

# Welcome to our Webinar

## Let's Get Acquainted!

Share in the chat your name, location, and cause or organization, (and the weather in your area)!



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W E B I N A R

# Raise More, Every Time!

Smarter Fundraising Made  
Simple with OneCause

WEDNESDAY, NOVEMBER 5, 2025



**Joe Duca**  
VP, Product Strategy



**Melissa Merriam**  
Director, National Accounts



**Steve Lausch**  
Director,  
Product Marketing



**Mitch Stein**  
Head of Strategy,  
Chariot

# Beyond the Webinar

- ✓ Recording and slides will be sent via email.
- ✓ Visit [OneCause.com/Resources](https://OneCause.com/Resources) for on-demand webinars.
- ✓ Add comment or send emojis in the Chat.
- ✓ Add questions in the Q+A module.
- ✓ Help share on social!

**YOUR FEEDBACK MATTERS!**

Complete the Wrap-Up Survey for  
Your Chance to WIN an Amazon Gift Card



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# What We're Covering Today

- Online Giving
- Payments
- Reporting
- Integrations
- You Spoke, We Listened
- Q + A

# What We're Not Covering

- Tickets & Sponsorships
- Express Check-In & Checkout
- Donations & Appeals
- Silent & Live Auctions

WEBINAR

**Raise More,  
Stress Less:**

Simplify Success with the  
OneCause Fundraising Platform

WEDNESDAY, JULY 23, 2025

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VP, Product Strategy

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ON DEMAND AT  
[ONECAUSE.COM](https://onecause.com)

# RAISE MORE. EVERY TIME.

## Online Giving (Fundraising Pages)



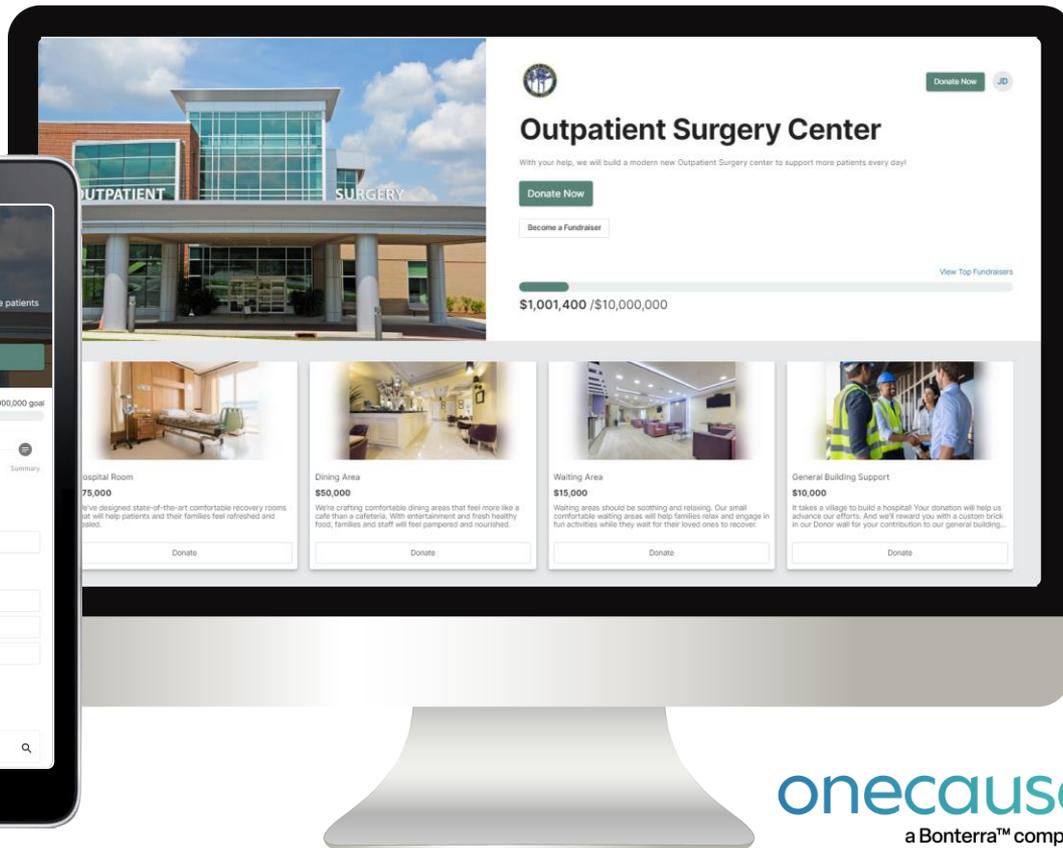
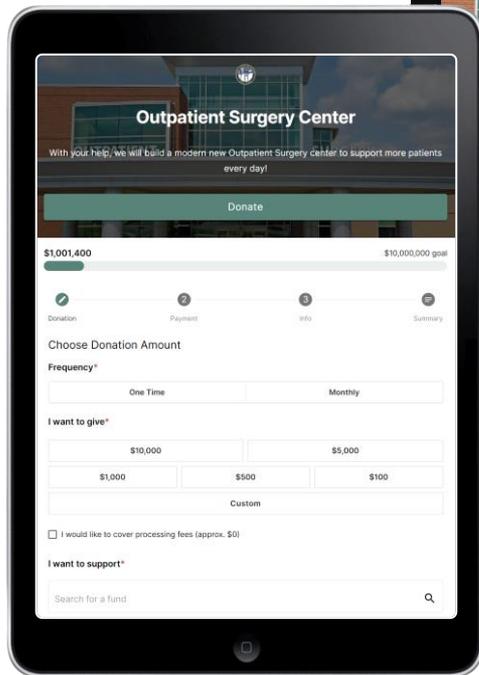
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# Why it matters

- One platform, with all fundraising in one place – not just events.
- A single place for all reconciliation.
- And a single plug in for integrations.
- Innovative fundraising opportunities.
- Ease of learning & management.

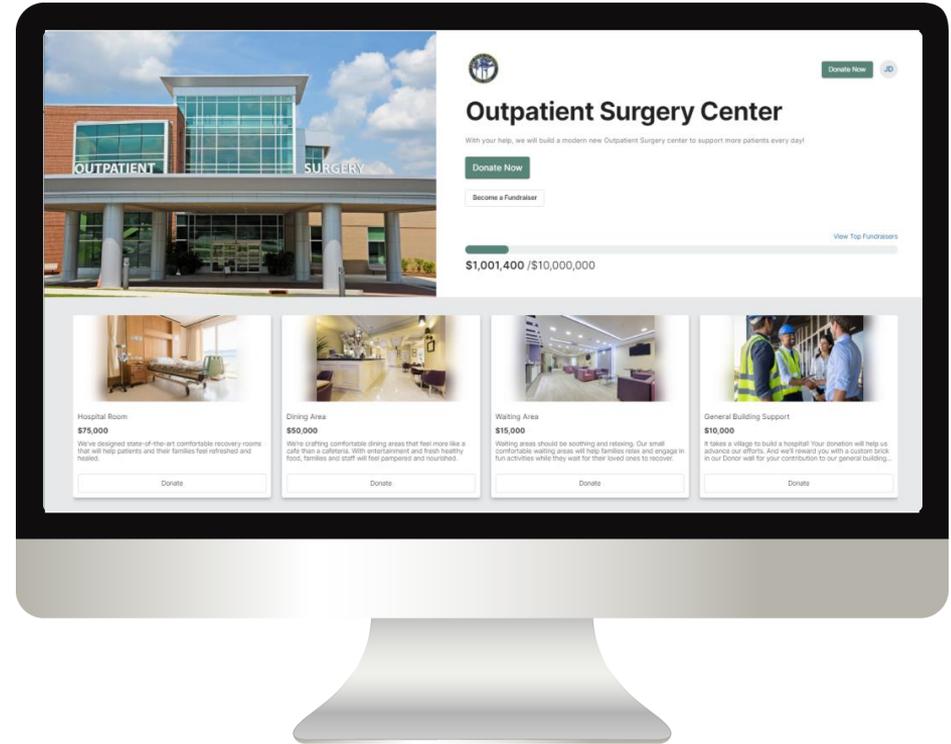


# Online Fundraising & Text2Give<sup>®</sup>



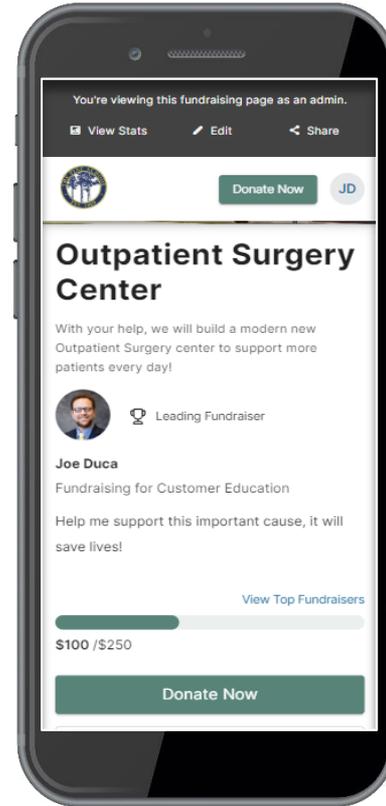
# Online Fundraising & Text2Give<sup>®</sup>

- Donation Forms
  - Online Giving Sites
    - Configurable branding
    - Impact levels
- Other great options for all:
- Honorariums & memorials
  - Matching Gifts
  - Connect to event giving & interactive slide



# Online Fundraising & Text2Give<sup>®</sup>

- Donation Forms
- Online Giving Sites
- Personal Fundraising Pages
  - Easy way to launch ambassador and peer-to-peer fundraising
  - Set up a page in less than 60 secs
  - Progress displayed on fundraising thermometer, top donor leaderboard & real-time analytics



# Personal Fundraisers List

NEW

- View all supporters who have volunteered to fundraise on your behalf
- Edit personal fundraiser information, including image, name, message, and goal

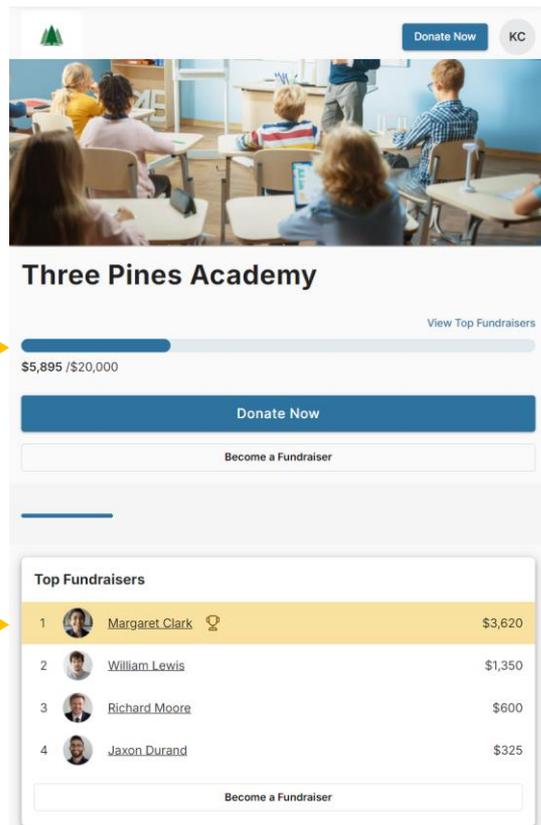
The screenshot displays the 'Personal Fundraisers' interface. On the left is a navigation sidebar with options: Site Setup, Basic Details, Site Design, Donation Setup, Payment Settings, Donations, Personal Fundraisers (selected), and Communications. The main content area shows a table of fundraisers with columns for Image, Name, Link To Page, Percent To Goal, and Personal Fundraiser's Goal. Two records are visible: Jaxon Durand with a goal of \$5,000 and Margaret Clark with a goal of \$1,000. An 'Edit Personal Fundraiser' modal is open, showing a form to update the information for Jaxon Durand, including fields for Name, Personal Message, and Goal (\$ 5000).

Image	Name	Link To Page	Percent To Goal	Personal Fundraiser's Goal	
	Jaxon Durand	onecau.se/_bnb	0%	\$5,000	⋮
	Margaret Clark	onecau.se/_kn1	0%	\$1,000	⋮

# Leaderboards

UPDATED

- Leaderboards can now be turned ON or OFF on your Fundraising Pages
- Recognize those who have supported your mission most
- Select information to display, including:
  - Fundraising thermometer
  - Donor Name
  - Donation Amount
  - Timestamp



The screenshot shows a fundraising page for "Three Pines Academy". At the top right, there are "Donate Now" and "KC" buttons. Below the header is a photo of a classroom. A fundraising thermometer shows a progress bar with the text "\$5,895 / \$20,000" and a "View Top Fundraisers" link. Below the thermometer are "Donate Now" and "Become a Fundraiser" buttons. A "Top Fundraisers" section is highlighted with a yellow background and contains a table of donor information. A "Become a Fundraiser" button is at the bottom of this section. Yellow arrows point to the thermometer, the top fundraiser row, and the "Become a Fundraiser" button.

Top Fundraisers		
1	 Margaret Clark 	\$3,620
2	 William Lewis	\$1,350
3	 Richard Moore	\$600
4	 Jaxon Durand	\$325

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## Integrations



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# Salesforce Nonprofit Cloud

COMING SOON

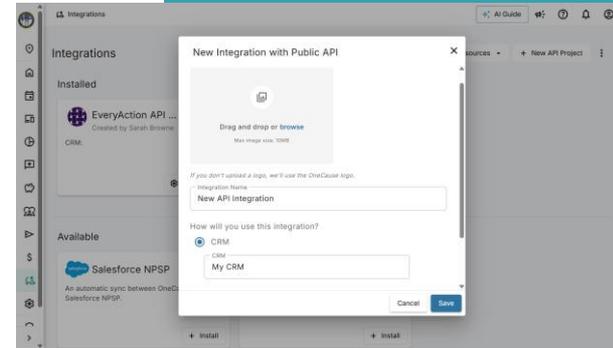
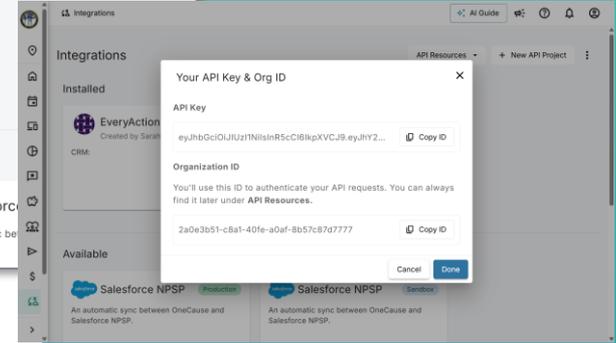
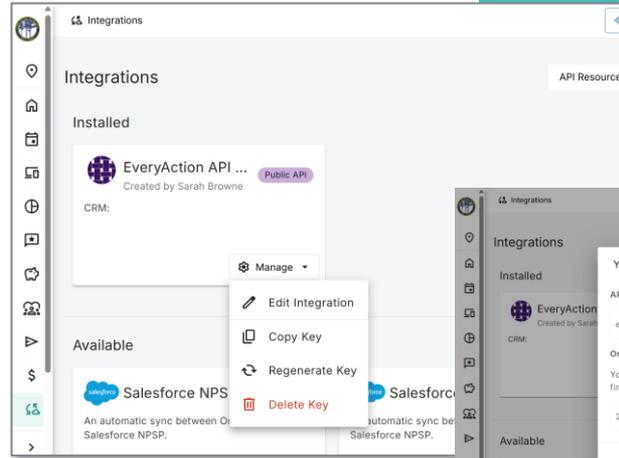
- Direct integration with Salesforce NPC
- Easy in-product custom mapping
- Sync records regularly or on demand
- Sync Log tracks all created, updated, and skipped entries
- Integration with Salesforce Nonprofit Success Pack (NPSP) also available

The screenshot displays the Salesforce Nonprofit Cloud interface. On the left, a sidebar menu includes options like 'Production', 'Salesforce NPC', 'Sync History', 'Data Mapping', 'Campaigns', 'Person Accounts', 'Business Accounts', 'Gift Transactions', 'Errors', 'Error Logs', 'Potential Matches', and 'Skipped Activities'. The 'Person Accounts' option is selected, leading to a 'Person Account Mapping' panel. This panel has tabs for 'Direct' and 'Conditional', with 'Direct' currently active. Below the tabs, a list of fields is shown: 'OneCause Individual Field', 'First Name (first\_name)', 'Last Name (last\_name)', 'Email (identity\_email)', 'Phone (phone)', 'Street Address (address)', and 'City (city)'. To the right of the mapping panel, an 'Integrations' box lists three entries: 'SALESFORCE NPSP PRODUCTION ID' (None), 'SALESFORCE NPSP SANDBOX ID' (0035Y00007Qc3vBQAR), and 'SALESFORCE NPC PRODUCTION ID' (None). At the bottom, an 'Installed' section shows two 'Salesforce NPC' integration cards, one for 'Production' and one for 'Sandbox', both marked as 'Connected' and featuring a 'Manage' button.

# Public API

NEW

- Pull supporter, transaction, and event data directly into your CRM and other external systems of choice
- Access supporter demographic & activity data
- Sync paid & unpaid transactions
- Pull item donation info for auctions
- Retrieve event guest lists & ticket holders



# RAISE MORE. EVERY TIME.

## Reports

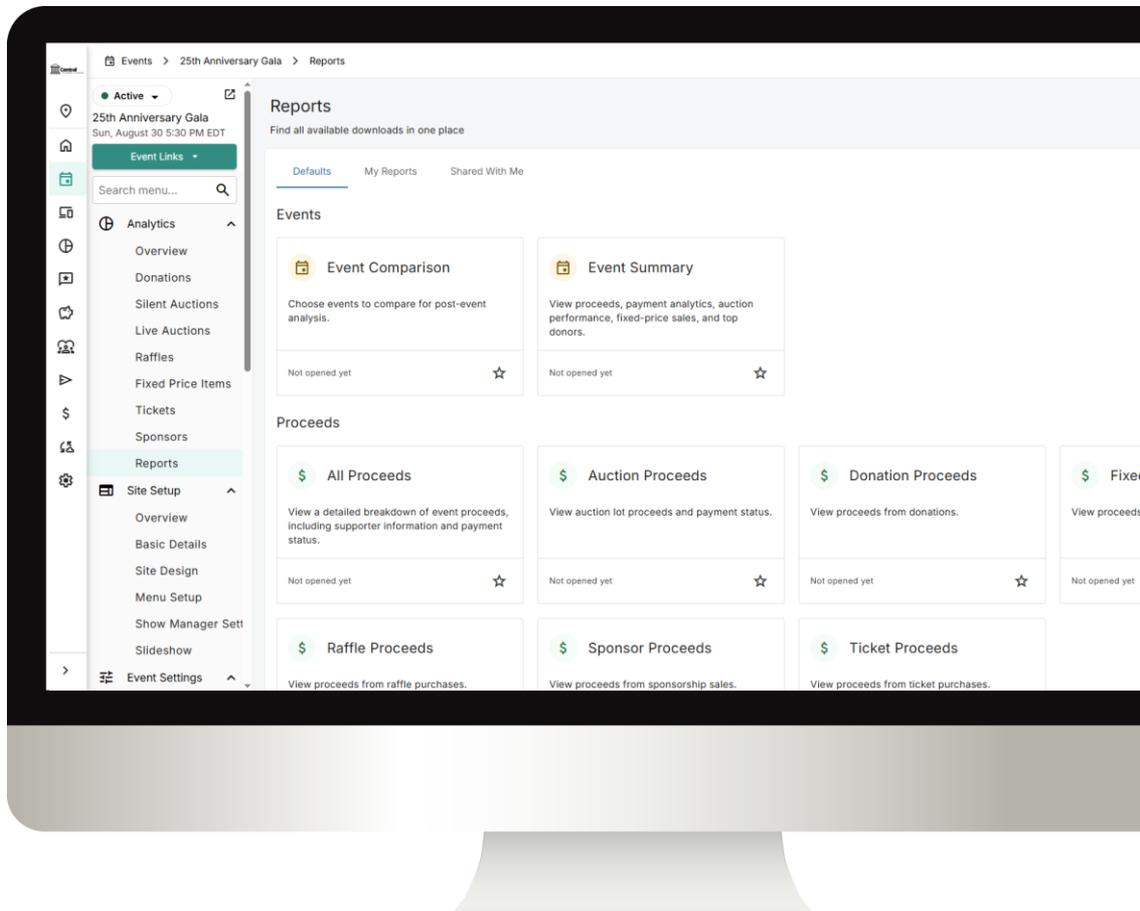


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# Reports Library

NEW

- Houses 20 of the most common fundraising reports
- Save and share configured reports with your staff
- Save favorite reports for easy access



# Configure Reports

NEW

Search...

**Auction Proceeds**

Organization: Product Education Event: 25th Anniversary Gala

Lot #	Lot Name	Winning Bid Amount	Auction Name	Value	Paddle Number	Table Number	First Name	Last Name	Supporter Email	Supporter Phone	Event Name
103	One Week Winnebago Family Vacation of a Lifetime	550.00	Gala Silent Auction	1,100.00	101		Carrie	Smith	csmith@email.com		25th Anniversary Gala
1	6-Night Luxury Stay in Milan, Venice and Rome with Tours for 2	3,500.00	The Pine School Live Auction	7,250.00		6	Joe	Duca	iduca@onecause.com	(612) 718-2298	25th Anniversary Gala

Search...

**Auction Proceeds**

Organization: Product Education Event: 25th Anniversary Gala

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Search columns

- Lot Name
- Winning Bid
- Auction Name
- Value
- Picked Up Date
- Paddle Number
- Table Number
- Supporter Name
- Recognition Name
- Covered Cost
- Sales Tax

- Access your report
- Filter, group, and sort, as needed
- Select columns for display
- Export in your format of choice (CSV, HTML, PDF)

# Comparison Report

NEW

- Quickly and easily compare two events side-by-side
- No more manual work to piece together data in spreadsheets
- Uncover trends across eight comparative tables, including revenue, tickets, attendance, sponsorships, auctions, etc.
- AI-driven summary available
- Export as PDF or HTML

Reports

← Event Comparison ☆

Compare **Event: 2024 Father Daughter Dance** to **Event: 2025 Father Daughter Dance**

### Event Comparison

Revenue Growth 📈 The 2025 dance raised \$1,984 more than 2024, with notable increases in ticket, raffle, fixed price, and silent auction proceeds.  
Participation Changes 📉 Tickets sold slightly increased (+6), but supporter check-ins decreased (-27). Raffle and fixed price participation rose by about 21.5%.  
Donations 📈 Although donor count dipped by one, the average donation amount doubled, boosting total donation proceeds.  
Silent Auction Insights 📉 2025 had fewer lots (26 vs. 30) and bidders (28 vs. 33), but sustained average bids per lot and bidder, with some remote bidders participating.

#### Overall Event Proceeds

Metric	2024 Father Daughter Dance	2025 Father Daughter Dance	+/-	Trend
Tickets	\$3,823.00	\$4,995.00	\$1,172.00	31%
Sponsorships	\$0.00	\$0.00	\$0.00	0%
Donations	\$305.00	\$478.00	\$173.00	57%
Raffles	\$1,860.00	\$2,072.86	\$212.86	11%
Fixed Price Items	\$1,448.00	\$1,784.00	\$336.00	23%
Silent Auctions	\$3,143.00	\$3,568.00	\$425.00	14%
Live Auctions	\$0.00	\$0.00	\$0.00	0%
Covered Costs	\$0.00	\$0.00	\$0.00	0%
Miscellaneous Charges	\$340.00	\$6.00	-\$334.00	-98%
<b>Total</b>	<b>\$10,919.00</b>	<b>\$12,903.86</b>	<b>\$1,984.86</b>	<b>18%</b>

#### Tickets

Metric	2024 Father Daughter Dance	2025 Father Daughter Dance	+/-	Trend
# of Tickets Sold	205	211	6	3%
# of Tickets Comped	22	33	11	50%
# of Supporters Checked In	182	155	-27	-15%
Ticket Proceeds	\$3,823.00	\$4,995.00	\$1,172.00	31%

# RAISE MORE. EVERY TIME.

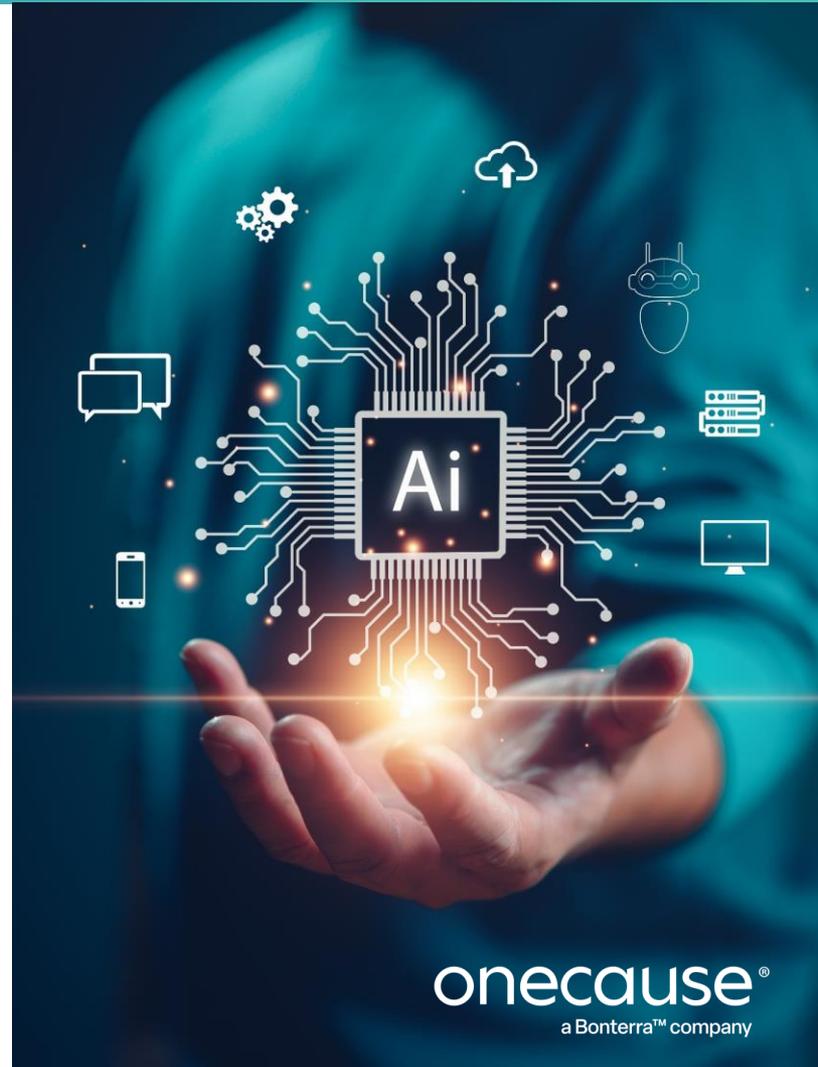
## AI-Driven Fundraising



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# Why it matters

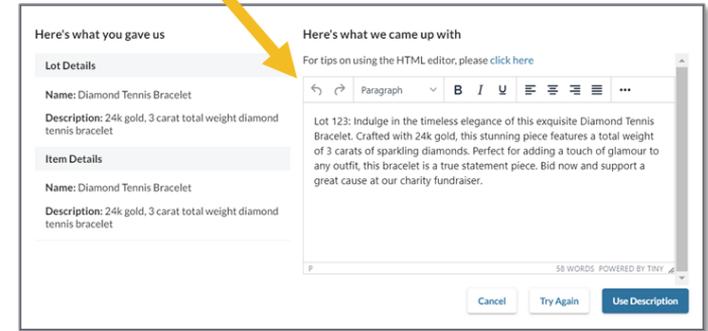
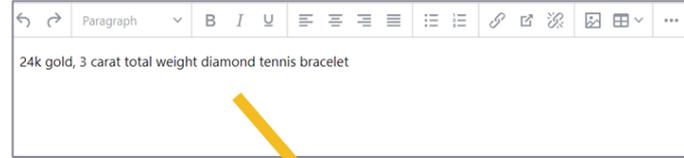
- **Generative AI** can save you hours of time, with better results.
- **Conversational AI** can make it faster to get support and answers when you need it.
- **Predictive and Analytic AI** can make data work better for you.



# OneCause AI™ :: Easier Fundraising

No coding, no programming. It just works.

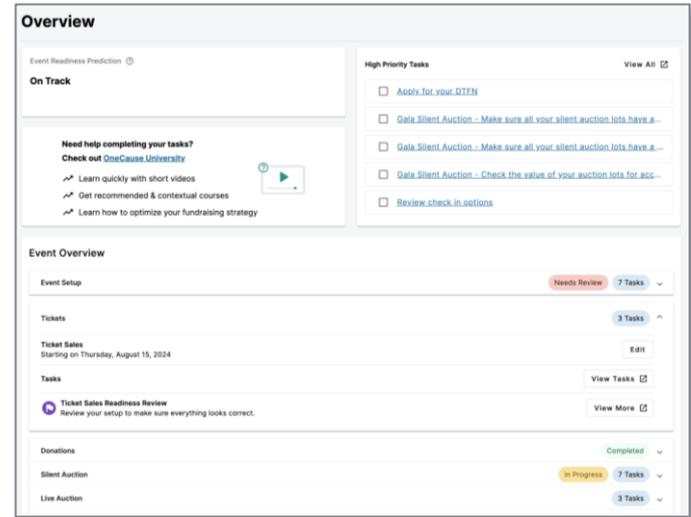
- **Description Generators** automatically craft compelling, marketing-ready descriptions, saving up to eight hours of auction planning time.



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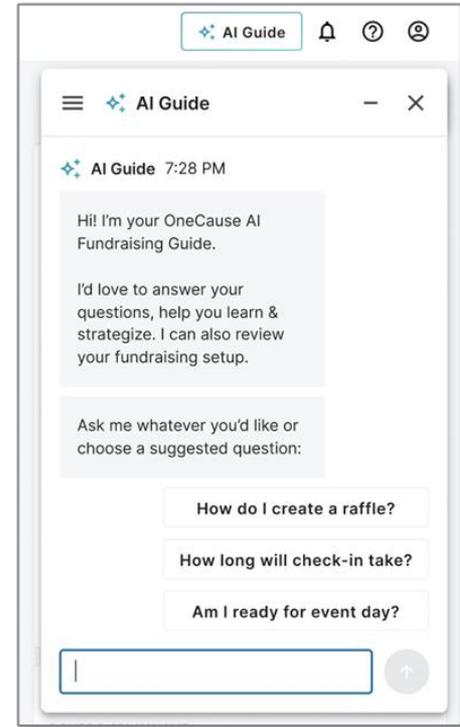
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- **Event Readiness** automatically creates an overview and real-time updates of critical tasks, helping you to ensure every detail is covered.



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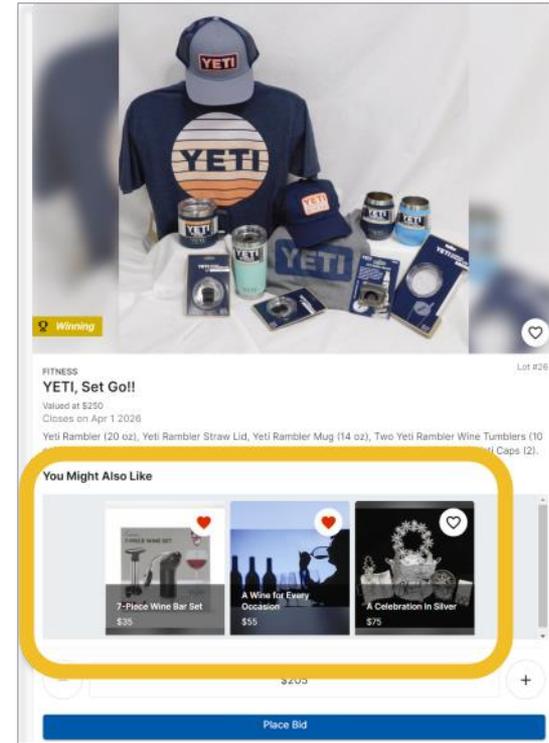
- **Description Generators** automatically craft compelling, marketing-ready descriptions, saving up to eight hours of auction planning time.
- **Event Readiness** automatically creates an overview and real-time updates of critical tasks, helping you to ensure every detail is covered.
- **AI Guide™** is 24/7 virtual assistant that offers real-time support on product, best practice, and fundraising strategy questions.



# OneCause AI™ :: Increasing Revenue

No coding, no programming. It just works.

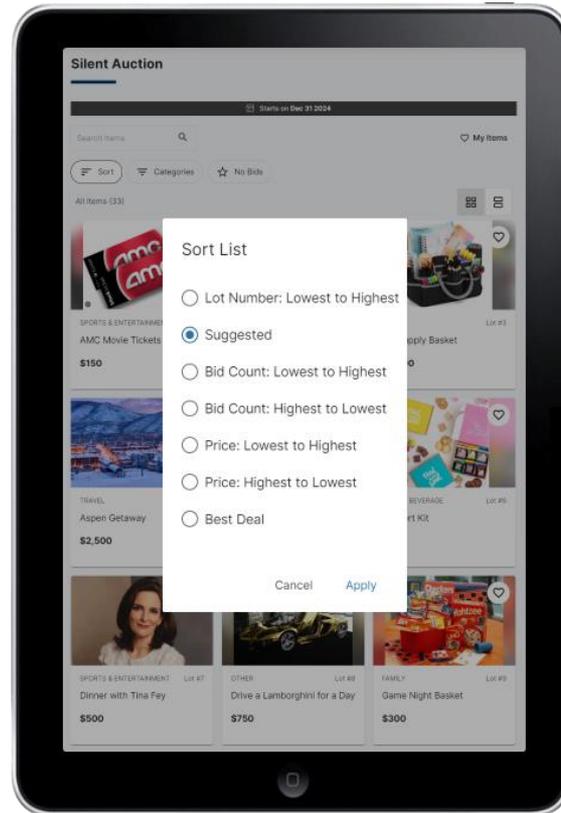
- As guests view an auction item, **Recommended Items** serves up related auction items of similar nature.



# OneCause AI™ :: Increasing Revenue

No coding, no programming.  
It just works.

- As guests view an auction item, **Recommended Items** serves up related auction items of similar nature.
- **Suggested Sort** serves up personalized views of auction packages based on individual viewing/bidding behavior.



# OneCause AI™ :: Increasing Revenue



# RAISE MORE. EVERY TIME.

## Payments

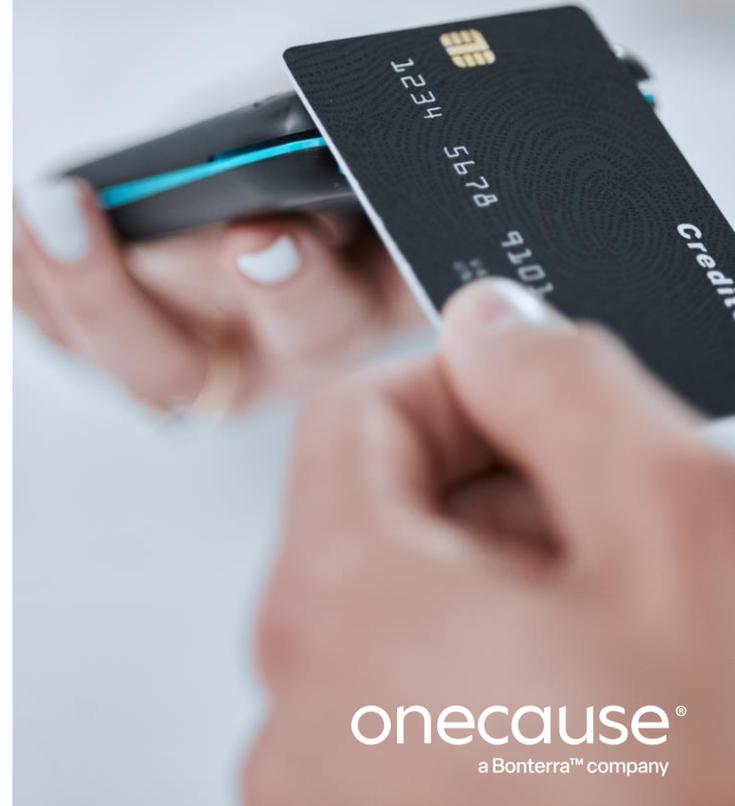


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# Why it matters

## TO YOUR SUPPORTERS

- Donors are consumers. They expect the same transaction experience that they enjoy at the grocery store.



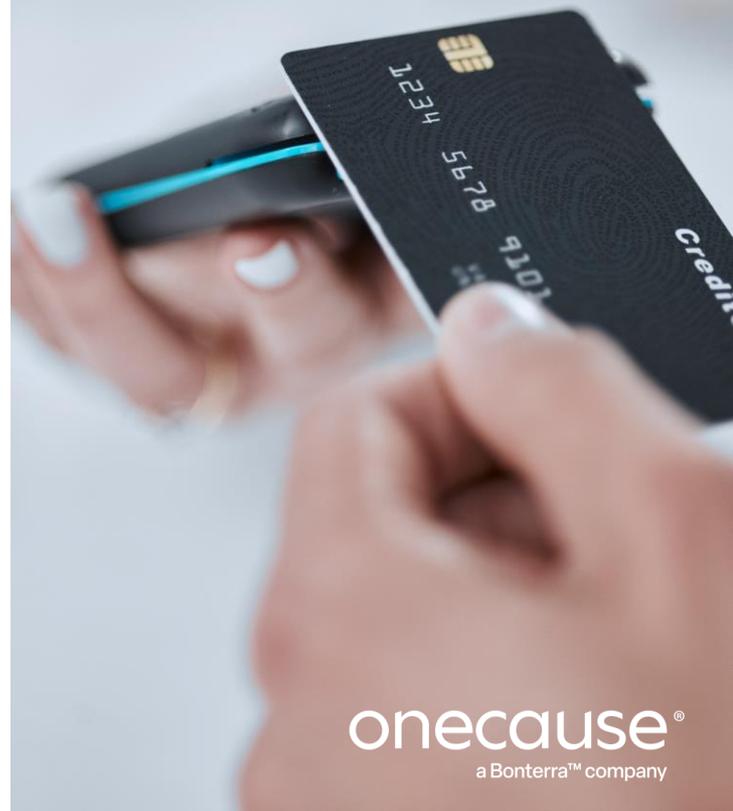
# Why it matters

## TO YOUR SUPPORTERS

- Donors are consumers. They expect the same transaction experience that they enjoy at the grocery store.

## TO YOU & YOUR ORG

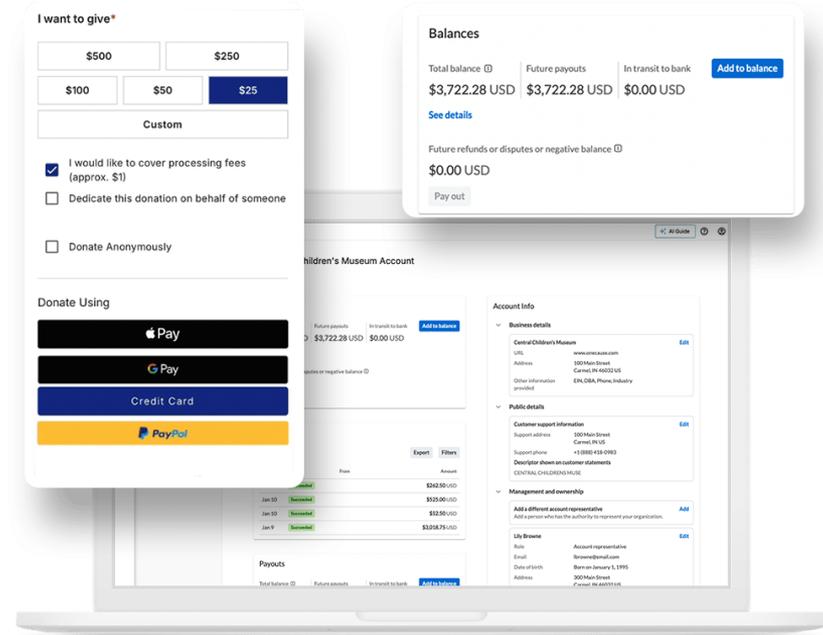
- Without the right technology, your team will spend more time doing more work.
- With the right technology, you will save time and effort with a single place to view and manage everything related to payments.



# OneCause Payments™

NOW WITH  
**stripe®**

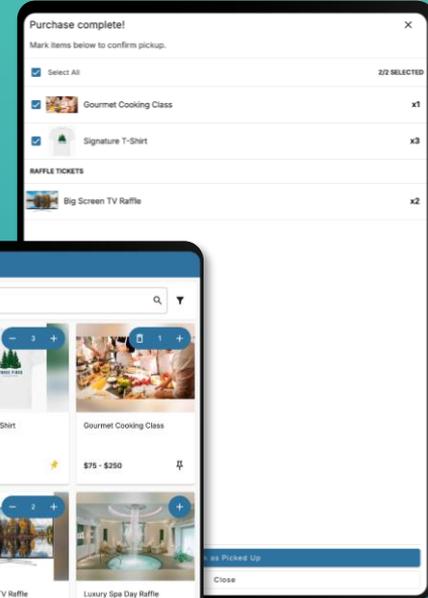
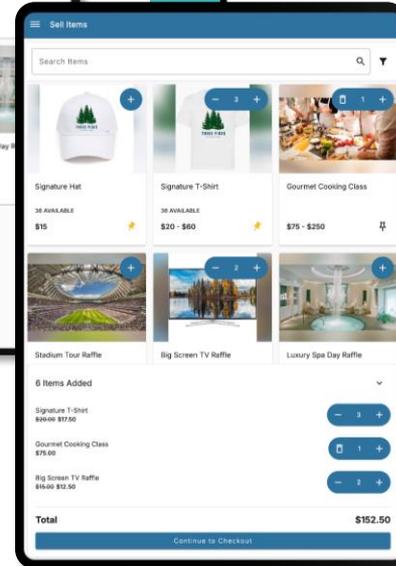
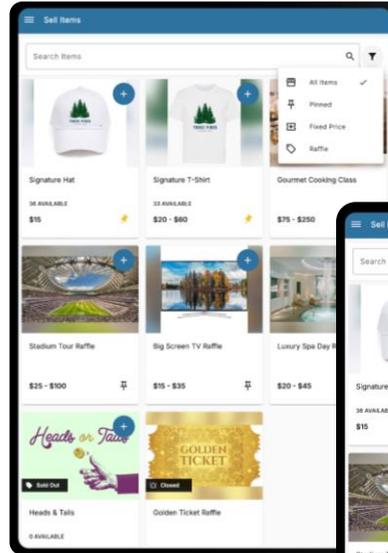
- Enhanced reconciliation
- Recurring gift management
- Fully configurable “Cover Costs”
- Increased fraud protection & reduced chargebacks
- No monthly fees & the industry’s lowest credit card rates (starting at 2%)
- Complete digital wallet for all transactions (ACH, debit & credit cards via Google Pay, Apple Pay, Venmo, PayPal)



# Point of Sale (POS)

NEW

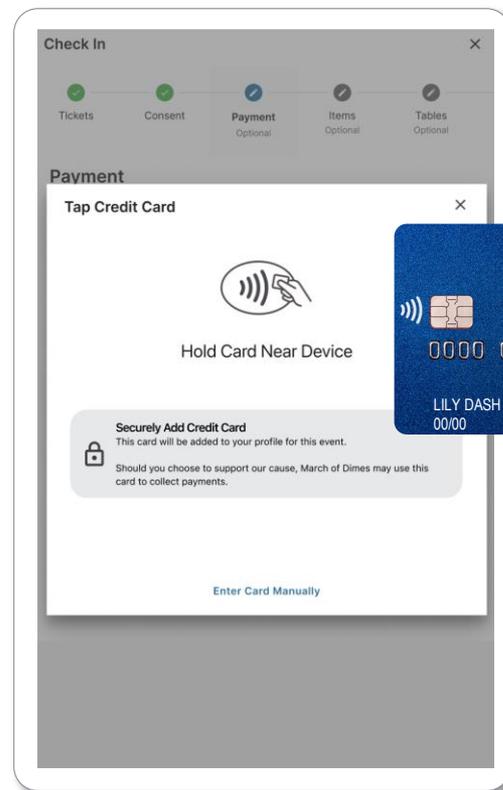
- Easy access in the Event Admin for staff & volunteers
- Sell multiple items in temporary cart
- Process payments via multiple payment types, including credit cards, checks, and ACH



# OneCause Tap™

UPDATED

- Eliminate the need for card scanning hardware
- Capture guest payment information in seconds
- Remove barriers that cause registration bottlenecks
- Deliver a faster, more intuitive experience for supporters



\* Near Field Communication

# RAISE MORE. EVERY TIME.

# DAFpay

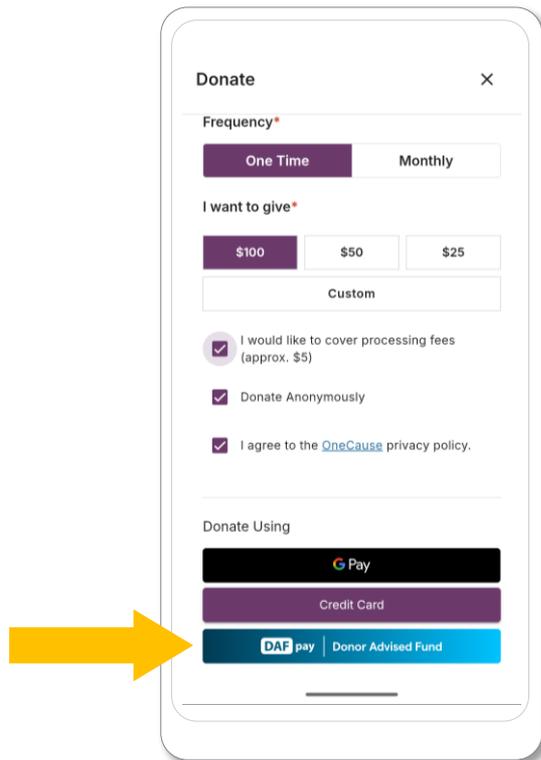
by **Chariot**



Mitch Stein  
**SPECIAL GUEST**

# Donor-Advised Funds (DAFs)

- DAFs have grown beyond \$250B designated for charity
- Historically, the DAF giving process is filled with friction
- Integration with DAFpay by Chariot<sup>®</sup> makes DAF giving easy
- Now available on online giving sites and donation forms on the OneCause Fundraising Platform



# Seamless Experience

NEW

Donate ×

Frequency\*

One Time Monthly

I want to give\*

\$100 \$50 \$25

Custom

I would like to cover processing fees (approx. \$5)

Donate Anonymously

I agree to the [OneCause](#) privacy policy.

Donate Using

Pay Credit Card DAF pay Donor Advised Fund



DAFpay™ ×

Use DAFpay to make a real-time Donor Advised Fund grant request

**Trusted partner**  
Thousands of nonprofits trust DAFpay to simplify Donor Advised Fund giving

**Secure connection**  
Your credentials are encrypted and not seen or stored by DAFpay

**Restricted access**  
Access to your account is limited to a single-session grant request

By selecting 'Continue', you acknowledge that you have read and agree to DAFpay's Terms & Privacy Policy.

Continue



DAFpay™ ×

Select your provider  
Express checkout with your Donor Advised Fund

Search for thousands of providers

Fidelity Charitable

Schwab Charitable

Vanguard Charitable

The Donors Fund

Charityvest

Morgan Stanley GIFT

DAFpay

[What is a Donor Advised Fund?](#)

Names & logos are shown for identification purposes & do not indicate endorsement or sponsorship by your provider.



DAFpay™ ← ×

Fidelity Charitable  
Powered by DAFpay

By authenticating on DAFpay you're enabling a one-time connection to submit this grant

Username

Password

Next

Secure Donor Advised Fund grant requests with DAFpay. [Learn more](#)

# Immediate Value

NEW

FOR NONPROFITS



## Raise More

Identify and convert more donations from high-value donors



## Streamline Processes

Enjoy full visibility while tracking and reporting on DAF grants



## Deepen Engagement

Immediately acknowledge and steward DAF supporters

FOR DAF DONORS



## More Ways to Pay

DAFpay joins credit cards, ACH, Apple/Google Pay, Venmo & PayPal



## Seamless Experience

Donors access DAF account without leaving the donation form



## Confident Giving

Supporters can quickly, intuitively, and securely initiate grants

# RAISE MORE. EVERY TIME.

## You Spoke, We Listened



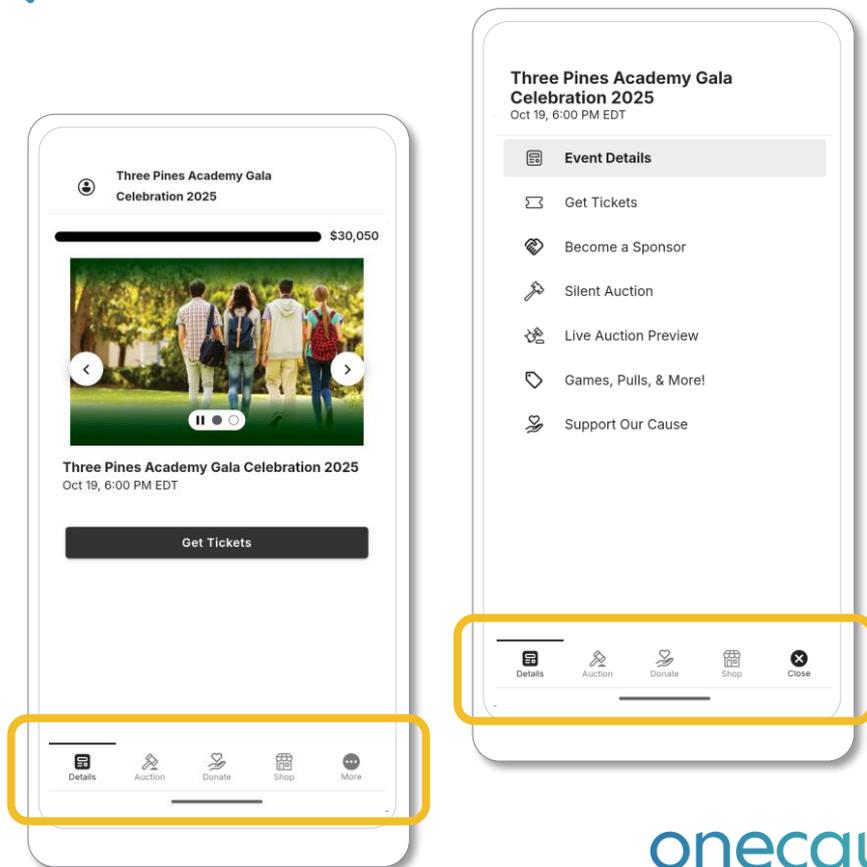
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# Smart Menu (Mobile)

NEW

Can we get more flexibility in how donors navigate the Event Site on their cell phones?

- Access the entire site menu
- Shortcuts and other custom links still available to drive engagement
- Stronger accessibility (ADA)
- Stronger guest experience
- More updates coming soon!

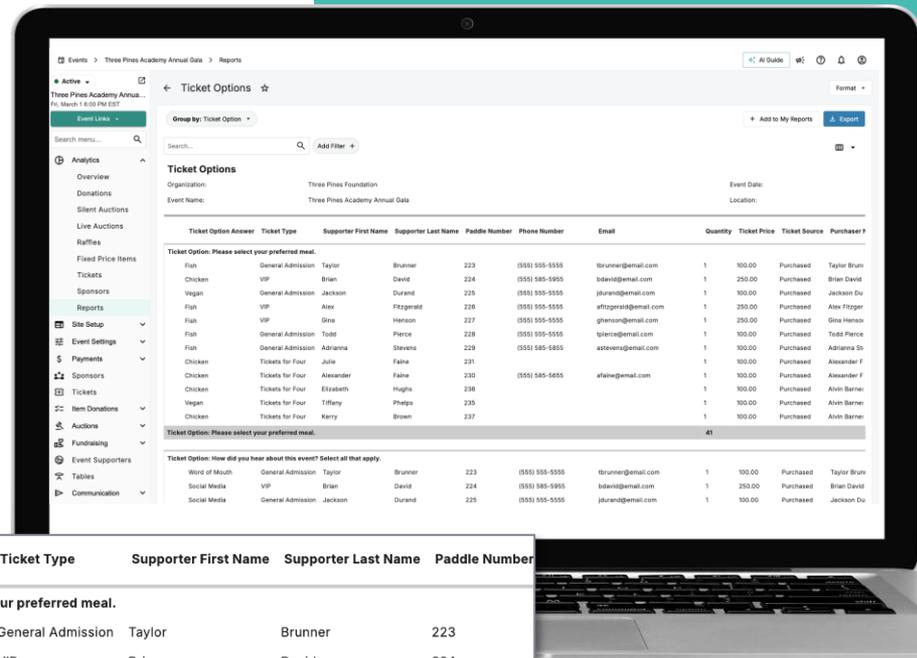


# Ticket Options Report

NEW

Can we get a stronger ticketing report, especially one where we can better report on Ticket Options?

- Filter and search to focus on meal choice and other options
- Customize view and group responses by ticket option, ticket type, table number, and more
- Easily identify missing responses



Ticket Option Answer	Ticket Type	Supporter First Name	Supporter Last Name	Paddle Number
<b>Ticket Option: Please select your preferred meal.</b>				
Fish	General Admission	Taylor	Brunner	223
Chicken	VIP	Brian	David	224
Vegan	General Admission	Jackson	Durand	225
Fish	VIP	Alex	Fitzgerald	226
Fish	VIP	Gina	Henson	227
Fish	General Admission	Todd	Pierce	228
Fish	General Admission	Adrianna	Stevens	229
Chicken	Tickets for Four	Julie	Faine	231

# Admin Interface

UPDATED

You've made some cool updates to the UI over time. Can we get more of that?

- Auctions (LIVE)
- Fixed Price Items & Raffle (NEW)
- Sponsorships (COMING SOON)

The screenshot displays the 'Fixed Price Items' management interface. The table below shows the current items:

Image	Name	Price	Value	Quantity Sold	Purchase Availability	Require Ticket
	Signature T-Shirt	Multiple	\$12.00	17	Scheduled Purchase Time	
	Signature Hat	\$15.00	\$10.00	14	Always Available for Purchase	
	Heads & Tails	\$25.00	\$0.00	0	None	<input checked="" type="checkbox"/>
	Gourmet Cooking Class	Multiple	\$50.00	10	Always Available for Purchase	

The detailed view for the 'Gourmet Cooking Class' item includes the following information:

- Number Sold:** 10
- Basic Details:**
  - NAME:** Gourmet Cooking Class
  - DESCRIPTION:** Discover your culinary passion with our Gourmet Cooking Class! This engaging experience is perfect for food lovers of all skill levels who want to elevate their cooking abilities while supporting a noble cause. Each class is designed to provide hands-on instruction from professional chefs, who will guide you through preparing exquisite dishes using fresh, locally-sourced ingredients.
- Purchase Levels:**

Quantity Purchased	Price Per Item
1 - 1	\$75.00
2 - 3	\$67.50
4+	\$62.50
- Quantity & Price:**
  - NUMBER AVAILABLE:** Unlimited
  - BULK PRICES:** Not Provided
  - VALUE:** \$50
  - APPLY SALES TAX:** Not Provided
- Purchase Availability:** Always Available for Purchase
- Ticket Settings:**
  - REQUIRE TICKET FOR PURCHASE:** Not Provided
  - TICKET ADD-ON:** Not Provided

# Email Templates

Can we send more messages via email when we can't or don't want to send a text message?

- Unpaid Items template
- Item Pickup template

Message Content

Email Template \*  
Unpaid Items

← → Paragraph B I U

Hey {{ .Recipient.FirstName }},

Thank you for attending our event! Let's review payment information on file:

p

For tips on using the HTML editor, please [click here](#)

Internal Note

When should we send out this message \*

Now

Send a Test [▶ Send Email](#)

Message Content

Email Template \*  
Pick Up Items

← → Paragraph B I U Ix ...

Hey {{ .Recipient.FirstName }},

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

p 21 words 

For tips on using the HTML editor, please [click here](#)

Internal Note

When should we send out this message \*

Now

Send a Test [▶ Send Email](#)

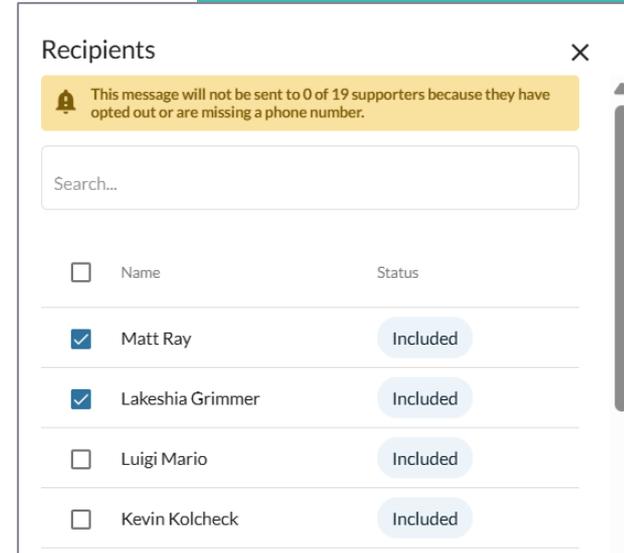
NEW

# Exclude Recipients

NEW

Can we have an easier way to exclude recipients from text messages?

- Exclude one or more specific recipients from a particular text message
- Does not impact general “opt in” status or ability to receive future messages

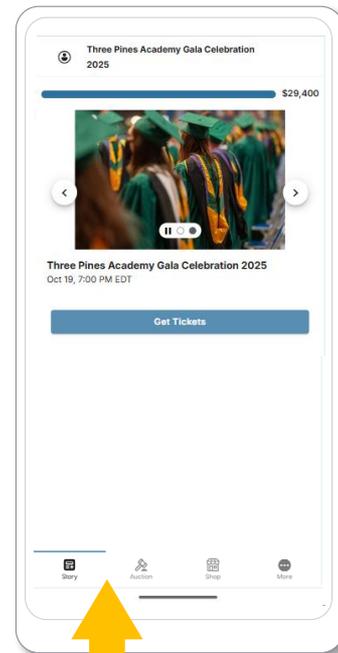
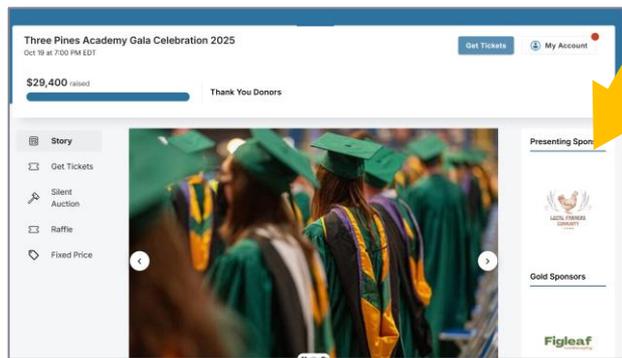
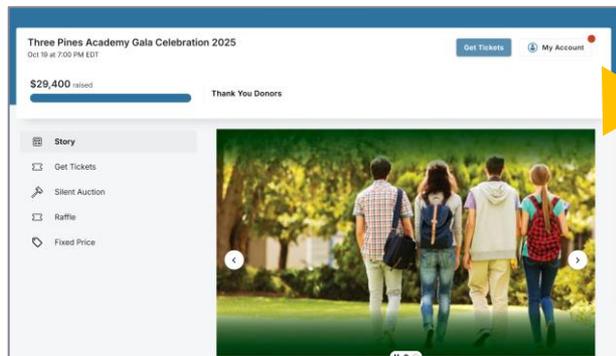


# Donation Widget

NEW

I don't want donations turned ON for my simple ticketed event or online raffle ...

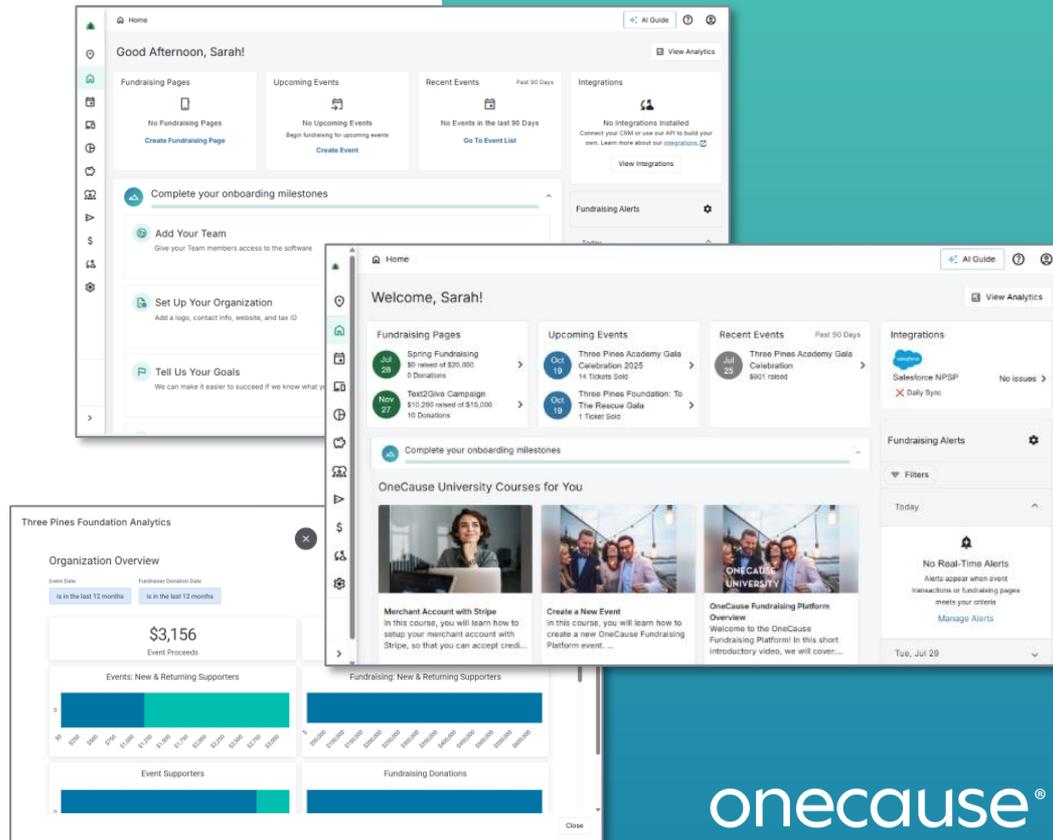
- Donation Widget is now optional
- Flexible Options
  - Remove right column
  - Remove Donations in right column
  - Remove Donations in mobile menu



# Organization Homepage

NEW

- Welcome to your new “Home”
- Fundraising Pages and Events summaries are prioritized (at top)
- Integration and Fundraising Alerts more prominently displayed (at right)
- Access to OneCause University and recommended courses
- Dashboard now under Analytics
- No changes to national organization dashboards



# RAISE MORE. EVERY TIME.

- Online Giving Sites
- Personal Fundraising Pages
- Point of Sale
- OneCause Tap™
- OneCause Payments™
- DAFpay by Chariot®
- Custom Reporting
- Comparison Report
- AI-Driven Fundraising
- Integrations

LEARN MORE  
TO RAISE MORE ►



# RAISE MORE. EVERY TIME.

Q + A

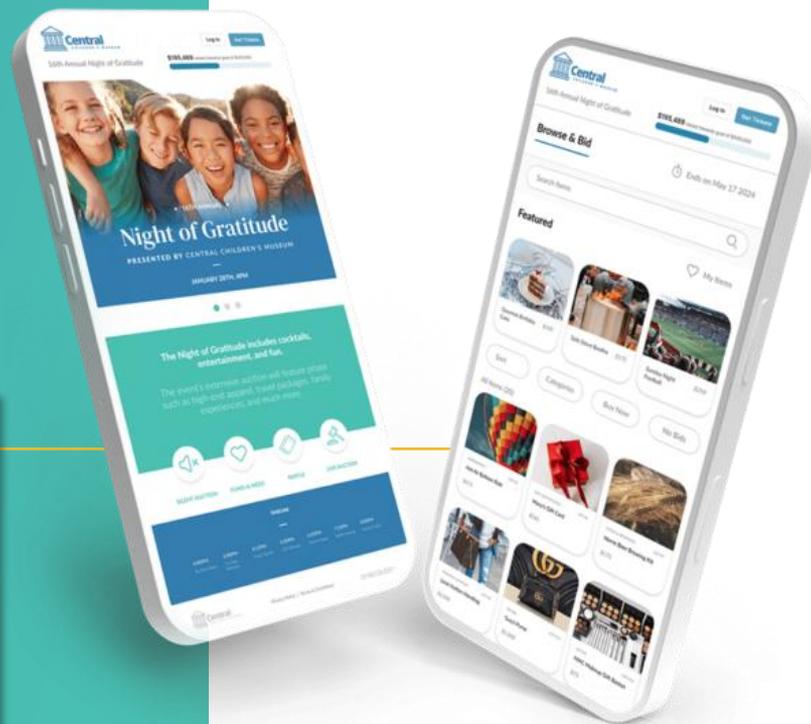


LEARN MORE  
TO RAISE MORE ►



# Thank you!

Fundraising Software  
to Raise and Reach More



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