

Link people in the same family

Attach an existing record to a household without duplicating the directory entry or granting implicit account access.

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Before you begin

- ✓ You need Manage records access in the person's workspace.
- ✓ Confirm that both people already have records and that the correct household exists.

1

STEP 1 OF 4 · 1-2 MIN

Open the reference record

From People → Records, open someone who already belongs to the household. The record exposes details, family, privacy and other permitted sections.

The household is a directory grouping. Linking does not automatically grant account access or responsibility for someone's data.

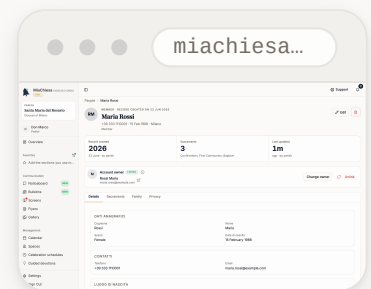


Fig. 1 A person already in the household provides the starting point.

2

STEP 2 OF 4 · 1-2 MIN

Review the household

Open Family and check the household name and current members. Do not rely on a matching household name without comparing its members.

If the starting person has no household, create one or attach them to an existing household before adding members.

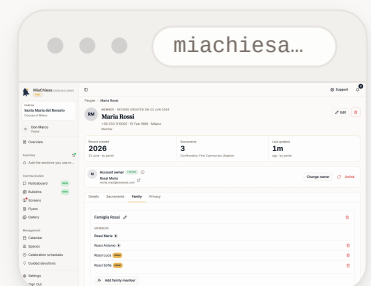


Fig. 2 Review the household before opening the add-member flow.

3

STEP 3 OF 4 · 1-2 MIN

Search for an existing record

Select Add family member and search existing records. People already in the same household are excluded; a person in another household is marked and cannot be attached from this list.

The capture searches for Vincenzo but does not select him, so the link is prepared and unsaved.

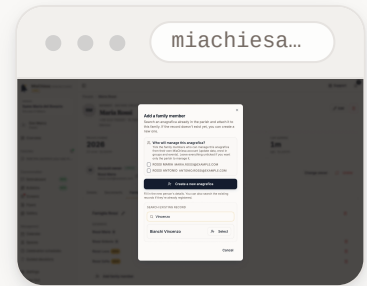


Fig. 3 The dialog is open and filtered; no family member has been linked in the capture.

4

STEP 4 OF 4 · 1-2 MIN

Attach only after checking

Compare the matching record and press Select only when both identity and household are correct. Attaching an existing record does not create a new person.

The manager picker belongs to the create-new-record path. Attaching an existing record does not silently grant management permissions.

What you have achieved

- ✓ You identified the household and existing record to attach.
- ✓ The tutorial separates household membership from account access.

Troubleshooting

The person is shown in another household



Do not force the link. Open their record and change the household only after checking the data.

I cannot find the person



Close the dialog, search the full list and create a record only if one does not already exist.