APPROVAL

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PURPOSE

Customer relationship management (CRM) refers to the principles, practices, and guidelines ASPIVIX follows when interacting with its customers through sales.
This procedure describes how ASPIVIX creates and manages new customer opportunities as part of its sales cycle and policies on the Odoo platform.

SCOPE

The scope of this procedure includes any new customer contact and acquisition, new distribution or partnership opportunities, negotiation process, and re-purchase at different conditions from existing customers. Patient requests and Customer Services activities for an existing customer are out of scope.

RESPONSIBILITIES

The INT OPS is responsible for establishing, implementing, and maintaining this SOP. Any person creating or managing a customer opportunity or handling a prospect 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

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1. PROCEDURE DESCRIPTION

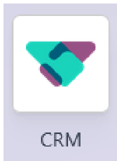
1.1. CRM OVERVIEW

CRM APP in Odoo helps ASPIVIX:

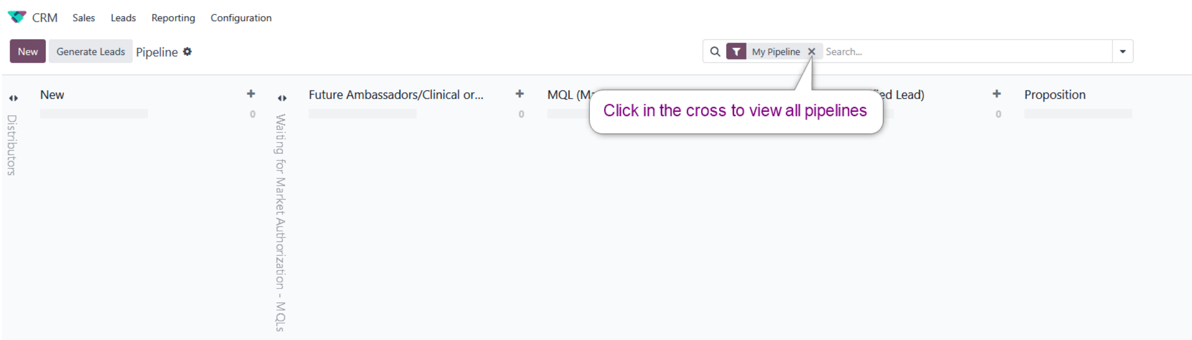
- Track different prospects and opportunities.
- Follow the status of customers' proposals.
- Move seamlessly to the Sales process when opportunities are won.

It is also designed to help with forecasting activities and KPIs generation.

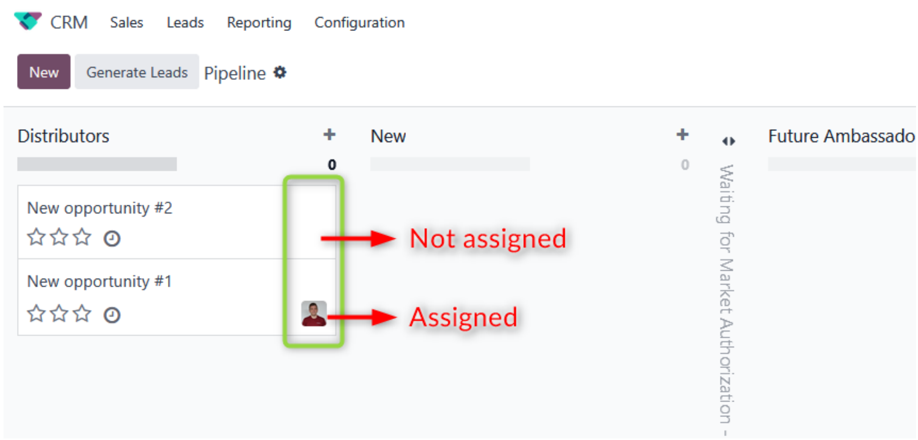
Click on the related APP from Odoo's main dashboard to enter the CRM APP.



While entering the APP, you will see the CRM pipeline, filtered by default under "My Pipeline".



To **view all pipelines and <u>new opportunities to manage</u>**, click the cross in the box My Pipeline to remove the filter. You will then view all different opportunities: those that are yours, new ones, or the ones assigned to other team members.



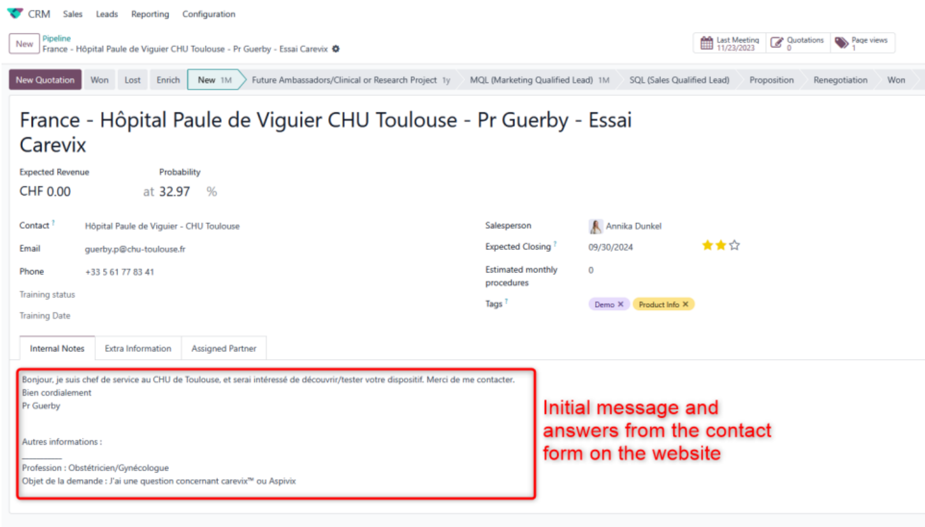
1.2. New opportunity creation

There are 2 ways to create new opportunities.

1.2.1. Opportunities from the contact form

A new opportunity will be created when a prospect, not having access to MyAspivix, fills in the contact form on MyAspivix by Healthcare Professionals.

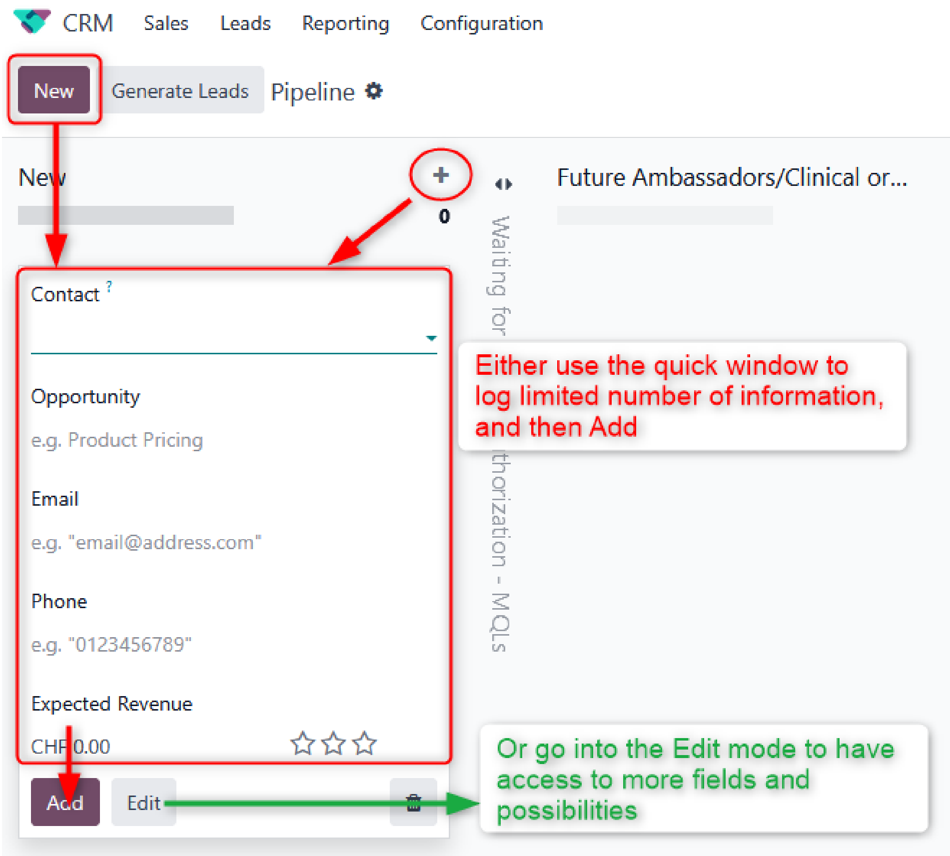
These opportunities will be created in the CRM APP in the stage “New”.
To view this new opportunity, click on that card in the Kanban view. Enter the edit mode by clicking on the top left corner to modify it as needed.



Additional information can be found in the Extra Information tab, such as additional answers from the contact form or KPIs related to this opportunity.

1.2.2. New opportunity from scratch

You can create a new opportunity from scratch by clicking “Create” in the Kanban view. Either use the quick window appearing to create a new opportunity or go into the Edit mode for more options.



The **only mandatory element** to create an opportunity is the opportunity’s name.

*To note, opportunities can be **created directly** within a specific stage by clicking the “+” button next to the stage title.*

1.3. Enriching an opportunity

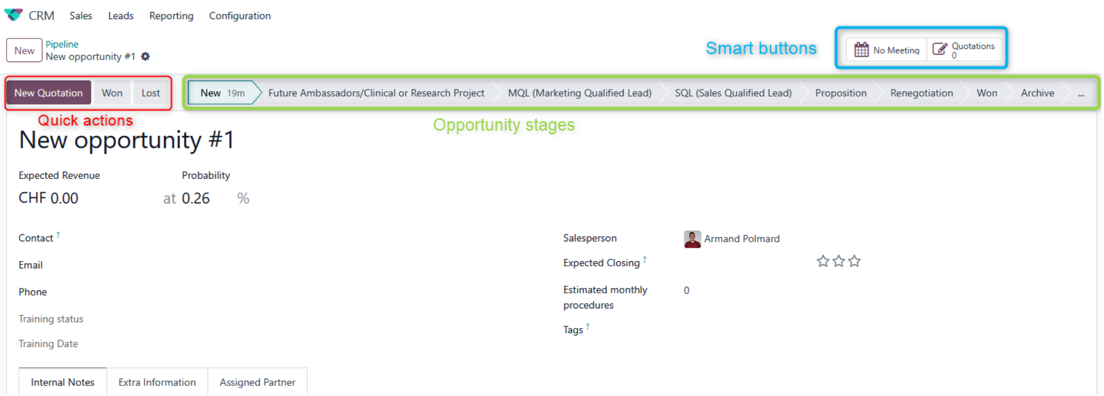
Throughout interactions with the prospect, one may request and add additional information to the opportunity, such as the prospect’s delivery and invoicing addresses, their phone number, website, or job position. This will help ASPIVIX maintain a good quality of the Customer Master Data as well as efficient back-up and storage of information.

You can add further elements to the opportunity such as priority level, expected revenue, contact details, expected closing date etc.

1.4. Managing an opportunity

Managing an opportunity (such as scheduling activities, communicating with customers or logging internal notes) can be done with the standard Odoo History Overview and Action Menu. Please refer to instruction “Basic Navigation & Account Setup” for more information.

Opportunities must also be managed with specific actions and functions of the CRM APP and policies of Aspivix. Some of these functions are listed below.



1.4.1. Quick actions

3 main quick actions are proposed from the top left corner of an opportunity: New quotation, Won, and Lost. Please refer to the following section, “Proposing A Quote, Wins and Losses” for more information.

1.4.2. Smart Buttons

Smart buttons within an opportunity provide an overview of meetings scheduled, quotations sent, or pages viewed by a prospect. To access the detailed information, click on any of these smart buttons.

1.4.3. Opportunity stages

Opportunities go through different stages during the sales cycle, which helps Aspivix track the status of different potential business relationships.

As displayed on the top of the Kanban columns, an opportunity can go through different stages that can be customizable for each sales team.

1.4.4. Changing stage for an opportunity

Based on the customer’s feedback and negotiation, an opportunity will be moved to different stages per the above definition. There are 2 possibilities to do that:

- Either “drag and drop” the opportunity from the Kanban view in different stages, or,
- while within a specific opportunity, click in the appropriate Opportunity Stage from the top right corner.

1.5. Proposing a quote, Wins and Losses

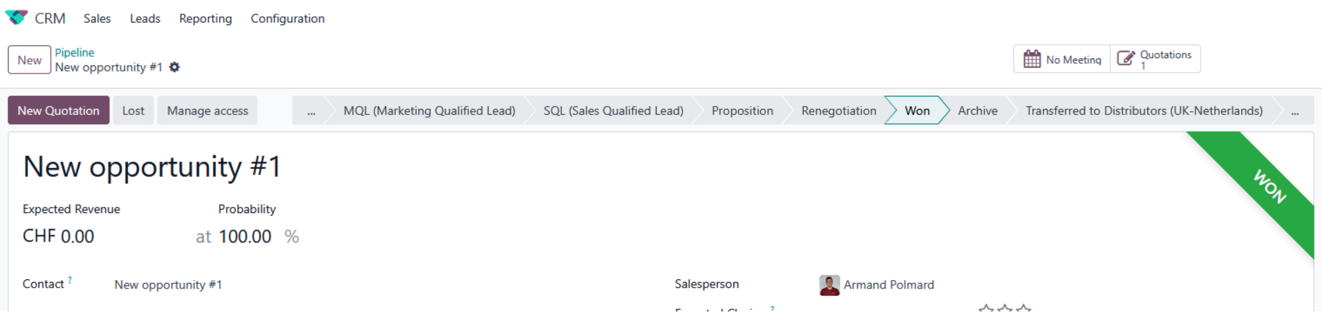
Some opportunities will lead to proposing a quotation to a customer, but all opportunities shall end in either “Won”, or “Lost” stages.

1.5.1. New Quotation

From an opportunity, you can directly send a quotation by clicking on the button “New Quotation”.
For more information about how to fill and send a quotation, please refer to the instruction “Sending a Quotation”.
A submitted quote will show into the Smart Buttons in the opportunity.

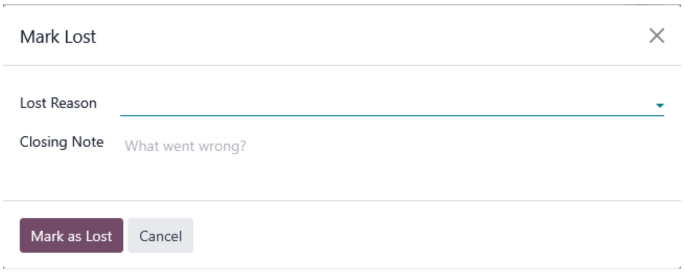
1.5.2. Won

When a prospect eventually orders a Product, the opportunity is considered Won.
Click the “WON” button next to “NEW QUOTATION” to automatically move the opportunity to this final stage.
A Won opportunity will display a green banner.

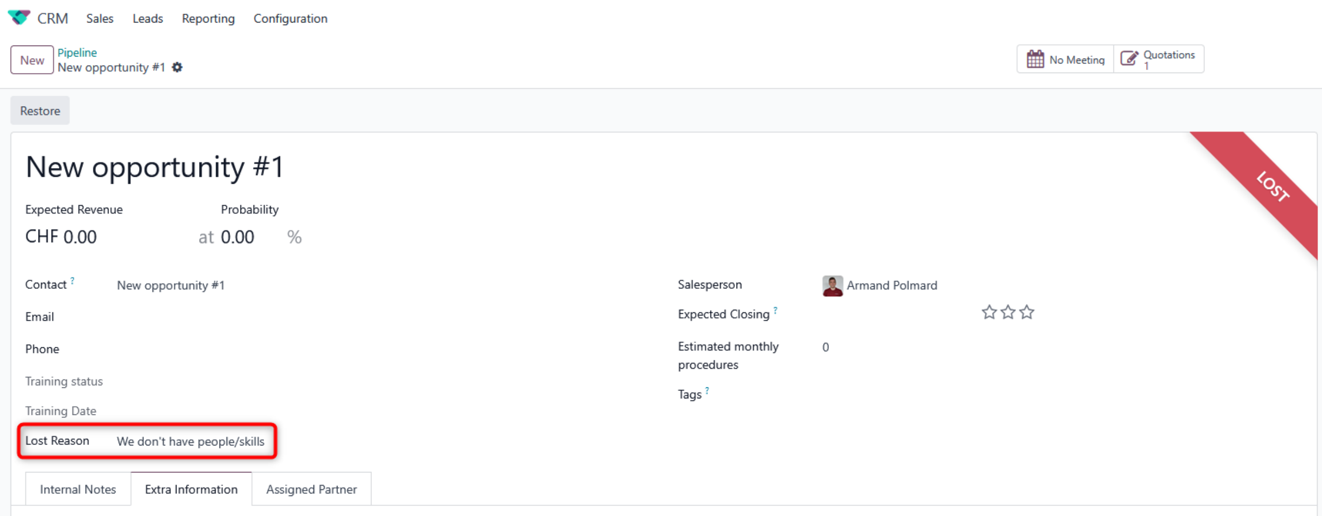


1.5.3. Lost

When a prospect decides NOT to order Carevix, the opportunity is considered Lost.
Click the “LOST” button next to “NEW QUOTATION” to automatically move the opportunity to this final stage.
While doing so, a new window will pop up to prompt the user to fill in the reason. Fill in the required information and click on Submit.



Lost opportunity will display a red banner.



2. REFERENCES

2.1. PROCEDURES, INSTRUCTIONS AND GUIDELINES

NA

2.2. TEMPLATES AND FORMS

NA

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