Organizational Giving: What to Expect, from Events and Fundraise to Your Donor CRM

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Audience: Beta clients using GiveSmart Events, Fundraise and Donor CRM with Organization as Donor enabled

More of your gifts are coming from companies, foundations, and other organizations, not just individuals. Organization as Donor gives those donors a proper home in GiveSmart: their own record type, their own fields, and a clean path into your CRM once a gift comes in.

This article walks through the full experience, start to finish. Because most of what changes for your team happens after a gift or registration syncs to your CRM, that's where we spend the most time.

What Organization as Donor Changes

Before this feature, organization donors were stored the same way as individuals, just with a flag marking them as companies. That worked within a single GiveSmart module, but it broke down whenever your data needed to come in or out.

Organization as Donor gives organizations their own record type, separate from individuals, everywhere that record travels: in GiveSmart Events, Fundraise, and in your CRM. Individuals stay individuals. Organizations stay organizations. Nothing gets merged or flattened along the way.

Capturing an Organization Donor in Events and Fundraise

On the donation link, form, or event registration, your donor (or your staff, entering a gift manually) can select or enter an organization instead of an individual. A few things to expect:

- **The organization profile is simplified to what matters at the point of giving:** organization name, phone, email, and address. This is the donor of record: receipts, listings, and reporting reference the organization, not a person's name.
- **You can capture a point of contact (POC) directly on the transaction.** Most organizational gifts have a real person behind them, someone at the company who made the gift happen. A Primary POC is required; a Secondary POC is optional. Each POC has its own address toggle, so you can add a POC's address only when needed.
- **Validation keeps bad data out.** Required fields display inline errors, and the donation (or save) button remains disabled until all required fields are filled in. Address entry uses type-ahead to reduce typos.
- **Receipts reflect the organization.** Payment receipts show the organization name in place of a first and last name, and the contact type displays as "Organization" or "Individual".
- **POC details are saved, not just displayed.** Whatever you capture for the transaction, primary and/or secondary POCs, is saved with the record and carried through to your

CRM.

None of this changes how your team works day-to-day in Events or Fundraise. The organization donor experience was built to fit into your existing workflow, not replace it.

Learn more:

- Capturing Organization Donors in GiveSmart Events
- Capturing Organization Donors in GiveSmart Fundraise

What Happens When Your Events and Fundraise Data Syncs to Your CRM

This is the part most beta clients want to understand well, so here's the full path a gift or contact takes.

1. Your gift or contact leaves Events or Fundraise

When a contact or transaction is saved in Events or Fundraise, it's tagged internally as either an **Individual** or an **Organization** record. That tag is what everything downstream uses to route the record correctly.

2. It's mapped to your CRM's fields

Your CRM's Data Mapping Tool now has a dedicated **Organization** contact type, separate from Individual, with its own default field mappings preloaded (organization name, organization phone, organization POC details, and more). If your team has customized how incoming fields map to CRM fields, those mappings are respected for organization records the same way they already are for individuals. Any CRM field left unmapped simply stays blank rather than getting incorrect data.

A mapping change you make only affects data going forward; records already synced into your CRM aren't rewritten. Records still sitting in the review queue, however, are reprocessed against the updated mapping before you approve them.

3. It lands in a review queue (if manual review is on)

If your CRM is configured for manual review, new organization contacts and organization transactions show up in your **Data Review** tables just like individual records do:

- The **Contacts** review table adds an **Organization Name** column and an **Existing Organization Name** column, both sortable, so you can see the incoming organization name next to any existing match your CRM has already identified.
- The **Transactions** review table adds an **Organization Name** column that is also sortable.
- For an organization record, First Name/Last Name fields simply appear blank (that's expected; there's no individual name to show). For an individual record, the organization fields stay blank. Each row only shows what applies to that contact type.

If manual review is off, records are processed straight through to your CRM using your configured mappings.

4. Approved records are created in your CRM

Once reviewed and approved (or processed automatically), the organization contact or transaction is created in your CRM. Transactions carry their POCs, so you can see who in the organization is tied to the gift without leaving the transaction record.

5. What to expect on timing

Syncs run on a regular, automated cadence; you shouldn't need to manually trigger anything for a gift to move from Events or Fundraise into your CRM. If you notice a gift that hasn't synced after a reasonable window, that's worth flagging to support rather than assuming it's expected behavior.

A current beta limitation to know about

Automated duplicate detection for organization contacts and transactions is still rolling out; today, it's fully built for individuals, but not yet live for organizations. In the meantime, use the **Existing Organization Name** column in the Contacts review table to manually compare an incoming organization against what's already in your CRM, especially if the same organization gives through both Events and Fundraise.

What You'll See in Your CRM After the Sync

Once an organization donor is in your CRM, here's what's different from an individual record:

The organization contact profile

The profile now leads with **Organization Name**, **Organization Phone**, **Primary Organization Email**, and **Organization Mailing Address** (with optional extended address lines), plus Tags and Notes, the same as any contact. The old Organization Display Name field is gone; Organization Phone and Primary Organization Email now sit in that space instead.

Up to two points of contact per organization

An organization contact record supports a **Primary** and a **Secondary** POC. Neither is shown by default; you add one using **the Add Point of Contact + button**. Each requires First Name, Last Name, Phone, and Email; Title/Role is optional. You can add, edit, or delete either POC independently. If you delete the Primary, the Secondary is automatically promoted to Primary, so the record never ends up with a POC gap.

Multiple contact methods, kept separate by type

Organization contacts can have more than one phone number and email address (with one marked primary), but they're restricted to organization-appropriate contact types; an organization record can't use "home," "cell," or "work" phone types, and an individual record can't use organization-specific ones. This keeps the two record types from getting confused in a list or export.

The transaction summary shows both POCs

The Transaction Summary displays Primary and Secondary POC details when they exist. Only populated fields are shown; the Secondary POC's address fields are omitted to keep the summary readable, and older transactions created before this feature still display correctly.

Merge protections

Your CRM won't let you merge an individual record into an organization record, or vice versa. Two organization records can be merged, with the same safeguards you'd expect for individual duplicates.

Thank-you letters, pledge communications, and email campaigns

Organization-specific merge fields are available across Thank You Letters, pledge communications, and email campaigns, with the correct population of Organization Name, address, and Donor ID. If you're editing a template that mixes individual and organization fields, field labels now clarify which ones are individual-specific so you don't accidentally pull a blank field into an organization acknowledgment.

Reporting

Custom reports across Contacts, Transactions, and combined datasets now support organization-specific fields: Organization Name, Organization Phone, Organization Primary POC details, and Transaction Primary POC details, with address mapping built to handle organization records correctly.

Still rolling out

Excel exports from Gift List and Donors & Contacts are being updated to fully represent organization donors and their gifts (organization identity, associated contacts, and correct gift attribution). This work is in progress; until it's complete, double-check exported organization data before relying on it for reconciliation or external reporting.

Importing Organization Data Directly

If you import contacts or transactions via CSV/Excel rather than through Events or Fundraise, organization records are supported there too:

- The global Contacts and Transactions import templates have been replaced with updated versions that support organization fields, featuring more consistent validation and error handling.
- The Data Mapping Tool's Organization contact type applies here as well, so your organization field mappings work the same whether data arrives via import or via the Events/Fundraise sync.
- Imported organization records flow through the same Data Review tables described above, with the same Organization Name columns and sorting.

Questions or Something Looks Off?

This feature is in beta, and we're actively rolling out the remaining pieces described above (organization duplicates review and the Excel export update). If you see a gift that hasn't synced, an organization record that looks wrong, or behavior that doesn't match what's described here, reach out.