

Reapit 12.176 release notes

These notes have been exported from the online Reapit Knowledge Base, therefore some formatting, layout and links may be lost in this format

To access the release notes via the Knowledge Base, [click here](#)

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These notes outline the latest additions and enhancements for the above version

Use your Reapit software to check which version you are using to see which features are available to you (your current version number is displayed at the bottom of the main menu bar)

Configuration options are available to Enterprise customers only

** Only applies to users of Client Accounts (UK) or Property Management Accounts (APAC)*

*** Only applies to users of Block Management*

General

Identify & manage duplicate contacts

This guide has been reviewed against our global client base and classed as relevant to all regions

If the same phone number and/or email address is entered on more than one contact record, it will be flagged as a potential duplicate via the contact record - details of potential duplicate record(s) can then be viewed

A potential duplicate record can also be marked as a legitimate duplicate and a reason for this stored

Where configured, a user can choose to merge selected duplicates and/or revert previously merged records

The ability to merge selected duplicates and/or revert previously merged records is a configurable option for Enterprise customers

To request one/both of these options to be enabled on your system, contact Reapit Support

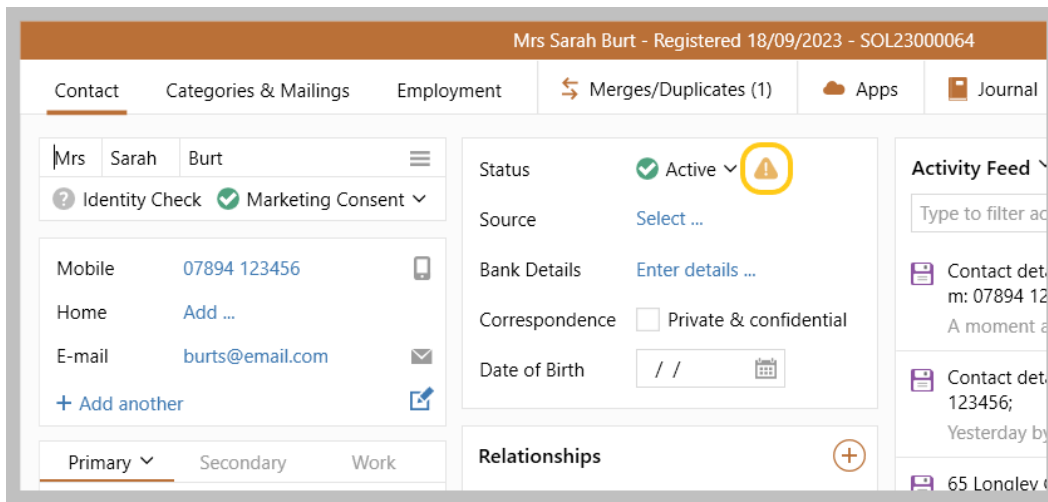
Identify & view details of potential duplicates (inc. how to ignore a potential duplicate alert)

1. Potential duplicate alert on contact record

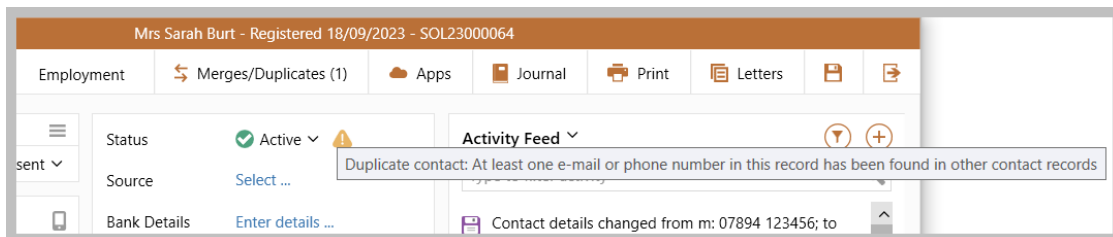
A potential duplicate is identified when at least one phone number and/or email address is detected on more than one contact record

On contact record:

- On the middle panel, an exclamation mark is displayed beside **Status**



- Hovering over the exclamation mark displays more information

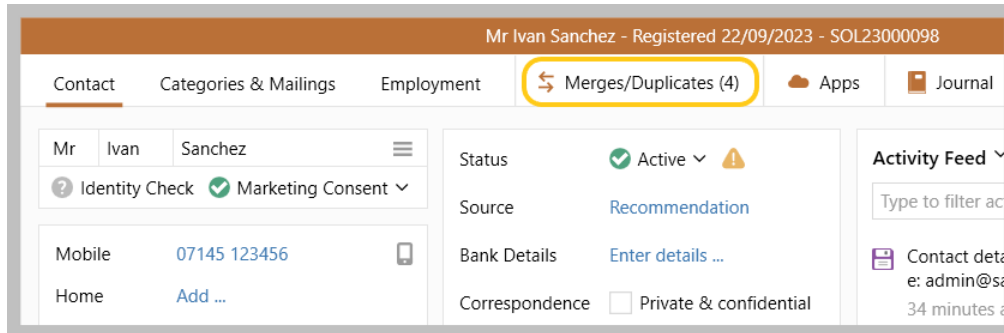


2. View details of potential duplicate(s)

The **Merges/Duplicates** button displays the number of potential duplicates the contact currently has, click the button to display more details

On contact record:

- Click **Merges/Duplicates**



Mr Ivan Sanchez - Registered 22/09/2023 - SOL23000098

Contact Categories & Mailings Employment **Merges/Duplicates (4)** Apps Journal

Mr Ivan Sanchez

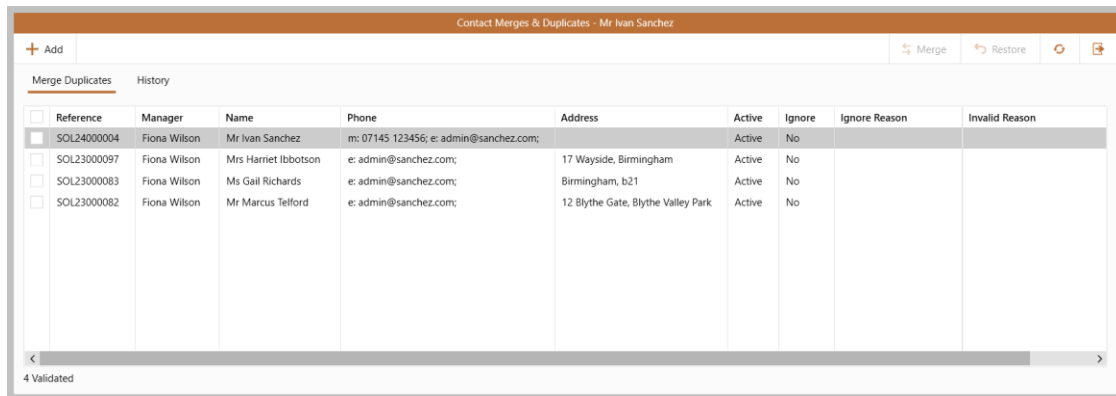
Identity Check Marketing Consent

Mobile 07145 123456 Home Add ...

Status Active Source Recommendation Bank Details Enter details ... Correspondence Private & confidential

Activity Feed

- The **Merges & Duplicates** screen shows details of all active duplicates for the contact



Reference	Manager	Name	Phone	Address	Active	Ignore	Ignore Reason	Invalid Reason
SOL24000004	Fiona Wilson	Mr Ivan Sanchez	m: 07145 123456; e: admin@sanchez.com;		Active	No		
SOL23000097	Fiona Wilson	Mrs Harriet Ibbotson	e: admin@sanchez.com;	17 Wayside, Birmingham	Active	No		
SOL23000083	Fiona Wilson	Ms Gail Richards	e: admin@sanchez.com;	Birmingham, b21	Active	No		
SOL23000082	Fiona Wilson	Mr Marcus Telford	e: admin@sanchez.com;	12 Blythe Gate, Blythe Valley Park	Active	No		

4 Validated

- A list of the duplicates is shown showing basic contact details
- Double-click an entry to view the associated contact record
- If the contact has the potential duplicate alert set to ignore, the **Ignore** column will show as **Yes** and the associated **Ignore Reason** is displayed to the right
For more information on ignoring a duplicate, see step 3

- To the left of the contact:
 - where a tick box is shown (as shown above), it is possible to merge the contact

*The ability to merge contact records is dependent on configuration, see section below titled: **Merge duplicate contacts (where configured)***

- where a grey cross is shown, the contact is invalid for merging and the **Invalid Reason** is displayed to the right of the grid (shown below)

Reference	Manager	Name	Phone	Address	Active	Ignore	Ignore Reason	Invalid Reason
<input checked="" type="checkbox"/> SOL23000065	Fiona Wilson	Mr Adam Burt	m: 07894 123456; e: burts@e...	145 New Coventry Road, Birming...	Active	No		Vendor of a property with a status of For Sale, Under Offer,...

A list of reasons why a contact could be classed as invalid for merging can be found in the section below titled: **Instances where a contact cannot be merged**

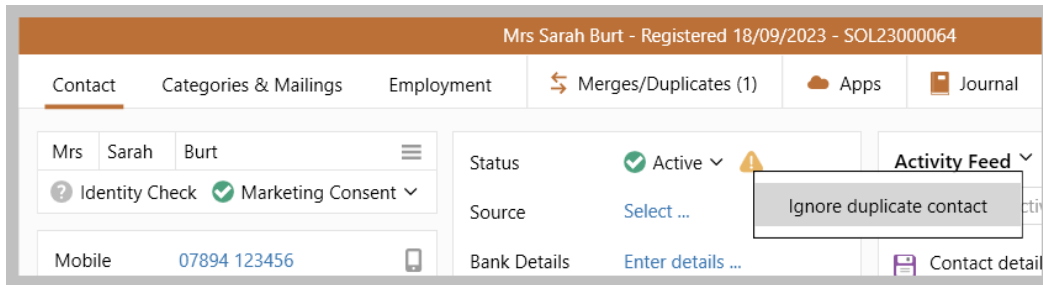
3. Mark duplicate a legitimate duplicate / ignore duplicate contact

When a contact has been flagged as a potential duplicate, an option to ignore the duplicate is available. Choosing to ignore a potential duplicate contact prevents the contact record from being offered as an option to be merged.

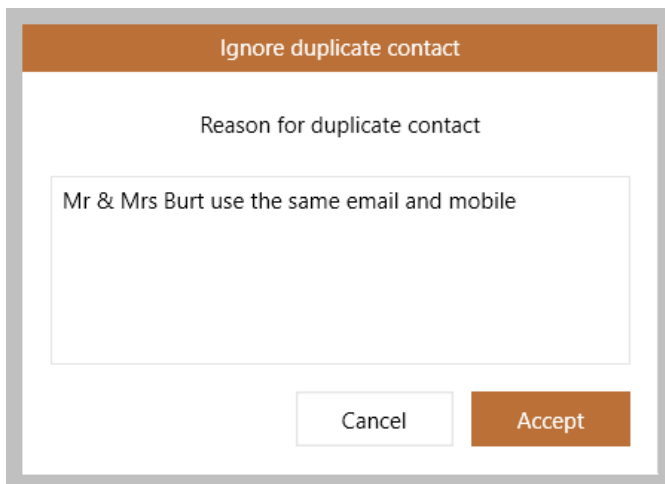
For more information on merging contacts, see section below titled: **Merge duplicate contacts (where configured)**

On contact record:

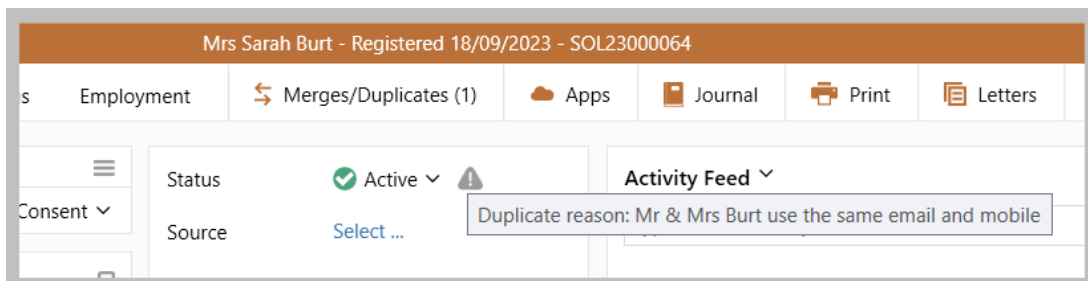
- Right-click exclamation mark and select **Ignore duplicate contact**



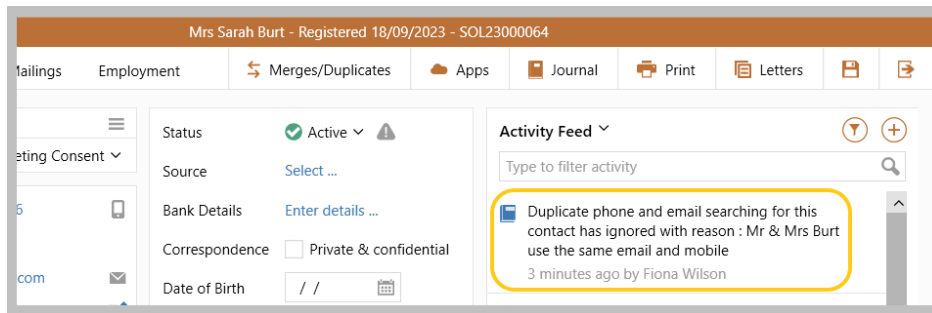
- Enter the reason to ignore the duplicate contact and click **Accept**



- The exclamation mark is displayed grey - hovering over it displays the duplicate reason



- This information is logged in the contact **Activity Feed** and also the contact **Journal, Miscellaneous** section



Each potential duplicate needs to be ignored on an individual basis - ignoring a duplicate contact (as outlined above) will only ignore *this* contact as a potential duplicate

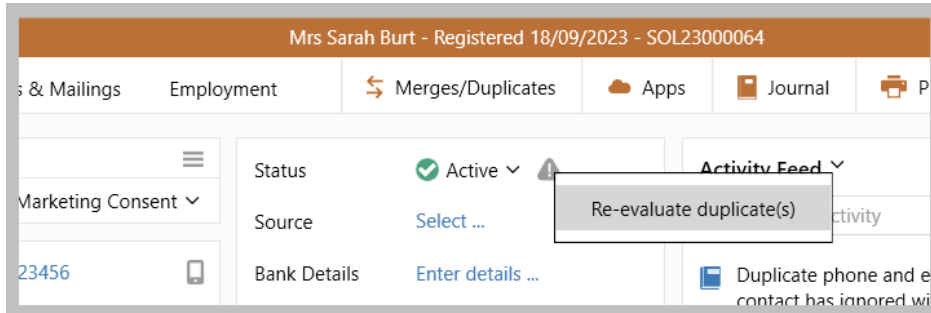
In this example, Mr Burt's contact record will continue to have an active potential duplicate flag until it is also marked as ignored

4. Remove ignored duplicate

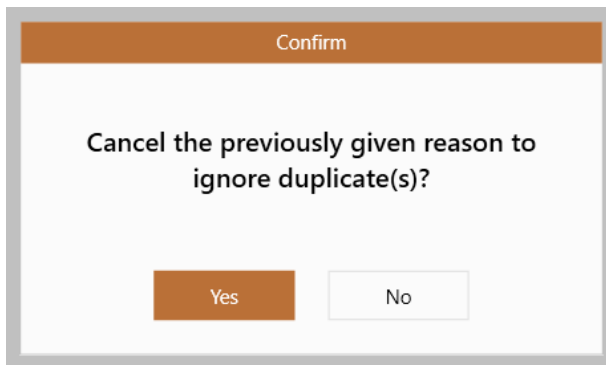
When a potential duplicate has been set to ignore (as outlined in section 3), this can be removed

On contact record:

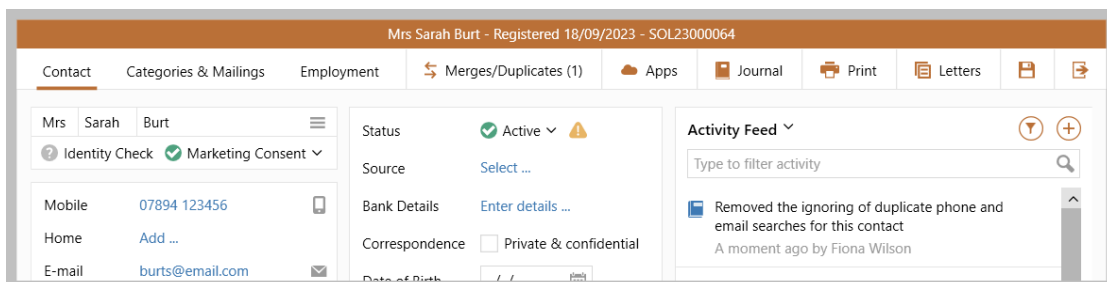
- Right-click exclamation mark and select **Re-evaluate duplicate(s)**



- Click **Yes**



- The duplicate alert is displayed (as before), plus the Activity Feed and Journal is updated to reflect the change



Merge duplicate contacts (where configured)

The ability to merge selected duplicates is a configurable option for Enterprise customers
To request this option to be enabled on your system, contact [Reapit Support](#)

When a contact has an active potential duplicate alert, they can be merged via the **Merges/Duplicates** screen - a merge can be carried out if:

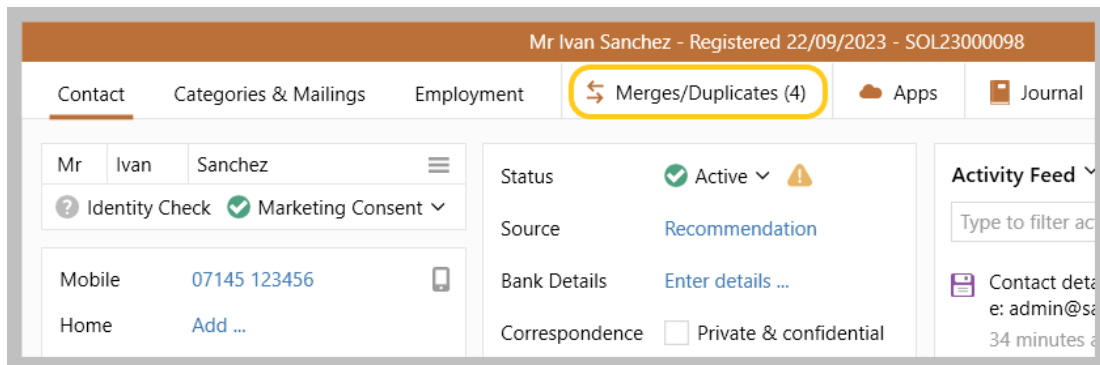
- the user is set-up to be able to carry out a duplicate merge AND
- the contact does not have a reason why they cannot be merged

For a list of reasons why a contact record can be classed as invalid for merging, see the section below titled: **Instances where a contact cannot be merged**

1. Access potential duplicates

On contact record:

- Click **Merges/Duplicates**



- The **Merges & Duplicates** screen is displayed (shown in the next step)
This screen shows details of all active duplicates for the selected contact
 - Double click an entry to view the contact
 - **Add** button (top left) allows a non-detected contact to be added to the screen manually

2. Merge contact(s) with the current contact

From **Merges & Duplicates** screen:

- Tick the box to the left of required contact(s) to be merged with the current contact
- Click **Merge** (top right)

Contact Merges & Duplicates - Mr Ivan Sanchez - 1 of 4 selected

+ Add Merge Restore

Merge Duplicates History

<input type="checkbox"/>	Reference	Manager	Name	Phone	Address	Active	Ignore
<input checked="" type="checkbox"/>	SOL24000004	Fiona Wilson	Mr Ivan Sanchez	m: 07145 123456; e: admin@...		Active	No
<input type="checkbox"/>	SOL23000097	Fiona Wilson	Mrs Harriet Ibbotson	e: admin@sanchez.com;	17 Wayside, Birmingham	Active	No
<input type="checkbox"/>	SOL23000083	Fiona Wilson	Ms Gail Richards	e: admin@sanchez.com;	Birmingham, b21	Active	No
<input type="checkbox"/>	SOL23000082	Fiona Wilson	Mr Marcus Telford	e: admin@sanchez.com;	12 Blythe Gate, Blythe Valley Park	Active	No

4 Validated

- Click **Yes** to proceed with the merge

Contact Merges & Duplicates - Mr Ivan Sanchez - 1 of 4 selected

+ Add Merge Restore

Merge Duplicates History

Confirm

Warning: This cannot be undone.

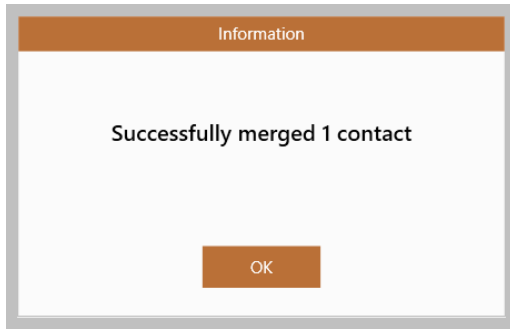
Are you sure you want to merge 1 contact into Mr Ivan Sanchez?

Yes No

<input type="checkbox"/>	Reference	Manager	Name	Phone	Address	Active	Ignore
<input checked="" type="checkbox"/>	SOL24000004	Fiona Wilson	Mr Ivan Sanchez	m: 07145 123456; e: admin@...		Active	No
<input type="checkbox"/>	SOL23000097	Fiona Wilson	Mrs Harriet Ibbotson	e: admin@sanchez.com;	, Birmingham	Active	No
<input type="checkbox"/>	SOL23000083	Fiona Wilson	Ms Gail Richards	e: admin@sanchez.com;	n, b21	Active	No
<input type="checkbox"/>	SOL23000082	Fiona Wilson	Mr Marcus Telford	e: admin@sanchez.com;	ate, Blythe Valley Park	Active	No

4 Validated

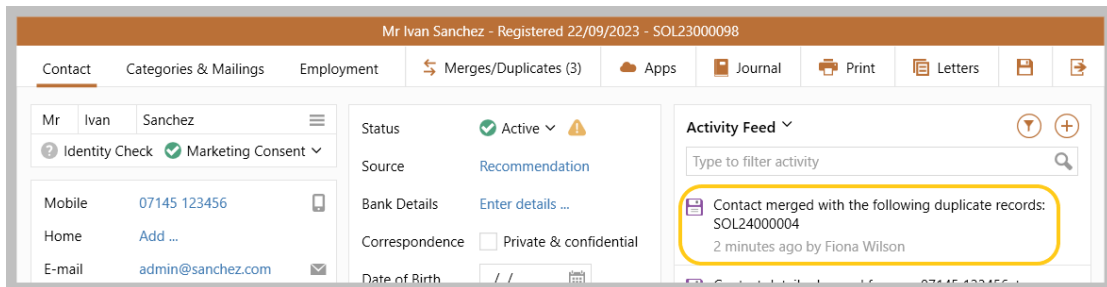
- Click **OK**



The merged-in contact's/contacts' roles are merged into the selected contact record

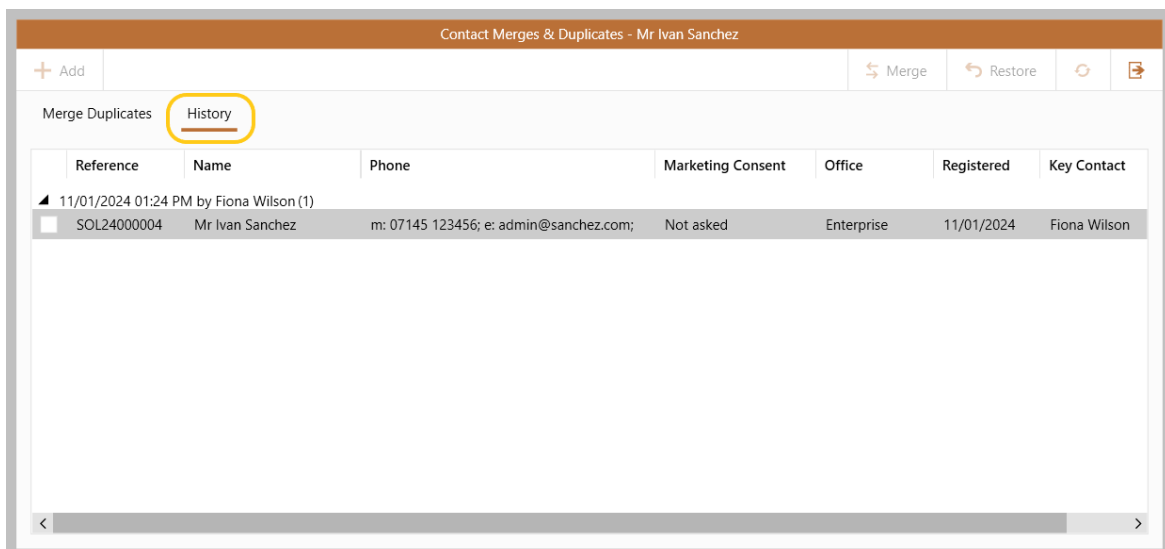
The merged-in contact is moved to the archive - it is also taken out of the **Merge Duplicates** tab and moved to the **History** tab of the Merges & Duplicates screen, see step 3

- The merge information is logged in the contact **Activity Feed** and also the contact **Journal, Detail Change** section



3. Merge history

The **History** tab of the Merges & Duplicates screen shows details of any merged-in contacts to the currently selected contact



This screen can be used to revert the contact merge (where configuration allows), see next section

Revert previously duplicated contacts (where configured)

The ability to revert/restore previously merged records is a configurable option for Enterprise customers
To request this option to be enabled on your system, contact Reapit Support

When a contact has been previously merged, the merge can be reverted via the **Merges/Duplicates** screen - original contact records can be restored if:

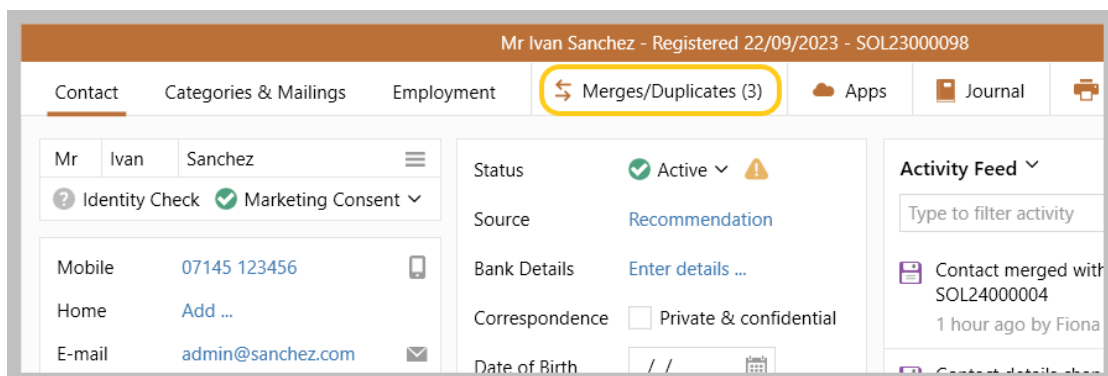
- the user is set-up to be able to carry out a revert on a previously merged contact AND
- the contact does not have a reason why they cannot be restored

Restoring previously merged contact is not possible if certain activities have taken place since the contacts records were merged - for a list of these activities, see section below titled: **Instances where a merged contact cannot be restored**

1. Access previously merged contact record(s)

On contact record:

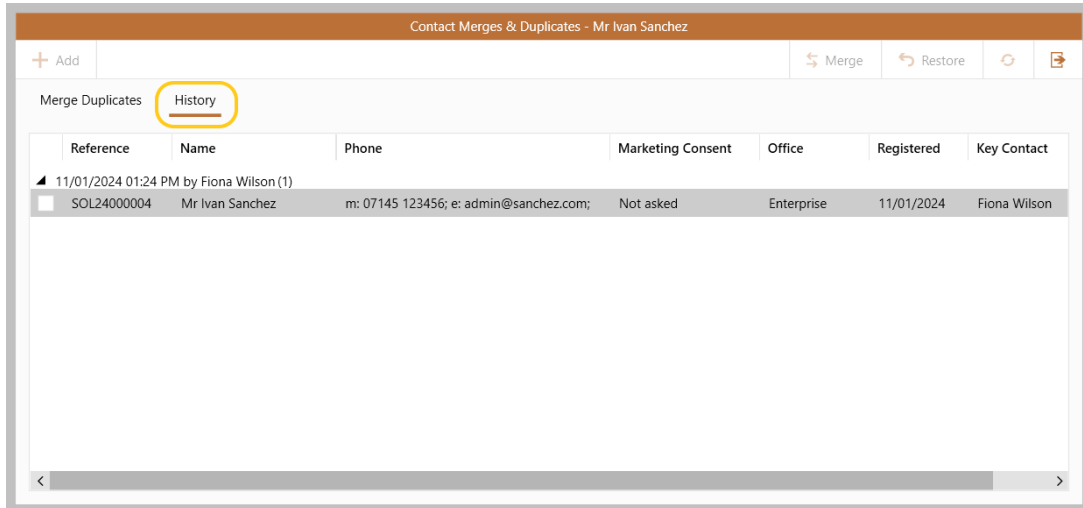
- Click **Merges/Duplicates**



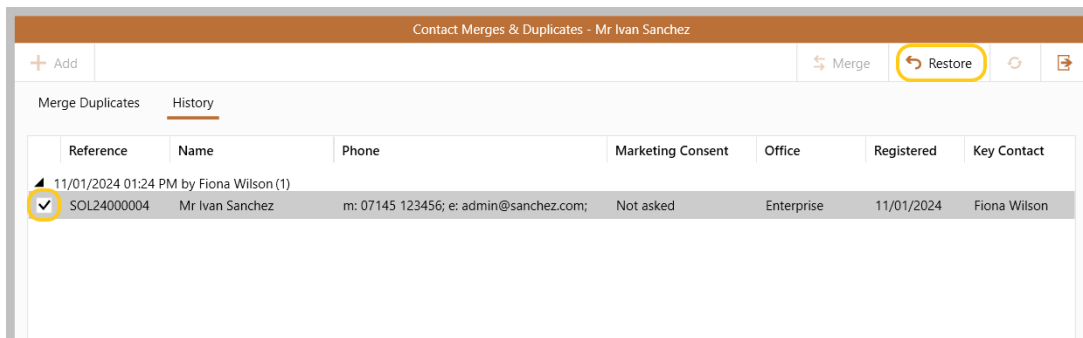
2. Restore contact records

From **Merges & Duplicates** screen:

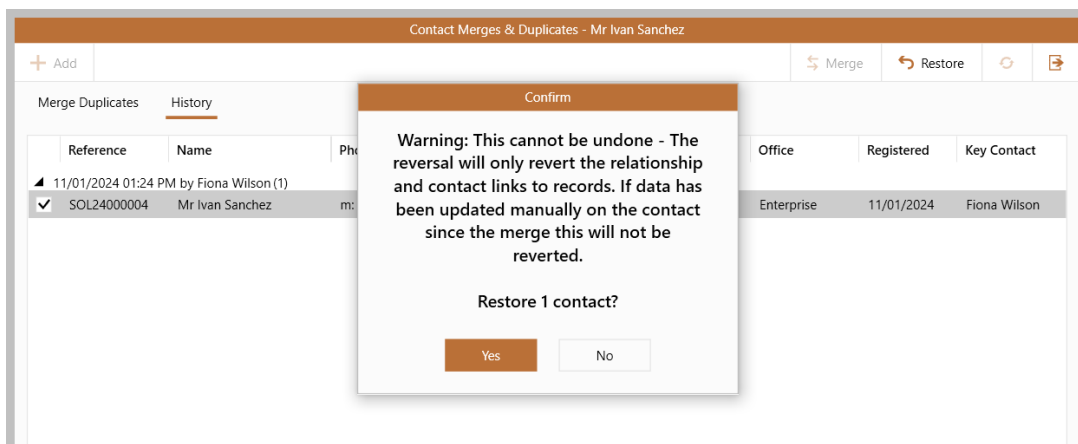
- Click **History** tab (top left)
This screen shows details of all archived contacts that have been merged with the selected contact
Double click an entry to view the archived contact



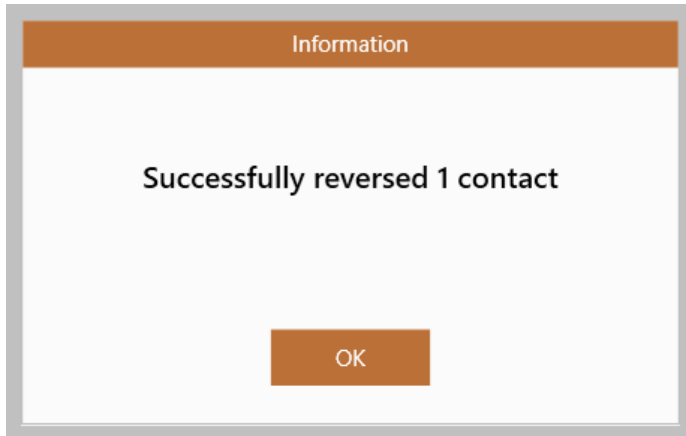
- Tick the box to the left of the contact record(s) to restore and click **Restore** (top right)



- Click **Yes** to proceed with the reversal

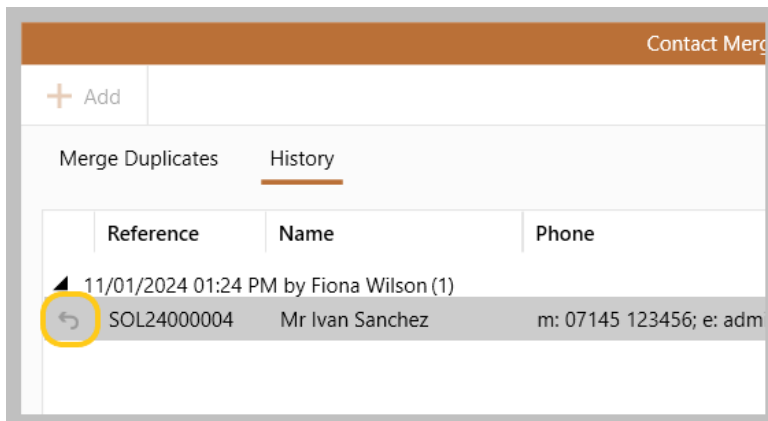


- Click **OK**

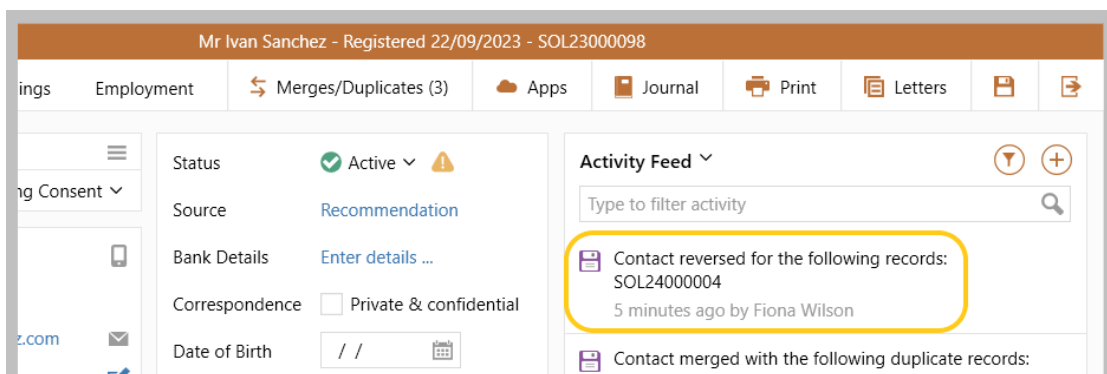


Any roles that were previously assigned to the contact are restored
 The contact record is taken out of the archive and is a separate active contact again

- The restored contact will continue to be shown on the **History** tab with an arrow icon to the left to indicate that the record has been restored



- This information is logged in the contact **Activity Feed** and also the contact **Journal, Detail Change** section



Instances where a contact cannot be merged

Merging cannot be carried out when the contact:
<ul style="list-style-type: none">• is marked as a legitimate duplicate
<ul style="list-style-type: none">• is a landlord and has:<ul style="list-style-type: none">• a current or arranging tenancy• any transactions• a finished tenancy with outstanding post tenancy checks• a property with outstanding works orders
<ul style="list-style-type: none">• is a tenant with:<ul style="list-style-type: none">• a current or an arranging tenancy• any transactions
<ul style="list-style-type: none">• is a lettings applicant with:<ul style="list-style-type: none">• an arranging tenancy• a pending offer
<ul style="list-style-type: none">• is a guarantor with a current or arranging tenancy
<ul style="list-style-type: none">• is a sales applicant with a pending or accepted offer <i>However, a sales applicant can be merged after the property status is set to Exchanged or Completed</i>
<ul style="list-style-type: none">• is a vendor with:<ul style="list-style-type: none">• a sales property that has outstanding sales invoices• any transactions• a sales property that has any of the following statuses: <i>For Sale, Under Offer, Reserved or Exchanged</i>
<ul style="list-style-type: none">• has one or more referrals that conflict with an existing referral
<ul style="list-style-type: none">• is a leaseholder with any transactions
<ul style="list-style-type: none">• has an offer with any transactions

Instances where a merged contact cannot be restored

Reverting a previously merged contact is not possible if any of the activities listed below have taken place since the contacts were merged

The activities in question that will prevent the contact merge to be reverted are listed and apply when the contact:

- is a landlord and has:
 - a current or arranging tenancy
 - any transactions
 - a finished tenancy with outstanding post tenancy checks
 - a property with outstanding works orders
- is a lettings applicant and has:
 - an arranging tenancy
 - a pending offer
- is a guarantor with a current or arranging tenancy
- is a sales applicant with a pending or accepted offer
However, a sales applicant can be reverted after the property status is set to Exchanged or Completed
- is a vendor and has:
 - a sales property that has outstanding sales invoices
 - any transactions
 - a sales property that has any of the following statuses: *For Sale, Under Offer, Reserved or Exchanged*
- has one or more referrals that conflict with an existing referral
- is a leaseholder with any transactions
- has an offer with any transactions