
Sample Production And Approval Workflow

1.0 Policy Objective & Scope

The objective of this policy is to establish a standardized workflow for the creation, review, approval, and tracking of sample production requests within the cabinet and millwork manufacturing facility. This ensures that all samples are produced to specification, approved by the appropriate stakeholders, and documented for future reference.

This policy applies to all departments involved in sample production, including Engineering, Production, Quality Assurance, Sales, and Project Management. It covers all sample requests from initial submission through final approval and archival.

2.0 Roles & Responsibilities

- **Engineering Manager:** Reviews sample design for feasibility and compliance with engineering standards. Approves or rejects the sample request based on technical criteria.
- **Production Supervisor:** Assigns sample production to appropriate team members and ensures timely completion according to the approved schedule.
- **Quality Assurance Lead:** Inspects the finished sample against the approved specifications and documents any deviations.
- **Sales Representative:** Initiates the sample request on behalf of the client and provides all necessary specifications and deadlines.
- **Project Manager:** Coordinates the workflow, tracks progress, and ensures all approvals are obtained before production begins.
- **Sample Technician:** Fabricates the sample according to the approved design and quality standards.

3.0 Core Rules & Guidelines

- All sample requests must be submitted using the official Sample Request Form (SRF) available in ShopDocs.
- **The SRF must include:** client name, project reference, material specifications, finish details, dimensions, quantity, and required delivery date.
- No sample production may begin without a fully approved SRF signed by the Engineering Manager and Project Manager.
- Verbal approvals are strictly prohibited. All approvals must be documented in ShopDocs.
- Sample requests are prioritized based on the client delivery deadline and production capacity. The Project Manager assigns a priority level (High, Medium, Low) upon submission.
- Any changes to an approved sample request must be submitted as a new request with a reference to the original SRF number.
- Samples that fail quality inspection must be documented with a Non-Conformance Report (NCR) and reworked or re-fabricated before final approval.

4.0 Step-by-Step Workflow

1. Sales Representative completes the Sample Request Form (SRF) in ShopDocs, including all required specifications and the client deadline.
2. Project Manager reviews the SRF for completeness and assigns a priority level based on the deadline and current production load.
3. Engineering Manager reviews the sample design for technical feasibility, material availability, and compliance with engineering standards. Approves or rejects the request with comments.
4. If rejected, the SRF is returned to the Sales Representative with feedback for revision. The workflow loops back to step 1.
5. Upon engineering approval, the Project Manager schedules the sample production in the production calendar and notifies the Production Supervisor.
6. Production Supervisor assigns the sample to a Sample Technician and provides the approved SRF and any relevant drawings or specifications.
7. Sample Technician fabricates the sample according to the approved specifications and documents any deviations or issues encountered during production.
8. Quality Assurance Lead inspects the finished sample against the SRF and engineering drawings. Passes or fails the sample with a detailed inspection report.
9. If the sample fails inspection, a Non-Conformance Report (NCR) is generated. The sample is either reworked or re-fabricated, and the workflow returns to step 7.
10. Upon passing inspection, the sample is tagged with a unique sample ID and placed in the designated sample holding area.
11. Project Manager notifies the Sales Representative that the sample is ready for client review. The Sales Representative coordinates client approval.
12. Once client approval is received (documented in ShopDocs), the Project Manager closes the SRF and archives all related documents in the project folder.

5.0 Documentation & Compliance

- All sample requests, approvals, inspection reports, and NCRs must be stored in the master project folder within ShopDocs.
- Each sample must have a unique sample ID that links back to the original SRF and project number.
- A monthly audit of all closed SRFs will be conducted by the Quality Assurance Manager to ensure compliance with this workflow.
- Any deviations from the approved workflow must be documented with a formal deviation request and approved by the Engineering Manager.
- Records must be retained for a minimum of 5 years after project completion for warranty and reference purposes.

Regulatory Disclaimer: This document is a generic policy and workflow template. The end-user assumes all liability for validating all procedures, roles, and administrative guidelines against actual organizational structures before formal implementation.