



## Holder Clean-Up Walkthrough

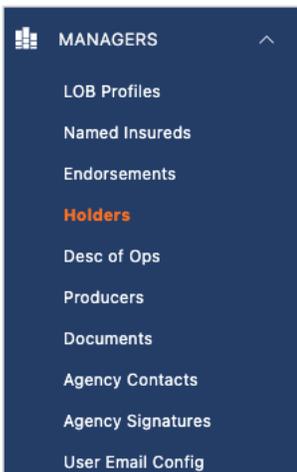
The Holder Clean-Up feature allows you to merge holder entries and address records together, ensuring cleaner, more accurate data.

This is helpful in cases where small variations in naming or address formatting create multiple records for what should really be a single entry.

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### Holder Merge Flow

Within the left-hand navigation menu, select “Holders” from the “Managers” dropdown.



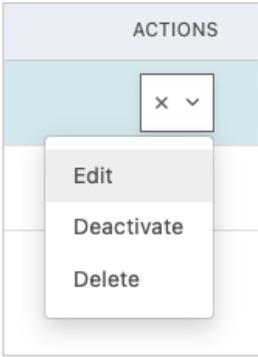
This will take you to the Holders Manager, where you can scroll through the list, or search for the Holder(s) you would like to merge.

Manager: Holders

Search: northfield FILTER TOGGLE COLUMNS ACTIONS

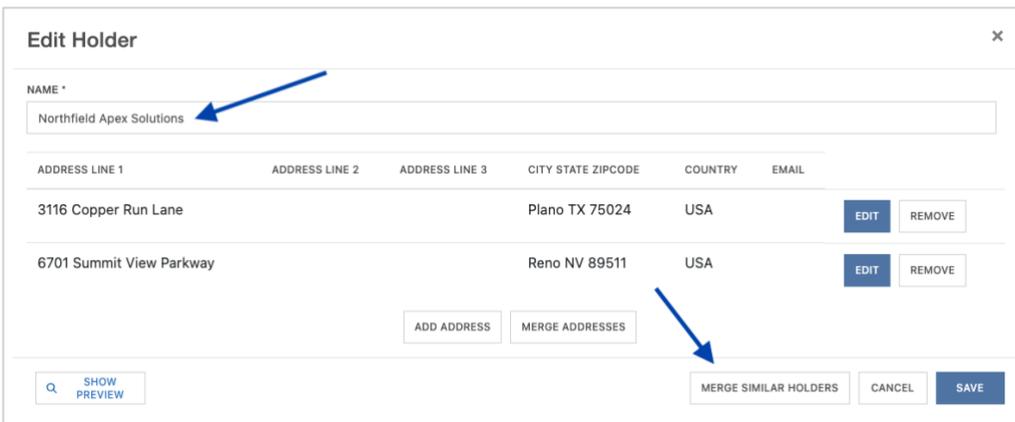
	NAME	PRIMARY ADDRESS	# OF ADDRESSES	STATUS	ACTIONS
<input type="checkbox"/>	Northfield Apex Solutions Inc	3116 Cooper Run Lane Plano, TX 75024	1	ACTIVE	...
<input type="checkbox"/>	Northfield Apex Solutions	3116 Copper Run Lane Plano, TX 75024	2	ACTIVE	...
<input type="checkbox"/>	Northfield Apex Solutions LLC	1457 Willow Crest Drive Boulder, CO 80302	5	ACTIVE	...

Within the “Actions” menu for any one of our selections, select to “Edit” the entry.



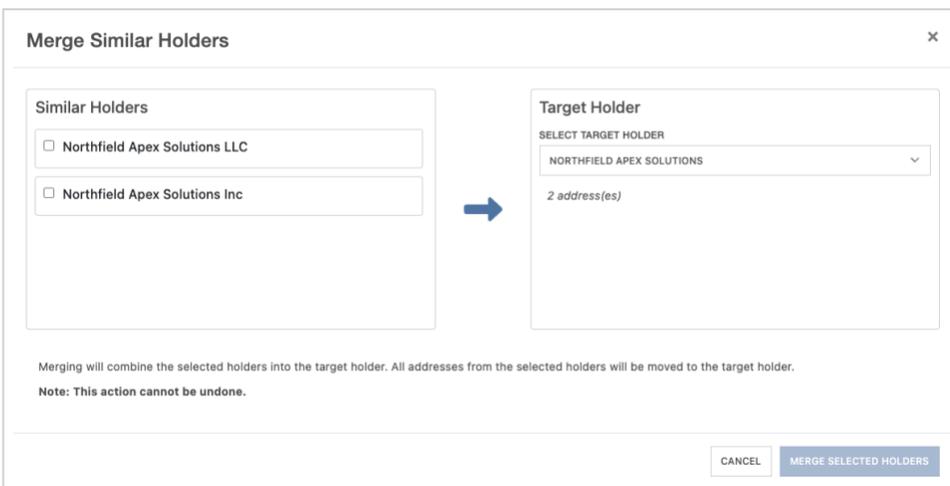
At the top of the “Edit Holder” screen you can confirm the entry you are in.

When you are ready to combine similar Holder entries, select “Merge Similar Holders”.



Within the Holder Merge menu, on the left you can see a list of similar holder entities available to merge into a single Holder entry.

On the right you will have a list of Holder entries you can select to merge these into.



Select any holder records on the left you wish to merge into a single entry – this will also merge in their addresses.

Then choose the primary holder on the right to merge these selections into.

When you are ready to complete the Holder merge, click “Merge Selected Holders”.

### Merge Similar Holders ✕

#### Similar Holders

- Northfield Apex Solutions LLC
- Northfield Apex Solutions Inc

#### Target Holder

SELECT TARGET HOLDER

NORTHFIELD APEX SOLUTIONS ▾

2 address(es)

Merging will combine the selected holders into the target holder. All addresses from the selected holders will be moved to the target holder. 

**Note: This action cannot be undone.**

You will be brought back to your Holder Manager where you will now see all selected holders – along with their associated addresses – consolidated into a single holder record.

### Manager: Holders ⊕

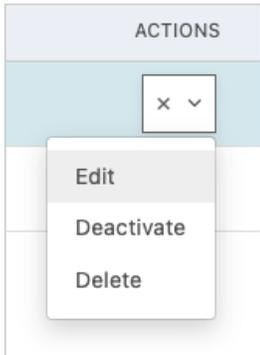
Search: northfield FILTER ▾ TOGGLE COLUMNS ▾ ACTIONS ▾

	NAME	PRIMARY ADDRESS	# OF ADDRESSES	STATUS	ACTIONS
<input type="checkbox"/>	Northfield Apex Solutions	1457 Willow Crest Drive Boulder, CO 80302	8 	ACTIVE	...

## Holder Address Merge Flow

In addition to merging holder records, Holder Clean-Up also allows you to merge duplicate addresses.

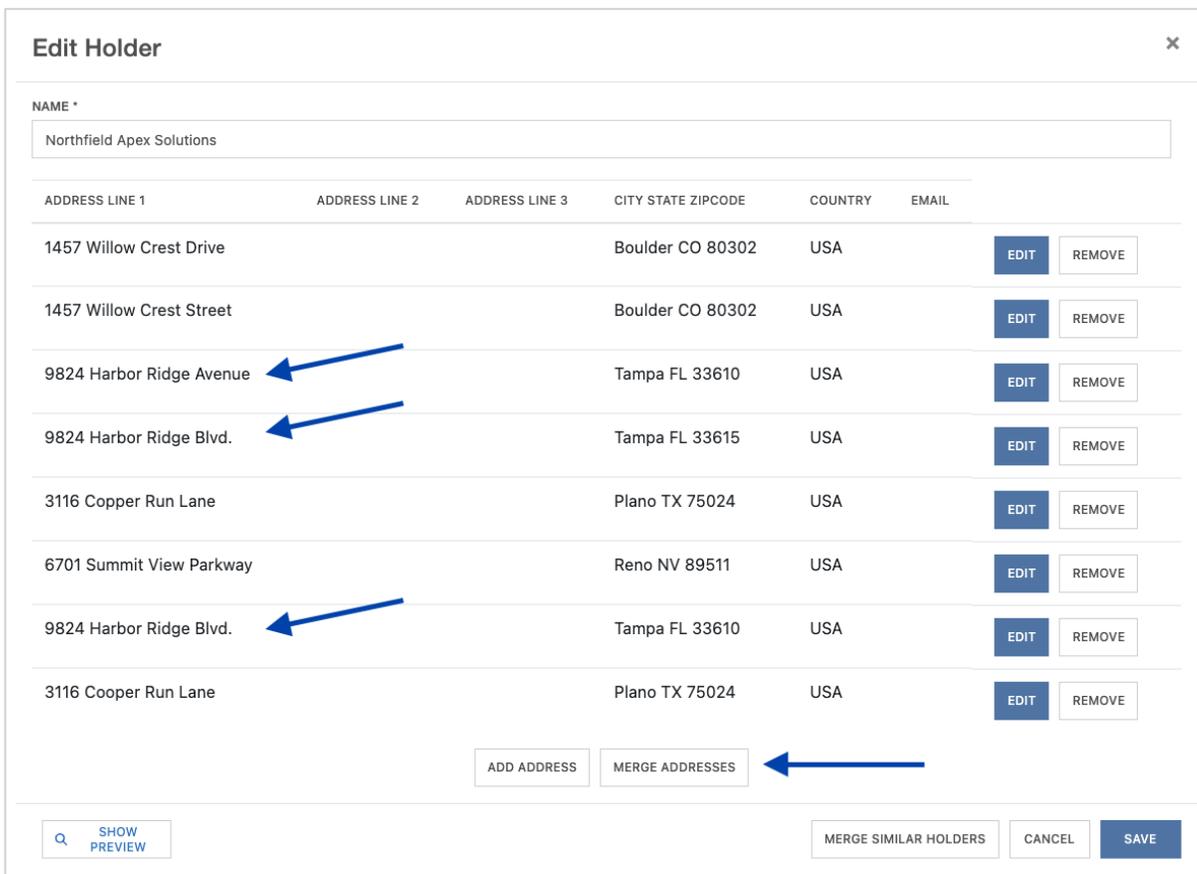
Within the “Actions” menu for any one of our selections, select to “Edit” the entry.



Within the “Edit Holder” screen you can see a list of the addresses available for use on a certificate.

In this example you can see variations of the same address for 9824 Harbor Ridge.

To merge these similar entries into one, you will start the merge process by clicking “Merge Addresses”.



**Edit Holder** ✕

NAME \*

Northfield Apex Solutions

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	EMAIL
1457 Willow Crest Drive			Boulder CO 80302	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
1457 Willow Crest Street			Boulder CO 80302	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
9824 Harbor Ridge Avenue			Tampa FL 33610	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
9824 Harbor Ridge Blvd.			Tampa FL 33615	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
3116 Copper Run Lane			Plano TX 75024	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
6701 Summit View Parkway			Reno NV 89511	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
9824 Harbor Ridge Blvd.			Tampa FL 33610	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>
3116 Cooper Run Lane			Plano TX 75024	USA	<a href="#">EDIT</a> <a href="#">REMOVE</a>

[ADD ADDRESS](#) [MERGE ADDRESSES](#)

[SHOW PREVIEW](#) [MERGE SIMILAR HOLDERS](#) [CANCEL](#) [SAVE](#)

Within the left-hand list of addresses, you will see a list of all similar entries to merge.

On the right, you see the fields indicating the address fields the selected addresses will merge into.

**Merge Addresses** [X]

**Addresses**

- 1457 Willow Crest Drive  
Boulder CO 80302  
USA
- 1457 Willow Crest Street  
Boulder CO 80302  
USA
- 9824 Harbor Ridge Avenue  
Tampa FL 33610  
USA
- 9824 Harbor Ridge Blvd.

→

**Merged Address**

ADDRESS LINE 1  
[ ]

ADDRESS LINE 2  
[ ]

ADDRESS LINE 3  
[ ]

CITY  
[ ]

COUNTRY  
USA [v]

Merging will combine the selected addresses into a new address. The selected addresses will be removed.  
Note: This action cannot be undone.

[CANCEL] [MERGE]

Select the addresses you would like to merge into one entry.

On the right, confirm the address information the selected entries will merge into.

When you are ready to complete the address merge, click “Merge”.

**Merge Addresses** [X]

**Addresses**

- Boulder CO 80302  
USA
- 9824 Harbor Ridge Avenue  
Tampa FL 33610  
USA
- 9824 Harbor Ridge Blvd.  
Tampa FL 33615  
USA
- 3116 Copper Run Lane  
Plano TX 75024  
USA

→

**Merged Address**

ADDRESS LINE 1  
9824 Harbor Ridge Boulevard

ADDRESS LINE 2  
[ ]

ADDRESS LINE 3  
[ ]

CITY  
Tampa

COUNTRY  
USA [v]

Merging will combine the selected addresses into a new address. The selected addresses will be removed.  
Note: This action cannot be undone.

[CANCEL] [MERGE]

You will be brought back to the editor where you can now see the single address entry for 9824 Harbor Ridge Boulevard.

When you are ready to save the changes to the Holder, click “Save”.

### Edit Holder ✕

NAME \*

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	EMAIL
1457 Willow Crest Drive			Boulder CO 80302	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>
9824 Harbor Ridge Boulevard			Tampa FL 33610	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>
3116 Copper Run Lane			Plano TX 75024	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>
6701 Summit View Parkway			Reno NV 89511	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>
123 Main Street			Sydney 2000	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>

This will bring you back to the Holder Manager – where you will see the single Holder entry, with the updated combined address count.

### Manager: Holders ⓘ

Search: Northfield

	NAME	PRIMARY ADDRESS	# OF ADDRESSES	STATUS	ACTIONS
<input type="checkbox"/>	Northfield Apex Solutions	1457 Willow Crest Drive Boulder, CO 80302	6	ACTIVE	...