

Food & Beverage Systems Readiness Checklist

Thirty questions for a Fishbowl-centered operation spanning ingredients, production, lot genealogy, FEFO, retailer EDI and fulfillment.

Ingredients and receiving

- ☐ Capture supplier, item, lot, quantity, date and receipt reference at receiving.
- ☐ Separate physical receipt from approved or releasable status.
- ☐ Validate ingredient and packaging units against the approved BOM.
- ☐ Keep supplier document and specification references durable and searchable.

Production and traceability

- ☐ Record actual component lots and quantities consumed on each work order.
- ☐ Create a unique finished lot with yield, date and location.
- ☐ Retain the approved formula or BOM version reference.
- ☐ Test one backward trace and one forward trace using controlled data.

Allocation and channels

- ☐ Define FEFO and minimum shelf-life rules by customer or channel.
- ☐ Validate each, inner, case and retailer item mappings.
- ☐ Monitor 850, 855, 856, 810 and 846 transaction status.
- ☐ Reconcile Fishbowl, channel and 3PL quantities at a known timestamp.

Architecture and ownership

- ☐ Name the system of record for product, inventory, order, fulfillment, quality and finance data.
- ☐ Label every connection as documented, partner-supported or designed after discovery.
- ☐ Document field-level ownership for identifiers, status, quantity, dates and prices.
- ☐ Assign a business owner and technical owner to every interface.

Validation and support

- ☐ Define valid, warning and rejected transaction states.
- ☐ Make failed handoffs visible before a customer or partner reports them.
- ☐ Test with controlled non-production data and reconcile expected results.
- ☐ Document cutover, monitoring, issue response, change control and rollback.

IMPORTANT BOUNDARY

Use this worksheet during discovery. It is not legal, regulatory or quality advice.