





Returning a Shipment

INS-207-14

Rev. B

APPROVAL

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

PURPOSE

This procedure describes how ASPIVIX returns goods from customers. It contains instructions on identifying the original transaction to be returned and creating a return order.

SCOPE

The scope of this procedure includes processing a return shipment in ASPIVIX's inventory, managed through Odoo system.

RESPONSIBILITIES

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager. Any person managing a return in Odoo 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

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1. INSTRUCTION DESCRIPTION

1.1. Approval process

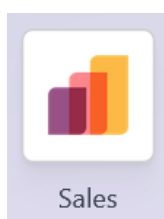
Any return must be approved by the International Operations Manager or someone within at least the same managerial level in Aspivix. **Only returns approved by ASPIVIX's management can be processed in Odoo.**

Once internal approval has been granted, the next step is to identify the original transaction that must be returned, if this step was achieved after the approval.

1.2. Identifying the transaction to return

To return goods from a customer, one must first identify the initial transaction in Odoo to be returned. Such identification can be made by **collecting information from the customer**, such as their order number, the customer's name, their address, contact name, etc.

After collecting the needed information to identify the original transaction at the source of the return request, open the Sales application by clicking on the respective app from the Odoo main dashboard.



In the landing screen of the Sales APP, use the **filter option** and the collected information to find the original transaction.

Search and filter options

Sales Orders To Invoice Products Reporting Configuration

New Upload Quotations ⚙️

<input type="checkbox"/> Number	Creation Date	Customer	
<input type="checkbox"/> SO-02972	11/25/2025 10:30:33	Titus Health Care	
<input type="checkbox"/> SO-02971	11/25/2025 10:12:08	Titus Health Care	
<input type="checkbox"/> SO-02970	11/24/2025 16:37:57	New opportunity #1	
<input type="checkbox"/> SO-02969	11/24/2025 13:02:17	Acme Corp	
<input type="checkbox"/> SO-02968	11/24/2025 12:18:41	company test, testeur	
<input type="checkbox"/> SO-02963	11/05/2025 17:04:42	partner_a	
<input type="checkbox"/> SO-02962	11/05/2025 17:04:24	partner_a	
<input type="checkbox"/> SO-02961	11/05/2025 11:53:17	Frauenpraxis Bubenberq	

Filters

- My Quotations
- Quotations
- Sales Orders
- Create Date
- Recurring
- Not Recurring
- Add Custom Filter

Group By

- Salesperson
- Customer
- Order Date
- Add Custom Group

Favorites

- Payed Orders completed
- Save current search

Sendo Digital Campaign 3011 CHF 43

Once the original Sales Order (SO) has been retrieved, enter the SO by clicking on the line. Then, **click on the smart button "Delivery"** to open the different transfers that took place to ship the goods in the first place.

[Sales](#) [Orders](#) [To Invoice](#) [Products](#) [Reporting](#) [Configuration](#)

[New](#) [Quotations](#) / SO-02972 [Settings](#)

[Delivery](#) 2 [Invoices](#) 1

[Send by Email](#) [Preview](#) [Cancel](#)

[Quotation](#) [Quotation Sent](#) [Sales Order](#)

SO-02972

Customer [Titus Health Care](#)

Order Date [?](#) 11/25/2025 10:36:13

If several inventory transfers relates to this sale order, **select the SHIP transaction** from the list and click on the line to **enter the transfer**. This transaction will display in the “To” column the external location “Customer”.

[Sales](#) [Orders](#) [To Invoice](#) [Products](#) [Reporting](#) [Configuration](#)

[New](#) [Quotations](#) / [SO-02972](#) [Transfers](#) [Settings](#)

[Search...](#)

<input type="checkbox"/>	Reference	From	To	Contact
<input type="checkbox"/> ☆	WDS/OUT/01092	WDS/Output	Partner Locations/Customers	Titus Health Care
<input type="checkbox"/> ☆	WDS/PACK/00325	WDS/Stock	WDS/Output	Titus Health Care

1.3. creating a return order

Once the SHIP transaction that must be reversed is open, a **RETURN button** will show in the top left corner. Click into it to initiate the return.

[New](#) [SO-02972](#) / [Transfers](#) [Settings](#)

[Traceability](#) [Moves](#)

[Print](#) [Return](#)

[Draft](#) [Waiting](#) [Ready](#) [Done](#)

☆ WDS/OUT/01092

Delivery Address [Titus Health Care](#)

Scheduled Date [?](#) 11/25/2025 10:36:13

Operation Type Warehousing & Distribution Switzerland: Shipping

Effective Date [?](#) 11/25/2025 12:19:39

Customer Reference

Source Document [?](#) SO-02972

The opening window will trigger a Reverse Transfer once confirmed. The following steps must take place before confirming the Reverse Transfer:

1. **Set the returned quantities:**
Update the column Quantity with the actual number of items to return.
2. **Click on RETURN** to validate.

Return

×

Product	Quantity	Unit of Measure
[P03-001-001-A1] carevix®	4	Units
<div>Add a line</div>		

Return

Return All

Return for Exchange

Cancel

A return order was now created. This return order can be controlled and validated **ONLY when the goods have physically reached the warehouse** back from the customer.

Within the Note tab of the transfer, INTOPS **includes any element to clarify the context of the return**, such as why the customer returned the goods, approvals, product pictures, etc.

New

Transfers / WDS/OUT/01092
WDS/RET/00020

Moves

Quality Checks

Validate

Quality Checks

Print

Return

Cancel

Draft

Ready

Done

☆ WDS/RET/00020

Receive From

Titus Health Care

Scheduled Date ?

11/25/2025 13:18:01

Operation Type

Warehousing & Distribution Switzerland: Returns

Source Document ?

Return of WDS/OUT/01092

Customer Reference

Destination Location

WDS/Stock

Include any note relevant to the return, to provide context and explanations

Operations

Additional Info

Note

Documentation

Product	Packaging	Demand	Quantity	Unit
[P03-001-001-A1] carevix®	18.41	4	4	Units
<div>Add a line</div>				

Put in Pack

1.4. Perform Quality Check: Return Control

Based on the information passed by INTOPS, **the Quality Department performs a Quality Check to move the return to the next stage.**

A quality check is mandatory to verify and record the integrity of the packaging and labeling of the incoming return before it can be moved to the next stage. The control can pass or fail depending on the inspection results and available information on the returned product. RAQM must validate the control to release the product to the inventory, deciding if the return will go back into sellable inventory.

New

Transfers

WDS/OUT/01092

WDS/RET/00020

Moves

Quality Checks

Validate

Quality Checks

Print

Return

Cancel

Draft

Ready

Done

☆

WDS/RET/00020

To start the Return Control, RAQM **clicks in the field Quality Checks**, and follow instructions that will appear on screen.

Click on the WORKSHEET button in the instruction screen to start recording the control results. Once characteristics have been filled, click on save. If the control is a “fail”, a failure message will appear and provide the possibility to **either confirm the failed status or correct the worksheet**.

Once the control has been saved, the control status can be “pass” or “fail”, depending on the inspection results, and recorded as green for a pass and red for a failure. If the control is a “fail”, you may create a Quality Alert, if required, to do so in the failure message.

RAQM informs INTOPS about the completion of the validation using the History Overview.

INTOPS clicks on **VALIDATE** to move the items to Allocation Inventory in the top left corner of the screen or dispose of the goods otherwise.

1.5. Display

Going back to the original SO, the **Delivery smart button will now show additional transactions** related to this SO.

As an example, a standard SO could display 3 transactions:

- **1 transaction to ship the goods to the customer:**
- **2 transactions to return the goods from the customer:**
 - One return transaction, to bring the goods back from the customer to QC sub-inventory
 - One transaction from QC to dispose of the goods (either to bring them back into stock, to keep them under hold, or to scrap them)

Sales Orders To Invoice Products Reporting Configuration

New

Sales Orders

SO-02972

Delivery 3

Invoices 1

Send by Email

Preview

Cancel

Quotation

Quotation Sent

Sales Order

SO-02972

Customer Titus Health Care

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

2. REFERENCES

2.1. Procedures, instructions and guidelines

NA

2.2. Templates and Forms

NA

Certificate of Completion

INS-207-14-rev.B - Returning a Shipment.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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Signature 	Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:12:24	47.5480858, 7.5673173 View	104.28.98.105
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Aspivix SA, Eva Kilimtzi eva.kilimtzi@aspivix.com	11/26/2025 12:04:39	Before Signature	46.4884000, 6.6557000  View	178.192.218.57
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