

Organization as Donor / Purchaser: GiveSmart Events

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Organization as Donor / Purchaser GiveSmart Events

1. What is Organization as Donor / Purchaser?

Organization as Donor / Purchaser is a new feature available to **GiveSmart Events clients**. It allows donors and purchasers to give or transact on behalf of a company, club, foundation, group, or other institution - rather than as an individual. This means your team can now accurately capture, recognise, and report on institutional giving, all within your existing GiveSmart platform.

2. Who is This For?

This feature is designed for two key audiences:

□ Events Admins

Track institutional giving on the admin portal alongside individuals within GiveSmart Events.

□ Organization Donors

Companies, clubs, foundations, and other entities are donating or purchasing as a group.

3. How to Get Started

Step 1 — Enable the Feature

The feature is controlled by a flag in Global Settings. Here is how to turn it on:

1. Log in to your GiveSmart site as an Admin.
2. Go to Global Settings → Advanced Settings.
3. Locate the "Accepts gifts from Organizations" dropdown.
4. Select Enabled from the dropdown.

⚠ **Note:** Once one or more Organization users have been created on your site with at least one successful purchase or transaction recorded, this dropdown will be locked and cannot be changed.

Default Behaviour by Site Type for EVENTS

Existing sites: Feature is disabled by default. Enable manually using the steps above.

New or copied sites: Feature is enabled by default. You may disable it from the same settings path if needed.

Step 2 — Create an Organization User (Admin)

Admins can create or encounter Organization users through the following paths:

GiveSmart Events paths:

- User Details → Create New User
- Check-In → + Purchase Ticket for New Attendee
- Tickets → Ticket Orders → + New Order
- Auction → Manage All Items → + New Item → Donated By / Solicited (Company / Organization)
- Donor-facing forms (when the Org section is enabled on the form)

Step 3 — Donor Self-Registration (Donor Facing)

When the feature is enabled, donors can select whether they are giving as an Individual or as an Organization on the following forms:

- Home Page Order Form
- Custom Order Form
- Donate Now Form
- Champions / Peer-to-Peer (P2P) Form

Organization users can donate in both logged-in and guest (logged-out) states. As an Admin visiting the site, all tabs remain visible. As an Organization donor, access is limited to the Home Tab, Pay Tab, and My Info Tab. The Items & Donate Tab is hidden for Organization users in Events.

⚠ Note: Any order processed outside of the Organization's account is expected to create a new profile. To avoid duplicate profiles, use the existing Organization record created earlier. Orders created from the admin site are also expected to create new accounts or profiles.

4. Key Things to Explore

① Organization Contact Records

When an organization donates or purchases, GiveSmart captures a rich set of data fields specific to that entity:

- Organization / Entity Name
- Organization Email & Phone
- Mailing Address
- Primary Point of Contact (required)
- Secondary Point of Contact (optional)

Organization users are stored as their own distinct contact type, separate from individual donor records. They are fully searchable and filterable across the platform.

② Receipts, Statements & Donor Recognition

All donor-facing and admin-facing materials automatically reflect the Organization:

- Receipts (PDF & email): Display the Organization Name
- Receipts reflect the Primary Point of Contact with “Att” (Attention) formatting.
- Statements reflect a Point of Contact column listing the Primary Point of Contact.

⚠ Note: Receipts and statements will be sent to both the organization's and the primary point of contact's email addresses.

③ Ticketing for Organizations

- Organizations can purchase tickets, and Points of Contact can attend the events along with other organization employees. Receipts and statements are sent to the organization's email address.

④ Reporting Upgrades

GiveSmart now distinguishes between Individual and Organization donors in reports:

- User Type column added to differentiate Individual vs. Organization
- Organization Name populates in the Organization Name column
- Purchaser Detail Report includes additional org fields: email, phone, address, city, state, zip
 - Impacted reports: Purchaser Detail, Disbursements → All Batch Activity, Disbursements → Batch Report, Org Hub Disbursements → Batch Export

5. Known Limitations

We want to share current constraints. The table below summarizes known limitations:

Limitation	Details
Cannot merge Organization users	Org users cannot be merged or marked as duplicates
No support tool elevation	Organization users cannot be elevated via the support tool
No bidder numbers	Bidder numbers cannot be assigned to Organization users
Broadcast comms excluded	Org users only receive welcome emails, receipts & statements. No broadcast emails or SMS, hence the Receive Messages section is hidden on the "Here to modify your profile" page
Dropdown locks after the first org is created	The enable/disable dropdown is locked once one or more org users exist with at least one successful purchase or transaction recorded on the site
Items & Donate tab hidden	The Items & Donate tab is hidden for organization users, whereas for an admin visiting the site, all tabs remain visible.
Feature flag required	The feature must be explicitly enabled in Global Settings before it is visible to donors
No direct check-in for Organization users	Organization users cannot be checked in directly. The Point of Contact representing the organization will be checked in on their behalf
Checkout flow restrictions	The "Select Additional Guest" and "Send Pay Link" features are not applicable and unavailable for Organization users during checkout

Coming Soon: We are actively working to refine this feature based on your feedback.

6. Frequently Asked Questions

Q: What types of organizations can be set up?

Any non-individual entity — including companies, clubs, foundations, groups, and institutions.

Q: How does a donor choose to give as an Organization?

When the feature is enabled, donors or purchasers can toggle whether they are giving as an

Individual or an Organization / Entity. This selection determines what information is collected and how the donor appears across receipts, statements, acknowledgements, and reports.

Q: Are Organization donors separate from Individual donors?

Yes. Organization donors exist as their own distinct donor/contact/user type, fully distinguishable from individual records across forms, receipts, recognition, and reporting.

7. How to Share Feedback

Your feedback is essential to shaping this feature before it reaches general availability. Here is how to get in touch:

▣ Support Team

Reach out to your GiveSmart support contact for questions, bugs, or unexpected behaviour.

▣ Direct Email

For urgent issues, contact your Customer Success Manager directly and reference "Org as Donor " in the subject line.
