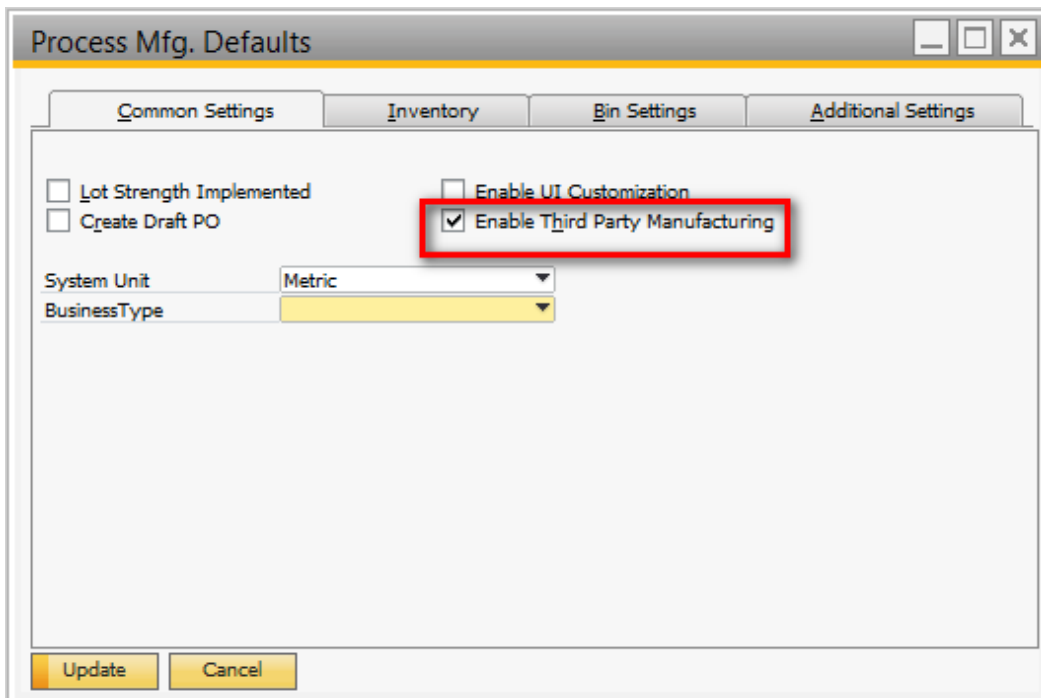
- Loss of control: it's difficult to track off-site production
- Capacity at the sub-contractor may not be available when you need it
- Potential quality and delivery issues
- Exposure of your product and formula to outside parties

The bottom line is you must establish and maintain a relationship of trust and communication.

12.1 Set-up Steps: Defaults

On the process manufacturing defaults screen, enable third party manufacturing by checking the box, then click UPDATE to save your work.

Go To: Administration → Setup → System Initialization → Process Mfg. Defaults



The screenshot shows the 'Process Mfg. Defaults' window with the following settings:

- Lot Strength Implemented
- Create Draft PO
- Enable UI Customization
- Enable Third Party Manufacturing (highlighted with a red box)
- System Unit: Metric
- BusinessType: [Dropdown menu]

Buttons at the bottom: Update, Cancel

Go To: Administration → Setup → Production → Production Defaults.

The screenshot shows the 'Production Defaults' dialog box with the following fields and options:

- Batch Options:**
 - Check Yield% while Closing Batch
 - % Yield Fluctuation Allowed while Closing a Batch: 0.000
 - WIP Account for Assembly/Fill Batch: [Empty]
 - FG Variance Account for Assembly/Fill Batch: [Empty]
 - WIP Rounding Variance Account: 525000000100101
 - Default Production Warehouse: 01
 - Default Batch Type: Mix
 - Require Labor Entry
 - Rollup Labor in Production
 - Default Process ID: STAGE01
 - Calculate FG per unit cost on Part Close by: [Empty]
 - Ask for confirmation before part closing/full closing a batch
 - User Defined Dates
 - BackFlush labor
 - Show All Finished Goods
 - Show Co-Product/EG Template
 - Process Cell Capacity is based on: Finished Good Yield
 - Allocate Lots to SO on Part Close/Full Close
- Batch Series:**
 - Define Series: [Button]
 - Production Series: s
 - MPS Series: [Empty]
 - MRP Series: [Empty]
 - SO Series: [Empty]
- ByProduct Costing:**
 - Use Standard Cost
 - Use BatchMaster Theoretical Cost
- Third Party Manufacturing (highlighted):**
 - Batch Start and Inv. Transfer Request Due Date Diff.: 0
 - Service Account Number: 111000000100101
 - Auto Part Close Batch when Material is received from contractor

Batch Start and Inv. Transfer Request Due Date Diff: As part of third-party manufacturing, you will create an inventory transfer request to move items from your warehouse to the sub-contractor's warehouse. At the production defaults screen, you instruct the system whether the inventory transfer request is due on the batch start date or the day before.

Service Account Number: Enter the account number for Service PO Liabilities (or a similar description)

Auto Part Close Batch when material is received from contractor: Leave this option unchecked if you want to use the Third Party Dashboard functionality.

Click UPDATE to save your work.

12.1.1 Business Partner Setup

Define the contract manufacturer as a vendor in the Business Partner records.

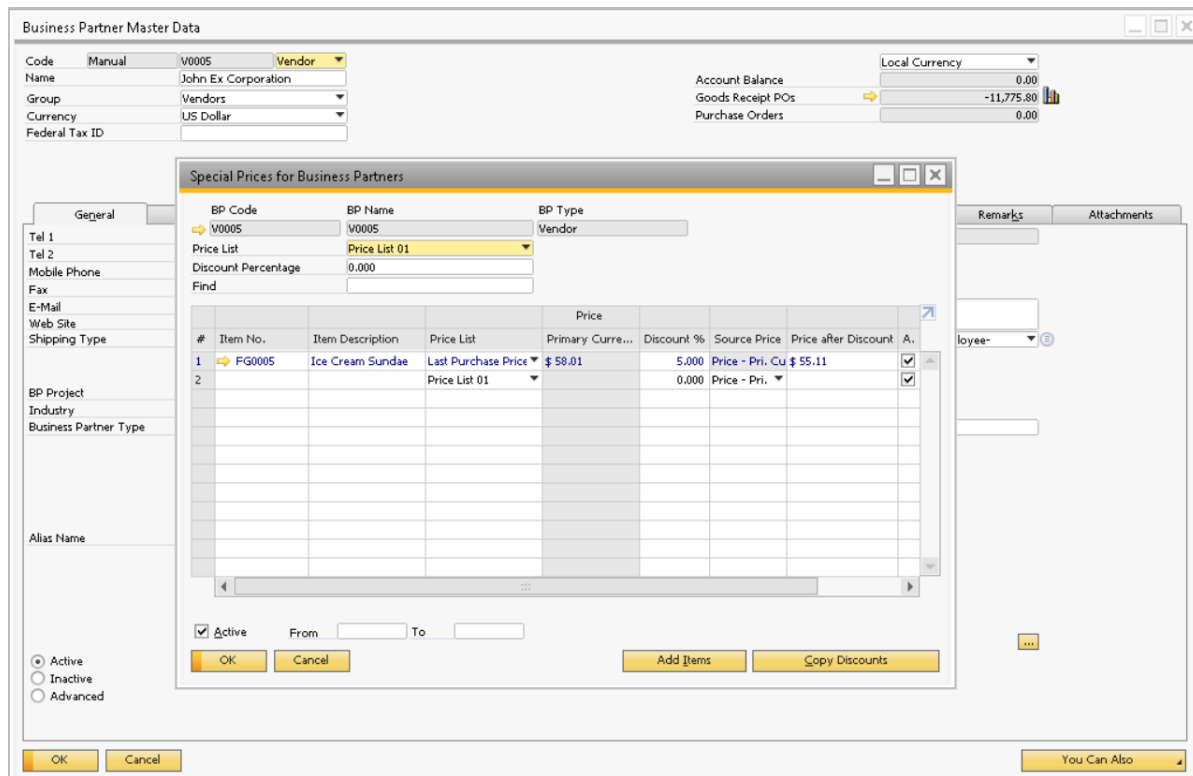
Go To: Business Partners → Business Partner Master Data.

The screenshot shows the 'Business Partner Master Data' form in SAP. The form is divided into several sections:

- Header Section:** Contains fields for Code (Manual, V0005, Vendor), Name (John Ex Corporation), Group (Vendors), Currency (US Dollar), and Federal Tax ID. On the right, there are summary fields: Account Balance (Local Currency, 0.00), Goods Receipt POs (-11,775.80), and Purchase Orders (0.00).
- Navigation Tabs:** General, Contact Persons, Addresses, Payment Terms, Payment Run, Accounting, Properties, Remarks, Attachments.
- General Tab:** Includes fields for Tel 1, Tel 2, Mobile Phone, Fax, E-Mail, Web Site, Shipping Type, BP Project, Industry, Business Partner Type (Company), and Alias Name.
- Properties Section:** Includes Contact Person, Remarks, Buyer (-No Sales Employee-), and Territory.
- Footer Section:** Includes radio buttons for Active, Inactive, and Advanced; a 'Block Sending Marketing Content' checkbox; and a 'You Can Also' dropdown.

12.1.1.1 Special Prices For Business Partner

The Special Prices for BP section allow users to map vendors with FG, while the Period Discounts pop-up enables defining service charges for a specific date range. The Volume Discount configuration further allows users to set quantity-based service charges using the Special Price field (SAP standard), ensuring a structured and scalable pricing approach.



If *Consider Special BP Price* checkbox is selected on the *Third Party* Tab of *Bill of Material* screen, the system allows you to associate special pricing with the Vendor linked to the third-party warehouse. This special pricing is applied to the labor cost during batch entry and impacts the standard cost upon batch close.

Thus, while closing the production batch, the system automatically calculates third-party service costs based on the posted and updated Service GRPO. It then posts a journal entry (JE) for the service charge, updates the FG unit cost by incorporating the service cost, and clears the work-in-progress (WIP) account, ensuring all costs are transferred to the FG account.

12.1.1.2 Period Discounts

In SAP Business One (SAP B1), managing Period Discounts for a Business Partner (BP) enables time-based special pricing for customers or vendors.

This screen allows mapping service charges by date and quantity using Special BP Partner pricing and defined Period Discount.

To configure this, navigate Business Partners Master Data. Maintain the data for the Vendor and from the context Menu, select Special Prices For Business Partner Option to maintain price list and select the relevant FG item. Double-click to open the Period Discounts window and define the Valid From and Valid To dates along with the discount percentage or Price After Discount. For Volume Discounts, double-click on a specific period to configure quantity-based discounts using slabs (e.g., 5% for 100 units, 10% for 500 units). Once set, save and apply the discounts, ensuring they are automatically reflected in transactions during the specified period.

Business Partner Master Data

Code Manual V0005 Vendor

Name John Ex Corporation

Group Vendors

Currency US Dollar

Federal Tax ID

Account Balance Local Currency 0.00

Goods Receipt POs -11,775.80

Purchase Orders 0.00

Special Prices for Business Partners

BP Code V0005 BP Name V0005 BP Type Vendor

Price List Price List 01

Discount Percentage 0.000

Find

Period Discounts

#	Item No.	Valid From	Valid To	Price List	Discount %	Price after Disc...	A...
1	FG0005	03/24/25		Last Purchase Price	5.000	\$ 55.11	<input checked="" type="checkbox"/>
2				Last Purchase Price	0.000	\$ 58.01	<input checked="" type="checkbox"/>

OK Cancel Copy Discounts

Active From To

Inactive

Advanced

OK Cancel Add Items Copy Discounts

OK Cancel You Can Also

12.1.2 Define Contractor Warehouse

Go To: Administration → Setup → Inventory → Warehouses

Make sure to enable bin locations. When the warehouse record is saved, the system will generate a default bin location code. Next, display the user-defined fields by pressing **Ctrl+Shift+U**.

The screenshot shows the 'Warehouses - Setup' window with the 'General' tab selected. The 'Warehouse Code' is '01-1' and the 'Warehouse Name' is 'Bhopal Warehouse'. The 'Bin Locations' section has the 'Enable Bin Locations' checkbox checked. A secondary 'General' dialog box is open on the right, showing 'BMM Third Party Warehouse' set to 'Yes', 'Contractor's Code' as 'V0005', and 'Contractor's Name' as 'John Ex Corporation'.

Enter the contractor's business partner code, then select "Yes" to the contractor's warehouse prompt. Click UPDATE.



BatchMaster ERP does not support Multiple Bin Locations on Third Party Warehouse. It creates and supports System Bin Location for tracking purposes. Thus you should not create any additional Third Party Warehouse Bin Location.

12.1.3 Define Outside-Processing Cell

Go To: Administration → Setup → Formula → Cell Setup

The screenshot shows the 'Cell Setup' window with the 'General' tab selected. The 'Cell' is 'AJAX' and the 'Description' is 'AJAX Manufacturing Inc.'. The 'Process Cell Type' is 'Mix'. The 'General' tab is active, showing 'Type' as 'Batch', 'Capacity' as '10,000.00', 'Setup Time' as '00:30', and 'Run Time' as '08:00'. The 'Rank' is '1', 'Start Time' is '06:00', and 'End Time' is '14:30'. The 'View Process Cell Capacity Override' button is visible.

Define a unique process cell for the contract manufacturer. Doing so has two main advantages: (1) Batches opened for outside processing will not impact the scheduling of in-house jobs, and (2) you can use the scheduling dashboard to track and manage the load at the contract manufacturer.

12.1.4 Define Outside Processing Formula

While not required, it may be advantageous to define a unique formula for use by the sub-contractor. Your production formula likely includes in-house labor, overhead, fixed and/or variable costs, and in-house set-up charges. None of these will apply when the product is made outside your facility. Instead, you could choose to apply a different labor and/or overhead code and number of hours to cover the cost of pulling, packing and shipping raw materials and packaging to the contractor. When you define the outside-processing formula, follow these steps:

Go To: Formulation → Formula Entry

1. Use the “find” function to call up the active revision of the desired formula in your production warehouse. Right-click in the top portion of the screen and select “duplicate.” When the window is refreshed, enter a formula name that identifies it as an outside-processing formula.
2. Switch to the Labor tab and delete all row entries using the right-click function.
3. Switch to the By-Products tab and delete all row entries.
4. Switch to the QC Test tab and delete all row entries.
5. Switch to the Attributes tab and make any needed changes.
6. Return to the Revision tab (see next page) and enter appropriate data in the fields boxed in red. Pay particular attention to the *warehouse* field – be sure to enter the contractor’s warehouse code. After saving the development revision, click the “Make Active” button.

Refer to the *BME-B1 18.2 Formulation User Guide* for more details.

12.1.5 Define Outside-Processing Bill of Materials

Go To: Bill of Material → Bill of Material Entry

Use the “find” function to call up the active revision of the desired BOM in your production warehouse. Right-click in the top portion of the screen and select “duplicate.” When the window is refreshed, re-type the item name or use the look-up function to fill the field. Enter the codes for the outside-processing warehouse and formula. Switch to the revision tab, remove any Labor ID or Overhead ID codes, and zero out any labor hours. Save the development revision, then click the “Make Active” button.

If you enter the raw materials and quantities from the outside-processing **formula** on the items tab of the **BOM** the data will appear in the inventory transfer request for the batch. You can then add or delete items and modify transfer quantities before converting the transfer request to a hard transfer. This process will be covered in detail in a subsequent section of this document.

Switch to the Third Party tab and enter the following information:

Labor ID: This field is used to link the labor created from the *Labor/Additional Cost* master. Selecting a Labor ID via the lookup automatically populates the *Service Charge/Unit* (standard labor cost) and the *Service Account Number* as specified below.

The Labor ID you specify on the *Bill of Material Entry* screen gets populated on *Batch Ticket* screen at the *Formula* tab. When a batch is created for an item with a third party BOM (configured Labor ID), a non-editable labor line is automatically added to *Batch Ticket* Screen. This ensures the labor cost is included in the final finished goods cost without manual adjustments.

Consider Special BP Pricing: If *Consider Special BP Price* checkbox is selected, the system allows for associating special pricing with the Vendor linked to the third-party warehouse.

Service Charges/Unit: this is the price the sub-contractor charges for the product

Service Account Number: defaults from Production Defaults and can be changed here

PO Remarks: will print on the purchase order sent to the contractor

Inventory Transfer Remarks: will print on the inventory transfer document

Click UPDATE to save your work.

12.2 Create Outside-Processing Batch

Go To: Process Manufacturing → Batch Entry

Batch Entry

Series: S01
Batch Number: Batch102
Batch Status: New On Hold
Batch Type: Mix
Formula ID: F08
Revision No: 000000001
Warehouse:
Production Whse: 01-1
Process Cell: TP001
Schedule: Forward

Owner: manager
Demand Type: Independent
Sales Order:
Customer Key:
Source: Production
Req Date:
Sch Start Date: 04/05/25 1:00AM
Sch End Date: 05/23/25 2:00AM
No. of Runs: 1
Project:
Distr. Rules:
Production Stages

User Defined Date

Additional Information

Show all Finished Goods

#	Item Code	Item Description	Whse	Qty to Produce	Unit	Fill Level	Fill Unit	Container Unit	Pack Qty	Pack Fill Unit
1	FG0005	Ice Cream Sundae	01-1	2.000	KG	1.000	KG		0	
2			01-1	0.000		0.000				

Order Weight: 2.000
Order Volume: 2.000
Batch Weight: 2.001
Batch Volume: 2.001

OK Cancel Deviations Select Batch to Rework Import From SO

Open a production batch using the outside-processing formula. Enter the codes for the contractor’s warehouse and process cell. In the lower grid, place your cursor in the top left cell and TAB out. The item code and warehouse information will display, as will the item’s unit of measure and applicable fill data. Enter the quantity to produce and click on ADD button.

At the bottom of your screen in the system message area, the numbers of the service purchase order and the inventory transfer request tied to the batch will display. Write them down for future use.

Now from the context Menu, select “Release Batch” to release the created Batch. choose the Third Party Document Report option. The system will automatically generate the Service Purchase Order and Inventory Transfer Request for the third-party service.

Finally, click OK to close the batch entry screen.

12.3 View/Edit Service Purchase Order

Go To: Purchasing – A/P → Purchase Order to view the service purchase order created when the outside-processing batch was saved. Observe that the production data from the batch, the service charge data from the BOM, and the outside-processing batch numbers are displayed. Make any edits needed to the PO, then click UPDATE to save your work or OK to close the screen.

Purchase Order

Vendor: AJAX01
 Name: AJAX Manufacturing Inc.
 Contact Person: 01
 Vendor Ref. No.:
 Local Currency:

No. Primary: 1027 - 0
 Status: Open
 Posting Date: 06/29/17
 Delivery Date: 06/29/17
 Document Date: 06/29/17

Item Vendor

Contents | Logistics | Accounting | Attachments

Item/Service Type: Service
 Summary Type: No Summary

#	Description	Reference FG	Quantity	Unit Price	Tax Code	Total (LC)	Reference FG Code	Reference Batch ...
1	Salad Chicken & Roasted Beets-24 Oz	50		\$ 2.50		\$ 125.00	Chicken Salad 24 Oz	AJAX-01
2								

Buyer: -No Sales Employee-
 Owner:

Remarks: PRODUCTION QC TEST REPORT REQUIRED

Total Before Discount: \$ 125.00
 Discount: %
 Rounding
 Tax:
 Total Payment Due: \$ 125.00

Update Cancel Copy From Copy To

12.4 View/Edit Inventory Transfer Request

Go To: Inventory → Inventory Transactions → Inventory Transfer Request to view the draft inventory transfer request created when the outside-processing batch was saved. If necessary you can adjust the transfer quantities to reflect the package or carton quantities that you would ship to the contractor. This will also facilitate shipping some “extra” of each raw material and packaging item to account for any transit damage or losses at the contractor’s facility.

The screenshot shows the 'Inventory Transfer Request' window. It includes fields for Business Partner (AJAX01), Name (AJAX Manufacturing Inc.), Contact Person (01), and Ship To. It also shows No. (Primary 1001), Status (Open), Posting Date (06/29/17), Due Date (06/29/17), and Document Date (06/29/17). Below these are fields for From Warehouse (01), To Warehouse (AJAX), and Price List (Price List 01). The main part of the window is a table with columns: #, Item No., Item Description, From W..., To Ware..., Quantity, UoM Code, and UoM Name. The Quantity column is highlighted with a red box. At the bottom, there are fields for Sales Employee (-No Sales Employee-), Pick and Pack Remarks, Journal Remarks (Inventory Transfer Request - AJAX01), and Remarks (HAVE ITEMS READY BY 2PM). Buttons for Update, Cancel, and Copy To are at the bottom.

#	Item No.	Item Description	From W...	To Ware...	Quantity	UoM Code	UoM Name
1	PK1006	Label Salad Chicken & Rstd F	01	AJAX	50	Manual	EACH
2	PK1002	Container 24Oz	01	AJAX	50	Manual	EACH
3	PK1007	"Label White ""Use by""	01	AJAX	50	Manual	EACH
4	Lettuce Mixed	Lettuce Mixed	01	AJAX	12.755	Manual	LB
5	Cooked Chic	Cooked Chicken Strip Tumb	01	AJAX	25.51	Manual	LB
6	Roasted Beets	Roasted Beets	01	AJAX	10.204	Manual	LB
7	RM1084	Olive Oil - Virgin	01	AJAX	5.1	Manual	LB
8	RM1009	Fresh Cherry Tomatoes 2#	01	AJAX	12.755	Manual	LB
9	RM1010	Crumbled Cheese Feta	01	AJAX	10.204	Manual	LB
10			01	AJAX			

When you have made necessary edits, click UPDATE to save your work, then click the “Copy To” button and select Inventory Transfer.

12.4.1 Select Material Lot Numbers to Transfer

In the window that appears, for each item you must choose one or more lot numbers to transfer to the contractor's warehouse. Remember SAP Business One refers to a "lot" as a "batch" which can be confusing! The top grid lists all the lot-controlled items required for production. As you highlight each row, the lower left grid shows all the lots available.

Batch Number Selection

Rows from Documents

#	Item No.	Whse Code	Quantity	Total Selected
4	Lettuce Mixed	01	15	
5	Cooked Chicken Strip	01	28	
6	Roasted Beets	01	12	
7	RM1084	01	6	
8	RM1009	01	14	
9	RM1010	01	12	

Available Batches

Find

#	Batch	Available Qty	Selected Qty
1	15090010	10.337	6.0
2	17040010	20	
3	17040011	500	
4	17040012	100	

Selected Batches

Issued Containers 1

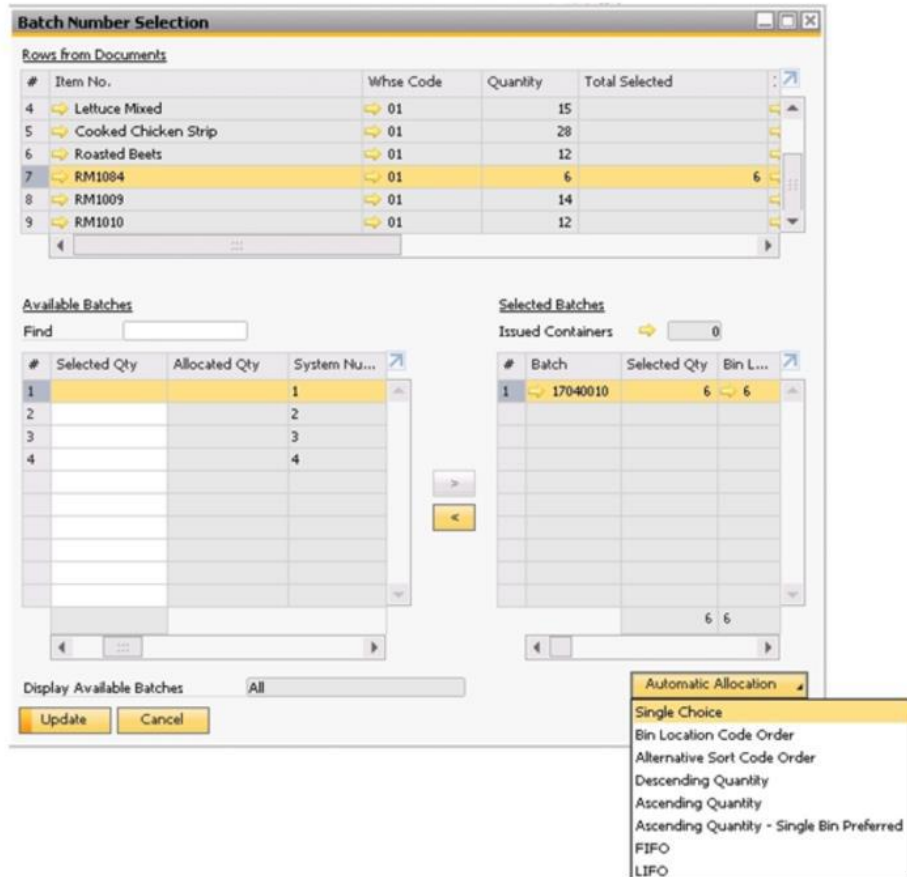
#	Batch	Selected Qty	Bin L...
---	-------	--------------	----------

Display Available Batches All

Update Cancel Automatic Allocation Auto Select

In this example, we need to select a quantity of 6 for item code RM1084. Based on the lot issue rules defined for the item at the *Item Master Details* screen, the system is suggesting we use lot number 15090010. To do so we would click the "auto select" button in the lower right corner of the screen. To over-ride the system suggestion, we would highlight the desired lot number, type in the selected quantity, then click the "greater than" button to process the selection. It is also possible to do a split issue, that is, issue from more than one lot. Repeat this process until you have addressed all the items in the top grid.

After you have selected all the lots to be transferred, you must determine the lot allocation method for each item. Highlight a row in the top grid and click the “Automatic Allocation” button. From the drop-down, select the desired method, then click the update button. When you have addressed all the items in the top grid, the OK button will be displayed on the Batch Number Selection screen. Click OK to close the screen, then click the ADD button on the Inventory Transfer screen. Answer “yes” to the warning message and the system will process the transfer.



To facilitate tight control over raw material lots it is critical that the contractor provides written evidence of the lots used in each batch. Unauthorized mixing of raw material lots in a batch must be avoided.

12.5 Create Goods Receipt PO

When production is completed at the sub-contractor’s facility, we must complete some transactions in the system. The first of these is a Goods Receipt PO created from the service purchase order. **Go To: Purchasing – A/P → Purchase Order** to view the service purchase order tied to the outside-processing batch. At the bottom of the screen, click the “Copy To” button and select “G. Receipt PO” from the drop-down.

Goods Receipt PO

Vendor: AJAX01
 Name: AJAX Manufacturing Inc.
 Contact Person: 01
 Vendor Ref. No.:
 Local Currency:

No. Primary 1033
 Status Open
 Posting Date 06/29/17
 Due Date 06/29/17
 Document Date 06/29/17

Contents | Logistics | Accounting | Attachments

Item/Service Type: Service | Summary Type: No Summary

#	Description	Reference FG ...	Unit Price	Tax Code	Total (LC)	Reference Batch ...	Refs...
1	Salad Chicken & Roasted Beets-24 Oz	50	\$ 2.50		\$ 125.00	AJAX-01	Chicken
2							

Buyer: -No Sales Employee-
 Owner:

Total Before Discount: \$ 125.00
 Discount: %
 Rounding: \$ 0.00
 Tax:
 Total Payment Due: \$ 125.00

Remarks: PRODUCTION QC TEST REPORT REQUIRED Based On Purchase Orders 1027.

Add Cancel Copy From Copy To

Make any edits needed to the GRPO, then click ADD to save your work. The Receive Lots screen will open, where you define the lot number data for the finished product.

12.5.1 Receive Finished Item Lots

#	FG Line ID	Item Code	Description	Whs Code	Standard Qty.	Actual Qty.	UOM
1	1	Chicken Salk Salad Chicken 8		AJAX	50.000	50.000	EACH

#	Lot No	Container No	Expiry Date	Bin No	Lot Status	Quantity	UOM
1	17060022		07/31/17	AJAX-SYSTEM-BIN-LOC	ALL	50.000	EACH
2						0.000	

In the upper grid we see a list of the items to be received from the contractor. In the lower grid, for each highlighted line the system will display a suggested lot number if you have defined a Batch Series for the item at the *Item Master Details* screen. You can over-ride the system suggestion. Enter an expiry date for the lot. If the lot to be received is suspect, change the lot status accordingly. You can split the lot, clearing a partial quantity for use, if needed. When you have finished editing the data, click ADD or UPDATE to save your work. Finally, click the ADD button on the GRPO screen to save that record.

12.6 Configuring and Mapping Service Charges in Third-Party Processing

This section explains the updated Third-Party Service Charge Integration within the Bill of Material (BOM) Entry screen in SAP Business One. The functionality supports the direct inclusion of labor costs in the cost calculation of finished goods (FG), ensuring accurate cost tracking and improved transparency.

Previously, labor costs were manually included in the Service Purchase Order (PO). With this update, when a production batch is closed, the system automatically calculates third-party service charges based on the posted and updated Service GRPO, posts the corresponding journal entry (JE), updates the FG unit cost, and clears the WIP account, transferring all related costs to finished goods.

The Special Prices for Business Partner (BP) feature allows users to map contractors to finished goods (BOM) and configure service charges using both Period Discounts (date-based) and Volume Discounts (quantity-based). This structure provides greater flexibility and control in managing third-party service pricing within production workflows.

12.7 Possible Scenarios for Service Charge Configuration in Third Party

1. Period-Wise Service Charge Only

- If service charges are required based only on a date range, enter the details in the *Period Discount* screen.
- Define the applicable date range in the *Valid From* and *Valid To* fields.

2. Volume (Quantity)-Wise Service Charge Only

- To apply service charges based on quantity slabs, first, enter a single line in the *Period Discount* screen with a long validity period (e.g., Valid To: 31.12.2099).
- Double-click on the entry to open the *Volume Discount* screen.
- Define service charges based on quantity slabs.
- The system will always refer to the first period entry's linked Volume Discount Special Price.

3. Period-Wise & Volume-Wise Service Charge Both Required

- If both date-wise and quantity-wise service charges are needed, define the service charge in both the *Period Discount* and *Volume Discount* screens.
- Ensure that quantity slabs are correctly mapped to the respective period slabs.
- The system will apply the quantity-based service charge only within the selected period.
- Proper configuration of date and quantity slabs ensures accurate service charge calculations.

12.7.1 Mapping labor cost as service charge in third party

1. Bill of Material Entry: The process begins with defining what needs to be manufactured. The "Bill of Material Entry" screen for item "INTOL" outlines the necessary raw materials and, importantly, specifies the third-party processing cost (**Labor Cost: 13.5 \$**) associated with purchase order "621000000100101." This cost is factored into the final BOM calculation for potential outsourcing.

Bill of Material Entry

Item: PA_INT, Description: INT01, Warehouse: 03rd, Type: Intermediate, Formula: PA_F01, Fill Level: 0.000

Product Category: [Empty], Default Intermediate: [Empty], Revision: [Empty], Whs Code: [Empty], UOM: [Empty]

Status: Active, Revision: 000000001, Cost By: 0, Owner: pavitra

Buttons: Refresh Prices, Send For Approval

Items | Consumables | Revision | Attachments | Attributes | Third Party

Labor Id: PA_L1, Service Charges/Unit: 13.500, Service Account Number: 62100000100101

PO Remarks: S1

Inventory Transfer Remarks: S2

Notes: S3

Comments: [Empty]

BOM Cost: 0.00, Calculate Cost, View Complete BOM

Buttons: OK, Cancel

2. A production batch is created, as seen in the "Batch Ticket" screen for batch "BATCH0003" of item "PA_INT INT01." This stage details the **Standard Qty as 5 and Labor Hours as 5**, the planned labor ("PA_L1") and its estimated units and duration, and the intended warehouse ("03rd"). The batch is released and scheduled for material allocation and process completion around April 2025.

Batch Ticket

Batch Number: BATCH0003, Production Whse: 03rd, Type: Mix, Status: Released, Formula ID: PA_F01, Revision: 000000001, Warehouse: [Empty], Owner: pavitra

Demand Type: Independent, Sales Order: [Empty], Customer Key: [Empty], Issue/Alloc/Return Date: 04/08/25, Part Close / Close Date: 04/08/25, Pick Status: Ready to Pick

Buttons: Production Stages, Deviations

General | Formula | Finished Goods | By Products | Consumables | Cost | Attachments

#	Select	FG Code	Description	Whse	Original Whse	Standard Quantity	Stock UOM	Unit	Toggle to UoM	Actual Qty.	Qty. Produced	Q.
1	<input checked="" type="checkbox"/>	PA_INT	INT01	03rd		5.000	KG	KG		5.000	0.000	
2	<input type="checkbox"/>					0.000				0.000	0.000	

#	Item Code	Item Description	Whse	Original Whs	Labor Hours DD:HH:MM	Labor Units	Qty. Required	Stock UOM	Unit	Toggle to UoM	Overhea...
1	PA_L1	PA_L1			00:05:00	300.000000	300.000				
2							0.000				

Batch Weight: 5.750, Order Weight: 5.000, Produced Weight: 0.000
 Batch Volume: 6.900, Order Volume: 6.000, Produced Volume: 0.000

Buttons: OK, Cancel

Purchase Order

Vendor: V001
 Name: V VENDOR
 Contact Person: [dropdown]
 Vendor Ref. No.: [text]
 Local Currency: [dropdown]
 Item Vendor: [button]

No. Primary: 1 - 0
 Status: Open
 Posting Date: 04/08/25
 Delivery Date: 04/08/25
 Document Date: 04/08/25

Contents		Logistics		Accounting		Attachments	
Item/Service Type	Service			Summary Type		No Summary	
#	Description	G/L Account	D...	G/L Account Name	Tax C...	Total (LC)	Blan... B
1	INT01	62100000-01-		Bad Debts (HO, USA,		\$ 67.50	
2							

Buyer: -No Sales Employee-
 Owner: [text]
 Remarks: S1

Total Before Discount: \$ 67.50
 Discount: [text] %
 Rounding
 Tax: [text]
 Total Payment Due: \$ 67.50

OK Add Draft & New Cancel Copy From Copy To

5. Receive the Outsourced Service (Goods Receipt PO): As the third-party completes their work, "Goods Receipt PO" screens (PO Nos. 4 posted on 04/08/25) confirm the receipt of 3 quantities (**First partial GRPO for 3 FG qty received $3 * 13.5 = 40.50$ \$**), manufacturing services from "V VENDOR" for item "INT01." These documents record the cost of the received services.

Goods Receipt PO

Vendor	→ V001	No.	Primary	4
Name	V VENDOR	Status	Open	
Contact Person		Posting Date	04/08/25	
Vendor Ref. No.		Due Date	04/08/25	
Local Currency		Document Date	04/08/25	

Contents		Logistics		Accounting		Attachments	
Item/Service Type	Service	Summary Type		No Summary			
#	Description	G/L Account	Distr. Rule	G/L Account Name	Tax C...	Total (LC)	
1	INT01	→ 62100000-01-		Bad Debts (HO, USA,		\$ 40.50	

- Update Planned Labor in Batch (Updated Batch Ticket): The "Batch Ticket" for batch "BATCH0003" is updated to reflect the planned labor of "PA_L1" requiring **180 labor units** over an estimated **3 hours**. This refined labor plan contributes to the batch weight and order weight calculations, with the batch remaining released and scheduled for material allocation and process completion around April 2025.

Batch Ticket

Batch Number: BATCH0003
 Type: Mix
 Status: Released On Hold
 Formula ID: PA_F01
 Revision: 000000001
 Warehouse:
 Owner: pavitra

Production Whse: 03rd
 Demand Type: Independent
 Sales Order:
 Customer Key:
 Issue/Alloc/Return Date: 04/08/25
 Part Close / Close Date: 04/08/25
 Pick Status: ReadytoPick

Production Stages
 Deviations

#	Select	FG Code	Description	Whse	Original Whse	Standard Quantity	Stock UOM	Unit	Toggle to UoM	Actual Qty.	Qty. Produced	Q.
1	<input checked="" type="checkbox"/>	PA_INT	INT01	03rd		5.000	KG	KG		3.000	0.000	
2	<input type="checkbox"/>					0.000				0.000	0.000	

#	Select	LineType	FG Code	Item Code	Item Description	Whse	Original Whse	Labor Hours DD:HH:MM	Labor Units	Qty. Required	Stock UOM	l
1	<input type="checkbox"/>	Labor	PA_INT	PA_L1	PA_L1			00:03:00	180.000000	300.000		
2	<input type="checkbox"/>	BOMItem								0.000		

Batch Weight: 5.750 Order Weight: 5.000 Produced Weight: 0.000
 Batch Volume: 6.900 Order Volume: 6.000 Produced Volume: 0.000

OK Cancel

- Receive the remaining Outsourced Service (Goods Receipt PO): Goods Receipt PO screen (PO Nos. 5 posted on 04/08/25) confirm the receipt of 2 quantities (**Second partial GRPO for 2 FG qty received 2 * 13.5 = 27 \$**), manufacturing services from "V VENDOR" for item "INT01." These documents record the cost of the received services.

Goods Receipt PO

Vendor: V001
 Name: V VENDOR
 Contact Person:
 Vendor Ref. No.:
 Local Currency:
 No.: Primary 5
 Status: Open
 Posting Date: 04/08/25
 Due Date: 04/08/25
 Document Date: 04/08/25

Contents Logistics Accounting Attachments

Item/Service Type	Service	Summary Type	No Summary				
#	Description	G/L Account	Distr. Rule	G/L Account Name	Tax C...	Total (LC)	E
1	INT01	62100000-01-		Bad Debts (HO, USA,		\$ 27.00	

- Update Planned Labor in Batch (Updated Batch Ticket): The "Batch Ticket" for batch "BATCH0003" is updated to reflect the planned labor of "PA_L1" requiring **300 labor units** over an estimated **5 hours**.

Batch Ticket

Batch Number: BATCH0003
 Type: Mix
 Status: Released On Hold
 Formula ID: PA_F01
 Revision: 000000001
 Warehouse:
 Owner: pavitra

Production Whse: 03rd
 Demand Type: Independent
 Sales Order:
 Customer Key:
 Issue/Alloc/Return Date: 04/08/25
 Part Close / Close Date: 04/08/25
 Pick Status: ReadytoPick

Production Stages
 Deviations

#	Select	FG Code	Description	Whse	Original Whse	Standard Quantity	Stock UoM	Unit	Toggle to UoM	Actual Qty.	Qty. Produced	Q.
1	<input checked="" type="checkbox"/>	PA_INT	INT01	03rd		5.000	KG	KG		2.000	0.000	
2	<input type="checkbox"/>					0.000				0.000	0.000	

#	Select	LineType	FG Code	Item Code	Item Description	Whse	Original Whs	Labor Hours DD:HH:MM	Labor Units	Qty. Required	Stock UoM	l
1	<input type="checkbox"/>	Labor	PA_INT	PA_L1	PA_L1			00:05:00	300.000000	300.000		
2	<input type="checkbox"/>	BOMItem								0.000		

Batch Weight: 5.750 Order Weight: 5.000 Produced Weight: 0.000
 Batch Volume: 6.900 Order Volume: 6.000 Produced Volume: 0.000

OK Cancel

- Finally full close the production batch. From the context menu, open the Production Goods Transaction Report for batch. The report will list down **labor line with 67.5 \$** for service charge which will show effect in **finished goods received with 2 & 3 qty at part close**.

Production Goods Transaction Report

Batch No	Transaction T...	Doc No	Item Code	Whs Code	Journal Entry	DbtCrd	Account	Line Type	Lot No	Bin No	Lot Status	Qty In Displa...	Display UoM	Unit Price	Amount
▼ BATCH000															
	Issue		10	PA_BATCH	03rd		111000000100	MATERIAL	PA_BATCH_3RD	03RD-SYSTEM	ALL	1.000	KG	10.58	10.58
	Journal Entry		36				111000000100	Line Labor-BATC DEBIT				0.000		67.50	67.50
			36				621000000100	Line Labor-BATC CREDIT				0.000		67.50	67.50
	Receipt		12	PA_INT	03rd		111000000100	FINISHEDGOOD PA_INT02		03RD-SYSTEM	ALL	2.000	KG	15.62	78.08
			12	PA_INT	03rd		111000000100	FINISHEDGOOD PA_INT05		03RD-SYSTEM	ALL	3.000	KG	15.62	78.08
								FINISHEDGOOD							

OK

12.8 Third Party Dashboard

You can now access the outside-processing batch from the third party dashboard (see next page.) Enter the batch number or select from the lookup, then make sure the receipt date range includes the actual GRPO receipt date. Notice the lower grid displays the finished item lot number we accepted when receiving the GRPO tied to the service purchase order. When we click the “Part Close” button the batch will be removed from the dashboard.

Go To: Process Mfg. → Production Utilities → Third Party Dashboard

12.9 Material Issue to Outside-Processing Batch

On the batch close screen we see the status is now “part closed” and the finished goods tab shows we will receive 50 units of the chicken salad. We can modify this quantity as needed, as well as update the quantities of packaging items and raw materials used in production.

Batch Close

Batch Number: AJAX-01
 Type: Mix
 Status: **PartClosed** On Hold
 Formula Key: Chicken Salad 24 Oz OSP
 Revision: 000000001
 Warehouse:
 Owner: manager

Production Whse: AJAX
 Demand Type: Independent
 Sales Order:
 Customer Key:
 Last Issue/Alloc Date:
 Part Close Date: 07/05/17

Production Stages
 Deviations

Finished Goods | Materials | By Products | Labor and Overhead Show all Finished Goods

#	Select	FG Code	Description	Whse	Original Whse	Standard Quantity	Stock UOM	Unit	Actual Qty.	Qty. Produced	Status	Fill Level	Fill...
1	<input type="checkbox"/>	24 Oz	Salad Chick	AJA		50,000	EACH	EACH	0.000	50,000	Receive	24,000	Oz
2	<input type="checkbox"/>					0.000			0.000	0.000	New	0.000	

#	Select	FG Code	Item Code	Description	Whse	Original ...	Qty. Required	Stock UOM	Unit
1	<input type="checkbox"/>		PK1006	Label Salad Chicken & Rstd Beet	AJAX	01	50,000	EACH	EACH
2	<input type="checkbox"/>		PK1002	Container 24Oz	AJAX	01	50,000	EACH	EACH
3	<input type="checkbox"/>		PK1007	"Label White ""Use by""	AJAX	01	50,000	EACH	EACH
4	<input type="checkbox"/>						0.000		

Right-click in the header area and choose “Issue Batch.” The Material Issue window appears, where we choose the lot number or numbers of each raw material and packaging item used during production.

We can use the Auto Select function to have the system pick lot numbers based on the material issue rule defined at each item’s *Item Master Details* screen. Refer to the *BME-B1 18.2 Production User Guide* for details.

12.10 Batch Closed – Goods in Inventory

Following material issues, the last step is to mark the outside processing batch “closed” by right-clicking in the header and choosing “close batch.”

Batch Close

Batch Number: AJAX-01
 Type: Mix
 Status: **Closed** On Hold
 Formula Key: Chicken Salad 24 Oz OSP
 Revision: 000000001
 Warehouse:
 Owner: manager

Production Whse: AJAX
 Demand Type: Independent
 Sales Order:
 Customer Key:
 Last Issue/Alloc Date: 07/05/17
 Part Close Date: 07/05/17

Production Stages
 Deviations

Finished Goods | Materials | By Products | Labor and Overhead Show all Finished Goods

#	Select	LineType	Item	Description	Whse	Original Whse	Qty. Required	Stock UOM	Unit	Actual Qty.	Qty. Issued	Qty. to Return
1	<input type="checkbox"/>	Material	Lettuce Mixe	Lettuce Mixec	AJA	AJAX	12.755	LB	LB	0.000	12.755	0.000
2	<input type="checkbox"/>	Material	Cooked Chi	Cooked Chic	AJA	AJAX	25.510	LB	LB	0.000	25.510	0.000
3	<input type="checkbox"/>	Material	Roasted Bee	Roasted Beet	AJA	AJAX	10.204	LB	LB	0.000	10.204	0.000
4	<input type="checkbox"/>	Material	RM1084	Olive Oil - Vii	AJA	AJAX	5.102	LB	LB	0.000	5.102	0.000
5	<input type="checkbox"/>	Material	RM1009	Fresh Cherry	AJA	AJAX	12.755	LB	LB	0.000	12.755	0.000
6	<input type="checkbox"/>	Material	RM1010	Crumbled Ch	AJA	AJAX	10.204	LB	LB	0.000	10.204	0.000
7	<input type="checkbox"/>	Material					0.000			0.000	0.000	

Observe that the finished items now appear in the contractor’s warehouse. They can be transferred back to the main warehouse or shipped to customers directly from the contractor.

#	Whse Code	Enforce Default Bin Loc.	In Stock	Committed	Ordered	Available	It...
1	01	<input type="checkbox"/>	1,000	11,020		-10,020	
2	AJAX	<input type="checkbox"/>	50	11,020		50	
3		<input type="checkbox"/>					
			1,050	11,020		-9,970	

13 Adverse Event Reporting

One of the salient and basic requirements of FDA is to record adverse events. Complaint management is a very important aspect in an organization and if it is relating to the manufacturing process, then it is often a bottleneck as may mean recalling production runs. Using BatchMaster ERP, you can efficiently enforce the process of complaint management through the system, ensuring that all complaints are handled properly from receipt to closure.

We will first address some prerequisites before covering the process of complaint entry.

13.1 Complaint Type

It is easy to handle complaints if you categorize them in logical groups. You can use the *Complaint Type* screen to define a complaint group, which you can use while recording a new complaint.

Go To: Administration → Setup → Service → Complaint Type

13.2 Complaint Severity Type

The degree of seriousness of a customer issue is another aspect of complaint management. Critical issues need to be resolved quickly; lesser complaints can be handled with less urgency. On the *Complaint Severity Type* screen, you can define the degree of severity of issues.

Go To: Administration → Setup → Service → Complaint Severity Type

While recording a complaint, you can use the appropriate severity type.

#	Complaint Severity Type
1	HIGH
2	LOW
3	MEDIUM
4	

13.4 Complaint Entry

To implement appropriate corrective and preventive action plans for a customer complaint, a well-documented complaint record is expected needed. This record will help you manage the complaint until it is resolved, including root cause analysis and corrective and preventative actions.

Go To: Sales – A/R → Complaint Entry

The screenshot shows the 'Complaint Entry' form with the following data:

Field	Value
Complaint No	
Complaint Source	
Complaint Date	10/20/16
Status	Created
Close Date	10/20/16
Customer Code	BP01
Customer Name	
Contact Person	
Owner	manager
Due Date	10/20/16
Severity Type	MEDIUM

Doc Type	Order No	Item Code	Complaint Type
Sales Delivery	1	Turmeric	OTHER

#	Lot No	Mfg Date
1	TURMERIC-0001	10/20/16

Remarks: Instruction booklet should be provided

Complaint Details: The related document is missing

As soon as you receive a complaint, you can record it in the *Complaint Entry* screen, with all supporting information such as customer name and contact details, source of the complaint, and complaint date. To ensure traceability of an item, you can enter transactional details such as lot/serial number information. You can create an action plan to handle the complaint, assign actions to the concerned person, store investigation details of the complaint, and write any remark or note concerning the customer issue. Also, you get the flexibility to attach relevant documents to the complaint.

In the header section, you can enter basic details of the complaint, most importantly the complaint date, affected customer, complaint source and severity code.

Use the *Transaction* tab to record more information:

- Document type: defaults as a sales order delivery but can be selected as “other”
- Order number: system will list delivery documents based on the customer code entered at the header. If document type “other” was chosen above, this is a free-form text field.
- Item code: the system will default the item code from the first line of the delivery. You can override this suggestion.

You can record the complete address and contact details of the complainant on the *Address* tab.

The screenshot shows the 'Complaint Entry' window with the 'Address Detail' tab selected. The top section contains fields for Complaint No., Complaint Date (10/20/16), Status (Created), Close Date (10/20/16), Complaint Source, Customer Code (BP01), Customer Name, Contact Person, Owner (manager), Due Date (10/20/16), and Severity Type (MEDIUM). The 'Address Detail' tab is active, showing fields for Address ID (Sht 12), Street/ PO Box (4521258), Block (E), City (LA), Zip Code (452010), Country (USA), State (North Carolina), Country Code (011), Street No. (2309), Building/Floor/Room (45), and GLN. Contact information fields include Tel 1 (9245-45678), Tel 2, Mobile Phone, Fax, and Email (jack@sintac.com). 'Add' and 'Cancel' buttons are at the bottom.

On the *Investigation* tab, you can enter information related to the investigation carried out on the product. You can also enter the user who performed the investigation and on what date.

The screenshot shows the 'Complaint Entry' window with the 'Investigation Detail' tab selected. The top section contains the same complaint information as the previous screenshot. The 'Investigation Detail' tab is active, showing a 'Generic Investigation' list box, a 'User ID' dropdown menu (manager), and a 'Date' field (10/20/16). A 'Show Related Documents' button is located below the date field. 'Add' and 'Cancel' buttons are at the bottom.

On the *Action taken* tab, you can record the actions that have been undertaken to resolve the complaint. Here, you can enter the follow-up activities and corrective actions that have been undertaken after the investigation. In addition, you can maintain information on preventive actions suggested by quality personnel.

Complaint Entry

Complaint No Complaint Date 10/20/16 Status Created Close Date 10/20/16
Complaint Source Customer Code BP01 Owner manager
Customer Name Due Date 10/20/16
Contact Person Severity Type MEDIUM

Transaction Address Detail Investigation Detail **Action Taken** Notes Attachment

Action Taken

Issued document

User ID manager
Date 10/20/16

View Non Conformance

Add Cancel

On the *Notes* tab, you can add any remark or comment related to the complaint.

Complaint Entry

Complaint No Complaint Date 10/20/16 Status Created Close Date 10/20/16
Complaint Source Customer Code BP01 Owner manager
Customer Name Due Date 10/20/16
Contact Person Severity Type MEDIUM

Transaction Address Detail Investigation Detail Action Taken **Notes** Attachment

Notes

Check before release

User ID manager
Date 10/20/16

Add Cancel

On the *Attachment* tab, you can attach any supporting documents for reference. The path you browse here should lead to a network (shared) location.

Complaint Entry

Complaint No: Complaint Date: 14/11/18 Status: Created Close Date: 14/11/18
 Complaint Source: Customer Code: Owner: manager
 Customer Name: Due Date: 14/11/18
 Contact Person: Severity Type:

Transaction | Address Detail | Investigation Detail | Action Taken | Notes | Attachment

#	Source Path	Target Path	File Name	Attachment Date
1	\\Eworkplace\temp		net.pdf	14/11/18

Buttons: Add, Cancel, Browse, Display, Delete

You can define a new activity or view related activities from the *GoTo* menu of the *Complaint Entry* screen. Also, you can view the QC details of the selected lot, and you can create a new non-conforming activity for the failed product.

Complaint Entry

Complaint No: 1 Complaint Date: 10/20/16 Status: ActionTaken Close Date: 10/20/16
 Complaint Source: Customer Code: BP01 Owner: manager
 Customer Name: Due Date: 10/20/16
 Contact Person: Severity Type: MEDIUM

Transaction | Address Detail | Investigation Detail | Action Taken | Notes | Attachment

Doc Type: Sales Delivery Order No: 1 Item Code: Turmeric Complaint Type: OTHER
 Customer Name: Turmeric

Complaint Details: The related document is missing
 Remarks: Instruction booklet should be provided

Lot/Serial no information

#	Lot No	Mfg Date
1	TURMERIC-0001	10/20/16

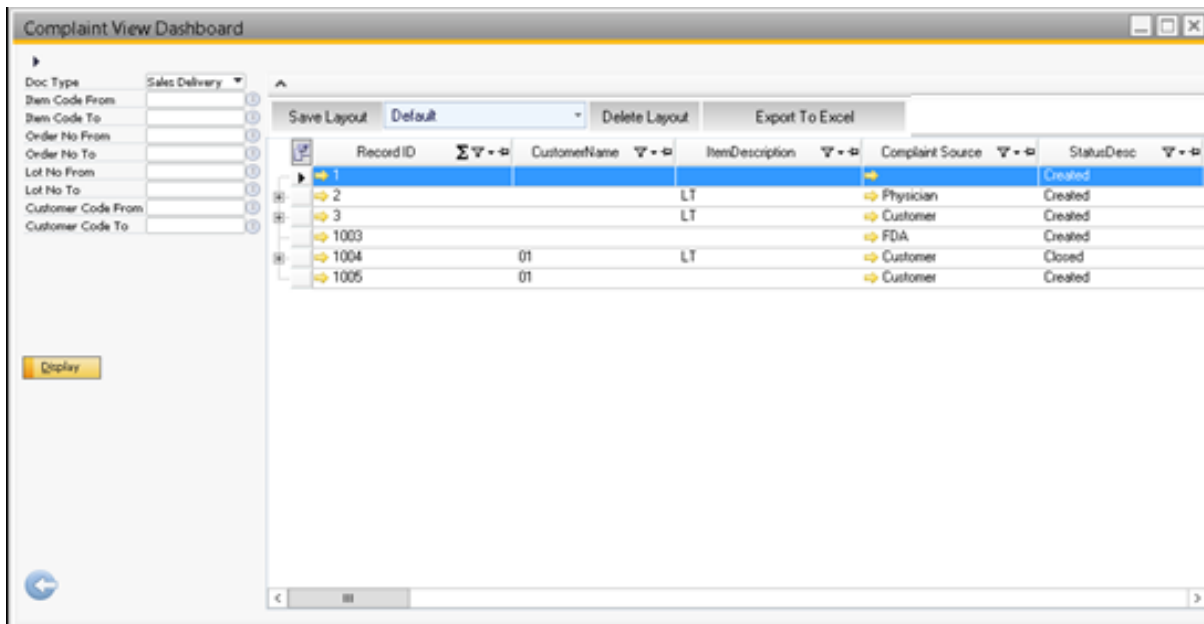
Buttons: OK, Cancel, View Related Complaints

New Activity menu:
 - New Activity
 - Related Activities
 - QC details
 - Create new NC document

13.5 Complaint View Dashboard

A well-recorded customer complaint is enough to understand the issue. This may not be sufficient to enhance processes, improve the customer experience, and avoid subjective decision making. The Complaint View Dashboard helps you handle these shortfalls.

Using this dashboard, you can view and analyze complaints for sales delivery and other documents. The filter criteria on the dashboard helps you display just the required details, drawn from the *Complaint Entry* screen.



The screenshot shows the 'Complaint View Dashboard' window. On the left, there are filter criteria for 'Doc Type' (Sales Delivery) and various code ranges (Item, Order, Lot, Customer). The main area displays a table with the following data:

Record ID	CustomerName	ItemDescription	Complaint Source	StatusDesc
1				Created
2		LT	Physician	Created
3		LT	Customer	Created
1003			FDA	Created
1004	01	LT	Customer	Closed
1005	01		Customer	Created

You can export the data to Excel sheet, if need be.

13.6 Sales Delivery Screen

The *Complaint Number* field is added in the *Sales Delivery* screen to store the complaint reference number created against the document. Press **Ctrl+Shift+U** to open the User-defined Fields window.

The screenshot displays the 'Delivery' window with the following data:

#	Item No.	BP Catalog No.	Item Description	Quantity	Ordered Qty	U.
1	Con01		LT	5	5	

Summary Totals:

- Total Before Discount: \$ 50.00
- Discount: %
- Rounding:
- Tax: \$
- Total: \$ 50.00

The 'Complaint Number' field in the 'General' tab is highlighted with a red border and contains the value '2'.

14 Nutra/Pharma-Specific Features



This section is applicable with a Nutraceutical Micro Vertical license only.

As a Nutraceutical or Pharmaceutical manufacturer, you need to continually innovate new products to meet the current and future demands of customers. The Nutra features of the Laboratory module give you capabilities that can make your innovation faster, yet simpler and reliable by means of computerized calculations. This helps you produce a sample that accurately meets your customer requirements, so that you can supply the sample along with a price quotation to the customer.

14.1 Overview: Physical Property Analysis

The *Physical Property Analysis* screen is part of the standard Laboratory functionality. It helps you:

- Experiment with formulas
- Analyze the physical properties of formulas based on the physical properties of ingredients
- Experiment with the cost of the product based on ingredient cost changes

Please refer to the *BME-B1 18.2 Laboratory User Guide* for details.

In addition to these basic functionalities, with the Nutraceutical license the following features are included and used in the *Physical Property Analysis* module:

- *Define Product types*
- *Define Soft-Gel types*
- *Define Capsule sizes*
- *Define Tablet shapes*
- *Define Tablet sizes*
- *Define Appearance colors*
- *Define Ribbon thickness*

14.2 Product Type Master

A product type can either refer to the dosage of your supplement or can indicate what product your formula is meant to produce. Some common product types are shown below.

Go To: Administration → Setup → Laboratory → Product Type Master

#	Product Type ID	Product Type Description
1	CAPSULE	CAPSULE
2	COATING	COATING
3	GELATIN	GELATIN
4	POWDER	POWDER
5	SOFTGEL	SOFTGEL
6	SYRUP	SYRUP
7	TABLET	TABLET
8		

Enter a unique code for every product type in the *Product Type ID* field and a description for the same in the *Product Type Description* field. Click the *Update* button to save the new product type.

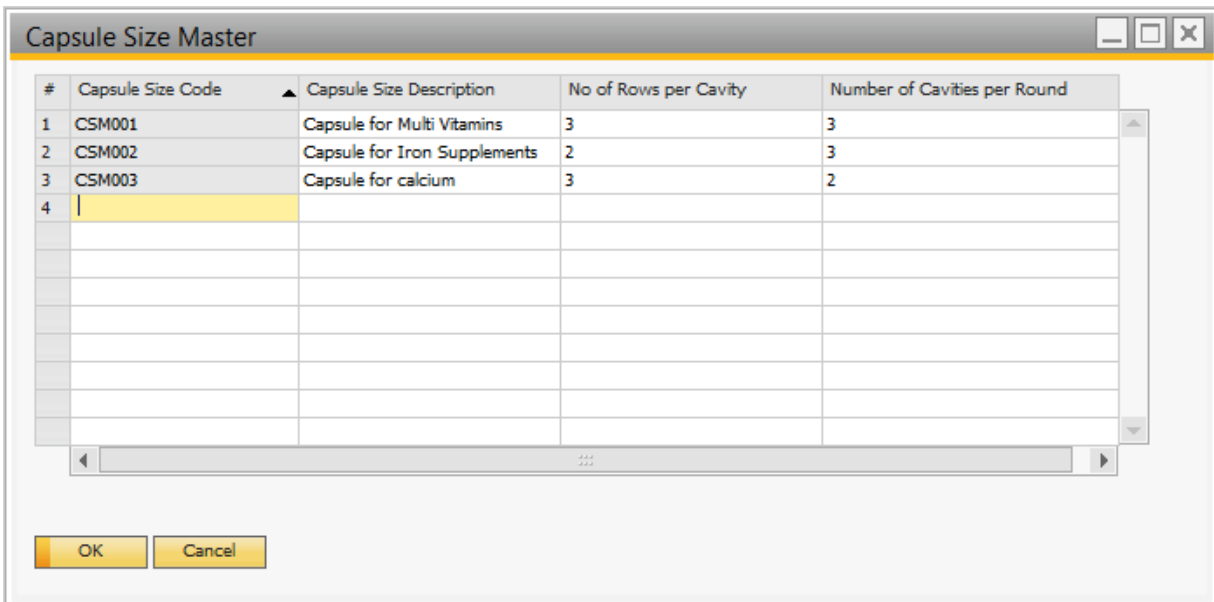
14.4 Capsule Size Master

You can use the *Capsule Size Master* to define the capsule sizes that you may use in your sample/product.

A capsule size is defined in terms of number of rows that contain cavities to hold ingredients and the number of cavities in each row.

To define a capsule size, open the *Capsule Size Master*:

Go To: Administration → Setup → Laboratory → Capsule Size Master



#	Capsule Size Code	Capsule Size Description	No of Rows per Cavity	Number of Cavities per Round
1	CSM001	Capsule for Multi Vitamins	3	3
2	CSM002	Capsule for Iron Supplements	2	3
3	CSM003	Capsule for calcium	3	2
4				

OK Cancel

For every capsule size that you are defining, enter a unique code, a description for the code, number of rows and number of cavities in the respective fields.

Click the *Update* button to save the record.

14.4.1 Laboratory Defaults

For a Capsule type of product, you can set the default Item Group whose item can be displayed in the Capsule Code lookup available at the *Physical Property Analysis* screen.

The screenshot shows the 'Laboratory Defaults' dialog box with the 'Food Vertical' tab selected. The 'Policies not Allowed in Physical Property Analysis' table contains one row with a 'Select' checkbox, a 'Policy' of 'P1', and a 'Description' of 'Policy1'. Below the table, there are several options: 'Use Property Override Values' (unchecked), 'Include Property Analysis on what Page' (set to 'Own Page'), 'Print Property Analysis on' (set to 'Plain Paper'), 'Capsule Item Group' (set to 'Finished Goods' and highlighted with a red box), and 'Print QC Results' (unchecked). At the bottom, there are 'OK' and 'Cancel' buttons.

#	Select	Policy	Description
1	<input type="checkbox"/>	➔ P1	Policy1

Use Property Override Values
Include Property Analysis on what Page: Own Page
Print Property Analysis on: Plain Paper
Capsule Item Group: ➔ Finished Goods Print QC Results
Caption for Vertical Item Column:

14.9 Physical Property Analysis Details

The *Physical Property Analysis* screen is equipped with special features discussed above that facilitate the development of sample formulas in a Nutraceutical or Pharmaceutical environment.

In order to make use of these sample-oriented features, you need to enter certain information on the *Physical Property Analysis* screen.

Go To: Laboratory → Physical Property Analysis

The screenshot shows the 'Physical Property Analysis' window. At the top, there are fields for Formula (SG1), FG Code (ds), Description (sd), Project Id, Revision (000000001), Product Type (SOFTGEL), RM Cost By (Price List 01), Customer Code, Batch Size (40,000), Status (Experimental), and Owner (manager). There are buttons for 'Refresh Price', 'Make Active', 'Calculate Cost', 'Calculate Batch Qty.', and 'Gelatin/Coating'. Below this is a 'Physical Properties' tab with various fields like Capsule Size (CSM00), No Of Rows Cavity (3), No Of Cavity Per Rnd (5), Gelatin Color (MMS), Gelatin Version (000000000+), Gelatin Description (Mango Mill), Gelatin Color2, Gelatin Color Ver2, Gelatin Color Dec 2, Ribbon Thickness (RT001), KG/RPM/HR (15.63), RPM (100.00), Soft Gel Type (SJ001), and Appearance Color (ACL00). A table below lists materials with columns for Mark, Type, Label, Claim Qua..., Claim Unit, Item, Ite..., Wt %, Vol %, Quantity i..., Pote..., Ov..., and Fill Weight. The table has three rows: 1. Material Sodium, 5,000, KG, Turmeric; 2. Material Aqua1, 2,000, L, Water; 3. Material, 0,000, L, Water. At the bottom right, there is a summary section with 'Total Serving Size' (16,666,666.667), 'Material Cost' (16.80), 'Labor Cost' (0.00), 'Total' (770.667 KG, 746.667 L), and 'Cost Per' (0.16 KG, 0.21 L).

On the header, in the *Formula* field, select or enter the formula name. Next enter the item code of the finished good. When you are developing a formula for a sample for the first time, it is possible you have not added the finished good in the *Item Master*. You can define a temporary item key as the finished good item key. Once the quotation is approved by the customer, you can create the Item and BOM.

Next, select the product type of the sample that you will produce. Based on the *Product Type*, you may need to enter specifications on the Nutra tab.



The Nutra tab is disabled for the product types *Coating*, *Gelatin*, *Powder*, and *Syrup*.

In the *Customer Code* field, enter the customer for whom the product will be developed. This again helps you to associate a sample with the customer. You might have defined the formula for a specific number of capsules. In the *Batch Size* field, enter the number of capsules used in defining the formula.

Let us now move on to the *Items* tab. This tab contains fields that hold specific details about every ingredient of your sample formula. In the *Label Claim* and *Claim Quantity* fields, you provide the name and quantity of the item which will go into the supplement fact sheets. Also, enter *Potency* and *Overage* for every ingredient.

Potency is the percentage of active ingredient present in the item.

Overage is the excess quantity of the drug/ingredient that needs to be added to compensate for storage loss.

BatchMaster ERP automatically calculates the fill weight and batch quantity for every ingredient.

Fill weight is the quantity of the formula or drug that is filled into the product.

Batch quantity is the quantity of the formula used to produce the batch.

Fill weight = Claim Qty* [1+(overage/100)]*(100/potency)

Batch Quantity = Fill Weight (calculated above) * Multiplying Factor

The Multiplying Factor varies for different product types.

- For Capsule, Soft Gel, and Tablet, the multiplying factor is the same as the Batch Size.
- For Powder, the multiplying factor is Batch Size/Serving Quantity.

14.9.1 Soft Gelatin Capsules

If you have selected the *Product Type* of your sample as *Soft Gel* in the header section, you can view the fields pertaining to soft gels on the Nutra tab.

To develop a formula for a soft gel capsule, you need to work on the following prerequisites:

- Use the *Item Master Data* and *Item Master Details* screens to create a gelatin item.
- Use the same name or naming convention to prepare an intermediate BOM and make the BOM Active.
- Prepare a formula for the gelatin item with the product type as *Gelatin*.
- Make the formula Active. You may have to send it for approval, if approval procedure has been implemented for formulation.

Mark	Type	Label ...	Claim Qua...	Claim Unit	Item ...	Ite...	Wt %	Vol %	Quantity i...	Pote...	Ov...	Fill Weight
1	Material	Sodium	5,000	KG	Turme	meric	86.505	89.286	666.667	30.000	0.000	666,666.667
2	Material	Aqua1	2,000	L	Water	Water	13.495	10.714	80.000	70.000	0.000	2,000
3	Material		0,000				0.000	0.000	0.000	0.000	0.000	0.000

Material Cost	16.80
Labor Cost	0.00
Total (KG)	770.667
Total (L)	746.667
Cost Per (KG)	0.16
Cost Per (L)	0.21

Switch to the Nutra tab. First, you need to select the desired *Capsule Size*. The lookup in this field displays all the capsule sizes that you have defined. Once you have selected the capsule size, then the fields *No of Rows Cavity* and *No of Cavities per Round* are populated accordingly. Next, you need to select the desired formula for *Gelatin Color*. This is the formula that will be used to prepare the gelatin ribbon, used in making the capsule.



The lookups in the *Gelatin Color* field will display only those formulas whose *Product Type* is Gelatin.

Now, you need to select the *Ribbon Thickness* of gelatin that should be used in making the soft gel capsule. Once you have selected the ribbon thickness, the value of the field *KG/RPM/Hr* is populated automatically. Enter the speed of the roller dye in the *RPM* field.

Select the desired *Soft Gel Type* such as “paste and oil.” Next, select the desired color for the soft gel capsule in the *Appearance Color* field. Enter the tolerance limit for fill weight (in percentage) in the *Control%* field.

Enter the average weight for 10 gel capsules. Enter the yield of gelatin formula in percentage. If the soft gel capsule is bi-colored, then enter the formula for the second gelatin color in the *Gelatin Color2* field.

Click the *Gelatin/Coating* button on the header to view information on the gelatin formula used.

Gelatin/Coating Composition

Batch Size: 50.000

#	Gelatin\Coating ID	Revision No	Item Code	Whs C...	Weight %	Qty St...	Qty Dis...	Stock ...	Disp Unit	R
1	ForGel	0000000001	GEL002	01	1,000.000	1.000	1.000	MG	MG	
2	Gel002	0000000001	RM038	01	50,000.000	50.000	50.000	MG	MG	

#	Gel/Coat ID	Description	Total Qty	Total Amount
1	ForGel	0000000001	5.145	2.3700
2	Gel002	0000000001	257.250	118.3300

Here, you can view the details of the gelatin formulas that you have selected in the *Gelatin color*, and *Gelation Color 2* fields.

14.9.2 Capsules

Just like Soft Gels, this product type has its own specifications. If you have selected the *Product Type* of your sample as *Capsule* in the header section, then these specifications will appear on the *Physical Property Analysis* screen.

The screenshot shows the 'Physical Property Analysis' window. At the top, the 'Product Type' is set to 'CAPSULE'. Below this, a table lists physical properties for the capsule, with 'Control%' set to 10.000, 'Control Range Lower' at 4.500, and 'Control Range Higher' at 5.500. The 'Physical Properties' table is as follows:

Control%	Value
Control%	10.000
Control Range Lower	4.500
Control Range Higher	5.500
Capsule Code	
Capsule Color	

Below the properties table is a table of materials:

#	Mark	Type	Label Claim	Claim Quantity	Claim Unit	Item Code	Item Description	Wt %	Vol %	Quantity in Stock UOM	Potency %
1		Material	Sodium	5.000	KG	Turmeric	Turmeric	86.505	89.286	666.667	30.000
2		Material	Aqua1	2.000	L	Water	Water	13.495	10.714	80.000	70.000
3		Material		0.000				0.000	0.000	0.000	0.000

At the bottom right, a summary table shows:

Total Serving Size		16,666,668.667	
Material Cost			16.80
Labor Cost			0.00
Total	(KG)	770.667	(L) 746.667
Cost Per	(KG)	0.16	(L) 0.21

You need to enter the item code of the hard gelatin capsule, in the *Cap Code* field. A Capsule is a purchased item so the search feature in this field will display items associated with the Item Group selected here. You can see that the *Capsule Color* field displays the description of the capsule code selected. It is drawn from the *Item Description* field of the *Item Master Details* screen. Enter the weight of the empty capsule. Then, enter the tolerance limit for fill weight, in percentage, in the *Control%* field.

14.9.3 Tablets

Like soft gels and hard gels, the specifications of tablets appear on the *Physical Property Analysis* screen, if you have chosen *Tablet* as the *Product Type* for your sample.

4	▲	Mark	Type	Label Claim	Claim Quantity	Claim Unit	Item Code	Item Description	Wt %	Vol %	Quantity in Stock UOM	Potency %
1	<input type="checkbox"/>		Material	Sodium	5.000	KG	Turmeric	Turmeric	86.505	89.286	666.667	30.000
2	<input type="checkbox"/>		Material	Aqua1	2.000	L	Water	Water	13.495	10.714	80.000	70.000
3	<input type="checkbox"/>		Material		0.000				0.000	0.000	0.000	0.000

First, you need to enter the *Thickness* of the tablet. Next, select the *Tablet Size*. The lookup in this field will display all records from the *Tablet Size Master* screen. After tablet size, you need to select the desired *Tablet Shape*. The lookup in this field will display all records from the *Tablet Shape Master* screen.

Let us now move on to coating formulas. A tablet may need to be coated multiple times and each time with a different formula. Enter the coating formulas, one by one, in the *Coating1*, *Coating2*, and *Coating3* fields.



The lookups in the Coating fields will display only those formulas whose *Product Type* is Coating.

Once you have specified the formulas for coatings, enter the percentage of weight gained in each of these coatings, in the *Weight Gain%1*, *Weight Gain%2*, and *Weight Gain%3* fields.

Next, enter the *Hardness* of the tablet. Hardness is the property of a material to hold all its constituents intact. Also, in the *Disintegration* field, enter the time taken by the tablet to disintegrate and release medicine. Then, enter the tolerance limit for fill weight (in percentage) in the *Control%* field.

Click the *Gelatin/Coating* button in the header area to view the coating information of tablets.

Gelatin/Coating Composition

Batch Size: 50,000

#	Gelatin\Coating ID	Revision No	Item Code	Whs C...	Weight %	Qty St...	Qty Dis...	Stock ...	Disp Unit	R
1	Coating-Cellulose	0000000002	Cellulose	01	5,500.000	5.500	5.500	MG	MG	
2	Coating-Wax	0000000001	Coating Wax	01	5,500.000	5.500	5.500	MG	MG	

#	Gel/Coat ID	Description	Total Qty	Total Amount
1	Coating-Cellulose 0000000002		0.000	0.0000
2	Coating-Wax 0000000001		0.000	0.0000

Here you can view the details associated with the coating formulas that you've selected in the *Coating 1*, *Coating 2*, and *Coating 3* fields.

14.9.4 Supplement Fact Sheet

You can generate a supplement fact sheet right from the *Physical Property Analysis* screen. To do so, right-click anywhere on the screen and select the *Supplement Fact Sheet* option.

Physical Property Analysis

Formula: SG1, FG Code: VMS01, Status: Experimental

Description: sd, Product Id: [Red Box], Refresh Price, Make Active

Revision: 000000001, Product Type: TABLET [Red Box]

RM Cost By: Price List 01, Customer Code, Batch Size: 40.000

Interim Cost By: Price List 01, Calculate Cost, Calculate Batch Qty., Gelatin/Coating

Owner: manager, Toggle to System Unit

#	Mark	Type	Label Claim	Claim Quantity	Claim Unit	Item Code	Item Description	Wt %	Vol %	Quantity in Stock UOM	Potency %
1		Material	Sodium	5.000	KG	Turmeric	Turmeric	86.505	89.286	666.667	30.000
2		Material	Aqua1	2.000	L	Water	Water	13.495	10.714	80.000	70.000
3		Material		0.000				0.000	0.000	0.000	0.000

Physical Properties (Red Box):

- Weight Gain% 2: 0.000
- Coating3
- Coating3 Revision
- Coating3 Description
- Weight Gain% 3: 0.000
- Control%: 10.000
- Control Range Lower: 4.500
- Control Range Higher: 5.500
- Thickness: 0.25
- Tablet Size: TC001
- Tablet Shape
- Hardness

Total Serving Size: 16,666,668.667

Material Cost: 16.80

Labor Cost: 0.00

Total (KG): 770.667 (L): 746.667

Cost Per (KG): 0.16 (L): 0.21

Update, Cancel, View Complete Formula

You can use the *Supplement Fact Sheet* screen to obtain formula-specific item-wise details, such as the nutrition value of ingredients, serving size, and servings per container.

Supplement Fact Sheet

Formula Key: SG1, Description: sd

Serving Size: 1, Servings per container: 50.000

Column Wise Text

#	Text	Amount Per Serving	% Daily value	User1	User2	User3	U.
1	Turmeric Sodium		10.000				
2	Water Aqua1		18.000				
3			0.000				

Daily Values: 11.8

Other Ingredients

Print, Cancel

You can view the formula key of the sample in the header of the screen. Enter the *Serving Size* of the supplement/product. Then, enter an estimated number of servings available in each container of the product/formula, in the *Servings Per Container* field.

Serving Size is the quantity of the formula to be consumed in one serving.

Next, you need to select the desired option: *Column Wise* or *Text*, to choose whether you would like to display the information in multiple columns of a table/grid or in a read-only paragraph format. **The grid displays only those ingredients for which the label information is maintained in the *Physical Property Analysis screen, Items tab, grid.***

For every ingredient in the grid, you need to enter the quantity of the ingredient to be consumed in each serving, in the *Amount Per Serving* field and the percentage of ingredient quantity to be consumed in each serving, in the *%Daily Value* field.

Enter the quantity of the formula/product to be consumed in each serving, in the *Daily Values* field. In the *Other Ingredients* field, you can view those ingredients for which no value has been specified in the *Label Claim* field of the *Physical Property Analysis screen.*

Once you have specified the above details in the *Supplement Fact Sheet* screen, click the *Print* button to generate the Supplement Fact Sheet.

SUPPLEMENT FACTS		
NutraSuper		
Serving Size	Servings Per Container	50.000000
Text	Amount Per Serving	% Daily Value
Calcium Source	Calcium Carbonate	10.00
VitD3 Source	Lanolin	12.00
Vit-A Source	Retinyl Palmitate	12.00
OTHER INGREDIENTS : Vit-C Source		
DAILY VALUES: 11.8		

15 Supplement Fact Sheet

Supplements are products intended to complement the diet, containing such ingredients as vitamins, minerals, herbs. In Nutraceutical industries, for compliance with regulatory requirements, you need to print a supplement fact sheet to exhibit the contents of supplements in a specified formula or finished good.

BatchMaster Enterprise lets you print a supplement fact sheet including details such as name and quantity of ingredients present in the product that have daily dietary requirement values, serving size, and servings per container. In sequence, it lists nutrients like total calories, calories from fat, total fat, saturated fat, cholesterol, sodium, total carbohydrate, dietary fiber, sugars, protein, vitamin A, vitamin C, calcium, and iron, if present in measurable amounts. Following the listing of dietary ingredients, it also displays other dietary ingredients that do not have daily values.

15.1 Key Terms

Serving Size: One serving of a dietary supplement equals the maximum appropriate or recommended amount listed for consumption per dose. Say, serving size would be 2 tablets if directions on the label suggested an intake of 1-2 tablets daily.

Serving per container: Provides the number of Servings in the container.

%DV: Percentage of daily reference value of dietary ingredients consumed per serving of a formula/product.

= (Calculated label claim Value at Print supplement fact sheet * 100) / Standard Value of selected Profile for the property (as Maintained at Profile Master)

15.2 Profile Master

Using the *Profile Master* screen you can define various profiles such as adult, child, for which supplement fact sheets need to be generated. On the screen you can select the finished good formula and specify the nutritional value of its constituents.

#	Item Code	Item Description	Standard DV
1	Omega 3	Omega 3	0.030
2	BEESWAX	BEESWAX	0.015
3	D-Glucoamine	D-Glucoamine	0.032
4	Turmeric	Turmeric	0.021
5	Chondroitin Sulphate	Chondroitin Sulphate	0.044
6	Soyabean Oil	Soyabean Oil	0.005

#	Group Key	Group Standard DV	Group Unit	Nutrient	Unit	Standard...
1	Basic_Comp	3.000	mg	Protein	mg	4.
2	Sat_Fat	1.700	mg	Vitamin E (alpha-t	mg	0.
3	G001	2.500	mg	Carbohydrate by	mg	1.

If you have imported the standard profiles for the supplement fact sheet from the *Formula Defaults* screen then for the imported profiles the *Profile Master* screen displays the *Reimport Profile* button.

Profile Master (Supplement Fact)

Profile Id: ADULTS AND CHILDREN >=4 YE
 Description: Adults and children >=4 years
 Formula Id:
 Revision No:
 Reimport Profile


#	Item Code	Item Description	Standard...
1			

#	Group Key	Group Standard DV	Group Unit	Nutrient	Unit	Standard...
1		0.000		➔ Total lipid (fat)	g	178.
2		0.000		➔ Carbohydrate by	g	1,275.
3		0.000		➔ Ash	g	0.
4		0.000		➔ Energy	kcal	0.
5		0.000		➔ Starch	g	0.
6		0.000		➔ Glucose (dextrose)	g	0.
7		0.000		➔ Fructose	g	0.
8		0.000		➔ Lactose	g	0.
9		0.000		➔ Maltose	g	0.

OK Cancel

15.2.1 Maintaining the Profile Master

1. Enter a unique identification key of the profile and its description in the *Profile ID* and *Description* fields respectively.
2. Using the *Formula* Lookup select the formula for which the profile is required to be maintained.
3. In the upper grid, the formula ingredients for which label claim value are specified on the *Physical Property Analysis* screen are auto-populated. If required, modify the standard daily values.
4. To add more items, click the *Add line* button. This will insert a blank line in the grid. Obtain the required item and specify the Standard Daily values.
5. To delete any existing line in the grid, select it and click the *Delete Line* button.

6. In the lower grid, nutrients/nutrient group, for which *Use in Supplement Fact* checkbox is checked on the *Material Property Master* Screen, are displayed.
 7. Specify their standard daily values and unit in the respective fields.
-  *The Group Standard DV value should be unique for the same Group Key.*
8. Use the *Add line/Delete Line* button to add or delete the required item/nutrient.
 9. For the Profile you have imported from the *Formula Defaults* the *Reimport* button gets displayed. Clicking on it will overwrite the values specified on the screen with the standard data values.
 10. Click the *Save* button to save the record.

15.3 Material Property Master

On the *Material Property Master* screen, *Use in supplement Fact* checkbox lets you specify that the respective property can be printed on a Supplementary Fact Sheet.

Go To: Laboratory → Physical Property Master

Physical Property Master

#	Description	Type	Factor	Tag Name	Prop ...	Group	Use In Supplem...
T1	Protein	Weight	2.750	Pro	g	Basic_comp	<input checked="" type="checkbox"/>
T2	Vitamin A	Volume	1.250	Vit_A	g	Basic_comp	<input checked="" type="checkbox"/>
T3	Fat	Weight	3.340	Fat	g	Sat_Fat	<input checked="" type="checkbox"/>
T4	Carbohydrate	Weight	4.600	Carb	g	G001	<input checked="" type="checkbox"/>
T5	Fibre	Constant	1.000	Fibre	kcal	Other_Nutr	<input checked="" type="checkbox"/>
T6	Starch	Weight	1.000	STARCH	g		<input type="checkbox"/>
T7	Sucrose	Weight	1.000	SUCS	g		<input type="checkbox"/>
T8	Glucose (dextrose)	Weight	1.000	GLUS	g		<input type="checkbox"/>
T9	Fructose	Weight	1.000	FRUS	g		<input type="checkbox"/>
T10	Lactose	Weight	1.000	LACS	g		<input type="checkbox"/>
T11	Maltose	Weight	1.000	MALS	g		<input type="checkbox"/>
T12	Alcohol ethyl	Weight	1.000	ALC	g		<input type="checkbox"/>
T13	Water	Weight	1.000	WATER	g		<input type="checkbox"/>
T14	Adjusted Protein	Weight	1.000		g		<input type="checkbox"/>
T15	Caffeine	Weight	1.000	CAFFN	mg		<input type="checkbox"/>
T16	Theobromine	Weight	1.000	THEBRN	mg		<input type="checkbox"/>

OK Cancel

15.4 Formula Defaults

You can import the standard Profile on *Supplement Fact sheet* by using the *Import Profile* button. The imported profiles will be copied as the default profiles on the *Profile Master* screen.

Formula Defaults

General Costing Navigation

Activate Approval Procedures Activate Advance Boilerplate
 Show Consumables Activate Advance BMR

Warehouse 01
Policy A
Class FC1
Yield 100.000
Loss Factor 0.000
Loss Constant 0.000

Safety
HMIS Health Moderate
HMIS Chronic Factor Chronic
HMIS Flammability
HMIS Reactivity Mild
HMIS Personal Protection

Import Profile(Supp)

OK Cancel

15.5 Printing Supplement Fact Sheet

The nutrition label of a dietary supplement is the Supplement Fact Sheet. You can print a Supplement Fact Sheet in 5 distinct formats, each contributing specific details.

The *Physical Property Analysis* screen has a special function button to launch a Supplement Fact Sheet for the formula. The steps for printing a Supplement Fact Sheet are as follows:

Go To: Laboratory → Physical Property Analysis.

1. Open the *Physical Property Analysis* screen.
2. Select the Formula Key of the finished good item for which a supplement fact sheet needs to be printed.

Physical Property Analysis

Formula: Turmeric Capsule FG Code: Status: Development

Description: Turmeric Capsule Project Id: Refresh Price Make Active

Revision: 000000003 Product Type: RM Cost By: Price List 01 Customer Code: Batch Size: 10,000 Calculate Batch Qty. Owner: manager

Intermediate Cost By: Price List 01 Calculate Cost Serving Size: 0.000 Toggle to System Unit

Mark	Type	L	Claim Quantity	Claim Unit	Item Code	Item Description	WT %	Vol %	Quantity in Stock UOM
1	Material		23,000	G	Omega3	Omega3	14.375	14.375	0.230
2	Material		10,000	G	BEEWAX	BEEWAX	6.250	6.250	0.100
3	Material		30,000	G	D-Glucoamine	D-Glucoamine	18.750	18.750	0.300
4	Material		40,000	G	Turmeric	Turmeric	26.250	26.250	0.400
5	Material		18,000	G	Chondroitin Sulphate	Chondroitin Sulphate	11.250	11.250	0.180
6	Material		25,000	G	Soybean Oil	Soybean Oil	15.625	15.625	0.250
7	Material		12,000	G	GLYCERYL	GLYCERYL	7.500	7.500	0.120
8	Material								
							100.000	100.000	

Select All

Remarks:

Total Serving Size: 160,000,000

Material Cost	0.00
Labor Cost	0.00
Total (K/G)	1.400 (L)
Cost Per (K/G)	0.00 (L)

View Complete Formula

3. Right click on the screen and choose the *Supplement Fact Sheet* option from the pop-up list.

4. The *Supplement Fact Sheet* screen appears as below.

Supplement Fact Sheet

Formula Key: For_Turmeric_Capsule For_Turmeric_Capsule
Revision: 0000000003
Report Type: Report1 View Report Format

Profile

#	Profile ID	Profile Description
1	ADULTS AND CHILDREN	Adults and children >=4 years

Copy From Revision
Evaluate
Expand Intermediate
Reset

Serving Size: 1.000 TBS
Serving Size Text: O_Scoop
Serving/Container: 10

Green - Intermediate Item

#	Group ID	Group Hea...	Group Seque...	Ingredient/Description	Fanciful	Label Cl...	Unit	Se...	Print Ingredient	Print ...
1	0		0	BEESWAX	42	3.000		1	<input checked="" type="checkbox"/>	
2	0		0	Chondroitin Sulphate		20.000		2	<input checked="" type="checkbox"/>	
3	0		0	D-Glucoamine		1.000		3	<input checked="" type="checkbox"/>	
4	0		0	GLYCERYL		10.000		4	<input checked="" type="checkbox"/>	
5	0		0	Omega3	12	20.000	KG	5	<input checked="" type="checkbox"/>	

#	Group Key	Group Label Claim	Group Unit	Group Sequence	Property

Other Ingredients:
Remark:

OK Cancel Print

- Using the *Report Type* dropdown, select the report you wish to print, from the 5 standard formats you can choose from. You can use the *View Report Format* button to see the layout of the selected report.
- Select the required *Profile*. You can add *n* number of profiles here. Each profile added will be a new column in the report.
- Specify the recommended amount of dietary supplement in the *Serving Size* field and select its measuring unit using the lookup button. If you have specified the *Serving Size* value and units at the *Physical Property Analysis* screen then those values will be copied here in the respective fields.

8. Use the *Serving Size Text* field to enter details related to serving size. Note that the text you specify in this field will overwrite the Serving Size value on the report.
9. Enter the quantity of servings in a container in the *Servings Per container* field.
10. Click the *Evaluate* button.
11. The upper grid displays the formula material items for which a label claim value is specified on the *Physical Property Analysis* screen, while in the lower grid the nutrition properties and groups, for which the *Use in Supplement* checkbox is checked on the Material Property Master screen, are displayed.
12. In the *Group Sequence* field enter the printing order of item and nutrition properties. It signifies the order in which they will be printed on the report. Note that, irrespective of the Group sequence number you specified for an item, the system will always print all nutrient property preceding items.
13. Specify the Group Heading with respect to the Group ID. The title you specify here will be displayed as the section head on the report.
14. The *Text* field is defaulted with the name/description of an ingredient. If required, you can modify it. Every time you modify the text, it will be added in the master list and can be reused further via the respective field lookup.
15. To print the report for any other revision of the formula, click on the *Copy from Revision* button. This will open the formula lookup window from where you can select the required version.
16. You can click on the *Expand intermediate* button to see intermediate details of the selected item. For the item, if the BOM has already been released, then on clicking this button the *Expand Intermediate* screen pops up. From this screen you can choose the items required to be displayed on the report. Also, the *Include Label Claim* checkbox is available to print the Label claim on the report.

15.5.1 Understanding the Supplement Fact sheet with an example.

Recall the Formula on the *Physical Property Analysis* screen and specify the Label Claim value of formula items.



Items for which you don't enter the label claim value will not be retrieved in the grid of *Print Supplement Fact Sheet* and will be printed as an *Other Ingredients* item on the report.

Say, for our finished good formula key 'Turmeric Capsule', we have specified label claim values for the item keys *Omega 3*, *D-glucoamine*, *Turmeric*, *Chondroitin Sulphate*, *Soyabean Oil* but left it blank for item keys *Bees Wax* & *Glyceryl*.

Physical Property Analysis

Formula: Turmeric Capsule FG Code: Status: Development: Refresh Price Make Active

Description: Turmeric Capsule Project Id: Product Type: GELATIN Customer Code: Batch Size: 1,614,000 Calculate Batch Qty. Owner: manager

Revision: 000000003 RM Cost By: Price List 01 Intermediate Cost By: Price List 01 Calculate Cost

Items	Labor	By Products	Revision	QC test	Attributes	Allergens/Ingredients																												
<table border="1"> <thead> <tr> <th>Property</th> <th>Value</th> </tr> </thead> <tbody> <tr><td>1 Protein</td><td>0.062</td></tr> <tr><td>2 Vitamin A</td><td>0.112</td></tr> <tr><td>3 Fat</td><td>0.257</td></tr> <tr><td>4 Carbohydrates</td><td>0.449</td></tr> <tr><td>5 Constant</td><td>1.310</td></tr> <tr><td>6 Starch</td><td>0.000</td></tr> <tr><td>7 Sucrose</td><td>0.000</td></tr> <tr><td>8 Glucose (dextrose)</td><td>0.000</td></tr> <tr><td>9 Fructose</td><td>0.000</td></tr> <tr><td>10 Lactose</td><td>0.000</td></tr> <tr><td>11 Maltose</td><td>0.000</td></tr> <tr><td>12 Alcohol ethyl</td><td>0.000</td></tr> <tr><td>13 Water</td><td>0.000</td></tr> </tbody> </table>							Property	Value	1 Protein	0.062	2 Vitamin A	0.112	3 Fat	0.257	4 Carbohydrates	0.449	5 Constant	1.310	6 Starch	0.000	7 Sucrose	0.000	8 Glucose (dextrose)	0.000	9 Fructose	0.000	10 Lactose	0.000	11 Maltose	0.000	12 Alcohol ethyl	0.000	13 Water	0.000
Property	Value																																	
1 Protein	0.062																																	
2 Vitamin A	0.112																																	
3 Fat	0.257																																	
4 Carbohydrates	0.449																																	
5 Constant	1.310																																	
6 Starch	0.000																																	
7 Sucrose	0.000																																	
8 Glucose (dextrose)	0.000																																	
9 Fructose	0.000																																	
10 Lactose	0.000																																	
11 Maltose	0.000																																	
12 Alcohol ethyl	0.000																																	
13 Water	0.000																																	
1	30.000	MG	Omega3	Omega3	22.388	22.388	0.030	0.1																										
2	0.000	MG	BEESWAX	BEESWAX	0.000	0.000	0.000	0.1																										
3	23.000	MG	D-Glucoamine	D-Glucoamine	17.164	17.164	0.023	0.1																										
4	42.000	MG	Turmeric	Turmeric	32.090	32.090	0.040	0.1																										
5	14.000	MG	Chondroitin Sulphate	Chondroitin Sulph	10.448	10.448	0.014	0.1																										
6	24.000	MG	Soyabean Oil	Soyabean Oil	17.910	17.910	0.024	0.1																										
7	0.000	MG	GLYCERYL	GLYCERYL	0.000	0.000	0.000	0.1																										
8	0.000				0.000	0.000	0.000	0.1																										
						100.000	100.000																											

Material Cost: 0.00
 Labor Cost: 0.00
 Total (K/G): 0.134 (L): 0.134
 Cost Per (K/G): 0.00 (L): 0.00

View Complete Formula

As the dietary value of ingredients is always printed in the context of age group, let's define a profile 'Adult001'. On the *Profile Master (Supplement Fact)* screen, as soon as we select the formula, the formula ingredients for which label claim values are specified are auto-populated in the upper grid. In the lower grid nutrients/nutrient groups for which the *Use in Supplement Fact* checkbox is marked are displayed.

Profile Master (Supplement Fact)

Profile Id: Adult
 Description: Adult
 Formula Id: Turmeric_Capsule
 Revision No: 000000001

#	Item Code	Item Description	Standard...
1	Omega 3	Omega 3	
2	BEESWAX	BEESWAX	
3	D-Glucoamine	D-Glucoamine	
4	Turmeric	Turmeric	
5	Chondroitin Sulphate	Chondroitin Sulphate	
6	Soyabean Oil	Soyabean Oil	

#	Group Key	Group Standard DV	Group Unit	Nutrient	Unit	Standard...
1	Basic_Comp	3.000	mg	Protein	mg	4.
2	Sat_Fat	1.700	mg	Vitamin E (alpha-t	mg	0.
3	G001	2.500	mg	Carbohydrate by	mg	1.

Update Cancel

You can add or delete a required item/nutrient using the *Add Row/Delete Row* option, available on right click. If required, modify the standard DV values and save the record.

Now open the *Physical Property Analysis* screen and select the required formula. Click the *Print Supplement Fact Sheet* button on the toolbar.

The *Print Supplement Fact Sheet* screen appears.

Supplement Fact Sheet

Formula Key: Turmeric Capsule Turmeric Capsule

Revision: 0000000001

Report Type: Report1 [View Report Format](#)

Profile

#	Profile ID	Profile Description
1	Adult	Adult

[Copy From Revision](#)
[Evaluate](#)
[Expand Intermediate](#)
[Reset](#)

Serving Size: 1.000 TBS

Serving Size Text:

Serving/Container:

■ Green - Intermediate Item

#	Group ID	Group Hea...	Group Seque...	Ingredient/Description	Fanciful	Label Cl...	Unit	Se...	Print Ingredient	Print ...
1	0		0	BEESWAX	42	3.000		1	<input checked="" type="checkbox"/>	
2	0		0	Chondroitin Sulphate		20.000		2	<input checked="" type="checkbox"/>	
3	0		0	D-Glucoamine		1.000		3	<input checked="" type="checkbox"/>	
4	0		0	GLYCERYL		10.000		4	<input checked="" type="checkbox"/>	
5	0		0	Omega3	12	20.000	KG	5	<input checked="" type="checkbox"/>	

#	Group Key	Group Label Claim	Group Unit	Group Sequence	Property

Other Ingredients:

Remark:

[Add](#) [Cancel](#) [Print](#)

The screen is defaulted with the selected revision of the formula. If you wish to use any other revision of the formula, click the *Copy From Revision* button. It will pop up a window from where you can select the desired revision.

On the *Supplement Fact* screen, the *Report Type* option is available to choose the format in which the report is required to be printed. The report can be printed in 5 distinct formats.

You can preview the selected report format using the *View Report format* button.

Supplement Fact Sheet

Formula Key: For_Turmeric_Capsule For_Turmeric_Capsule
 Revision: 0000000003
 Report Type: Report1 View Report Format

Profile

Serving Size
 Serving Size Text
 Serving/Container

#	Group ID	Gr
1	0	
2	0	
3	0	
4	0	
5	0	

Group Key

Other Ingredients

OK

Report Format

Supplement Facts

Serving Size 1 Tablet

	Amount Per Serving	% Daily Value
Vitamin A (as retinyl acetate and 50% as beta-carotene)	5000 IU	100%
Vitamin C (as ascorbic acid)	60 mg	100%
Vitamin D (as cholecalciferol)	400 IU	100%
Vitamin E (as dl-alpha tocopheryl acetate)	30 IU	100%
Thiamin (as thiamin mononitrate)	1.5 mg	100%
Riboflavin	1.7 mg	100%
Niacin (as niacinamide)	20 mg	100%
Vitamin B ₆ (as pyridoxine hydrochloride)	2.0 mg	100%
Folate (as folic acid)	400 mcg	100%
Vitamin B ₁₂ (as cyanocobalamin)	6 mcg	100%
Biotin	30 mcg	10%
Pantothenic Acid (as calcium pantothenate)	10 mg	100%

Other ingredients: Gelatin, lactose, magnesium stearate, microcrystalline cellulose, FD&C Yellow No. 6, propylene glycol, propylparaben, and sodium benzoate.

In the profile grid, add the profile for which the report needs to be printed. You can add multiple profiles in the grid.

Enter the required value in *Serving Size*, *Serving Size Text* and *Serving /Container* fields.

Supplement Fact Sheet

Formula Key: Turmeric Capsule | Turmeric Capsule

Revision: 000000003

Report Type: Report1 [View Report Format]

Profile

#	Profile ID	Profile Description
1	Adult001	Adult001

Serving Size: 10.000 G

Serving Size Text: 1 Capsule

Serving/Container: 30 Servings

Buttons: Copy From Revision, Evaluate, Expand Intermediate, Reset

Green - Intermediate Item

#	Group ID	Group Heading	Group Sequence	Ingredient/Descr...
---	----------	---------------	----------------	---------------------

Click the *Evaluate* button. On the basis of the Serving size specified, the system will calculate the label claim amount of nutrients. The label claim value of the Ingredient item is obtained from the *Physical Property Analysis* screen.

Supplement Fact Sheet

Formula Key: Turmeric Capsule | Turmeric Capsule

Revision: 000000003

Report Type: Report1 [View Report Format]

Profile

#	Profile ID	Profile Description
1	Adult001	Adult001

Serving Size: 10.000 G

Serving Size Text: 1 Capsule

Serving/Container: 30

Buttons: Copy From Revision, Evaluate, Expand Intermediate, Reset

Green - Intermediate Item

#	Group ID	Group Heading	Group Sequence	Ingredient/Description	Literal Text	Label Claim	Unit	Sequence
1	0		0	Chondroitin Sulphate		14.000	MG	6
2	0		0	D-Glucoamine		23.000	MG	7
3	0		0	Omega3		30.000	MG	8
4	0		0	Soyabean Oil		24.000	MG	9
5	0		0	Turmeric		42.000	MG	10

#	Group Key	Group Label Claim	Group Unit	Group Sequence	Property	Label Claim	Unit	Sequence
1	G001	0.034	mg	0	Carbohydrate	0.034	mg	1
2	Sat_Fat	0.022	mg	0	Fat	0.022	mg	2
3	Other_Nutr	0.001	mg	0	Fibre	0.001	kcal	3
4	Basic_comp	0.013	mg	0	Protein	0.005	mg	4
5	Basic_comp	0.013	mg	0	Vitamin A	0.008	mg	5

Other Ingredients: GLYCERYL , BEESWAX

Remark: Report 1 for Turmeric Capsule

Buttons: OK, Cancel, Print

In the *Group heading* field, you can specify the title of the group. The *Group ID*, *Group Heading* and *Group Sequence* of the items you are grouping should be identical. Say in the screen below, we grouped items *D-Glucoamine*, *Soyabean oil* under 'PTA' group. Their *Group ID*, *Group Heading* and *Group Sequence* are same.

#	Group ID	Group Heading	Group Sequence	Ingredient/Description	Literal Text	Label Claim	Unit	Sequence
1				Chondroitin Suplphate		14.000	MG	6
2	2	PTA	2	D-Glucoamine		23.000	MG	7
3				Omega3		30.000	MG	8
4	2	PTA	2	Soyabean Oil		24.000	MG	9
5				Turmeric		42.000	MG	10

Similarly, in the lower grid we can group the nutrient properties. In the screen below we grouped Nutrient properties *Protein* and *Vitamin A* under the '*Basic_comp*' group. Their *Group key* and *Group sequence* are similar.

#	Group Key	Group Label ...	Group Unit	Group Seq...	Property	Label C...	Unit	Sequ...	Type	Total
1	G001	0.000	mg	0	Carbhohydrate	0.034	mg	1	Nutrient	<input type="checkbox"/>
2	Sat_Fat	0.000	mg	0	Fat	0.022	mg	2	Nutrient	<input type="checkbox"/>
3	Other_Nutr	0.000	mg	0	Fibre	0.001	kcal	3	Nutrient	<input type="checkbox"/>
4	Basic_comp	0.013	mg	1	Protein	0.005	mg	4	Nutrient	<input checked="" type="checkbox"/>
5	Basic_comp	0.013	mg	1	Vitamin A	0.008	mg	5	Nutrient	<input checked="" type="checkbox"/>

The *Group Sequence* field signifies the printing order of items and nutrient groups on the report. On the report, Nutrient properties are always printed before item properties. The system defaults the sequence of nutrients and items such that the nutrient sequence is preceded by the item.

If grouping is implemented on Nutrients properties, the system will print Group-wise nutrient properties after item properties. If grouping is performed on nutrient as well as item, the printing sequence will be Nutrient property, Item property, Nutrient group and lastly Item group.

#	Group ID	Group Heading	Group Sequence	Ingredient/Description	Fanciful	Label Claim	Unit	Sequence
1				Chondroitin Suplphate		14.000	MG	6
2	2	PTA	2	D-Glucoamine		23.000	MG	7
3				Omega3		30.000	MG	8
4	2	PTA	2	Soyabean Oil		24.000	MG	9
5				Turmeric		42.000	MG	10

#	Group Key	Group Label ...	Group Unit	Group Seq...	Property	Label C...	Unit	Sequ...	Type	Total
1	G001	0.000	mg	0	Carbohydrate	0.034	mg	1	Nutrient	<input type="checkbox"/>
2	Sat_Fat	0.000	mg	0	Fat	0.022	mg	2	Nutrient	<input type="checkbox"/>
3	Other_Nutr	0.000	mg	0	Fibre	0.001	kcal	3	Nutrient	<input type="checkbox"/>
4	Basic_comp	0.013	mg	1	Protein	0.005	mg	4	Nutrient	<input checked="" type="checkbox"/>
5	Basic_comp	0.013	mg	1	Vitamin A	0.008	mg	5	Nutrient	<input checked="" type="checkbox"/>

In the example above, items *Soyabean Oil* and *D-Glucoamine* are grouped under 'PTA' group, while the nutrient properties 'Protein' and 'Vitamin A' are grouped under 'Basic_Comp' Group. The supplement fact sheet report is therefore printed as below.

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30		
	Amount Per Serving	% Daily Value
Carbohydrate	0.03 mg	3%
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Chondroitin Suplphate	14.00 MG	17%
Omega3	30.00 MG	79%
Turmeric	42.00 MG	86%
Basic_comp	0.01 mg	†
Protein	0.00 mg	1%
Vitamin A	0.01 mg	2%
PTA	47 MG	†
D-Glucoamine		
Soyabean Oil		
† Daily Value not established		
Other Ingredients: GLYCERYL, BEESWAX		
Report 1 for Turmeric Capsule		

In the *Other Ingredients* field, any item whose label claim value is not specified on the *Physical Property Analysis* screen, is displayed. If required, you can specify more items in the field.

The screenshot displays two windows from a software application. The left window, titled 'Physical Property Analysis', shows a form for 'Turmeric Capsule' with various input fields and a table of physical properties. The table has columns for Mark, Type, Label, Claim Quantity, Claim Unit, and Item Code. Three rows are highlighted with red boxes: Mark 2 (0.000 MG BEESWAX), Mark 7 (0.000 MG Soyabean Oil), and Mark 8 (0.000 MG GLYCERYL). The right window, titled 'Supplement Fact Sheet', shows a form for 'Turmeric Capsule' and a table of ingredients. The table has columns for Group ID, Group Heading, Group Sequence, and Ingredient/Description. A red box highlights the 'Other Ingredients' field at the bottom, which contains the text '-GLYCERYL, BEESWAX'.

In the *Remark* field, enter any note or comment. The text you specify here will be printed at the end of the report. In this field, to obtain basic effects of the font like Bold, Italic, you can paste the desired formatted text from Microsoft Word.

Remark	Report 1 for Turmeric Capsule
--------	-------------------------------

Click the *Print* button to print the desired report.

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30		
	Amount Per Serving	% Daily Value
Carbohydrate	0.03 mg	3%
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Chondroitin Sulphate	14.00 MG	17%
Omega3	30.00 MG	79%
Turmeric	42.00 MG	86%
Basic_comp	0.01 mg	†
Protein	0.00 mg	1%
Vitamin A	0.01 mg	2%
PTA	47 MG	†
D-Glucoamine		
Soyabean Oil		
† Daily Value not established		
Other Ingredients: GLYCERYL, BEESWAX		
Report 1 for Turmeric Capsule		

As we didn't specify the *Label claim* value for formula ingredients *GLYCERYL*, *BEESWAX*, they are displaying in the *Other Ingredients* section.

Use the *Expand intermediate* button to obtain details of any intermediate of the selected item for which a BOM is already released.



An Intermediate Item will be displayed highlighted in Green.

Supplement Fact Sheet

Formula Key: Turmeric Capsule Turmeric Capsule
 Revision: 000000003
 Report Type: Report1 **View Report Format**

Profile

#	Profile ID	Profile Description
1	Adult001	Adult001

Copy From Revision
Evaluate
Expand Intermediate
Reset

Serving Size: 10.000 G
 Serving Size Text: 1 Capsule
 Serving/Container: 30

Green - Intermediate Item

#	Group ID	Group Heading	Group Sequence	Ingredient/Description	Fanciful	Label Claim	Unit	Sequence
1				Chondroitin Sulphate		14.000	MG	6
2	2	PTA	2	D-Glucoamine		23.000	MG	7
3				Omega?		20.000	MG	8
4	2	PTA	2	Soyabean Oil		24.000	MG	9
5				Turmeric		42.000	MG	10

#	Group Key	Group Label ...	Group Unit	Group Seq...	Property	Label C...	Unit	Sequ...	Type	Total
1	G001	0.000	mg	0	Carbohydrate	0.034	mg	1	Nutrient	<input type="checkbox"/>
2	Sat_Fat	0.000	mg	0	Fat	0.022	mg	2	Nutrient	<input type="checkbox"/>
3	Other_Nutr	0.000	mg	0	Fibre	0.001	kcal	3	Nutrient	<input type="checkbox"/>
4	Basic_comp	0.013	mg	1	Protein	0.005	mg	4	Nutrient	<input checked="" type="checkbox"/>
5	Basic_comp	0.013	mg	1	Vitamin A	0.008	mg	5	Nutrient	<input checked="" type="checkbox"/>

Other Ingredients: GLYCERYL , BEESWAX
 Remark: Report 1 for Turmeric Capsule

OK **Cancel** **Print**

The item added is printed on the report with the intermediate item.

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30		
	Amount Per Serving	% Daily Value
Carbohydrate	0.03 mg	3%
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Chondroitin Sulphate	14.00 MG	17%
Omega3	30.00 MG	79%
Turmeric	42.00 MG	86%
Basic_comp	0.01 mg	†
Protein	0.00 mg	1%
Vitamin A	0.01 mg	2%
PLA	47 MG	†
D-Glucoamine		
Soyabean Oil(Linoleic001	0.340 mg)	
† Daily Value not established		
Other Ingredients: GLYCERYL, BEESWAX		
Report 1 for Turmeric Capsule		

15.5.1.1 Calculations

Let's have a look at the entered values.

On the *Print Supplement Fact Sheet* screen, the label claim values specified for dietary nutrients are:

Item /Nutrition Group /Nutrition Property	Label Claim	Label claim unit
Omega3	30	MG
D-Glucoamine	23	MG
Chondroitin Sulphate	14	MG
Soyabean Oil	24	MG
Turmeric	42	MG
Carbohydrate	0.034	MG
Fat	0.022	MG
Fibre	0.001	MG
Protein	0.005	MG
Vitamin A	0.008	MG

On the *Profile Master* screen, the standard deviation reference value of the profile Adult is as follows:

Item/Nutrient/Nutrient Group	Standard DV	Unit
Omega3	38	MG
D-Glucoamine	32	MG
Turmeric	49	MG
Chondroitin Sulphate	81	MG
Soyabean Oil	25	MG
Carbohydrate	1	MG
Fat	0.560	MG
Fibre	0.800	kcal
Protein	0.38	MG
Vitamin A	0.34	MG

%DV calculation

For the ingredient item Omega3:

The standard DV value specified in the profile master is = 38

The Label claim value at Print Supplement Fact Sheet is = 30

Thus for the serving size 1 Milligram percentage daily reference value of Omega3 in per serving of a formula/product is:

%DV: Percentage of daily reference value of a dietary ingredients consumed in per serving of a formula/product

= (Calculated label claim Value at Print supplement fact sheet * 100) / Standard Value of selected Profile for the property (as Maintained in the Profile Master)

$$= (30 * 100) / 38$$

$$= 78.94 \text{ or } 79\%$$

Similarly, for the nutrient Carbohydrate, % DV will be

$$= (0.034 * 100) / 1$$

$$= 3.4 \text{ or } 3\%$$

Similarly, % DV values are calculated for other dietary ingredients.

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30 Servings		
	Amount Per Serving	Adult
Energy	0.01 ENERC_KJ	1%
Sugars, total	0.01 SUGAR	1%
Other Nutrients	1.23	12%
%Protein	0.03	1%
Added Sugar	1.2	30%
%Fat	0.04	2%
Vitamin	0.03	1%
Omega 3	80 MG	89%
D-glucoamine hydrate	50 MG	45%
Turmeric	54 MG	68%
chondroitin sulfate	34 MG	36%
Protein	33 MG	†
Lecithin summer		
Soyabean oil		
† Daily Value not established		
Other Ingredients: Bees wax, Glyceryl Menostearate Flakes		

You can select the Hide column checkbox to hide % DV value from the report.

#	Group Label ...	Group Unit	Group ...	Property	Label C...	Unit	Sequ...	Type	Total	Hide Column
1	00	mg	0	Carbohydrate	0.034	mg	1	Nutrient	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	00	mg	0	Fat	0.022	mg	2	Nutrient	<input type="checkbox"/>	<input type="checkbox"/>
3	00	mg	0	Fibre	0.001	kcal	3	Nutrient	<input type="checkbox"/>	<input type="checkbox"/>
4	13	mg	1	Protein	0.005	mg	4	Nutrient	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	13	mg	1	Vitamin A	0.008	mg	5	Nutrient	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30		
	Amount Per Serving	% Daily Value
Carbohydrate	0.03 mg	
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Chondroitin Sulphate	14.00 MG	17%
Omega3	30.00 MG	79%
Turmeric	42.00 MG	86%
Basic_comp	0.01 mg	†
Protein	0.00 mg	1%
Vitamin A	0.01 mg	2%
PTA	47 MG	†
D-Glucoamine		
Soyabean Oil(Linoleic:001		
0.340 mg)		
† Daily Value not established		
Other Ingredients: GLYCERYL, BEESWAX		

Use the Total column checkbox to display selected dietary ingredients values in a group, indented to the right.

#	Group Key	Group Label ...	Group Unit	Group ...	Property	Label C...	Unit	Sequ...	Type	Total	Hi
1	G001	0.000	mg	0	Carbohydrate	0.034	mg	1	Nutrient	<input type="checkbox"/>	
2	Sat_Fat	0.000	mg	0	Fat	0.022	mg	2	Nutrient	<input type="checkbox"/>	
3	Other_Nutr	0.000	mg	0	Fibre	0.001	kcal	3	Nutrient	<input type="checkbox"/>	
4	Basic_comp	0.013	mg	1	Protein	0.005	mg	4	Nutrient	<input checked="" type="checkbox"/>	
5	Basic_comp	0.013	mg	1	Vitamin A	0.008	mg	5	Nutrient	<input checked="" type="checkbox"/>	

Supplement Facts

Serving Size 1 Capsule
 Servings Per Container 30

	Amount Per Serving	% Daily Value
Carbohydrate	0.03 mg	
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Chondroitin Sulphate	14.00 MG	17%
Omega3	30.00 MG	75%
Turmeric	42.00 MG	84%
Basic_comp	0.01 mg	†
Protein	0.00 mg	1%
VitaminA	0.01 mg	2%
PTA	47 MG	†
D-Glucoamine		
Soyabean Oil(Linoleic:001 0.340 mg)		
† Daily Value not established		
Other Ingredients: GLYCERYL, BEESWAX		

The layout of other report formats are as follows.

Report 2

Supplement Facts			
Serving Size 1 Capsule			
Servings Per Container 30			
		ADD1	ADD1
Amount Per Serving			
Basic_comp	0.01 g	†	†
Carbohydrate	0.03 g	1%	1%
Fat	0.02 g	1%	†
Fibre	0.00 kcal	†	†
Protein	0.00 g	†	†
VitaminA	0.01 g	†	†
Chondroitin Sulphate	14.00 MG	†	†
D-Glucoamine	23.00 MG	†	†
Omega3	30.00 MG	†	†
Soyabean Oil	24.00 MG	†	†
Turmeric	42.00 MG	†	†
† Daily Value not established			
Other Ingredients: GLYCERYL, BEESWAX			
Report 2 for Turmeric Capsule			

Supplement Facts		
Serving Size 1 Capsule		
Servings Per Container 30		
Amount Per Serving		
% Daily Value		
Amount Per Serving	% Daily Value	
Carbohydrate	0.03 mg	3%
Fat	0.02 mg	4%
Fibre	0.00 kcal	†
Protein	0.00 mg	1%
Vitamin A	0.01 mg	2%
Chondroitin Sulphate	14.00 MG	17%
D-Glucoamine	23.00 MG	72%
Omega3	30.00 MG	79%
Soyabean Oil	24.00 MG	96%
Tumeric	42.00 MG	86%
† Daily Value not established		
Ingredients : GLYCERYL , BEESWAX		

Report 4

Supplement Facts				
Serving Size 1 Capsule				
Servings Per Container 30				
Amount Per Serving	A001		A001	
	% Daily Value		% Daily Value	
Carbohydrate	0.03 g	1%	0.03 g	1%
Fat	0.02 g	1%	0.02 g	†
Fibre	0.00 kcal	†	0.00 kcal	†
Protein	0.00 g	†	0.00 g	†
Vitamin A	0.01 g	†	0.01 g	†
Chondroitin Sulphate	14.00 MG	†	14.00 MG	†
D-Glucoamine	23.00 MG	†	23.00 MG	†
Omega3	30.00 MG	†	30.00 MG	†
Soyabean Oil	24.00 MG	†	24.00 MG	†
Turmeric	42.00 MG	†	42.00 MG	†

† Daily Value not established

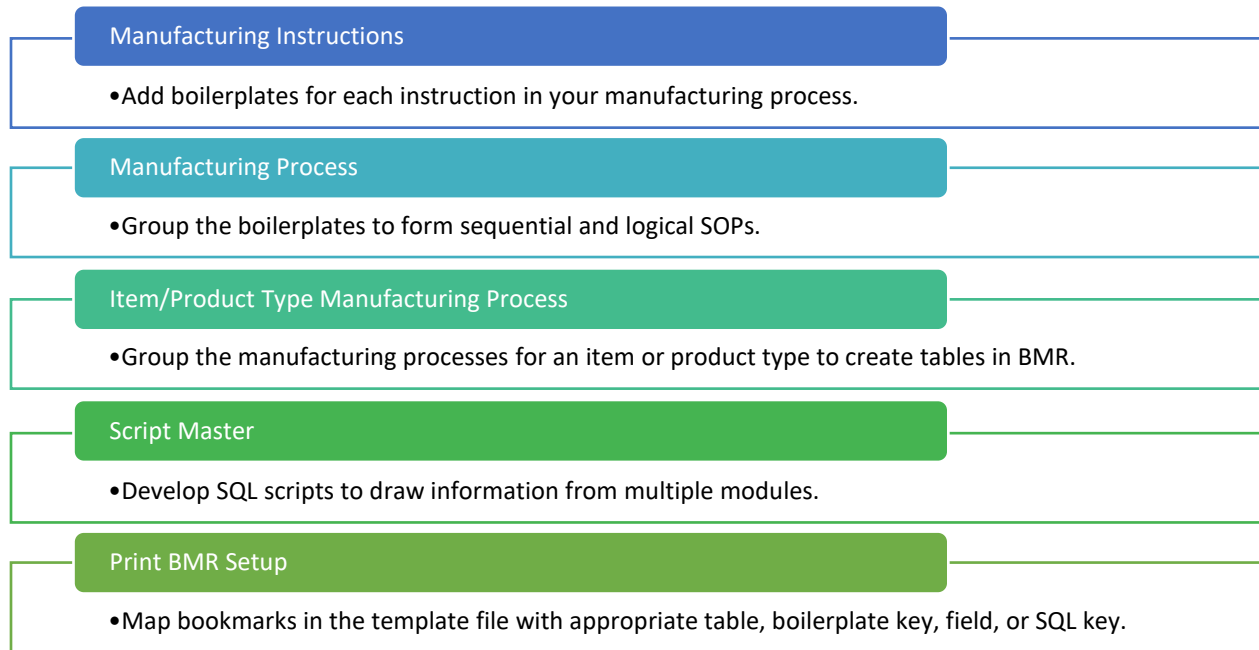
Ingredients : GLYCERYL , BEESWAX

Report 5

Supplement Facts Serving Size 1 Capsule Servings 30,
 Amount Per Serving: Carbohydrate 0.07 g, Carbohydrate 0.07 mg, Fat 0.04 g, Fat 0.04 mg, Fibre 0.00 kcal, Fibre 0.00 kcal,
 Protein 0.01 g, Protein 0.01 mg, Vitamin A 0.02 g, Vitamin A 0.02 mg, Chondroitin Sulphate 14.00 MG, D-Glucoamine 23.00 MG,
 Omega3 30.00 MG, Soyabean Oil 24.00 MG, Turmeric 42.00 MG

16 Batch Manufacturing Record

A key regulatory requirement is to record the cGMP-related activities for production batches. This is accomplished using a Batch Manufacturing Record (BMR). As part of the regulations, you are required to store BMRs for up to five years after a batch is produced. BatchMaster ERP provides the capability to create and maintain BMRs. Following is the basic flow:



Once you have provided details in the above screens, you can print a BMR for a batch in the template, using the *Print BMR* screen.



As a pre-requisite MS word must be installed on your machine to print the BMR.

16.2 Product Type/Item Mfg. Process

After creating the manufacturing process, you can now associate them with a specific item or product type. This helps you in creating tables when printing BMR for an item or product type.

Go To: Process Manufacturing → Product Type/ Item Mfg. Process

Product Type/Item Mfg.Process

Classification BMR Report

Item Code Product Type

Product Type → CAPSULE

Description CAPSULE

#	LineId	Process	Description
1	1	⇒ BMP	Capsule Manufacturing Process
2	2		

#	Select	LineId	BP ID	BP Description
1	<input type="checkbox"/>	1	⇒ BP01	Handle with care
2	<input type="checkbox"/>	2	⇒ BP02	Wear Safety glasses

Add Cancel

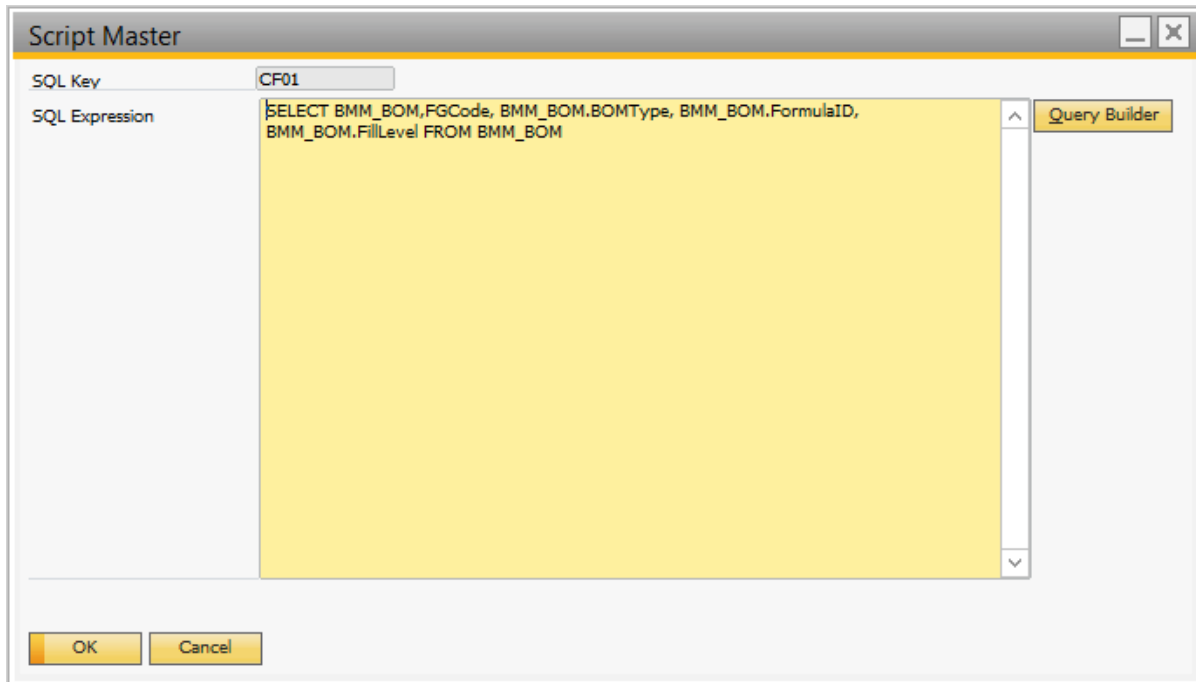
From the options *Item Code* and *Product Type*, select the required one to classify the BMR report information. Then select the item or product type in the following field.

In the first grid, add the manufacturing processes in the required sequence to define the procedure for handling the item/product type. In the *Process* field, select the required group of manufacturing instructions. Based on the item/group you have selected in first grid, the second grid will contain the line-level instructions. Click the *Add* button to add the set of instructions. Click the *OK* button to exit.

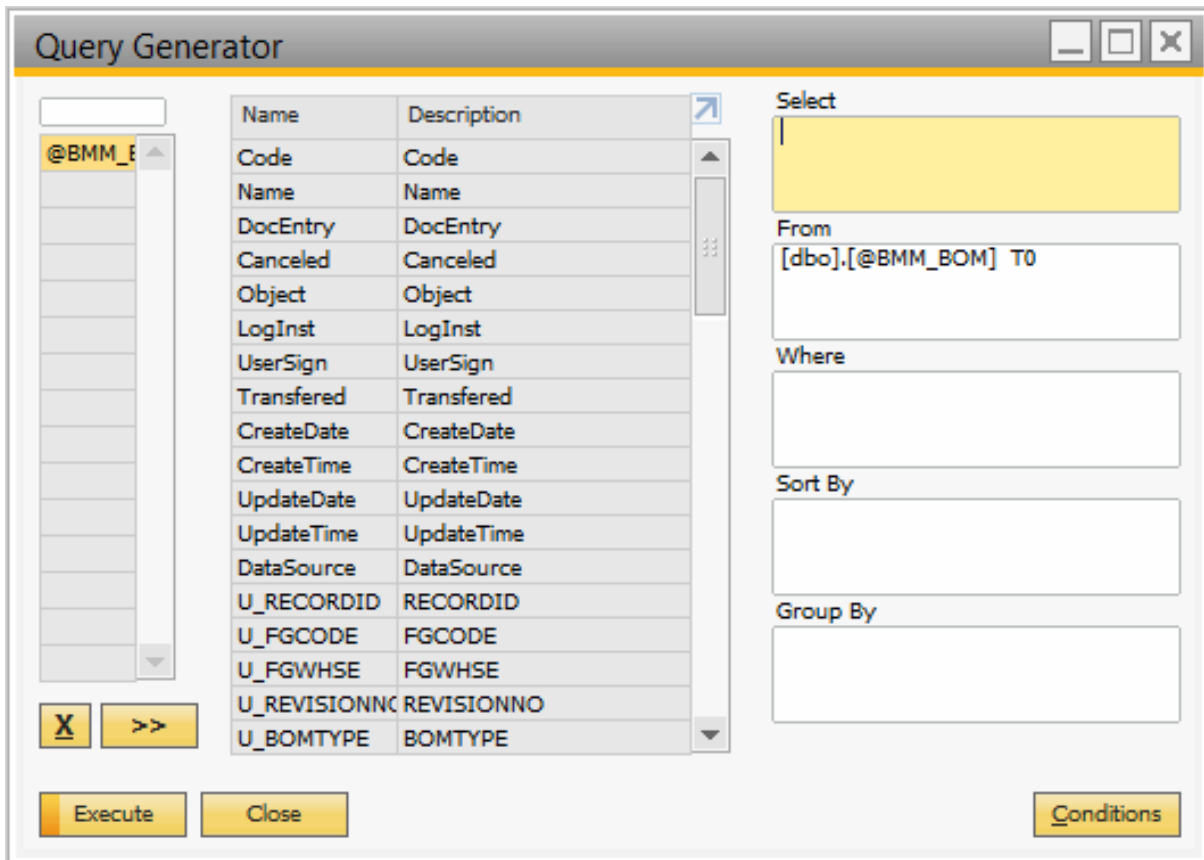
16.3 Script Master

To generate a BMR, you must draw information from various entities, such as formula, production, and QC. SQL queries can be useful in drawing the required information. You can use the *Script Master* to store the SQL commands that you may require for printing BMRs. You can use this screen to create and store queries, which can be used to print BMRs. To access this screen, choose:

Go To: Administration → Setup → Production → Script Master



For example, you may want to include BOM information of the sample in the BMR. In the *SQL Key* field, enter a unique code for the SQL command. If you want to create SQL queries, use the *SQL Expression* field. Alternatively, use the *Query Builder* to access the *Query Generator* and generate SQL queries using the GUI.



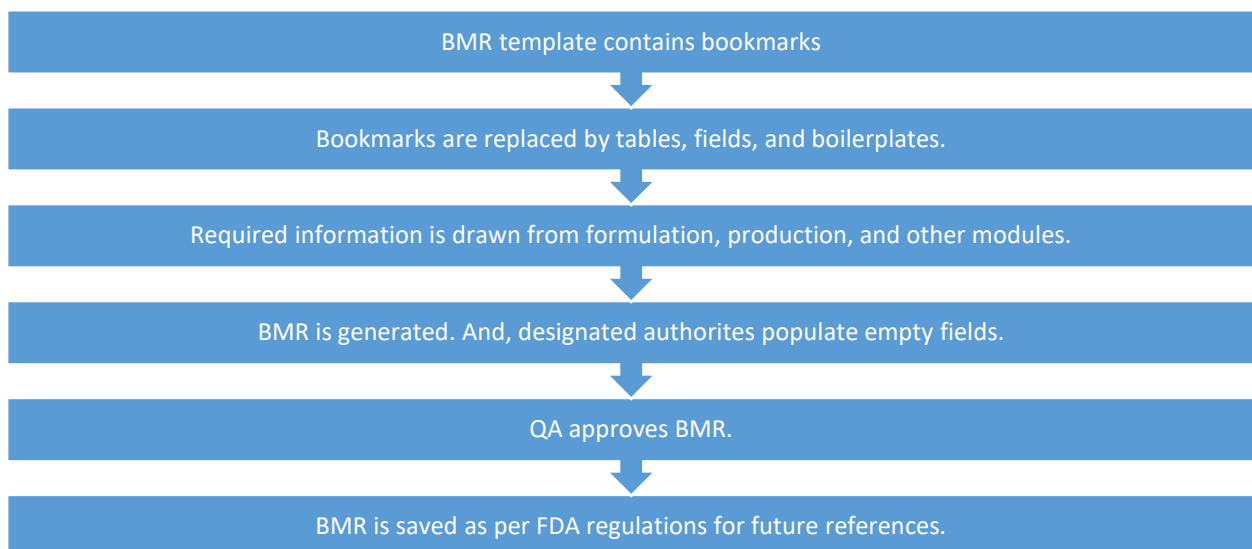
In the *Table Caption* column, enter whether a caption should be included for the table in the BMR. If the control is a table, you will enter *Yes* to print the caption with the table. For other controls, this field is not applicable. In the *Boilerplate/SQL Code/SQL* field, enter the details of the boilerplate or SQL code for displaying the control. Next, enter the bookmark that should be associated with the control. Now, enter the number of blank rows to be printed. Click the *Add* button to save the settings.

You can monitor the process activities and generate the BMR to meet the cGMP requirements. Numerous quality checks can be applied to ensure that the product complies with regulations. You can generate non-conformance records for those products that do not meet the regulations. Also, you can systematically record and attend to the customer complaint about the product, if any.

To comply with the cGMP requirements for BMR, BatchMaster ERP allows you to create and print a hybrid BMR, which is an electronically-generated record of batch production. This record also adheres to the FDA guidelines.

A hybrid BMR uses the word-automation utility (or the document template) that contains bookmarks, which are replaced by corresponding values of tables, single fields, boilerplates, or other information, as required, by the application. A default BMR template is provided for all product types.

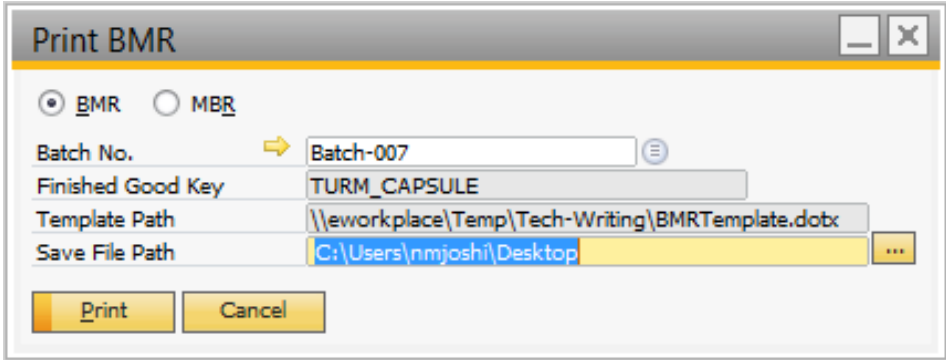
The information to help generate BMRs is drawn from modules, such as *Formulation*, *Production*, *Quality Control*, and capabilities, such as inspection plan, check list, and SOPs. After printing the report, the designated manufacturing authorities can provide appropriate information in the empty fields. BMRs must be approved by the quality assurance department and recorded as per FDA requirements.



16.5 Print BMR

Use the *Print BMR* screen to generate BMR for a batch. The BMR is hybrid. So, information will be partly printed and partly entered manually.

Go To: Process Manufacturing → Production Utilities → Print BMR



Choose to generate either a Batch Manufacturing Record (BMR) or a Master Batch Record (MBR). If you select BMR, then search and select the required batch number in the *Batch No.* field. Otherwise, enter the *Finished Good Key*.

The *Template Path* field is populated automatically from the *Print BMR Setup* screen. In the *Save File Path* field, either type or search and select the location to save the generated BMR. And, click the *Print* button to print the BMR.

17 Advance Batch Manufacturing Record

Using the BatchMaster Advance BMR feature you can map the attached BMR template with the following different objects

- SQL
- Boilerplate ID
- User Query
- Data Object

Also, an approval procedure can be implemented on the BMR.

17.1 Formula Defaults

You can enable the Advance BMR features from the *Formula Defaults* screen.

Go To: Main Menu → Administration → Setup → Formula → Formula Defaults

The screenshot shows a dialog box titled "Approval Template" with the following fields and options:

- Name: App_BMR
- Description: (empty)
- Active:
- Originator: (empty)
- Documents: (empty)
- Stages: (empty)
- Terms: (empty)

The "Formula Defaults" tab is selected, showing a list of checkboxes:

- Formula
- BOM
- Define Item QC Test
- Test Methods
- Test Master
- Inspection Plan
- Inspection Plan Check List
- Deviation Management
- Business Partner Catalog Number
- Advance Stability Plan
- Advance Boilerplate
- Advance BMR

Buttons: OK, Cancel

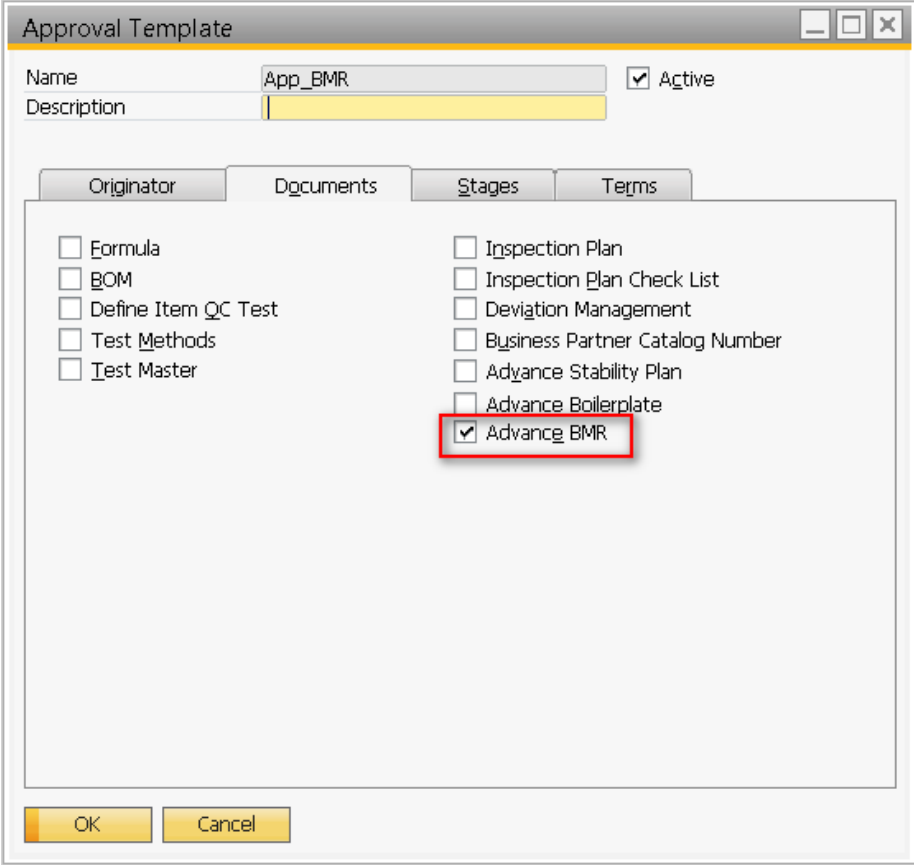
17.2 Approval Template

An Approval procedure can be also applied to the *Advance BMR*. For this,

Go To: Main Menu → Administration → Setup → Process Mfg Appr. Proce. → Approval Template

In the *Approval Template* screen, on the *Documents* tab, select the *Advance BMR* checkbox.

Associate an appropriate approval template with the *Advance BMR* and *Update* the settings.



The screenshot shows the 'Approval Template' configuration window. The 'Name' field is set to 'App_BMR' and the 'Active' checkbox is checked. The 'Description' field is empty. The 'Documents' tab is selected, and the 'Advance BMR' checkbox is checked and highlighted with a red box. Other checkboxes include Formula, BOM, Define Item QC Test, Test Methods, Test Master, Inspection Plan, Inspection Plan Check List, Deviation Management, Business Partner Catalog Number, Advance Stability Plan, and Advance Boilerplate. The 'OK' and 'Cancel' buttons are at the bottom.

17.3 Product Category

Use the *Product Category* Master screen to attach multiple documents to it.

Go To: Main Menu → Administration → Setup → Production → Product Category

#	File Name
1	C:\Users\amitaj\Desktop\Functional and technical document Print BMR Functional Docs (4).docx
2	C:\Users\amitaj\Desktop\report list.txt

The defined Product Category can be attached to a BOM on the Bill of Material Entry screen.

Seq No	Type	Item Code	Item Description	Warehouse	Quantity in Stock UOM	Quantity	Labor Hours DD:HH:MM	UOM	Overhead ID	Item Cost	Extended Cost
Mat					0.000	0.000	00:00:00			0.00	0.0000

Using the respective BOM, when you create a batch and print the BMR, the system will automatically open all the documents attached with the selected Product Category.

17.4 Print BMR Setup

With the Advance BMR option, the Print BMR Setup Screen displays as below.

#	Type	Sub Type	Table Caption	Boilerplate/SQL Code/SQL	Bookmark	No. Of Rows	Print From Row No.	Print Fr...
1	SQL	None	Yes					

Template ID: Enter a unique identification key for the BMR Template you are defining here.

Description: Enter a name or description for the BMR Template.

Type: The BMR/MBR can be of type *Template*, *Item Code* or *Product Type*. You can create a BMR/MBR for any specific Item or Product or can create it as a template to be used further for any required batch.

Category: You can select and specify that the template you are defining here is required to be used for BMR or MBR.

Sample Batch No/Sample Formula Id: If you selected the *Category* as BMR then the field caption will be displayed as Sample Batch No and it lets you search for or select the batch for which a BMR needs to be printed. If the *Category* is selected as MBR, the field caption will be displayed as Sample Formula ID and it lets you select the Formula for which to print the MBR.

Send for Approval: Click this button to send the record for approval.

Cancel Approval: Click this button to cancel the document approval.

Revise BMR: Use this button to generate the new revised BMR template.

Make Obsolete: Use this button to obsolete the record.

Revision: Displays the approved revision number of the template.

Status: Shows the current status of the Template.

Refresh BMR Sample Document: Use this button to refresh the document and display data with latest selections.

Full Mode/Compact Mode: Use this button to display the BMR/MBR Sample document in full/compact view.

Export to PDF: Use this button to generate a pdf file of the BMR Sample document to export.

Template Word File: Search and select the template file on which a bookmark is added.

Refresh Bookmark: Click on this button to clear the added template file path to add a new one.

Grid Details

BMR Type: Using the dropdown available here, select the boilerplate type as one of *SQL*, *Boilerplate*, *User Query*, *Data Object*.

Sub Type: The BMR sub type depends upon the BMR Type you select. The sub type can be *None*, *Single* or *Table*.

Table Caption: Select *Yes* if you want to print the caption of the column along with its value, otherwise select *No*.

Boilerplate/SQL Code/SQL: Displays the specified boilerplate/SQL criteria on the basis of which the bookmark will be printed.

Bookmark: Select the bookmark where the BMR value will be printed.

No of rows: For the *Table* type of BMR, here you can specify the number of records required to be printed.

Print From Row No: Specify the row number from where records will start printing.

Print From Column No: Specify the column number from where records will start printing.

17.4.1.1 Setting the Print BMR Setup

To begin with, enter a unique identification code for the *BMR/MBR template* you are creating and give it a *Description*. Next, specify that you are creating the BMR for a specific *Item* or *Product* or wish to create it as a *Template* to be used further for any required batch. If you select the *Item Code* option, then select the desired item; for the *Product Type* option, specify the Product Category and related details.

Select the *Category* from *BMR* or *MBR* to specify that the template you are creating will be used for BMR or MBR.

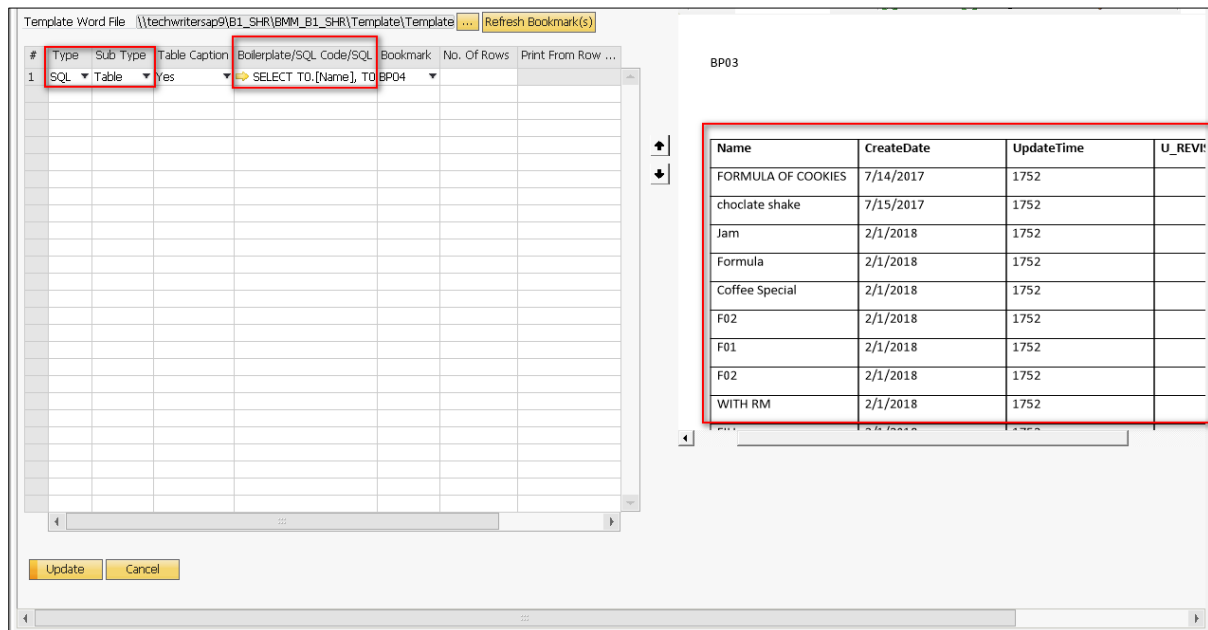
Select the template file with which you want to print the BMR, in the *Template Word File*. Click the *Refresh Bookmarks* button to display the template bookmarks in the dropdown.

Now, you need to map the BMR template bookmarks with appropriate elements.

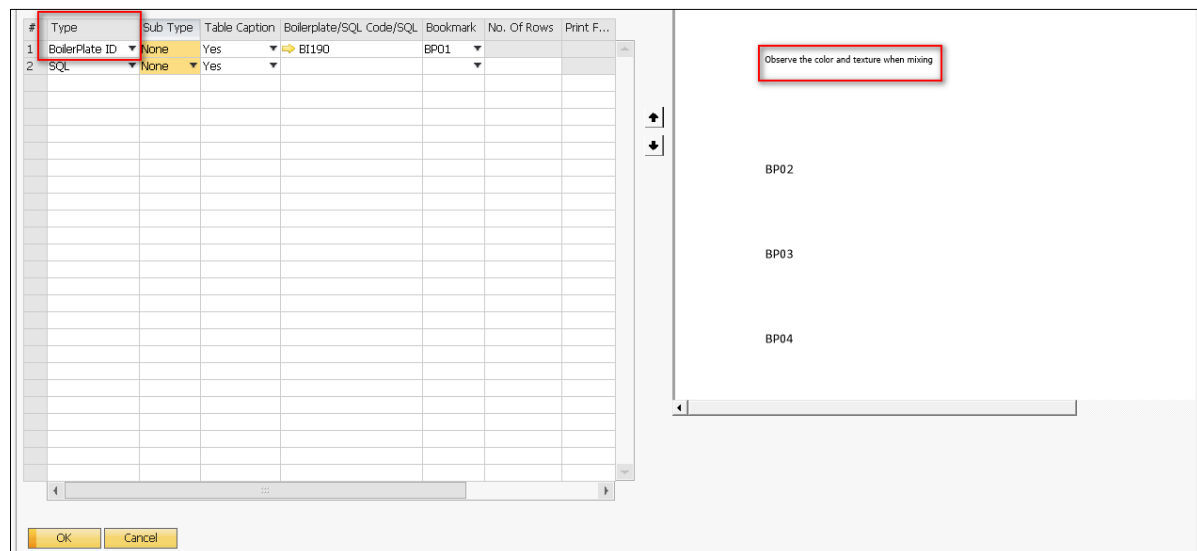
You can use the grid to define the mapping between bookmarks and controls, one mapping in each row of the grid. In the *Type* column, enter the type of control you want to map, such as a *Boilerplate*, *SQL key*, *User Query* or *Data object*. Specify the sub type as *None*, *Single* or *Table*.

In the *Table Caption* column, enter whether a caption should be included for the table in the BMR. If the control is a table, you will enter *Yes* to print the caption with the table. In the *Boilerplate/SQL Code/SQL* field, enter the details of the *Boilerplate*, *SQL code*, *Data object* or *User query* for displaying the control.

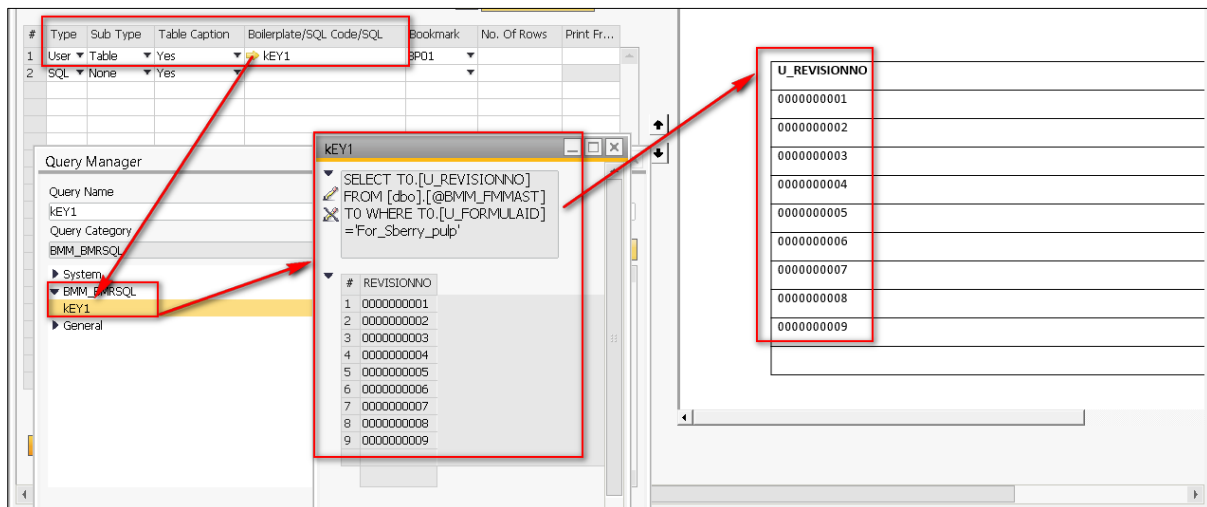
If the selected *Type* is *SQL*, you can directly write the *SQL query* in the *Boilerplate/SQL Code/SQL* field and accordingly fill the value in the selected bookmark. Alternatively, use the *Query Builder* to access the *Query Generator* and generate *SQL queries* using the *GUI*.



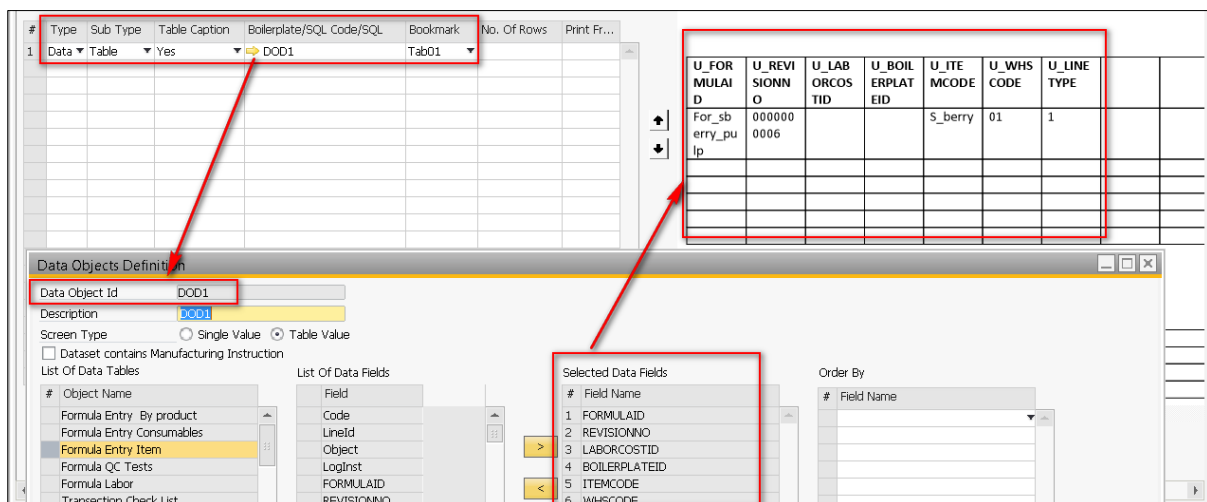
For the *Type* selected as *Boilerplate*, you can print the bookmark value as a boilerplate text. Selecting it, the *Boilerplate/SQL Code/SQL* field shows a list/lookup of all *Boilerplates* for you to select from.



For the *Type* selected as *User Query*, the *Boilerplate/SQL Code/SQL list/lookup* displays all user queries saved in BMM_BMRSQL of Query manager, to select from.



If you select the type as *Data Object*, then the list/lookup shows all data objects created in the system on the “Data Object Definition” screen.



Next, enter the bookmark that should be associated with the control. Now, enter the number of blank rows to be printed, number of rows and columns from where data starts printing. Click the *Add* button to save the settings.

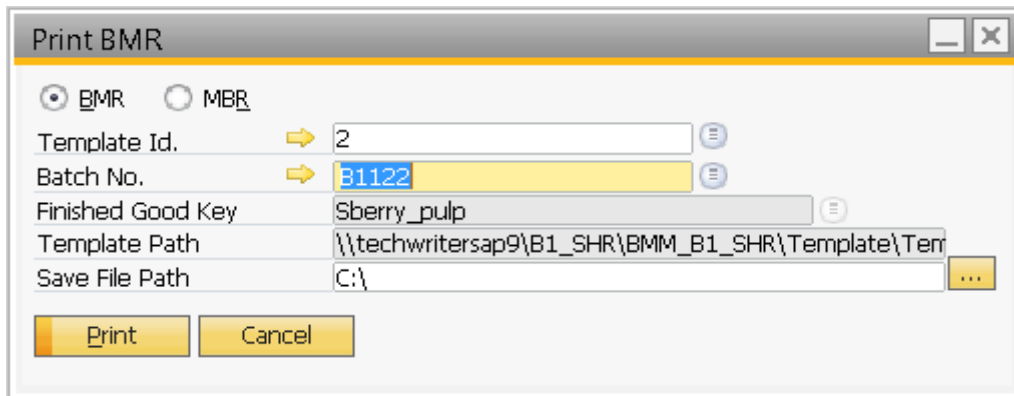
The *Send for Approval* button is activated, click on it to initiate the approval process. Follow the approval cycle. Once the document is approved by all authorized users, its status changes to Active. You can create a new revision of the BMR using the Revise BMR. The *Cancel Approval* button is available to cancel the approval request.

If you selected the *Category* as BMR then search and select the *Sample Batch No* to specify the batch for which the BMR needs to be printed. If the option selected was MBR then select the *Sample Formula ID*. Use the *Refresh BMR Sample Document* button to reload the preview on the basis of the selected criteria. You can modify the view of the BMR/MBR with the available options.

17.5 Print BMR

Use the *Print BMR* screen to generate a BMR for a batch. The BMR is hybrid, so information will be partly printed and partly entered manually.

Go To: Process Manufacturing → Production Utilities → Print BMR



<input checked="" type="radio"/> BMR <input type="radio"/> MBR	
Template Id.	2
Batch No.	B1122
Finished Good Key	Sberry_pulp
Template Path	\\techwritersap9\B1_SHR\BMM_B1_SHR\Template\Tem
Save File Path	C:\
<input type="button" value="Print"/> <input type="button" value="Cancel"/>	

Select the BMR option. Select the BMR template and then search and select the required batch number in the *Batch No.* field. Otherwise, enter the *Finished Good Key*.

The *Template Path* field is populated automatically from the *Print BMR Setup* screen. In the *Save File Path* field, either type or search and select the location to save the generated BMR, then click the *Print* button to print the BMR.

BATCH INFORMATION REPORT

QAERP_SP16_ALA

Batch Number	ser21	Owner	yash	Production Whs	01
Batch Type	Mix			Demand Type	Independent
Status	Issued			Demand Source	Production Order
Formula ID	yr_formula	yr_formula		Sales Order #	
Revision No.	0000000007	Customer Code		Total Runs	1
Current Run #	1	Customer Name		Process Cell	c3
Sch.Start Date	10/10/19	Act. Start Date	10/10/19	Theoretical Density	0.89
Sch.End Date	11/10/19	Act. End Date		Density Override	0.00
Order Weight	5.000000 KG	Batch Weight	9.263157 KG		
Order Volume	5.600001 LT	Batch Volume	10.374737 LT		
Setup Time	0:01:00	Variable Time	0:02:00	Fixed Time	0:08:00
Setup Labor	10.00	Variable Labor	40.00	Fixed Labor	80.00
Setup Overhead	1.00	Variable Overhead	4.00	Fixed Overhead	80.00
Previous Batch Ticket Date	10-October-2019				
Notes					

FG/BATCH OUTPUT DETAILS

SNO	ITEM CODE	DESCRIPTION	ORDERED QTY
1	yr_int	yr_int	5.00 KG

QC Test

						Batch #	ser21	
Formula :	yr_formula							
SNO	TEST ID	TEST DESC	NORMAL VALUE	LOWER VALUE	UPPER VALUE	RESULT		
1	FRESHNESS	FRESH	B1			Pass		
Remark								
2	HARDNESS	HARDNESS	9.00	8.00	10.00	Pass		
Remark								
3	Test1	Test1	Pass / Fail			Pass		
Remark								
Product :	yr_int							
SNO	TEST ID	TEST DESC	NORMAL VALUE	LOWER VALUE	UPPER VALUE	RESULT		
4	FRESHNESS	FRESH	B1			Pass		
Remark								

INSPECTION INFORMATION

DocNo/ Date	Item Code	Whs	Status	Submitted By	Verify By /Verified Date	Approved	Test	Value	Comment
Inspection Plan :- 12									
12			Approved	yash	yash	yash	STRENGTH	2	
10/10/201				10/10/2019	10/10/2019	10/10/2019			
12			Approved	yash	yash	yash	HARDNESS	10	
10/10/201				10/10/2019	10/10/2019	10/10/2019			
12			Approved	yash	yash	yash	COLOR	1	
10/10/201				10/10/2019	10/10/2019	10/10/2019			

NC INFORMATION

Source :- Deviation

NON Conformance :-

DocNo	24	NC Date	10/10/2019	ItemCode	yr_int	Desc	yr_int	
Qc Test Code	COLOUR	Min Value	0.00	MaxValue	0.00	Act .Value	0	Status 3
Customer		Lot no	yr_int 10-10	Machine		Reported By	yash	Owner manager
NC Desc	A non-conformance (or 'nonconformity') means that something went wrong. The non-conformance could be in a service, a product, a process, goods from a supplier, or in the management system itself. It occurs when something does not meet the specifications or requirements in some way.							

Root Causes Analysis :-

Root Cause	Analysed By	yash	Analysed .Date	10/10/2019	CAPA NO.	CAPAOct2019
Root Cause Detail	North Carolina (/ kærəˈlæinə/ (About this soundlisten)) is a state located in the southeastern region of the United States. North Carolina is the 28th largest and 9th-most populous of the 50 United States. It is bordered by Virginia to the north, the Atlantic Ocean to the east, Georgia and South Carolina to the south, and Tennessee to the west. Raleigh is the state's capital and Charlotte is its largest city. The Charlotte metropolitan area, with an estimated population of 2,569,213 in 2018, is the most populous metropolitan area in North Carolina, the 23rd-most populous in the United States, and the largest banking center in the					

User yash

Source :- Inspection

NON Conformance :-

DocNo	25	NC Date	10/10/2019	ItemCode		Desc	
Qc Test Code	COLOR	Min Value	0.00	MaxValue	0.00	Act .Value	1
Customer		Lot no		Machine		Reported By	yash
NC Desc	sdfasdfasdfasdfasdfasdfasdfasdf						

Root Causes Analysis :-

Root Cause	Analysed By	yash	Analysed .Date	10/10/2019	CAPA NO.	
Root Cause Detail	Details					

Action Taken :-

Action taken

CAPA INFORMATION

DocNum 9 Status 5 Priority 1 Owner yash

Source :- Deviation

Origin :-

Category	CAPA CATEGC	Assigned To	yash	Dept.	-2	Branch	-2
Assigned To	CAPA TYPE	Sch. Comp DT	10/10/2019				

CAPA Desc Corrective and preventive action (CAPA, also called corrective action/preventive action or simply corrective action) consists of improvements to an organization's processes taken to eliminate causes of non-conformities or other undesirable situations. It is usually a set of actions that laws or regulations require an organization to take in manufacturing, documentation, procedures, or systems to rectify and eliminate recurring nonperformance. Non-conformance is identified after systematic evaluation and analysis of the root cause of the non-conformance. Non-conformance may be a market complaint or customer complaint or a failure of a machinery or a quality management system, or misinterpretation of written instructions to carry out a work. The corrective and preventive action is designed by a team that includes quality assurance personnel and personnel involved in the actual observation point of nonconformance. It must be systematically implemented

Category	CAPA CATEGC	Assigned To	yash	Dept.	-2	Branch	-2
Assigned To	CAPA TYPE	Sch. Comp DT	10/10/2019				

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Corrective action: Action taken to eliminate causes of non-conformities or other undesirable situations. Preventive action: Action taken to prevent further reoccurrence of such non-conformities.

Investigation :-

Category	CAPA REASON	Inv. By	yash	Inv. DT.	10/10/2019	Act. Taken	Y
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Invst. Detail CAPA Details
 Detail (record producer), AKA Noel Fisher
 Auto detailing, process of thoroughly cleaning a car
 Level of detail, 3D computer graphics concept
 Security detail, military or private team assigned to protect an individual or group
 Detail man, industry-deprecated term for a pharmaceutical sales representative

Corrective Action :-

Investigation :-

Category	CAPA REASON	Inv. By	yash	Inv. DT.	10/10/2019	Act. Taken	Y
Invst. Detail	CAPA Details Detail (record producer), AKA Noel Fisher Auto detailing, process of thoroughly cleaning a car Level of detail, 3D computer graphics concept Security detail, military or private team assigned to protect an individual or group Detail man, industry-deprecated term for a pharmaceutical sales representative						

Corrective Action :

Action Taken	Corrective Action taken						
User	yash	Corr.Date	10/10/2019	Act. Taken	Y		

Preventive Action :-

Action Taken	Preventive action Taken						
Verify By	yash	Ver.Date	10/10/2019	Act. Taken	Y		

Verification :-

Comment	CAPA Verification required						
Verify By	yash	App. By	manager	Act. Taken	Y		

CHECK LIST INFORMATION							
Doc No	17	Checked By	yash	Date	10/10/2019	Verify By	yash
Approved By	yash	Date	10/10/2019				

Boiler Plate	Checked	Verify	Approved	Desc.	Checked By	Checked Date
a1	Y	Y	Y		yash	10/10/2019
BP06	Y	Y	Y		yash	10/10/2019
BP07	Y	Y	Y		yash	10/10/2019

10/17/2019 1:31:49PM

DOWN TIME INFORMATION								
DocNum	DT Code	Remarks	Start Date	End Date	Start Time	End Time	Process Cell	Desc
5	DT Dode	Remark1	10/10/2019	10/10/2019	960	1,080	c3	DT Code

DEVIATION INFORMATION

DocNum	Date	Status	Comp Dt.	Type	Req.By	Assign To	NC NO	CAPA NO	Reason	Dev Dtl.
5	10/10/2019		10/10/2012		yash	manager	NC0ct20	CAPA0ct21	Reason is the c	Relative standard deviation, in probability theory and statistics is the absolute value of the coefficient of variation
Impact :		"Imapct Wrestling results 6/25". "WWE SmackDown Live #955 « Events Database « CAGEMATCH				Root Cause : Griffin Investigations, the most prominent group of private investigators specializing in the gambling industry				
DPosition		A disposition is a quality of character, a habit, a preparation, a state of readiness, or a tendency to act in a specified way that may be learned				Notes : Musical note, a pitched sound (or a symbol for a sound) in music				

19 GLOSSARY

Glossary Term	Definition
BOM	(Bill of Materials) A list of the raw materials, intermediate assemblies, consumables and packaging materials needed to produce quantity “1” of a finished good or intermediate item.
Finished Good	An inventoried item that results at the end of a manufacturing process and is ready to be sold.
Formula	A list of ingredients, their proportions, and instructions for making an intermediate or finished product.
Process Cell	A group of one or more machines with a common purpose. Used in planning and scheduling as well as to define and monitor capacity.
Raw Material	An inventoried item, purchased from a supplier, which has not been modified by your process.
SRM	Sales Request Management (SRM) is a process of capturing and tracking sales requests from customers.
Third Party Manufacturing	Third party manufacturing is a process of getting the complete or a part of manufacturing work done by a contract manufacturer.
Stability Testing	A measure of how a product maintains its quality attributes over time.