

Supplement Systems Readiness Checklist

A focused review of status, lots, formulas, COA dependencies, contract manufacturing, returns and channel allocation.

Status and authority

- ☐ Define quarantined, approved, rejected, held, in-process and released.
- ☐ Document who may change each status and what transactions it permits.
- ☐ Keep physical on-hand distinct from releasable available inventory.
- ☐ Route returned product into quarantine until authorized disposition.

Formula, batch and evidence

- ☐ Publish only approved formula values into operational BOMs.
- ☐ Detect formula-to-BOM version, quantity and unit differences.
- ☐ Track COA and prerequisite status without treating document presence as approval.
- ☐ Preserve component-to-finished-lot genealogy and expiration.

Demand and outside production

- ☐ Expose contract-manufacturer dates, finished lots and receipt risk.
- ☐ Allocate subscriptions only from releasable inventory.
- ☐ Keep retail and wholesale commitments visible beside DTC demand.
- ☐ Reconcile outside warehouse inventory by item, lot, status and time.

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.