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a Bonterra™ company

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)!

onecause® WEBINAR

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 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

ON DEMAND AT
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®

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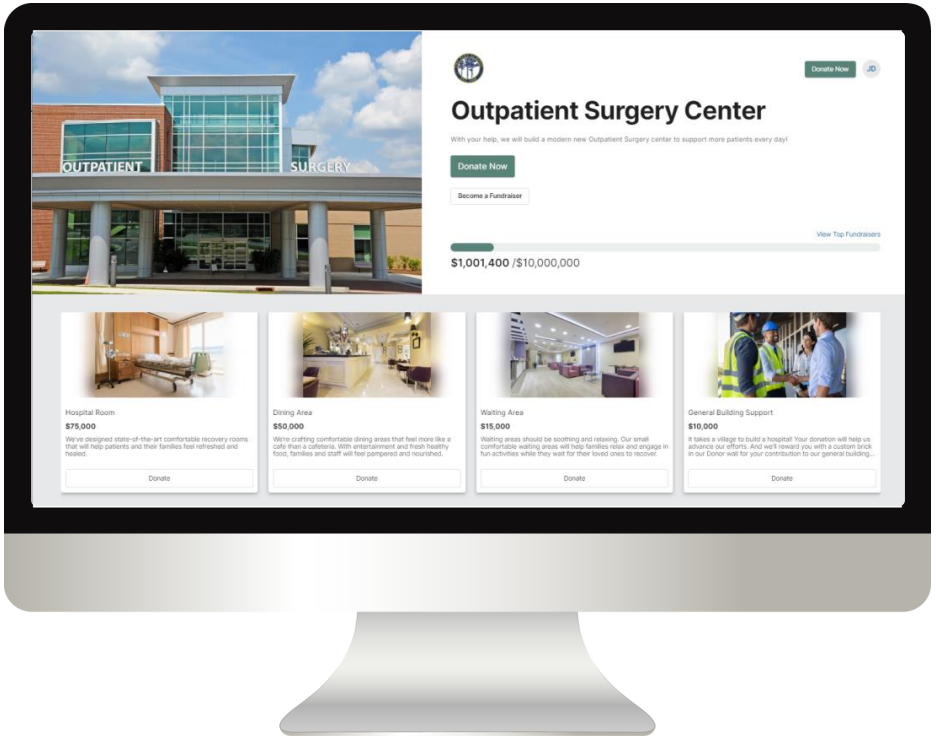
Online Fundraising & Text2Give®

- Donation Forms
- Online Giving Sites
  - Configurable branding
  - Impact levels

  Other great options for all:
  - Honorariums & memorials
  - Matching Gifts
  - Connect to event giving & interactive slide



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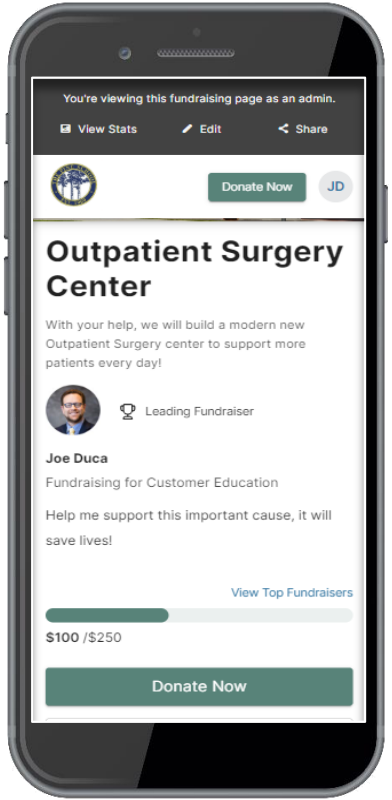
Online Fundraising & Text2Give®

- 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



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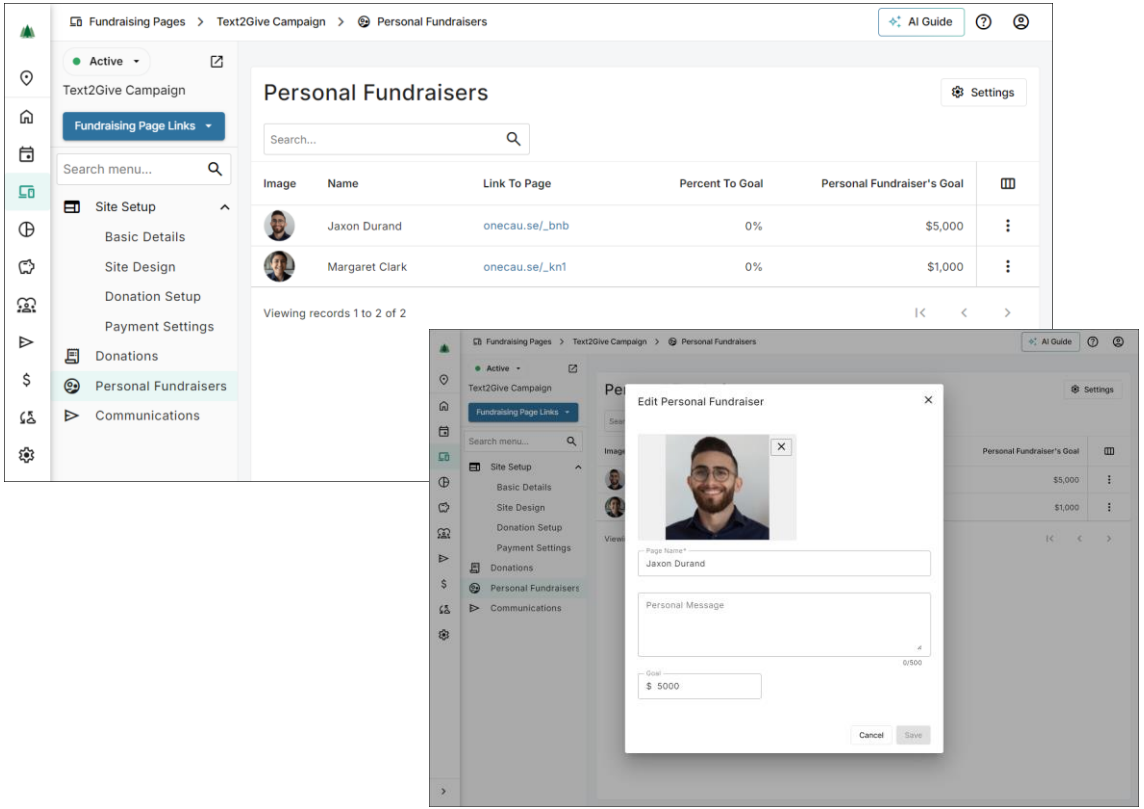
Personal Fundraisers List

NEW

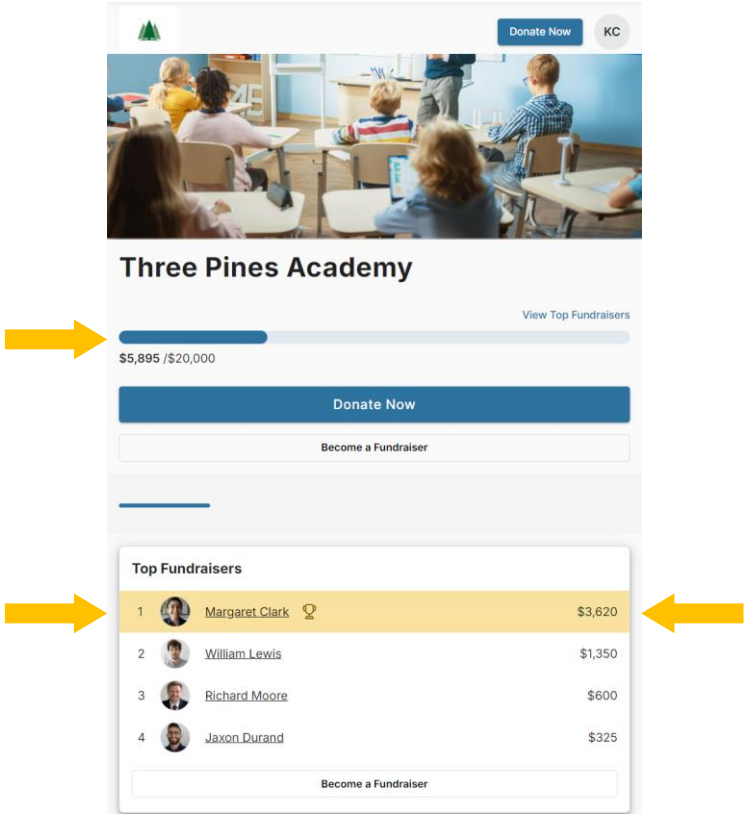
- View all supporters who have volunteered to fundraise on your behalf
- Edit personal fundraiser information, including image, name, message, and goal



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



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Integrations

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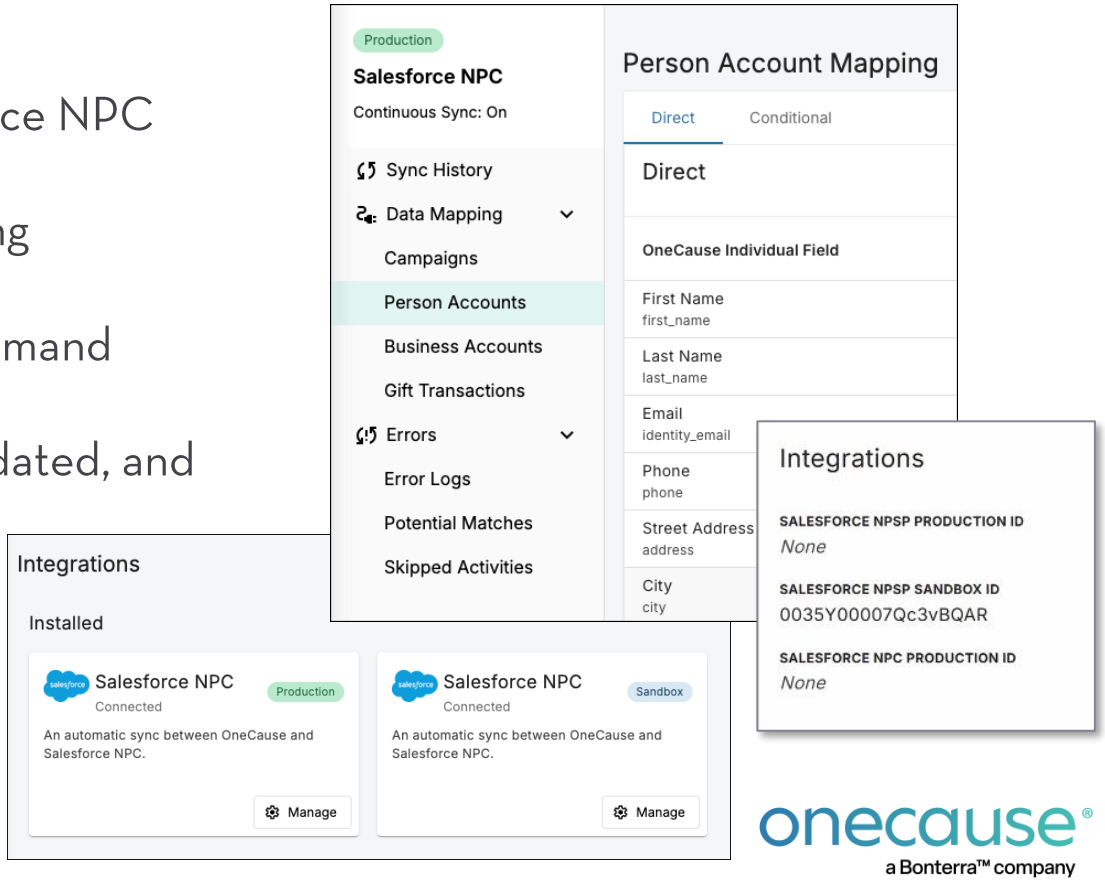
Salesforce Nonprofit Cloud

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



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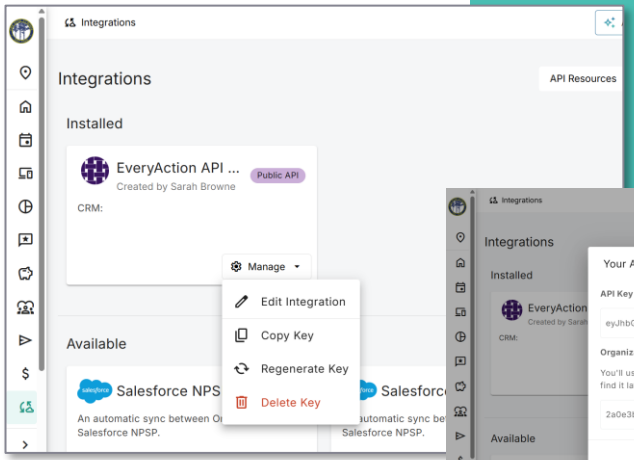
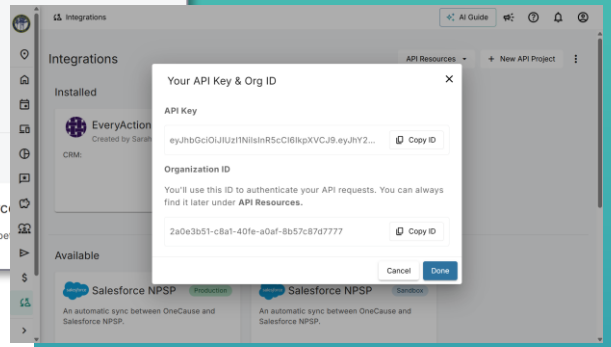
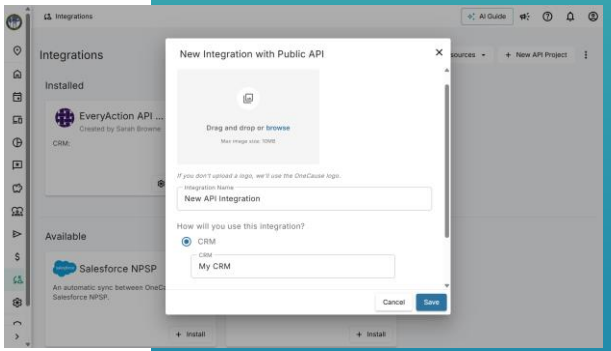
Public API

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







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Reports

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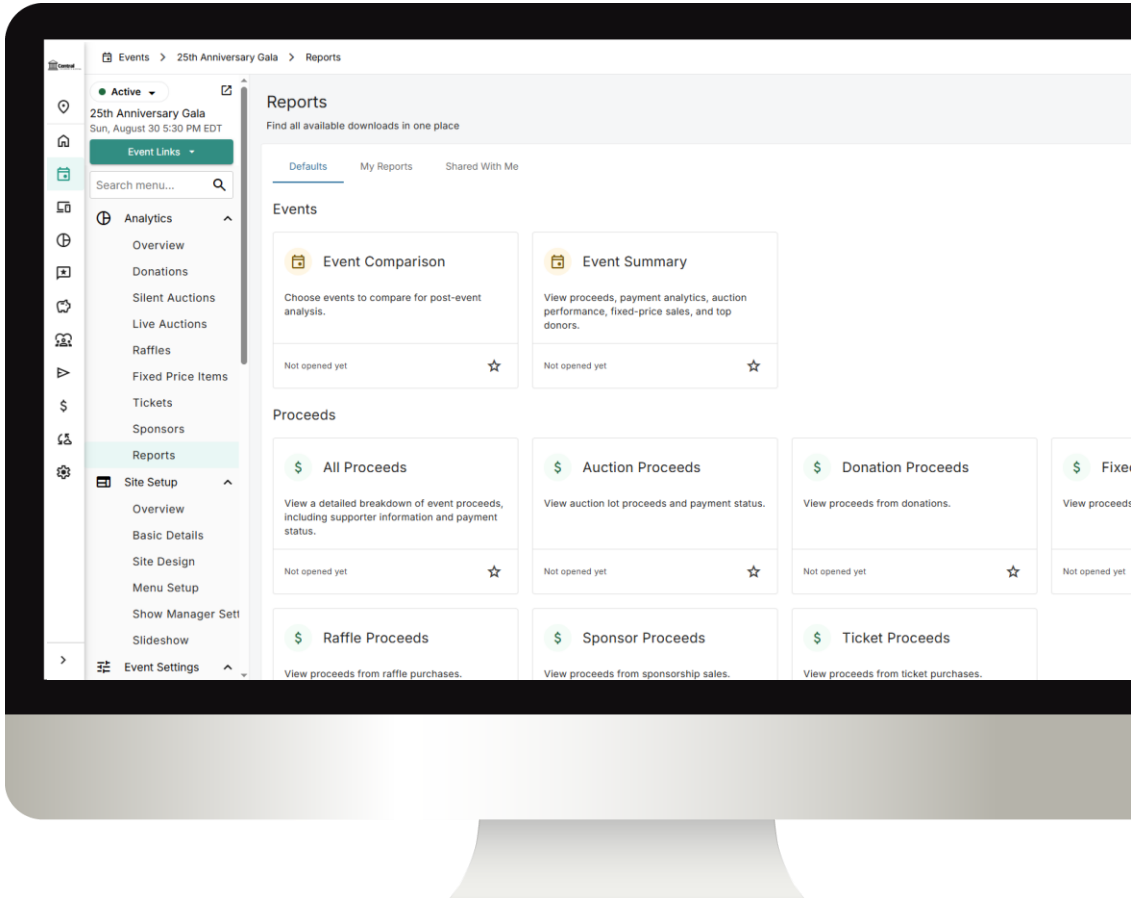
Reports Library

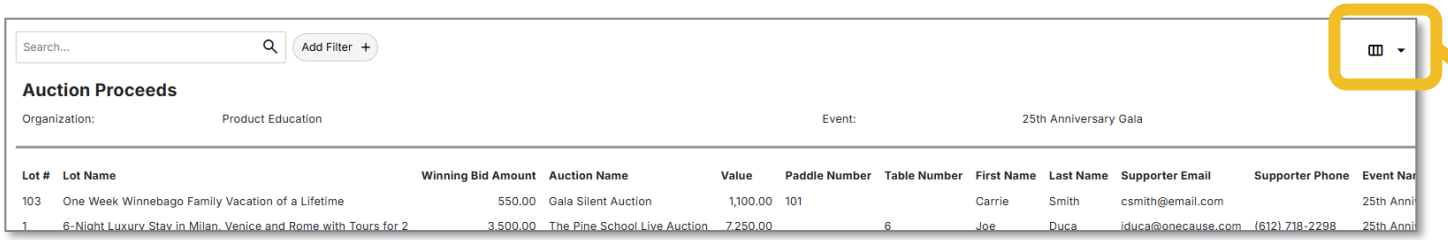
NEW

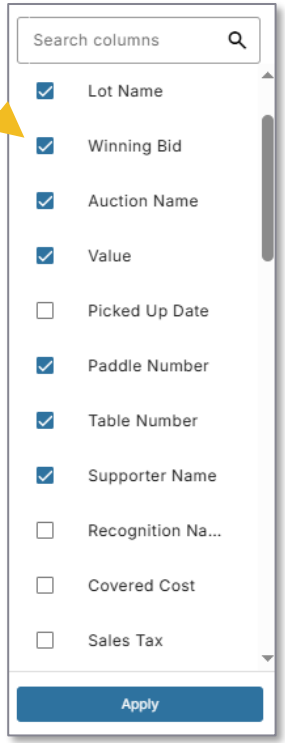
- Houses 20 of the most common fundraising reports
- Save and share configured reports with your staff
- Save favorite reports for easy access



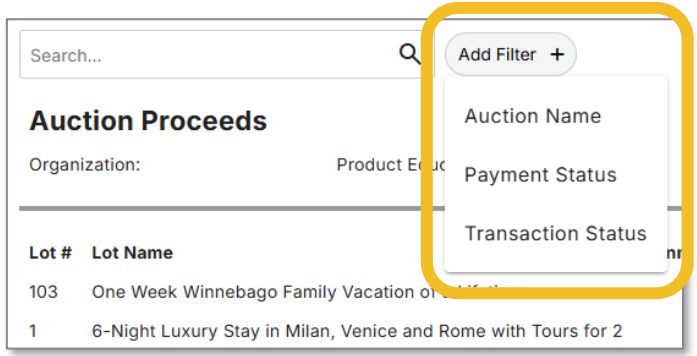
Configure Reports

NEW





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



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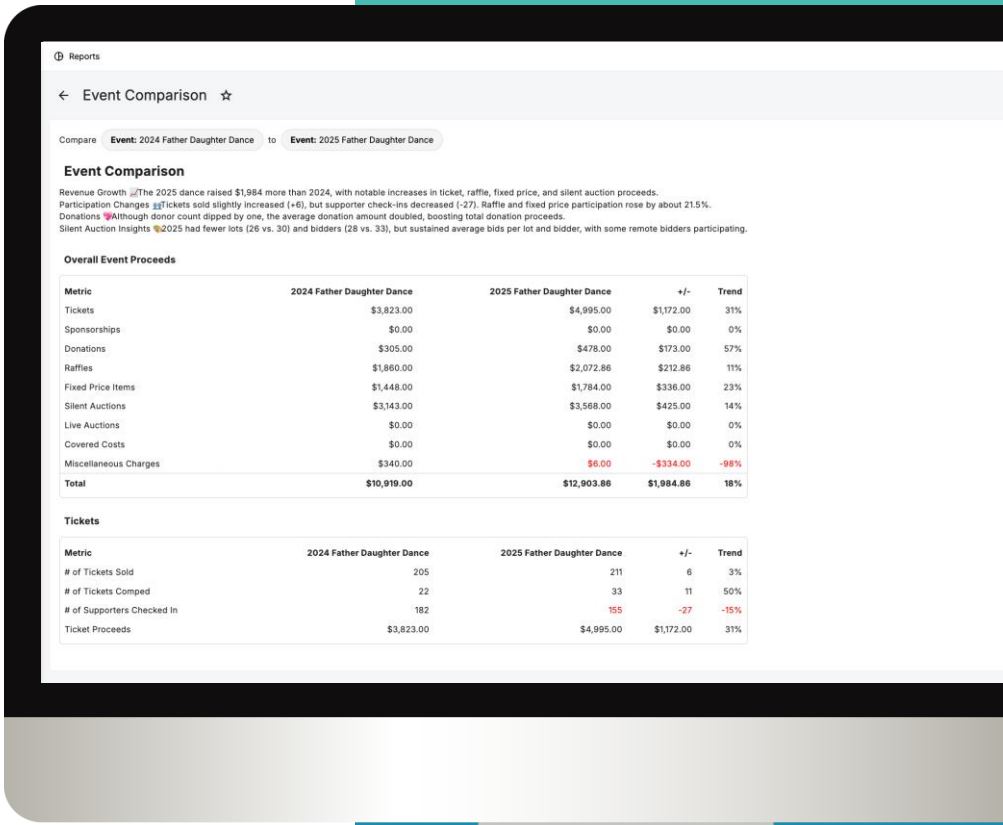
Comparison Report

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



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AI-Driven Fundraising

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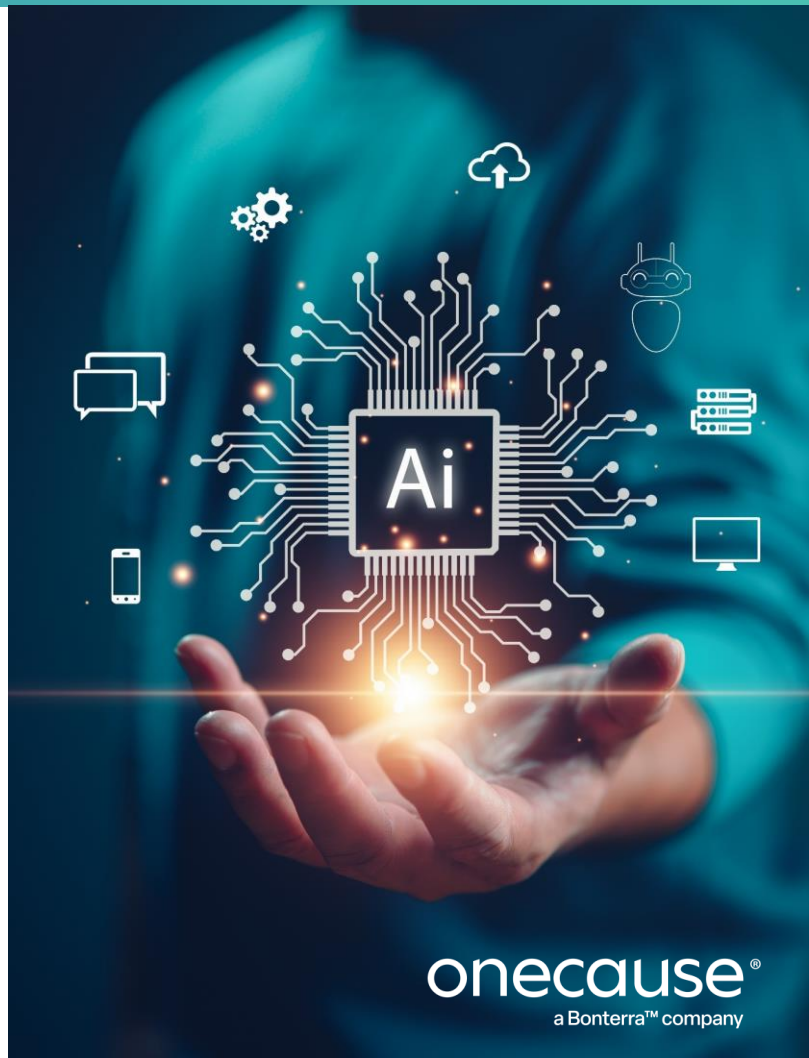
Why it matters

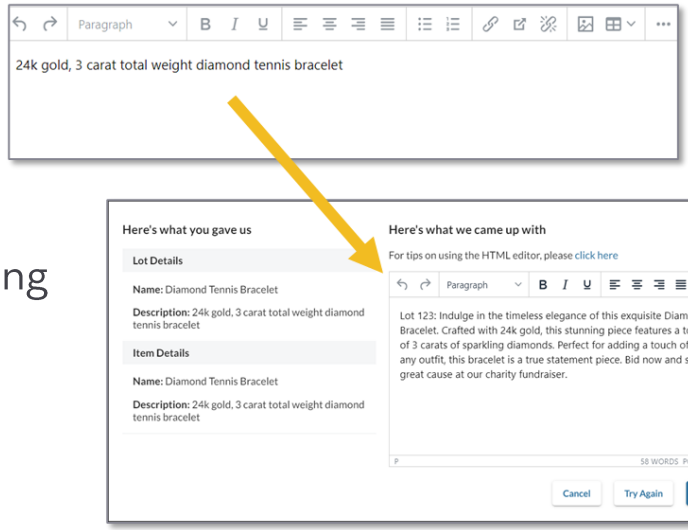
- **Generative AI** can save you hours of time, with better results.
- **Conversational AI** can make it faster to get support and answers when you need it.
- **Predictive and Analytic AI** can make data work better for you.



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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OneCause AI™ :: Easier Fundraising

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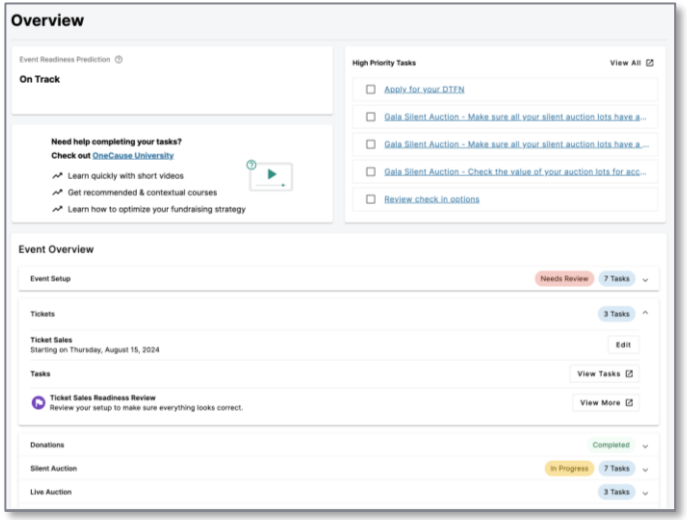
- **Description Generators** automatically craft compelling, marketing-ready descriptions, saving up to eight hours of auction planning time.

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



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OneCause AI™ :: Easier Fundraising

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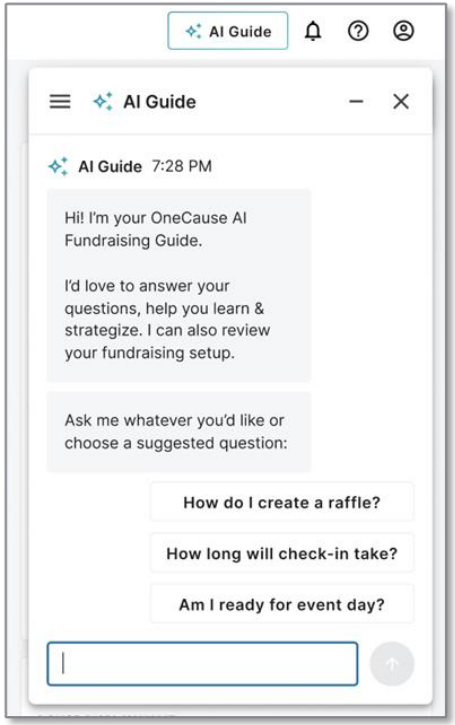
- **Description Generators** automatically craft compelling, marketing-ready descriptions, saving up to eight hours of auction planning time.
- **Event Readiness** automatically creates an overview and real-time updates of critical tasks, helping you to ensure every detail is covered.
- **AI Guide™**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



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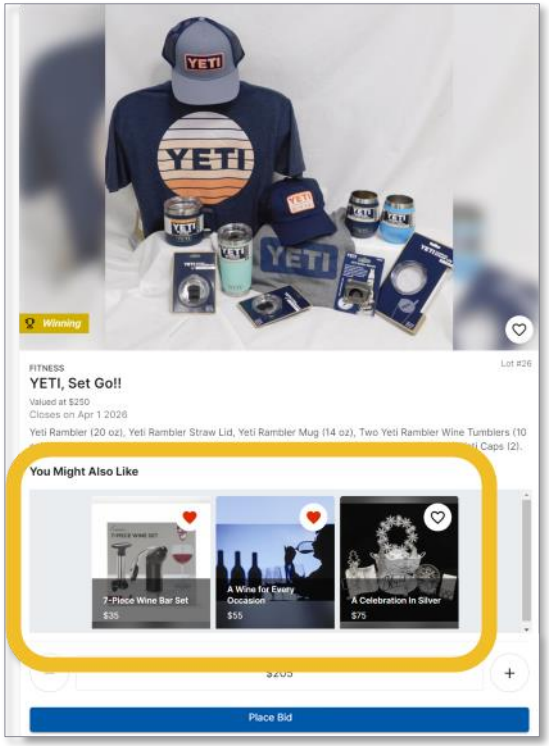
OneCause AI™ :: Increasing Revenue

No coding, no programming. It just works.

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



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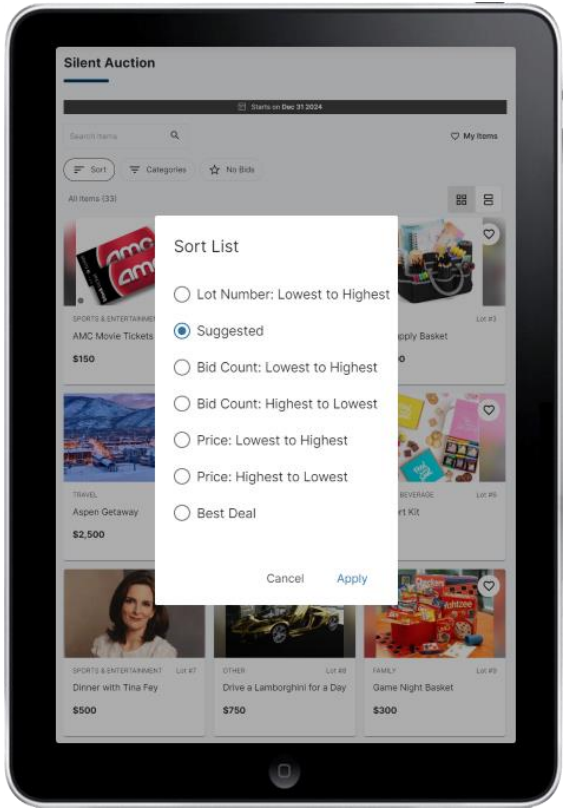
OneCause AI™ :: Increasing Revenue

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.



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OneCause AI™ :: Increasing Revenue

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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.

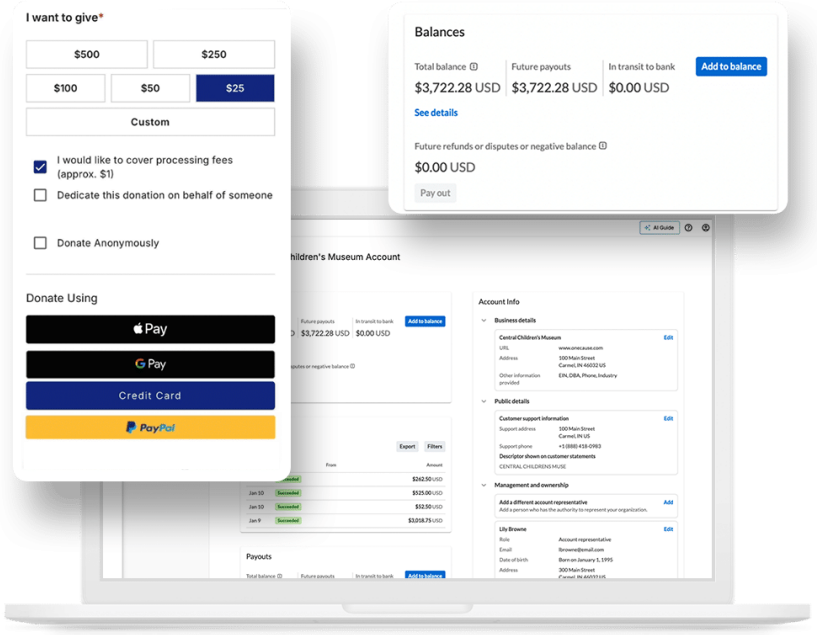
TO YOU & YOUR ORG

- 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)



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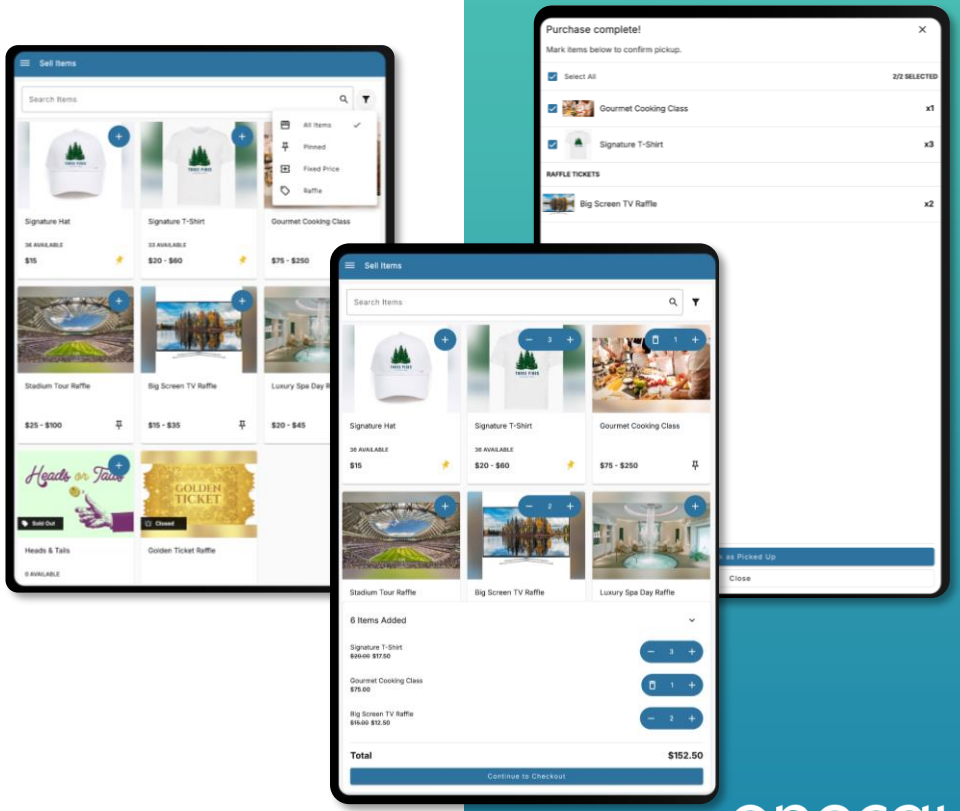
Point of Sale (POS)

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



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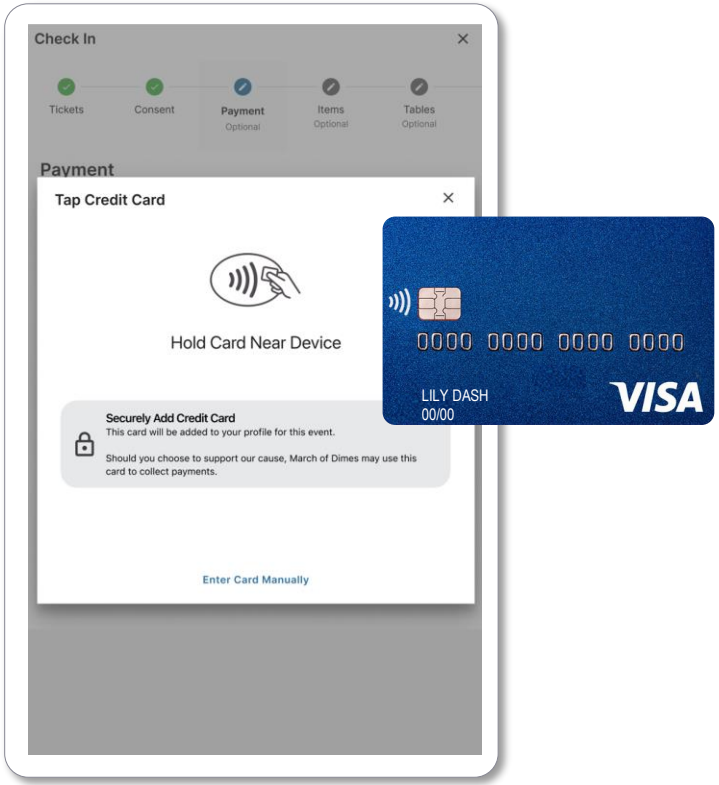
OneCause Tap™

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*

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DAFpay

by Chariot

Mitch Stein

SPECIAL GUEST

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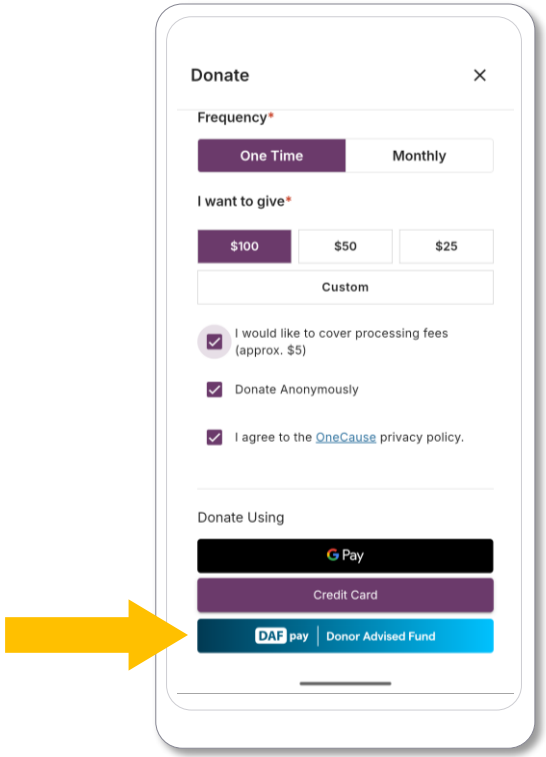
Donor-Advised Funds (DAFs)

NEW

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



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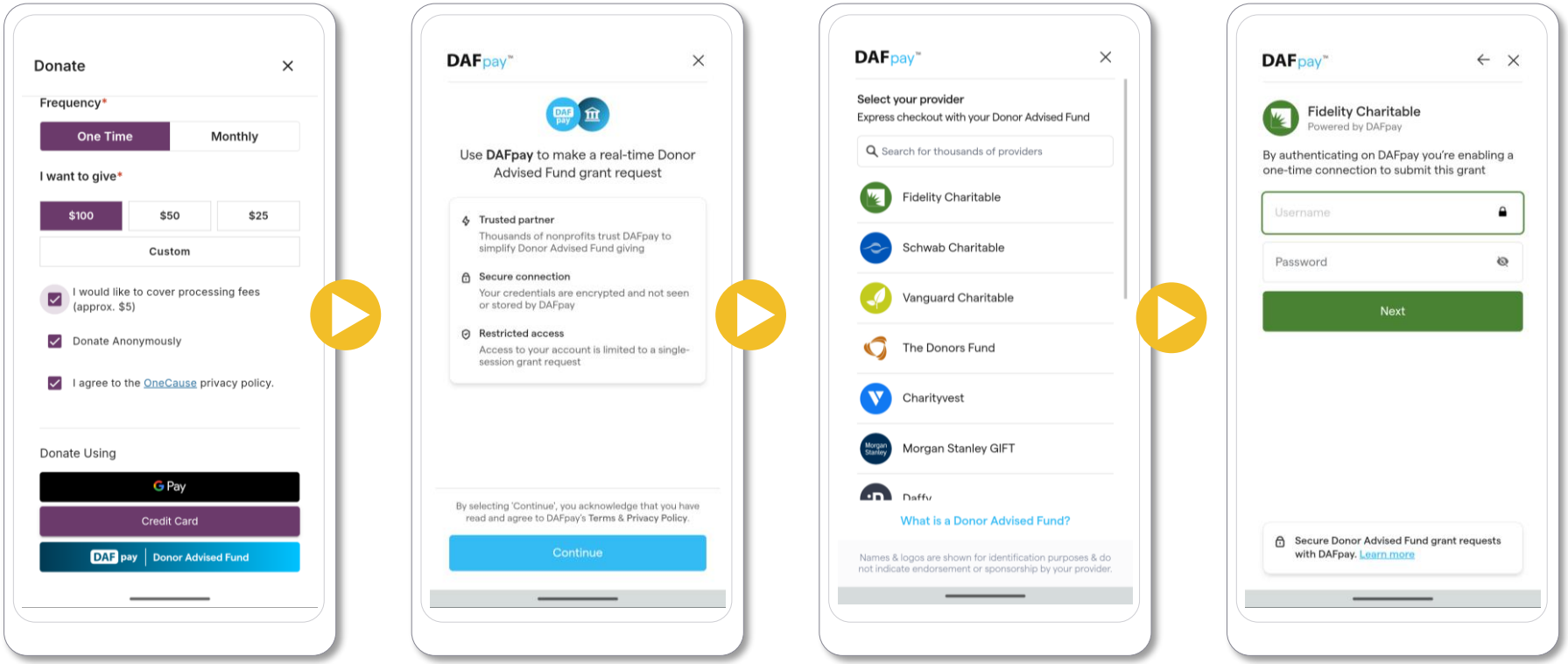
Seamless Experience

NEW



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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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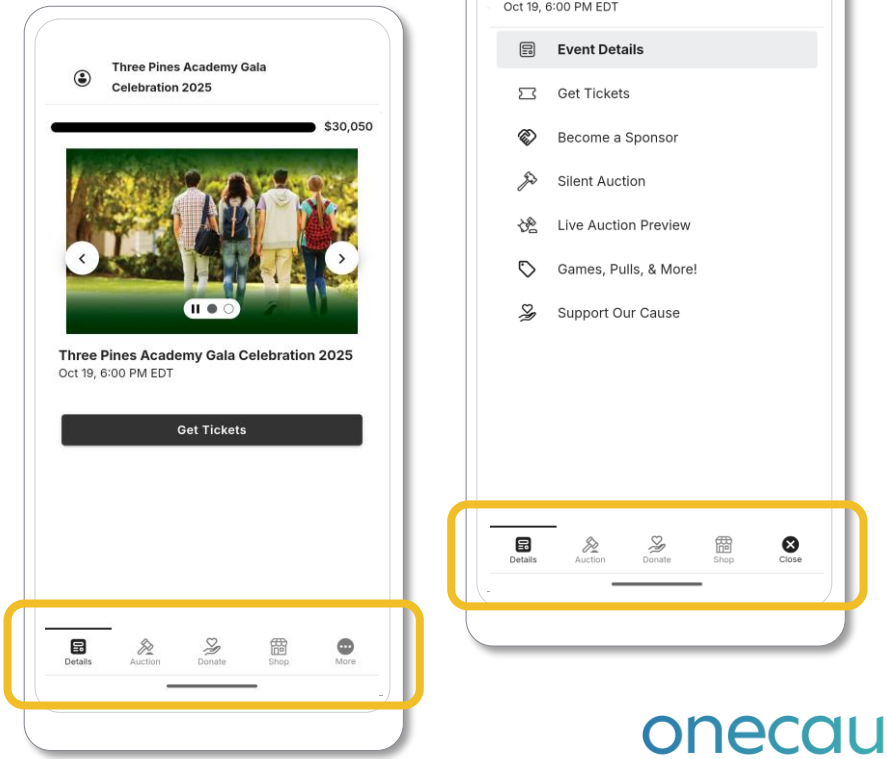
Smart Menu (Mobile)

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!



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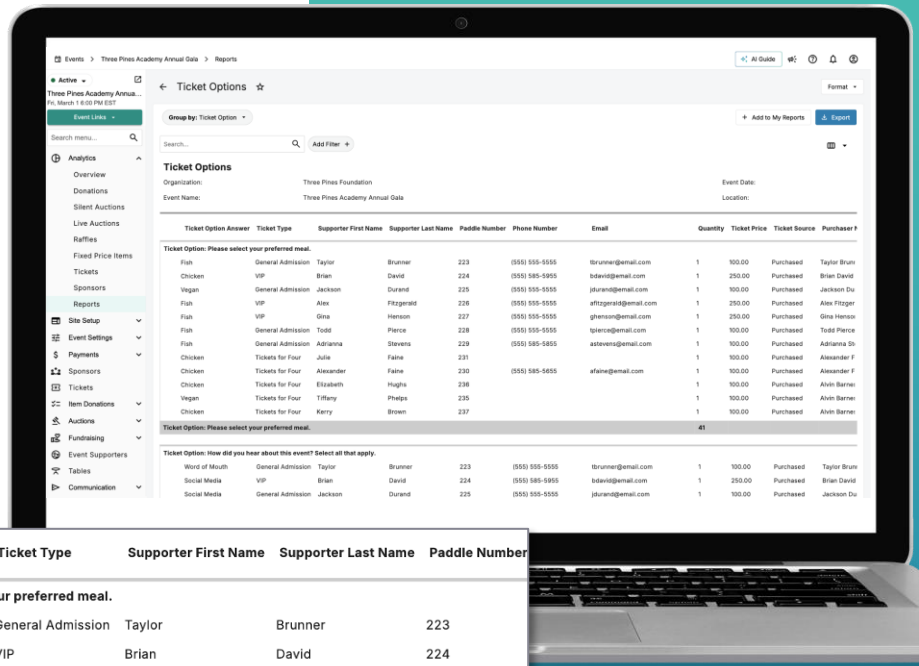
Ticket Options Report

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
Ticket Option: Please select your preferred meal.				
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

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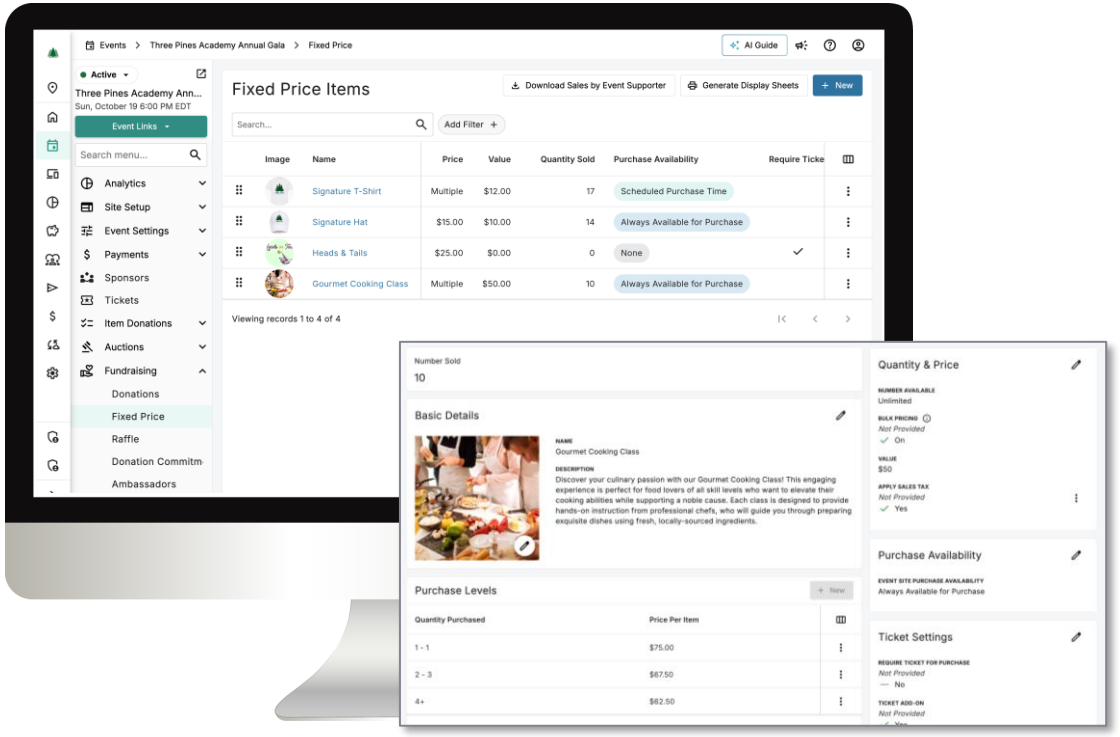
Admin Interface

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)



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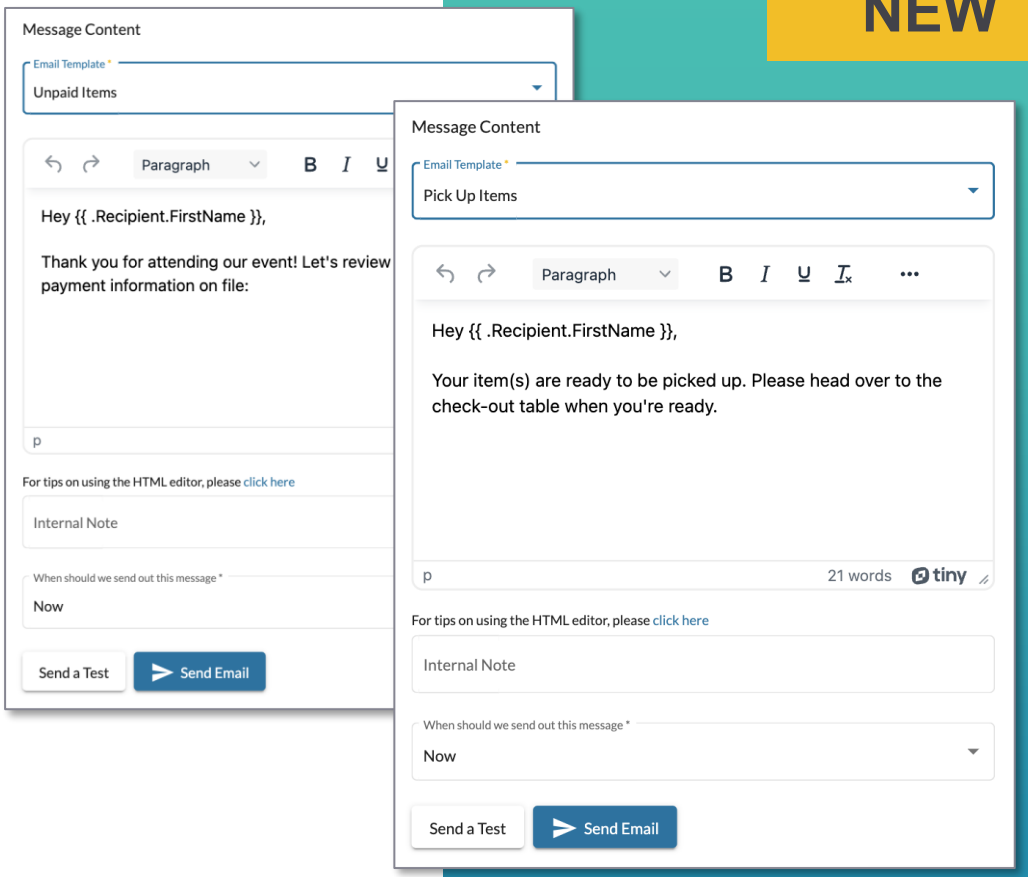
Email Templates

NEW

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



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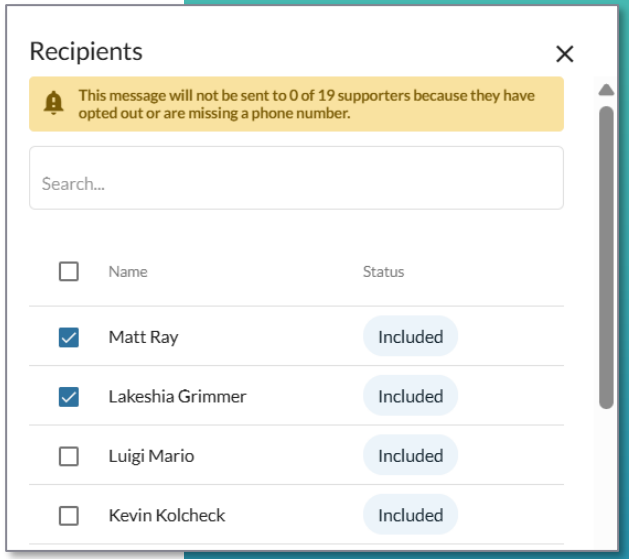
Exclude Recipients

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



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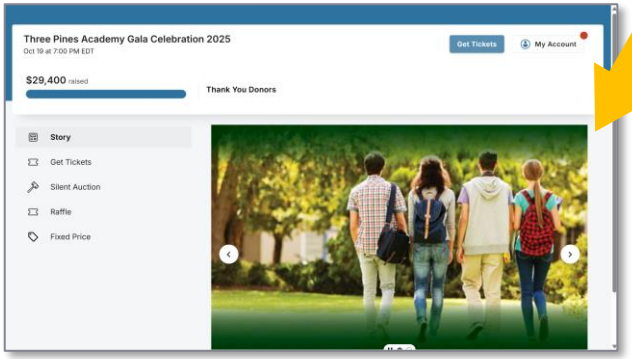
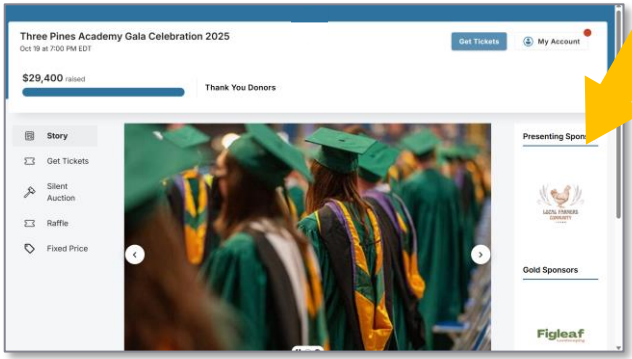
Donation Widget

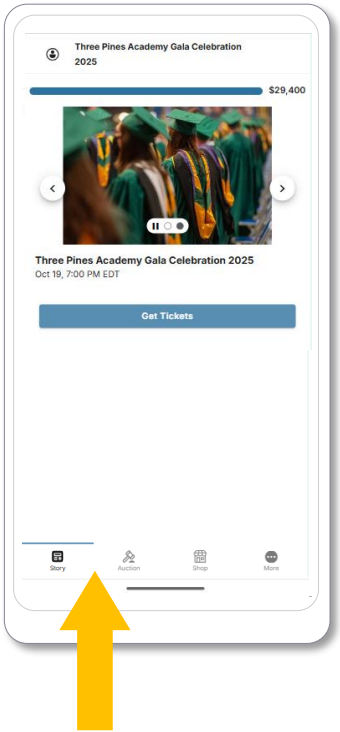
NEW

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







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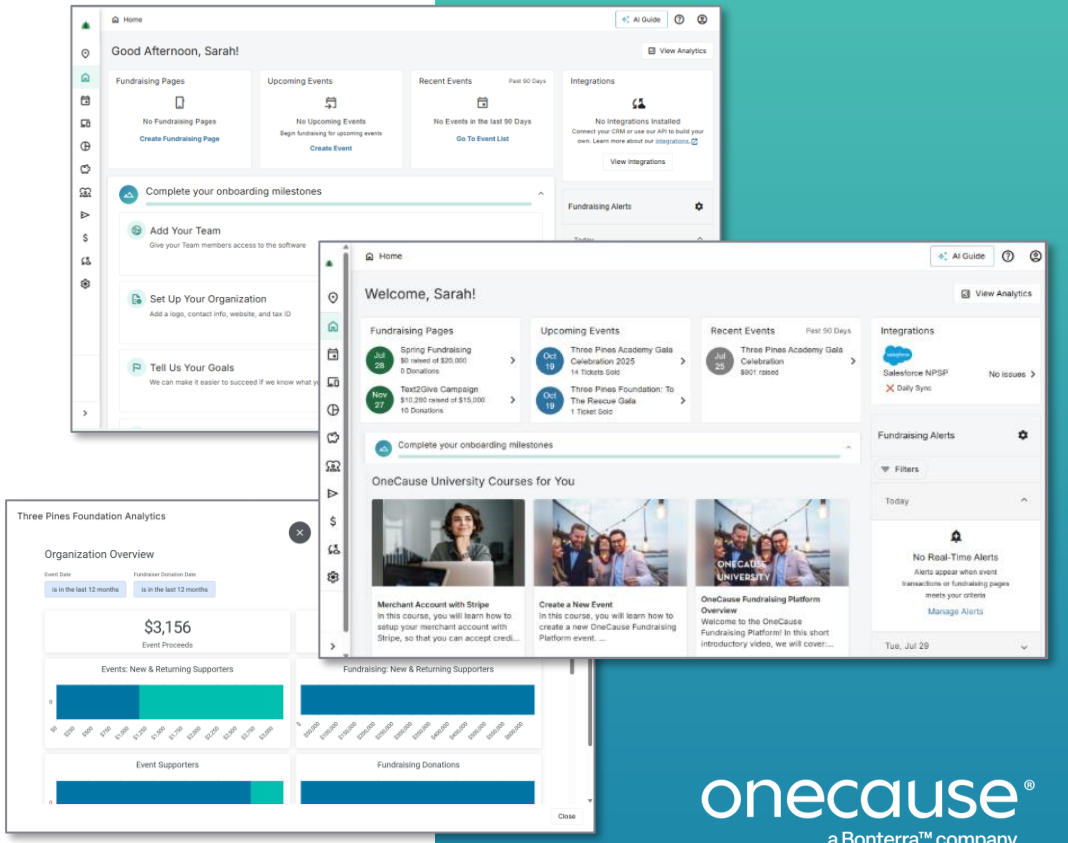
Organization Homepage

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



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

hello@onecause.com | onecause.com