A. Materials

1) Overview of Materials

1. **SAY: Materials are the ingredients and fillers in your products, packaging labels, and the finished Goods themselves. We will need to add three materials for the training Product. These are Training Powder, Training Capsules and Training Product. Click the Add New Record button, but don't enter anything yet.**

2. **You will choose one of the two Material Type classifications in the drop down. One is for materials used in manufacturing such as raw materials, in-coming work in process and other materials. The other classification is for materials that will be manufactured such as Finished Goods and outgoing Work in Process.**

3. **Now you can select the Raw Material classification and click Continue.**

4. **I am going to point out each of the elements on this screen as I talk about them. After that, you will enter some materials.**

- **Type is a required field. You will select the type from the drop down list.**

- **Part # is now 0. This will be assigned the next sequential # by the program when you press Confirm.**

- **Material Name: The Name of material as you want it to appear in the rest of the program. This is a required field. It is limited to 30 characters if you use QuickBooks with InstantGMP. Otherwise it is limited to 60 characters.**

- **Unit: This is the unit of measure that you will use when you dispense this material during manufacturing. Units are automatically converted within the same unit of measure family. A volume to volume example is liters to milliliters. A weight to weight example is grams to kilograms.**

- **Material Id: This is a number or name of the material that you use in your current or legacy system; it could be a code, nickname or catalog # by which you would like to reference the material. This is an optional field.**

- **Material Description: This where you can enter a physical description of the material. This is optional.**

- **Cost/Unit   : This will be the default cost in a purchase requisition. This cost/unit can be updated at the time a material is requisitioned.**

- **Account: this is used for data transfer to QuickBooks and defaults to "InstantGMP". This is optional.**

- **Storage Condition: You will select one from a drop down list. Ambient is a default. This is a required field.**

- **Recommended Shelf Life:** This is optional; you enter how long your product is good for

- **QM Retest Period** (months): This is optional; you enter how often you want to retest

- **Vendor Order Number:** This is optional. You can enter a catalogue # if you know it

- **Preferred Vendor:** This is optional. You can enter the vendor most often ordered from if you know who it is

2) Raw Materials

5. SAY: You will now enter two raw materials. Click the Material menu item and then click the Add New Record button, but don't enter anything yet.

6. Remember that there are two Material Type classifications in the drop down. One is for materials used in manufacturing. We just finished entering that class of materials. The other classification is for materials that will be manufactured. These include Finished Goods and outgoing Work in Process. Work in Process describes a material that is to be processed from raw materials, but is not yet a completed product.

7. The first is "Training Liquid". Start by choosing the Raw Material classification. Select the Type as "Ingredient-RM". The Material Name is "Training Liquid", the Unit is "mL" for milliliters, the description is "Clear, colorless liquid", the Storage Condition is "Ambient" and the Preferred Vendor is "Training Supplier". Press confirm to bring you back to the main Material screen.

8. Press the Add New Record to start entering the next material. This is going to be a Primary Container. This is the container that comes in direct contact with the product you manufacture. In many industries, it is used as part of a product's naming convention.

9. Select the Classification labeled "Raw Materials/In-Coming WIP/Other" and then press Continue. Start by selecting the Type as "Primary Container-RM". The Material Name is "1 oz. Amber Bottle", the Unit is "ea." for each, the description is "1 oz. Amber glass bottle with cap", the Storage Condition is "Ambient" and the Preferred Vendor is "Training Supplier". Press confirm to bring you back to the main Material screen.

3) oWIP/Finished Goods

10. Now that there are materials in the system that be used in manufacturing, you will need to enter a material that will be manufactured. This is going to be a bulk outgoing Work in Process. An outgoing Work in Process is a material that is manufactured within the system, but is not yet ready for sale to consumers. It can be used as a material in another operation, such as packaging and labeling, or it can be something that is sold to other customers who will complete the manufacturing operation.

11. Press the Add New Record to start entering the next material. Click the Add New Record and then the "Select Classification" drop down. Select the Classification labeled "Finished Good/Out-Going WIP" and then press Continue.

12. This screen is similar to the raw material entry screen, but it is specific for Finished Goods and outgoing Work in Process. I am going to point out each of the elements on this screen as we talk about them. After that, you'll enter an outgoing WIP.

- **Type**: This is where you select the material type of the product you are going to manufacture.

- **FG/oWIP Part** # is now 0. This will be assigned the next sequential # by the program when you press Confirm.

- **Material Name**: Name of material as you want it to appear on a part of a product name.

- **Batch Unit**: This is the unit you will use when you have finished manufacturing your batch. It is the unit that you will use to describe the product that you will store or sell.

- **Material Id**: This is a number or name of the material that you use in your current or legacy system; a code, nickname or catalog # by which you would like to reference the material.

- **Material Description**: you will enter a physical description of the material.

- **Cost/Unit**: This is the cost per unit.

- **Account**: this is used for data transfer to QuickBooks and defaults to "InstantGMP".

- **Storage Condition**: You will select one from a drop down list.

- **Recommended Shelf Life**: This is optional; you enter how long your product is good for.

- **QM Retest Period (months)**: This is optional; you enter how often you want to retest.

13. Start by selecting the Type as "Bulk-oWIP". The Material Name is "Training oWIP", the Unit is "ea." for each, the description is "Training Liquid in bottles for further processing" and the Storage Condition is "Ambient". Press confirm to return to the main menu.