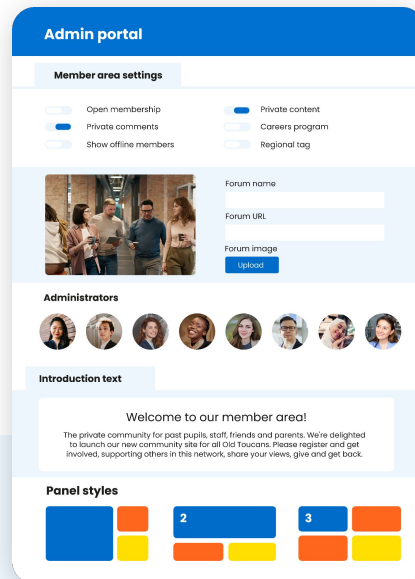
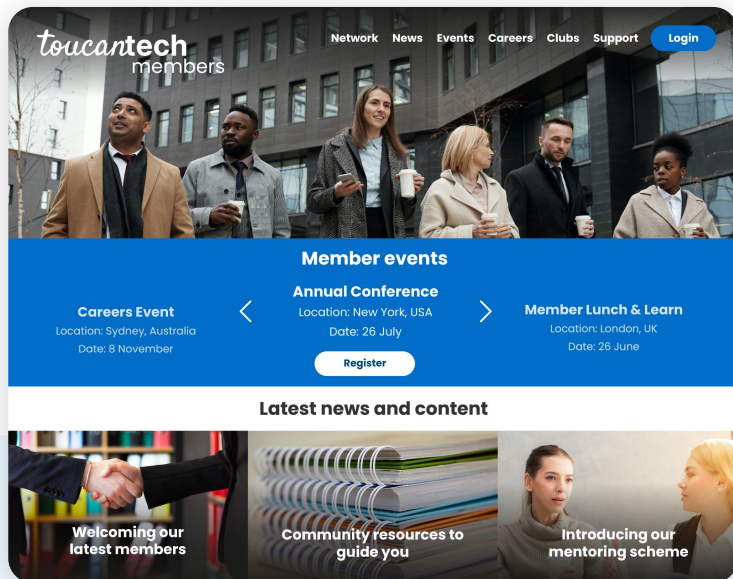


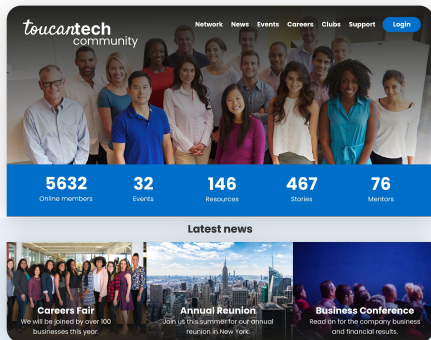
# ToucanTech: Core Features



## Confidentiality

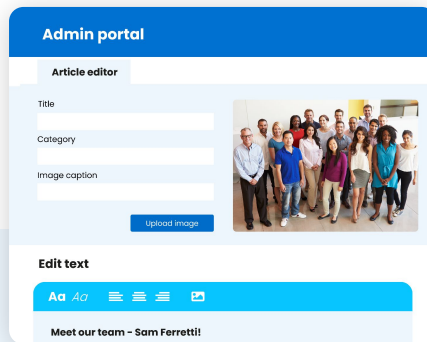
This document and its content is intended for the recipients only

# ToucanTech is an all-in-one system



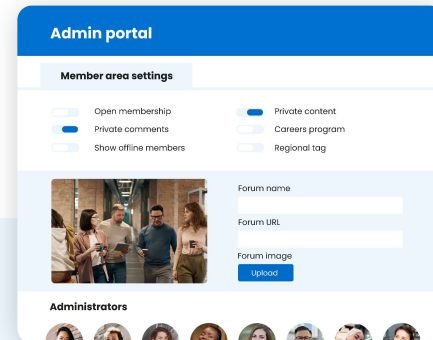
## Website & Online Community

Run a flexible and stunning website with an inbuilt online community for members to login to a private world of networking, forums and directories. No need for external web developers/designers - make changes in minutes!



## Events, Email, News, Jobs

Publish varied content and manage activities end-to-end, including email newsletters, automatic notifications, webinars, conferences, jobs boards, online payments, forms/ surveys and more!



## Membership CRM

Track all of your membership records (corporate and individual) in a secure database with powerful search filters, reporting, membership types, renewal reminders and access controls



# A comprehensive feature list ...

## Data

- Custom fields & pick-lists
- User groups & dynamic filters
- Custom admin permission levels
- Import / export data
- Organisation/ individual records
- Relationships (family, staff etc)
- Linked data across database
- Record matching & merging
- Data cleaning filters
- Complex search queries
- Mass record updates
- Reporting (on-screen edits, export)
- Admin activity log/ time-stamps
- 3rd-party integrations - e.g. Stripe

## Community

- Private networking portal
- Parent class groups
- Integrated social media
- Invite friends
- Private messaging
- Online profiles
- Control privacy/notifications
- Share photos, stories
- News feed
- Clubs/ groups pages
- Discussion forum
- Post comments
- Multimedia content
- Online payments

## Content & Comms

- News, Photos, Resources
- Video embed/link
- Forms/surveys
- Shop (e.g. uniform/ venue hire)
- Email newsletters
- External email sync
- Letter templates, postal groups
- Activity tracker
- Personalised newsletters
- Birthday messages
- Consent preferences
- Virtual reunions
- Club notifications
- System emails



# ... with new functionality every month

## Events

- Event pages with sign up
- Attendees can see each other
- Custom registration questions
- Invitations and online ticketing
- Guest bookings and wait lists
- Seating plans
- Virtual open days/ reunions
- Name badges and mobile 'check-in'
- Speakers (tagged in event)
- Attendee lists (on-screen/ export)
- Email filters (e.g. chase payments)
- Consent /donate at registration
- Event thank yous/news/photos

## Careers and Employment

- Mentoring system
- Featured mentors
- Custom mentor categories
- Custom industry pick-lists
- Jobs/ internship board
- User job posts
- Business profiles
- Industry groups
- Forum
- Careers news & resources
- Careers events
- Member search directory
- Destination/ careers surveys

## Fundraising

- Donor pipeline
- Fund management
- Fund summaries (exportable)
- Supporter engagement
- Payment processing
- Regular/one-off/major gifts log
- Legacies management
- Financial reporting
- Batch payment reconciliation
- Tax relief management
- Stewardship & next steps
- Linked donors
- Donations tagged to activities



# Streamline your membership admin


Run your membership processes and store your member records efficiently in a joined-up system

- Set up multiple membership types (by duration, price etc) and create different membership sign-up forms
- Restrict access to your full website, or certain content, based on membership type
- Create organisation (corporate) and individual records, link records and tag 'main contacts' at each organisation
- Set up auto-renewals and discount codes
- Switch on system emails - e.g. when someone's membership is close to expiry, has been cancelled etc
- Create payment forms (for website or email) to take card payments via Stripe/ PayPal or direct debit via GoCardless
- Show an editable 'My Membership' area for logged-in members to review/edit details and cancel membership

## Admin portal

### Member area settings

<input type="checkbox"/> Open membership	<input checked="" type="checkbox"/> Private content
<input checked="" type="checkbox"/> Private comments	<input type="checkbox"/> Careers program
<input type="checkbox"/> Show offline members	<input type="checkbox"/> Regional tag




Forum name

Forum URL

Forum image

### Administrators






### Introduction text

Welcome to our member area!

The private community for past pupils, staff, friends and parents. We're delighted to launch our new community site for all Old Toucans. Please register and get involved, supporting others in this network, share your views, give and get back.

### Panel styles

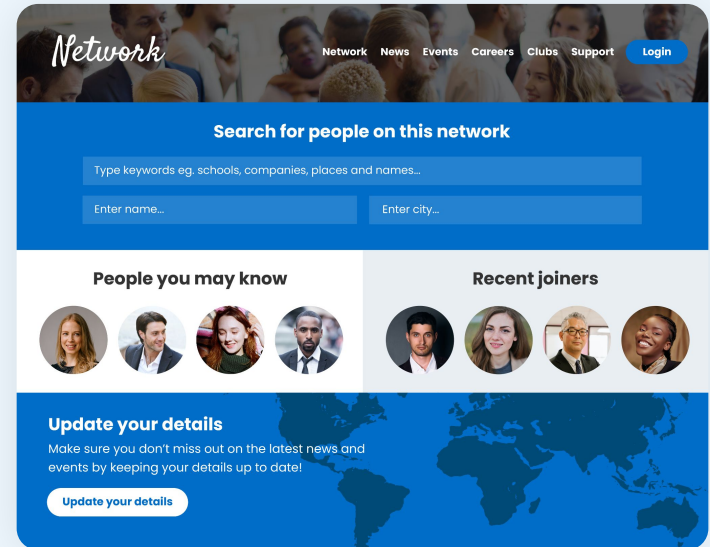
		
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# Grow and engage your community

Connect with members wherever they are in the world. A ToucanTech community website drives deeper engagement, more often.

- Join with social media accounts (such as facebook or LinkedIn) or a custom sign-up form
- Offer a private network for members to share stories, join discussions, run groups, invite friends
- Capture data every time someone logs in, views content, downloads resources, fills out a form, signs up to an event etc
- Manage emails, news, surveys, events and eCommerce



# Business & members profiles

Create organisation profiles to view in the online community separate to individual member profiles

- Profile pages for members are customisable with different sections to capture and share details important for your community.
- Individual members can edit their profile information at any time including for privacy, consent options.
- All Profiles can be found in the public domain.
- Content ie articles can be 'tagged' to member profiles.
- Employee profiles can be linked to their organisation's profiles page. Both the organisations main administrator and the site admin can update employees attached to organisations.

The screenshot displays the profile page for the American Dream Fund on the toucantech platform. The page features a blue header with the toucantech logo and navigation links. The main content area includes the organization's logo, name, location, and website. Below this, a section titled 'American Dream Fund's current employees' lists five team members with their photos and roles.

**toucantech**  
Show site

Home Forum Support Us Events Clubs Network Content Careers Shop Business Directory

**AMERICAN DREAM FUND**  
ADF

**American Dream Fund**

Currently: Washington D.C., United States of America  
Website: [www.adreamfund.com](http://www.adreamfund.com)

American Dream Fund's current employees

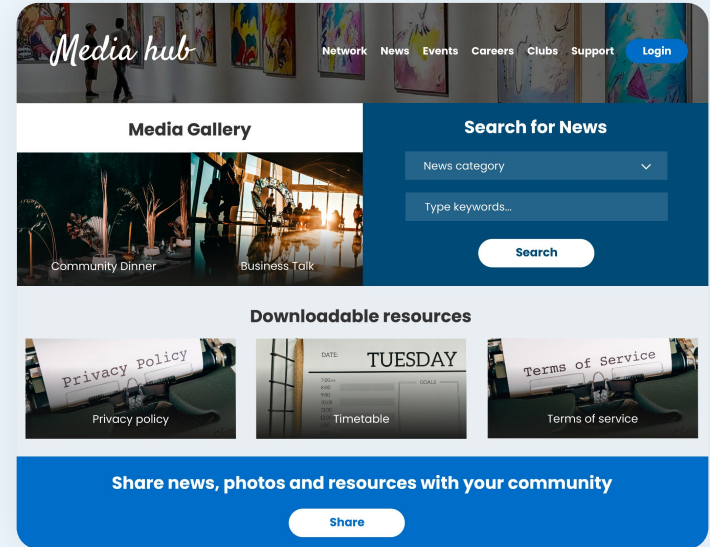
 <b>Amy De Costa</b> Toucantech Head of Accounts	 <b>Daniel Walk</b>	 <b>Esquiel Breen (Ortiz)</b>	 <b>Georgia McMillan</b> Toucantech Business Development Representative	 <b>Sian Rosetta-Stone</b> Branches India GRADUATE BRANCH OPENING PROGRAMME
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# Create a home for your content

Publish news, photos, forms, resources, events and campaigns on a beautiful website for your community to access everything in one place.

- Enjoy an easy-to-use and flexible content management system
- Edit site design, create new page layouts and update branding in minutes - no coding needed!
- Publish news, photos, forms, resources, events and campaigns with categories and tagging
- Choose URL endings and set SEO tags for news stories and custom pages
- Display content publicly, restrict behind login or tailor for specific user groups



# Manage online and in-person events

Promote and plan your events using the efficient start-to-finish system in ToucanTech.

- Set up stunning event pages, online ticketing, guest bookings, wait-lists and seating plans
- Coordinate virtual reunions, online meet-ups, conferences or gala dinners  
Manage invitations, registration forms, payment options, ticket types, speakers, attendee lists, name badges and thank you follow-ups
- Report on events, filter lists and export information
- Switch on advanced events features such as add-on payments (e.g. merchandise sales and travel packages), seating plans, QR ticket codes and a calendar view of all upcoming events

The screenshot shows the 'Events' page on the ToucanTech website. The header includes navigation links for Network, News, Events, Careers, Clubs, Support, and a Login button. The main content area features a blue banner for the event 'Careers talk with Joe Hull'. To the left of the banner is a photo of a speaker on a stage. To the right, event details are listed: location (New York, USA), date (Friday 26 July), time (13:00-15:00), and 100 attendees. Below the banner, there is an 'Event description' section and a 'Location: New York, USA' section with a map of New York City.

**Events** Network News Events Careers Clubs Support Login

**Careers talk with Joe Hull**

New York, USA

Friday 26 July

13:00-15:00

100 attending

**Event description**

You'll be able to participate in engaging activities, interact with industry professionals, hear from our Careers Consultants and learn what knowledge, attributes, skills and experiences you want to develop to build success in your career journey.

We look forward to seeing you there!

**Location: New York, USA**

A map of New York City with a blue location pin in the Manhattan area, indicating the event location.



# Power your communications

Send and track relevant and regular emails, letters and updates to keep your community engaged.

- Segment your audience lists and save filters
- Create stylish newsletters, event invites, birthday messages and personalised postal letters with drag & drop content
- Manage consent preferences and easily clean database for bounced emails and duplicates
- Track engagement directly in database records and monitor most/ least engaged
- Run postal mail merges, create household postal groups and store copies of all correspondence in your database records

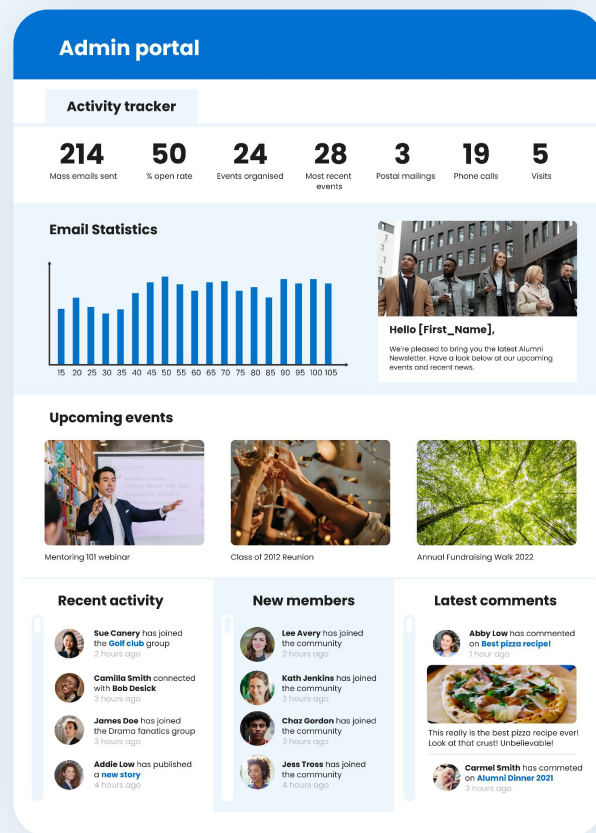
The screenshot displays the 'Admin portal' interface. At the top is a blue header with the text 'Admin portal'. Below this is a section titled 'Email Editor' which contains a drag-and-drop interface for creating emails. It features a main preview area with a header image, a personalized greeting 'Hello [First\_Name],', and three content blocks: 'Alumni of the Year Award', 'Join our next webinar', and another 'Join our next webinar' block. To the right of the preview are several blue icons for editing text, code, images, lists, and links. Below the editor is a 'Recipients' section showing a list of names: Samuel Jackson, Jessica Jones, Fran Webster, and Chloe Frank, each with a small profile picture. At the bottom is an 'Add Events' section with three images showing various social events and gatherings.



# Track all of your activity centrally

Log all interactions with your community in one place, making it easier to understand what's working and what to focus on.

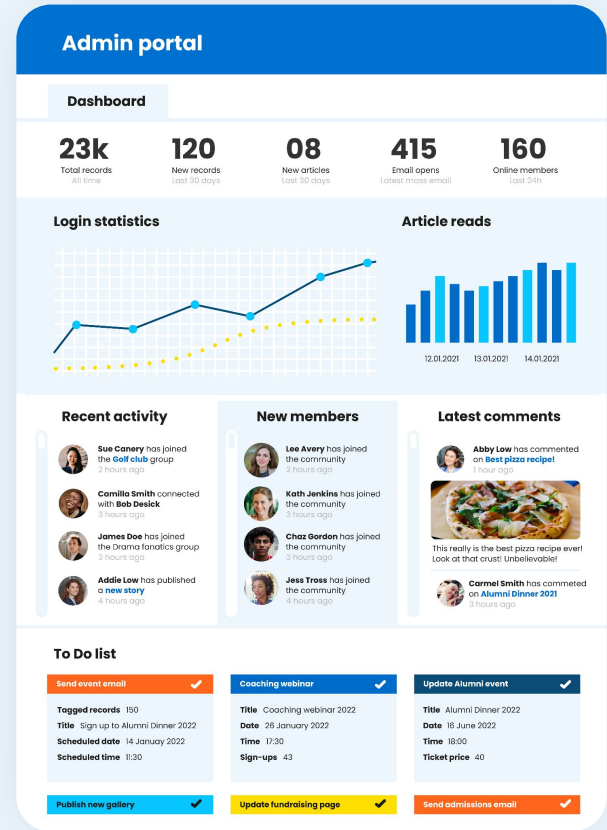
- Automatically track email opens, unsubscribes, event sign-ups, connections, downloads and more
- Allocate tasks to specific admins
- Log phone calls and meetings
- View an audit trail of changes by administrators
- Sync external email discussions into CRM



# Take control of your data

Access your database records in one user-friendly, secure system to save precious admin time.

- Customise fields, pick-lists, registration questions and permission levels
- Import, link, merge and clean records
- Output data via CSV and Open API
- Run (and save) sophisticated search queries, mass updates, and reports
- Segment database on multiple criteria (e.g. demographics and engagement filters)
- Track all communications and activities
- Manage consent preferences



# Set up granular admin controls

With a range of permission options, restrict admin access to the parts of the database they need

- Create your own admin levels and assign individuals to these groups
- Control admin levels by entire section (e.g. access to Events) or dive deeper to restrict access to particular types of Notes or Records or Fields, with granular read/write/ edit controls
- Track when admins login, what changes they make to the database and if they've exported any data
- Set up 2-factor-authentication if required and adjust the time-out settings for administrators
- Log 'to do' actions in the CRM assigned to specific admins
- Support admins with training from ToucanTech, an embedded 'knowledge base' with your admin portal and access to an international customer support community

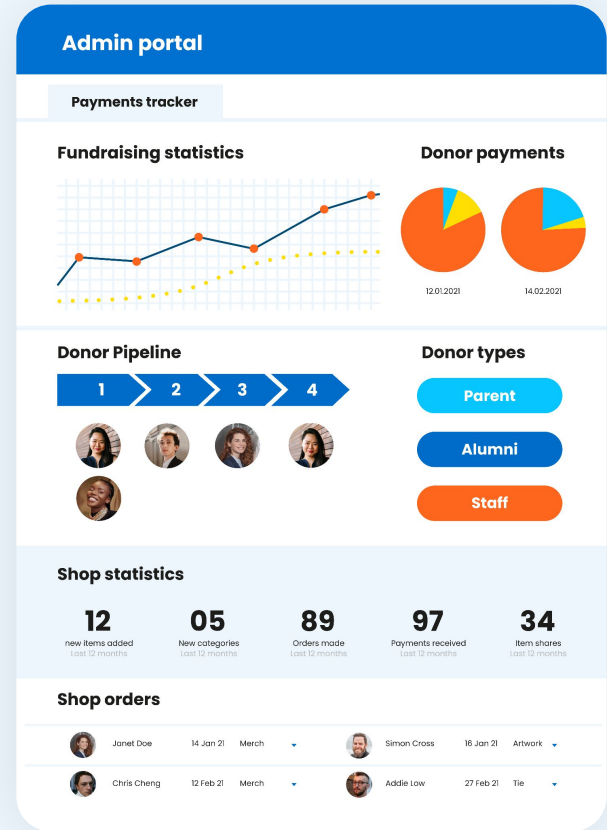
Super Admin	Full Admin	Database admin	Read-only	Content Creator
⚙️	⚙️	⚙️	⚙️	⚙️
✓	✓	✓	✓	✗
All User Groups	All User Groups	All User Groups	All User Groups	All User Groups
✓	✓	✓	✓	✗
✓	✓	✓	✗	✗
✓	✓	✓	✗	✗
✓	✓	✓	✗	✓



# Run impactful fundraising campaigns

Manage flexible fundraising campaigns with online donations, giving pages, emails and donor analytics

- Create beautiful fundraising pages for different campaigns, with embedded online donations, targets, progress tracker etc
- Choose from different payment processors (Stripe/ PayPal/ GoCardless/ Apple Pay) for one-off/ recurring donations
- Enable public, or community-only, donations
- Publish a dynamic list of donor acknowledgements
- Track all donation stats and analyse donor data
- Manage a 'pipeline' of major donors, tracking key conversations, next steps and pledge amounts
- Send personalised thank you emails/ postal letters



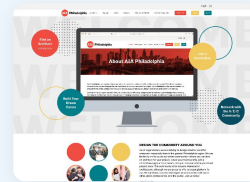
# Client examples



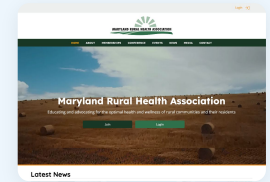
Women In Bio



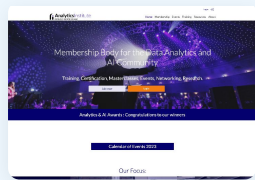
Washington State Association of Counties



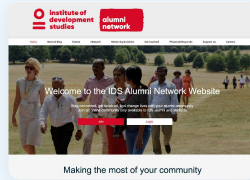
American Institute of Architects



Maryland Rural Health Association



Analytics Institute



Institute of Development Studies



The Francis Crick Institute



Shell Pensioners' Association



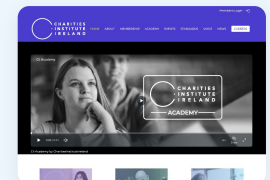
EcoCAR



Shatterproof



John Boner Neighborhood Centers



Charities Institute Ireland



# Highest software review ratings

## ***A user-friendly and comprehensive solution backed by exceptional customer service***

*ToucanTech meets all our software needs for fundraising, networking and community engagement programs. It is incredibly intuitive and pretty much everything just works as it should right from the outset. The support team are extremely responsive and are also proactive in offering help and suggestions. We have barely needed any assistance from our IT team. Useful new functionality is constantly being added, and I'd like to see us expand use further.*

**Paul, Director of Development, Australia**

## ***So happy we made the switch to Toucan Tech!***

*We are finding the ToucanTech team an absolute joy to deal with. They know their stuff and are incredibly responsive and customer-focused. Our data migration was managed expertly. I couldn't be happier that we have made the switch.*

**Melanie, Marketing Director, UK**



## ToucanTech

by ToucanTech

★★★★★ 4.9 (104)

We are proud to have the highest software review rating online amongst our competitor set on established and verified review sites like Capterra



# Thank you!



**Simeon Chan**

Account Executive

**[Simeon@toucantech.com](mailto:Simeon@toucantech.com)**

**Tel: +1 415 413 3051**

**[Visit toucantech.com](https://www.toucantech.com)**