Contact Settings

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This article covers how to add and edit contact-related fields used when entering Contacts in Charity OS.
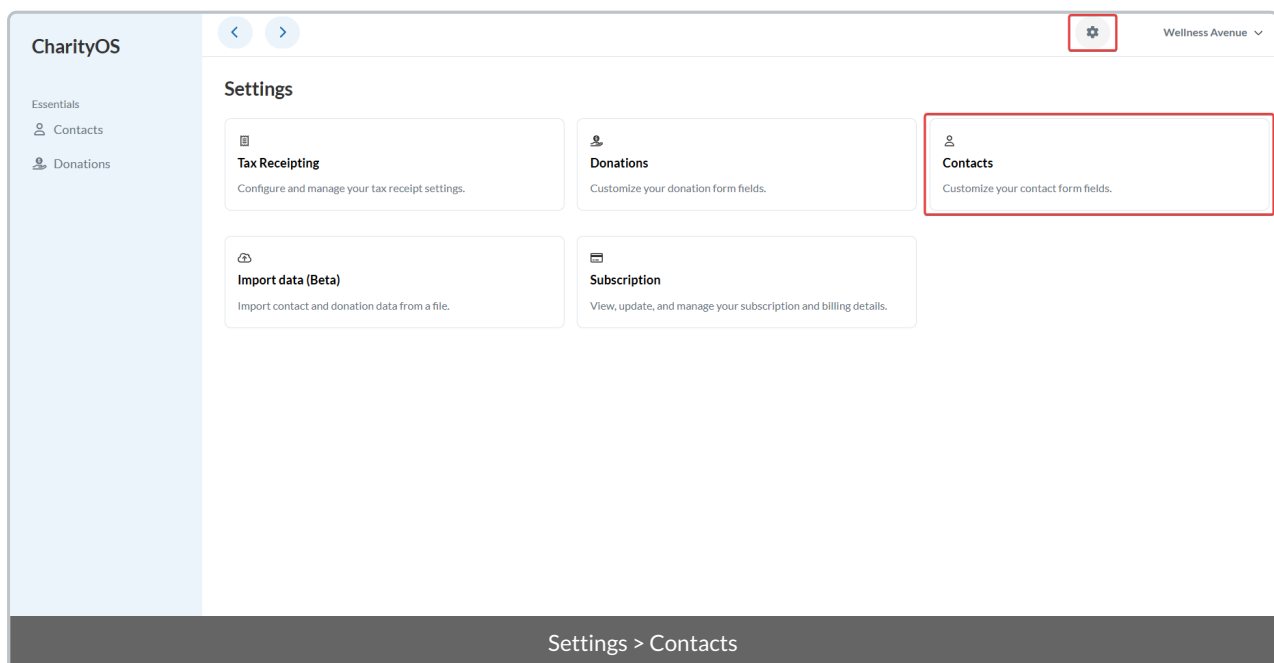
Contact Settings

1. To access **Settings**, click on the gear icon in the top-right corner of your account.

2. Select **Donations**.

Settings > Contacts

Prefix

Default Prefix name options cannot be edited or deleted. However, you can disable them at any time to hide them from view when adding a new contact.

- To add a new Prefix name, click the **Add Prefix name** button.
- To edit, hover over the field and click the **pencil icon**.
- To disable, hover and click on **Disable**.
- To delete, hover and click on **Delete**.

- To reorder, simply click and drag them into your preferred order.

Contact Settings

	Prefix	Gender	Contact source	Organization Type

ℹ Default Prefix name options cannot be edited or deleted; they can only be disabled.

Show disabled Prefix name ⬤ | **+ Add Prefix name**

	Prefix name	Display Order	Status
⠿	Mr./Monsieur	1	Enabled
⠿	Ms./Mademoiselle	2	Enabled

Gender

Default Gender name options cannot be edited or deleted. However, you can disable them at any time to hide them from view when adding a new contact.

- To add a new Gender name, click the **Add Gender name** button.
- To edit, hover over the field and click the **pencil icon**.
- To disable, hover and click on **Disable**.
- To delete, hover and click on **Delete**.
- To reorder, simply click and drag them into your preferred order.

Contact Settings

Prefix	Gender	Contact source	Organization Type

ℹ Default Gender name options cannot be edited or deleted; they can only be disabled.

Show disabled Gender name ⬤ | **+ Add Gender name**

	Gender name	Display Order	Status
⠿	Male/Homme	1	Enabled
⠿	Female/Femme	2	Enabled

Contact source

Contact source allows you to track the origin of the donor (e.g. offline, event-based, data import). Default source (Offline) cannot be edited, deleted or disabled.

- To add a new contact source, click the **Add Contact source** button.
- To edit, hover over the field and click the **pencil icon**.
- To disable, hover and click on **Disable**.

- To delete, hover and click on **Delete**.
- To reorder, simply click and drag them into your preferred order.

Contact Settings

Prefix	Gender	Contact source	Organization Type

ⓘ Default source (Offline) cannot be edited, deleted or disabled.

Show disabled Source ⬤ + Add Source

Source	Display Order	Status
⠿ Offline/Manuel	1	Enabled

Organization

Default Organization Type options cannot be edited or deleted, they can only be disabled.

- To add a new Organization Type, click the **Add Organization Type** button.
- To edit, hover over the field and click the **pencil icon**.
- To disable, hover and click on **Disable**.
- To delete, hover and click on **Delete**.
- To reorder, simply click and drag them into your preferred order.

Contact Settings

Prefix	Gender	Contact source	Organization Type

ⓘ Default Organization Type name options cannot be edited or deleted; they can only be disabled.

Show disabled Organization Type name ⬤ + Add Organization Type name

Organization Type name	Display Order	Status
⠿ Business/Entreprise	1	Enabled
⠿ Government/Gouvernement	2	Enabled