

Rationale: the change in the Partner model In OpenERP 7.0

On the principle...
(without base_contact installed)

v6.1 defined two concepts:

- Partner
- Address

Two menus :

- Customers (Partners)
- Contacts (Addresses)

Addresses were always attached to a partner

v7.0 defines two concepts :

- Company (or organisation)
- Person

One menu :

- Customers

A person can be « an employee representing a company » (B2B) or a standalone person (B2C)

v6.1 use sometimes two fields to select a partner.

- On an invoice : Partner, Address
- On a sale order : Partner, Order Contact

V6.1 use sometimes one field to select a partner, e.g. on a sale order :

Invoice address or delivery address :

- Just 1 field for Invoice address
- Just 1 field for delivery address

Note that you can invoice/deliver another company than the one that purchased.

V7.0 is consistent : always one field to select a partner.

- e.g. on a sale order, one field per role : the one that order, the delivery, the invoicing (3 fields only)

Each role (e.g. The Customer on the invoice or SO) can be either :

- A company, e.g. « ACME SA »
- A person representing a company « ACME SA, John Doe »
- A person (B2C) : « John Doe »

Why this change from
from “Partners, Addresses”
to “Companies, Persons”?

Because it better reflects
the real life.

It better reflects the reality (1)

Business Card : it's always
Persons representing companies



OpenERP v7

John Doe
ACME

Quotations and Sales

Address	45th avenue, 25478 Boston Massachusetts 02116 United States	Job Position	Sales Manager
Website	http://www.acme.com	Phone	(616) 555-1234
		Mobile	
		Fax	
		Email	john.doe@acme.com
		Title	

It better reflects the reality (2)

Contracts, Orders, etc.
*are signed by **persons** on
behalf of **companies***



OpenERP v7
*Customer is **person**
on behalf of **company***

Sales Order SO019

Customer	ACME, John Doe 45th avenue, 25478 Boston, MA 02116 United States	Date	04/19/2013
		Customer Reference	

Order Lines Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal
[LCD24] 24" LCD Monitor	[LCD24] 24" LCD Monitor	1.000		250.00	250.00

Untaxed Amount : 250.00 €
Taxes : 0.00 €
Total : 250.00 €

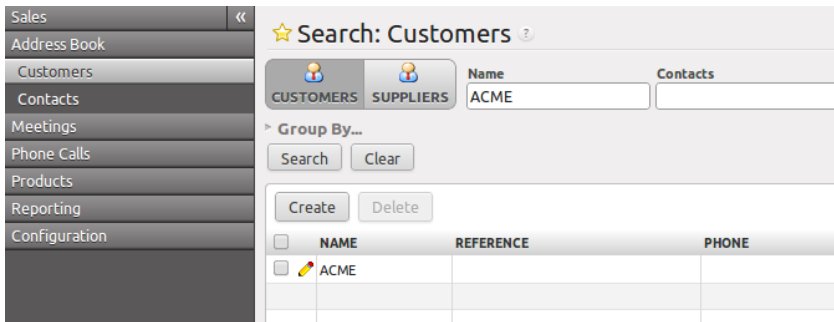
In the real life, you don't have « Partners » and « Addresses », you have « Companies » and « Persons »:

- **The concept of company** did not exist in v6.1 → for legal reports, it's required to know who is a company
- **OpenERP v7 is like “the law”**: you have «natural persons », « legal persons » (companies), and « natural persons acting on behalf of legal persons »
- **A person representing a company**: is a concept used on all business documents (every paper contract/SO has a signature like: “John Doe, for ACME »). It did not exist in v6.1. It was a company and an address.
- **There is a difference between**: doing a sale order to « ACME SA », doing a sale order to « ACME SA, John Doe » or doing a sale order to « John Doe » → impossible to manage in v6.1

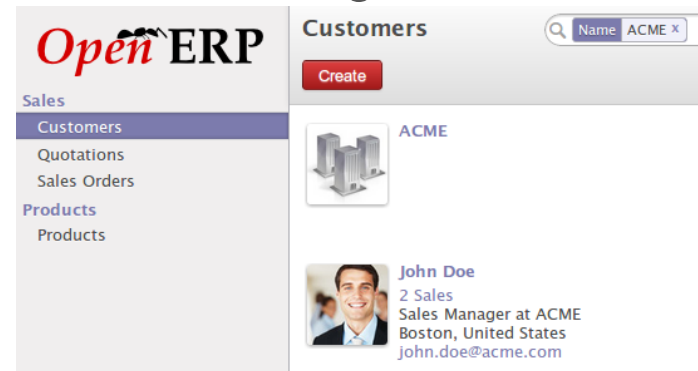
Illustration of the impacts

Address Book: unified address book with companies and persons

v6.1: 2 menus



v7: single menu



In v6.1: a contact « John Doe » was sometimes in Customers menu (B2C) or sometimes in Contacts menu (if he represent a company).
→ not consistent.

Hierarchies: v7 allows hierarchies: multiple offices for one company and multiple persons working in each office. → impossible in v6.1.

v6.1: unrelated customers

- ACME Corporation (partner)
- ACME Belgium (partner)
- + John Doe (address)

v7: correct hierarchy

- ACME Corporation (company)
- + ACME Belgium (company)
- + John Doe (contact)

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)

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**, « ACME, John Doe ». --> It's like contracts in the real life !

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 information !**

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

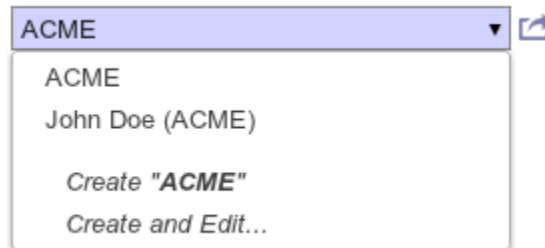
Other Information

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

This avoid having inconsistencies like:
« John Doe », « MECA »

This allows more use cases than in v6.1:

- **In search** you can find invoices related to “ACME, John Doe” (not easy in v6.1) or you can find invoices related to “ACME” (which includes “ACME, John Doe”)
- **In Customer selection** you choose if you want to send your quote to ACME (info@acme) or to ACME, John Doe (john@acme)



- **It support hierarchies & departments:**
 - ACME
 - ACME Bruxelles
 - John Doe
 - Accounting Department
 - ACME LLN

In v6.1, we had two fields on business documents (e.g. invoice) « Partner » and « Address ».

In v7, we have only one field: « Customer ».

Did we lose information?

No information is lost because:

- **We just removed redundancies** in v6.1 model, e.g. on invoices:
 - The Partner was « ACME SA » (partner_id)
 - The Address was « John Doe, ACME SA ». (address_id)
 - But:
 - partner_id == address_id.partner_id → always
 - if partner_id != address_id.partner_id → bugs

- **Problems of v6.1 redundancy:**
 - It allows creating inconsistencies, like an invoice having address with header “ACME SA” but another address.

Why is one field better in business documents:

- **Clearly define the responsibility;** who signed the document? a person (B2C), a person on behalf of the company or the company.

Information is not lost as you still have the two values:

- The customer (partner_id) and it's main entity **partner_id.commercial_id** (commercial_id being a function field of the res.partner object)

partner_id (Customer)	partner_id.commercial_id
ACME SA	ACME SA
ACME SA, John Doe	ACME SA
John Doe	John Doe

- In the above table, the third example is a person buying for himself.

And this is the biggest change: the main field «partner_id» is not anymore a «Company», but a « Customer » [1]

And the secondary field is not anymore the address [2] but the responsible entity. [3]
This is a change in the semantic of v7 fields.

[1] A customer could be « ACME SA, John Doe » or « ACME SA » or « ACME SA, Engineering Department ».

[2] Addresses are not recorded in separated objects anymore in v7 → it's company and contacts, instead of partner & address. Their address is directly linked to themselves..

[3] The responsible entity is a concept that did not exists in v6.1 as hierarchies were not supported.

But you absolutely need the second field on some business documents?

- Usually you do not need to have `commercial_id` in documents as you can get it directly in your code:
 - `partner_id.commercial_id`
- But sometimes you may want `commercial_id` on the object for technical reasons. (like `group_by` responsible entity) In such case we just add the second field like this on the object:
 - `commercial_id: fields.related('partner_id','commercial_id', 'Main Entity')`

On the technical side...
(without base_contact installed)

One single table (res.partner)

Instead of having two tables (res.partner) and (res.partner.address), we have only one table holding companies and 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 persons representing companies (they are interchangeable).

But it's a big change?

It's not such a big change :

- Porting a module is 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 can do the job for you (OpenERP Enterprise)
- Check the scenario page for more info:
 - <http://bit.ly/10WPN5S>