Rationale: the change in the Partner model In OpenERP 7.0

On the principle…

(without base_contact installed)

Change in the model

V6.1 define two concepts:
➔ Partners (res.partner)
➔ Addresses (res.partner.address)

Two menus :
➔ Customers (Partners)
➔ Contacts (Addresses)

Addresses are always attached to a partner.

V7.0 define two concepts :
➔ Companies (or organisations)
➔ Persons

One menu :
➔ Customers

A person can be « an employee representing a company » or a standalone person (B2C)

Why did we change from from "Partner, Addresses" to "Companies, Persons"?

It better reflects real life

In the real life, you don't have « Partners » and « Addresses », you have « Companies » and « Persons »:

- **The concept of company** did not exist in v6.1 → it's a key info. For some legal reports, it's required to know who is company.

- **A person representing a company:** is a concept used on all business documents in the real life (every contract/SO has a signature like: "John Doe, for ACME »). It did not exist in v6.1. It was a company and an address.

- **Address Book**: we need to have a clean address book with companies and persons. (not some people in Customers and others in Contacts)

- **Hierarchies**: v7 allows hierarchies: multiple offices for one company and multiple persons working in each office

- **In the law**: you have «natural persons » and « legal persons » (companies)

Illustration
of the impacts

OPEN SOURCE MANAGEMENT SOLUTION

Where can I get information about John Doe?

In v6.1 :

- If John Doe is a customer (B2C), it's in res.partner
- If John Doe work for a company, it's in res.partner.address

In v7 :

- It's in the address book (res.partner)

Screenshot of 2 menus

Invoices

In v6.1, you need two fields on every business document : the partner « Acme » & the address. « John Doe »

In v7, one field holds the same information, « John Doe, Acme ».

Quotation SO008

Partner
ACME SA
Main Street 10
1348 Limal
Belgium

Address
ACME SA
John Doe
Main Street 10
1348 Limal
Belgium

Order Lines | Other Information

Quotation SO008

Customer
ACME SA
John Doe
Main Street 10
1348 Limal
Belgium

Order Lines | Other Information

--> Simpler, less useless info

--> no loss of info

V6.1's usability was wrong for B2C companies as users had to record the same information twice, on all business documents.

Quotation SO008

|	
Partner	John Doe Main Street 10 1348 Limal Belgium
Address	John Doe Main Street 10 1348 Limal Belgium

Order Lines | Other Information

So, on business documents, instead of having a "Acme" and "John Doe", you have « John Doe, Acme ».

This avoid having inconsistencies « John Doe », « AMCE »

It better reflects the real life

This allows more use cases than in v6.1:

- **In search** you can find invoices related to "John Doe, Acme" or you can find invoices related to "Acme" (which includes John Doe, Acme)

- **In Customer selection** you choose if you want to send your quote to ACME (info@acme) or to John Doe (john@acme)
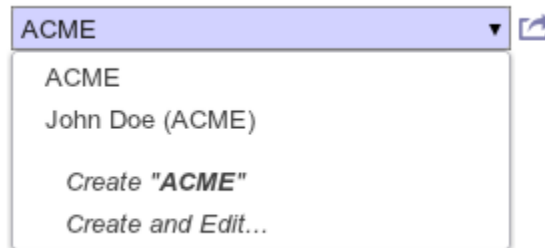
- **It support hierarchies & departments**:
  - ACME
    - ACME Bruxelles
      - John Doe
      - Accounting Department
    - ACME LLN

On the technical side…
(without base_contact installed)

Instead of having two tables (res.partner) and (res.partner.address), we have only one table holding companies, contacts. (res.partner)

Why ?

- Because they are all entities with whom you can do business. Sometimes you do business with persons, sometimes with companies, sometimes with person representing companies. (they are interchangeable)

But it's a big change?

It's not a so big change :

- Porting a module is very easy (just drop one field partner_id and rename address_id into partner_id on your documents) --> There are changes that are more complex in v7, like the new views.

- Our migration service do the job for you (OpenERP Enterprise)

- We test this since one year now (it has been demoed during the community days of 2012 and is in trunk since Jan 2011) We use this in production since 4 months.

- Check our scenario page for more info:
  - http://bit.ly/10WPN5S