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.

Co	ontact 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	Setti	ings
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Prefix	Gender Contact	source Organization Type	
Defaul	t Gender name options car	nnot 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	t source (Offlir	ne) cannot be edited,	deleted or disabled.			
					Show disabled Source	+ Add S
	Source			Display Order	Status	
	Offline/Manue	ł		1	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	I lype name options o	cannot be edited or delet	ed; they can only be disable	d.		
					Show disabled Organization Typ	e name	- Add Organization Type na
	Organization	Type name		Display Order	Status		
***	Business/Entr	eprise		1	Enab	led	
***	Government/0	Gouvernement		2	Enab	led	