

APPROVAL

Role	Name	Function	Signature
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Approver	Mauro Rinaldi	RAQM	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">  Signed with Odoo Sign </div>

PURPOSE

This procedure describes how ASPIVIX creates, manages, and communicates new quotations to customers. It contains instructions on verifying customer addresses, prices, quantities, and other sales order elements (payment terms, currencies, etc.).

SCOPE

The scope of this procedure includes any quotation for an external customer, whether a Distributor, an institution such as a hospital or a clinic, or a private healthcare practitioner.

RESPONSIBILITIES

Responsible for establishing, implementing, and maintaining this instruction is the International Operations Manager. Any person creating or managing a quotation 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

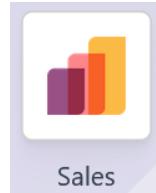
TABLE OF CONTENTS

1. INSTRUCTION DESCRIPTION	3
1.1. CREATING A QUOTATION	3
1.2. SUBMITTING A QUOTATION TO A CUSTOMER	5
1.3. QUOTATIONS SENT BY E-MAIL	5
1.4. SHARING A QUOTATION THROUGH ITS LINK	7
1.5. UPDATE OF SHIPPING COSTS	8
1.6. CONFIRMING A QUOTATION	8
2. REFERENCES	9
2.1. PROCEDURES, INSTRUCTIONS AND GUIDELINES	9
2.2. TEMPLATES AND FORMS	9

1. INSTRUCTION DESCRIPTION

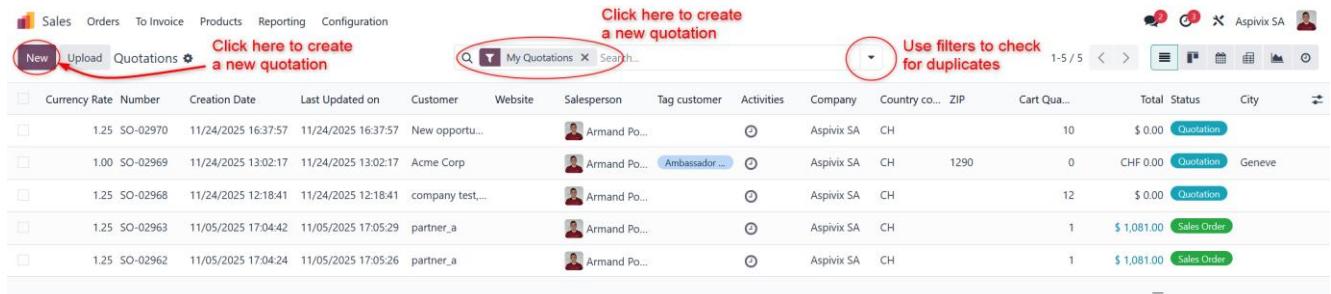
1.1. Creating a quotation

To create a quotation, open the Sales application by clicking on the respective APP from Odoo's main dashboard.



Quotations might also be created directly within the CRM APP by clicking New Quotation in an opportunity. Refer to instruction INS-205-5 Creating Quotations & Sales Orders for additional information. Creating a quotation from the CRM APP will open the same window as the one in the Sales APP.

Before creating a quotation, verify there is no active quotation for the same customer. For this purpose, remove "My Quotations" from the filter to review all quotations, or use the Filter options to filter out your specific customer. You can refer to the user guide "Lookup an order" for more information.



Sales												
Quotations												
New												
	Currency Rate	Number	Creation Date	Last Updated on	Customer	Website	Salesperson	Tag customer	Activities	Company	Country co...	ZIP
1.25	SO-02970	11/24/2025 16:37:57	11/24/2025 16:37:57	New opportu...	 Armand Po...		Aspivix SA	CH		10	\$ 0.00	Quotation
1.00	SO-02969	11/24/2025 13:02:17	11/24/2025 13:02:17	Acme Corp	 Armand Po...		Aspivix SA	CH	1290	0	CHF 0.00	Quotation
1.25	SO-02968	11/24/2025 12:18:41	11/24/2025 12:18:41	company test,...	 Armand Po...		Aspivix SA	CH		12	\$ 0.00	Quotation
1.25	SO-02963	11/05/2025 17:04:42	11/05/2025 17:05:29	partner_a	 Armand Po...		Aspivix SA	CH		1	\$ 1,081.00	Sales Order
1.25	SO-02962	11/05/2025 17:04:24	11/05/2025 17:05:26	partner_a	 Armand Po...		Aspivix SA	CH		1	\$ 1,081.00	Sales Order

If no duplicate quotation is found, click on Create.

1. Select your customer.
If the customer does not exist in the database, it will need to be created. More information about creating customers can be found in the instruction INS-205-2 Customer Creation & Maintenance.
2. Verify Delivery and Invoicing addresses with the information provided by the customer.
3. Pricelist and Payment Terms will default automatically from the customer creation.

Sales Orders To Invoice Products Reporting Configuration

New Quotations New

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New Select your customer here

Customer Expiration ? 12/25/2025

Invoice Address Recurring Plan

Delivery Address End Date ?

Quotation Template Pricelist ?

Delivery Address Payment Terms 15 Days

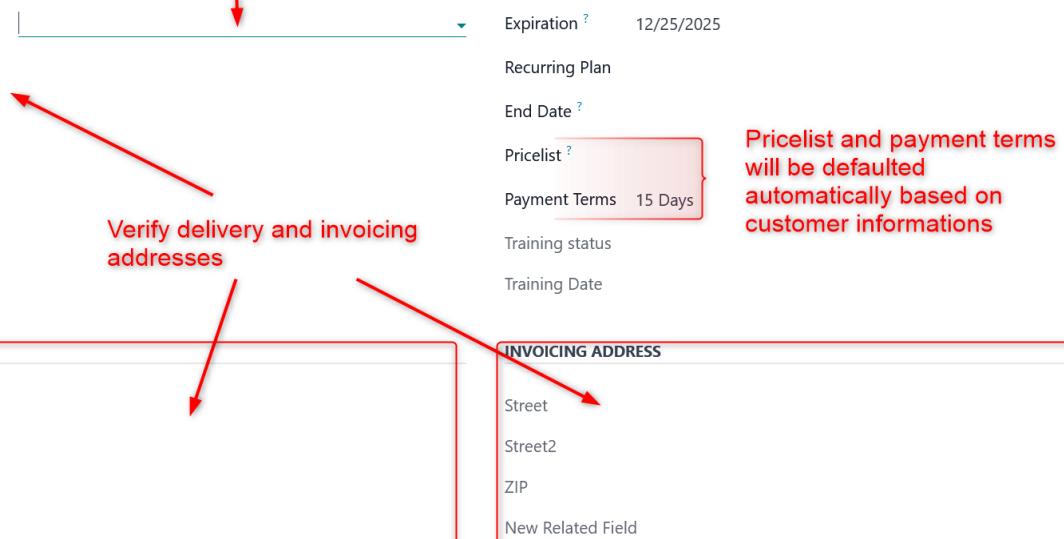
Verify delivery and invoicing addresses

Invoicing Address

Pricelist and payment terms will be defaulted automatically based on customer informations

Street Street2 ZIP City

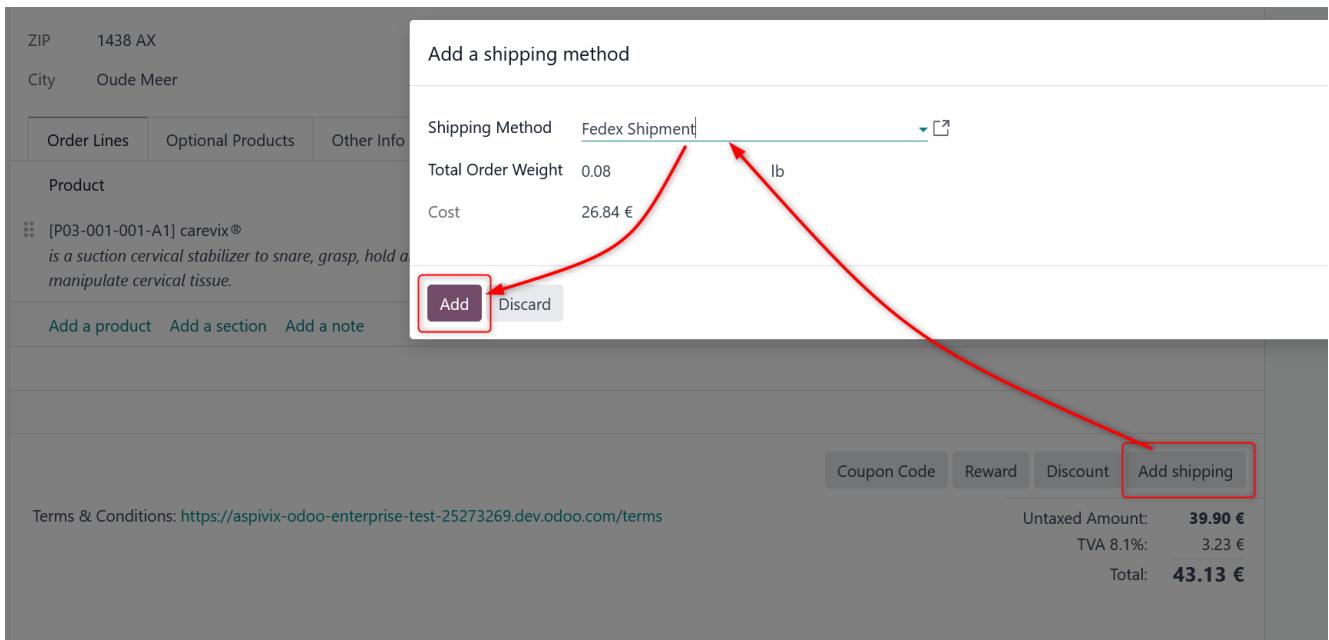
Street Street2 ZIP New Related Field



4. Click on **Add a product** in the Order Lines tab and select the product. Add the required quantity. Any wrongly entered line can be scrapped by clicking on the trash icon on the right side of the line

Order Lines	Optional Products	Other Info	Notes	Quantity	UoM	Unit Price	Taxes	Disc.%	Amount
[P03-001-001-A1] carevix® is a suction cervical stabilizer to snare, grasp, hold and manipulate cervical tissue.				1	Units	39.90	8.1% Sales	0.00	CHF 39.90
Add a product Add a section Add a note Catalog									
Coupon Code Reward Discount Add shipping									
Terms & Conditions: https://aspivix-odoo-enterprise-test-25273269.dev.odoo.com/terms					Untaxed Amount: CHF 39.90 TVA 8.1%: CHF 3.23 Total: CHF 43.13				

5. Add Freight Charges by clicking in **ADD SHIPPING**. Select Freight Charges in the window that just appeared and click on **ADD**. If the customer has reached the threshold to benefit from free shipping, the system will automatically populate 0 as freight costs



The mandatory steps have now been performed on the quotation. It is now ready to be sent to the customer.

⚠ To summarize, the verifications to do before sending a quotation to a customer are:

1. Customer name
2. Delivery and Invoicing addresses
3. Price list and payment terms
4. Products and quantity
5. Freight charges (offered or not)

1.2. Submitting a quotation to a customer

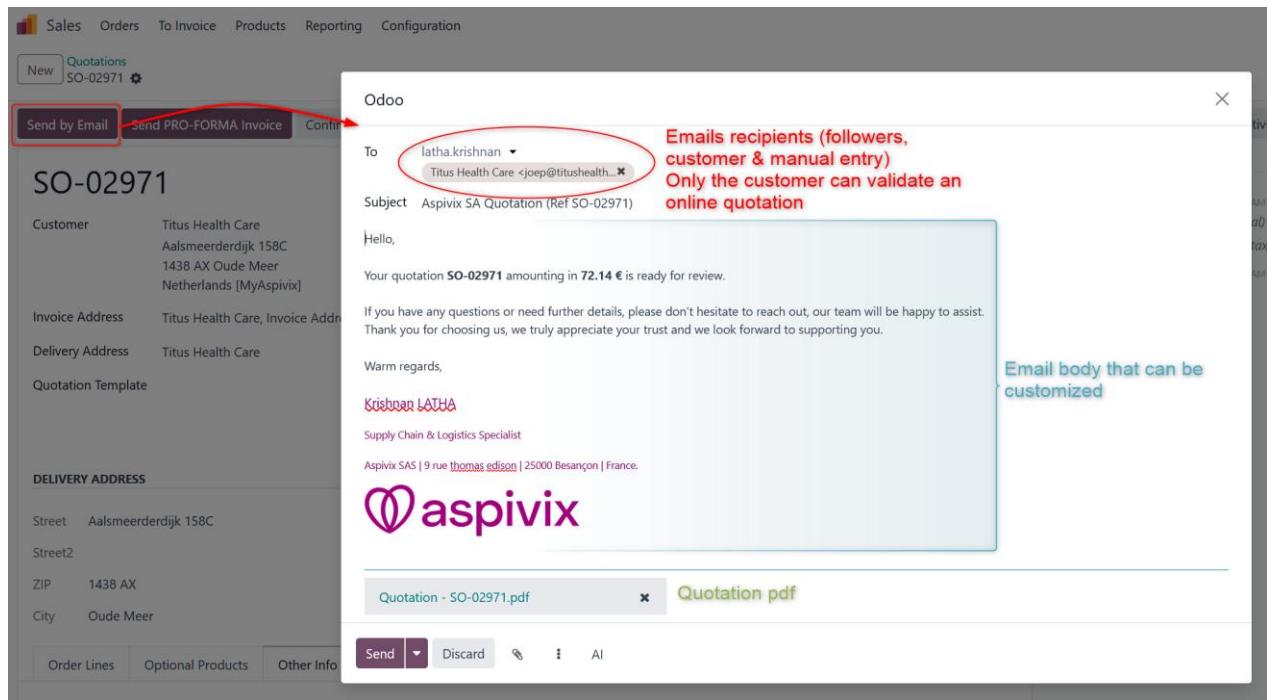
There are 2 main ways to send a quotation to a customer:

- Send the quotation by e-mail with Odoo's standard functionality. With this process, Odoo will generate an automatic e-mail from a template, attach a pdf version of the quotation, and add a link for the online version.
- Copy the link to forward it. With this process, a link to the quotation can be pasted in a separate e-mail or a text message.

1.3. Quotations sent by e-mail

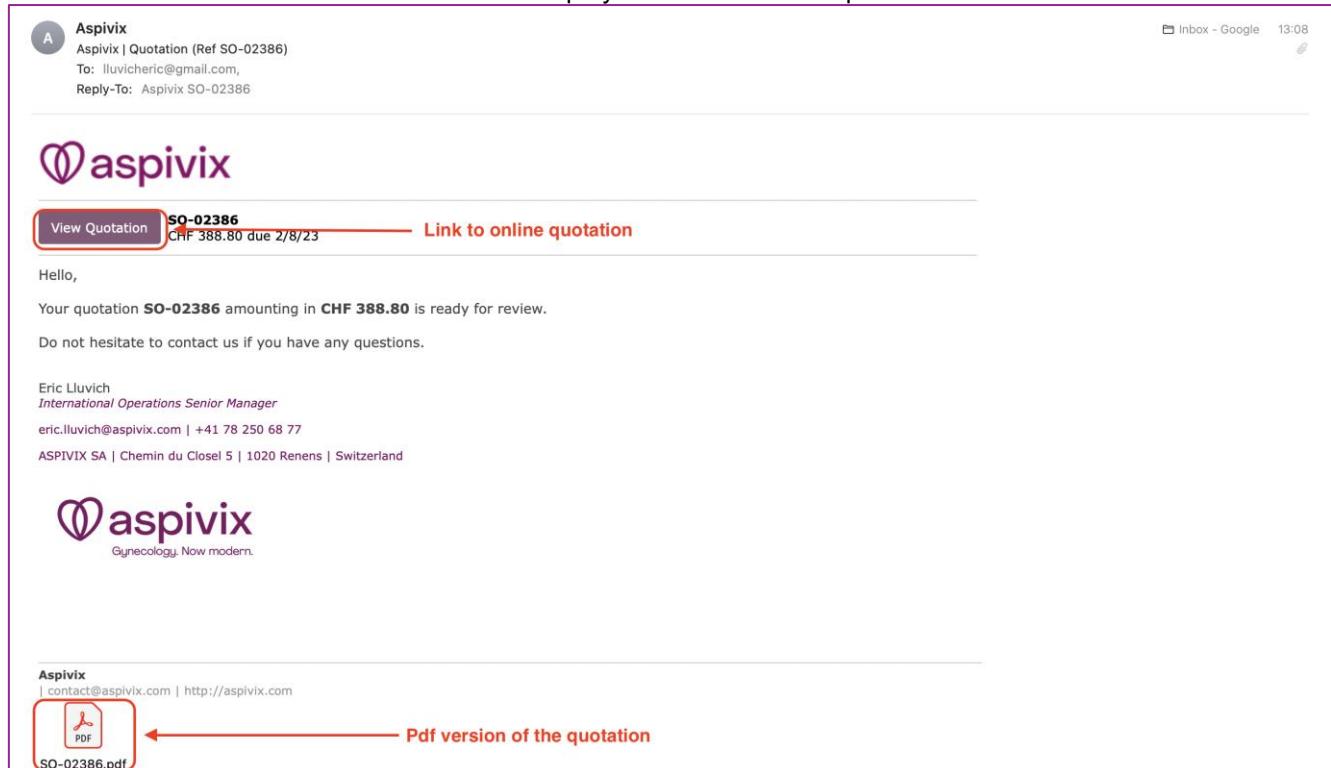
Click the button SEND BY EMAIL. In the window that is opening, you can:

- Add or remove recipients,
- modify the subject of the e-mail,
- modify the body if the e-mail.

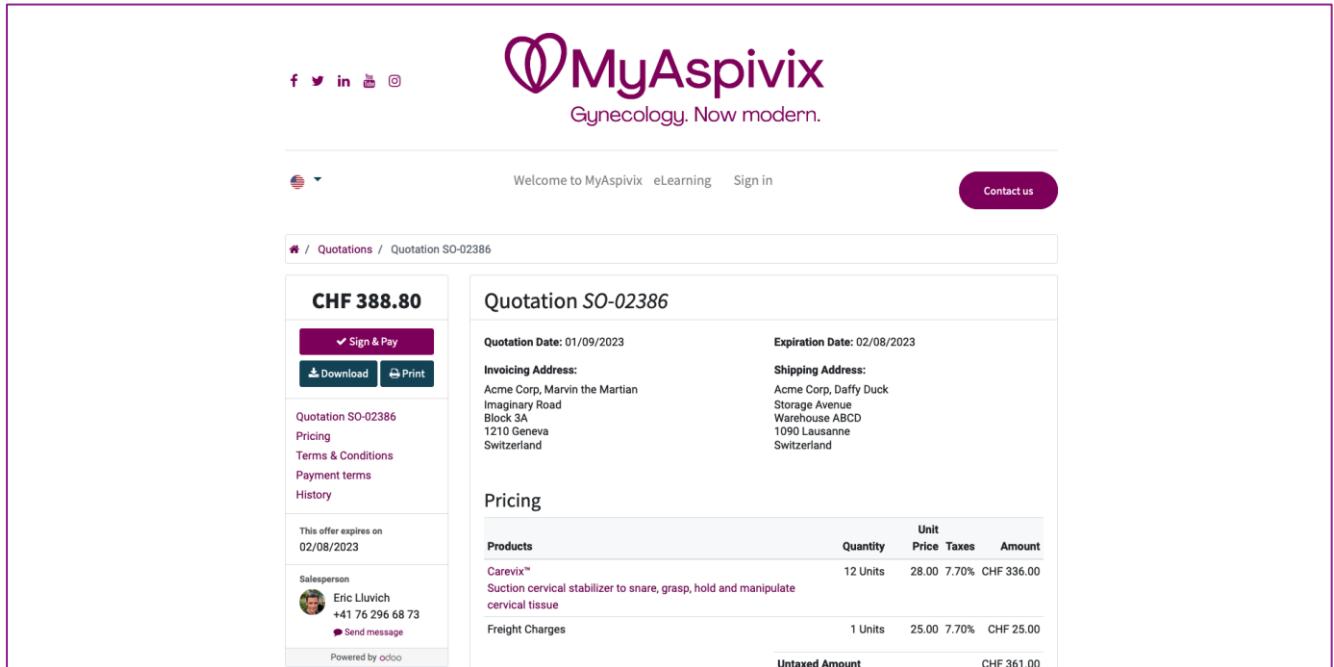


Click SEND to deliver the e-mail to the customer.

The customer will receive an e-mail that will display as the below example.



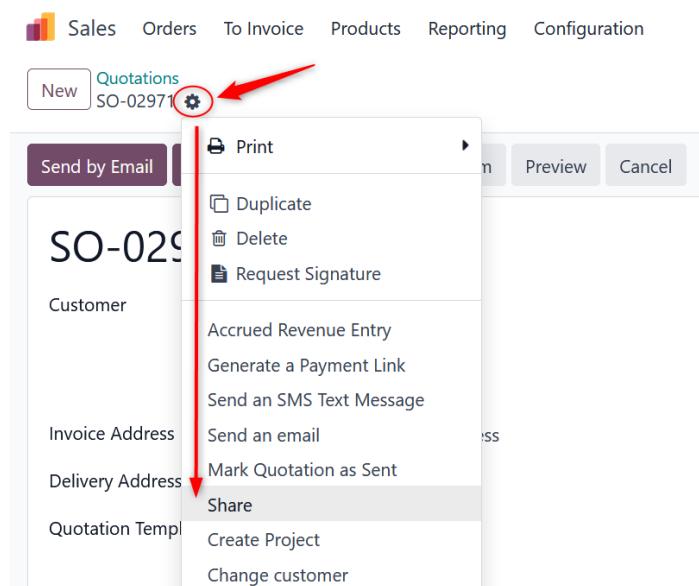
The customer's view of the online quotation will be as follow below. From this window, customers can sign, pay (if requested), comment, accept, or reject the quotation.



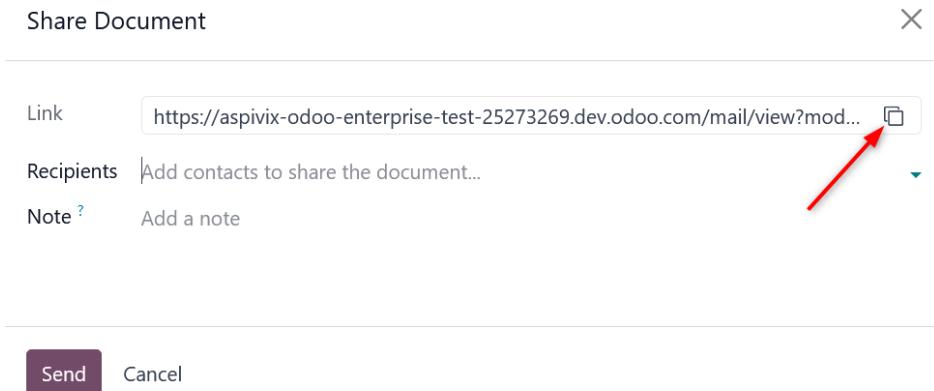
The internal user owning this quotation will be notified by email and in Odoo once the customer views the quotation or does any other action, such as adding comments.

1.4. Sharing a quotation through its link

Quotations can also be sent by sharing its link to the online version. Click in Action button in the center of the screen, and Share.



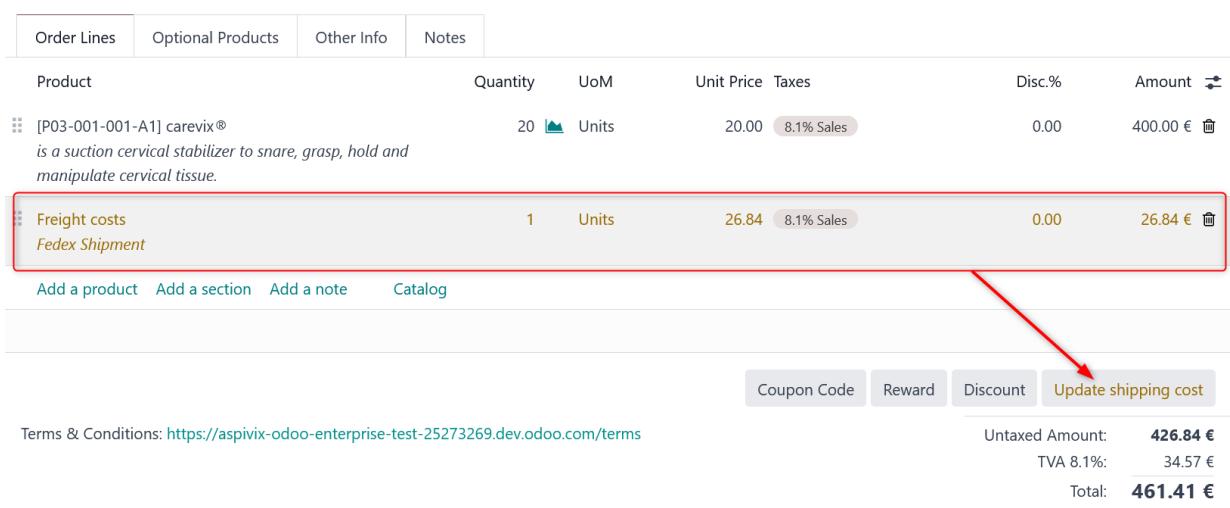
Click COPY in the new window to paste it, for example, in a separate e-mail or a text message.



1.5. Update of shipping costs

If there is a quantity change during the quotation process, there may be a need to update shipping costs. In the below example, quantities have increased from the original quotation, and shipping costs are now free of charge.

If an update is required, the line will turn yellow. Click UPDATE SHIPPING COST to update.



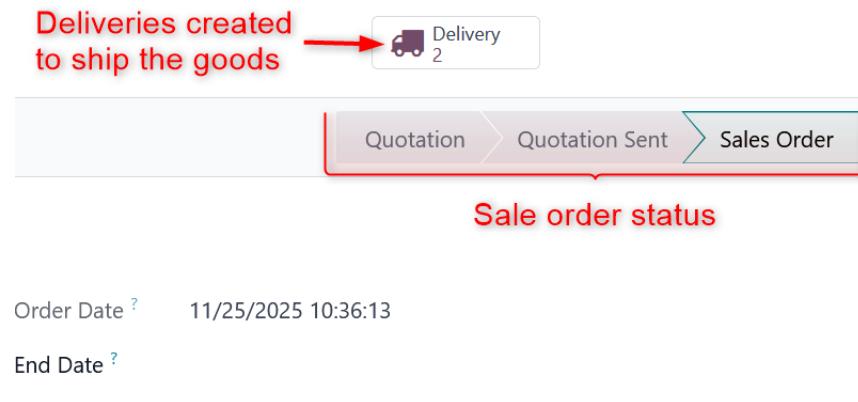
Order Lines	Optional Products	Other Info	Notes	Quantity	UoM	Unit Price	Taxes	Disc.%	Amount
[P03-001-001-A1] carevix® is a suction cervical stabilizer to snare, grasp, hold and manipulate cervical tissue.				20	Units	20.00	8.1% Sales	0.00	400.00 €
Freight costs Fedex Shipment				1	Units	26.84	8.1% Sales	0.00	26.84 €
Add a product Add a section Add a note Catalog									
Coupon Code Reward Discount								Update shipping cost	
Terms & Conditions: https://aspivix-odoo-enterprise-test-25273269.dev.odoo.com/terms								Untaxed Amount:	426.84 €
								TVA 8.1%:	34.57 €
								Total:	461.41 €

1.6. Confirming a quotation

Confirming a quotation will change the transaction status from Quotation to Sales Order. Consequently, This will push the transaction further in the Order to Cash process. It will also create Deliveries in Odoo to enable the shipping of goods.

Quotations must be confirmed ONLY when two criteria are met: The customer must have agreed to the quotation **AND** must have paid for the order (except payment terms agreed otherwise).

The status of the quotation can be checked in the right corner of the window.



The original quotation has now been transformed into a Sales Order and is ready to be shipped.

2. REFERENCES

2.1. Procedures, instructions and guidelines

NA

2.2. Templates and Forms

NA

Certificate of Completion

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Participants

Signatory	Email	Email Verification
Armand Polmard	armand.polmard@aspivix.com	<input checked="" type="checkbox"/>
Signatory's hash:	289beb930acb7c7480ae73fe0b3e0aa4a060a08efb7beba3e0f7cda445e5141	
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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Signature 	Aspivix SA, Eva Kilimtzidi eva.kilimtzidi@aspivix.com	11/26/2025 12:05:00	46.4884000, 6.6557000	178.192.218.57
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