Start with the project.

Complete the fields you know. Record open decisions for the supplier discussion; this checklist does not establish an order or a final formula.

Company / brand

Contact name and business email

Target market and intended audience

Product name, source ID or proposed concept

Preferred format: gummies, capsules, powders, drops, tablets or softgels

Expected order size and unit of measure

Starting point: listed product / label or pack change / new formulation brief

Keep the proposed product, supplier identity and specification version together. Current availability, minimum order, samples and scheduling belong in the written supplier proposal.

Define the configuration.

Use the complete supplier specification for the proposed version. Do not calculate nutrient amounts from bottle count, net weight or marketing artwork.

Ingredients, ingredient forms and intended amounts per serving

Serving basis, format and restrictions to evaluate

Container, fill or count, closure and label requirements

Sample version, evaluation questions and acceptance responsibilities

Artwork ownership, confidentiality or formula-use rights to agree

Identify which changes are presentation changes and which require formulation or technical feasibility review. The agreed specification and artwork define the final configuration.

Request the right records.

Select records to discuss, then agree availability and disclosure with the responsible supplier. A checked box is a request, not proof that a record exists or is approved.

Documents to discuss

- [ ] Complete product / ingredient specification and version
- [ ] Material or finished-product test report / batch COA, where relevant
- [ ] Shelf-life or stability support for the proposed configuration
- [ ] Facility or company documents: actual holder, issuer, scope and validity
- [ ] Packaging specification, label dimensions and approved artwork version
- [ ] Sample version, conditions and evaluation record

For each report: product or lot, methods, units, limits and date

Who reviews formula, label, documents and order release?

Open questions and next action

US reference sources: FDA Dietary Supplements; 21 CFR Part 111. Read the original requirements for the activities and parties in your project. This is a procurement worksheet, not regulatory or clinical approval.