

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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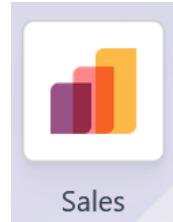
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1. INSTRUCTION DESCRIPTION

1.1. Identifying Sales orders to ship

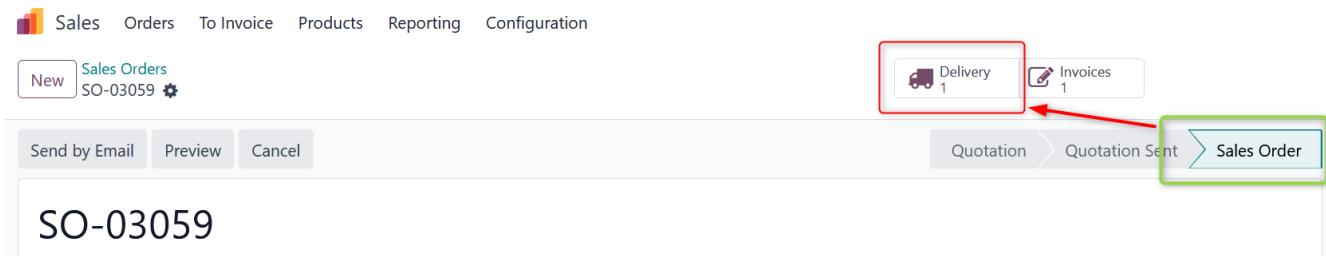
Only approved quotations are eligible for shipment. When a quotation is approved, it gets transitioned **from quotation to Sales Order Status** and can be processed further for shipping.

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.



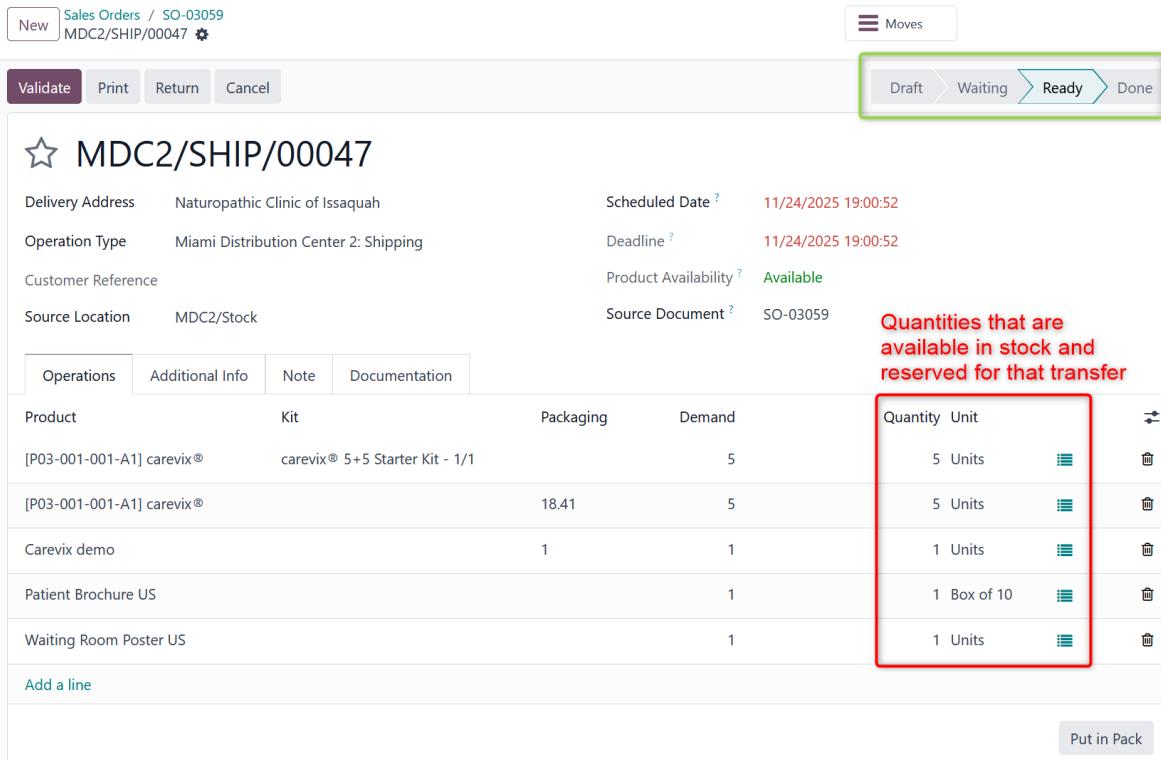
To access these deliveries and process the SO further, click on the Delivery button.

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.



The screenshot shows the Odoo Sales Orders interface for a shipping order. The top navigation bar includes 'New', 'Sales Orders / SO-03059', 'MDC2/SHIP/00047', 'Moves', 'Validate', 'Print', 'Return', 'Cancel', and a status bar showing 'Draft > Waiting > Ready > Done'. The main content area displays the order details: Delivery Address (Naturopathic Clinic of Issaquah), Operation Type (Miami Distribution Center 2: Shipping), Customer Reference, Source Location (MDC2/Stock), Scheduled Date (11/24/2025 19:00:52), Deadline (11/24/2025 19:00:52), Product Availability (Available), and Source Document (SO-03059). A red box highlights the text 'Quantities that are available in stock and reserved for that transfer' above the product list. The product list table has columns: Product, Kit, Packaging, and Demand. The table rows are: [P03-001-001-A1] carevix® (carevix® 5+5 Starter Kit - 1/1), [P03-001-001-A1] carevix® (18.41), Carevix demo (1), Patient Brochure US (1), and Waiting Room Poster US (1). To the right of the table is a quantity grid with columns: Quantity, Unit, and a delete icon. The grid rows are: 5 Units, 5 Units, 1 Units, 1 Box of 10, and 1 Units. A 'Put in Pack' button is at the bottom right.

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”.

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

Scheduled Date: 11/24/2025 19:00:52
Deadline: 11/24/2025 19:00:52
Product Availability: Not Available

Demand

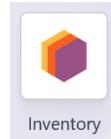
	Demand	Quantity	Unit
[P03-001-001-A1] carevix®	5	0	Units
[P03-001-001-A1] carevix®	5	0	Units
Carevix demo	1	0	Units
Patient Brochure US	1	0	Box of 10
Waiting Room Poster US	1	0	Units

All the requested quantities are not reserved

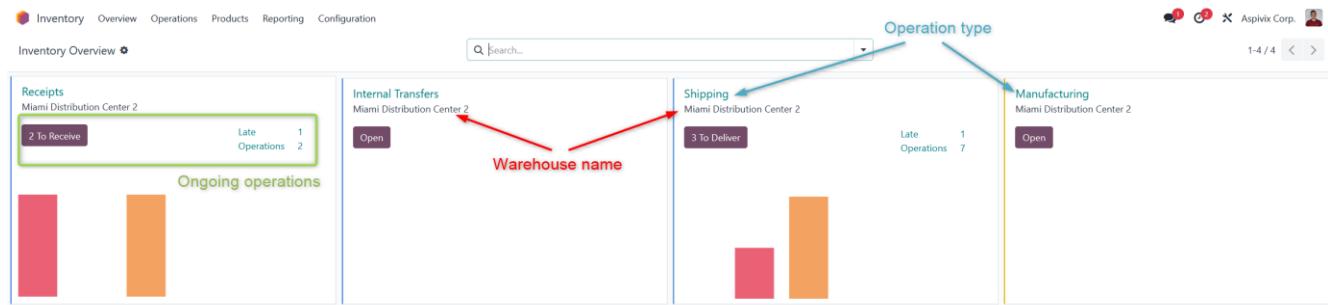
Once the picking has been scheduled with the delivery carrier, click on "Validate".

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.



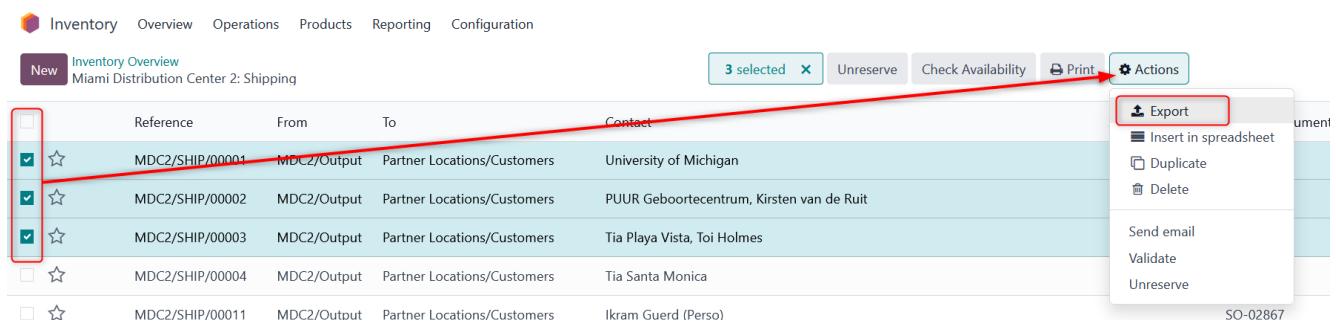
The landing screen will display a card view of the transactions to process, if any. It includes the transfers to process ship orders and other transaction cards used for other inventory movements.



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.



Inventory Overview
Miami Distribution Center 2: Shipping

3 selected Unreserve

	Reference	From	To	Contact
<input type="checkbox"/>	MDC2/SHIP/00001	MDC2/Output	Partner Locations/Customers	University of Michigan
<input checked="" type="checkbox"/>	MDC2/SHIP/00002	MDC2/Output	Partner Locations/Customers	PUUR Geboortecentrum, Kirsten van de Ruit
<input checked="" type="checkbox"/>	MDC2/SHIP/00003	MDC2/Output	Partner Locations/Customers	Tia Playa Vista, Toi Holmes
<input type="checkbox"/>	MDC2/SHIP/00004	MDC2/Output	Partner Locations/Customers	Tia Santa Monica
<input type="checkbox"/>	MDC2/SHIP/00011	MDC2/Output	Partner Locations/Customers	Ikram Gued (Perso)

SO-02867

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.

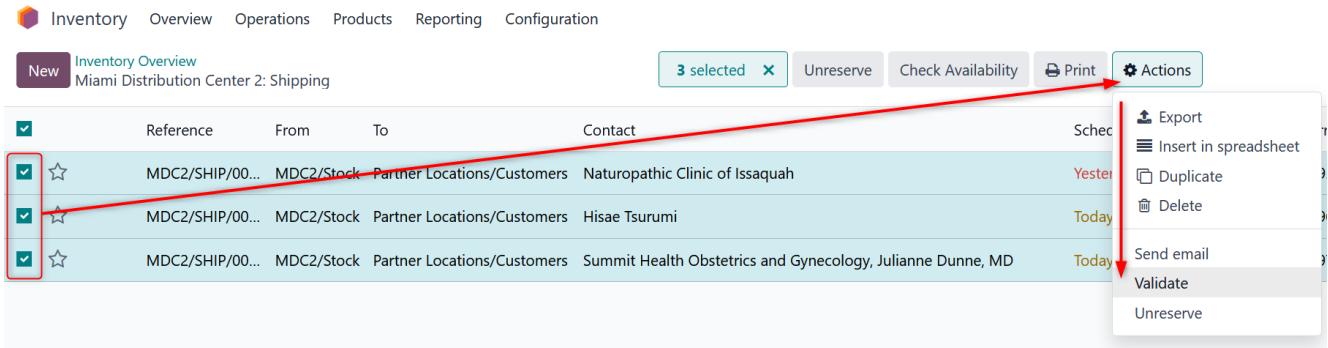


Shipping
Miami Distribution Center 2

3 To Deliver

Late 1
Operations 7

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



Inventory Overview

Miami Distribution Center 2: Shipping

3 selected

Unreserve Check Availability Print Actions

Actions

- Export
- Insert in spreadsheet
- Duplicate
- Delete
- Send email
- Validate**
- Unreserve

Reference	From	To	Contact	Sched
MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Naturopathic Clinic of Issaquah	Yesterday
MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Hisae Tsurumi	Today
MDC2/SHIP/00...	MDC2/Stock	Partner Locations/Customers	Summit Health Obstetrics and Gynecology, Julianne Dunne, MD	Today

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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Mauro Rinaldi	mauro.rinaldi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	78638443ccaea43979b1606b4de42a2f233d7b2ddc5d3d6ea75d60850cc12138	

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Signature 	Aspivix SA, Eva Kilimtzidi eva.kilimtzidi@aspivix.com	11/26/2025 12:04:48	46.4884000, 6.6557000	178.192.218.57
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