

STOCK EXCHANGE USER MANUAL

INTRODUCTION

Stock Exchange module allows us to exchange the products from odoo backend which is already delivered and invoiced.

FEATURES

- Can easily exchange from return wizard.
- Can specify the exchange quantity..
- Can specify the other products too.
- Separate exchange orders.
- Mapping between exchange orders and original sale orders through smart buttons.
- Mapping between exchange pickings and original picking through smart buttons and widget.
- Preparing the invoice, credit notes automatically.

INSTALLATION

Now simply follow these steps:

1. Go to settings menu and click on Activate the Developer mode.
2. Now go to apps menu and Click on 'Update Modules List'.
3. Remove the app's filter and search for the the word 'stock_exchange'.
4. Now you will see the module then simply install it.

After installing you will be able to handle different functionality as mentioned in module's work flows.

WORK FLOWS

After validating **Stock Picking** of sales order, click **"Return"**

The screenshot shows the Odoo Sales interface. At the top, there's a navigation bar with 'Sales' selected. Below it, a breadcrumb trail shows 'Transfers / WH/OUT/00024'. A toolbar contains buttons for 'Print', 'Return', 'Scrap', and 'Unlock'. The 'Return' button is highlighted. On the right, a status bar shows 'Draft', 'Waiting', 'Ready', and 'Done'. A modal window displays details for 'WH/OUT/00024', including Partner (Gemini Furniture, Soham Palmer), Operation Type (YourCompany: Delivery Orders), Scheduled Date (09/31/2019 13:47:50), Effective Date (09/31/2019 13:47:57), Source Document (SO045), and Exchange Order.

On the wizard we have to click the check box **"To Exchange"** and give the required details and submit the form.

The screenshot shows the 'Reverse Transfer' wizard in Odoo. The wizard has a table with columns: Product, Quantity, To Refund (update SO/PO), To Exchange, Exchange Quantity, and Exchange Other Product. The table contains four rows: [FURN_6666] Acoustic Bloc Screens (5.000), [FURN_8999] Three-Seat Sofa (6.000), [FURN_8888] Office Lamp (23.000), and [FURN_7777] Office Chair (33.000). The 'To Exchange' checkbox is checked for the Office Chair row. Below the table, there are 'Return' and 'Cancel' buttons. At the bottom, there's a table with columns: Product, Initial Demand, and Done. The table contains three rows: [FURN_6666] Acoustic Bloc Screens (5.000, 5.000), [FURN_8999] Three-Seat Sofa (6.000, 6.000), and [FURN_8888] Office Lamp (23.000, 23.000).

Make sure that it is **invoiced**

The screenshot shows the 'Reverse Transfer' wizard in Odoo. A modal window displays an 'Odoo Server Error - Warning' message: 'Only invoiced qty of product lines are allowed. Please correct the following lines: Acoustic Bloc Screens, Three-Seat Sofa, Office Lamp, Office Chair'. The message lists the products that are not yet invoiced. Below the message, there is an 'Ok' button. At the bottom of the wizard, there are 'Return' and 'Cancel' buttons.

There we can also put **various inputs** like the following pic.

UT/00027

Reverse Transfer

Product	Quantity	To Refund (update SO/PO)	To Exchange	Exchange Quantity	Exchange Other Product
[FURN_6666] Acoustic Bloc Screens	5.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5.000	[E-COM06] Corner Desk Right Sit
[FURN_8999] Three-Seat Sofa	6.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.000	
[FURN_8888] Office Lamp	23.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10.000	
[FURN_7777] Office Chair	33.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	33.000	

Return Cancel

Operations Additional Info Note

Product	Initial Demand	Done
[FURN_6666] Acoustic Bloc Screens	5.000	5.000
[FURN_8999] Three-Seat Sofa	6.000	6.000
[FURN_8888] Office Lamp	23.000	23.000
[FURN_7777] Office Chair	33.000	33.000

We can see various **smart buttons** on the **sale orders** for linking with **Exchange Orders, Exchange Pickings, Exchange Invoices, Exchange Credit Notes, etc**

SO047

2 Delivery

1 Exchanges

1 Exchange D...

1 Exchange In...

1 Invoices

Customer

Invoice Address

Delivery Address

Quotation Template

Gemini Furniture

Gemini Furniture, Soham Palmer

Gemini Furniture, Soham Palmer

Confirmation Date

Payment Terms



08/31/2019 16:28:32

Order Lines


Optional Products

Other Information

We can see **smart buttons** for the records of **Credit Notes**, **Invoices**, **Exchange Deliveries**.

PE004		 ¹ Delivery		 ² Invoices	
Customer	Gemini Furniture	Confirmation Date	08/31/2019 13:41:54		
Invoice Address	Gemini Furniture	Payment Terms			
Delivery Address	Gemini Furniture	Origin Order	SO044		

Exchange Credit Note

	Sales	Orders	To Invoice	Products	Reporting	Configuration
-------------------------------------------------------------------------------------	--------------	--------	------------	----------	-----------	---------------

Exchange Orders / PE006 / INV/2019/0008

[Edit](#) [Create](#)

[Send & Print](#) [Register Payment](#) [Preview](#)

You have **outstanding payments** for this customer. You can allocate them to mark this invoice as paid.

Credit Note

INV/2019/0008

Customer

Gemini Furniture
1128 Lunetta Street

Exchange Invoice

Sales

OrdersTo InvoiceProductsReportingConfiguration

Exchange Orders / PE004 / Invoices / INV/2019/0005

EditCreate

Print ▾

Send & PrintRegister PaymentAdd Credit NotePreview

You have **outstanding payments** for this customer. You can allocate them to mark this invoice as paid.

INV/2019/0005

Customer

Gemini Furniture
1128 Lunetta Street
Tampa FL 33634
United States

Delivery Address

Gemini Furniture

Payment Terms

Exchange Delivery Picking

Sales

OrdersTo InvoiceProductsReportingConfiguration

Exchange Orders / PE006 / WH/OUT/00028

EditCreate

Print ▾Action ▾

Check AvailabilityValidatePrintCancelUnreserveScrapUnlock

WH/OUT/00028

Partner

Gemini Furniture

Operation Type

YourCompany: Delivery Orders

A widget

