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

| Employ | yment | S Merges/Duplicates (1) | 📥 Apps | 📔 Journal | 🖶 Print | E Letters | | 3 | |
|--------|-----------|-------------------------|-------------------|------------------|-----------------|-------------------|-----------|----------|-------------------------|
| = | Status | 📀 Active 🗸 💧 | A | ctivity Feed ~ | | | | (+) | |
| sent 🗸 | Source | Select | uplicate contact: | At least one e-m | ail or phone nu | mber in this reco | ord has b | een foun | d in other contact reco |
| | Bank Deta | ils Enter details | E | Contact detai | ls changed fron | n m: 07894 1234 | 56: to | ^ | |

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 Sanch | nez - Registered 22/09/2 | .023 - SOL2 | 3000098 |
|----------|---------------------------|--------|----------------|--------------------------|-------------|--------------------------|
| Contact | Categories & Mailings | Employ | vment 🔄 Mer | ges/Duplicates (4) | 📥 Apps | 📔 Journal |
| Mr Ivar | n Sanchez | = | Status | 📀 Active 🗸 💧 | | Activity Feed ` |
| Identity | y Check 🛛 🛇 Marketing Con | sent 🗸 | Source | Recommendation | | Type to filter ac |
| Mobile | 07145 123456 | | Bank Details | Enter details | | Contact det |
| Home | Add | | Correspondence | Private & confider | ntial | e: admin@s 34 minutes |

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

| | | | Contact Merges & D | uplicates - Mr Ivan Sanchez | | | | | | | |
|----------------|-----------------|----------------------|--|------------------------------------|--------|--------|-----------|---------|----------------|---|---|
| Add | | | | | | | | 💲 Merge | 🥎 Restore | 0 | • |
| Aerge Duplicat | s History | | | | | | | | | | |
| Poforonce | Managor | Namo | Phone | Addrore | Activo | Ignore | Ignora Pa | con | Invalid Peacon | | |
| SOL24000 | 04 Fiona Wilson | Mr Ivan Sanchez | m: 07145 123456; e: admin@sanchez.com; | Address | Active | No | ignore ne | 15011 | invaliu Reason | | |
| SOL23000 | 97 Fiona Wilson | Mrs Harriet Ibbotson | e: admin@sanchez.com; | 17 Wayside, Birmingham | Active | No | | | | | |
| SOL23000 | 83 Fiona Wilson | Ms Gail Richards | e: admin@sanchez.com; | Birmingham, b21 | Active | No | | | | | |
| SOL23000 | 82 Fiona Wilson | Mr Marcus Telford | e: admin@sanchez.com; | 12 Blythe Gate, Blythe Valley Park | Active | No | | | | | |
| | | | | | | | | | | | |
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- 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)

| | | | (| Contact Merges & Duplicates - Mrs Sa | rah Burt | | | | | | | |
|-----------------|----------------|------------------|-----------------------------|--------------------------------------|----------|--------|---------------|------------------|-------------------|---------------------|-----------|---|
| - Add | | | | | | | | | 💲 Merge | 🕤 Restore | 0 | Ξ |
| ferge Duplicate | History | | | | | | | | | | | |
| Peferense | Managar | Name | Dhone | Address | Activo | Innere | Innera Reason | Invalid Reason | | | | 7 |
| SOL 230000 | 5 Fiona Wilson | Mr Adam Burt | m: 07894 123456; e: burts@e | 145 New Coventry Road, Birming | Active | Ignore | Ignore keason | Vendor of a pron | orty with a state | is of For Sale 1 In | lar Offar | |
| 501250000 | | Hill Additt Durc | ni. 07034 123430, c. burbee | 145 New Covena y Noud, Diminig | Active | 140 | | vendor or a prop | erty with a stati | a off of Jule, off | ier oner | 2 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | - |

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**

| Ignore (| duplicate contact | |
|-------------------------|--------------------|--------|
| Reason fo | or duplicate conta | oct |
| Mr & Mrs Burt use the s | ame email and n | nobile |
| | Cancel | Accept |

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

| s Employment 💲 Merges/Duplicates (1) 🌰 Apps 📔 Journal 🏼 | 🖶 Print | E Letters |
|--|------------|----------------|
| Status Active ~ Activity Feed ~ Source Select Duplicate reason: Mr & Mrs Burt use th | ie same em | ail and mobile |

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

| 1ailings Emplo | oyment | S Merges/Duplicates | le Apps | 📔 Journal | 🖶 Print | E Letters | | E |
|-----------------|------------|---------------------|---------|--|---------|-----------|---|----|
| = | Status | 🛇 Active 🗸 💧 | | Activity Feed 🎽 | | | • | + |
| eting Consent 🗸 | Source | Select | | Type to filter acti | vity | | | Q, |
| 6 | Bank Detai | Is Enter details | ential | Duplicate phone and email searching for this contact has ignored with reason : Mr & Mrs Bu | | | | ^ |

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)

| | | Mrs Sar | ah Burt - Registered 18/(| 09/2023 - SOL230 | 00064 | |
|---------------|--------|--------------|---------------------------|------------------|----------------------------|-----------|
| s & Mailings | Employ | /ment | | 📥 Apps | 📔 Journal | 🖶 P |
| | = | Status | 🛇 Active 🗸 🕼 | | Activity Feed | |
| Marketing Con | sent 🗸 | Source | Select | Re-evaluate d | uplicate(s) _{cti} | ivity |
| 23456 | | Bank Details | s Enter details | ß | Duplicate pho | one and e |

• Click Yes

| Con | firm |
|---------------------------------|------------------------------------|
| Cancel the previou ignore du | sly given reason to plicate(s)? |
| Yes | No |

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

| | | | Mrs Saran B | urt - Registered 18/09/ | 2023 - SOL2: | 3000064 | | | | <u> </u> |
|----------|-----------------------|---------|----------------|-------------------------|--------------|----------------------|-----------------|-------------------|---|----------|
| Contact | Categories & Mailings | Employ | yment 💲 Me | erges/Duplicates (1) | le Apps | 📔 Journal | 🖶 Print | E Letters | 8 | [|
| Mrs Sara | h Burt | = | Status | 🛇 Active 🗸 💧 | | Activity Feed 🗡 | | | | $(\pm$ |
| Identity | Check 🤡 Marketing Cor | nsent 🗸 | Source | Select | | Type to filter activ | /ity | | | Q, |
| Mobile | 07894 123456 | | Bank Details | Enter details | | Removed the | ignoring of du | olicate phone and | | ^ |
| Home | Add | | Correspondence | Private & confid | ential | A moment ag | o by Fiona Wils | on | | |
| E-mail | burts@email.com | \sim | Data of Birth | / / | | | | | | |

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**

| | s po | tentia | duplicates | | | | |
|------------------------|----------------------|----------|---|------------------------|---|---|-------------------|
| On contac | ct re | cord: | | | | | |
| Click | Mer | ges/D | uplicates | | | | |
| | | | | | Mr Ivan Sancl | hez - Registered 22/09/2023 - | SOL23000098 |
| C | Conta | ict | Categories & Mailings | Employ | ment 🗲 Me | erges/Duplicates (4) 🛛 🔺 A | Apps 📔 Journal |
| N | ٨r | lvan | Sanchez | = | Status | 🛇 Active 🗸 💧 | Activity Feed ~ |
| • | ld | entity C | heck 🛛 🛇 Marketing Con | sent ∽ | Source | Recommendation | Type to filter ac |
| Ν | Mobi | le | 07145 123456 | | Bank Details | Enter details | Contact deta |
| ŀ | Home | 9 | Add | | Correspondence | Private & confidential | 34 minutes a |
| The N This s | Home Merg scre | en sho | Add Duplicates screen is wws details of all activ | s display ve duplic | Correspondence ed (shown in the ates for the sele | e Private & confidential e next step) ected contact | 34 minute |

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)

| Add | | | | S Merge | Restore | 0 |
|-----------------|--------------|----------------------|----------------------------|------------------------------------|---------|--------|
| erge Duplicates | History | | | | | |
| Reference | Manager | Name | Phone | Address | Active | Ignore |
| SOL24000004 | Fiona Wilson | Mr Ivan Sanchez | m: 07145 123456; e: admin@ | | 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 |
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• Click Yes to proceed with the merge

| Reference Manager Name Confirm Active Ignor SOL2400004 Fiona Wilson Mr Ivan Warning: This cannot be undone. Birmingham Active No SOL23000037 Fiona Wilson Mrs Har Are you sure you want to merge 1 No Birmingham Active No SOL23000082 Fiona Wilson Mr Marc Are you sure you want to merge 1 No | Reference Manager Name Confirm Active Ignore SOL2400004 Fiona Wilson Mr Ivan Warning: This cannot be undone. Birmingham Active No SOL23000083 Fiona Wilson Mr Sail Are you sure you want to merge 1 contact into Mr Ivan Sanchez? birmingham Active No Yes No Yes No Active No No | Me | rge Duplicates | History | | | | | | |
|---|--|--------|----------------|--------------|---------|----------------------------------|-------------------------|--------|------|---|
| Image: Manage: Manage: Manage: Manage: Manage: Manage: Mathe Math Math Math Mathe | Image: Maring: Name Active No Image: SOL24000004 Fiona Wilson Mr Ivan Maring: This cannot be undone. Birmingham Active No Image: SOL23000097 Fiona Wilson Mrs Har Are you sure you want to merge 1 Birmingham Active No Image: SOL23000082 Fiona Wilson Mr Marc Yes No No | | Poforonco | Managor | Namo | Confirm | - | Activo | Igno | |
| Warning: This cannot be undone. SOL23000097 Fiona Wilson Mrs Har SOL23000083 Fiona Wilson Mr Gail SOL23000082 Fiona Wilson Mr Marc Yes No Yes No 4 Validated | Warning: This cannot be undone. SOL23000097 Fiona Wilson Mrs Har SOL23000082 Fiona Wilson Mr Marc Ves No Ves No Ves Ves Vo Validated | ~ | SOI 24000004 | Fiona Wilson | Mr Ivan | | | Active | No | e |
| SOL23000083 Fiona Wilson Ms Gail Are you sure you want to merge 1 h. b21 Active No SOL23000082 Fiona Wilson Mr Marc Yes No Active No Yes No Ves No Ves No Ves | SOL23000083 Fiona Wilson Ms Gail SOL23000082 Fiona Wilson Mr Marc Yes No Validated | | SOL23000097 | Fiona Wilson | Mrs Har | Warning: This cannot be undone. | , Birmingham | Active | No | |
| SOL23000082 Fiona Wilson Mr Marc contact into Mr Ivan Sanchez? ate, Blythe Valley Park Active No Yes No 4 Validated | SOL23000082 Fiona Wilson Mr Marc Contact into Mr Ivan Sanchez? Ves No Ves No Validated | | SOL23000083 | Fiona Wilson | Ms Gail | Are you sure you want to merge 1 | n, b21 | Active | No | |
| Ves No A Validated | Ves No Ves No Validated | | SOL23000082 | Fiona Wilson | Mr Marc | contact into Mr Ivan Sanchez? | ate, Blythe Valley Park | Active | No | |
| 4 Validated | 4 Validated | < | | | | Yes No | _ | | | |
| | | 4 Vali | dated | | _ | | | | | |

| Click OK | |
|-------------------------------|---|
| Information | • |
| Successfully merged 1 contact | |
| ОК | |
| | |

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

| | | | Mr Ivan Sanch | hez - Registered 22/09 | /2023 - SOL23 | 3000098 | | | | |
|----------|------------------------|--------|----------------|------------------------|---------------|----------------------|------------------|-----------------|----------|----------|
| Contact | Categories & Mailings | Employ | /ment 🗧 Me | rges/Duplicates (3) | 📥 Apps | Journal | 🖶 Print | E Letters | 8 | ₽ |
| Mr Ivan | Sanchez | = | Status | 🛇 Active 🗸 💧 | | Activity Feed 🎽 | | | | (+) |
| Identity | Check 🤡 Marketing Cons | ent 🗸 | Source | Recommendation | | Type to filter activ | vity | | | Q, |
| Mobile | 07145 123456 | | Bank Details | Enter details | (I | Contact merg | ed with the foll | owing duplicate | records: | ١. |
| Home | Add | | Correspondence | Private & confid | ential | 2 minutes ago | by Fiona Wils | on | | J |
| E-mail | admin@sanchez.com | \sim | Date of Birth | | | | | 07445 400 4 | · c . | _ |

3. Merge history

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

| Add S Merge Merge Merge Merge Merge Duplicates History Reference Name Phone Marketing Consent Office Registered Key Contact 11/01/2024 01:24 PM by Fiona Wilson (1) SOL24000004 Mr Ivan Sanchez m: 07145 123456; e: admin@sanchez.com; Not asked Enterprise 11/01/2024 Fiona Wilson | | | Contact Merges & Duplicates - M | r Ivan Sanchez | | | |
|---|--------------------|------------------------|--|-------------------|----------------|------------------|--------------|
| Merge Duplicates History Reference Name Phone Marketing Consent Office Registered Key Contact 11/01/2024 01:24 PM by Fiona Wilson (1) | - Add | | | | ≒ Merge | S Restore | • • • |
| Reference Name Phone Marketing Consent Office Registered Key Contact 11/01/2024 01:24 PM by Fiona Wilson (1) 50L24000004 Mr Ivan Sanchez m: 07145 123456; e: admin@sanchez.com; Not asked Enterprise 11/01/2024 Fiona Wilson | Merge Duplicates | History | | | | | |
| 11/01/2024 01:24 PM by Fiona Wilson (1) SOL24000004 Mr Ivan Sanchez m: 07145 123456; e: admin@sanchez.com; Not asked Enterprise 11/01/2024 | Reference | Name | Phone | Marketing Consent | Office | Registered | Key Contact |
| SOL24000004 Mr Ivan Sanchez m: 07145 123456; e: admin@sanchez.com; Not asked Enterprise 11/01/2024 Fiona Wilso | 11/01/2024 01:24 F | PM by Fiona Wilson (1) | | | | | |
| | SOL24000004 | Mr Ivan Sanchez | m: 07145 123456; e: admin@sanchez.com; | Not asked | Enterprise | 11/01/2024 | Fiona Wilson |
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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**

| cess previo | ously merged contac | t recor | d(s) | | |
|----------------|------------------------|---------|----------------|---------------------------------|------------------------------------|
| contact record | d: | | | | |
| Click Merges | s/Duplicates | | | | |
| | | | Mr Ivan Sanc | hez - Registered 22/09/2023 - S | OL23000098 |
| Contact | Categories & Mailings | Employ | vment 🔄 Me | rges/Duplicates (3) 🛛 🖕 Ap | ps 📔 Journal 📑 |
| Mr Ivan | Sanchez | = | Status | 🛇 Active 🗸 💧 | Activity Feed 🗡 |
| Identity | Check 🥑 Marketing Cons | sent 🗸 | Source | Recommendation | Type to filter activity |
| Mobile | 07145 123456 | | Bank Details | Enter details | Contact merged wit |
| Home | Add | | Correspondence | Private & confidential | SOL24000004 1 hour ago by Fiona |
| E-mail | admin@sanchez.com | \sim | Date of Pirth | | |

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

| | | Contact Merges & Duplicates - M | r Ivan Sanchez | | | |
|----------------------|------------------------|--|-------------------|------------|------------|--------------|
| + Add | | | | 🖕 Merge | 🕤 Restore | • • • |
| Merge Duplicates | History | | | | | |
| Reference | Name | Phone | Marketing Consent | Office | Registered | Key Contact |
| ▲ 11/01/2024 01:24 F | PM by Fiona Wilson (1) | | | | | |
| SOL24000004 | Mr Ivan Sanchez | m: 07145 123456; e: admin@sanchez.com; | Not asked | Enterprise | 11/01/2024 | Fiona Wilson |
| | | | | | | |
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• Tick the box to the left of the contact record(s) to restore and click **Restore** (top right)

| | | Contact Merges & Duplicates - M | 1r Ivan Sanchez | | | |
|------------------|------------------------|--|-------------------|----------------|------------|--------------|
| + Add | | | | \$ Merg | e (5 Resto | ore 😔 📑 |
| Merge Duplicates | History | | | | | |
| Reference | Name | Phone | Marketing Consent | Office | Registered | Key Contact |
| 11/01/2024 01:24 | PM by Fiona Wilson (1) | | | | | |
| SOL24000004 | Mr Ivan Sanchez | m: 07145 123456; e: admin@sanchez.com; | Not asked | Enterprise | 11/01/2024 | Fiona Wilson |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Click Yes to proceed with the reversal

| | | Warning: This cannot be undone - The | | | |
|---|-----|--|------------|--------------|-------------|
| Reference Name | Pho | reversal will only revert the relationship | Office | Registered | Key Contact |
| SOL24000004 Mr Ivan Sanchez m: been updated manually on the contact | | Enterprise | 11/01/2024 | Fiona Wilsor | |
| | | since the merge this will not be | | | |
| | | levelted. | | | |
| | | Restore 1 contact? | | | |
| | | Yes No | | | |
| | | | | | |
| | | | | | |

| Information | |
|---|---|
| Successfully reversed 1 contac | ct |
| ОК | |
| roles that were previously assigned to the contact a | are restored |
| | soparate active contact again |
| The restored contact will continue to be shown on the record has been restored | the History tab with an arrow icon to the left to in |
| | |
| | Contact Merc |
| + Add | |
| Merge Duplicates History | |
| Reference Name | Phone |
| | none |
| SOL24000004 Mr Ivan Sanchez | m: 07145 123456: e: adm |
| | |
| | |
| This information is logged in the contact Activity | Freed and also the contrast levymet. Detail Chang |
| section | eed and also the contact Journal, Detail Chang |
| Melvan Canchez - Repistered 32/00/2022 | COL 2200000 |
| ings Employment Serves/Duplicates (3) | nns lournal 🚍 Print 🕞 Letters 🗎 |
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| E Status O Active ~ A | Activity Feed ~ |
| Imposition Imposition </td <td>Activity Feed ~ ()</td> | Activity Feed ~ () |
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| Impose Employment Impose Support of Suppo | Activity Feed ~ () Type to filter activity Q Contact reversed for the following records: SOL24000004 5 minutes ago by Fiona Wilson |
| Imployment → merges/supreties (s) → merges/supreties (s) Imployment Status ◇ Active ∨ ▲ Imployment ∨ Source Recommendation Imployment ∨ Bank Details Enter details Correspondence Private & confidential | Activity Feed > Type to filter activity Contact reversed for the following records: SOL24000004 S minutes ago by Fiona Wilson |

Instances where a contact cannot be merged

| Merging cannot be carried out when the contact: |
|--|
| is marked as a legitimate duplicate |
| 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 tenant with: a current or an arranging tenancy any transactions |
| is a lettings applicant with: 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 merged after the property status is set to Exchanged or Completed |
| is a vendor with: 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 |

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 |