

Add a person to the directory

Create a record with the necessary data and check for duplicates before saving.

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Before you begin

- ✓ Collect only necessary and authorised data.
- ✓ Search for the person in the People directory tab first.

1 STEP 1 OF 4 · 2 MIN

Open People

From the dashboard open People and select the Directory tab.

Directory is the reference list for people recorded in the active workspace.

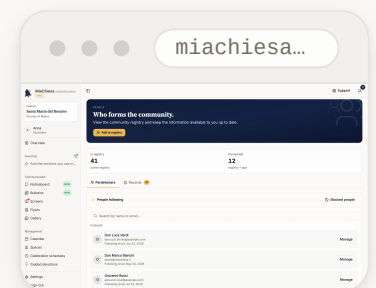


Fig. 1 From the dashboard open People and select the Directory tab.

2 STEP 2 OF 4 · 2 MIN

Search for the person

Use Search by name, email or phone before creating a record.

If search finds the person, open that record instead of creating a duplicate.

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STEP 3 OF 4 · 2 MIN

Select Add to registry

Open Add a record and fill in fields marked with an asterisk.

Fields marked with an asterisk must be complete; enter email and phone only in their dedicated fields.

Fig. 2 The Add a record form with required fields marked by an asterisk.

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STEP 4 OF 4 · 2 MIN

Review and save

Review Main information, Contact details, relationships and authorised additional fields, then save.

After saving, search again and confirm that one record appears with the correct contact details.

Fig. 3 The demo shows the saved record; Edit reopens the details for corrections.

What you have achieved

- ✓ The person has a single directory record.
- ✓ Essential data is available to authorised users.

Troubleshooting

A possible duplicate appears

Stop creation and compare the existing record.



Add to registry is missing

You need Manage records access in the active scope.

