

APPROVAL

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PURPOSE

This procedure describes how ASPIVIX creates and manages customer accounts and the associated information.

SCOPE

The scope of this procedure includes the creation and maintenance of contacts in ASPIVIX ERP system.

RESPONSIBILITIES

The INT OPS is responsible for establishing, implementing, and maintaining this SOP. Any person creating a customer or a contact in the ASPIVIX ERP system must respect and apply this guide.

DOCUMENT HISTORY

Description of Changes	Version
Initial version	A
Added section 1.2.3 about altitude verification for products with altitude limit requirements.	B
CRC-2509-13 – Screenshots and process updated across the document due to Odoo migration to version 18, implementing new application layouts.	C

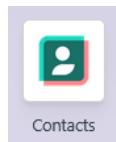
TABLE OF CONTENTS

1. INSTRUCTION DESCRIPTION	2
1.1. LOOKING FOR DUPLICATES	2
1.2. CUSTOMER CREATION	3
1.2.1. CREATION OPTIONS	3
1.2.2. CUSTOMER CREATION	4
1.2.3. ALTITUDE VERIFICATION	5
1.2.4. CONTACTS & SPECIFIC ADDRESSES CREATION	5
1.2.5. PRICE LISTS	6
1.2.6. INTERNAL NOTES	7
1.3. GRANTING MYASPIVIX PORTAL ACCESS	7
1.4. MANAGING TAGS	9
2. REFERENCES	10
2.1. PROCEDURES, INSTRUCTIONS AND GUIDELINES	10
2.2. TEMPLATES AND FORMS	10

1. INSTRUCTION DESCRIPTION

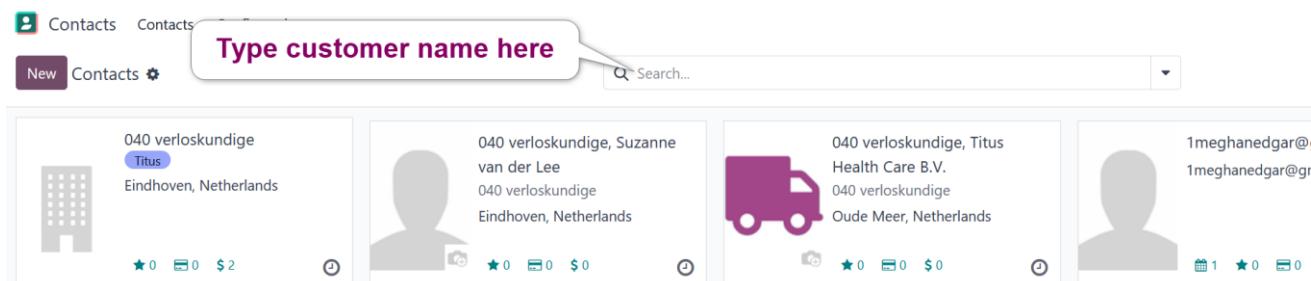
1.1. LOOKING FOR DUPLICATES

First, to enter the Contacts APP, click on the related APP from Odoo's main dashboard.

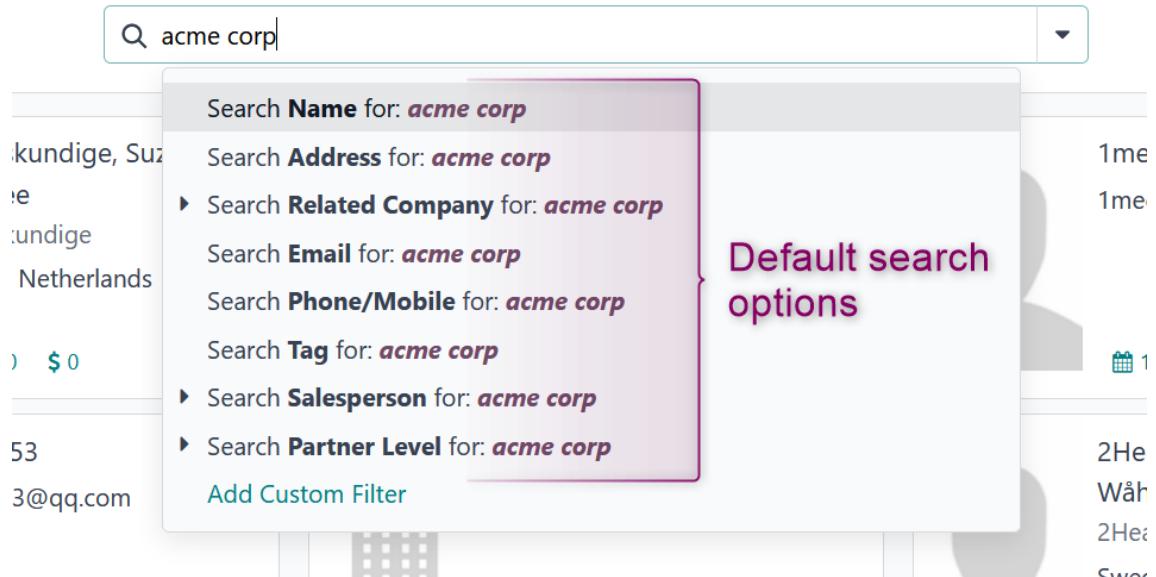


Before creating a new customer, you must **ensure that this customer does not exist already**. This will avoid creating duplicate customer accounts and maintain **Customer Master Data quality**.

For this purpose, use the “Search” bar within the Contact APP:



Default search options are displayed as below, for example for a new customer called “Acme Corp”:



- ▲ Make sure you have searched with their e-mail address, as a customer could have contacted Aspivix with an e-mail, but an account might not have been maintained!
- ▲ Two persons sharing an email address must also share their contact and activity in Odoo

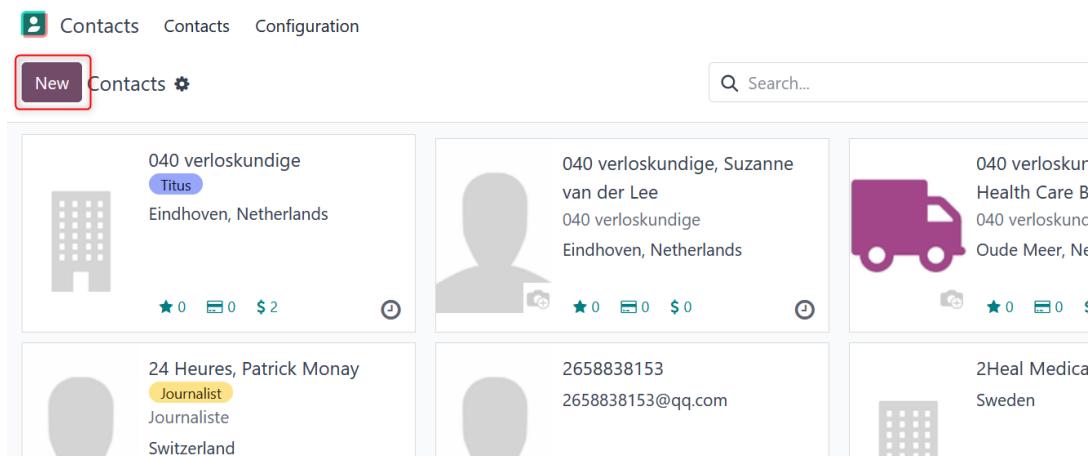
If you are not finding any duplicate/similar customer accounts, you can create a new customer.

1.2. CUSTOMER CREATION

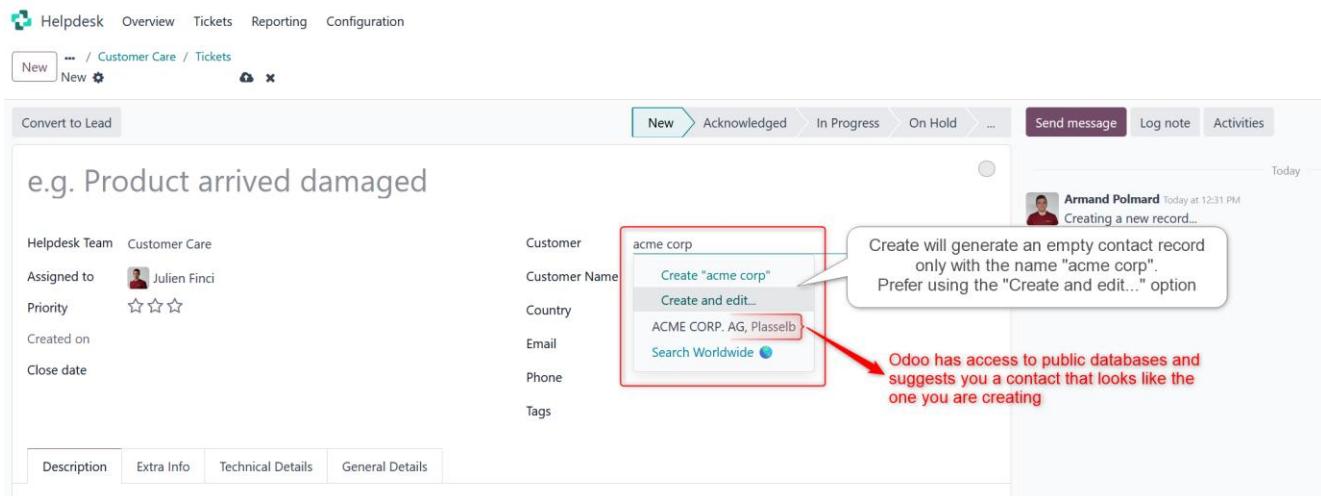
1.2.1. Creation options

You can create a new customer from different windows.

First, from the Contact APP:



You can also create a customer from any field prompting you to indicate a customer name. This includes a number of APPs, such as Helpdesk, CRM, or Sales.



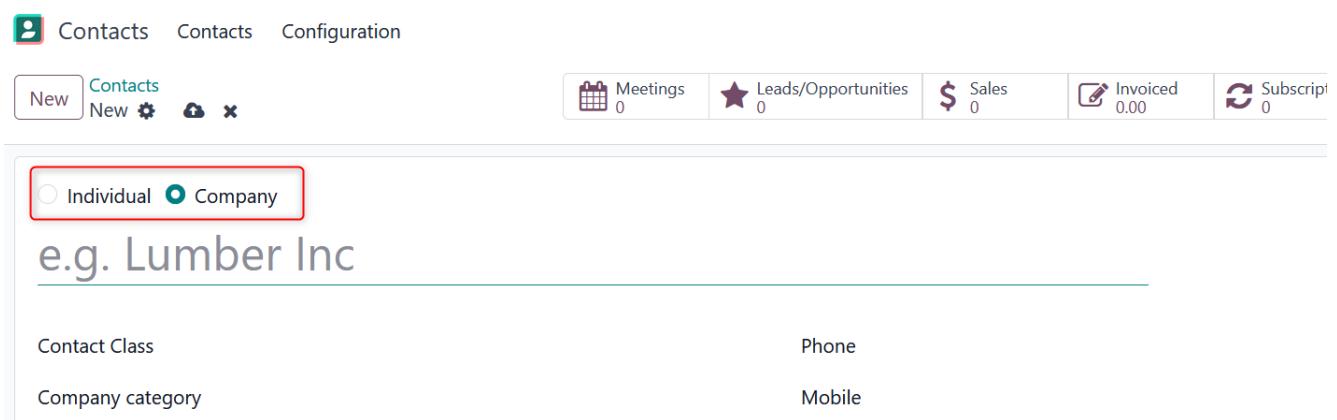
The screenshot shows the Odoo Helpdesk interface. In the center, there is a search bar with the text "acme corp". A tooltip appears over the search results, stating: "Create will generate an empty contact record only with the name "acme corp". Prefer using the "Create and edit..." option". Another red arrow points to the "Search Worldwide" button, with the text "Odoo has access to public databases and suggests you a contact that looks like the one you are creating".

1.2.2. Customer creation

⚠ A person may have several contacts (private identity and/or several jobs), also several contacts may belong to the same company as colleagues or independent services. In such cases, you might want to create a company contact gathering their information.

For this purpose, refer to the section “Contacts & Specific Addresses Creation”.

1. Select Company (or individual in case of a person not affiliated to a company) above the name.



The screenshot shows the Odoo Contacts interface. At the top, there is a radio button for "Individual" and another for "Company", with "Company" being selected. Below this, there is a search bar with the text "e.g. Lumber Inc". The contact details section includes fields for "Contact Class" and "Company category".

2. Enter the name of the customer.
3. Fill in the class and category if you have these information.
4. Insert the address of the main office, if available.
5. Add phone number, generic e-mail address, and website, if any.

1.2.3. Altitude verification

The product functionality (e.g., Carevix™) is influenced by changes in the atmospheric pressure, particularly at different altitudes. When assessing the product's suitability for use in different locations, it is important to consider altitude variations as per product labeling. Therefore, while creating or reviewing a customer, Odoo users should verify the customer's location altitude and compare it with the product's intended altitude range, which is below 1500m.

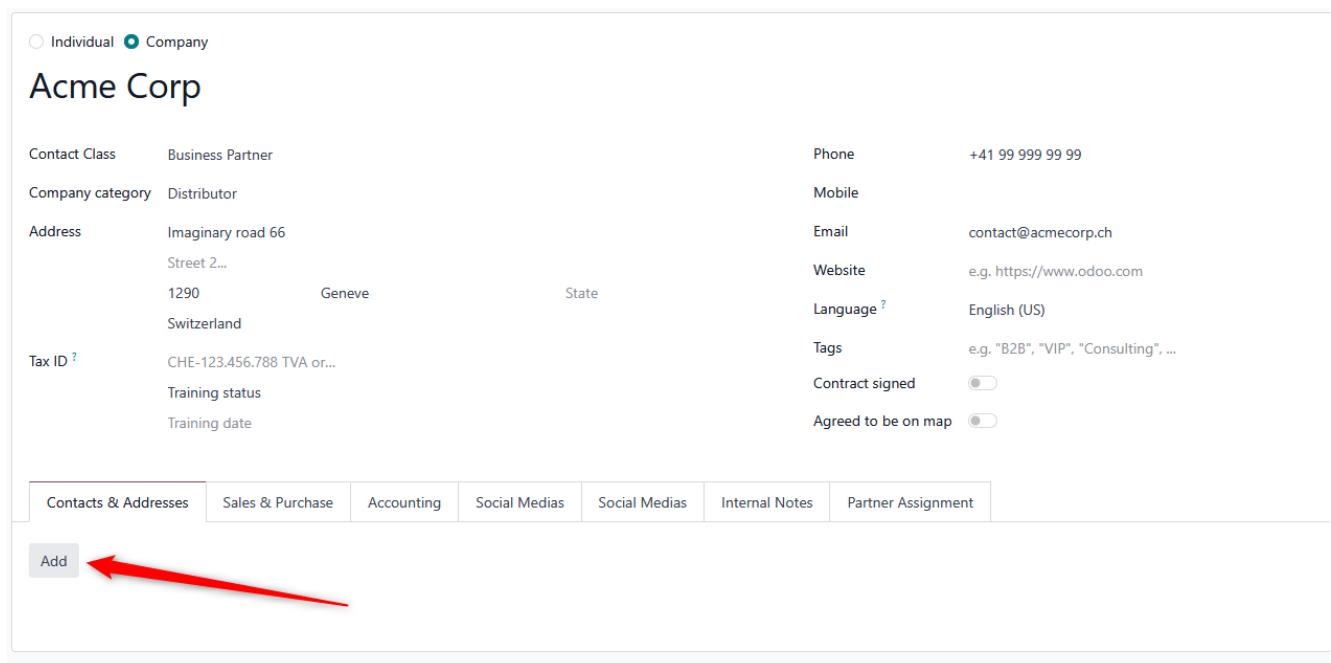
- If the customer's location falls within the recommended altitude range for optimal product performance (e.g., below 1500m for Carevix™), proceed to the next steps.
- If the customer's location exceeds the recommended altitude range, inform the customer of potential performance issues associated with higher altitudes.

1.2.4. Contacts & specific addresses creation

When you have created a customer as a company, **you can either add contacts affiliated to this company, or separate bill-to or ship-to addresses.**

For this purpose, go into the edit mode by clicking the button in the top left corner.

Click into Add in the bottom window Contacts & Addresses



○ Individual ● Company

Acme Corp

Contact Class	Business Partner	Phone	+41 99 999 99 99
Company category	Distributor	Mobile	
Address	Imaginary road 66 Street 2... 1290 Geneve Switzerland	Email	contact@acmecorp.ch
Tax ID [?]	CHE-123.456.788 TVA or...	Website	e.g. https://www.odoo.com
Training status	Geneve	Language [?]	English (US)
Training date	State	Tags	e.g. "B2B", "VIP", "Consulting", ...
		Contract signed	<input type="checkbox"/>
		Agreed to be on map	<input type="checkbox"/>

Contacts & Addresses Sales & Purchase Accounting Social Medias Social Medias Internal Notes Partner Assignment

In the new window:

1. Select the type of contact or address you want to create.
2. Fill-in available information.
3. Save & Close or Save & New to finish.

Create Contact

X

 Contact Invoice Address Delivery Address Follow-up Address Other Address

Preferred address for all deliveries. Selected by default when you deliver an order that belongs to this company.

Contact Name	Bugs Bunny			Email	bugs bunny@acmecorp.ch
Address	Delivery Avenue 64			Phone	
	Street 2...			Mobile	
	1290	Geneve	State		
					Switzerland

Internal notes...

[Save & Close](#) [Save & New](#) [Discard](#)

Result of the contact and address creation could be as follow:

Individual Company

Advanced Global Health Ltd Main company information

Contact Class	Business Partner	Phone			
Company category	Distributor	Mobile			
Address	G03, 30 Great Guildford Street	Email	michael.mather@aghealth.co.uk		
	Street 2...	Website	e.g. https://www.odoo.com		
	SE1 0HS	London	Language <small>?</small>	English (US)	
	United Kingdom			Tags	Distributor
Tax ID <small>?</small>	GB123456782 or XI1234...			Contract signed	<input type="checkbox"/>
Training status				Agreed to be on map	<input type="checkbox"/>
Training date					

[Contacts & Addresses](#) [Sales & Purchase](#) [Accounting](#) [Social Medias](#) [Social Medias](#) [Internal Notes](#) [Partner Assignment](#)

Add Company's specific contacts and addresses

 Adam Wragg Operation Manager adam.wragg@aghealth.co.uk	 Alex Fisher alex.fisher@aghealth.co.uk	 Hannah Hunt hannah.hunt@aghealth.co.uk Phone: +44 7580 438379	 Michael Mather Lead Product Manager michael.mather@aghealth.co.uk Mobile: +44 7869 656554
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1.2.5. Price lists

Price Lists are defaulted automatically in Odoo from the customer's country in the main address of their contact card.

If the customer is to benefit from special pricing (such as Bayer Price List, for example), you may go into the Sales & Purchase tab and click on the right of the field Price List to select the right one.

Acme Corp



Company type	Distributor	Phone	+41 99 999 99 99
Address	Imaginary road 66	Mobile	
	Block A3	Email	standard@acmecorp.ch
	Geneve State 1290	Website	http://www.acmecorp.ch
	Switzerland	Language	English (US) 
VAT	e.g. BE0477472701	Tags	Tags... 

Contacts & Addresses  Sales & Purchase Accounting Internal Notes

Sales

Salesperson

Sales Team

Payment Terms

Pricelist  

Delivery Method

Fiscal Information

Fiscal Position

Purchase

Payment Terms

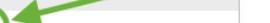
Reference

Website

Industry

SLA Policies

Public Pricelist (CHF)

Bayer Pricelist (CHF)  

UK Pricelist (GBP)

US Price List (USD)

EU Price List (EUR)

1.2.6. Internal notes

Internal notes can give additional information to the Sales, Marketing, or Ops teams. These notes will be visible to anyone accessing this customer sheet. For this purpose, navigate to the Internal Notes tab, and go into the edit mode.

Block A3	Email	standard@acmecorp.ch
Geneve 1290	Website	http://www.acmecorp.ch
Switzerland	Language	English (US) 
VAT	Tags	

Contacts & Addresses  Sales & Purchase Accounting Internal Notes

Customer met during GentleGyn congress. This customer is a merger from company ABC when they were acquired by BCD

Very interested by carevix, they would be eager to present our device in their Sales Meeting and social medias.

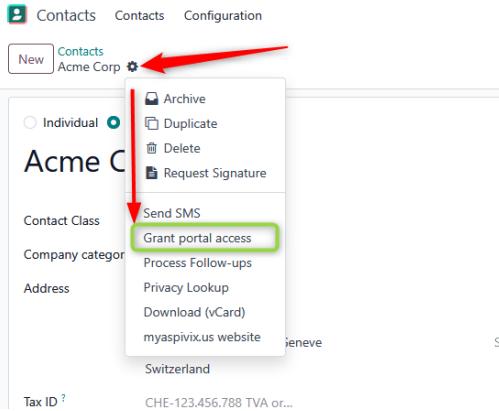
Warning on the Sales Order

No Message

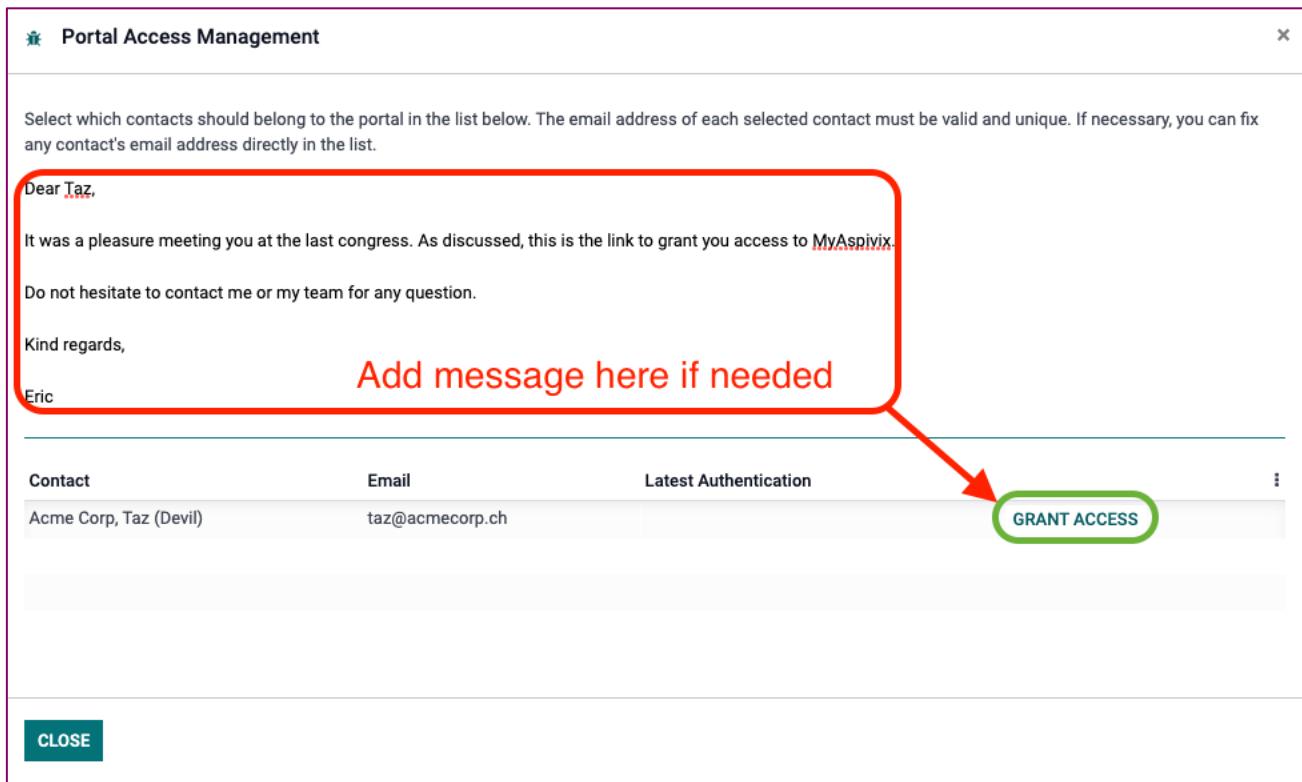
1.3. Granting MyAspivix portal access

To grant a MyAspivix access to a contact, go to the specific contact or company, navigate to the contact card, or line, and click to open it.

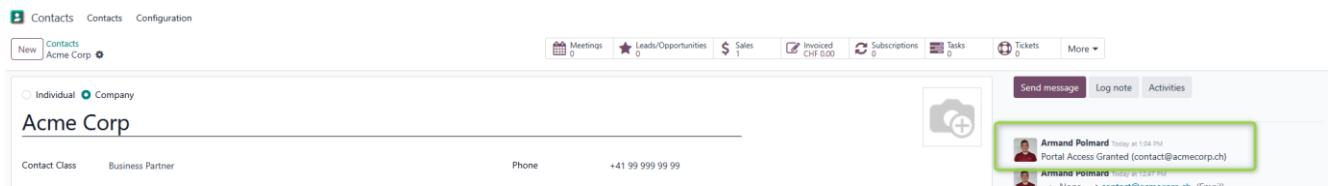
Once the contact is opened, click into “Action”, and “Grant portal access”.



You can add a personal message to the access e-mail, though it is not mandatory. The access e-mail does contain generic text already. Click on Grant Access.

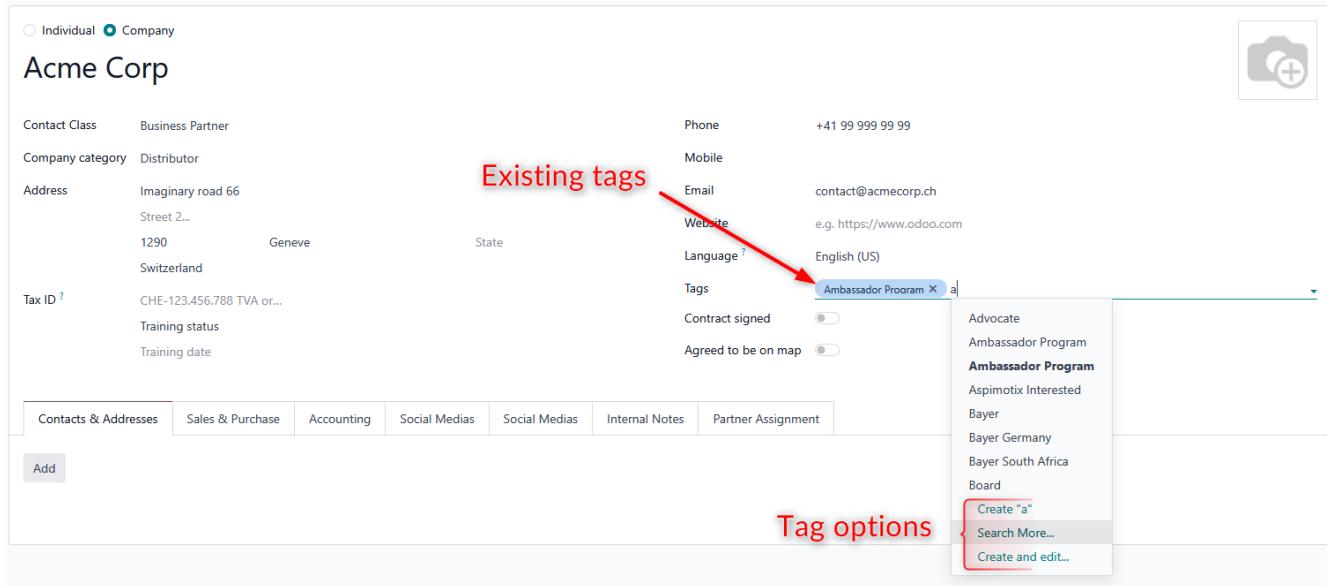


The access e-mail is now listed into the History Column.



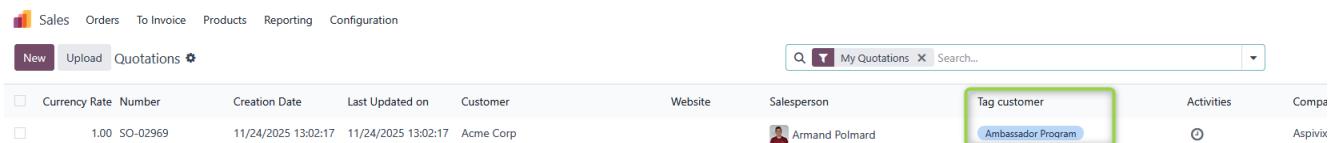
1.4. Managing tags

Tags can be used to identify rapidly specific customers, such as the ones participating to the Ambassador Program. Other examples could be using tags to flag customers who do not pay on time, thus requiring additional caution before processing their Purchase Orders.



The screenshot shows the Odoo Customer Record interface for 'Acme Corp'. The 'Tags' field is highlighted with a red arrow and contains 'Ambassador Program'. A dropdown menu is open, showing 'Ambassador Program' as the selected tag. Other options in the menu include 'Advocate', 'Aspimotix Interested', 'Bayer', 'Bayer Germany', 'Bayer South Africa', 'Board', 'Create "a"', 'Search More...', and 'Create and edit...'. The 'Tag options' label is overlaid on the dropdown menu.

Tags will be visible on the Sales Order level and can be searched specifically using Filters.



The screenshot shows the Odoo Sales Quotations interface. A search bar at the top right contains 'My Quotations'. A 'Tag customer' button is highlighted with a green box and contains 'Ambassador Program'. Other buttons in the row include 'Activities' and 'Compa'.

2. REFERENCES

2.1. Procedures, instructions and guidelines

NA

2.2. Templates and Forms

NA

Certificate of Completion

INS-207-8-rev.C_ Customer Creation & Maintenance.pdf

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Signers: 3 **0a9d18797c05f3126c6d06**

Participants

Signatory	Email	Email Verification
Armand Polmard	armand.polmard@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	289beb930acb7c7480ae73fe0b3e0aaf4a060a08efb7beba3e0f7cda445e5141	
Eva Kilimtzidi	eva.kilimtzidi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	3f97903ae565a14bf4e557f31bdd2ec328d3445986c10e6a735937942aa50b68	
Mauro Rinaldi	mauro.rinaldi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	78638443ccaea43979b1606b4de42a2f233d7b2ddc5d3d6ea75d60850cc12138	

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contact@aspivix.com | <https://aspivix.com>

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