

# Contact Types

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## Overview

The main screen of the Contacts Tab presents a list of every Contact record in your account with basic information about each Contact with the option of selecting the contact to view their contact profile for more information. In this article you will learn how to Add a contact, Modify a contact, Delete a contact, and Delete multiple contacts.


## Contact Types

There are three different Types of Contacts in Charity O/S:


- (1) Individuals,
- (2) Organizations, and
- (3) Households.

☐ 1  Chandler Bing

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☐ 2  Central Perks Coffee

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☐ 3  The Geller Household

**Individuals:** A single person or donor, and can be used for [couples](#). Individual contacts can be added as part of a household.

**Households:** Groups of multiple people, often families at the same address (e.g., John and Jane Doe). Tax receipts cannot be issued to households but to an individual within the household. Donation summaries for households are dynamic: if a contact is removed from a household, their donations will also be removed from the household summary view.

**Organizations:** Companies, governments, foundations, and organized groups, etc.

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## Understanding All Contact Fields

### Individual Contact Fields

#### Contact information

- Prefix: the title before the Contact's name. To add more, click on the Gear Icon > Contacts > Prefix.
- First Name: the first name of the Contact.
- Last Name: the last name of the Contact.
- Middle Name: the middle name(s) of the Contact.
- Preferred Name: optional recognition / preferred name of the Contact to be used in any Communications with them.
- Email address: the email address and type (e.g. Home, Work, etc.) of the Contact. Select Add Email to include an additional email address for the Contact.
- Phone number.: the phone number + ext of the Contact. Select Add Phone to include an additional phone number for the Contact.

### **Location**

- Type: if the Contact's address is marked as their home, work, etc.
- Street Address: number and street name.
- Address line 2: optional field for information such as apartment number, etc.
- Country: address's country. You can browse through the list of type the name of the country.
- Province: after selecting the Country, you will see a list of provinces or states.
- City: address's city.
- Postal Code: address's postal code.

### **Additional details**

- Preferred Communication Method: internal reference of the preferred style of communication to be used with this Contact.
- Communication opt-outs: shows if the Contact opted out from any forms of communication (e.g. do not phone or email).
- Receipting preference: this is where you can indicate aggregate/annual if Contact only wants one receipt at the end of the year.
- Contact source: the source of the Contact. To add more options, click on the Gear Icon > Contacts > Source.

- Preferred Language: English or French. Their tax receipt will be issued in this language.
- Household: search by household name (if applicable).
- Gender: the Contact's gender. To add more options, click on the Gear Icon > Contacts > Gender.
- Birthdate the Contact's birth date.
- Website: the Contact's website.
- Note: the contents of the Note (text only).
- Contact is Deceased: marks the Contact as deceased.

## Organization Contact Fields

### Contact information

- Organization Name: the name of the Organization.
- Organization Legal Name: the legal name of the Organization.
- Organization Type: additional segmentation tool for your Organization such as Corporation, Foundation, etc. To add more options, click on the Gear Icon > Contacts > Organizations.
- Email address: the email address and type (e.g. Home, Work, etc.) of the Organization. Select add to include an additional email address for the Organization.
- Phone number: the phone number + ext of the Organization. Select Add Phone to include an additional phone number for the Organization.

### Location

- Type: if the Organization's address is marked as their main, work, etc.
- Street Address: number and street name.
- Supplemental Address 1: optional field for information such as unit number, etc.
- City: address's city.
- Postal Code: address's postal code.
- Country: address's country. You can browse through the list of type the name of the country.
- Province: after selecting the Country, you will see a list of provinces or states.
- Another Address: include an additional address for the Organization.

## Additional details

- Preferred Communication Method: internal reference of the preferred style of communication to be used with this Contact.
- Communication opt-outs: shows if the Contact opted out from any forms of communication (e.g. do not phone or email).
- Receipting preference: this is where you can indicate aggregate/annual if contact only wants one receipt at the end of the year.
- Contact source: source of this contact (e.g. offline). To add more options, click on the Gear Icon > Contacts > Source.
- Preferred Language: English or French. Their tax receipt will be issued in this language.
- Website: the Organization's website.
- Note: the contents of the Note (text only).

## Household Contact Fields

### Contact Details

- Household Name: the name of the Household.
- Preferred Name: optional recognition / preferred name of the Household to be used in any Communications with them.
- Primary contact: individual Contact that is the primary contact for the Household.
- Email: the main email address and type (e.g. Home, Work, etc.) of the Household. Select add to include an additional email address for the Household.
- Phone number: the phone number + ext of the Household. Select Add Phone to include an additional phone number for the Household.

### Location

- Type: if the Household's address is marked as their home, work, etc.
- Street Address: number and street name.
- Supplemental Address 1: optional field for information such as apartment number, etc.
- City: address's city.

- Postal Code: address's postal code.
- Country: address's country. You can browse through the list or type the name of the country.
- Province: after selecting the Country, you will see a list of provinces or states.
- Another Address: include an additional address for the Household.

#### **Additional information**

- Preferred Communication Method: you can select all that apply.
- Communication opt-outs: shows if the Contact opted out from any forms of communication (e.g. do not phone or email).
- Contact source: source of this contact (e.g. offline). To add more options, click on the Gear Icon > Contacts > Source.
- Preferred Language: English or French.
- Website: the Household's website.
- Note: the contents of the Note (text only).