




## APPROVAL

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## PURPOSE

This instruction establishes a standardized process for managing, in ASPIVIX's Odoo database, customer master data accurately and efficiently, archiving irrelevant contacts to maintain a clean database, and enabling proper customer segmentation and retention.

## SCOPE

This instruction covers the processes of managing customer master data generated from interactions with patients, healthcare professionals, potential distributors, and others in Odoo.

## RESPONSIBILITIES

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager.

Any internal user creating a contact in Odoo must respect and apply this instruction.

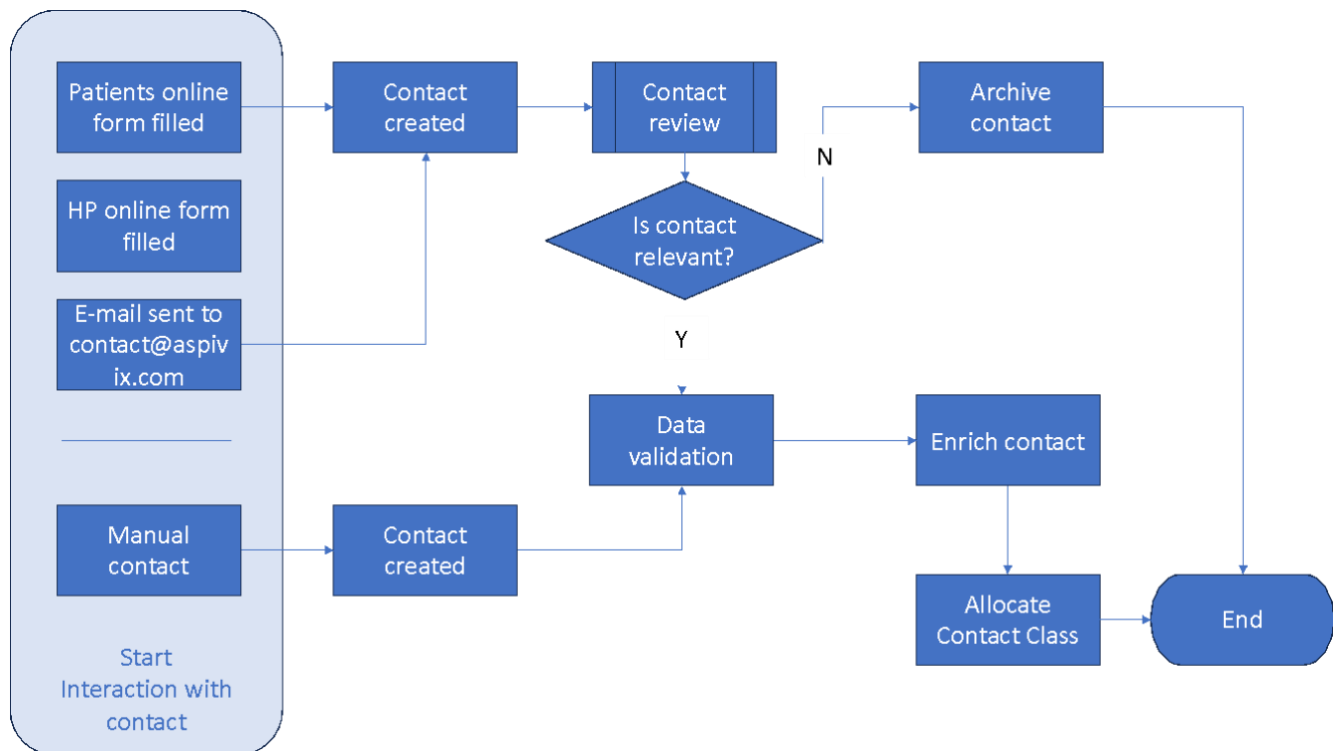
## DOCUMENT HISTORY

Description of Changes	Version
Initial version.	A
Remove date from approval table. The procedure has been reviewed and is still applicable.	B

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## 1 PROCESS FLOW



## 2 INSTRUCTION DESCRIPTION

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### 2.1 CONTACT CREATION

Contacts can originate from 2 two different sources: they can be created automatically or generated manually through data entry by an internal user.

#### 2.1.1 Automatically created contacts

A contact record can be created automatically from the following events:

- An e-mail sent to [contact@aspivix.com](mailto:contact@aspivix.com) connected to the Odoo Helpdesk application that will automatically create a contact in the Odoo database
- A contact form was filled in on [MyAspivix.com](http://MyAspivix.com), either the one for patients or the one for healthcare professionals

For contacts created automatically in Odoo, review the interest ASPIVIX may have in the query submitted (refer to INS-205-04 for ticket management). The review will result in one of the two following decisions:

- If the contact was created out of spam or a query irrelevant to ASPIVIX's business or operations (marketing e-mails, IT services, mass mailing, etc.), archive the contact immediately and stop the activity.
- If the contact created bears some interest in ASPIVIX business or operations (contact from a patient, a healthcare professional, or a potential distributor), go to Chapter 2.2.

#### 2.1.2 Manually created contacts

A contact record can be created manually by an internal Odoo user after the identification of a prospect, a business partner, or a patient.

For contacts created manually, go to Chapter 2.2.

### 2.2 DATA VALIDATION/VERIFICATION

Performs initial validation of the data, checking for completeness and accuracy.

Ensure that sufficient information is available to treat and use the contact properly. Some of these information may include:

- Regarding patients: e-mail address, country, and potentially state or location.
- Regarding Healthcare Professionals: name and title or function, e-mail address, Country and address, an affiliated organization, and internal notes as applicable\*.
- Regarding Business Partners: company name and contacts, e-mail addresses, websites, and internal notes if applicable.
- Internal notes, if applicable, to facilitate identification and follow-up. These can include the history of conversations, notes regarding the interest of the contact, etc.

Communicate with the data source for any missing or unclear information.

### 2.3 DATA ENTRY AND UPDATE

Enter data at the contact level to enrich the record, such as contact name, country, e-mail, phone number, etc.

Select a value in the field Contact Class to determine its category based on the following classification:

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- **Healthcare professionals:** this category includes anyone or any institution using ASPIVIX's products interested in using it. This category includes hospitals, clinics, medical schools, universities, private offices or doctors, nurses, midwives, pharmacists, general practitioners, gynecologists, and anyone or any institution using ASPIVIX or interested in using it.
- **Patients:** all individuals inquiring about an ASPIVIX product for a procedure for themselves or a relative.
- **Business Partners:** distributors or purchasing groups within one country or through different geographies.
- **Others:** All other contacts, such as investors, suppliers, students and teachers, jobseekers, journalists, education centers, insurance companies, service providers, restaurants, and local shops

### 3 REFERENCES

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#### 3.1 PROCEDURES, INSTRUCTIONS AND GUIDELINES

[1] INS-205-04

#### 3.2 TEMPLATES AND FORMS

NA

# Certificate of Completion

## INS-207-1 Managing Customer Master Data\_Rev.B.pdf

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### Participants

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Email Verification: The signatory has confirmed control of their email inbox by clicking on a unique link

### Signing Events

Action	By	Date (UTC)
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[contact@aspivix.com](mailto:contact@aspivix.com) | <https://aspivix.com>

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Action	By	Date (UTC)
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Signature 	Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	12/02/2025 10:31:40
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The final document and this completion history have been sent by email on 12/02/2025 to:  
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## Access Logs

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