




APPROVAL

Role	Name	Function	Signature
Author	Armand Polmard	ITS	
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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

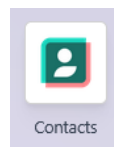
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1. INSTRUCTION DESCRIPTION

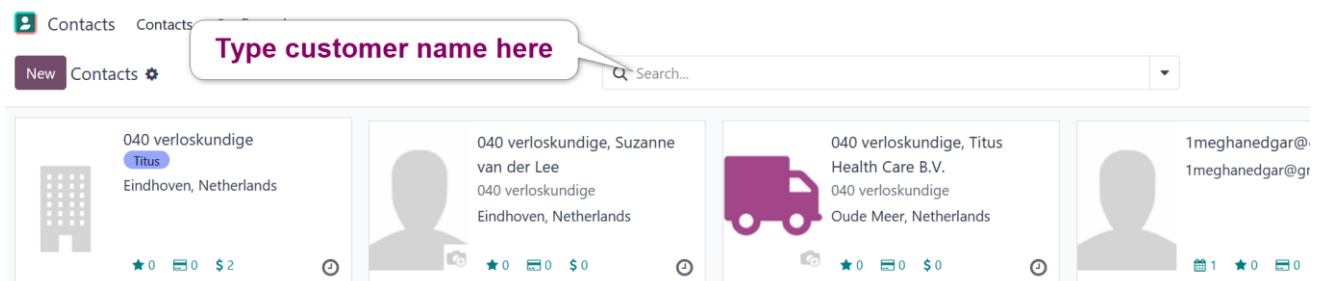
1.1. LOOKING FOR DUPLICATES

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

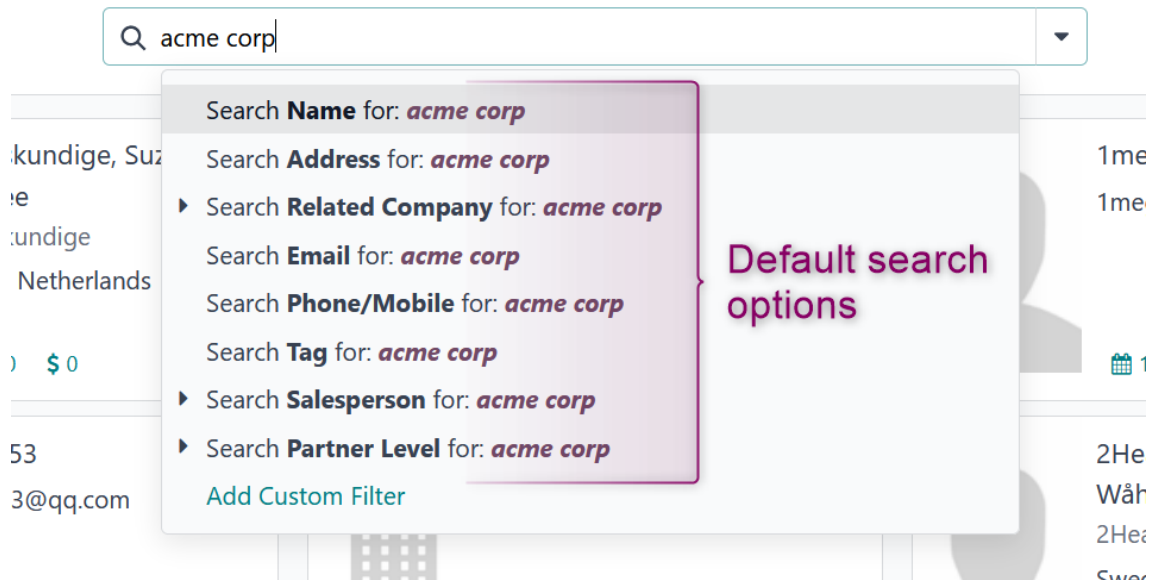


Before creating a new customer, you must **ensure that this customer does not exist already**. This will avoid creating duplicate customer accounts and maintain **Customer Master Data quality**.

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":



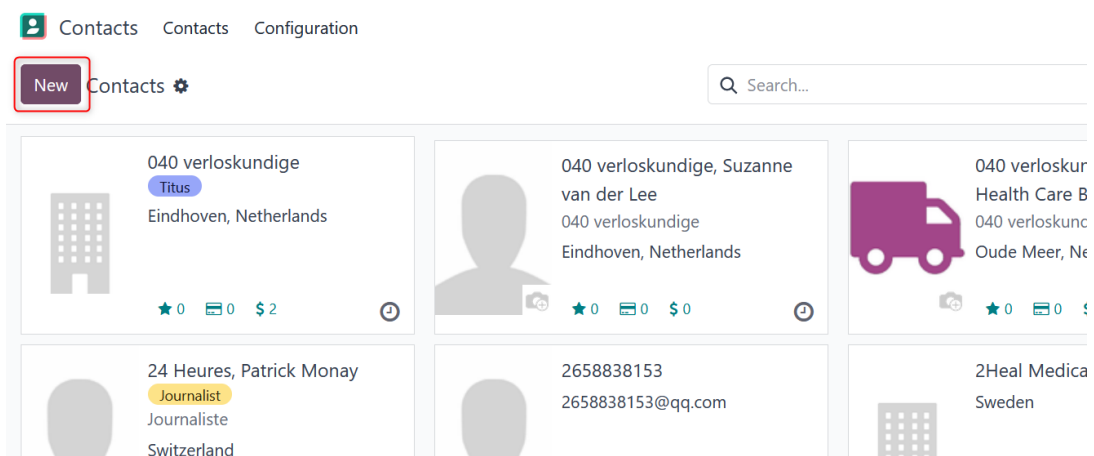
- ▲ Make sure you have searched with their e-mail address, as a customer could have contacted Aspivix with an e-mail, but an account might not have been maintained!
- ▲ Two persons sharing an email address must also share their contact and activity in Odoo

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

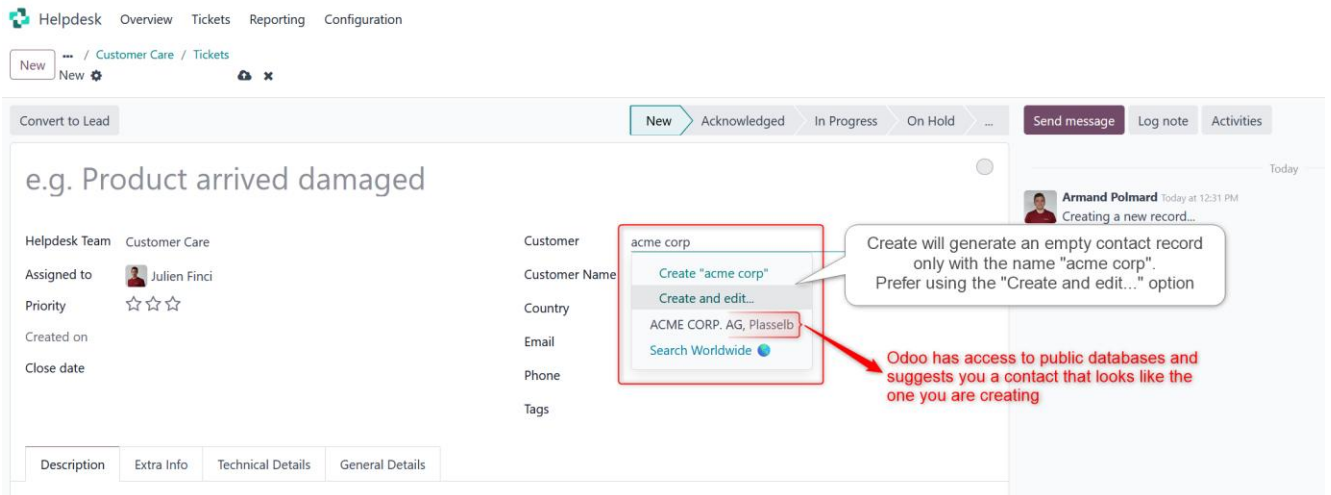
1.2. CUSTOMER CREATION

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.

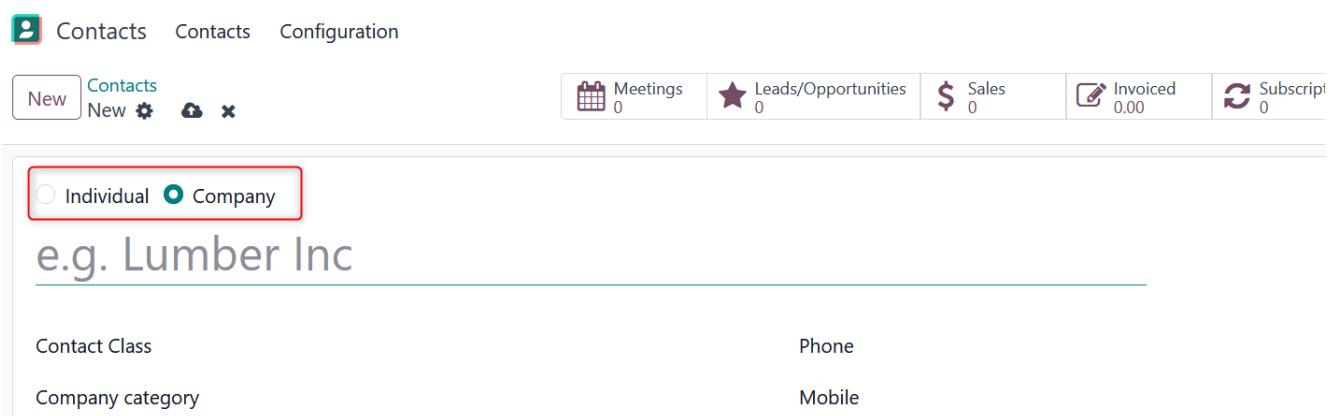


1.2.2. Customer creation

- ▲ 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.



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	Email	contact@acmecorp.ch
	Street 2...	Website	e.g. https://www.odoo.com
	1290 Geneve State	Language ?	English (US)
	Switzerland	Tags	e.g. "B2B", "VIP", "Consulting", ...
Tax ID ?	CHE-123.456.788 TVA or...	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

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



☐ 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 bugsbunny@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

Contact Class Business Partner
 Company category Distributor
 Address G03, 30 Great Guildford Street
 Street 2... SE1 0HS London State
 United Kingdom
 Tax ID ? GB123456782 or XI1234...
 Training status
 Training date

Phone
 Mobile
 Email michael.mather@aghealth.co.uk
 Website e.g. https://www.odoo.com
 Language ? English (US)
 Tags Distributor X
 Contract signed
 Agreed to be on map

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

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

Address

Imaginary road 66

Block A3

Geneve 1290

Switzerland

VAT

e.g. BE0477472701

Phone

+41 99 999 99 99

Mobile

Email

standard@acmecorp.ch

Website

http://www.acmecorp.ch

Language

English (US)

Tags

Tags...

Contacts & Addresses

Sales & Purchase

Accounting

Internal Notes

Sales

Salesperson

Sales Team

Payment Terms

Pricelist

Public Pricelist (CHF)

Delivery Method

Public Pricelist (CHF)

Fiscal Information

Fiscal Position

Purchase

Payment Terms

Misc

Reference

Website

Industry

SLA Policies

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

Geneve 1290

Switzerland

VAT

Email

standard@acmecorp.ch

Website

http://www.acmecorp.ch

Language

English (US)

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.

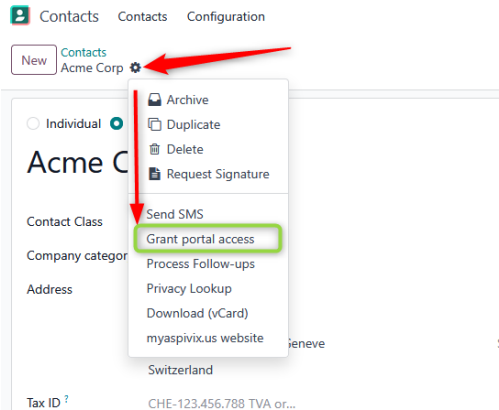
Warning on the Sales Order

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.


Portal Access Management
✕

Select which contacts should belong to the portal in the list below. The email address of each selected contact must be valid and unique. If necessary, you can fix any contact's email address directly in the list.

Dear Taz,

It was a pleasure meeting you at the last congress. As discussed, this is the link to grant you access to MyAspivix.

Do not hesitate to contact me or my team for any question.

Kind regards,

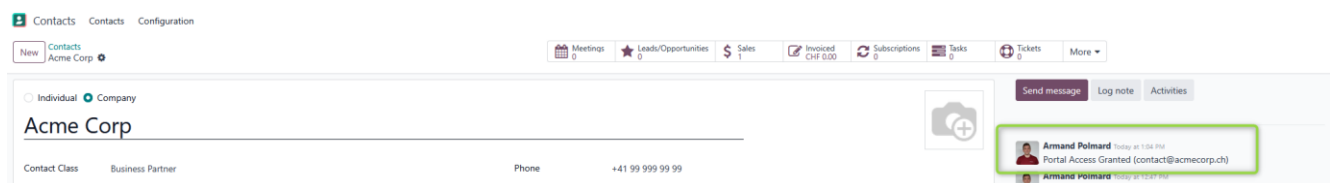
Eric

Add message here if needed

Contact	Email	Latest Authentication	
Acme Corp, Taz (Devil)	taz@acmecorp.ch		GRANT ACCESS

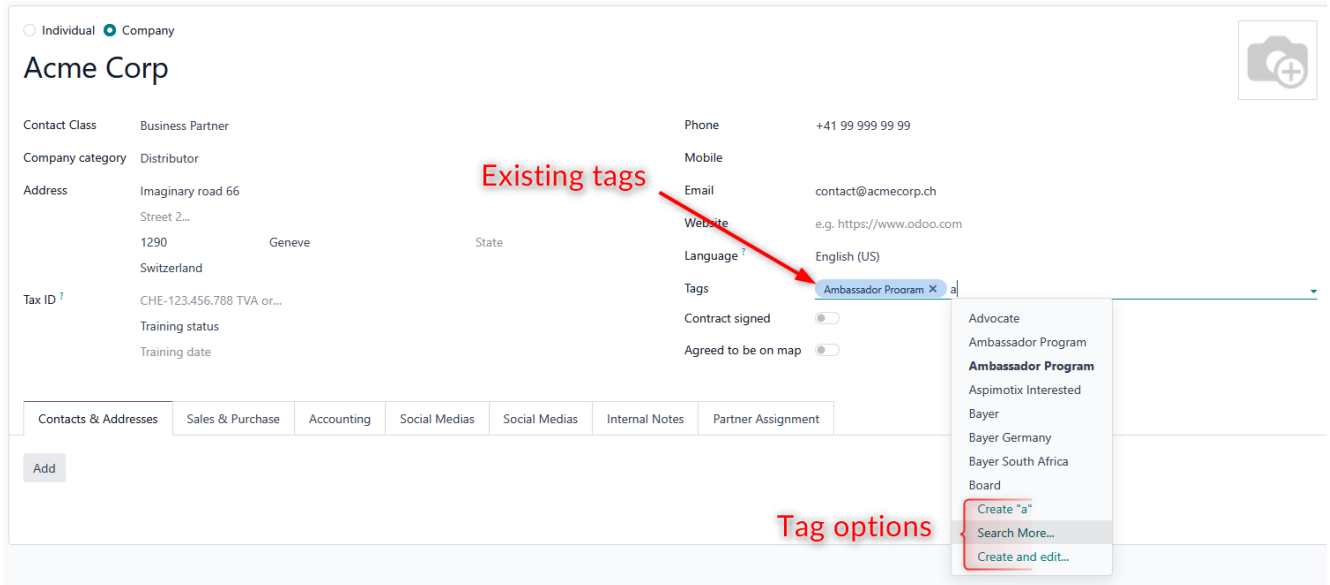
CLOSE

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 'Acme Corp' customer profile page. The 'Tags' field is highlighted with a red arrow and the text 'Existing tags'. The dropdown menu for 'Tags' is open, showing a list of tag options. The text 'Tag options' is written in red next to the dropdown menu.

Existing tags

Tag options

- Advocate
- Ambassador Program
- Ambassador Program**
- Aspimotix Interested
- Bayer
- Bayer Germany
- Bayer South Africa
- Board
- Create "a"
- Search More...
- Create and edit...

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

Sales Orders To Invoice Products Reporting Configuration									
New Upload Quotations									
Q My Quotations X Search...									
<input type="checkbox"/>	Currency Rate	Number	Creation Date	Last Updated on	Customer	Website	Salesperson	Tag customer	Activities
<input type="checkbox"/>	1.00	SO-02969	11/24/2025 13:02:17	11/24/2025 13:02:17	Acme Corp		Armand Polmard	Ambassador Program	Aspivix

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

Printed on 2025-11-26 - 16:16:10 UTC

Document Details

Created by: Armand Polmard

Document ID: 783

Created on: 11/26/2025 11:58:37 (UTC) Signature:

Creation IP Address: 81.250.240.58

a90d70d25303ffef7fbdeda5e65675c184083fccb5

Signers: 3

0a9d18797c05f3126c6d06

Participants

Signatory	Email	Email Verification
Armand Polmard	armand.polmard@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	289beb930acb7c7480ae73fe0b3e0aaf4a060a08efb7beba3e0f7cda445e5141	
Eva Kilimtzi	eva.kilimtzi@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	3f97903ae565a14bf4e557f31bdd2ec328d3445986c10e6a735937942aa50b68	
Mauro Rinaldi	mauro.rinaldi@aspivix.com	<input checked="" type="checkbox"/>
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
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contact@aspivix.com | <https://aspivix.com>

EU Importer: ASPIVIX SAS, 9 rue Thomas Edison, 25000 Besançon

Action	By	Date (UTC)	Geolocation	IP
Creation	Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:58:37	48.8558000, 2.3494000 View	81.250.240.58
Signature: a90d70d25303ffef7fbdeda5e65675c184083fccb50a9d18797c05f3126c6d06				
Signature 	Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:58:42	48.8558000, 2.3494000 View	81.250.240.58
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Signature: 6804f6538dcea627d64945e090bb6018d1585ce0bd1bf8390b448bfbc470e02				
Signature 	Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:25:16	47.3934000, 8.5163000 View	213.55.186.206
Signature: 899eb76a7bfbe29ab965b92bea3303aab71a816fdb0a592f92129380a983567				

✓ 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

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

EU Importer: ASPIVIX SAS, 9 rue Thomas Edison, 25000 Besançon

Viewed/downloaded by	Date (UTC)	State	Geolocation	ip
Armand Polmard armand.polmard@aspivix.com	11/26/2025 11:58:38	Before Signature	48.8558000, 2.3494000 🌐 View	81.250.240.58
Aspivix SA, Eva Kilimtzi eva.kilimtzi@aspivix.com	11/26/2025 12:05:02	Before Signature	46.4884000, 6.6557000 🌐 View	178.192.218.57
Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:24:42	Before Signature	47.3934000, 8.5163000 🌐 View	213.55.186.206
Aspivix SA, Mauro Rinaldi mauro.rinaldi@aspivix.com	11/26/2025 13:25:11	Before Signature	47.3934000, 8.5163000 🌐 View	213.55.186.206
Armand Polmard armand.polmard@aspivix.com	11/26/2025 16:16:07	After Signature	48.8558000, 2.3494000 🌐 View	81.250.240.58

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

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