




**APPROVAL**

Role	Name	Function	Date & Signature
Author	Armand Polmard	ITS	
Reviewer	Eva Kilimtzidi	QA&SA	 <small>Signed with Odoo Sign 5c82ba4897...</small>
Approver	Mauro Rinaldi	RAQM	 <small>Signed with Odoo Sign 5c82ba4897...</small>

**PURPOSE**

This procedure describes how ASPIVIX invoices or credits sales orders in its ERP system. It contains instructions on how to retrieve sales orders eligible for invoicing, invoice unique or multiple orders, credit an order if necessary, and send accounting documents to customers.

**SCOPE**

The scope of this procedure includes processing invoices and credit notes for ASPIVIX's customers, managed through ASPIVIX's ERP system. Out of scope is how to manage invoices or credit notes from suppliers.

**RESPONSIBILITIES**

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager. Any person processing customers' invoices or credit notes in ASPIVIX's ERP system must respect and apply this guide.

**DOCUMENT HISTORY**

Description of Changes	Version
Initial version	A
CRC-2509-13 – Screenshots and process updated across the document due to Odoo migration to version 18, implementing new application layouts.	B

**TABLE OF CONTENTS**

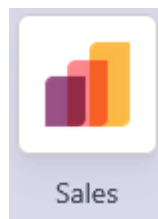
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<b>1. INSTRUCTION DESCRIPTION</b>	<b>3</b>
1.1. IDENTIFYING SALES ORDERS TO INVOICE	3
1.2. INVOICING A SINGLE SALES ORDER	3
1.3. INVOICING MULTIPLE SALES ORDERS	5
1.4. CREDITING AN INVOICE	6
<b>2. REFERENCES</b>	<b>8</b>
2.1. PROCEDURES, INSTRUCTIONS AND GUIDELINES	8
2.2. TEMPLATES AND FORMS	8

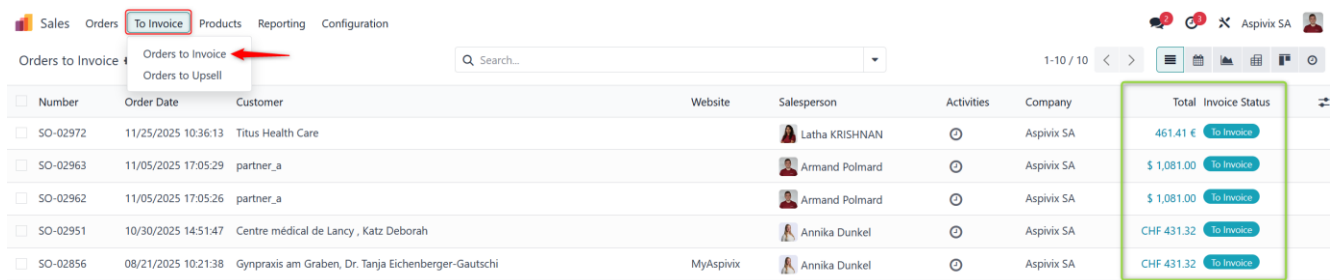
## 1. INSTRUCTION DESCRIPTION

### 1.1. Identifying sales orders to invoice

Once a quotation is validated into a sale order, it becomes eligible for invoicing. **Shipped Sales Orders (SO) must be invoiced immediately after shipping and sent to customers promptly.** To visualize such SOs, open the Sales application by clicking on the respective APP from Odoo's main dashboard.



To view SOs requiring invoicing, access the menu To invoice > Orders to Invoice.

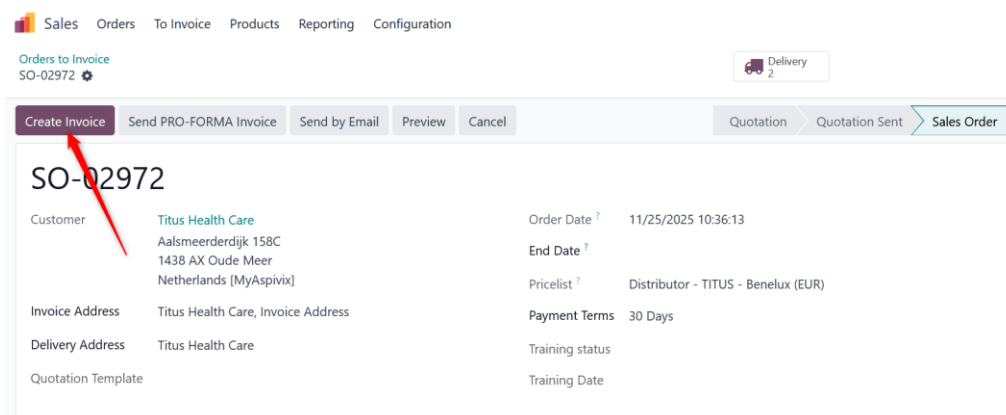


Number	Order Date	Customer	Website	Salesperson	Activities	Company	Total	Invoice Status
SO-02972	11/25/2025 10:36:13	Titus Health Care		Latha KRISHNAN		Aspivix SA	461.41 €	To Invoice
SO-02963	11/05/2025 17:05:29	partner_a		Armand Polmard		Aspivix SA	\$ 1,081.00	To Invoice
SO-02962	11/05/2025 17:05:26	partner_a		Armand Polmard		Aspivix SA	\$ 1,081.00	To Invoice
SO-02951	10/30/2025 14:51:47	Centre médical de Lancy , Katz Deborah		Annika Dunkel		Aspivix SA	CHF 431.32	To Invoice
SO-02856	08/21/2025 10:21:38	Gynpraxis am Graben, Dr. Tanja Eichenberger-Gautschi	MyAspivix	Annika Dunkel		Aspivix SA	CHF 431.32	To Invoice

Sales orders eligible for invoicing show “Sales Order” in Status column, and “To Invoice” in the Invoice Status column.

### 1.2. Invoicing a single Sales Order

To invoice a single SO, click in the corresponding line to open the transaction. On the SO screen, click on Create Invoice.



SO-02972

Customer: Titus Health Care  
Aalsmeerderdijk 158C  
1438 AX Oude Meer  
Netherlands [MyAspivix]

Invoice Address: Titus Health Care, Invoice Address

Delivery Address: Titus Health Care

Quotation Template

Order Date: 11/25/2025 10:36:13

End Date:

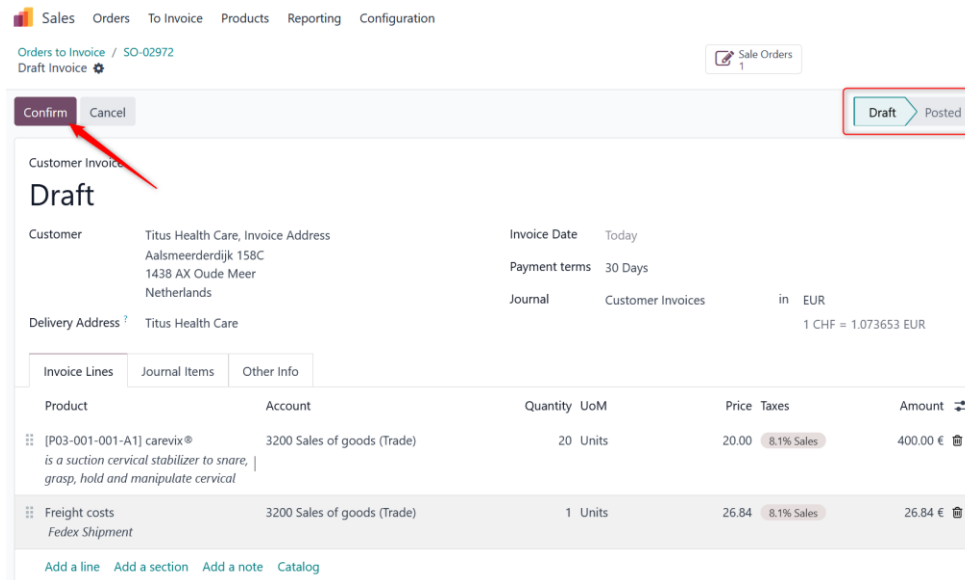
Pricelist: Distributor - TITUS - Benelux (EUR)

Payment Terms: 30 Days

Training status

Training Date

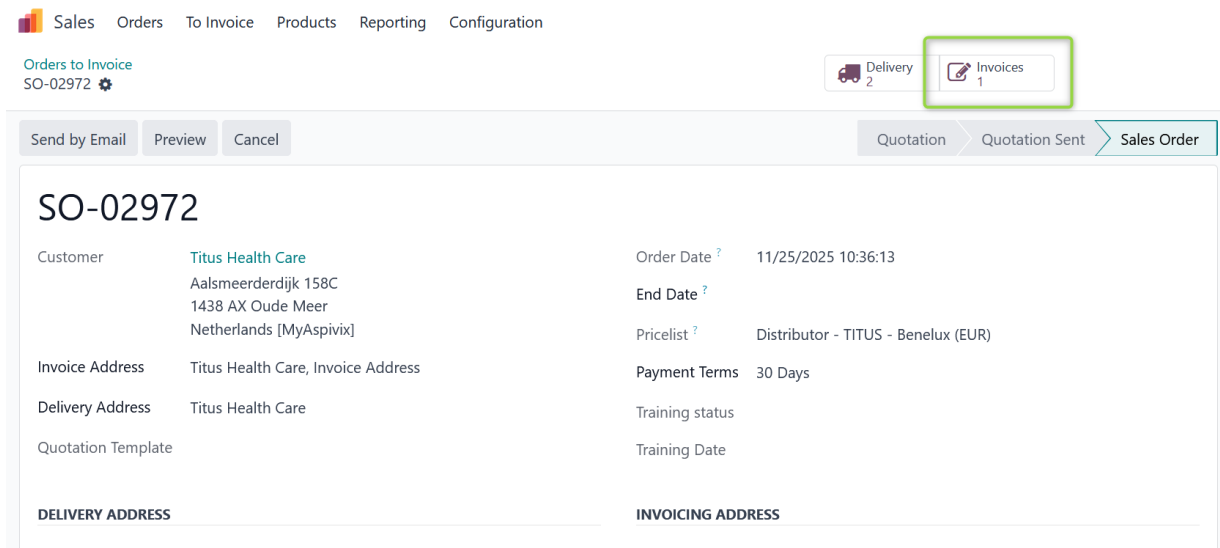
On the opening window, make sure that Regular Invoice is selected in the section Create Invoice, and click on “CREATE AND VIEW INVOICE”. This action will create a **draft invoice**, for review before confirming. Once the invoice has been verified, click on “CONFIRM” to generate the invoice.



The screenshot shows the 'Draft Invoice' screen in Odoo. At the top, there are tabs for 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button. On the right, there is a 'Draft' button with a right arrow and a 'Posted' button. Below the buttons, the customer information is displayed: 'Customer: Titus Health Care, Invoice Address: Aalsmeerderdijk 158C, 1438 AX Oude Meer, Netherlands'. The invoice date is 'Today', payment terms are '30 Days', and the journal is 'Customer Invoices'. The currency is 'EUR' with a conversion rate of '1 CHF = 1.073653 EUR'. The invoice lines table shows two items: 'carevix®' (a suction cervical stabilizer) and 'Freight costs Fedex Shipment'. The total amount is 400.00 €.

Product	Account	Quantity	UoM	Price	Taxes	Amount
[P03-001-001-A1] carevix® is a suction cervical stabilizer to snare,   grasp, hold and manipulate cervical	3200 Sales of goods (Trade)	20	Units	20.00	8.1% Sales	400.00 €
Freight costs Fedex Shipment	3200 Sales of goods (Trade)	1	Units	26.84	8.1% Sales	26.84 €

An invoice has now been posted in Odoo Accounting app, and an invoice number was also allocated. Note that a smart button has now appeared on the SO on the side of the smart button for Delivery, enabling users to go immediately to the invoice straight from the SO screen.



The screenshot shows the 'Sales Order' screen in Odoo. At the top, there are tabs for 'Delivery' and 'Invoices'. A green box highlights the 'Invoices' button. Below the buttons, the order number 'SO-02972' is displayed. The customer information is 'Titus Health Care, Aalsmeerderdijk 158C, 1438 AX Oude Meer, Netherlands [MyAspivix]'. The order date is '11/25/2025 10:36:13', end date is empty, pricelist is 'Distributor - TITUS - Benelux (EUR)', and payment terms are '30 Days'. The delivery address is 'Titus Health Care'. The quotation template is empty. The training status and training date are also empty. The delivery and invoicing addresses are listed at the bottom.

Customer	Invoice Address	Delivery Address	Quotation Template	DELIVERY ADDRESS	INVOICING ADDRESS
Titus Health Care	Titus Health Care, Invoice Address	Titus Health Care			

The invoice can now be sent to the customer. For this purpose, go into the invoice screen, and click on “SEND AND PRINT”.

Sales

Orders

To Invoice

Products

Reporting

Configuration

Orders to Invoice / SO-02972

INV/2025/00153

Sale Orders

1

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Draft

Posted

Customer Invoice

INV/2025/00153

Customer

Titus Health Care, Invoice Address

Aalsmeerderdijk 158C

1438 AX Oude Meer

Netherlands

Invoice Date

11/25/2025

Payment terms

30 Days

Journal

Customer Invoices

in

EUR

Delivery Address ?

Titus Health Care

1 CHF = 1.073653 EUR

### 1.3. Invoicing multiple sales orders

Invoicing multiple Sales Orders at once happens from the same screen of the Sales APP (screen listing all different SOs), or from the screen “Orders to invoice” described above. For invoicing multiple SOs, tick the lines to invoice, click on “Action” and “Create Invoices”. Confirm your choice in the opening screen.

Sales

Orders

To Invoice

Products

Reporting

Configuration

Orders to Invoice

2 selected

Create Invoices

Print

Actions

Export

Insert in spreadsheet

Delete

Accrued Revenue Entry

Create invoice(s)

Cancel

Send an SMS Text Message

Send an email

Mark Quotation as Sent

Change customer

Pause Subscription

Subscription: Generate delivery

<input type="checkbox"/>	Number	Order Date	Customer	Website	Activities
<input checked="" type="checkbox"/>	SO-02963	11/05/2025 17:05:29	partner_a		
<input checked="" type="checkbox"/>	SO-02962	11/05/2025 17:05:26	partner_a		
<input type="checkbox"/>	SO-02951	10/30/2025 14:51:47	Centre médical de Lancy , Katz Deborah		
<input type="checkbox"/>	SO-02856	08/21/2025 10:21:38	Gynpraxis am Graben, Dr. Tanja Eichenberger-Gautschi	MyAspivix	
<input type="checkbox"/>	SO-02781	06/19/2025 16:34:36	UMCL LDA, Alexandra Nikolaeva		
<input type="checkbox"/>	SO-02671	01/10/2025 17:31:27	Centre de Gynécologie de la Veveyse, Dre. med. Letitia Jaccoud		
<input type="checkbox"/>	SO-02623	12/01/2024 20:32:25	Ladies Permanence Stadelhofen, Susanne Baer Altorfer		
<input type="checkbox"/>	SO-02585	08/26/2024 14:14:59	Aspivix Corp.		
<input type="checkbox"/>	SO-02463	01/09/2024 08:59:20	OVA IVF Clinic		

Eric Lluovich

The landing screen Customer Invoices will display the invoices freshly created . These will be saved as **drafts**, not posted into the Accounting APP yet.

As for the previous screen and to confirm the invoices for the related customers, tick the invoices to be confirmed, click in “Action”, and “Post entries”. **This will validate the invoices and record them into the Accounting app.**

Sales Orders To Invoice Products Reporting Configuration

Upload Orders to Invoice Invoices 2 selected X Pay Send Download Actions

Number	Customer
/	Centre médical de Lancy , Katz Deborah
/	Gynpraxis am Graben, Dr. Tanja Eichenberger-Gautschi

Export  
Insert in spreadsheet  
Delete  
Reverse  
Confirm Entries  
Send Bills for digitization

To finally send invoices to customers, repeat the above process, but click in “Send” instead.

Sales Orders To Invoice Products Reporting Configuration

Upload Orders to Invoice Invoices 5 selected X Pay Send Download Actions

Number	Customer	Invoice D...	Due Date
RINV/2025/00003	Ladies Permanence Stadelhofen, Susanne Baer Altorfer	11/25/2025	In 15 days
INV/2025/00159	Aspivix Corp.	11/25/2025	Today
INV/2025/00158	UMCL LDA, Alexandra Nikolaeva	11/25/2025	Today
INV/2025/00157	Centre de Gynécologie de la Veveyse, Dre. med. Letitia Jaccoud	11/25/2025	In 15 days
INV/2025/00156	OVA IVF Clinic	11/25/2025	Today

**Invoices must be validated and sent as soon as the shipment is confirmed**, they must not be delayed in being transmitted to customers.

## 1.4. Crediting an invoice

Any credit note must be approved by International Operations Manager, or by someone within at least the same managerial level in ASPIVIX. **Only credit notes that were approved by ASPIVIX’s management can be processed in Odoo.**

Once a credit note has been fully approved, go into the invoice needing to be reversed by a credit. Click on “ADD CREDIT NOTE” from the invoice screen.

Send Print Pay Preview **Credit Note** Reset to Draft

Draft **Posted**

Customer Invoice

## INV/2025/00158

Customer **UMCL LDA, Alexandra Nikolaeva**  
 Av. Defensores de Chaves 73B  
 Lisbon 1000-114  
 Portugal - PT517826801

Invoice Date 11/25/2025

Due Date 11/25/2025

Delivery Date 06/23/2025

Delivery Address ? **UMCL LDA, Alexandra Nikolaeva**

Journal Customer Invoices in **EUR**

1 CHF = 1.073653 EUR

In the new window:

- Fill the reason for the credit
- Click on "Reverse" to validate

Credit Note

Reason displayed on Credit Note

One box arrived damaged

Journal ?

Customer Invoices

Reversal date

11/25/2025

Reverse

Reverse and Create Invoice

Discard

A draft credit note will be created. It is not yet posted in the Accounting APP at this stage.

**In case of a Partial Refund, modifications can happen at this stage to reduce the amount of credit**, for example, by removing the line of Freight Charges or decreasing the quantities of items credited.

Once the draft credit is verified and ready to be posted, click on "Confirm" in the top left corner. Credit can now be sent following the same process to send a regular invoice (click "Send" in top left corner).

The smart button "Invoices" in the top menu of the SO will now list the total number of invoices and credit notes, all accounting documents related to the initial transaction.

Create Invoice Send by Email Preview Cancel

Quotation Quotation Sent **Sales Order**

## SO-02922

Customer **Irene Uthoff**

Order Date ? 10/16/2025 13:32:11

## 2. REFERENCES

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### 2.1. Procedures, instructions and guidelines

NA

### 2.2. Templates and Forms

NA



# Certificate of Completion

## INS-207-12-rev.B\_ Invoicing and Crediting.pdf

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### Participants

Signatory	Email	Email Verification
Armand Polmard	armand.polmard@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	289beb930acb7c7480ae73fe0b3e0aaf4a060a08efb7beba3e0f7cda445e5141	
Eva Kilimtzi	eva.kilimtzi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	3f97903ae565a14bf4e557f31bdd2ec328d3445986c10e6a735937942aa50b68	
Mauro Rinaldi	mauro.rinaldi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	78638443ccaea43979b1606b4de42a2f233d7b2ddc5d3d6ea75d60850cc12138	




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