

*gift*tool

Web Hosted

ePhilanthropy & eCommerce Services

December 2019

GiftTool.com Inc
www.gifttool.com

Toll free: **1-877-665-8665**
Email: info@gifttool.com

1. About GiftTool

Founded in 1999, GiftTool is a trusted provider of integrated web-delivered e-commerce and e-philanthropy services, meeting the needs of non-profit organizations that want to maximize the impact of their web presence. GiftTool services work synergistically to improve your effectiveness, reach a broader audience, and increase your revenues and donations. With GiftTool, you don't start from scratch. GiftTool solutions extend the value of your existing IT investments by working with your current website and organization's processes. GiftTool online solutions are flexible and can grow with your organization, as your needs expand. GiftTool services include:

Event Registrar

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- **Handle event registration with minimal effort:** Simplify guest registration and maximize attendance while streamlining your event coordination. Allow registering guests to pay by credit card, check and/or at the door. Record check payments in the system to keep your balance due reports updated. Useful for fundraising galas, multi-day conferences, workshops, webinars and other events.

Pledge-a-thons

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- **Empower supporters to raise more money with their own personal fundraising websites.** Raise more money from your special events and campaigns involving volunteer fundraisers or team challenges. Manage the online registration and fundraising components of your event. Individuals or teams can create and maintain their own Web sites, manage email communications with friends and family regarding their event participation, and easily measure and display progress according to their fundraising goals.

Online Donations

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- **Grow your donor base effortlessly:** Give your donors a secure and reliable way to make donations while visiting your website.
- **Build donor loyalty through monthly giving:** The key to a successful long-term fundraising program is to build donor loyalty. Studies show that one of the best ways to achieve this goal is through monthly giving clubs – since monthly donors are more loyal than even your most consistent annual donors.
- **Automate to save time & money:** When an online donation is made, GiftTool automatically emails your customized thank you message. For Canadian charities able to issue tax receipts, an encrypted electronic tax receipt conforming to the latest Canada Revenue Agency standards can also be sent automatically.

Shopping Cart

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- **Boost revenues by selling your goods online:** Give your customers a secure and reliable way to purchase your products online, quickly and affordably.
- **Sell access to electronic items and streaming video:** Create a new revenue stream by selling access to your streaming video footage; your PDF reports, photos or images; and other electronic media.

Membership Management

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- **Provide high quality service to your members:** Save time and money by automating membership sign-up, verification, renewals, and reporting. Offer expanded services to your membership with a password-protected members-only area.

Online Surveys & Secure Tests

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- **Learn more about your audience needs:** Create professional online surveys to assess the needs or opinions of your audience. Or include a questionnaire as visitors register for your events online.
- **Cost-effective way to test or certify your staff, students or members:** Create secure online tests where results are tabulated instantly. Offer certification programs that require participants to pass a test. Or let your participants conduct self-exams at their own speed.

2. The GiftTool Solution

GiftTool hosted ePhilanthropy and eCommerce services are a proven solution that can provide your organization with real-time transaction processing and online automation. The benefits of GiftTool's fully configurable, hosted solution are many:

- **Maintains your branding**

With the GiftTool hosted service, your organization will benefit from a comprehensive set of integrated e-commerce services that become a transparent extension to your organization's website, providing a custom look and feel — without a custom price. GiftTool will format all template pages to identically match your website with all navigation links.

- **Easy to customize and administer**

With a secure password, your organization can easily customize your online pages and confirmation emails using the GiftTool Wizards. When satisfied with the look and functionality, launching the application is a straightforward process – simply add the links to your website.

When requirements change in the future, your organization can easily modify the text, add new events, products or memberships, etc. With a click of the button, changes will be instantly reflected when saved.

From your account, you will also be able to search for member or event registrant profiles -- viewing past transactions, updating contact information, and recording check payments to keep balance due reporting updated.

You can also manage your monthly donors and your eStore order fulfillment.

- **Robust, proven system that benefits from continuous upgrades**

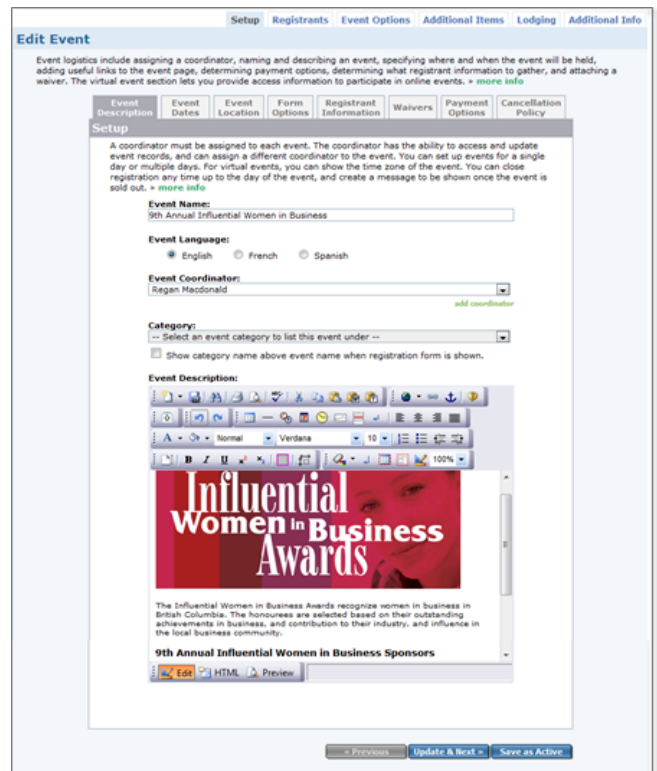
Since 1999, GiftTool has been providing online eCommerce services to a large variety of business and non-profit clients with a robust, proven hosted software system. From the onset, the GiftTool system has been built to handle an extremely high level of transaction volumes and concurrent users.

Additionally, all GiftTool clients benefit from constant service upgrades and new features based on the requests of our many clients. Although GiftTool does not develop custom solutions, the company often integrates special requests from clients free of charge, if the upgrade is of benefit to other clients.

- **Low overall lifecycle costs**

As a hosted solution geared to non-profits, GiftTool structures its pricing for all our services with low upfront & maintenance costs, and variable fees that are discounted as your volume grows (speak to us for details). There are no extra hidden costs for training, support or maintenance. And given the integrated modular approach of GiftTool, ensuring scalability and the ability to add new functionality is a simple process.

Your organization does not need to sign on for all services at once; instead you can expand your use of GiftTool services as your needs grow. Furthermore, your organization is not locked into a lengthy contract period – our user agreement is a simple arrangement allowing you to cancel any service(s) with 1-month's notice. For more information, please view our Terms of Use at: https://www.gifttool.com/terms_of_use.



- **Secure, reliable online credit card processing in CA\$, US\$, Euros, GBP, AU\$, and HK\$.**

Enterprise-strength security is a critical component of GiftTool's business in order to protect the customers' credit card transactions & confidential information. GiftTool employs the latest encryption technology meeting the security standards of the Payment Card Industry (PCI DSS) -- to ensure credit card payments are secure before, during, and after every transaction. Each transaction is encoded using 128-bit encryption and includes SHA1 one-way data encryption, inbound and outbound packet filtering, and permission-based application level security.

GiftTool is able to seamlessly connect to a variety of payment gateway / Internet merchant account solutions to handle the behind-the-scenes credit card processing (in Canadian Dollars, U.S. Dollars, Euros, British Pounds, Australian Dollars, Hong Kong Dollars).

Payment Gateway / Internet Merchant Account Partners:

- [SafeSave Payments](#) (CA\$, US\$)
- [IATS](#) for Non-Profits (CA\$, US\$, GBP, EUR, AUD, HKD)

Note: GiftTool can support multiple currency accounts, using the lowest option for each transaction when a minimum value threshold is reached.

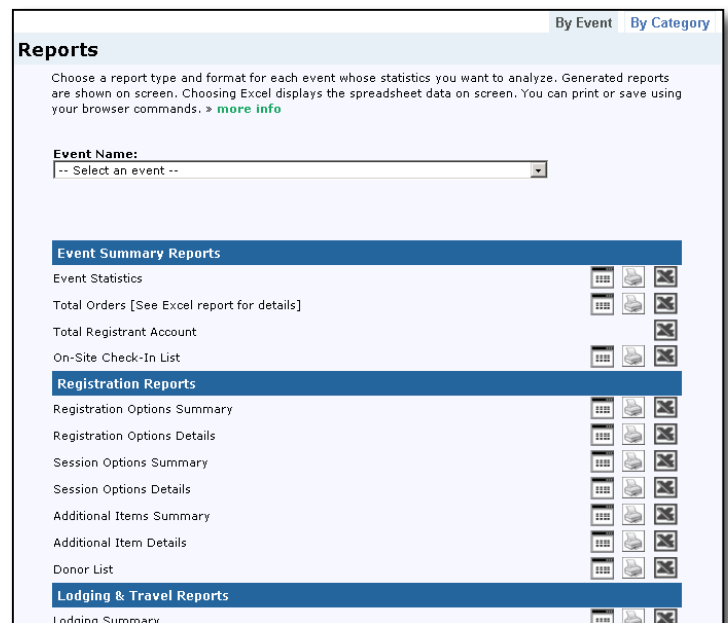
- **Comprehensive reporting capabilities**

GiftTool reporting can enhance your ability to track results and learn from past campaigns -- improving results over time. GiftTool reporting also provides a valuable audit trail of all online transactions and cancellations.

GiftTool provides a robust and user-friendly reporting system, which will enable your organization to easily view reports based on all of their online activities. The data is available for analysis at any time. You can download all data in a variety of Excel report formats for easy importation into other systems.

You will also have the ability to query the database to search for and administer:

- **Individual event registrants** (update contact details; record check payments).
- **Monthly/Quarterly donors** (determine which cards will soon expire; update contact details / credit card numbers / expiry dates).
- **Individual members** (update contact details; record check payments).



- **Setting up your GiftTool Account is easy!**

We can usually set up your account within 2-3 business days, building your templates to match your website with all your navigation links. Once your account is set up, all you have to do is log into the GiftTool Client BackOffice with your username and password to adjust your settings; create your registration forms, eStore and/or surveys; and copy the links into your website. It's all very simple.

When you are ready to proceed, just give us a call at 1-877-665-8665.

3. GiftTool Event Registrar Service

GiftTool Event Registrar service allows you to create an unlimited number of events in English, French or Spanish, listed individually in the monthly invoice for convenient tracking. With GiftTool, your organization can:

- Allow registrants to RSVP electronically 24 hours a day and pay by credit card, check and/or at the door.
- Set early or late registration pricing.
- Create various price levels for different registrant types (member, non-member, student...), or even create VIP price categories for complimentary tickets that your staff can administer separately from your online registration form.
- Create a simple ticketed event or a complicated multi-day conference with a choice of sessions.
- Prevent registrants from choosing sessions that are already fully booked.
- Sell additional items (t-shirts, parking passes, gala dinners, etc) and hotel accommodations.
- Add a donation section to the registration process.
- Include an "Add to Calendar" link in your confirmation email, which opens a calendar entry already pre-populated with all your event information.
- Include a "Get Driving Directions" link to a Google® Maps website pre-populated with your event location.
- Include a "Forward to a Friend" section to help registrants advertise your event to others.
- Optionally, have registrants accept a waiver before completing their registration form.
- Simplify onsite check-in for your staff and your guests! Approximately 1-2 weeks prior to your event, assign seating to all attendees and re-send confirmation emails with their seating assignments.
- For virtual internet events, such as "webinars", include instructions to access your live internet seminar in the confirmation email automatically sent to your registrants.
- Print badges using commercially available badges.
- Delegate the management of specific events to other staff -- giving them their own password that only gives them access to set up and manage their events.



Below are some examples of clients using GiftTool to handle their online event registration -- demonstrating GiftTool's ability to customize the look to match a client's website and online objectives:

Ticketed Events:

Hope Connections for Cancer Support: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1636&EID=27347>

The Children's Foundation: <https://www.gifttool.com/registrar/ShowEventDetails?ID=2160&EID=23210>

FIRST Washington: <https://www.gifttool.com/registrar/ShowEventDetails?ID=2255&EID=27442>

Conferences / Workshops:

Ivey Business School: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1202&EID=27576>

BCBEC: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1888&EID=27893>

Languages Canada: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1711&EID=27669>

Tours, Courses & Retreats:

Ontario Association of Social Workers: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1125&EID=27471>

Historic Yellow Springs: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1604&EID=27990>

French Pastry School: <https://www.gifttool.com/registrar/ShowEventDetails?ID=1299&EID=27980>

4. GiftTool Pledge-a-thon Service

The GiftTool Pledge-a-thon service provides easy, affordable and powerful web-based tools to help your organization raise more money from your special events and campaigns involving volunteer fundraisers or team challenges.

With the power of GiftTool, you can easily and effectively manage the online registration and fundraising components of your event in English, French or Spanish. Individuals or teams can create and maintain their own Web sites, manage email communications with friends and family regarding their event participation and easily measure and display progress according to their fundraising goals. Photographs, links, progress reports and other content options make websites a destination for volunteers' friends, family and other supporters. Participants also can use their websites to manage secure, simple online and offline donations.

Easy-to-use tools for your volunteer fundraisers

Let your strongest supporters easily tap into their personal networks to raise more money and mobilize other volunteers with a convenient, effective way to solicit donations from friends and family over the internet.

- Personal websites for volunteer fundraisers, which they can personalize with their photo, inspirational message and a graphic display of their fundraising achievement to date.
- Team and group fundraising websites.
- Email communication capabilities to mobilize friends & family.
- Easy online donation processing and opportunities for monthly giving.
- Recording of offline pledges received.
- Reports and graphs for measuring progress.

Automate the process for easier management

- Website templates customized to match your website.
- Integrated online registration for your events — for individuals, teams, and corporate groups consisting of multiple teams.
- Email communication capabilities to mobilize and manage your volunteers quickly and effectively.
- Extensive real-time reporting that helps you understand and manage the results of your fundraisers.
- Automatically handle online donation processing, monthly donations, and all confirmation emails.

Below are some examples of clients using GiftTool to handle their online volunteer fundraising events – demonstrating GiftTool's ability to customize the look to match a client's website and online objectives:

Take a Hike Foundation: <https://www.gifttool.com/athon/AthonDetails?AID=4030&ID=1951>

Toronto Polar Bear Club: <https://www.gifttool.com/athon/AthonDetails?ID=2240&AID=4023>

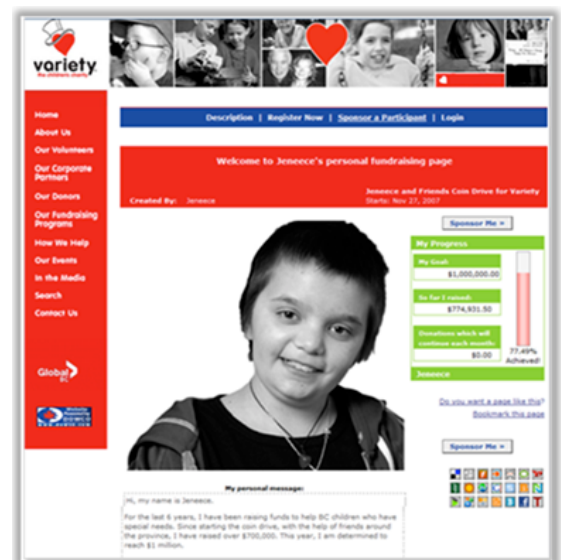
The Isaac Foundation: <https://www.gifttool.com/athon/AthonDetails?ID=2012&AID=3912>

Team Broken Earth: <https://www.gifttool.com/athon/AthonDetails?ID=2250&AID=3656>

Pacific Rowing Club: <https://www.gifttool.com/athon/AthonDetails?AID=4040&ID=2170>

Supports your ...

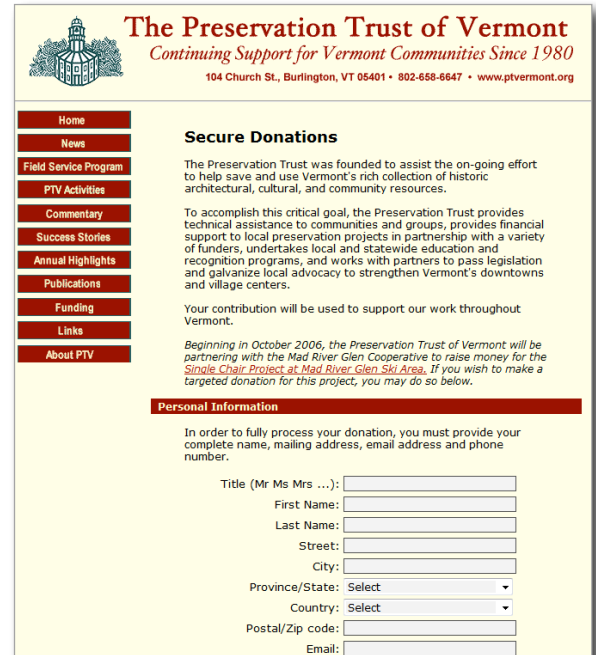
- **Pledge-based fundraising events**
Walk-a-thons, Bike-a-thons, 10 k runs, Golf-a-thons, Surf-a-thons, ... and much more!
- **Team & corporate challenges**
Corporate fundraising events, book clubs, dinner party clubs, ... whatever you can imagine!
- **'Virtual' fundraising drives**
Awareness raising campaigns, political campaigns, radio campaigns, and more!
- **Permanent feature on your website**
asking volunteers to setup their own fundraising pages



5. GiftTool Donation Service

GiftTool Donation service allows your organization to accept secure online one-time donations via credit cards, as well as, process online monthly donations. With GiftTool, your organization can:

- Create an unlimited number of donation appeal pages in English, French or Spanish:
 - One Time Donations; Recurring Monthly or Quarterly Donations; In Tribute Donations; Specific Funds; Seasonal Campaigns.
- Create a thank you message automatically sent to all donors, or customize a specific message for each targeted giving program. Confirmation emails will also include a summary of their donation.
- Customize the text appearing in the introduction of each section of the donation page.
- Modify your donation pages by adding suggested contribution levels, additional questions, a 'Donation in Honor of / In Memory of...' section, and much more.
- If your organization has a list of recurring donors, you can input the details in the GiftTool BackOffice to have the donations processed on a monthly or quarterly basis on the date that you specify.
- For Canadian charities able to issue tax receipts for donations, an encrypted electronic tax receipt can automatically be sent to online donors at no extra charge. Additionally, for donations your organization receives 'off-line' outside of the online donation process, you can also use the GiftTool system to issue a single or multiple e-tax receipts by importing a list of donations (\$0.35 per electronic tax receipt issued). If you need a copy of a past tax receipt, you can access PDF copies of all electronic tax receipts (stored in the system for a minimum of 7 years). **[Not required for US charities as the on-screen confirmation receipt is generally adequate for US tax filing purposes]**



The Preservation Trust of Vermont
Continuing Support for Vermont Communities Since 1980
 104 Church St., Burlington, VT 05401 • 802-688-8647 • www.ptvermont.org

Secure Donations

The Preservation Trust was founded to assist the on-going effort to help save and use Vermont's rich collection of historic architectural, cultural, and community resources.

To accomplish this critical goal, the Preservation Trust provides technical assistance to communities and groups, provides financial support to local preservation projects in partnership with a variety of funders, undertakes local and statewide education and recognition programs, and works with partners to pass legislation and galvanize local advocacy to strengthen Vermont's downtowns and village centers.

Your contribution will be used to support our work throughout Vermont.

Beginning in October 2006, the Preservation Trust of Vermont will be partnering with the Mad River Glen Cooperative to raise money for the Single Chair Project at Mad River Glen Ski Area. If you wish to make a targeted donation for this project, you may do so below.

Personal Information

In order to fully process your donation, you must provide your complete name, mailing address, email address and phone number.

Title (Mr Ms Mrs ...):

First Name:

Last Name:

Street:

City:

Province/State:

Country:

Postal/Zip code:

Email:

Below are some examples of non-profit clients using GiftTool to handle their online donations -- demonstrating GiftTool's ability to customize the look to match a client's website and online objectives.

Broome Community College:

<https://www.gifttool.com/donations/Donate?ID=235&AID=3749>

FAMF / FAMF:

<https://www.gifttool.com/donations/Donate?ID=1280&AID=714>

Langley Memorial Hospital Foundation:

<https://www.gifttool.com/donations/Donate?ID=1779&AID=4889>

Light Up the World

<https://www.gifttool.com/donations/Donate?ID=1590&AID=274>

Peace Arch Hospital & Community Health Foundation:

<https://www.gifttool.com/donations/Donate?ID=1868&AID=561>

Cochrane & Area Humane Society:

eCards: <https://www.gifttool.com/donations/Donate?AID=125&ID=1427>

Down Syndrome Association of Toronto:

<https://www.gifttool.com/donations/Donate?ID=2230&AID=3813>

FIRST Washington:

<https://www.gifttool.com/donations/Donate?ID=2255&AID=4064>

New Brunswick Public Libraries Foundation:

<https://www.gifttool.com/donations/Donate?ID=106&AID=4388>

National Reading Campaign:

English - <https://www.gifttool.com/donations/Donate?ID=2079&AID=2464>

French - <https://www.gifttool.com/donations/Donate?ID=2079&AID=2465>

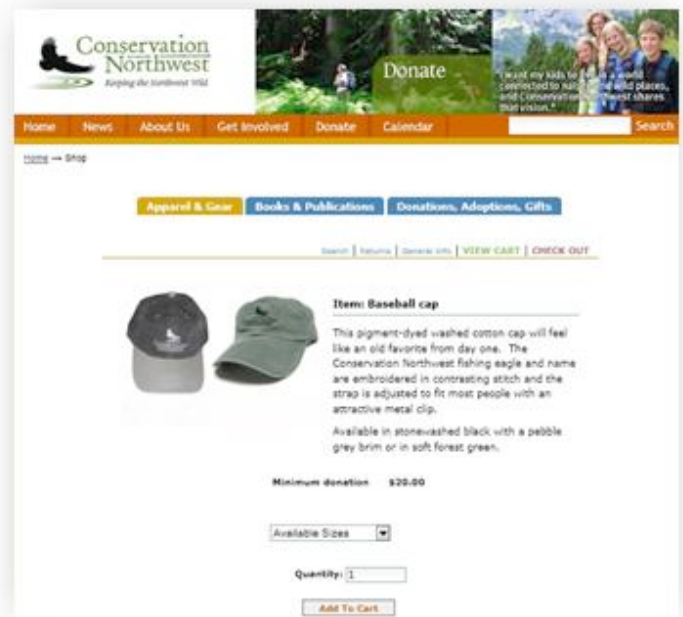
6. GiftTool Shopping Cart Service

Online commerce represents a significant marketing opportunity for organizations to enhance member services and generate additional revenue. The GiftTool Shopping Cart lets you join in e-commerce, without the usual costly setup costs and ramp-up time.

GiftTool's shopping feature emulates a real-life shopping experience. Customers visit a department, choose their merchandise, go to the check-out, choose a shipping option, and pay by credit card. GiftTool confirms their purchase and emails them a transaction confirmation. Your customers can shop with confidence using GiftTool — all GiftTool transactions take place over a secure server.

With GiftTool you can:

- Customize the look of your shopping cart, creating an unlimited number of departments and offering an unlimited number of items for sale.
- Create your eStore in English, French or Spanish.
- Upload images and descriptions for each product.
- Have different prices for volume purchasing, and sell multiple sizes or colors of any item.
- Optionally, sell electronic items that can be instantly downloaded once a shopper has completed their online payment. Electronic files can include documents, photos, audio or video clips, streaming video using QuickTime, and other digitized files.
- Specify the amount of stock available, so that your online store will display a 'sold out' message when items are no longer available for purchase.
- Customize your shipping options for US, Canadian and/or International destinations.
- Restrict online shopping to certain countries only, or allow anyone to purchase your merchandise.
- Track order fulfillment by changing the status of the order from *Ordered* → *Processed* → *Packaged* → *Shipped*.



With your username and password, you have access to your orders from any Internet browser 24 hours a day. Your data is updated instantly when a shopping order is made. You can conduct data analysis in real-time, viewing both historical and current data; and download your data into an excel spreadsheet at any time.

Below are some examples of clients using GiftTool to handle their online eStore needs -- demonstrating GiftTool's ability to customize the look to match a client's website and online objectives.

Raising the Roof:

English: <http://www.gifttool.com/shop/ShopProductDetails?ID=1676&VER=1&LNG=EN&PID=55116&DID=1197>

French: <http://www.gifttool.com/shop/ShopProductDetails?ID=1676&VER=1&LNG=FR&PID=55115&DID=1199>

Pacific Assistance Dogs: <https://www.gifttool.com/shop/Storefront?ID=1580&VER=1&LNG=EN>

Ignatius Jesuit Centre of Guelph: <https://www.gifttool.com/shop/Storefront?ID=1509&VER=1&LNG=EN>

Environmental Law Centre:

<https://www.gifttool.com/shop/ShopProductDetails?ID=2124&VER=1&LNG=EN&PID=56647&DID=1258>

East Coast Trail Association:

<https://www.gifttool.com/shop/ShopProductDetails?ID=2023&VER=1&LNG=EN&PID=57121&DID=1295>

Royal Vancouver Yacht Club:

<https://www.gifttool.com/shop/ShopDepartment?ID=2141&VER=1&LNG=EN&DID=1275>

City of Sarnia: <https://www.gifttool.com/shop/ShopProductDetails?ID=2285&PID=57554&DID=1356>

7. GiftTool Membership Management Service

GiftTool Membership Management service allows you to accept secure online registration & dues collection. With GiftTool, you can:

- Setup an unlimited number of membership types, which will be listed individually in your monthly statement for convenient tracking [English only].
- Specify the length of the membership: Lifetime membership; memberships expiring on a fixed date; or memberships expiring after a certain number of days/months have elapsed since their online registration.
- Automatically include membership cards in the confirmation email sent to members.
- In addition to paying by credit card, allow members to pay by check or money order (the membership will remain as pending until you receive the offline payment and manually activate their membership).
- Optionally, have members accept a waiver before completing their registration form.
- Optionally, add questions to gather more info from your members.



The screenshot shows the CCSD membership registration interface. The left sidebar contains a menu with items like 'About CCSD', 'News', 'Research', 'Publications', 'Stats and Facts', 'CSDS', 'Membership', and 'Sub Sites'. The main content area has a header with the CCSD logo and navigation links. Below the header, there are tabs for 'Account Information', 'Personal Information', 'Additional Information', and 'Payment'. The 'Account Information' tab is active, showing a form for 'Returning Members' and 'New Members'. The 'Returning Members' section asks for email and password to retrieve a profile. The 'New Members' section asks for email address and password creation. There are 'Back' and 'Save & Continue' buttons. At the bottom, there is a 'Forgotten your password?' section with an email input field and an 'Email me my password' button.

The GiftTool system can also automatically authenticate member passwords when members register online for an event -- this works synergistically with the GiftTool Event Registrar service to automatically authenticate membership status and offer discount pricing for the member when they register for events.

Optionally, you can offer your members access to a password-protected area on your website that allows members to:

- Keep their contact information updated;
- Access your multi-media content and PDF documents;
- Select their interests;
- View their signed waivers;
- Post a comment to a Blog;
- "Ask the Expert"

Below are some examples of non-profit clients using GiftTool to handle their online member registration -- demonstrating GiftTool's ability to customize the look to match a client's website and online objectives:

West Coast Railway Association:

<https://www.gifttool.com/memberships/MembershipDetails?ID=2083&LNG=EN&VER=1&MSID=593>

Camp Fortune Ski Club: <https://www.gifttool.com/memberships/MembershipDetails?ID=1335&MSID=719>

East Coast Trail Association: <https://www.gifttool.com/memberships/MembershipList?ID=2023&VER=1>

Environmental Ed. Assoc. of Illinois: <https://www.gifttool.com/memberships/MembershipDetails?ID=2264&MSID=740>

8. GiftTool Surveys, Tests and Ballots Service

GiftTool Surveys, Tests and Ballots service allows you to:

- Create an unlimited number of online tests and surveys in English, French or Spanish.
- Include as many sections and questions as you want.
- Create an introduction and closing message.
- Choose from a large variety of question styles: multiple choice (select 1 only), multiple select (select 1 or more), essay answer, true/false, matrix questions, drop down list, Likert scale, etc.
- Display your questions in a specific order or randomly; all on one page or on a separate page with a status bar indicating the amount remaining.
- Include branching logic, to skip unnecessary questions based on their response to a previous question.
- Instantly track the number of individuals who have completed the survey or test, once it is live, so that you can send out reminder notices if needed.
- Choose to set up the survey or test on a secure SSL GiftTool server to protect critical information.
- Identify if an individual has completed the survey or test multiple times, viewing the results separately for each test attempt.
- For tests, the system will automatically grade answers, including pattern matching of essay questions.

Section: 1						
Title: 1						
Question: Do you recall receiving an e-mail message inviting you to register for the Program?						
		Average Score	Response Percent	Response Total	Cross Tab	
Yes		0.0	100.0 %	24	Include	Exclude
No		0.0	0.0 %	0	Include	Exclude
Totals			100.0 %	24		
Title: 2						
Question: Did you open the e-mail message?						
		Average Score	Response Percent	Response Total	Cross Tab	
Yes		0.0	29.166666 %	7	Include	Exclude
Yes	from provincial office	0.0	4.166666 %	1	Include	Exclude
Yes	I am an Aerplan member and supporter and this looked like a great way to support	0.0	4.166666 %	1	Include	Exclude
Yes	I am an employee and support organizational initiatives	0.0	4.166666 %	1	Include	Exclude
Yes	I knew about the promotion and wanted to read more.	0.0	4.166666 %	1	Include	Exclude
Yes	I respect the person who sent it to me	0.0	4.166666 %	1	Include	Exclude
Yes	I was expecting it as my friend had informed me about it	0.0	4.166666 %	1	Include	Exclude
Yes	i was interested	0.0	4.166666 %	1	Include	Exclude
Yes	I was interested in finding out about the Program.	0.0	4.166666 %	1	Include	Exclude

Our reports section, which you can access at anytime from your client account using your password, allows you to analyze your data in many ways:

- View a summary report with aggregate results by question.
- Cross tabulate aggregate survey results by viewing data for only those individuals who have responded in a certain way for a specific question.
- View responses by each individual survey or test taker.
- Download an excel spreadsheet displaying all responses, which can be saved to your hard drive.