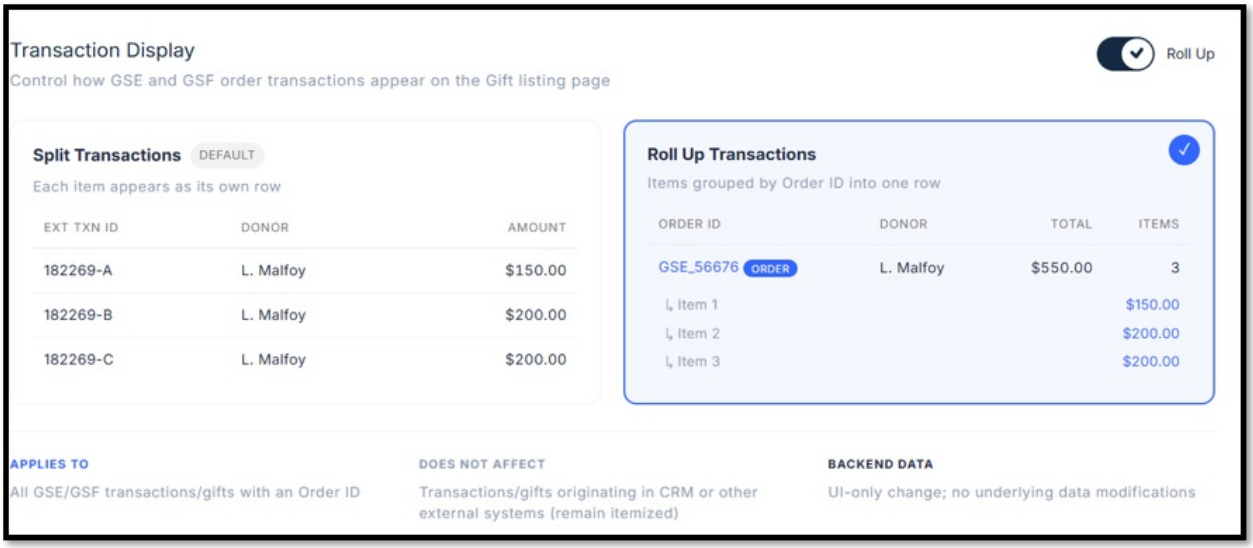
Configurable Order Roll-Up Transaction Display

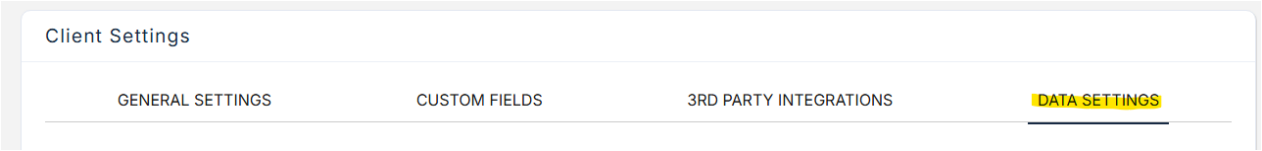
Last Modified on 11/25/2026 3:47 pm EST

Donor CRM lets administrators choose how multi-item GiveSmart Events (GSE) and GiveSmart Fundraise (GSF) orders appear. Switch to Roll-Up Transactions and your team sees one row per order, with item detail one click away. Split Transactions stays the default, so nothing changes until an administrator opts in.

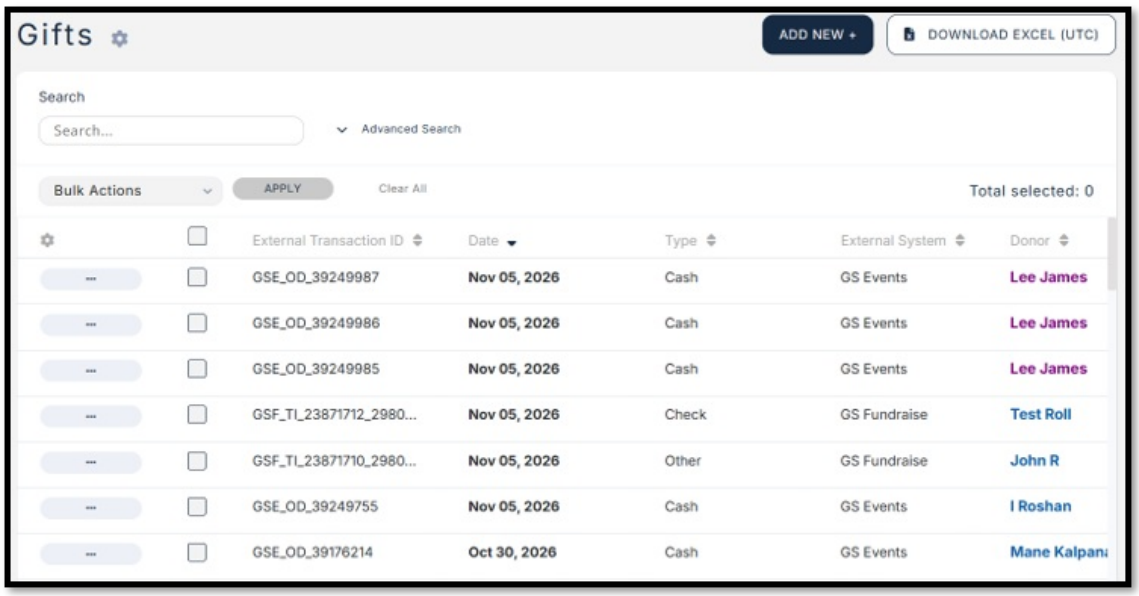


A client-level setting, available to client administrators only, sets how order transactions appear for your whole organization:

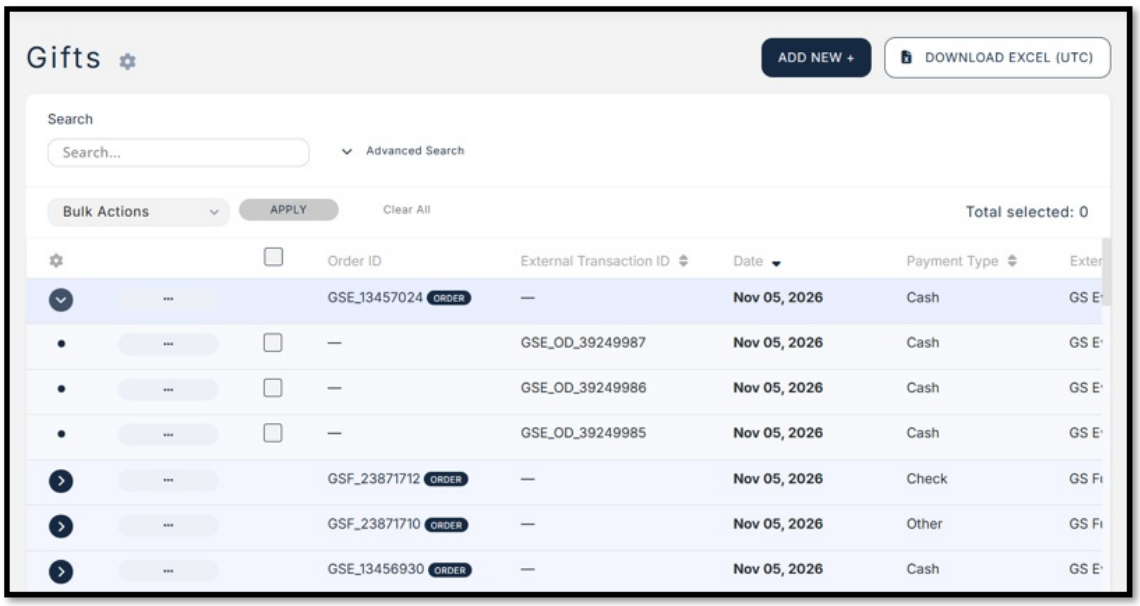
Found in **Client Settings**, and then **Data Settings**:



- **Split Transactions:** The current behavior and the default. Each item is its own transaction.



- **Roll-Up Transactions:** One row per order with summary information, such as the total amount. Expand the row to see each item.





NOTE: Roll-up is primarily a UI display change with minimal backend impact. Item-level data remains traceable when rolled up, and clients who do not enable the setting see no change.

Highlights

A new Transaction Display setting: Find it in Client Settings > Data Settings. You see which mode is active at any time, and Donor CRM asks you to confirm before you switch. The change applies going forward to new multi-item orders from GSE and GSF.

Order-level review in Manage Data Import: With Roll-Up on, the Transactions tab groups imported transactions by Order ID. You review and confirm imports at the order level, the same way gifts will appear on the Gift listing page. Expand any order to see its items. In Split mode, the tab stays a flat list of item-level rows. The Contacts tab is the same in both modes.

The same view across your team's work: Your users see the same pattern on the Gift listing and the Donor Profile Gifts tab: expandable order rows and a status badge showing the active mode. Edit, Delete, and Apply to Pledge work on every row type. Transactions without an Order ID show as itemized rows.

Donor stats that count gifts, not items: Last Gift, Total Gifts, Average Gift, and Lifetime Giving reflect orders. Giving frequency and donor value trends reflect what donors actually did.

At a Glance

Where	Split Transactions (default)	Roll-Up Transactions
Gift listing	One row per item	One expandable row per order
Donor Profile > Gifts	One row per item	Expandable order rows
Manage Data Import > Transactions	Flat list of items	Grouped by Order ID
Manage Data Import > Contacts	No change	No change
Donor summary stats	Counted by item	Counted by order
Who can change the setting	Client administrators	Client administrators

FAQs for Admins

Setting up Roll-Up Transactions

Who can change the Transaction Display setting?

- Client administrators only. You will find it in Client Settings > Data Settings.

What is the default?

- Split Transactions, which is how Donor CRM works today. Each item in an order is its own transaction.

What happens if I do nothing?

- Nothing changes. Your gift listings, import review, and donor stats stay exactly as they are until an administrator turns on Roll-Up Transactions.

How do I know which mode is on?

- Data Settings shows your current Transaction Display setting. A status badge on the Gift

listing page shows the active mode to everyone on your team.

Will I be asked to confirm before I switch?

- Yes. Enabling Roll-Up Transactions asks you to confirm first.

What your team will see

What does a rolled-up order look like?

- One row per order with summary information, such as the total amount. Expand the row to see each item in the order.

Can we still see item-level detail?

- Yes. Item-level data stays traceable when you roll up an order. Expand the order row to see every item.

Where does Roll-Up Transactions show up?

- On the Gift listing page, the Donor Profile Gifts tab, and the Transactions tab in Manage Data Import. Donor summary stats also reflect it.

Can my team still edit, delete, or apply a gift to a pledge?

- Yes. Edit, Delete, and Apply to Pledge are available on every row type: order rows, expanded items, and itemized rows.

How do donor stats change?

- Last Gift, Total Gifts, Average Gift, and Lifetime Giving are calculated

Existing data and imports

Does roll-up change my historical data?

- No. Roll-up applies going forward to new multi-item orders from GiveSmart Events (GSE) and GiveSmart Fundraise (GSF). Historical data is not retroactively transformed.

Why do some transactions still appear as individual rows?

- Transactions without an Order ID display as itemized rows. That includes legacy transactions.

How does Manage Data Import work with roll-up on?

- The Transactions tab groups imported transactions by Order ID. You review and confirm imports at the order level, and expand any order to see its items. This matches how the gifts appear on the Gift listing page.

What if I stay in Split mode?

- The Transactions tab stays a flat list of item-level rows, exactly as it is today.

Does the Contacts tab change?

- No. The Contacts tab in Manage Data Import is the same in both modes.

Are Order IDs now available in my GSE and GSF files?

- Yes. GSE and GSF import and export files include Order ID and Item ID as separate columns. Donor CRM stores the Order ID for incoming transactions, and Order IDs were populated for existing Events and Fundraise transactions through backfill scripts.

What is not included

Are gift thank-yous consolidated by order?

- Not in this release. Thank-yous continue to work at the item level, in both modes.

Do exports and integrations change with Roll-Up Transactions?

- Not in this release. Exports and downstream integrations were not redesigned, apart from the new Order ID and Item ID columns in GSE and GSF files.