

Organization as Donor / Purchaser: GiveSmart Fundraise Beta

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Organization as Donor / Purchaser GiveSmart Fundraise

1. What is Organization as Donor / Purchaser?

Organization as Donor / Purchaser is a new BETA feature available to **GiveSmart Fundraise 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.

BETA Notice: This feature is currently in Beta. Additional enhancements and refinements may be introduced based on usage and feedback. Please share your experience using the feedback channel at the end of this article.

2. Who is This For?

This feature is designed for two key audiences:

<input type="checkbox"/> Fundraise Admins Configure and manage org donor settings, forms, and reporting on GiveSmart Fundraise.	<input type="checkbox"/> Organization Donors Companies, clubs, foundations, and other entities are donating or purchasing as a group.
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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 a Donor 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 in BETA

We want to be share about current constraints during this BETA period. The table below summarizes known limitations:

Limitation	Details
Broadcast comms excluded	Org users only receive welcome emails, receipts & statements. No broadcast emails or SMS
Feature flag required	The feature must be explicitly enabled in Global Settings before it is visible to donors

Coming Soon: We are actively working to expand and 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. 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 during the BETA.

□ Direct Email

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