

## APPROVAL

Role	Name	Function	Date & Signature
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Approver	Mauro Rinaldi	RAQM	

## 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

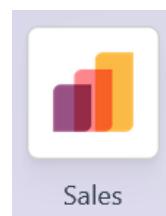
Any return must be approved by the International Operations Manager or someone within at least the same managerial level in Aspivix. **Only returns approved by ASPIVIX's management can be processed in Odoo.**

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.

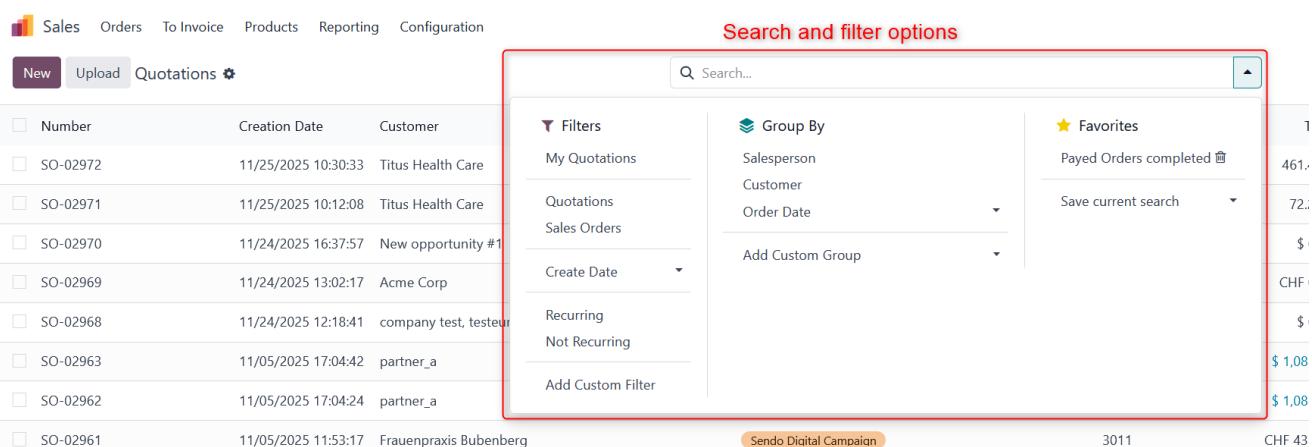
### 1.2. Identifying the transaction to return

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.

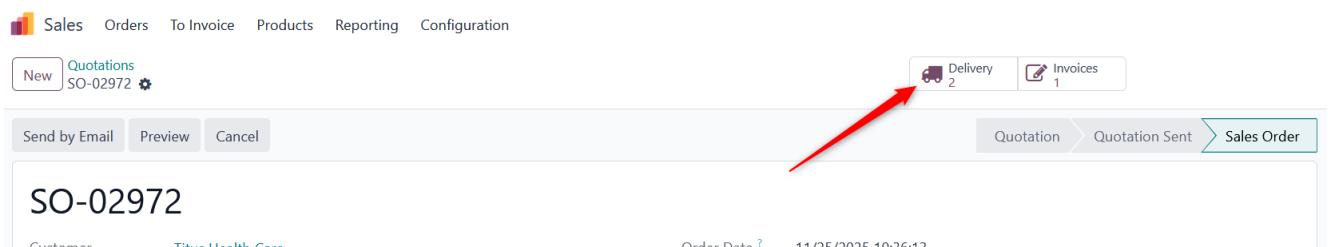


In the landing screen of the Sales APP, use the **filter option** and the collected information to find the original transaction.



The screenshot shows the Odoo Sales application interface. At the top, there is a navigation bar with links: Sales, Orders, To Invoice, Products, Reporting, and Configuration. Below the navigation bar, there is a toolbar with buttons for New, Upload, and Quotations. The main area displays a list of Sales Orders (SO) with columns for Number, Creation Date, and Customer. A red box highlights the 'Search and filter options' sidebar on the right, which includes sections for Filters, Group By, and Favorites. The 'Filters' section contains dropdowns for My Quotations, Quotations, Sales Orders, Create Date, Recurring, and Not Recurring. The 'Group By' section includes dropdowns for Salesperson, Customer, and Order Date, along with an 'Add Custom Group' button. The 'Favorites' section lists 'Payed Orders completed' and 'Save current search'.

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

Send by Email Preview Cancel

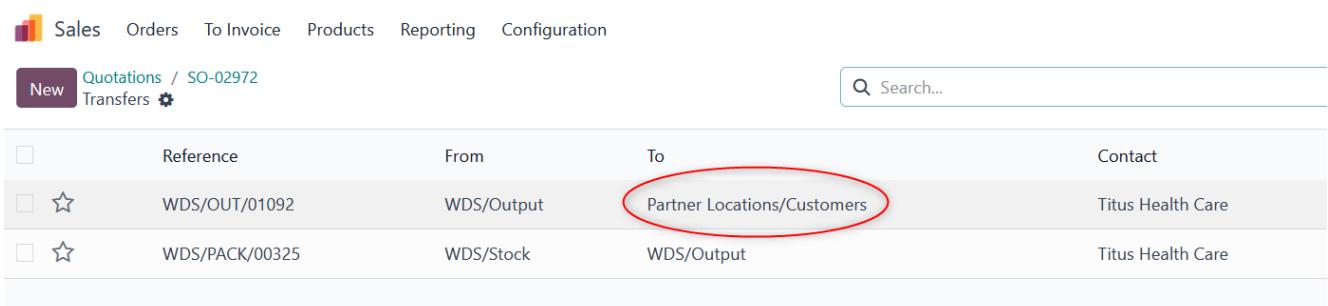
Quotation Quotation Sent Sales Order

**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

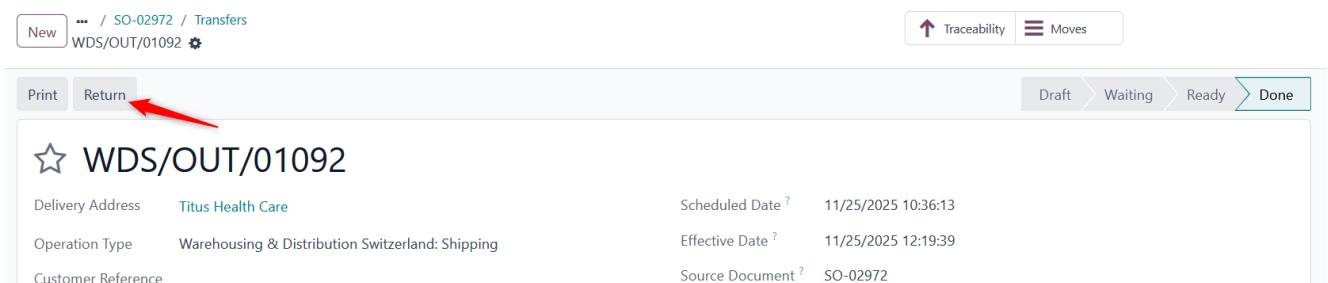
New Quotations / SO-02972 Transfers

Search...

	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

WDS/OUT/01092

Print Return

Traceability Moves

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

X

Product	Quantity	Unit of Measure	
[P03-001-001-A1] carevix®	4	Units	
<a href="#">Add a line</a>			
 <a href="#">Return</a> <a href="#">Return All</a> <a href="#">Return for Exchange</a> <a href="#">Cancel</a>			

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](#)

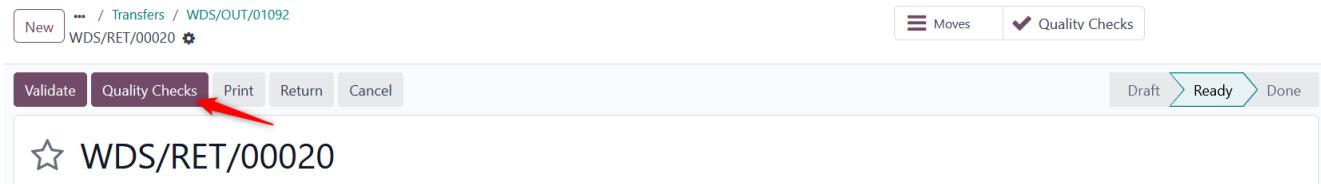
 **WDS/RET/00020**

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					
<a href="#">Operations</a> <a href="#">Additional Info</a> <a href="#">Note</a> <a href="#">Documentation</a>					
Product	Packaging	Demand	Quantity	Unit	
[P03-001-001-A1] carevix®	18.41	4 	4	Units	
<a href="#">Add a line</a>					
<a href="#">Put in Pack</a>					

#### 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.



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.

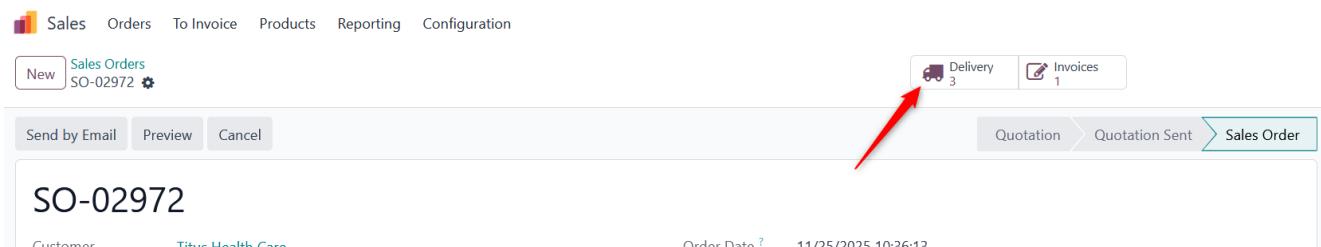
INTOPS **clicks on VALIDATE** to move the items to Allocation Inventory in the top left corner of the screen or dispose of the goods otherwise.

## 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)



## **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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### Document Details

**Created by:** Armand Polmard **Document ID:** 789  
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**Signers:** 3 **e4f24378e3622057b6627af**

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