

How to Add New Contact Types in your DMS

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Donor Management System

The Donor Management System comes preloaded with **3 basic Contact Types**: Individual, Organization, and Household (legacy feature). But, from these basic types, you can create additional Contact Types to further differentiate your Contacts, such as *Student*, *Parent*, *Staff* and more.

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Creating a New Contact Type

1. From your Main Menu, visit your *administrative Settings*

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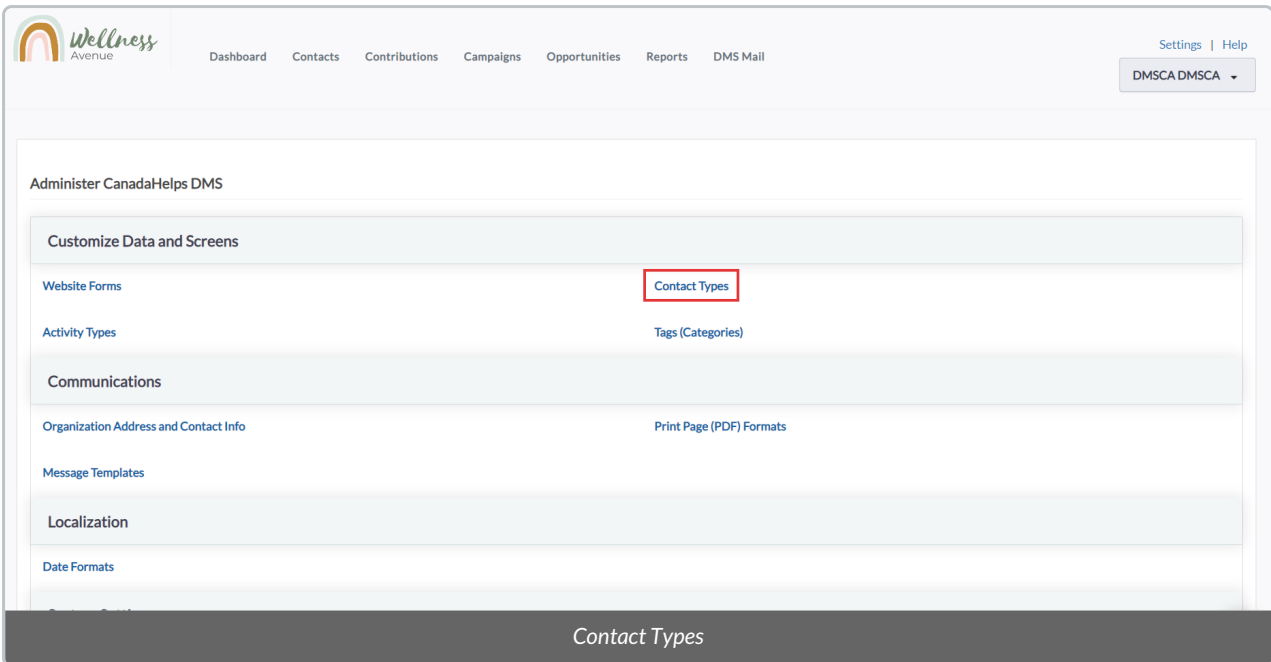
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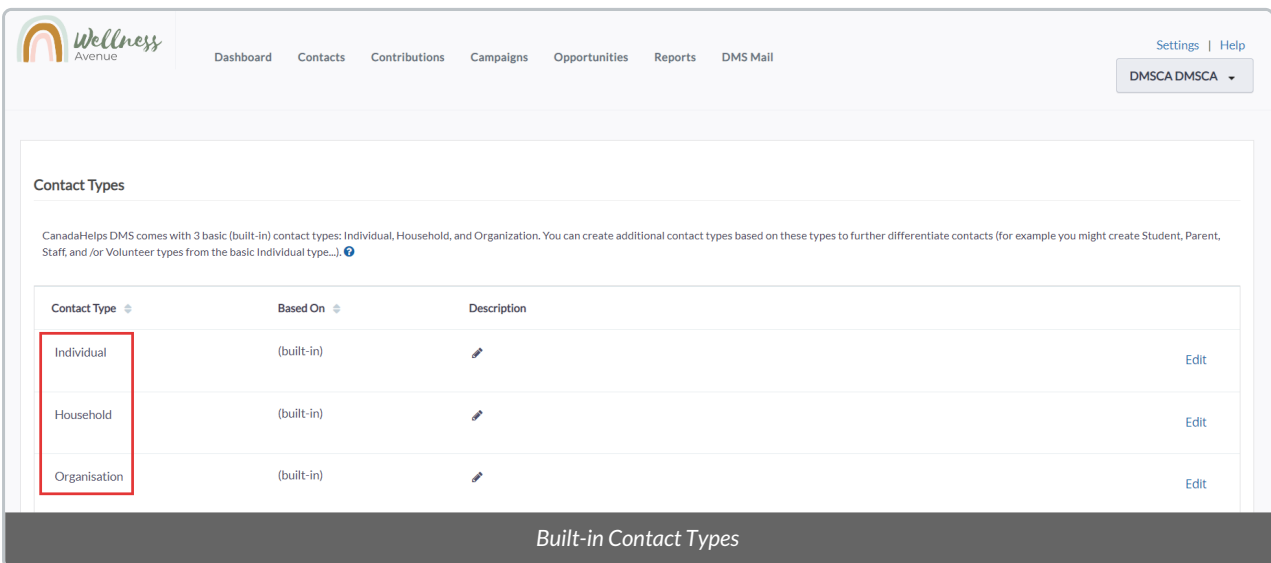


Administrative Settings

2. Under Customize Data and Screens, select **Contact Types**



3. On the next page, you'll see the **3 basic (built-in) Contact Types** that come preloaded with your DMS



4. You'll also see listed some **suggested, additional Contact Types** (both activated and deactivated). From among these suggested Contact Types, you can choose to **Edit, Disable, Delete, or Enable** them.

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Contact Types

CanadaHelps DMS comes with 3 basic (built-in) contact types: Individual, Household, and Organization. You can create additional contact types based on these types to further differentiate contacts (for example you might create Student, Parent, Staff, and /or Volunteer types from the basic Individual type...)

Contact Type	Based On	Description			
Individual	(built-in)				Edit
Household	(built-in)				Edit
Organisation	(built-in)				Edit
Student	Individual			Edit	Enable Delete
Corporate	Organisation				Edit Disable Delete
Foundation	Organisation			Edit	Disable Delete
Government	Organisation			Edit	Disable Delete
Other	Individual			Edit	Disable Delete
Volunteer	Individual			Edit	Disable Delete
Parent	Individual			Edit	Enable Delete
Staff	Individual			Edit	Enable Delete
Team	Organisation			Edit	Enable Delete

Suggested Contact Types

5. If you prefer to add a completely new **Contact Type**, select **Add Contact Type** at the bottom of your screen

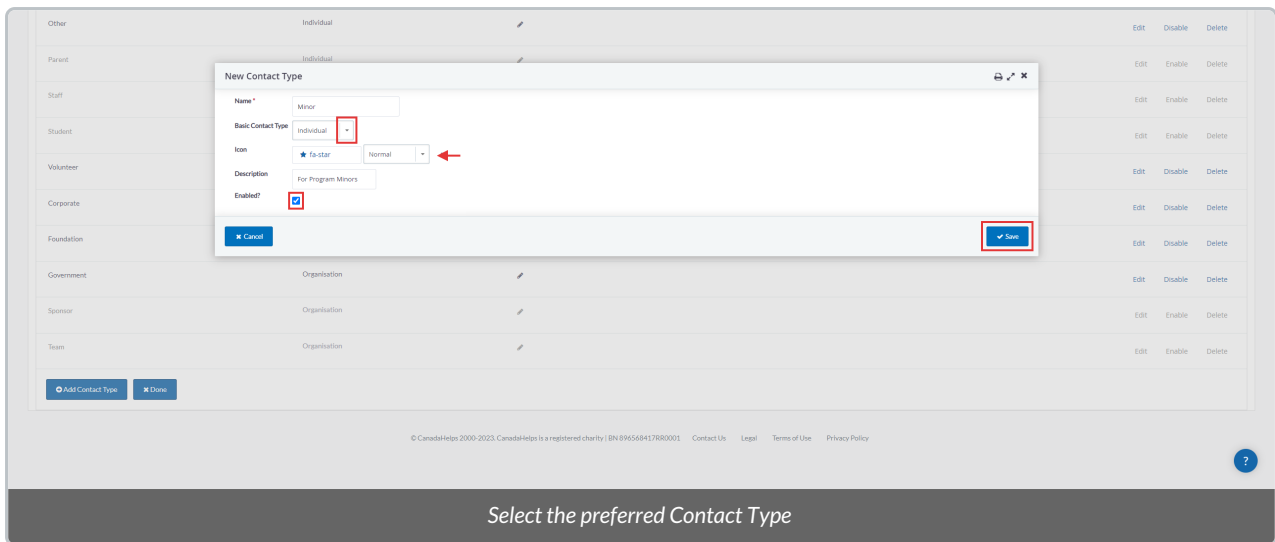
Foundation	Organisation			Edit	Disable	Delete
Government	Organisation			Edit	Disable	Delete
Sponsor	Organisation			Edit	Enable	Delete
Team	Organisation			Edit	Enable	Delete

[Add Contact Type](#) [Done](#)

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Add Contact Type

6. In the pop-up window, fill out the details of your new **Contact type**:



- **Name:** name of the Contact Type
- **Basic Contact Type:** which of the 3 built-in types (individual, organization, household) this new Contact Type relates to
- **Icon:** Select an optional icon to display beside this new type
- **Description:** optional description of this new Contact type
- **Enabled?:** whether this new type is activated and available for selection (or whether it should remain deactivated)

Assigning your New Contact Type

Once you've added your new, additional Contact Type/s, it will be available for selection when either modifying or creating a new Contact in your DMS.

1. When [editing an existing Contact](#), after selecting to edit an *Individual*, you can then choose from among our **additional, individual-based Contact Types** (including the one you've just created):

Edit Cara Miley

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COLLAPSE ALL TABS

Contact Details

Prefix: [] First Name: Cara Middle Name: Last Name: Miley

Current Employer: -select Contact- Job Title: Recognition Name: Contact Type: []

Email add: caramiley@hotmail.com Home On Hold? Bulk Mailings?

Phone: Phone Location: Home Phone Type: Phone

Contact Type dropdown: Minor, Other, Volunteer

Choosing your new Contact Type when editing and existing Contact

2. Similarly, when adding a new Contact, after selecting to add an Individual, we can choose from among our additional, individual-based Contact Types (including the one we've just created):

New Individual

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EXPAND ALL TABS

Contact Details

Prefix: [] First Name: Middle Name: Last Name:

Current Employer: -select Contact- Job Title: Recognition Name: Contact Type: []

Email add: Home On Hold? Bulk Mailings?

Phone: Phone Location: Home Phone Type: Phone

Add another phone number Website Website Type: Work

Contact Type dropdown: Minor, Other, Volunteer

Choosing your new Contact Type when adding an entirely new Contact