How to Add New Contact Types in your DMS

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

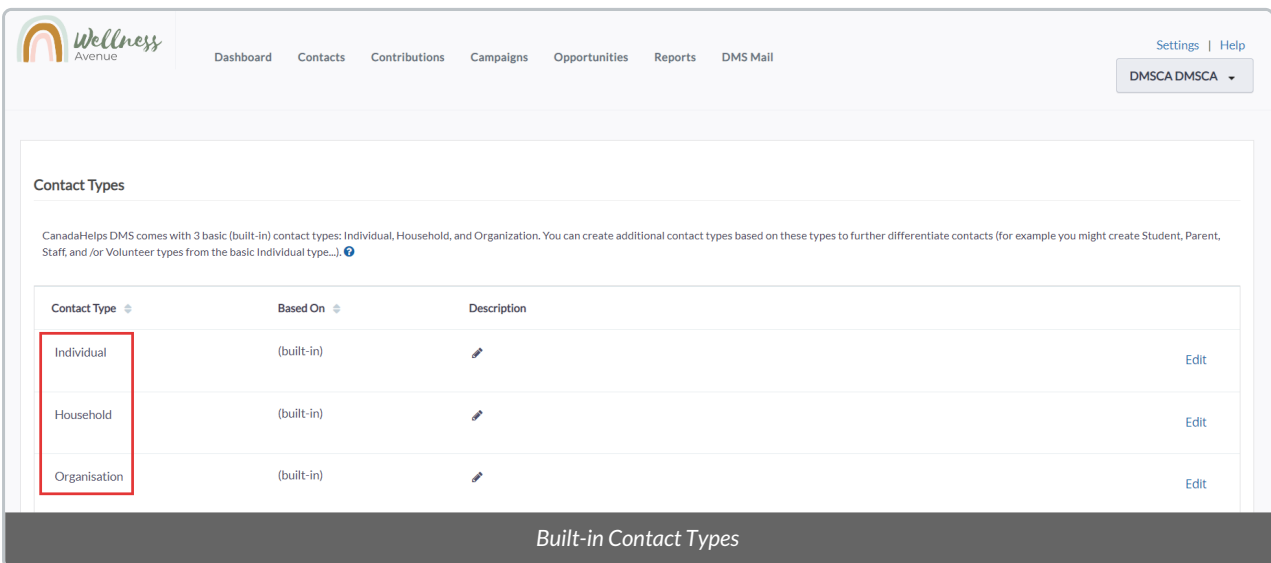1. From your Main Menu, visit your *administrative Settings*

Administrative Settings

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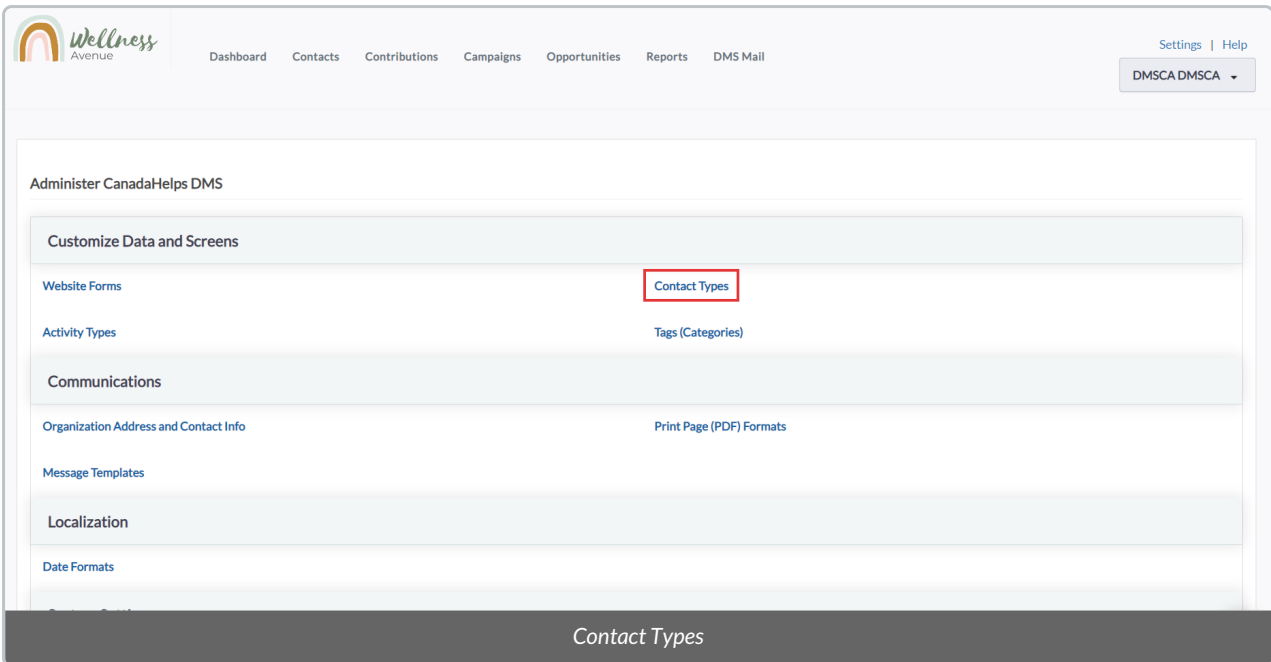
Contact Types

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

Built-in Contact Types

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.

Suggested Contact Types

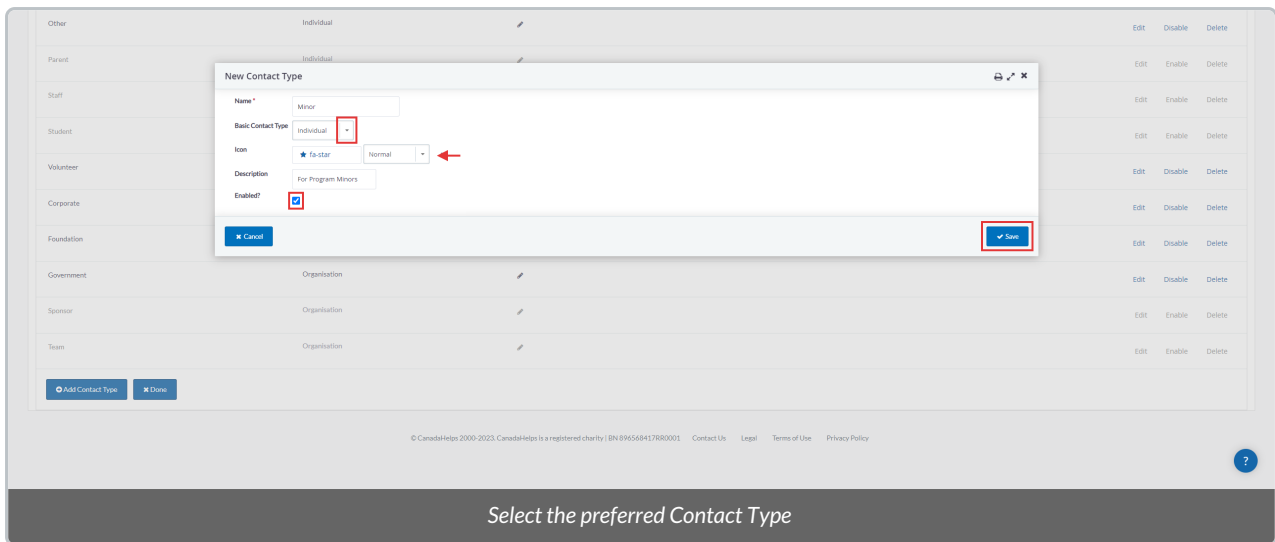5. If you prefer to add a completely **new Contact Type**, select *Add Contact Type* at the bottom of your screen

Add Contact Type

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

Select the preferred 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):

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):

Choosing your new Contact Type when adding an entirely new Contact