Contact Settings

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

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Contact Settings

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

2. Select Donations.

CharityOS			🗘 Wellness Avenue 🗸				
Essentials	Settings						
A ContactsB Donations	Tax Receipting Configure and manage your tax receipt settings.	2 Donations Customize your donation form fields.	යි Contacts Customize your contact form fields.				
	Import data (Beta) Import contact and donation data from a file.	Subscription View, update, and manage your subscription and billing details.					
	Se	ttings > 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.

ntact S	ettings		
Prefix	Gender Contact source	Organization Type	
Defaul	It Prefix name options cannot be edi	ted 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
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Prefix	Gender Contact so	urce Organization Type	
Defau	Ilt Gender name options canr	ot be edited or deleted; they can only be disabled.	
			Show disabled Gender name 🔵 + Add Gender n
	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	t source (Offlir	ne) cannot be edited,	deleted or disabled.				
						Show disabled Source	+ Add S
	Source			Display Order	Sta	atus	
***	Offline/Manue	1		1	E	Enabled	

Organization

Contact Settings

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.

Prefix	Gender	Contact source	Organization Type				
		u					
Defaul	It Organization	n Type name options o	cannot be edited or dele	ted; they can only be disable	ed.		
					Show disabled Organiz	ation Type name	+ Add Organization Type na
	Organization	Type name		Display Order		Status	
***	Business/Entr	eprise		1		Enabled	
***	Government/0	Gouvernement		2		Enabled	