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Let's Get Acquainted!

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onecause® | CUSTOMER WEBINAR

KEY UPDATES & ENHANCEMENTS

OneCause Fundraising Platform



Thursday, July 25, 2024



Steve Lausch
Director, Product Marketing



Nikki DeFalco
Director, Partner Success

Beyond the Webinar

- ✓ Recording and slides will be sent via email.
- ✓ Look out for exclusive Bonus Content!
- ✓ Visit [OneCause.com/Resources](https://www.onecause.com/resources).
- ✓ Add questions, comment, or send emojis in the Chat.

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Meet Our Fundraising Experts



Steve Lausch

Director, Product Marketing
OneCause



Nikki DeFalco

Director, Partner Success
OneCause

THINGS HAVE CHANGED

...

- ✓ LISTEN TO CUSTOMERS
- ✓ LEVERAGE NEW TECHNOLOGY
- ✓ COMMIT TO INNOVATION



THINGS HAVE CHANGED

...

1. GENERAL USE
2. INTEGRATED TICKETING
3. SPONSORSHIPS
4. TABLE MANAGEMENT
5. REGISTRATION & CHECK-IN
6. TEXT MESSAGING
7. DONATIONS & GIVING
8. AUCTIONS, FIXED PRICE & RAFFLES
9. ARTIFICIAL INTELLIGENCE
10. PAYMENTS & RECONCILIATION
11. REPORTING & ANALYTICS
12. ONLINE FUNDRAISING
13. ONECAUSE UNIVERSITY™

KEY UPDATES &
ENHANCEMENTS

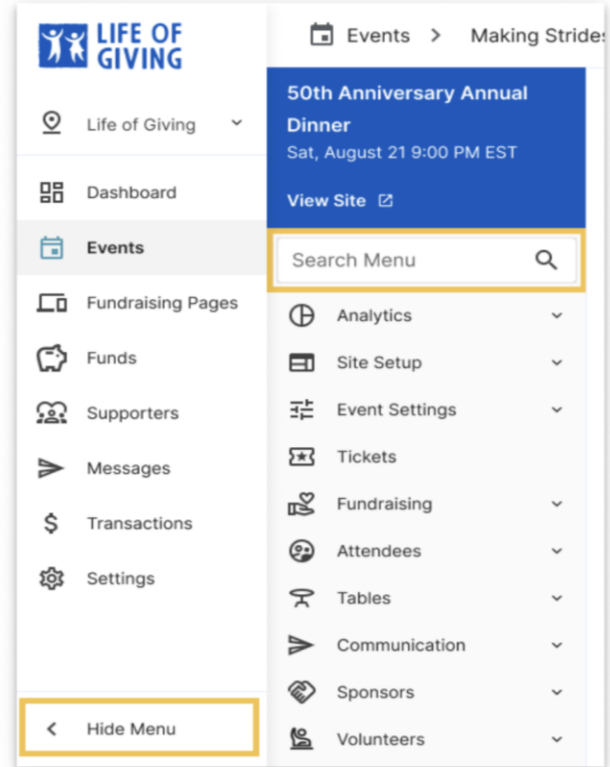
GENERAL USE

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Improved User Interface

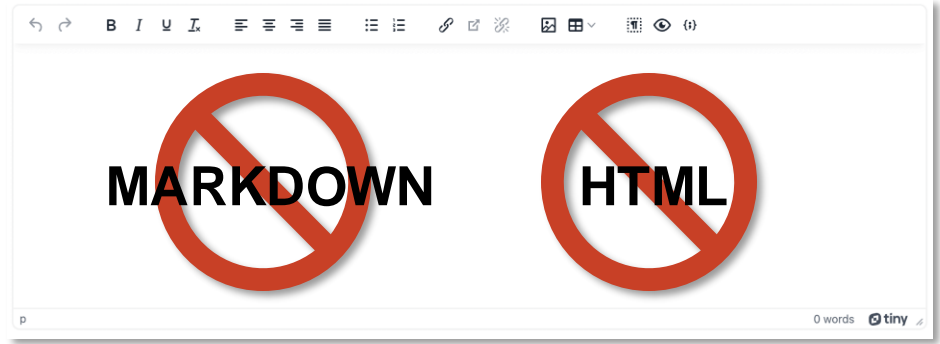
How can we make the admin experience easier?

- Main navigation now in collapsible menu
- Event navigation reorganized
- Search Menu field enables quick access to features
- Global vs. Event views of event & online fundraising



WYSIWYG Editors

How can we make the admin experience easier?



- What You See Is What You Get (WYSIWYG)
- REPLACES markdown language in the Platform
- Now in:
 - Story Editor (Events & Fundraising Pages)
 - Registration Confirmation Message
 - Pre-Event Questions
 - Custom Pages
 - Auction Item & Lot Descriptions
 - Fixed Price Descriptions
 - Raffle Descriptions
 - Sponsor Game
 - Receipt Message (Events & Fundraising Pages)
 - ... and many other places through the Platform!

Fundraising Feed

How is fundraising going?

- Configure filters for real-time alerts:
 - Donations
 - Recurring Donations
 - Sponsorships
 - Tickets
 - Item Donations
- Events & Fundraising Pages
- Daily summaries
- Subscribe to Emails

Fundraising Alerts

Filters

Today [Activity](#)

 Donation - \$1,000.00
The Joe Duca for Annual Honoree Dinner

Mon, Jan 08

Sun, Jan 07

Sat, Jan 06

Fri, Jan 05


Thu, Jan 04


Wed, Jan 03

Fundraising Summaries

Filters 1 Filter Selected

Today as of 1:26 PM EST [Activity](#)

 Annual Honoree Dinner
0 Sponsorships - \$0
0 Tickets - \$0
[2 Donations - \\$1,050.00](#)

 Recurring Donations Processed
[1 Recurring Donation - \\$25](#)

Mon, Jan 08

Sun, Jan 07

Sat, Jan 06

Fri, Jan 05

Thu, Jan 04 [Activity](#)

Wed, Jan 03 [Activity](#)

Site Activation

How can we best manage an Event Site that is under construction?

- Preview only mode
- Does not allow donations or other transactions
- Determine what supporters see when they visit an Inactive site
- Create separate pre- and post-event messages

This screenshot shows the 'Site Design' configuration page for an event site. The 'Site Status' is set to 'Active', indicated by a green dot and the word 'Active' in a dropdown menu. The main content area displays the message: 'Your site status is currently active.' and a button labeled 'Visit Supporter Experience'. The left sidebar contains navigation options such as 'Analytics', 'Site Setup', and 'Site Design'.

This screenshot shows the 'Site Design' configuration page for an event site with the 'Site Status' set to 'Inactive', indicated by a red dot and the word 'Inactive' in a dropdown menu. A tooltip for the 'Inactive' status shows an 'Activate' button. The main content area displays the message: 'Your site status is currently inactive. If supporters visit the event page they will see what you've configured below.' and buttons for 'Visit Supporter Experience' and 'Edit Settings'. Below this, the 'Message Content' section shows a pre-configured message: 'Thank you for supporting the Pine School Annual Gala. Please visit https://onecause.se to learn more about our mission or make a contribution.'

KEY UPDATES &
ENHANCEMENTS

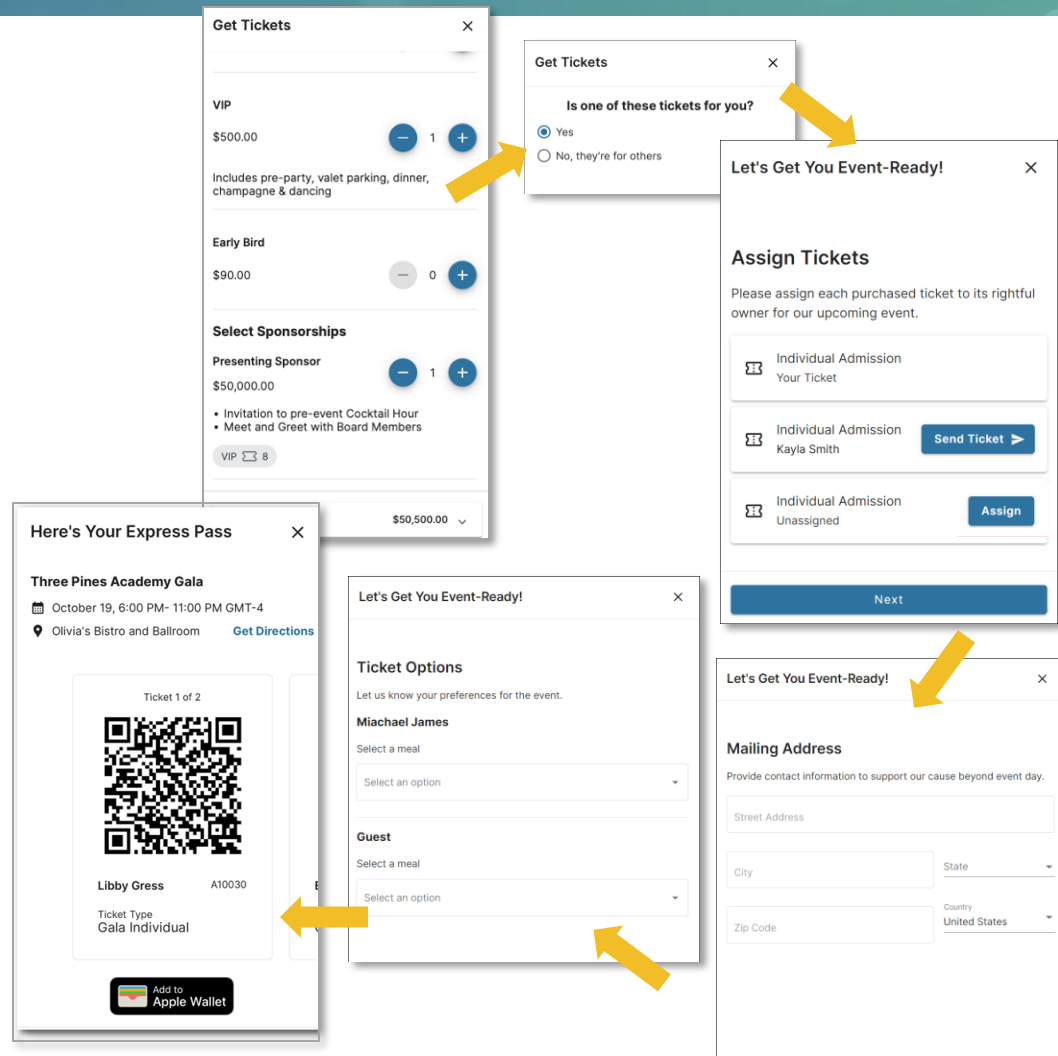
INTEGRATED TICKETING

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Ticket Purchase

How might we evolve the ticket purchase experience to be more intuitive for supporters?

- Sell Sponsorships as part of ticketing purchase
- Streamline data capture
- Owners can text guests to claim ticket and receive QR code
- Save ticket QR code to Wallet
- Sell tickets offline



Ticket Purchase: Included Items & Add Ons

How might we build in more flexibility to include other items, like wristbands, parking passes, or other handouts?

- Included Items
- Add Ons
- Donations

The screenshot shows a 'Get Tickets' window with a close button (X) in the top right. Below the title is a section titled 'Please Consider Donating' with four buttons: '\$250', '\$100', '\$50', and '\$25'. A 'Custom' input field is located below these buttons. At the bottom of the donation section are five icons: a thumbs up, a heart, a person with a hand raised, a hand with a dollar sign, and a hand with a fist. Below the icons is a 'Donate Anonymously' toggle switch. At the bottom of the window, there is a 'Total 1 Item' indicator and a 'Back' button.

The screenshot shows a 'Get Tickets' window with a close button (X) in the top right. Below the title is a 'Total 1 Item' indicator and a price of '\$34.92'. Below this is a section titled 'Add Ons'. The first add-on is 'Beer Schwing Lanyard®' for '\$5.00', with a 'Sales End Sep. 19, 2022' and a description: 'Go hands-free at the fest and Schwing-on! The best way to carry your sampling glass and to hang your pretzels and swag.' The second add-on is 'Dom Perignon Vintage with Gift Box 2012' for '\$299.00', with a 'Sales End Sep. 19, 2022' and a description: 'Dom Pierre Pérignon was appointed "cellarer", or administrat...'. The third add-on is 'Valpo Brewfest 2022' for '\$20.00'. Each add-on has a minus button, a quantity of '0', and a plus button. At the bottom of the window, there is a 'Total 1 Item' indicator and a 'Back' button.

The screenshot shows a 'Check In' window with a close button (X) in the top right. Below the title is a section titled 'Items to Handout (Optional)'. Below this is a section titled 'Libby Glass' with a list of items: 'Drink Swaglet Add On' for '\$300' and 'Libby Glass Add On' for '\$20'. Each item has a minus button, a quantity of '1', and a plus button. At the bottom of the window, there is a 'Total 1 Item' indicator and a 'Back' button.

Ticket Purchase: Cover Costs & Ticket Fees

How can we make Ticketing more profitable?

- 70% of guests willing to “Cover Costs” if it’s a *reasonable* percentage
- Sweet spot is 4-5%
- Ticket Fees can be passed along to guests

Get Tickets ×

Total	^
Individual Ticket	\$300.00
<hr/>	
Subtotal	\$300.00
Cover Costs	\$9.30
Total 1 Items	\$309.30

Want to give a little more to cover the costs associated with your order?
\$9.30 will be added to your total.

KEY UPDATES &
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SPONSORSHIP

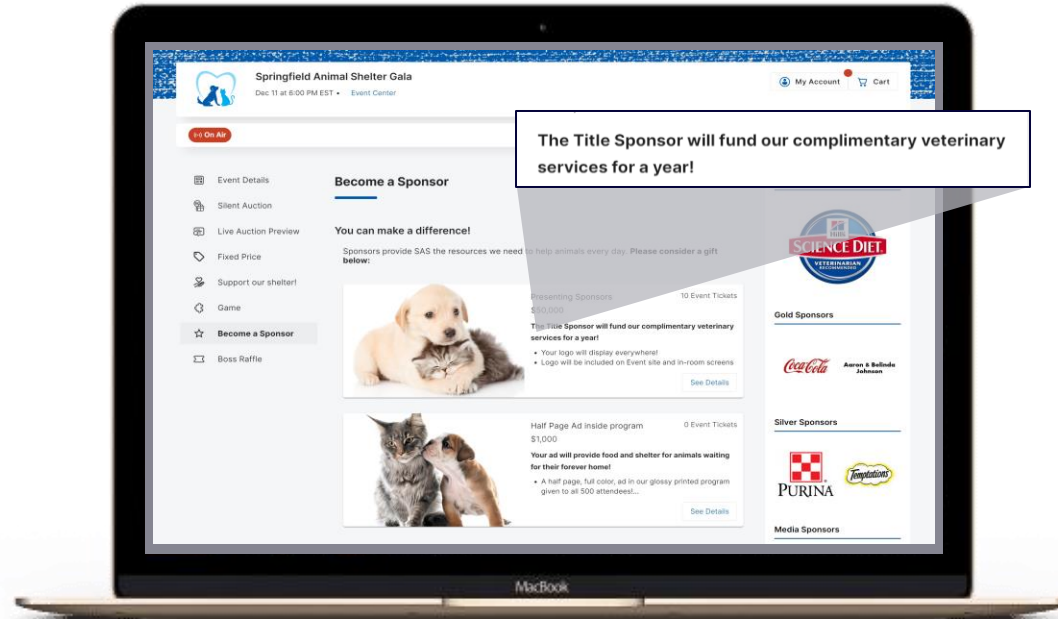
S

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Online Sponsorship Sales

How can we make Sponsor management easier?

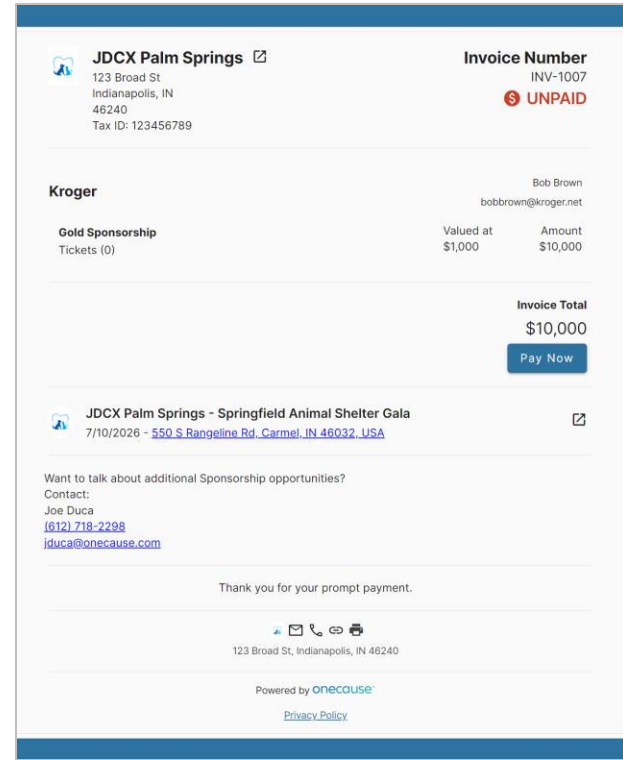
- Sponsorship sales in admin & event site
- Can include tickets & logo placement
- Includes impact image & message
- Sell sponsorships before you have an event date
- Now with WYSIWYG editor



Pay Later Sponsorships (Invoicing)

Supporters want to Sponsor even if they have to pay later, how can we make it easy for them?

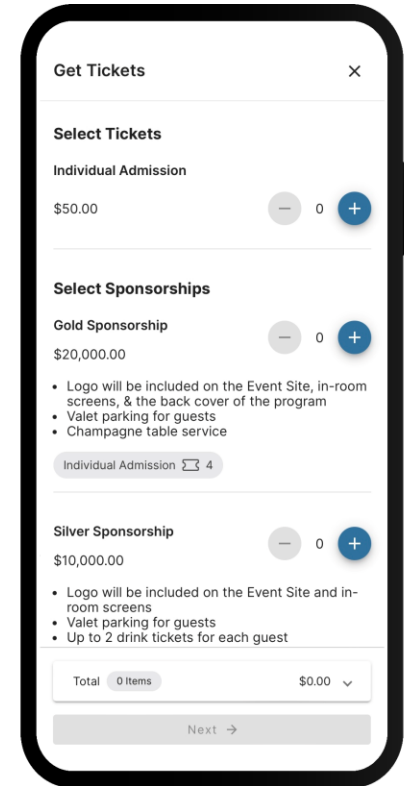
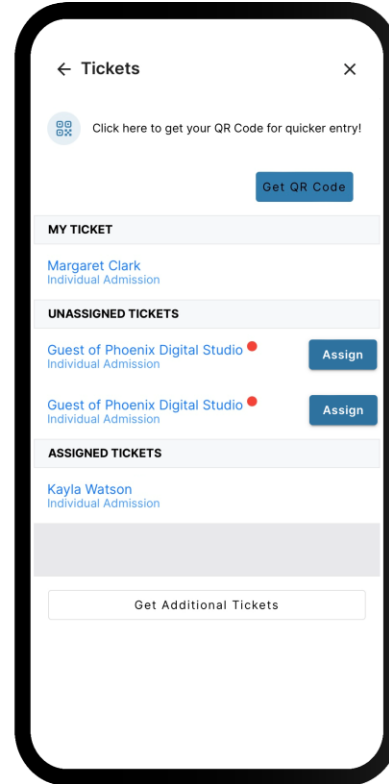
- Enable Sponsors to reserve a Sponsorship and invoice themselves
- Invoices can be paid online or sent by mail with payment
- Removes friction and secures more sponsorships online
- Included in our Enterprise Package



Sponsor Guest Management

How can we improve management of Sponsor attendees?

- Enable Sponsors with ability to manage their tickets
- Text guests to claim their tickets
- More flexibility for Sponsors (e.g., as their guest list changes)
- Reduces need to track down guest information
- Saves time and headache for the nonprofit



Sponsor Analytics & Reporting

How can we retain more Sponsorships?

- Quantify brand interaction
- Track sponsor guest contributions
- Demonstrate the overall impact of sponsorship to your sponsor
- Prove value to help with future solicitation

Sponsor Name	Clickthrough URL	Clickthrough Count	View Count - Event Site	View Count - Slideshows	# Checked in Attendees	Location in Game	View Count - Game
Hills Science Diet	http://www.hills.com	78	724	75	253	Top of Tile	116
Kroger	http://bit.ly/ghyruejk	95	720	75	253	Highlight	140
CBS			650	75	253	Back of Tile	19

KEY UPDATES &
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TABLE MANAGEMENT

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Table Management

- Supporters are grouped based on ticket purchase
- Easily identify unseated attendees
- Drag-n-drop Unseated Supporters to a Table or seated supporters from one table to another
- Manage supporters manually or via Bulk Import

The screenshot displays a user interface for managing event seating. On the left, a panel titled "Unseated Supporters (19)" contains a search bar, a filter button, and a list of supporters. On the right, a panel titled "Tables (10)" contains a search bar, a filter button, and a list of tables. A yellow box highlights the name "Charles Smith" in the unseated supporters list, with a blue notification bubble containing the number "1".

Unseated Supporters (19)

Bulk Actions

Search Supporters Filter

John Cyrus
Gala Individual

Jennifer Dunning
Gala Individual

Ollie Johnson
Gala Individual

Sarah Browne
Gala Individual

Charles Smith

Tables (10)

Search Tables Filter

+ New Table

1. Smith (6/8 seats available)

Attendee	Ticket Type	Ticket Ow...	Checked In
Carrie Smith	Gala Couple		
Alice Vega	Gala Indivi...		

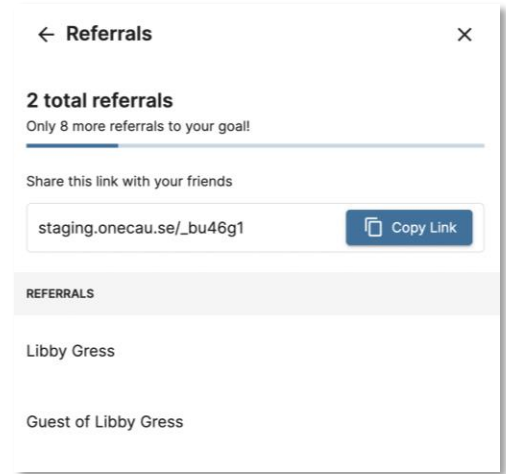
2. Paramount (8/8 seats available)

3. Disney (0/8 seats available)

Table Captain Referral Links

Harness the influence of your most valuable supporters with referral tracking

- Assign unique links to table captains
- Encourage them to promote the event to their network
- Measure and track their event fundraising impact
- Amplify your fundraising efforts



← Referrals ×

2 total referrals
Only 8 more referrals to your goal!

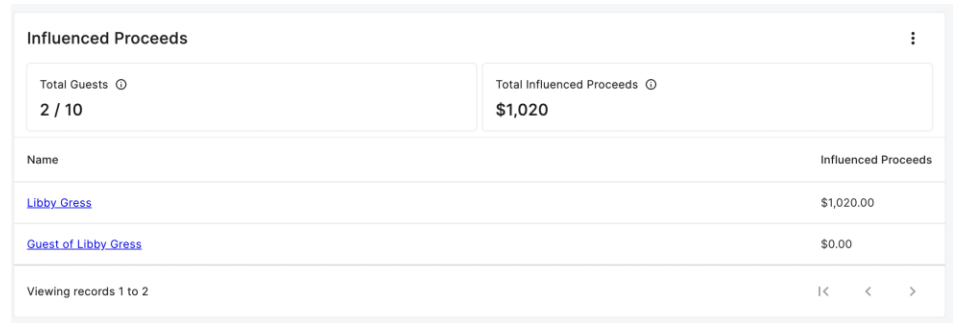
Share this link with your friends

staging.onecau.se/_bu46g1 [Copy Link](#)

REFERRALS

Libby Gress

Guest of Libby Gress



Influenced Proceeds

Total Guests ⓘ 2 / 10	Total Influenced Proceeds ⓘ \$1,020
Name	Influenced Proceeds
Libby Gress	\$1,020.00
Guest of Libby Gress	\$0.00

Viewing records 1 to 2

**KEY UPDATES &
ENHANCEMENTS**

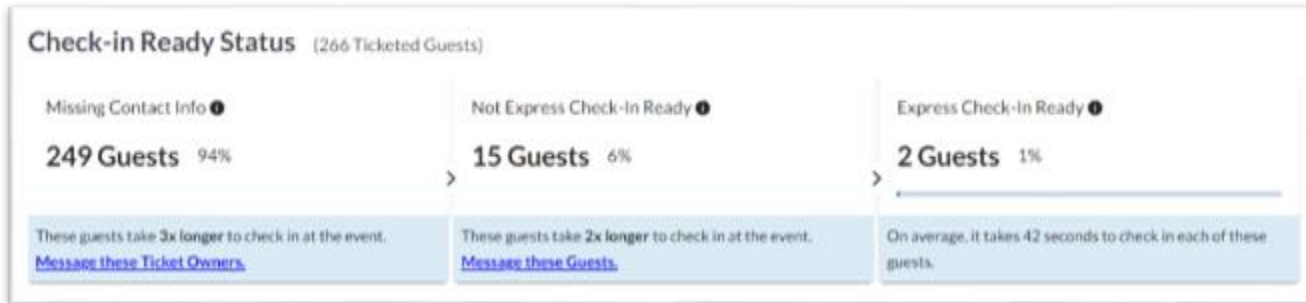
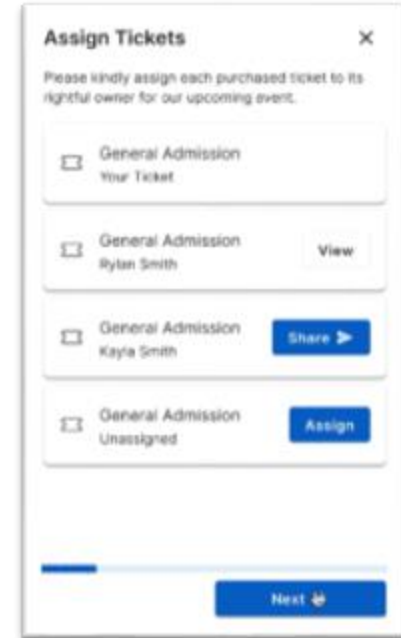
REGISTRATION & CHECK-IN

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Check-In Readiness

Can we improve Registration flow and make it faster?

- QR codes
- Easy guest management (including questions)
- Ticket buyers handle their own sharing
- Check-in Readiness dashboard to figure out what Reg will look like



Volunteer Login & Permissions

How do we have a secure volunteer experience that doesn't slow us down?

- Volunteers are given access to specific tools
- Have access during specific timeframe (great when using their own phone)
- Self-register new vols onsite

Add Volunteer

Who is this volunteer?

Steve Lausch

What access should they have in Event Day Tools?

Permissions will change for this volunteer across all events.

Basic
These tools have basic permissions.

- Check-In
4 Volunteers
- Item Pick Up
4 Volunteers
- Walk-Up Ticket Sales
4 Volunteers

Advanced
These users will be able to charge people's carts.

- Add Charges
2 Volunteers
- Spotter Tool
3 Volunteers
- Bid Assist
1 Volunteers

Supporter Profile

How can we improve managing Supporters at an event?

- Event Attendee Merge
- Attendee Bulk-Edit
- Updated management of attendee details, incl:
 - Tickets
 - Payments
 - Shared carts
 - Paddles
 - Messaging (incl Opt Out Status)

The screenshot displays the OneCause Event Supporters interface. The main view shows the profile for Libby Gress, including contact information, demographics, and event details. A dropdown menu is open, showing options like 'Create Text Message', 'View Potential Duplicates', 'View Cart', and 'Sell Tickets'. A modal window titled 'Compare Attendee Records' is open, comparing two records for Margaret Clark. The modal includes a table of attributes and a 'Merged Record Preview' section.

Margaret Clark		Margaret Clark	
Select All		Select All	
OneCause Acct	email1@email.com (123) 456-7890	OneCause Account Not Created	
Ticket Type	<input checked="" type="radio"/> VIP Ticket Purchased by Margaret Clark	<input type="radio"/> Non-ticketed	
First Name	Margaret	Margaret	
Last Name	Clark	Clark	
Email	<input checked="" type="radio"/> email1@email.com	<input type="radio"/> No Email	
Phone	<input checked="" type="radio"/> (123) 456-7890	<input type="radio"/> (555) 555-5555	
Address	No Address	No Address	
Paddle #	<input checked="" type="radio"/> 113	<input type="radio"/> No Paddle Number	
Table #	<input checked="" type="radio"/> 1	<input type="radio"/> No Table Number	
Check-In Instructions	<input type="radio"/> No Check-In Instructions	<input type="radio"/> No Check-In Instructions	

Merged Record Preview

OneCause Account
email1@email.com
(123) 456-7890

Ticket Type
VIP Ticket
Purchased by Margaret Clark

Name
Margaret Clark

Email
email1@email.com

Phone
(123) 456-7890

Address
No Address

Paddle #
113

Table #
1

Check-In Instructions
No Check-In Instructions

Cancel Merge Attendees

KEY UPDATES &
ENHANCEMENTS

TEXT MESSAGING

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Preset Messages

How can we enhance the messaging experience?

- Robust library (40+) of the most common text messages
- Hyperlinks to key pages on event site
- Fastest, easiest way to send messages on the fly
- Perfect for organizations who do not need custom messaging

Outbound Messages

Content

You're all set! Click the link to view your express pass. Do not share your link:
https://staging.onecau.se/_f666e1

Congratulations! You've won a silent auction item. Click the link to view your cart:
https://staging.onecau.se/_f5k7z1

Your paddle number is {{ .Recipient.PaddleNumber }}. Your table number is {{ .Recipient.TableNumber }}.

Welcome! Participate here: {{ .Shared.EventURL }}

Your paddle number is {{ .Recipient.PaddleNumber }}. Your table number is {{ .Recipient.TableNumber }}.

[out. staging.onecau.se/_3a3k21](https://staging.onecau.se/_3a3k21)

Your paddle number is {{ .Recipient.PaddleNumber }}. Your table number is {{ .Recipient.TableNumber }}.

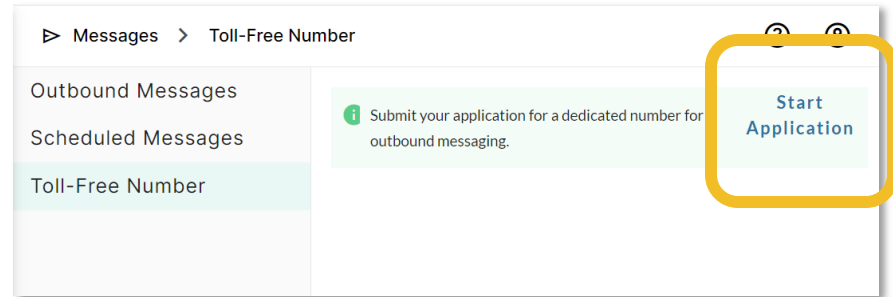
Welcome! Participate here: {{ .Shared.EventURL }}

Your item(s) are ready to be picked up. Please head over to the check-out table when you're ready.

Custom Messages

What if your event requires more than Preset Messages?

- You can still send Custom Messages
- Now sent through your own dedicated toll-free number (DTFN)
 - Transition from shared short code
 - Less risk with carrier (e.g., AT&T, T-Mobile)
 - Faster, more confident delivery
 - Application in software, at no cost
- Year-round communication



Edit Automated Messages

How can we enhance the messaging experience?


- Quickly & easily edit descriptive content in messages
- Creates more specific, more contextual messaging for your event
- Maintains links to protect message integrity
- Requires a Dedicated Toll-Free Number (DTFN)

Post Check-In Message

This message will be sent automatically to supporters who have checked into your event.

Message Preview
Your paddle number is {{ .Recipient.PaddleNumber }}. Your table number is {{ .Recipient.TableNumber }}.

Edit Message 49/148 Characters

Message content must not contain prohibited language. [Learn More](#) 

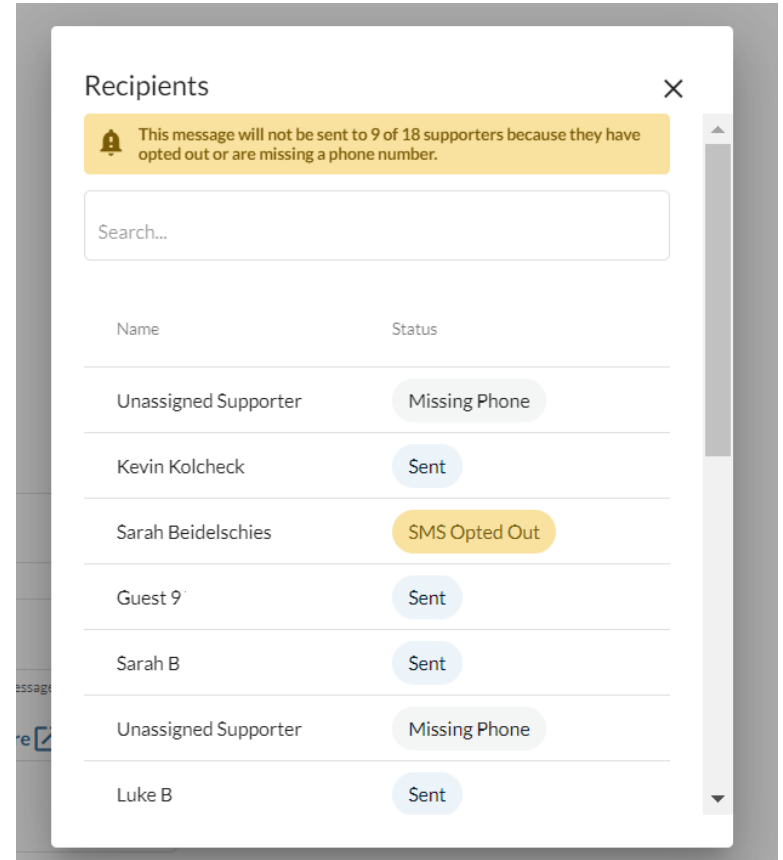
Content	Your paddle number is	{{ .Recipient.PaddleNumber
Content	Your table number is	{{ .Recipient.TableNumber

[Reset](#) [Cancel](#) [Save](#)

Message Recipient List

How might we see who is going to receive my Event text messages?

- # of supporters who are included in the recipient list
- # of supporters who are excluded from the recipient list
- Excluded due to "opt out" status or no phone / email provided
- View Recipients popup that shows all included and excluded recipients



KEY UPDATES &
ENHANCEMENTS

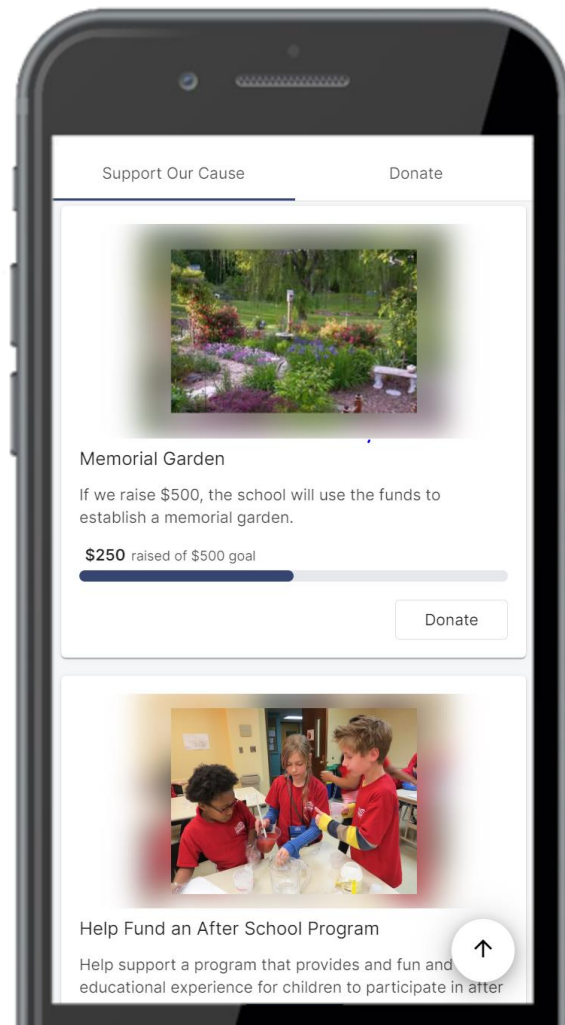
DONATIONS & GIVING

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Community Giving: Targeted Achievements

How can we encourage community giving?

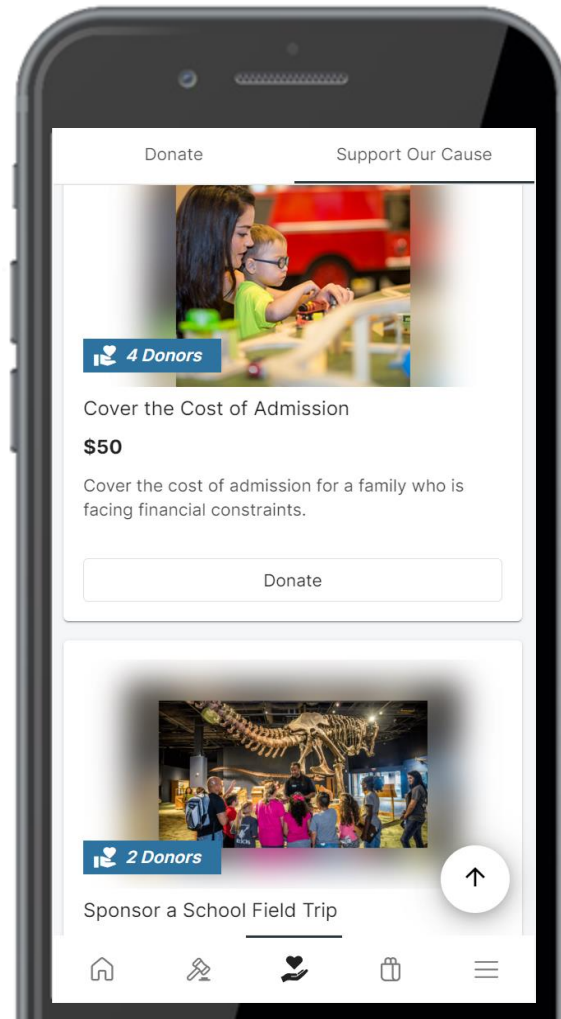
- Individual, mini-appeals
- Smaller amounts make giving accessible for all donors
- Give before, during, or after your event
- Focus on specific parts of your mission



Community Giving: Impact Levels

How can we encourage community giving?

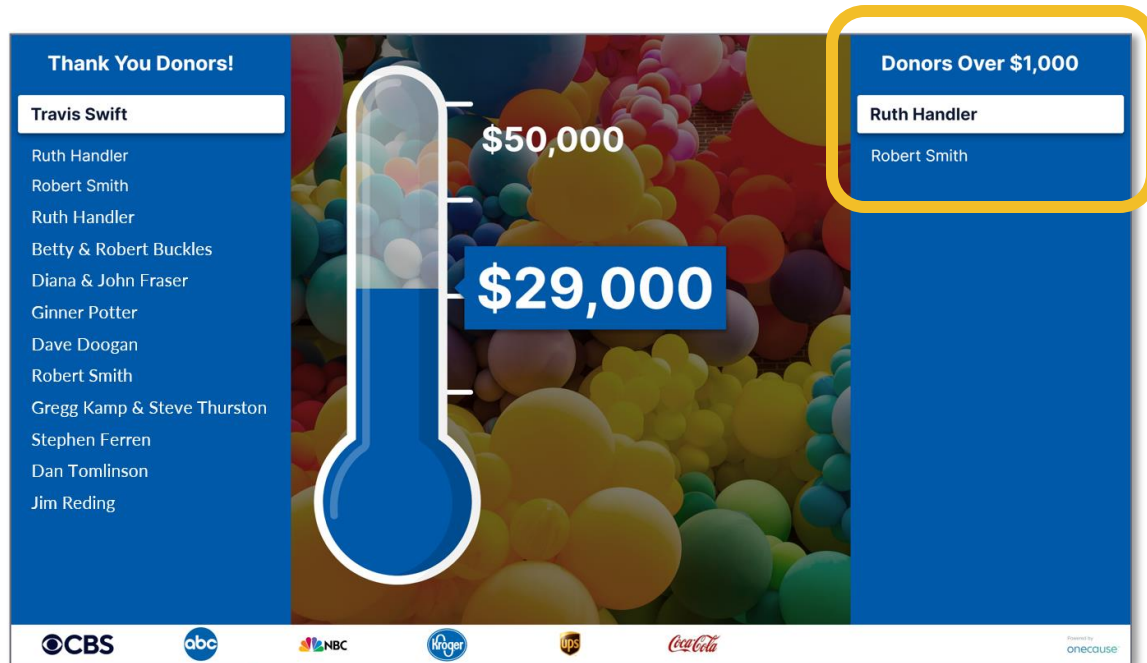
- No goal / thermometer
- Smaller giving amounts drive total revenue
- Focus on specific parts of your mission
- Fund programs, projects, basic expenses



Competitive Giving: Top Donors Slide

How can we encourage competitive giving?

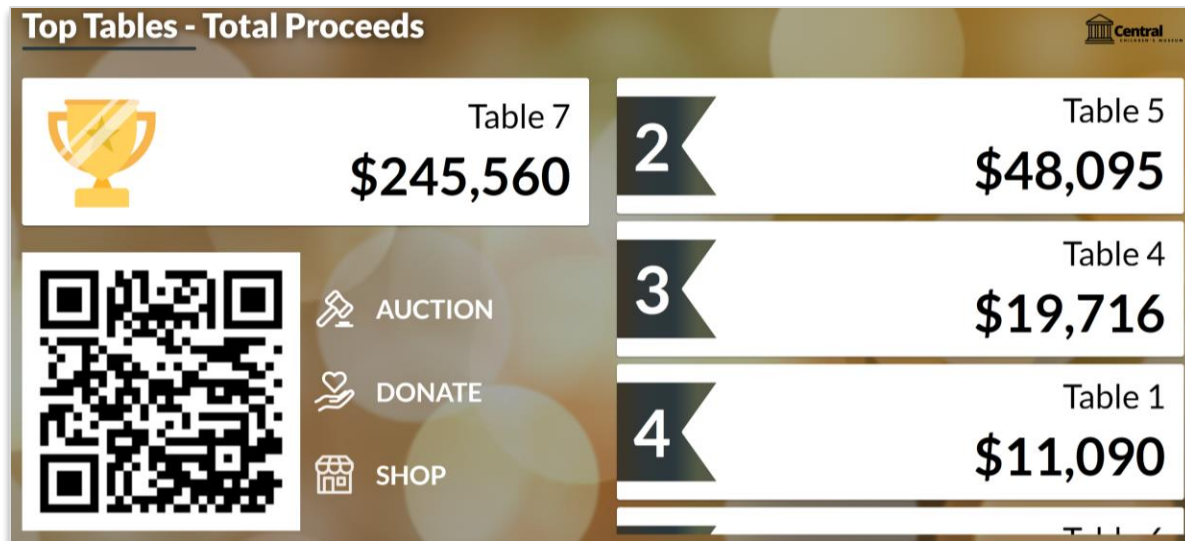
- Acknowledge large donors and major gifts
- Remains on screen longer
- Edit \$ to determine who shows at right
- Encouragement for larger donors to join the list



Competitive Giving: Top Tables Slide

How can we encourage competitive giving?

- Acknowledge community work of Tables
- Feature dollars donated
- Feature engagement (e.g., include bids)
- Make prizes available to drive activity






Competitive Giving: Donate to Vote

How can we encourage competitive giving?

- Vote by donating
- Creative way to grow event revenue, while polling your guests
- Vote for best theme, best chef, best bartender, etc.
- Show on slide/scoreboard

Vote for Next Year's Theme

 Masquerade \$250	 The Roaring 20s \$150
 Red Carpet Event \$100	

Recurring Donations & Self-Management

How can we extend fundraising from our Events & Campaigns?

- Recurring is everywhere
- Edit giving levels & frequency (weekly, monthly, or annually)
- Build trust by providing donors control over their own giving

The screenshot shows a user interface for managing recurring donations. At the top, there is a header for "Benton Foundation Recurring Donations" with a logo. Below this is a section titled "Recurring Donation History".

The first entry is an active donation of "\$120 Monthly". It includes a "Next donation: Feb 26, 2024 | VISA *** 4021" and a green "Active" status indicator. The donation was initiated on July 2022 from a virtual event. Below this, a "Gifts" table shows the following data:

Year	Total Amount
2024	\$120 this year
2023	\$1,440 this year
2022	\$720 this year

An "Edit Recurring Donation" button is located below the table.

The second entry is a canceled donation of "\$10.40 Monthly". It includes a "Canceled" status indicator and was initiated on March 2022 from a virtual event. Below this, a "Gifts" table shows the following data:

Year	Total Amount
2022	\$83.20 this year

KEY UPDATES &
ENHANCEMENTS

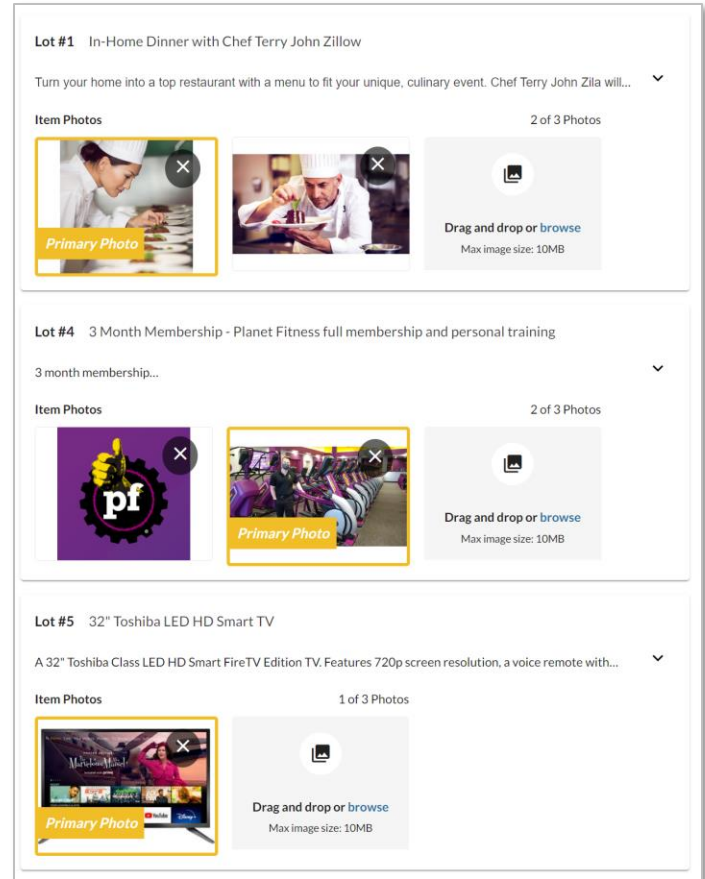
AUCTIONS, FIXED PRICE & RAFFLES

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Auction Image Uploader

How can we improve the admin and guest experiences with multiple photos?

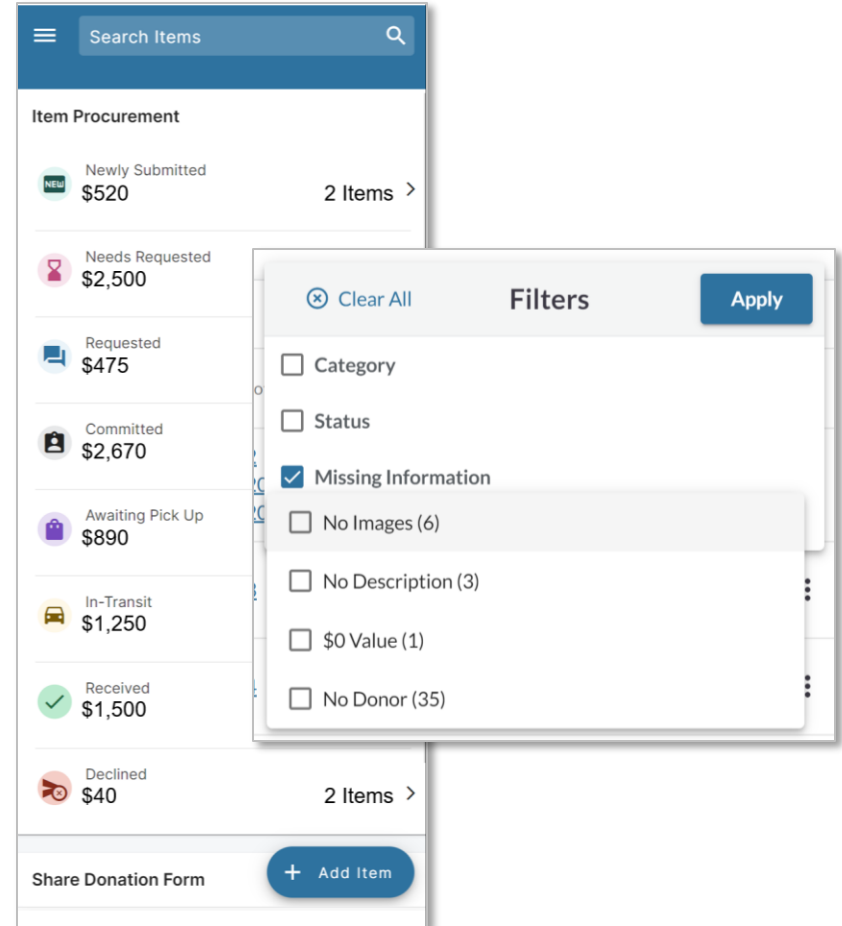
- Drag and drop (no hosting required)
- Add, remove, and reorder photos
- Choose primary photos
- View all images associated with auction
- Huge time saver



Item Procurement

Managing Item Procurement can be a huge headache. Can we make it easier?

- Mobile-friendly Volunteer Tool
- Assign items to Volunteers
- Track progress up through receipt
- Admin filters for missing data (e.g., images, descriptions, \$0 value)
- Online donation form for items & images



Consignment Management

How can we more easily manage Consignment items?

- Track what you owe ...
- ... vs what your minimum accepted bid is

Consignment

What is the cost of this item? *

What is the minimum amount you are willing to sell this item for? *

\$

\$

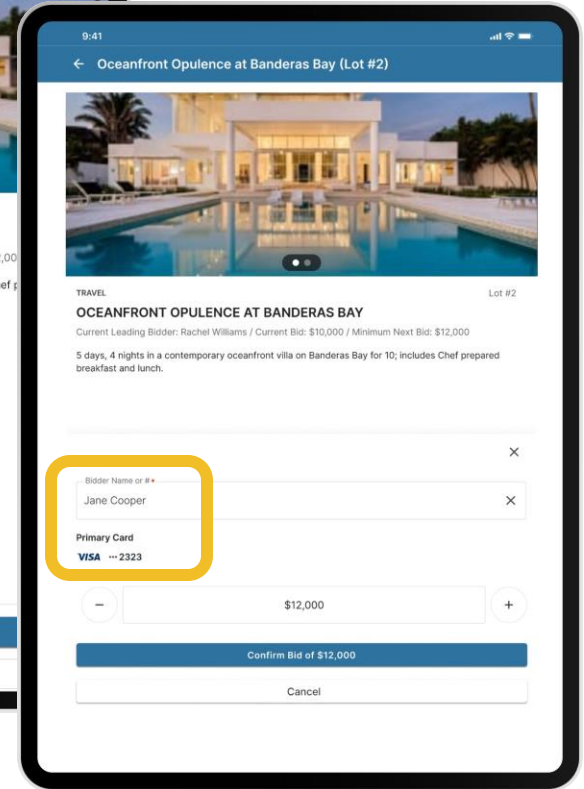
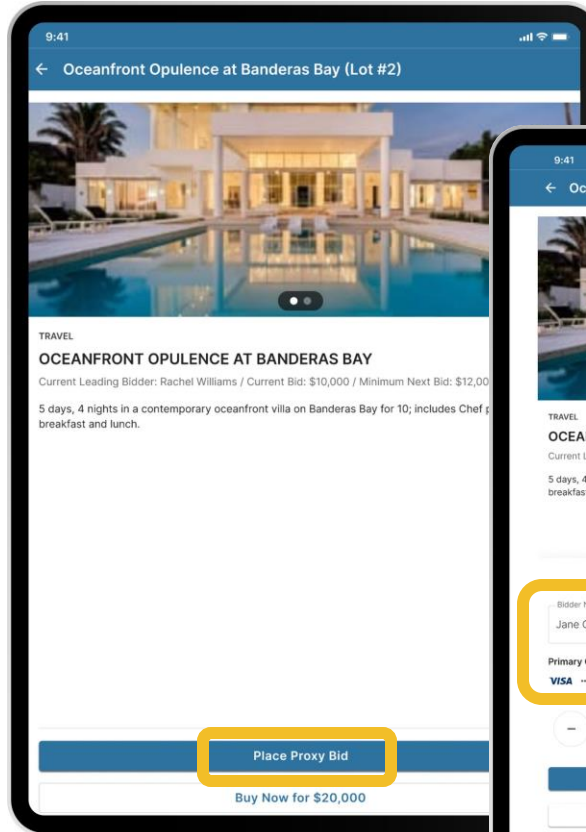
Determines total proceeds for this item

Starting bid cannot be below this amount

Bid Assist

How can we create a more enjoyable, more engaging event experience for guests?

- Enables you to bid, set max bid, or “Buy Now” on behalf of event attendee
- Available to Admins and Volunteers with the Silent Auction Bidding permission



Staggered End Times

How can we maximize revenue from our Silent Auction?

- Adjust end time of an auction lot
- Adjust single lot or in a bulk edit
- View end time within the list & drawer detail
- Send link to direct guests to a pre-sorted list of lots based on end times (requires Custom Messages)
- Maximize auction revenue

The screenshot shows the 'Lots' management interface. A modal window titled 'New Close Date & Time' is open, displaying a date and time selector set to 'September 30, 2025 at 10:00 CST'. Below the modal, a table lists auction lots with columns for Lot Name, Buy Now, Close Time, and Status. The 'Change Close Time' button is highlighted, and a dropdown menu shows the current close time for a lot and the option to change it.

Lot Name	Buy Now	Close Time	Status
Two Floor Seats to Madonna Concert at Barclay's Center in Brooklyn, NY	\$3,750	12:00 PM CST 9/21/25	Ready
Louis Vuitton Keepall Bandouliere 45	\$6,000	9:30 PM CST 9/27/25	Ready
Historic Football Greats Hall of Famers on a Helmet	\$6,250	10:00 PM CST 9/30/25	Draft

The screenshot shows the 'Sort List' modal with the following options:

- Lot Number: Lowest to Highest
- Time: Ending Soonest
- Bid Count: Lowest to Highest
- Bid Count: Highest to Lowest
- Price: Highest to Lowest

The screenshot shows a lot detail view for a 'Diamond Necklace'. The lot is marked as 'Winning' and has a countdown timer: 'Closes in 7m 9s • Today 2:55 PM'.

Last Chance Auction (Fire Sale)

How can we sell all of our Auction Lots before the event ends?

- 'Last Chance' allows you to convert unsold Lots in to discounted 'Buy Now' options
- Run for 15-60 minutes to clean out inventory before the event ends

Enable last chance on lots that don't sell at auction close
You can turn this off for individual lots

Discount from starting bid
20 %

Display as a discount to supporters

Last chance end time
15 minutes after auction
30 minutes after auction
45 minutes after auction
1 hour after auction

Enable last chance on lots that don't sell at auction close
You can turn this off for individual lots

Discount from starting bid
20 %

Display as a discount to supporters

Last chance end time
1 hour after auction

TRAVEL #1
Napa Valley Backroads Experience
\$1,500 ~~\$2,500~~

Item Promotion

How can we maximize revenue from our Silent Auction?

- Elevate visibility to multiple ways to give
- Provide "low friction" awareness without distracting from Silent Auction
- Includes Fixed Price, Raffle, and Donate-to-Vote items
- Drive giving beyond the auction

The screenshot shows a grid of auction items. A yellow box highlights a 'Raffle' tab. The items include:

- FASHION & JEWELRY Lot #111: Blue Nile Diamond Solitaire Necklace \$600
- FASHION & JEWELRY Lot #112: Burberry Note Medium Leather & Vintage Check... \$775
- FASHION & JEWELRY Lot #113: Tiffany & Co Tiffany Diamond Knot Earrings in Rose Gold \$1,400
- FASHION & JEWELRY Lot #114: Ananya 18-karat gold, jade and diamond bracelet \$2,790
- TRAVEL Lot #115: 1 Week Stay in Lake Como, Italy \$1,400
- TRAVEL Lot #117: Italian Adventure \$5,000
- TRAVEL Lot #118: 4 Day Golf Trip to Scottsdale Arizona \$1,500
- TRAVEL Lot #119: African Safari Dream Vacation \$2,500
- TRAVEL Lot #120: Ireland Adventure \$5,250
- FOOD & BEVERAGE Lot #124: Dinner and a Movie at JJ's Clubhouse and AMC \$5
- OTHER Lot #125: Amazon Echo 4th Gen \$85
- SPORTS & ENTERTAINMENT Lot #126: Driving Range Passes \$80
- SPORTS & ENTERTAINMENT Lot #127: Two Timberwolves Floor Seats to 2021-2022 Season \$1,000
- OTHER Lot #128: Silver Apple Watch \$150
- OTHER Lot #129: 2 Hours of Home Cleaning \$40
- 0 SOLD: Two Round Trip Airline Tickets
- 0 SOLD: Own a Luxury Car for the Day
- 0 SOLD: Nashville Weekend...
- 0 SOLD: Principal for the Day
- 0 SOLD: Golden
- GIFT CERTIFICATES Lot #121: Bacchus Gift Certificate \$50
- TRAVEL Lot #122: Tuscany Getaway \$2,500
- TRAVEL Lot #123: Aloha! Enjoy Four Nights in Maui! \$1,750
- FOOD & BEVERAGE Lot #124: Dinner and a Movie at JJ's
- OTHER Lot #125: Amazon Echo 4th Gen
- SPORTS & ENTERTAINMENT Lot #126: Driving Range Passes

The screenshot shows a grid of auction items. A yellow box highlights a 'Donate to Vote' tab. The items include:

- GIFT CERTIFICATES Lot #121: Bacchus Gift Certificate \$50
- TRAVEL Lot #122: Tuscany Getaway \$2,500
- TRAVEL Lot #123: Aloha! Enjoy Four Nights in Maui! \$1,750
- FOOD & BEVERAGE Lot #124: Dinner and a Movie at JJ's Clubhouse and AMC \$5
- OTHER Lot #125: Amazon Echo 4th Gen \$85
- SPORTS & ENTERTAINMENT Lot #126: Driving Range Passes \$80
- SPORTS & ENTERTAINMENT Lot #127: Two Timberwolves Floor Seats to 2021-2022 Season \$1,000
- OTHER Lot #128: Silver Apple Watch \$150
- OTHER Lot #129: 2 Hours of Home Cleaning \$40
- Vote for Next Year's Theme: We want you to help decide next year's...
- Name the School Mascot
- Vote for the Teacher of the Year

Digital Item Pick-Up

How can we make Item Pick-Up even easier?

- Mark an item as a physical or digital gift certificate
- Email winner with redemption instructions
- Include an image of digital gift certificate
- Check-out Volunteers will see if item is a digital item or a physical gift certificate

Gift Certificate or Voucher
E-gift card, membership, vacation package, etc.

Automatically email gift certificate information to the winning supporter *(OneCause Recommendation)* [Preview](#)

Requires email delivery pickup option

Redemption Instructions

Please contact Indy Artists at art@indyart.com to schedule your session.

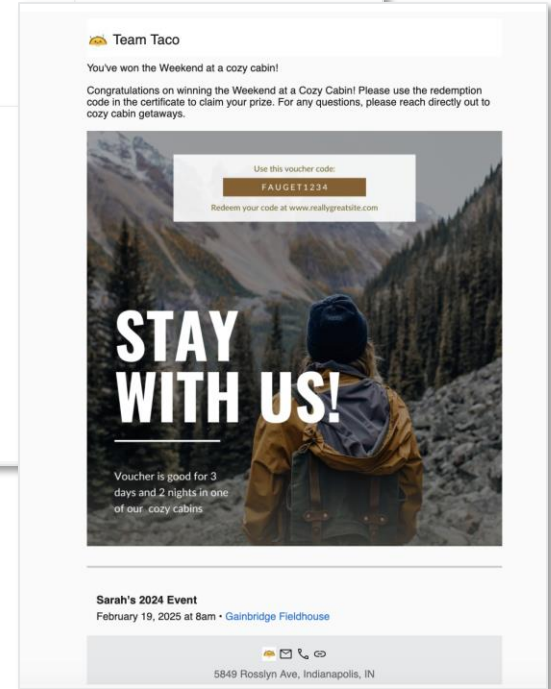

Include the following in the digital certificate

Item Restrictions

Donor Name

Donor Contact Information

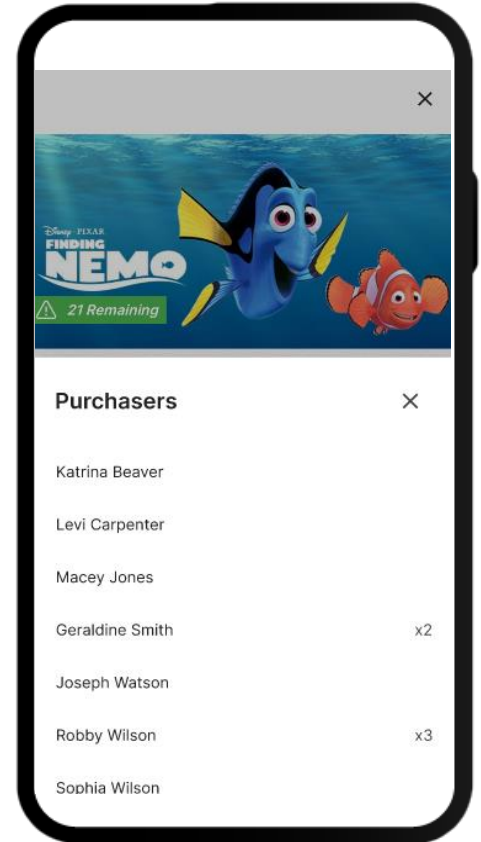
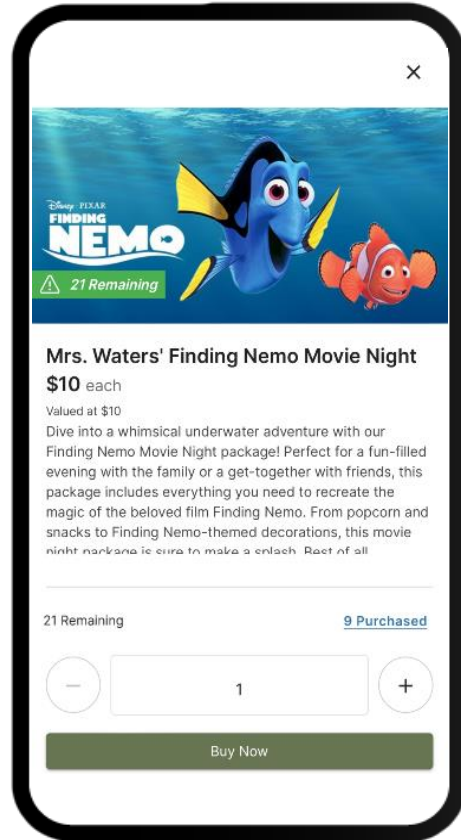
Upload Gift Certificate (Optional)



Sign-Up Parties

How can we use social influence to drive sales for fixed price items?

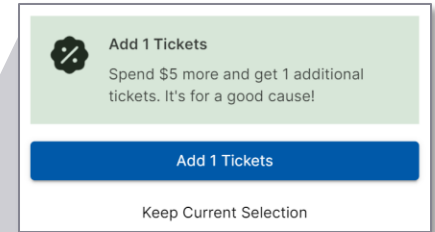
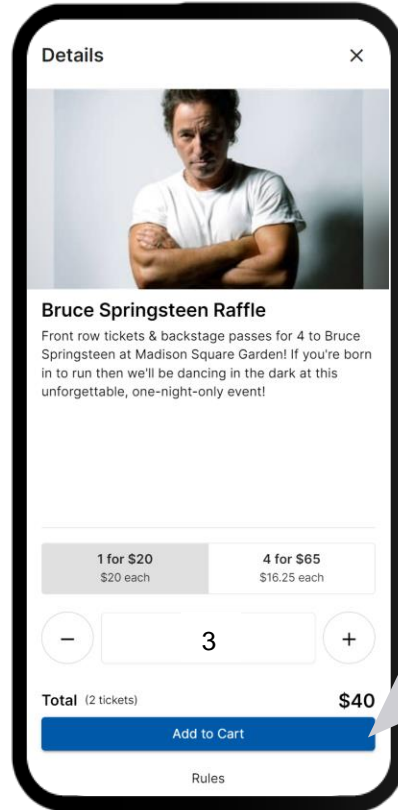
- Enable supporters to see who has purchased a fixed price item
- Drive fixed price item revenue
- Configuration display on event site & in Volunteer Tools



Raffles

How can we increase Raffle sales and make the entire Raffle process even easier?

- Offer multiple raffles
- Configure payment requirements
- Price breaks with “Suggestive Sell”
- Select winner (randomized)
- Withdraw options
- Message raffle winners



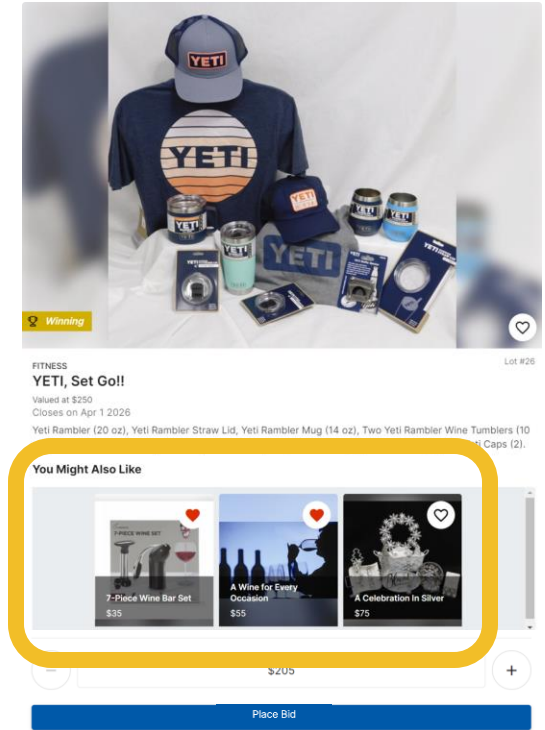
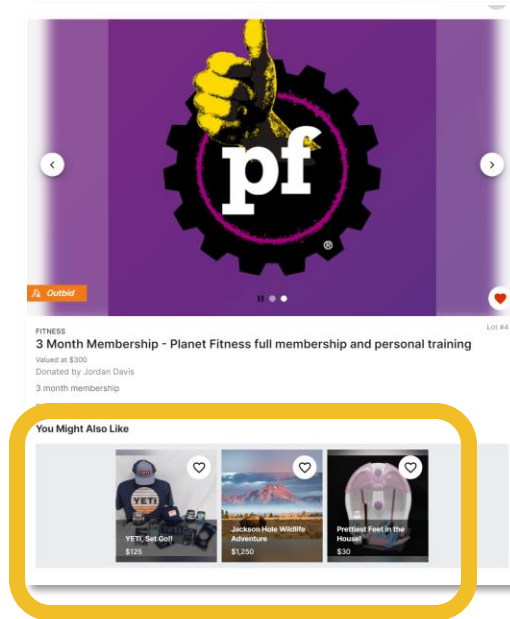
KEY UPDATES &
ENHANCEMENTS

ARTIFICIAL INTELLIGENCE

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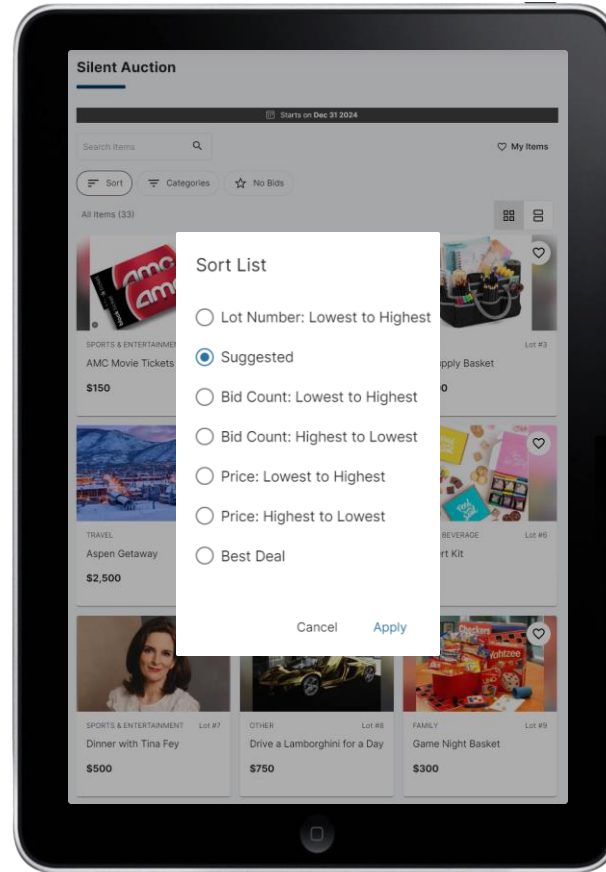
Recommended Lots

- As a guest browses an auction lot, AI identifies and serves up three similar lots
- No coding, no configuration
- Works even before bidding begins
- Drives more auction engagement & revenue



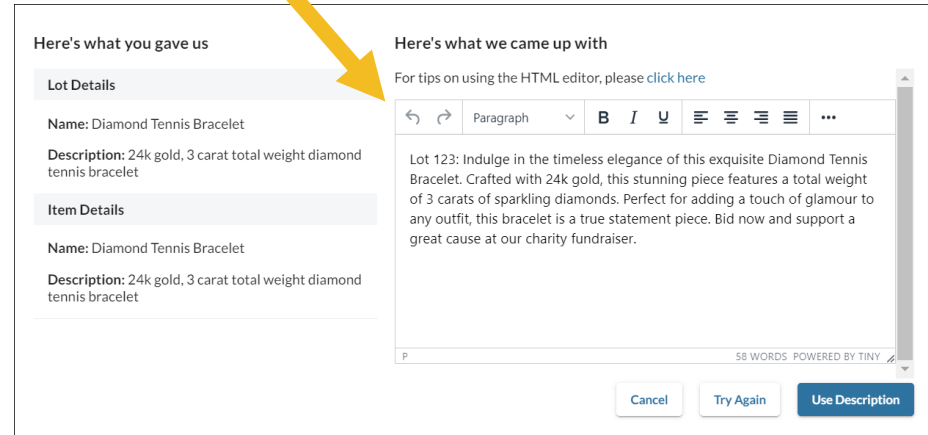
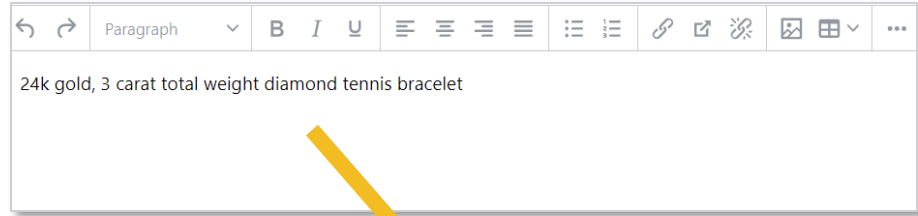
Suggested Sort

- AI learns guest behavior
- Serves up auction lots guests are most likely to bid on
- Adjusts to create a unique auction experience for each guest
- Especially valuable for medium to large auctions, which long list of auction packages



Description Generators

- Effortlessly craft compelling auction lot descriptions
- Edit copy prior to publishing
- Also available to help with:
 - Event & Online Campaign Stories
 - Fixed Price Item Descriptions
 - Raffle Descriptions
 - Donation Descriptions
(Targeted Achievements & Impact Levels)



KEY UPDATES &
ENHANCEMENTS

PAYMENTS & RECONCILIATION


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Digital Wallet

How can I increase donation conversion?

- Make it faster and easier to donate
- No need to enter card or billing information
- Universally available payment
- Now with PayPal & Venmo for singular transactions

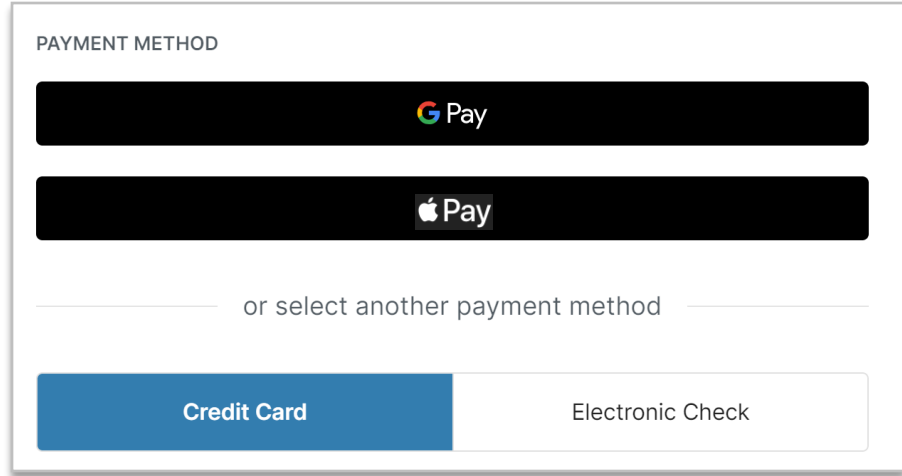
PAYMENT METHOD

 Pay

 Pay

or select another payment method

Credit Card Electronic Check



Reconciliation

Why does it have to be so hard to balance our fundraising against our bank account?

- Reconciliation Dashboard
- Fund tracking

Funds				Create Fund
Active	Name	Raised / Goal ↑	External ID	
✓ Active	Annual Fund 2022-2023	\$127,879 / \$1,000,000	B45784412	⋮
	Annual Fund 2023-2024	\$0 / \$1,100,000	B495687	⋮
✓ Active	Endowment Fund	\$1,255,520 / \$10,000,000	B4447758	⋮

1 - 3 of 3 | < >

Credit Card Reconciliation Dashboard

Settlement Date: Last 7 Days

Total Payments

Settlement Date	Total Amount
2023-07-22	\$30.70
2023-07-21	\$5.08
2023-07-20	\$0
2023-07-19	\$11.00
2023-07-18	\$0
2023-07-17	\$0
2023-07-16	\$0

Payments by Event

Name	Total Amount
1 Ambassador Fundraising...	\$5.08
2 Benton Academy	\$41.70

Payments by Fundrsg Pages

No Results

Payments

Settleme Date	Amount	Payment Type	Ach Reference Number	Check #	Note	Payer Name	Payment Date	Batch ID	Pending	Transaction ID	Transaction Error
1 2023-07-22	\$12.00	VISA	11729305			Joe Duca	2023-07-21...	653259	No	11729305	
2 2023-07-22	\$18.70	VISA	11729306			Joe Duca	2023-07-21...	653259	No	11729306	
3 2023-07-20	\$5.08	VISA	11725790			Joe Duca	2023-07-19...	672302	No	11725790	
4 2023-07-18	\$11.00	VISA	11722355			Joe Duca	2023-07-17...	878173	No	11722355	

Payments by Method

Payment Method	Total Amount
1 VISA	\$46.78

Payments by Fund

No Results

Payments by Proceeds Type

No Results

Payments by Settlement Batch

Batch ID	Total Amount
1 653259	\$30.70
2 878173	\$11.00
3 672302	\$5.08

Payments by Merch Account

Merchant Account ID	Total Amount
1 1839510e-3126-43c4-bf6...	\$46.78

KEY UPDATES &
ENHANCEMENTS

REPORTING & ANALYTICS

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Enhanced Reporting

- MORE information available (Supporters, Purchases, & Payments)
 - Donations
 - Fixed Price Purchases
 - Raffle Ticket Purchases
 - Sponsorships
 - Tickets
- MORE logical flow of information
- NEW exports
 - Live Auction Proceeds, Silent Auction Proceeds, Sold Auction Lots
- AND actionable insights available in real-time Analytics

The screenshot displays the '16th Annual Night of Gratitude' fundraising dashboard. At the top, there are navigation links for 'All Events', 'View Event Page', 'Quick Links', 'Proceeds Manager' (with a notification badge), and 'Show Manager'. The main section is titled 'PROCEEDS' and features a 'Proceeds by Type' chart. The chart shows a total of \$235,001/\$400,000 (59%) with covered costs of \$2,559.71. The breakdown is as follows:

Category	Amount
Tickets	\$16,250
Sponsorships	\$72,500
Silent Auction	\$750
Live Auction	\$0
Raffles	\$846
Fixed Price Items	\$2,090
Misc. Charges	\$0
Donations	\$142,565 (Including \$51,200 in commitments)

Below the chart, the 'Payment Status' is summarized:

PAID	UNPAID
\$134,948.00	\$25,353.00

A 'REFUNDED' status is also shown as \$1,550.00. On the right side, there are sections for 'Fundraising Alerts' (listing dates from Thu, Jul 18 to Today) and 'Fundraising Summaries' (listing dates from Tue, Jul 23 to Today as of 3:25 PM EST). At the bottom right, a 'Download Reports' section provides buttons for various data exports:

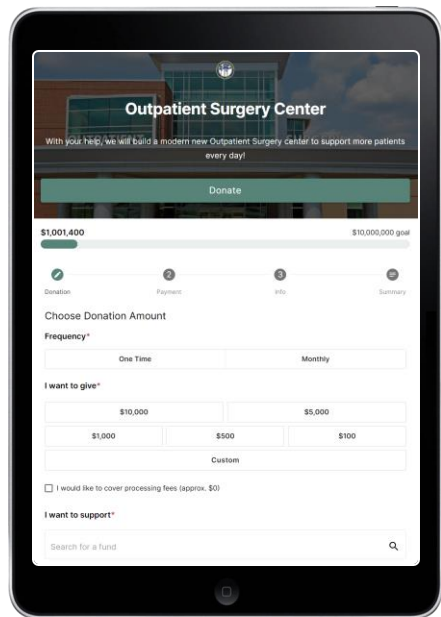
All Proceeds	Donations
Spotter Tool	Commitments
Silent Auction Bids	Live Auction Bids
Silent Auction Proceeds	Live Auction Proceeds
Raffle Ticket Purchases	Fixed Price Purchases
Sponsorships	Sponsor Impressions
Tickets	Registrations
Items per Event Supporter	

KEY UPDATES &
ENHANCEMENTS

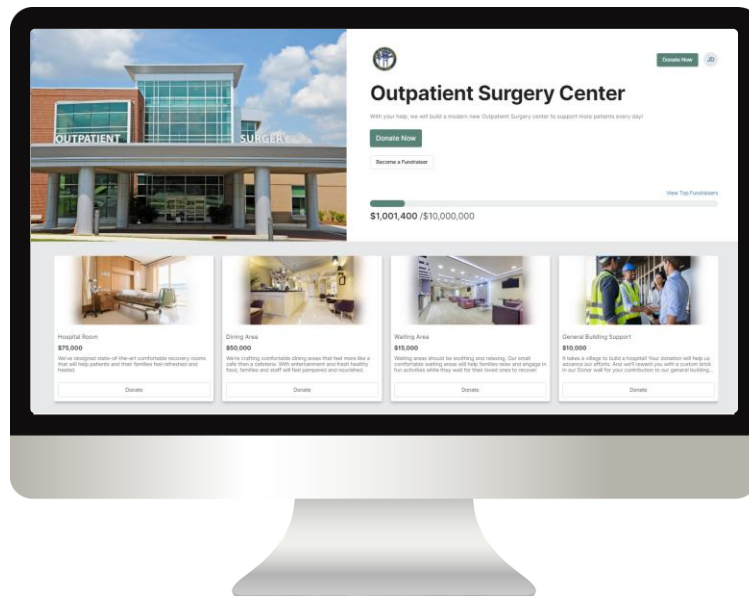
ONLINE FUNDRAISING

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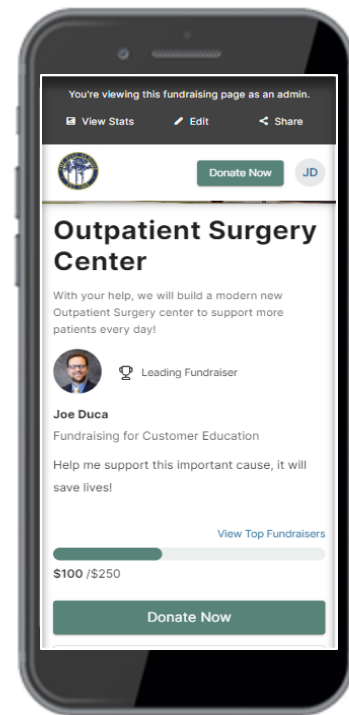
Overview: Online Campaigns



EMBEDDED & MOBILE
DONATION FORMS



ONLINE GIVING
SITES



PERSONAL
FUNDRAISING PAGES

Personal Fundraising Pages

- Basic peer-to-peer fundraising
- Supporters can create their page in less than 60 seconds
- Extends the power of fundraising to friends, family & social networks
- Launch as a follow-up to your event



FINISHING STRONG

Leveraging **Online Giving** to

Drive Real **End-of-Year Impact**



Steve Lausch
Director, Product Marketing
OneCause



Joe Duca
VP, Product Strategy
OneCause



Wednesday, August 14, 2024 | 1:00PM ET

KEY UPDATES &
ENHANCEMENTS

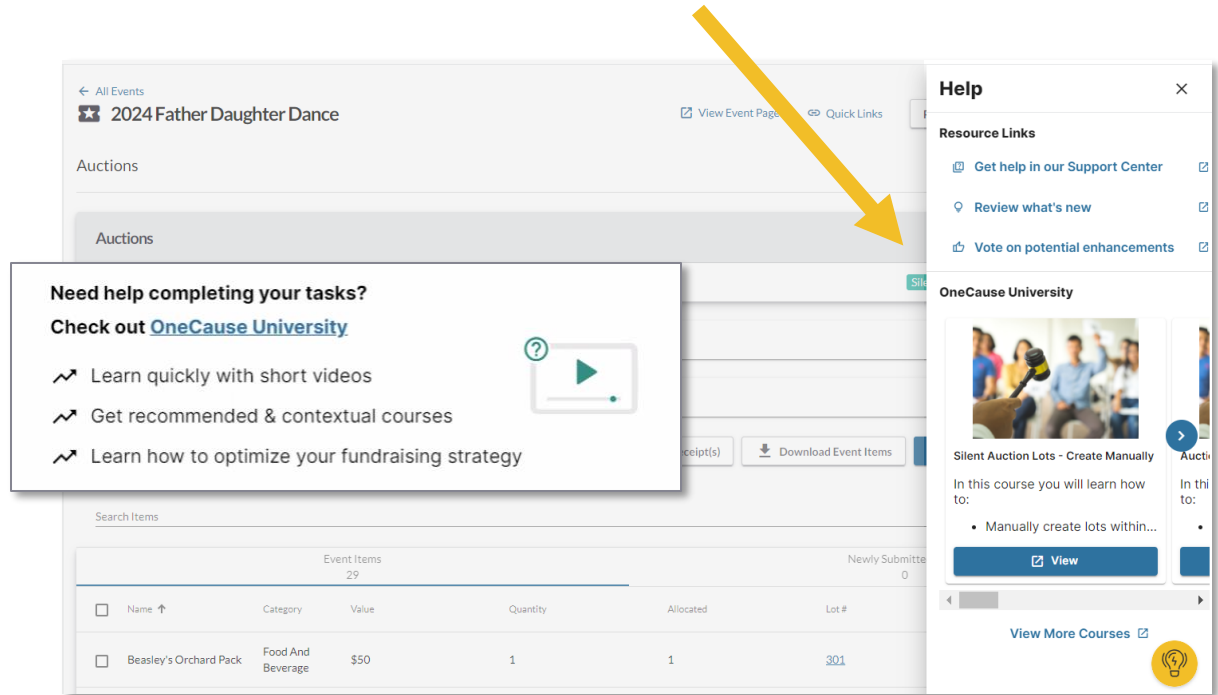
ONECAUSE UNIVERSITY®

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OneCause University

How can we offer even better online resources to help in the moment?

- Shorter, more focused video learning
- Contextualized help in the software
- Resources relevant to the specific page/section you are on



The screenshot displays the OneCause University interface. A yellow arrow points from the top right towards a help overlay. The overlay contains the following text:

Need help completing your tasks?
Check out [OneCause University](#)

- ✔ Learn quickly with short videos
- ✔ Get recommended & contextual courses
- ✔ Learn how to optimize your fundraising strategy

The background interface shows the '2024 Father Daughter Dance' event page. A sidebar on the right is titled 'Help' and contains 'Resource Links':

- Get help in our Support Center
- Review what's new
- Vote on potential enhancements

Below the sidebar, there is a section for 'OneCause University' with a video thumbnail and the text: 'Silent Auction Lots - Create Manually'. Below this, it says 'In this course you will learn how to:' followed by a bullet point: 'Manually create lots within...'. A 'View' button is present. At the bottom of the sidebar, there is a 'View More Courses' link and a lightbulb icon.

The main content area shows a table of 'Event Items' with 29 items. The table has columns for Name, Category, Value, Quantity, Allocated, and Lot #.

<input type="checkbox"/>	Name ↑	Category	Value	Quantity	Allocated	Lot #
<input type="checkbox"/>	Beasley's Orchard Pack	Food And Beverage	\$50	1	1	301

THANK YOU FOR JOINING US

NEXT STEPS?





Raise[®] 2024

Be Our Guest!

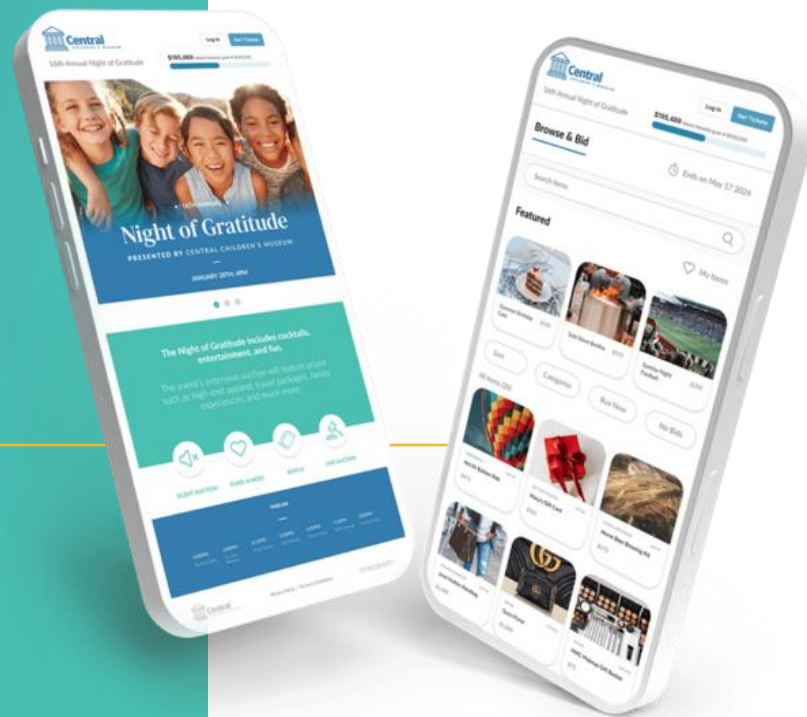
Nashville, TN
September 9 & 10, 2024

www.onecause.com/raise

Promo code **WEBINAR24** for \$200 OFF

Thank you!

Fundraising Software to Raise and Reach More



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Recording and presentation slides will be emailed to all webinar registrants.



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