Item Exchange Inbox

Module Guide: Item Exchange Inbox

Module Location

Inventory > Item Exchange > Item Exchange Inbox

Module Objective

The **Item Exchange Inbox** module serves as the approval center for all **Item Exchange** documents that have been submitted. Every item exchange transaction (both the receipt of the returned item and the shipment of the replacement item) must be reviewed and approved here by an authorized manager before the stock movements are officially recorded in the system.

1. Main View (Document List)

The main page of this module is an "inbox" that displays all exchange documents requiring your action.

View Explanation

This page provides a summary of all exchange transactions that are awaiting approval.

- **Filters**: You can search for a specific document by **Exchange Number, Item/Service Category,** or a **Date** range.
- **Document List**: The table below will display all documents awaiting action, with columns such as **Exchange Number,**

Customer Vendor, Reference Number, and **Approval**.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Item Exchange Inbox** module to see the list of transactions that require approval.

Step 2: Review the Exchange Details

Click on one of the rows in the table to open the detail view of the exchange document. In the detail page, you can check all the information, such as the returned item, the replacement item, and the original delivery order reference.

Step 3: Provide Approval

After you review the exchange details in Step 2, you will find a button to grant approval (e.g., an **"Approve"** button) **within that detail page**. Click the appropriate button to complete the review process.

Workflow & Integrated Business Process

1. An Item Exchange document is created and confirmed.
2. The document automatically enters the queue in this **Inbox**.
3. A manager (e.g., a Customer Service Manager or Warehouse Head) reviews and approves it.
4. After approval, the system will finally process the **two stock movements**: increasing the stock of the returned item and

decreasing the stock of the replacement item.

Tips & Important Notes

- This approval process is an important control step to ensure all return and exchange transactions are valid.
- This module is typically accessed by a **Customer Service Manager or Warehouse Head**.

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