

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.

The screenshot shows the Odoo contact record for Edwin Wong, associated with Bavaria BMW. The top navigation bar includes tabs for Contacts, Opportunities (1), Meetings (0), Sales (0), Purchases (0), On-time Rate (No data yet), and Invoiced (\$ 0.00). The contact details are as follows:

Field	Value
Address Type	Contact
Company Address	18925 Stony Plain Road Edmonton Alberta (CA) T5S 2Y4 Canada
Job Title	Shop Foreman
Department	Fixed Operations
Open Date	12/14/2020
Phone	780-908-2427 SMS
Mobile	
Email	ewong@bavariabmw.ca
Website Link	https://www.bavariabmw.ca/
Fax	
Language	English (US) v
Tags	Touched

This is the chatter on this existing record.

The screenshot shows the chatter history for Edwin Wong, organized by date. The top section is titled "Planned activities" and includes a task "Due in 30 days: 'fup service schedule MultiPro' for Darcy Shier" with options to Mark Done, Edit, or Cancel. The chatter history is as follows:

Date	Activity
January 25, 2021	Darcy Shier - 4 days ago Called Edwin to talk about night switch for Multi pro after receiving a call from Jason Rahe telling me Edwin was looking for a solution. e is going to ask his electrician about installing such a timer/switch. We discussed the job in general and he is very happy with the job we've done and the outcome despite a couple challenges along the way. He asked about scheduling the service of the MultiPro and I told him that our service department will be in touch in the next couple weeks or so to schedule it.
January 7, 2021	Darcy Shier - 22 days ago Received two separate calls from Edwin to trouble shoot electrical and HVAC requirements with the Magikist and Soax as their contractors installing them faced challenges. I called Magikist and Soax to get them to call the trades so smooth things over.
December 18, 2020	Administrator - a month ago Contact created

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

The screenshot shows a "User Error" message box with the following text:

The contact has existing scheduled activities. Please cancel the activities before moving the contact.

There is an "OK" button at the bottom left of the message box.

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

Contacts / Edwin Wong, Edmonton

EDITCREATE

Contacts

0 Opportunities

0 Meetings

0 Sales

0 Purchases

0 Orders

More

Edwin Wong

Bavaria BMW, Edmonton

Address Type

Contact

Job Title

Shop Employee

Action

Archive

Duplicate

Delete

Grant portal access

Send SMS Text Message

Process follow-ups

Move contact to new dealership

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.

Contacts

0 Opportunities

0 Meetings

0 Sales

0 Purchases

No data yet
On-time Rate

\$ 0.00
Invoiced

More

Edwin Wong (Moved)

Address Type

Contact

Company Address

Job Title

Department

Open Date

Phone

Mobile

Email

Website Link

Fax

Language

English (US)

Tags

Contacts & Addresses

Sales & Purchase

Accounting

Internal Notes

Partner Assignment

External Email

Log Internal Note

Schedule activity

0

Following

1

January 25, 2021

Darcy Shier - 4 days ago

Called Edwin to talk about night switch for Multi pro after receiving a call from Jason Rahe telling me Edwin was looking for a solution. e is going to ask his electrician about installing such a timer/switch. We discussed the job in general and he is very happy with the job we've done and the outcome despite a couple challenges along the way. He asked about scheduling the service of the MultiPro and I told him that our service department will be in touch in the next couple weeks or so to schedule it.

January 7, 2021

Darcy Shier - 22 days ago

Received two separate calls from Edwin to trouble shoot electrical and HVAC requirements with the Magikist and Soax as their contractors installing them faced challenges. I called Magikist and Soax to get them to call the trades so smooth things over.

December 18, 2020

Administrator - a month ago

Contact created

Today

Administrator - now

Contact created

And the 'old' contact is archived.

Contacts	1 Opportunities	0 Meetings	0 Sales	0 Purchases	No data yet On-time Rate	\$ 0.00 Invoiced	More ▾
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Edwin Wong

[Bavaria BMW](#)

Address Type	Contact	Job Title	Shop Foreman
Company Address	18925 Stony Plain Road Edmonton, Alberta (CA) T5S 2Y4 Canada	Department	Fixed Operations
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		Phone	780-908-2427
		Mobile	
		Email	ewong@bavariabmw.ca
		Website Link	https://www.bavariabmw.ca/
		Fax	
		Language	English (US)
		Tags	Touched

ARCHIVED