

## Procession Neon Pre-Release Notes

### 1. Formula Estimating and Quoting

Target Industries: Contract Manufacturing, Custom Manufacturing

- a. Production Batch Sizes which are used for creating/updating the BOM and for estimating and quoting. This batch size is defined on the formula and it can differ from the formula size.
- b. Assign Routing to a formula in order to calculate Labor, Machine and Overhead costs for the formula during the estimating process. Allows more accurate estimates during the R&D phase of the product life-cycle.
- c. Assign and capture additional costs, such as Art, Lab, Registration, QC, Marketing, Packaging and Shipping, etc. to the formula.
- d. Calculate tiered pricing on the formula.
- e. Generate an Estimate or Quote from the Formula. Print quotes and estimates as either Price Lists (i.e. Price Tiers with quantity ranges) or as line items (Qty \* Price).
- f. Track the distribution of Estimates or Quotes by customer on the formula.

### 2. Product Certificates

Target Industries: Food & Beverage, Nutraceutical, Pharmaceutical, Chemical

- a. Track certificates at the formula level or product level (ex. Gluten-Free, Halal, Kosher, Green Seal, Made in The USA, 3<sup>rd</sup> Party Certified, etc.) and specify the validity dates for the certificate. Specify how often these certificates will be distributed to customers as well as the date that the certificate was last distributed.
- b. Specify which certificates are required to be distributed to the clients and whether the formula currently meets the requirements in order to be certified.
- c. Automatically distribute certificates to clients based upon user-specified frequency.
- d. Log when certificates have been distributed to each customer.
- e. Ability to send certificates that are either: a) based upon a Certificate Letter templates or b) PDF attachments.

### 3. Formula Regulatory Control by Country

Target Industries: Food & Beverage, Nutraceutical, Pharmaceutical

- a. Rules are used to specify if any regulations would prevent the sale of the formula within the specified target countries. These rules validate against each country's regulations assigned to each component of the formula.

## Procession Neon Pre-Release Notes

### 4. Formula Allergen Roll-up

Target Industries: Food & Beverage, Nutraceutical, Pharmaceutical

- a. Roll-up allergens on a formula during R&D.
- b. Perform advanced roll-ups, such as the Gluten-Free requirement of less than 20 ppm. Procession can calculate this estimated value based upon the estimated gluten level of each component.
- c. Publish Allergen Roll-up to the standard X3 Allergen field on the Product
- d. Allergen Certificates (see Formula Certificates)

### 5. SDS

Target Industries: Chemical, Pharmaceutical

- a. Text Phrases are now Rules-Based – For example, phrases for First Aid measures can now be defined based upon the hazard classifications of the formula. If a formula is generally safe, then the advice may be to “move to fresh air”. If the formula is poisonous, then a rule can advise to “immediately contact poison control”.
- b. SDS distribution schedules can be defined and SDS can be automatically distributed based upon these schedules.
- c. Now supports up to 9 locale/country templates.
- d. SDS with a status of Obsolete or Not Approved can no longer be printed.
- e. Calculations have been added to determine the theoretical Boiling Point, LEL and UEL and Inhalation Acute Toxicity.
- f. “Worst Actor” method is now used for the theoretical Flash Point and Auto Ignition Point.

### 6. Quality Control Enhancements

Target Industries: All

- a. Periodic Testing now provides the ability to define a frequency for which a particular test must be performed.
- b. Support for up to 5 levels of QC testing in both Quality Control Results and in the Quick Entry feature.
- c. A Synchronization utility has been added to allow changes to a question to be published out to all Product Technical Sheets.

### 7. Presales Requests Enhancements

Target Industries: All Process Manufacturing, especially Food & Beverage, Nutraceutical, Pharmaceutical

Overview: The Presales Requests feature has been enhanced and is now the primary home for the “Formula Project”. This feature still integrates with CRM and PJM projects.

## **Procession Neon Pre-Release Notes**

Enhancements include:

- a. Certification Requirements for the project (ex. Gluten-Free, Halal, Kosher, etc.).
- b. Generate Sample Orders for one or more formulas. Track feedback by formula and customer.
- c. User-Defined Presale Questions and Templates.
- d. User-Defined Task Templates for Lab and Sales Tasks
- e. Lab Requirements (ex. Send Microbial Results to Customer, Send CoA, SDS required, etc.)

### **8. Master Product Link**

Target Industries: Chemical Distribution

- a. Define a master product link for a product. The master product is the source for regulatory documents such as SDS.

### **9. Miscellaneous**

- a. When publishing a formula to create a new product or BOM, the default status is now "In Development".