Move contact to new dealership

February 26, 2021 14:26

In Odoo, the correct procedure for moving a contact to a new dealership is as follows.

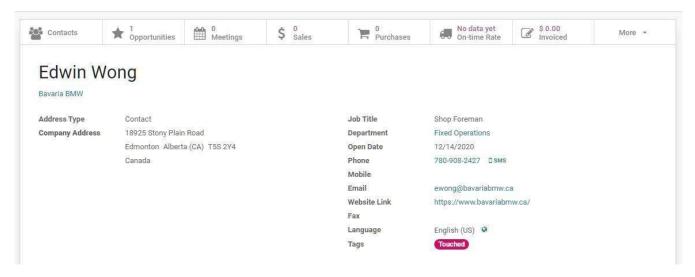
- 1. The original contact is archived
- 2. A new contact is created and is associated with the new dealership.

The problem with this process is that it does not transfer the chatter to the new contact.

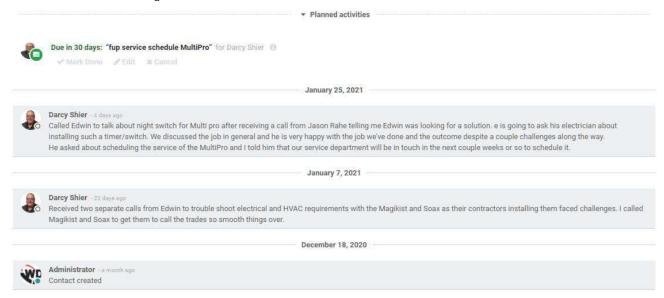
The address these issues we've created a new action that completed the above steps and copies the chatter to the new contact in one step.

To move a contact follow the following process.

This is the contact I want to move to a new dealership.



This is the chatter on this existing record.



Before the contact can be moved all activities must be cancelled.

If the activities are not cancelled you will not be able to move the contact and will get this error message



I've created a move contact action. Select it to move the contact to a new dealership.

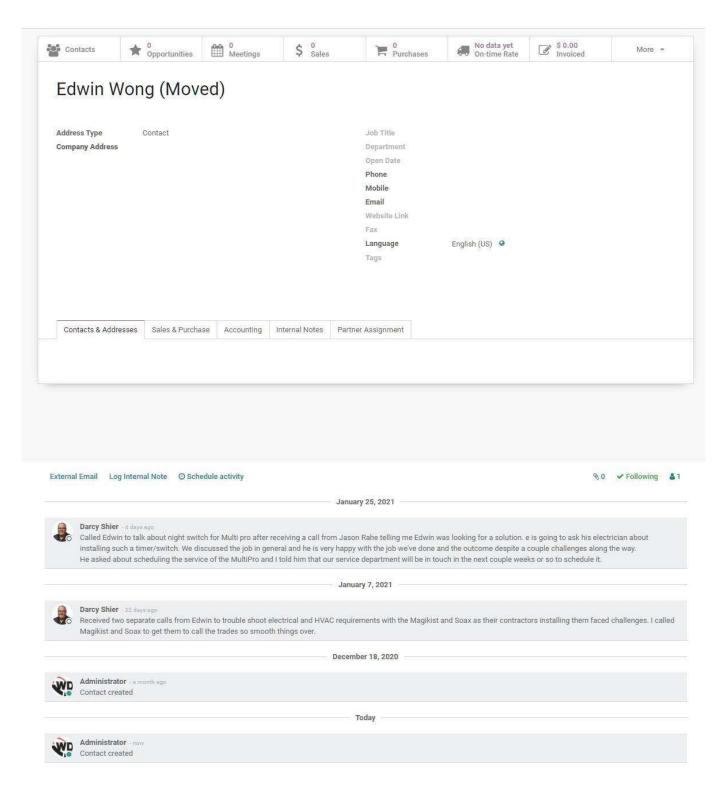
Contacts / Edwin Wong, Edmonton



The action creates the **new** contact, copies over the chatter and archives the original.

The phone number, mobile number and birthday are copied to the new contact. All other details will need to be entered.

The new contact is created with (Moved) appended to their name. This will need to be updated along with the other required information.



And the 'old' contact is archived.

