# Organization as Donor / Purchaser: GiveSmart Fundraise

Last Modified on 08/20/2026 8:59 am EDT

# Organization as Donor / Purchaser GiveSmart Fundraise

## 1. What is Organization as Donor / Purchaser?

Organization as Donor / Purchaser is a new feature that 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:

| | |
|---|---|
| Fundraise Admins<br>Configure and manage org donor settings, forms, and reporting on GiveSmart Fundraise. | **Organization Donors**<br>Companies, clubs, foundations, and other entities are donating or purchasing as a group. |

## 3. How to Get Started

### Step 1 — Enable the Feature

1. Open your donation or payment form settings.
2. Click the Manage Sections dropdown.
3. Select "Add Organization as Donor/Purchaser Section".
4. Save your form. The Contact Information tab will always appear beneath the Org as Donor tab.

**Fundraise Only:** Only payment forms support the Organization as aDonor section at this time.

## 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
- Donor Recognition Walls, Wheels & Scrolls (Fundraise): Display the Organization Name unless the donor chose to remain anonymous
- Thank You / Confirmation Pages: Show the Organization Name clearly

**③ Ticketing for Organizations**

- Organization users can purchase tickets. Points of Contact and other organization employees can attend.
- Primary Contact receives SMS ticketing messages (if SMS is enabled).
- Both the Organization and Primary Contact receive ticket confirmation emails.
- If guest info is not collected at purchase, the Organization Name will appear as the guest's name at check-in.

**④ Reporting Upgrades**

GiveSmart now distinguishes between Individual and Organization donors in reports:

- Contacts search results now include a Contact Type column ("Individual" or "Organization")
- Transactional Searches can be exported with full Organization data, including Contact Type, Organization Name, address, email, phone, and Primary/Secondary Contact info

**Offline Donation Support**

Admins can now record offline donations from an Organization. The offline donation screen includes a new checkbox — "Donating or purchasing as an Organization" — which, when selected, surfaces all organization-specific data fields for proper tracking.

## 5. Known Limitations

| Limitation | Details |
|---|---|
| Broadcast comms excluded | Org users only receive welcome emails, receipts & statements. No broadcast emails or SMS |

## 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. On both platforms, 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 feedback" in the subject line.