APPROVAL

Role	Name	Function	Signature
Author	Armand Polmard	ITS	*Armand Polmard*
Reviewer	Eva Kilimtzidi	QA&SA	Signed with Odoo Sign 5c82ba4897...
Approver	Mauro Rinaldi	RAQM	Signed with Odoo Sign

PURPOSE

The purpose of this Instruction is to explain the steps to access and customize an Odoo user account and highlight basic functionalities for navigation and utilization that can be applied through all applications in Odoo.

SCOPE

This Instruction covers the utilization of Odoo by internal ASPIVIX users.
Out of scope is the utilization of a customer portal for external customers.

RESPONSIBILITIES

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager. Any internal user working with ASPIVIX's ERP system 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

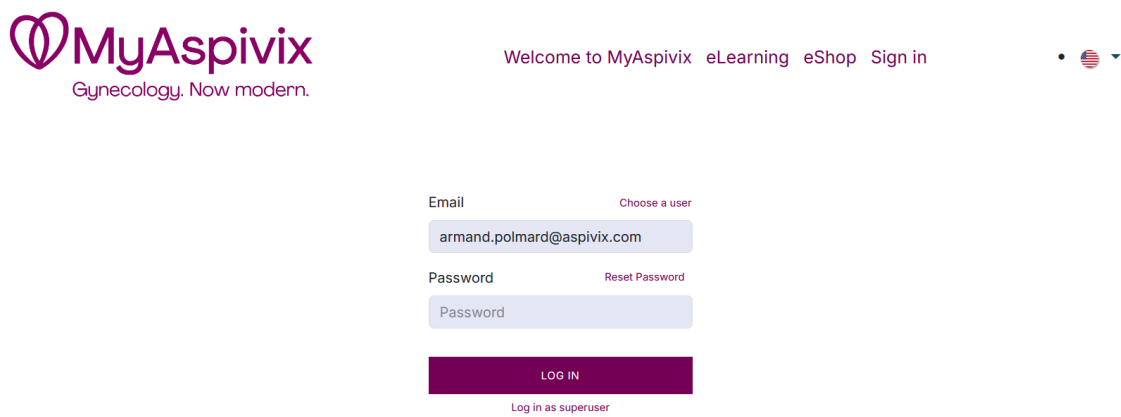**TABLE OF CONTENT**

1   INSTRUCTION DESCRIPTION

1.1   CONNECT TO ODOO

Odoo must be operated from Google Chrome or Mozilla Firefox, Safari (among other web browsers) is not recommended due to its lack of modern JavaScript methods. Once in your personal web browser, access the ASPIVIX database in Odoo using the following link: https://myaspivix.com/. Make sure to bookmark the Odoo environment for easy access later on.

Then use your Odoo credentials to connect to your account as shown below:

You will access Odoo main dashboard, where the different applications (called "APPs") are listed as icons. The list of applications may vary from the picture below depending on your account access rights.
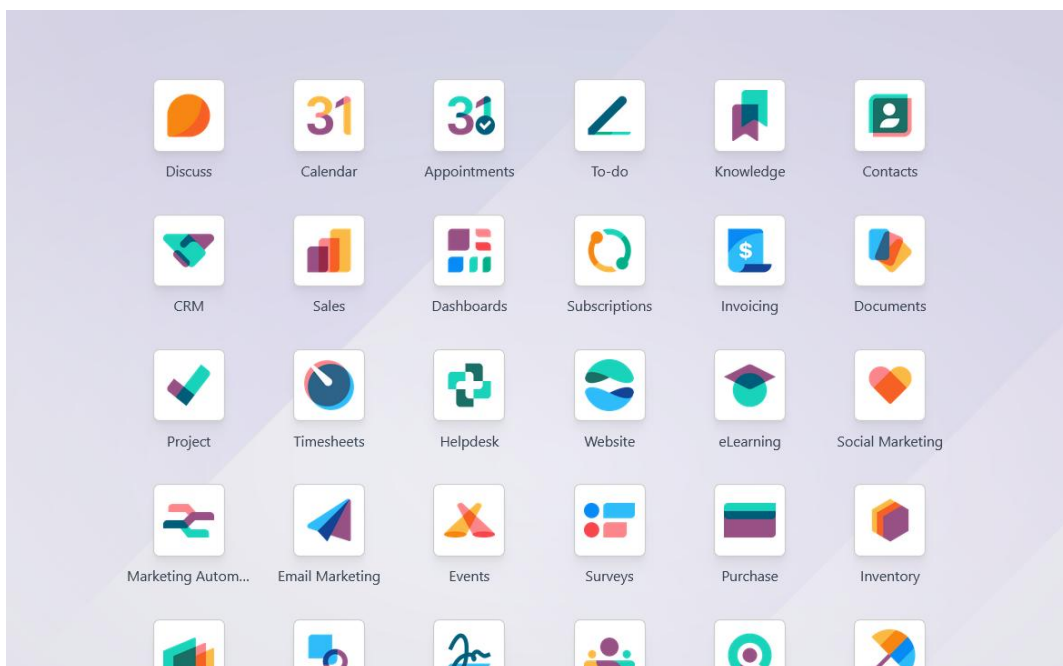
To access any APP, click on the icon. You may also type the APP's name directly from the main dashboard to find it or its related setup options.
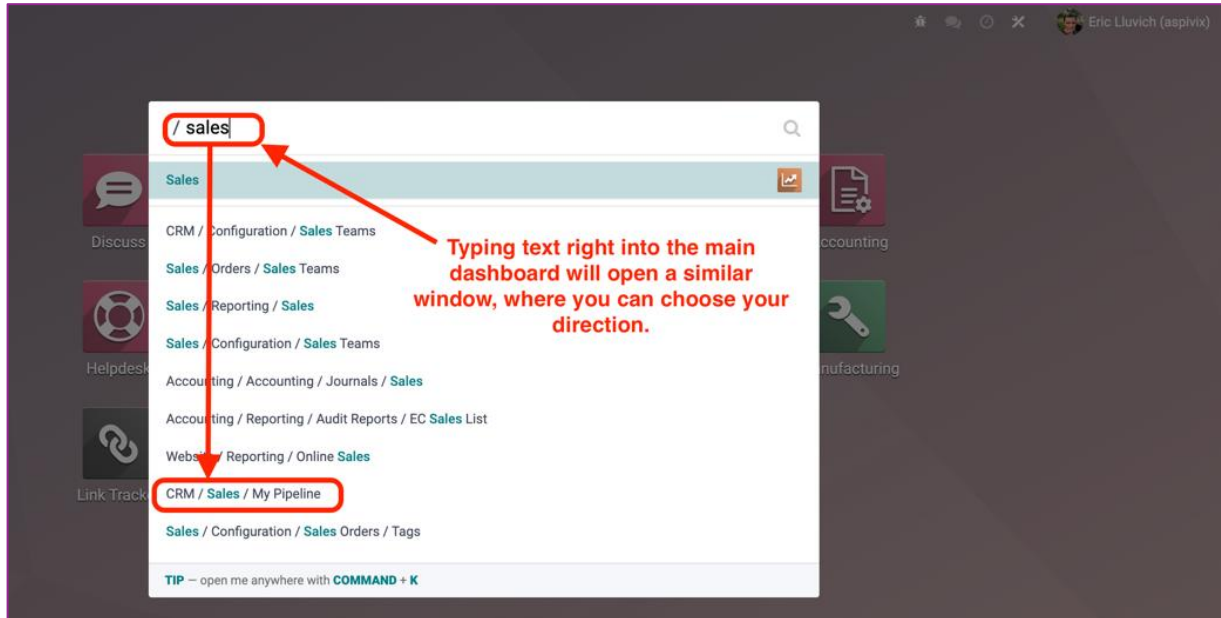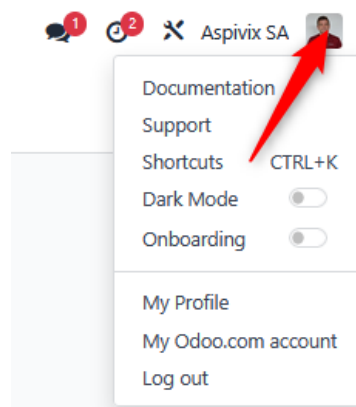

Once in an APP, you can return to the main dashboard by clicking on the top left corner.
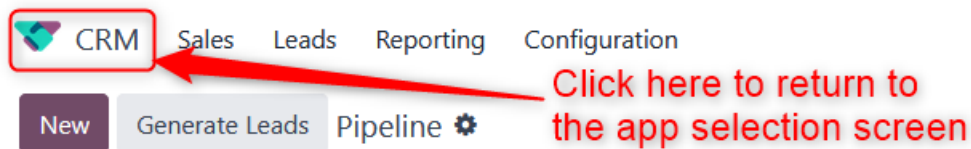
2   My Account

Click on your name in the top right corner to open your Odoo account menu. This enables you to access different resources and setup possibilities listed below.

2.1 DOCUMENTATION

This will bring you to Odoo User Docs, a set of documentation and user instructions providing guidelines for operating Odoo, created by Odoo.

2.2 SUPPORT

The support function will bring you to the Odoo ticketing system. If you witness a bug in Odoo's behavior, you can log a ticket and fill in the required information. Adding screenshots or a video may be helpful.

⚠️This form is **ONLY** to submit tickets for an identified **BUG** or abnormal behavior. Do not log a ticket for a request of enhancement or a design change.
Please contact the ASPIVIX internal Odoo SuperUser to validate that the issue you are witnessing concerns a proper bug and is not connected to a setup problem.

2.3 SHORTCUTS

List of commonly used Odoo shortcuts.

2.4 MY PROFILE

Within this personal preference menu, you can create your Odoo signature or add a picture to your profile. You can also select your time zone or notification preferences in this menu.
You can add a picture to your Odoo profile by clicking on the pencil on the picture frame.

A signature in Odoo will be used automatically when you send emails through Odoo.
To add a signature, type the text you want in the Email Signature field, this field is an html field which means that it accepts formatting. To access formatting options for this king of fields in Odoo, select the text you want to format, and a menu bar with formatting options will appear.

Below is the ASPIVIX standard signature to create in Odoo. For each portion of the signature (column Text in the table below), it shows the appropriate format to use (column Format in the table below).

Text	Format
First Name Last Name	Text type: Normal_Bold characters_Color: Black_Size: 13
Job Position	Text type: Normal_Bold characters_Color: click on text color, Solid, hex #870064_Size: 11
Company address	Text type: Normal_Color: click on text color, Solid, hex #870064_Size: 11

To finish the signature, add ASPIVIX Logo: type character "/" in the Email Signature box, scroll down and click on Image, and upload the picture from Google Drive: 08 - Marketing/02 - Functions/00. Brand/01 - Brand/3. Brand Elements/ASPIVIX Logo/Main Magenta/png.
Name of the file: ASPIVIX_main logo.png
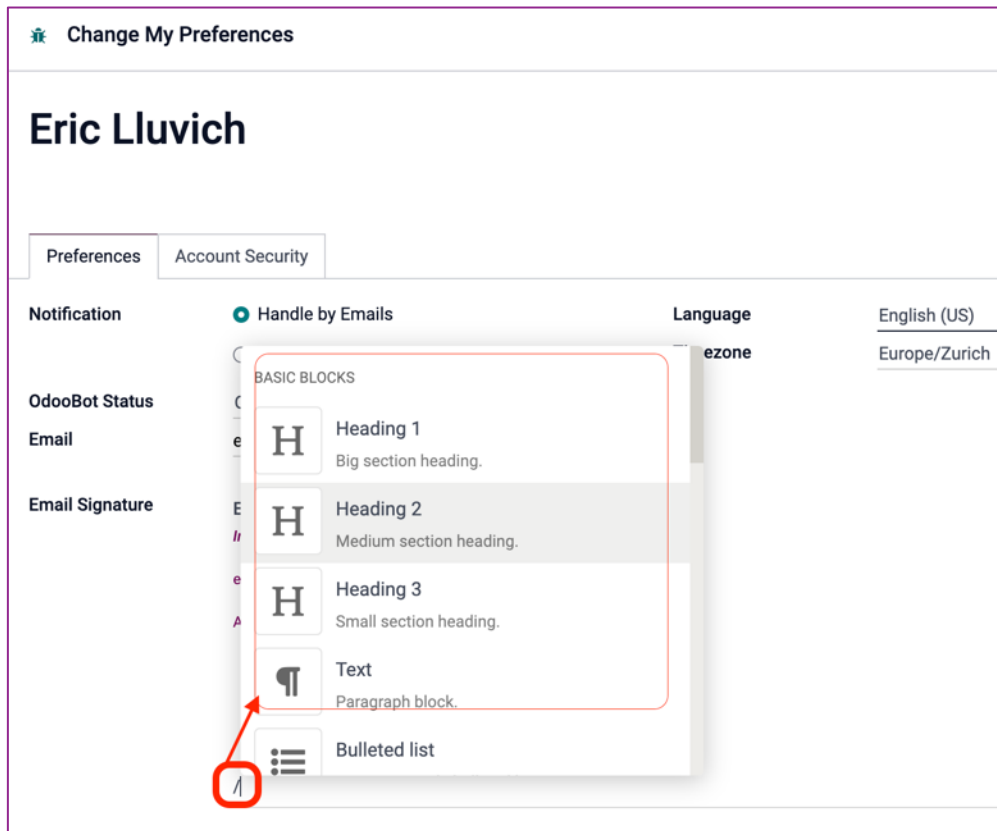
Picture size: 25% (click on the picture to open the menu and change the relative size).
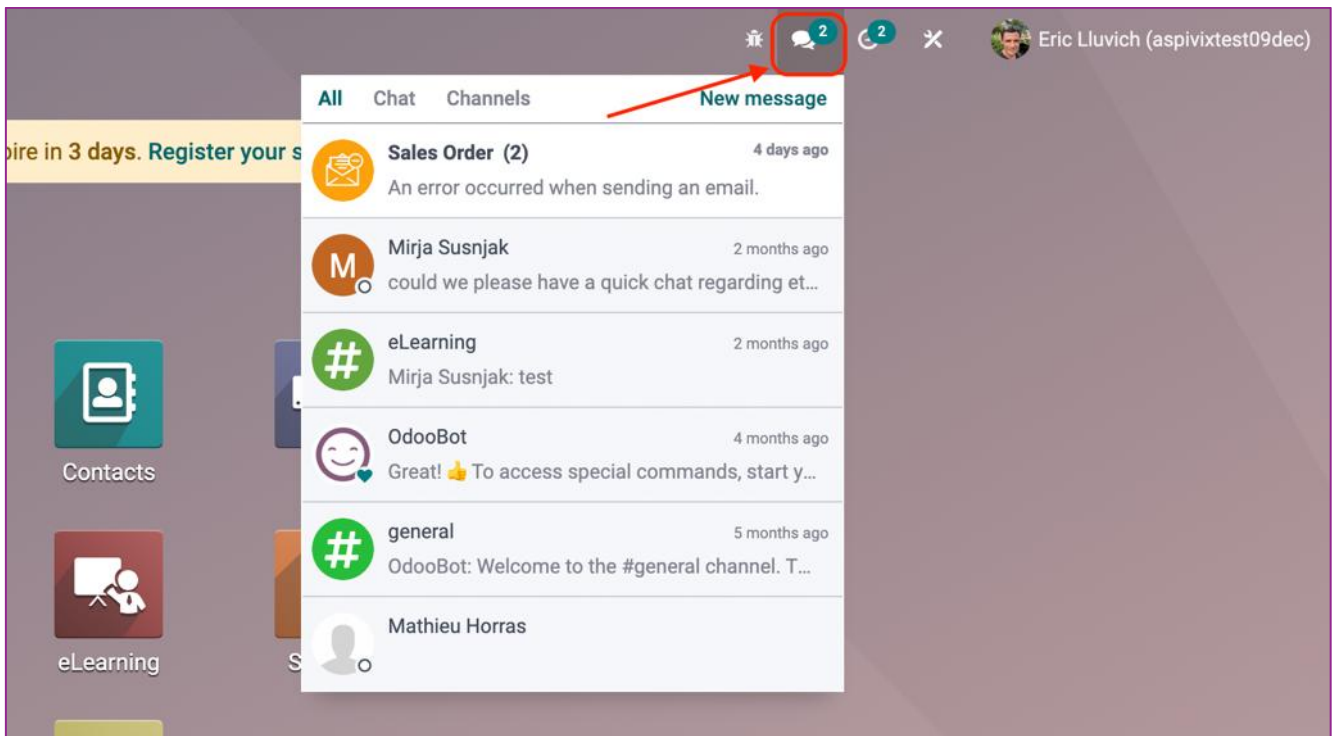
2.5 LOG OUT

Logging out of your Odoo account.

3 Notification icons

2 additional important icons are present in all windows in Odoo: the message and the activities icons.
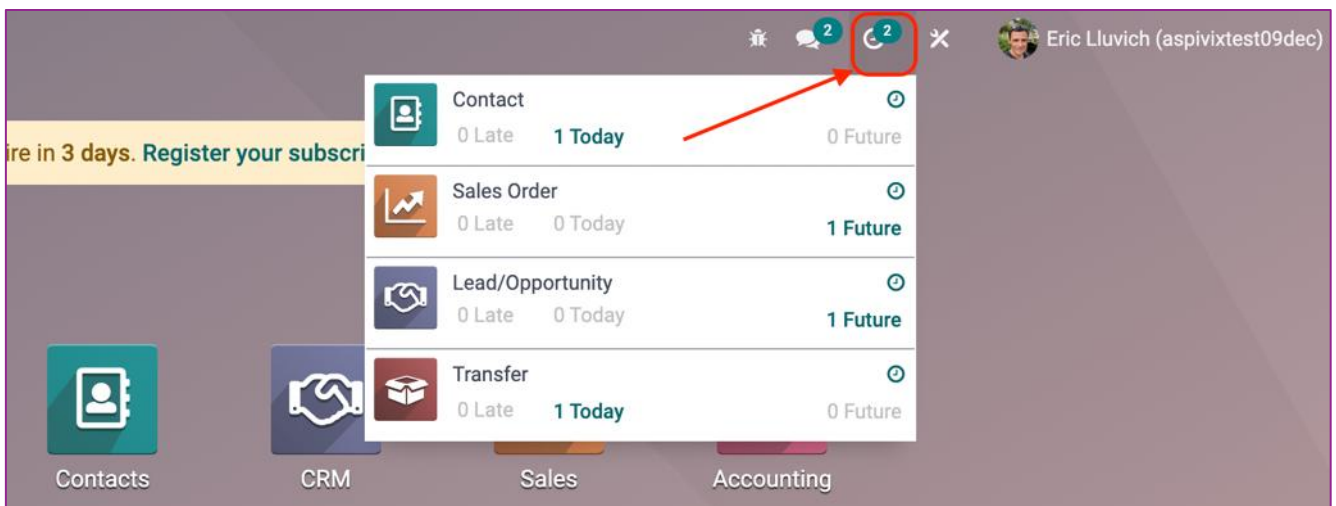
3.1 MESSAGE ICON

Offers an overview of messages received in Odoo and chat groups or channels.
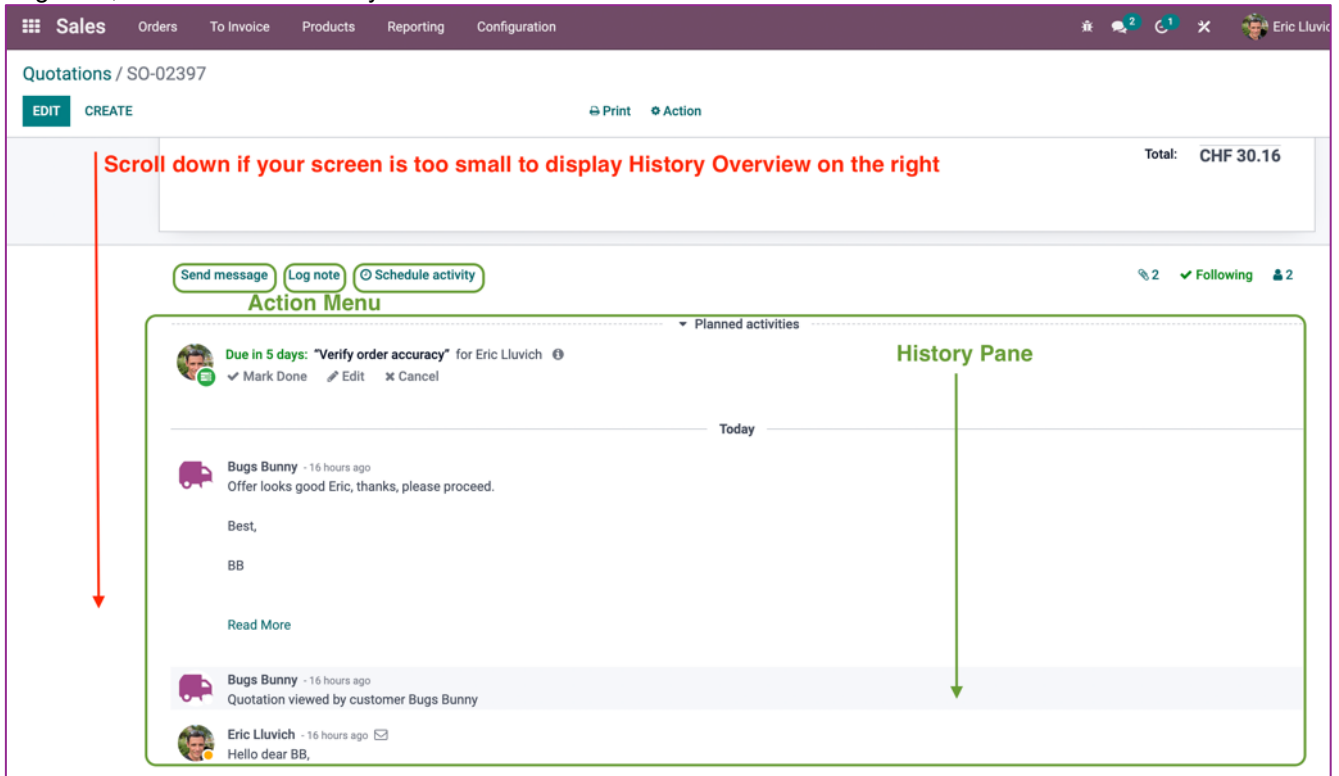
3.2 ACTIVITIES ICON

Displays all scheduled activities, either past due, current, or future dated. If you want to access one, simply click into it. How to schedule activities for yourself and others will be covered into the next chapter, HISTORY OVER-VIEW.

4 History overview (chatter)

The history overview, also called chatter, is an important feature in Odoo and can be found in most of the APPs at transaction level. It can be either on the right of your window if you have a large screen or at the bottom of the

window if your screen is smaller. It is composed of one history pane, as well as 3 action columns: Send message, Log note, and Schedule activity.
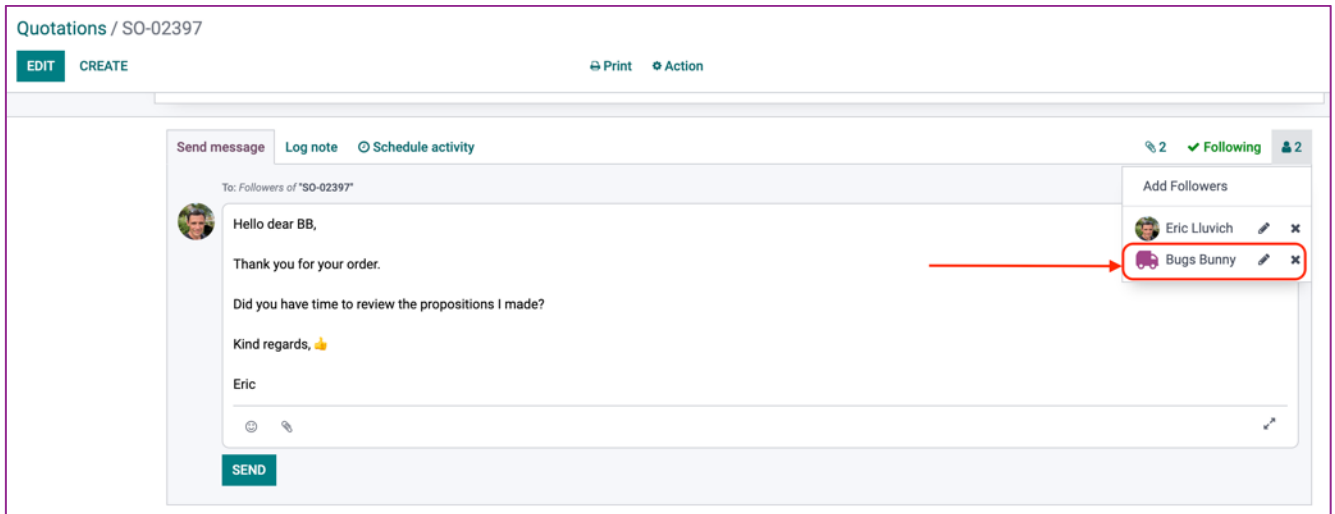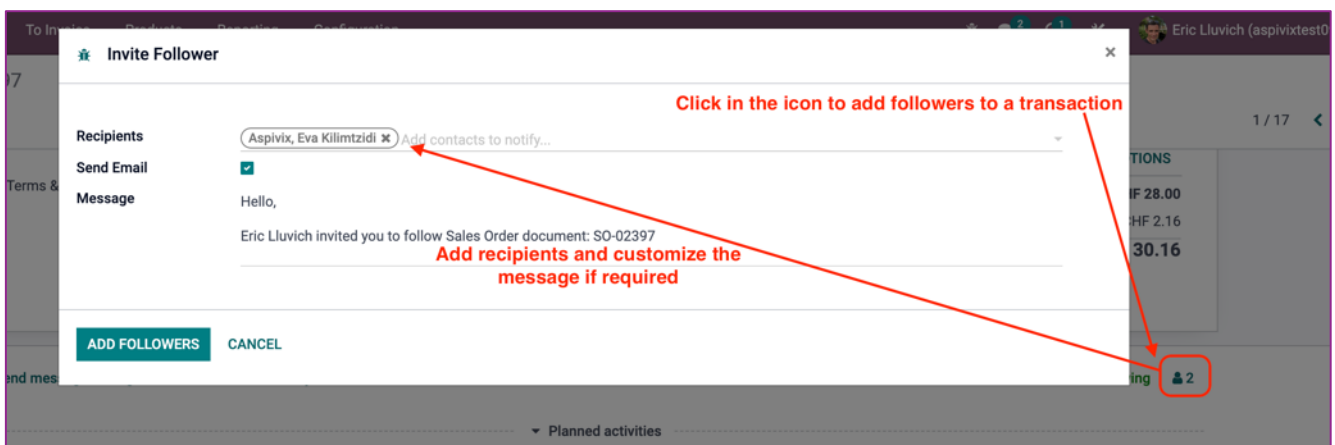

4.1 HISTORY PANE

The history pane regroups all discussions, actions and notes taken in relation to a specific order, a ticket, an inbound, an opportunity etc.

4.2 SEND MESSAGE

This action menu enables you to send a message directly from Odoo to a specific customer, or to the person(s) following a transaction. From the send menu, you can add files, emojis, and write your message in the window.

People following a transaction will be recipient when a message is sent from the menu. You can add or remove followers on a transaction by clicking on the person's icon on the right corner of the history pane.


Your signature, defined under PREFERENCE -> SIGNATURE, will appear on the customer's message.
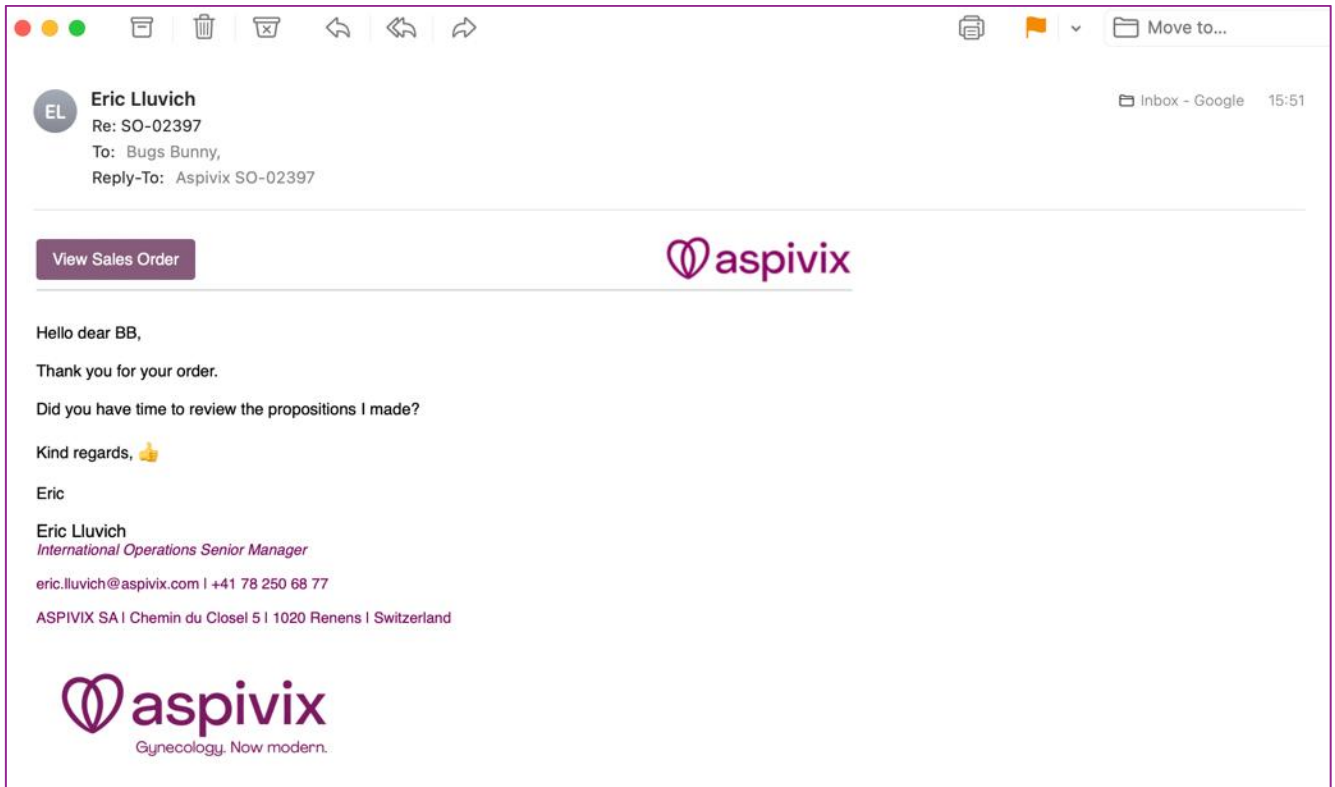
The customer can answer directly from his mailbox by clicking on Reply, which will log an answer in the history pane. This action from the customer will also notify the concerned Odoo user, given that the option "Manage notifications by e-mail" was selected in Preferences.

The history will then display the new e-mail the customer/follower received.
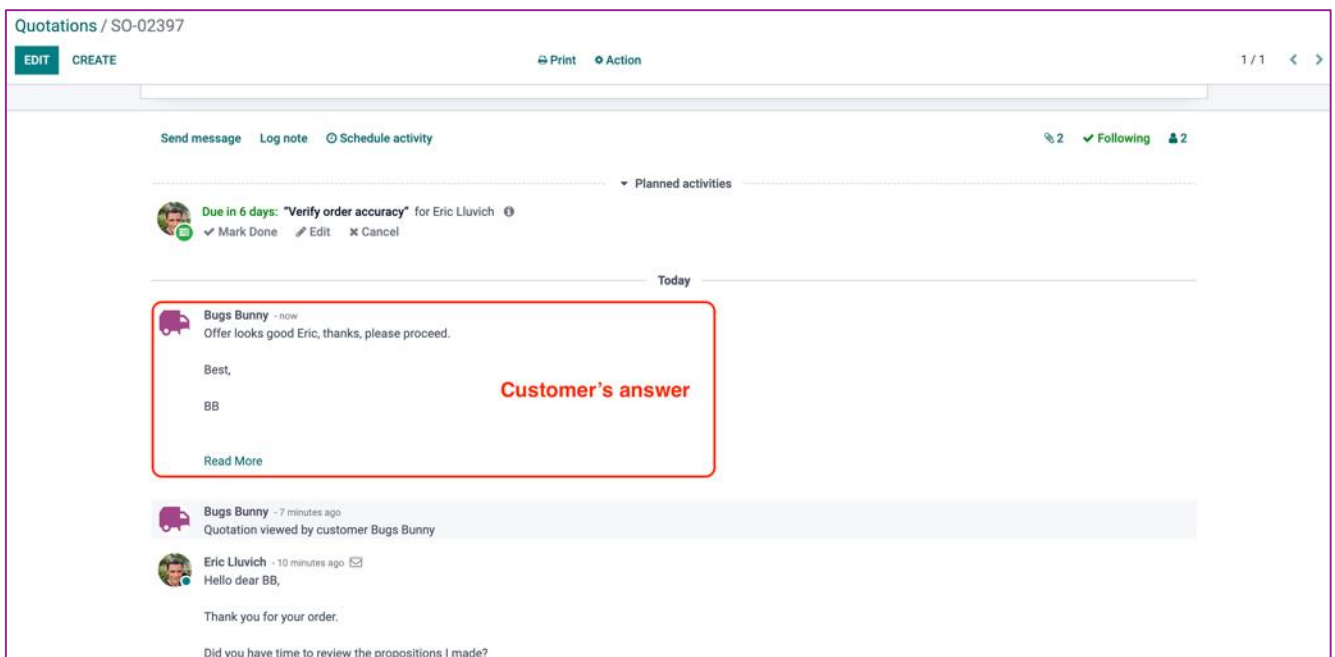
Customers can also answer by clicking on the link in the e-mail. They will thus access the MyASPIVIX portal, as shown below.
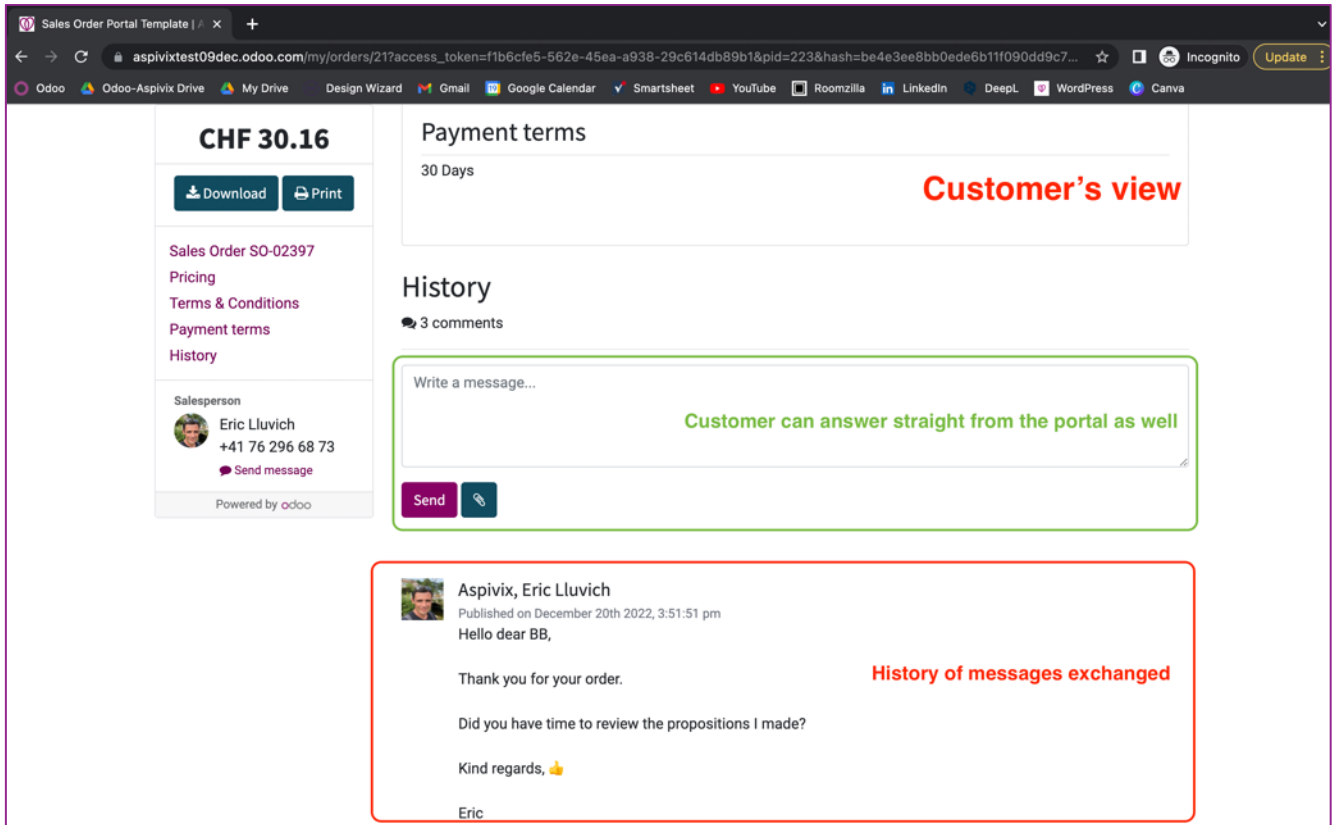
4.3 LOG NOTE

Internal notes can be logged for backup purposes, as reminders, for storing documents, or bringing other colleagues' attention toward a transaction. Notes can also contain attachments.

To bring a staff member's attention to an internal note: type the character "@" followed by the person's name, so they will receive a notification that their attention is required on a note. Given that the person you are tagging has selected "Manage notifications by e-mail" in Preferences, they will receive an e-mail with a link to the transaction.

4.4 SCHEDULE AN ACTIVITY

By scheduling an activity, you create a reminder for yourself or someone else that something needs to happen at a given time.

When clicking on this option, a new window opens. Choose the Activity Type, indicate a Summary, a Due Date, and an internal note if needed. By default, the activity will be assigned to you, though this can be changed to another Odoo user.

Scheduled activities will appear in the ADDITIONAL ICONS section under ACTIVITIES ICON.
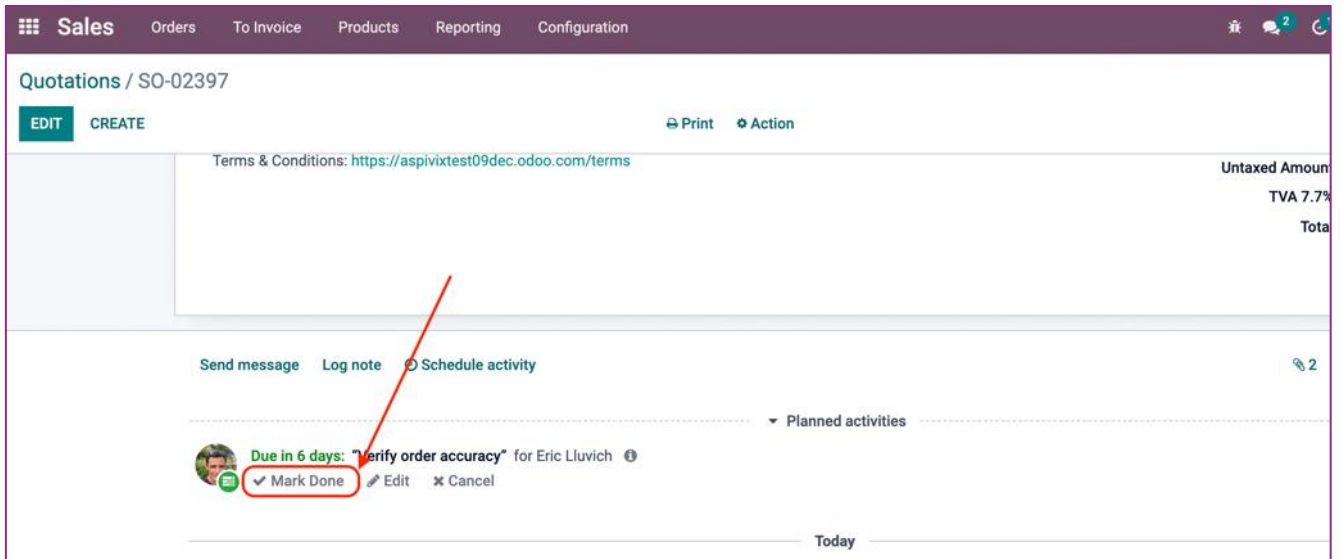
Activities can be marked as done either from the history pane of the specific transaction or by going through the Activities Icon.
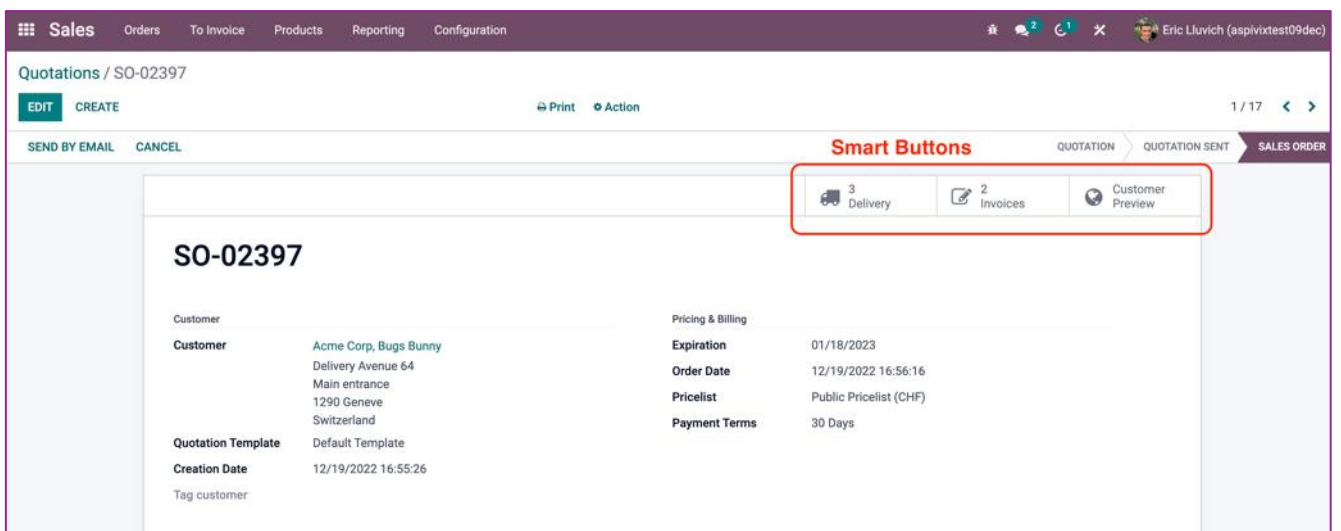
5 Smart buttons and links

Smart buttons and links help you to navigate quickly in Odoo toward linked transactions and windows.

5.1 SMART BUTTONS

Smart buttons appear on the top right corner of a transaction and can bring you directly to a linked transaction if you click within it.

5.2 ARIANE THREAD

The Ariane thread can be used to go back to a previous window when you have gone deeper into related elements of a transaction. It can be found in the top left corner.

6 REFERENCES

6.1 PROCEDURES, INSTRUCTIONS AND GUIDELINES

NA

6.2 TEMPLATES AND FORMS

NA

Certificate of Completion

INS-207-7-rev.B_ Account Setup & Basic Navigation.pdf

Printed on 2025-11-26 - 16:14:40 UTC

Document Details

Created by: Armand Polmard

Created on: 11/26/2025 11:57:36 (UTC)

Creation IP Address: 81.250.240.58

Signers: 3

Document ID: 782

Signature:
aaca2c975beab6f3abdec328f9991b0df21743130 ef15058f9aff8c71ff47317

Participants

Signatory	Email	Email Verification
Armand Polmard	armand.polmard@aspivix.com	☑
Signatory's hash:	289beb930acb7c7480ae73fe0b3e0aaf4a060a08efb7beba3e0f7cda445e5141	
Eva Kilimtzidi	eva.kilimtzidi@aspivix.com	☑
Signatory's hash:	3f97903ae565a14bf4e557f31bdd2ec328d3445986c10e6a735937942aa50b68	
Mauro Rinaldi	mauro.rinaldi@aspivix.com	☑
Signatory's hash:	78638443ccaea43979b1606b4de42a2f233d7b2ddc5d3d6ea75d60850cc12138	

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

Signing Events

Action	By	Date (UTC)	Geolocation	IP

Action	By	Date (UTC)	Geolocation	IP
Creation	Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:57:36	48.8558000, 2.3494000 🌐 View	81.250.240.58
Signature:		aaca2c975beab6f3abdec328f9991b0df21743130ef15058f9aff8c71ff47317		
Signature _Armand Polmard_	Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:57:41	48.8558000, 2.3494000 🌐 View	81.250.240.58
Signature:		e75ed75c6cd5c0bb4e6066ecb4182b310b693cf3818ca28ca34773b63ab3848a		
Signature	Aspivix SA, Eva Kilimtzidi eva.kilimtzidi@aspivix.com	11/26/2025 12:05:21	46.4884000, 6.6557000 🌐 View	178.192.218.57
Signature:		1ef120dd53af6067905ef2bffa116546cdd5da665f95d460e8af4e2657196eae		
Signature	Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:26:07	47.3934000, 8.5163000 🌐 View	213.55.186.206
Signature:		66110afda25f2706e5d87cc99748efd66a76eaaedff7078e271fee305f7316d0		

✔ The document's integrity is valid.

The final document and this completion history have been sent by email on 11/26/2025 to: mauro.rinaldi@aspivix.com, eva.kilimtzidi@aspivix.com, armand.polmard@aspivix.com.

Access Logs

Viewed/downloaded by	Date (UTC)	State	Geolocation	ip

Viewed/downloaded by	Date (UTC)	State	Geolocation	ip
Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:57:37	Before Signature	48.8558000, 2.3494000 🌐 View	81.250.240.58
Aspivix SA, Eva Kilimtzidi eva.kilimtzidi@aspivix.com	11/26/2025 12:05:18	Before Signature	46.4884000, 6.6557000 🌐 View	178.192.218.57
Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:25:52	Before Signature	47.3934000, 8.5163000 🌐 View	213.55.186.206
Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:26:03	Before Signature	47.3934000, 8.5163000 🌐 View	213.55.186.206
Armand Polmard armand.polmard@aspivix.com	11/26/2025 16:14:39	After Signature	48.8558000, 2.3494000 🌐 View	81.250.240.58