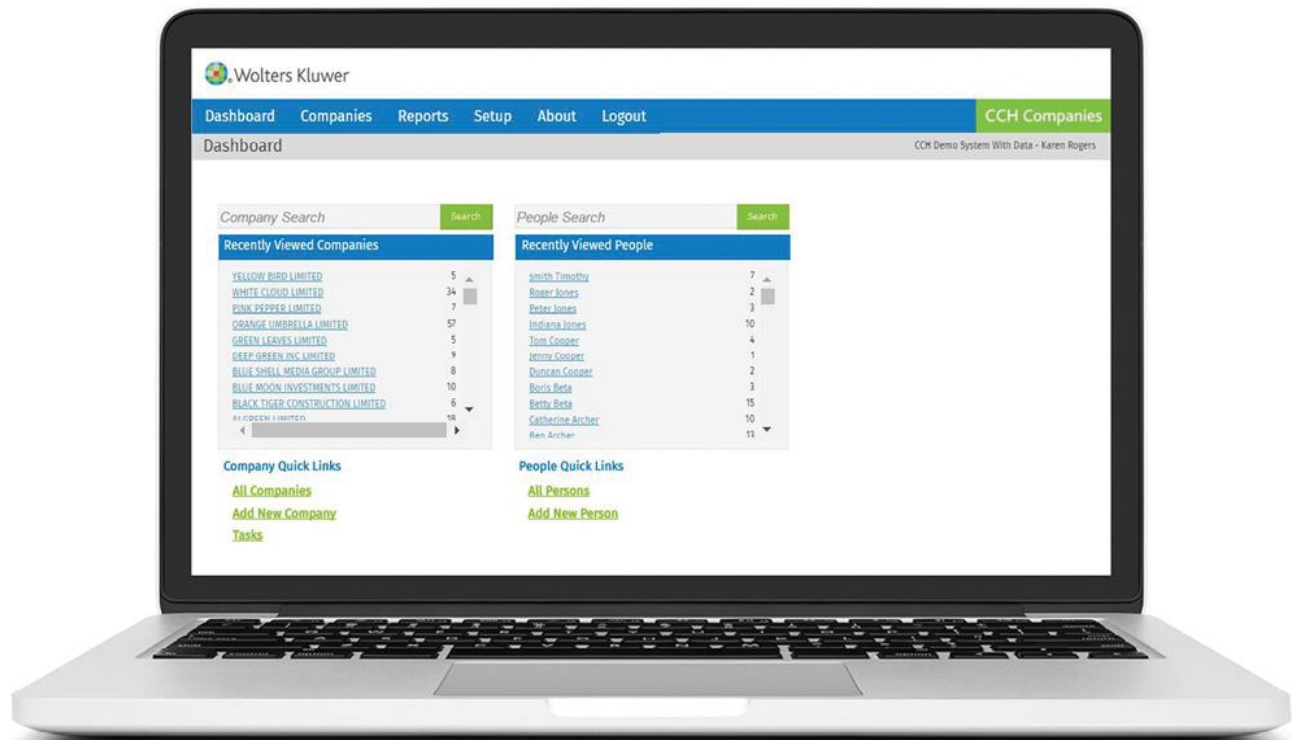




## Keep track of all your clients' New Zealand company information



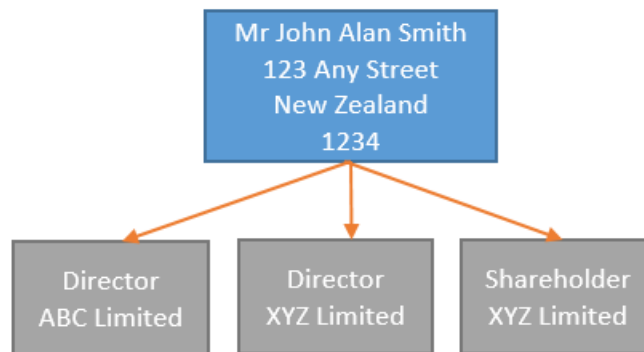
Manage, Comply, Communicate - CCH Companies

## CCH Companies: Duplicate People

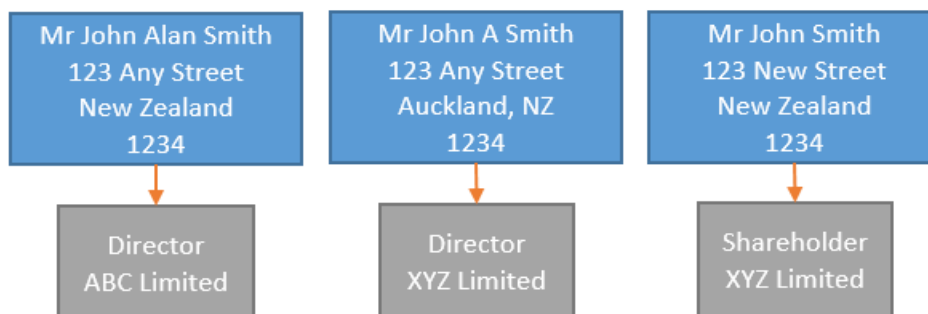
This guide will help you to understand why you may have duplicate people records in CCH Companies and what you should do about it.

### NZCO data v CCH Companies

**CCH Companies** has a single person record linked to multiple companies. This means you can see all company connections for an individual and, if name or address details change, you only need to update 1 record.



**NZCO** create a new person record for each company. If name and address details change you need to find and change information in multiple places. This means that discrepancies can occur and the same person could have different names and addresses for each of their companies.



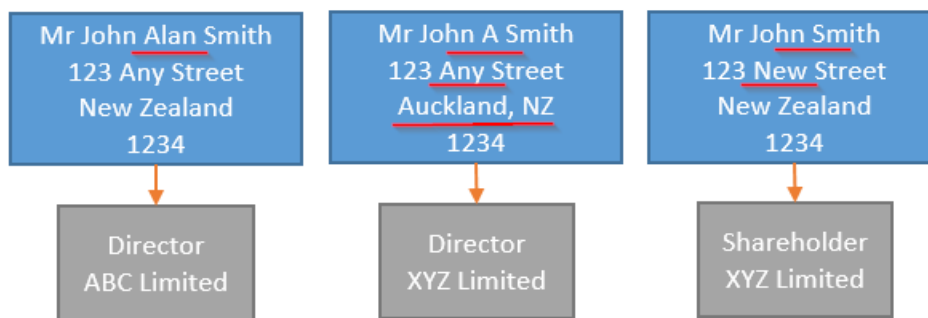
### NZCO Import

When data is imported from NZCO to CCH Companies we can recognize and combine records for the same person.

This will only work if all details are the same.

Where details are not the same a duplicate person will be created in your CCH Companies database.

In this example, 3 person records would be created due to the differences in name format and address.



Common sense tells us that this is probably the same person but, unfortunately, automated import routines are not known for their common sense!

### How to find potential duplicates

On the dashboard go to **ALL PEOPLE**. Any duplicates are usually fairly obvious in this list.

Use the small blue arrow to export the information into Excel. If your database is large it can help to use the additional tools in Excel to sort and find potential duplicates.

Wolters Kluwer

Dashboard Reports Setup About Logout CCH Companies and CCH iTrust

People Listing CCH Demonstration Limited - Karen Rogers

Last Name	First Names	Postal Address	Home Phone	Email Address	Ext. No.
<b>ADAMS</b>	<b>Paul</b>	<b>53 Barlow Road, Chatswood, Auckland</b>			
ADAMS	Paul Edward	53 Barlow Road, Auckland			
ALEXANDER	Cameron				
ALLAN	Christopher			skhardy01@gmail	
ALLOWAY	Robert				
ANDERSON	Malcolm				
ANDERSON	Daryl William James				
ANGELL	John				
ANGELL	John Stephen				
ANWAR	Mohammed Talib				
Archer	Ben			Suzy.Hardy@wolt	

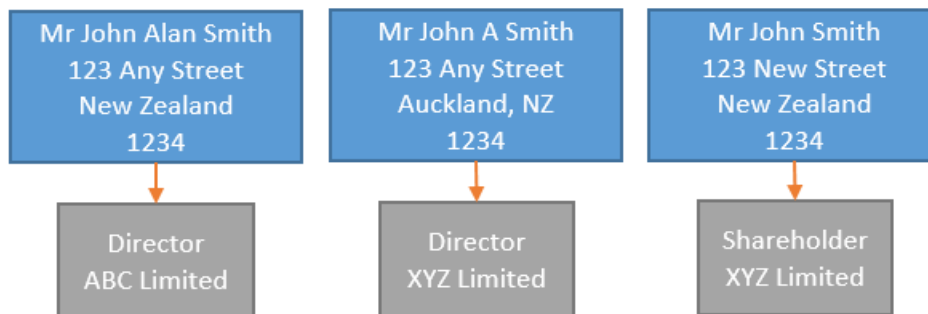
## What to do next

There may be a little detective work required particularly if the name is the same but the address differs.

Once you are certain which record is correct you will need to:

1. Link all companies to the correct person record
2. Inform NZCO of the changes you have made

In our example let's assume the first name and address are correct.



1. Open **XYZ Limited**
  2. Go to **DIRECTORS**, select **ADD** and find the first record (Mr John Alan Smith). Add him as a director.
  3. **DELETE** the second record (Mr John A Smith)
  4. Inform NZCO that the director details for XYZ Limited should be updated.
- 
1. Open **XYZ Limited**
  2. Go to **SHAREHOLDERS** and highlight the third record (Mr John Smith)
  3. Select **MODIFY**, then **MODIFY** again in the next screen. Select the first record (Mr John Alan Smith) and **SAVE**.
  4. Inform NZCO that the shareholder details for XYZ Limited should be updated.

Now that Mr John A Smith and Mr John Smith are not linked to any companies you should be able to delete them from the database.