




**APPROVAL**

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PURPOSE

This procedure describes how ASPIVIX ships sales orders in its ERP system and updates inventory levels. It contains instructions on processing sales orders after a quotation is validated, removing items from stock, and confirming the shipping of goods to customers.

SCOPE

The scope of this procedure includes any shipment of a sales order, whether a real sale transaction or a free-of-charge shipment, managed through ASPIVIX's ERP system.

Out of scope is:

- how to physically pick and pack items for shipment
- how to edit an Air Way Bill

RESPONSIBILITIES

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager. Any person shipping ASPIVIX's items to end customers 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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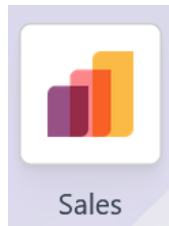
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1. INSTRUCTION DESCRIPTION

1.1. Identifying Sales orders to ship

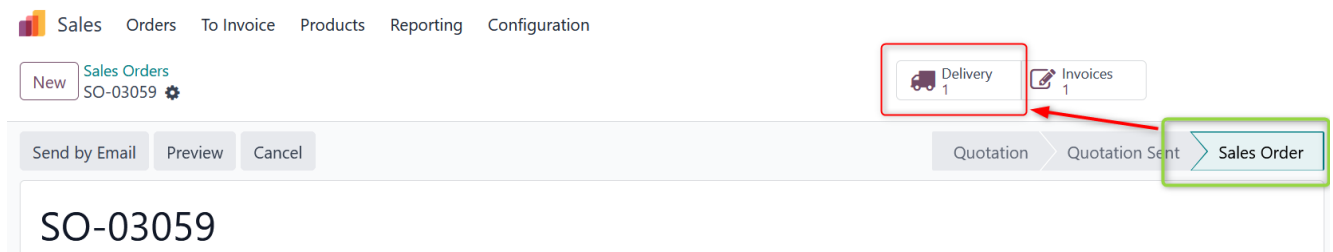
Only approved quotations are eligible for shipment. When a quotation is approved, it gets transitioned **from quotation to Sales Order Status** and can be processed further for shipping.

To visualize such Sales Orders (SO), first, open the Sales application by clicking in the respective app from Odoo main dashboard.



1.2. Shipping a single Sales Order

Once you have identified the SO you want to ship, enter it by clicking on the corresponding line. When a quotation is approved, **delivery(ies) are created** to manage the shipment, and a new button will appear on the top of the SO.



To access these deliveries and process the SO further, click on the Delivery button. One Inventory transfer is created for each step that must be completed to deliver the goods to the customer. Currently only the step "Shipping" is registered in Odoo.

1.3. Shipping

Open the shipping order, its status will appear as “Ready” meaning that every product is available and that the inventory transfer is ready to be executed.

Odoo will propose a lot or multiple lots to pick by default based on FEFO (First Expired First Out) rule, with associated quantities.

New

Sales Orders / SO-03059

MDC2/SHIP/00047

Moves

Validate

Print

Return

Cancel

Draft

Waiting

Ready

Done

☆ MDC2/SHIP/00047

Delivery Address

Naturopathic Clinic of Issaquah

Scheduled Date ?

11/24/2025 19:00:52

Operation Type

Miami Distribution Center 2: Shipping

Deadline ?

11/24/2025 19:00:52

Customer Reference

Product Availability ?

Available

Source Location

MDC2/Stock

Source Document ?

SO-03059

Operations

Additional Info

Note

Documentation

Product	Kit	Packaging	Demand	Quantity	Unit	
[P03-001-001-A1] carevix®	carevix® 5+5 Starter Kit - 1/1		5	5	Units	
[P03-001-001-A1] carevix®		18.41	5	5	Units	
Carevix demo		1	1	1	Units	
Patient Brochure US			1	1	Box of 10	
Waiting Room Poster US			1	1	Units	

Add a line

Put in Pack

Quantities that are available in stock and reserved for that transfer

If the transfer appears as “Waiting”, it means that all the requested products are not available at the moment. In such case, you'll need to replenish the stock before clicking on “Check availability”.

New Sales Orders / SO-03059 MDC2/SHIP/00047

Check Availability Validate Return Cancel

Need to replenish the stock then reserve it by clicking on "Check availability"

Product Availability ? Not Available

Scheduled Date ? 11/24/2025 19:00:52

Deadline ? 11/24/2025 19:00:52

Source Document ? SO-03059

Delivery Address Naturopathic Clinic of Issaquah

Operation Type Miami Distribution Center 2: Shipping

Customer Reference

Source Location MDC2/Stock

Operations	Additional Info	Note	Documentation
Product	Kit	Packaging	Demand Quantity Unit
[P03-001-001-A1] carevix®	carevix® 5+5 Starter Kit - 1/1		5 0 Units
[P03-001-001-A1] carevix®		18.41	5 0 Units
Carevix demo		1	1 0 Units
Patient Brochure US			1 0 Box of 10
Waiting Room Poster US			1 0 Units

Add a line

All the requested quantities are not reserved

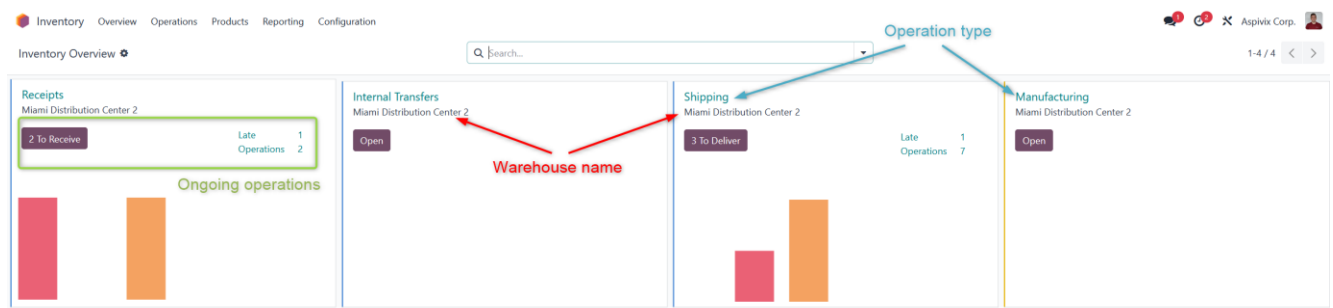
Once the picking has been scheduled with the delivery carrier, click on "Validate".

1.4. Inventory Overview

To access all the shipments, first open the Inventory application by clicking in the respective app from Odoo's main dashboard.



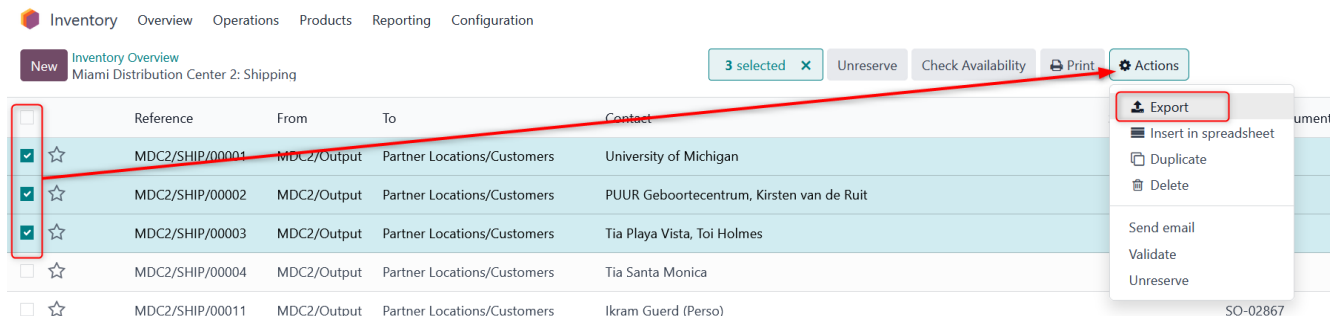
The landing screen will display a card view of the transactions to process, if any. It includes the transfers to process ship orders and other transaction cards used for other inventory movements.



1.5. Exporting Picking transactions

It may be required to export multiple picking orders, for example, to pick a few SOs at once. For this purpose, click the three dots on the top right of the required Picking card and then on Operations.

In the operations screen, select all or multiple deliveries you want to export, then click Action and Export.




The screenshot shows the 'Inventory Overview' screen for 'Miami Distribution Center 2: Shipping'. A table lists shipping transactions with columns: Reference, From, To, and Contact. Three rows are selected (checked). The 'Actions' menu is open, showing options: Export, Insert in spreadsheet, Duplicate, Delete, Send email, Validate, and Unreserve. A red arrow points from the 'Export' option in the menu to the '3 selected' button at the top of the table.

Reference	From	To	Contact
MDC2/SHIP/00001	MDC2/Output	Partner Locations/Customers	University of Michigan
MDC2/SHIP/00002	MDC2/Output	Partner Locations/Customers	PUUR Geboortecentrum, Kirsten van de Ruit
MDC2/SHIP/00003	MDC2/Output	Partner Locations/Customers	Tia Playa Vista, Toi Holmes
MDC2/SHIP/00004	MDC2/Output	Partner Locations/Customers	Tia Santa Monica
MDC2/SHIP/00011	MDC2/Output	Partner Locations/Customers	Ikram Guerd (Perso)

This will generate an Excel file that can be used for multiple picking or forwarded to an outsourced warehouse for processing.

1.6. Multiple shipping

To confirm picking for multiple orders in the system, **click the “X To Deliver” box** within a picking card from the Inventory app landing screen.



The screenshot shows the 'Shipping' screen for 'Miami Distribution Center 2'. It features a bar chart with two bars, one pink and one orange. A button labeled '3 To Deliver' is highlighted with a red arrow. To the right of the chart, there is a summary: 'Late 1' and 'Operations 7'.

Select all or the multiple deliveries you want to process from this window, and click Action and Validate.

Inventory
Overview
Operations
Products
Reporting
Configuration

New
Inventory Overview
Miami Distribution Center 2: Shipping
3 selected
Unreserve
Check Availability
Print
Actions

	Reference	From	To	Contact	Sched
<input checked="" type="checkbox"/>	MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Naturopathic Clinic of Issaquah	Yesterday
<input checked="" type="checkbox"/>	MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Hisae Tsurumi	Today
<input checked="" type="checkbox"/>	MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Summit Health Obstetrics and Gynecology, Julianne Dunne, MD	Today

Export
Insert in spreadsheet
Duplicate
Delete
Send email
Validate
Unreserve

Deliveries selected will disappear from the Shipping card reminder, you can still access every shipment by clicking on the card's name directly.

2. REFERENCES

2.1. Procedures, instructions and guidelines

NA

2.2. Templates and Forms

NA

Certificate of Completion

INS-207-13-rev.B_ Shipping a Sales Order.pdf

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a4753cae2613f93b6773449

Participants

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




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