The Diocese of Southwark

THE CHURCH OF ENGLAND

Contactless Device Manual

Payaz Passbox

Produced by the Diocese of Southwark's Giving Team, with thanks to Parish Buying and the National Church's Giving Team.

Version 2 | November 2021

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Why Contactless?

Contactless giving provides a safe and easy way for people to make gifts in our churches. Ideal for those one-off situations such as visitors at key festivals or baptisms, they are also versatile for fundraising, taking payments, and for when regular givers want to top up their regular gifts!

People are using cash less and less these days, particularly since the coronavirus outbreak. With estimates that soon less than one in 10 transactions will be made with cash, our churches must provide ways for people to give that suit people's new cashless habits.

Important Notice: Currently Out of Circulation

Please note that the Payaz Passbox is no longer in circulation, so additional devices of this model are no longer available to purchase. There is no reason why you should, but if you do have any queries about or issues with your device, please contact Payaz (see page 15).

Introducing Payaz, SumUp & Give A Little

The Payaz Passbox works by combining three different components: Payaz provide the hardware, Give A Little provide the software (a donations app pre-installed on the device tablet), and SumUp provide your merchant account (a bit like a bank account; SumUp is the company that processes payments and deposits funds into your church's bank account).

Hardware Provider	Software Provider	Card Merchant
Manufacture the physical machine to accept donations.	Design the interface on the machine which donors use.	Securely process the card donations on your behalf.

Share Your Experience

We are delighted that so many parishes are trying new ways of giving, and we would like to hear how contactless giving has worked for you. Please do send us any stories, photos, and feedback that you have to pgs@southwark.anglican.org.

Technical Information

Connectivity Required

The Payaz Passbox does not accept donations unless connected to the internet via WiFi or 4G. If you do not have WiFi in your church building, you can run the device on mobile data by using a SIM card.

To avoid having to set up a contract with a phone provider, we would advise using a pay-as-you-go SIM card, which you could top up monthly or annually.

If you indicated that you need a SIM card, we have included one from InfiSim (M2M). This SIM will need to be activated over the phone by calling 0333 313 5005. We would advise that you opt for the 500MB a month package, which costs £96 + VAT for the year. For more information and to check their network coverage, go to infisim.com/m2m-sim-cards.

SumUp Account Required

You will need a SumUp account to accept donations through this device. If you have not yet set up an account, please contact a member of our Giving Team and we can walk you through the process step-by-step.

Transaction & Software Fees (November 2021)

SumUp deduct transaction fees of 1.1% for contactless or Chip & PIN transactions made with debit cards, 1.3% for those made with credit cards or AmEx, and 1.95% for donations made online. These rates have been specially agreed for Parish Buying members and are more competitive than SumUp's commercially available rates.

Give A Little premium membership is currently provided free of charge to Parish Buying members; should this change in the future, you can choose to drop-down to the basic membership, which is free, though please note that there is an annual donations cap of £1000 for the basic membership.

Unattended Use

The Payaz Passbox is not designed to be left unattended. As such, we would advise that it is only used during services and other activities where the device can remain in view.

Battery Life

When all components are fully charged, the battery life is up to 4 hours, though we advise fully charging it before each use.

Please note that the Passbox should not be left on for extended periods of time, such as overnight.

Quick Start Guide

Step 1: Charge

The device should arrive with enough battery to get it started, but we advise that you check it is fully charged it before using it. Please note that when the battery is fully drained, it may require 10 minutes of charging before it will be able to switch back on again. The USB cable charges both the SumUp reader and the screen; if it looks like one is not charging, check under the Passbox cover that the cables are securely connected.

Step 2: Create an 'App Campaign' (on a computer)

An 'app campaign' refers to how you want the donation screen to look on your device. You can have multiple app campaigns, which allows you to tailor the giving ask depending on the context in which the device is being used. See page 7 for step-by-step instructions.

Step 3: Switch On

Switch on the screen by pressing the small button on the right-hand side, holding until it lights up. Switch on the card reader by pressing and holding the button on the right-hand side.

Step 4: Get Connected

Connect to the WiFi through the screen settings, which can be access by clicking the cog icon on bottom right of the main menu. Once in the 'Settings' menu, select 'Network & Internet', and finally 'WiFi' where you can select the network you wish to connect to. Once connected, tap on the arrow in the bottom left-hand corner to return to the main screen.

If you are using mobile data, make sure that your SIM card has been activated and inserted into the phone component of the device.

Step 5: Login

From the main screen, tap on the Payaz / Give A Little icon to open the app, and login with your SumUp account details. Once logged in, swipe in from the left of the screen to open the menu, select 'Campaigns'. Choose the campaign that you would like to use and tap 'Use' to confirm.

Step 6: Accept Donations

To make a donation, select an amount and then tap the card reader as prompted. The card reader will illuminate along the bottom and beep when a successful payment has been made, and you will be presented with a "Thank You" message on screen. The Passbox accepts contactless donations from £1 upwards. For donations made via Chip & PIN transactions, a card can be inserted into the card reader on the top of the device.

Top Tips for Receiving Contactless Donations

1. Location, Location, Location

The perfect location will be where people can see your device and conveniently stop to donate! Make sure that where you set up also has the best possible connection, as well as a charging point where cables are not a trip-hazard.

2. Promote & Explain

Eye-catching posters will help draw people's attention to the opportunity to give. We have produced some posters for you to use with the device, included in this pack. Make sure that people know how to give, and the benefits of contactless giving. Perhaps someone could give a short notice during a service, with a demonstration of how to give. You can download a digital copy of our Payaz poster here.

3. Share Your Story

Not only do people need to know how to give, but why. It is key to share your story as a church, to help connect in people's minds what their giving is enabling. Next to contactless units you could have leaflets which talk about the mission and vision of your church, any ministries you want to highlight, and how you serve your community.

4. Claim Gift Aid

All contactless donations under £30 qualify for GASDS. For claims outside of GASDS, your Give A Little campaign can collate your Gift Aid declarations for you. See page 13 for more information.

5. Thank People

Gratitude is such an important part of our generosity, so make sure that you thank those who give! Make sure your promotional materials express your thanks for people's giving, however they have contributed to the mission and ministry of your parish. You can also personalise the thank you message that appears on screen after a donation is made.

6. Stay Safe

At this time, we recommend that you provide hand sanitiser for people to use before touching a device. **Unless government advice states otherwise, please do not pass around the devices from person-to-person, in order to minimise risk.**

Setting Up a Campaign

Once you have logged into the Give A Little app on your device, you will need to load a campaign. You can create campaigns on the device screen or on through the Give A Little portal online – for ease of use we would advise using the latter.

You can create multiple campaigns for different contexts, such as: general funds, a roof appeal, church café sales, mission fund, a collection for another charity, and bookstall sales. Campaigns enable both contactless and online giving through Give A Little.

Add New Campaign

To begin, log into your Give A Little account online (givealittle.co/login). Then, click 'Campaigns' in the bar across the top of the screen and then click 'Add new'.

Select a type of campaign to create. For campaigns to run through a contactless giving device, choose 'App campaign'. If you would like to make one for receiving donations online, choose 'Web campaign'. Once you have selected a campaign type, click 'Next'.

You can choose from a variety of campaign layouts, where you can customise colours and upload your own images. The simplest option is to choose the 'Basic' campaign style.
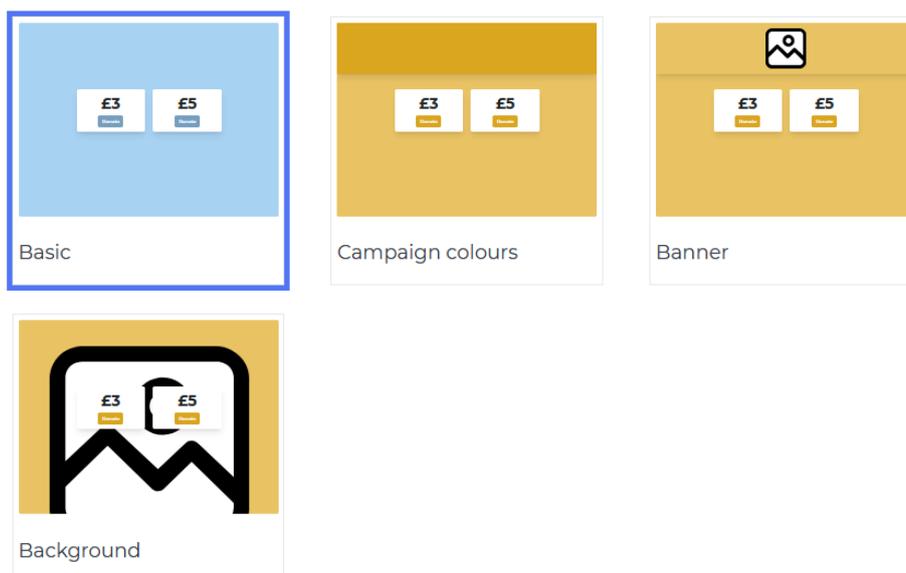
NB: You cannot change the campaign layout once you finish setting up your campaign, so it is worth thinking about whether you want to include an image or not at this stage.

Campaign Details

Next fill in some campaign details. Under 'Heading', put your church's name. In the 'Message' bar, write a short invitation for people to give. For example, "Please give generously to the work of our church" or "Support our ongoing work in the community". Please note that there is a limit of 70 characters. Click 'Next' to move onto the next section.
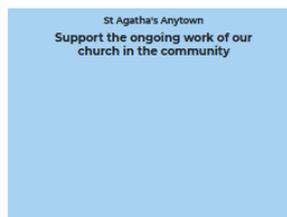
Set some suggested donation amounts. We would advise that the lowest suggested amount for contactless giving is £5, and for online is £10. Four different amounts work well in a campaign, so choose a range that will engage your church community well. We recommend that you switch on the 'Choose your own amount' button so that people can select another amount to donate. Click 'Next' to move onto the next section.

In the 'Donor Premium options' settings, you can switch on the ability to capture Gift Aid donation details, as well as offer contact opt-in if you would like to collect supporters' contact details. You can also opt to allow recurring donations through Give A Little, though we would strongly advise parishes to use free tools such as the Parish Giving Scheme or standing orders to enable recurring gifts.

Click 'Next' to move onto the next section.

Next, customise your thank you message to add that personal touch for your donors. This could be as simple as, "Thank you for supporting St John's". You can switch on the option to offer a donation receipt, though we recommend that you leave this off for contactless campaigns to make the process more efficient.

Name Your Campaign

Finally, name your campaign. This can be a useful label for your Treasurer to see where giving income has come from. We recommend that you include what the fundraising is for and how it was given in the campaign name. For example, "St A's Contactless General" or "St A's Contactless Xmas Appeal". Please note that your campaign name will be visible to donors on their receipt and in their web browser (for 'web campaigns' i.e. online giving).

For web campaigns, you will finally need to click 'Publish' to make the page accessible.

Additional Campaign Information

'List of' Function

Where you have more than one app or web campaign, you can give the donor a choice of campaigns to donate to using the 'List of' function. This can be useful if e.g., you have a general giving campaign, but you are also fundraising for a specific project.

To create a list of campaigns, click 'Add new' in the Campaign menu. Then select 'List of app campaigns' or 'List of web campaigns', depending on whether this is for your contactless device or online giving. Next, choose a layout. Then, add a general heading and message, that straddle the various campaigns. When prompted, select the campaigns that you would like your donors to choose from. Finally, name the list; this is to help you find it in the admin menu and is not seen by donors.

Share a Web Campaign via a QR code

QR codes act as a bridge between the offline and online world, by directing people to a website with a unique code image. Through a QR code, people can make a donation to your church's online giving page on their smartphone.

To download your online giving page's QR code, first return to the main 'Campaigns' section of the website by clicking in the menu across the top. Under 'Web campaigns' you can see your online giving page(s), and the option to 'Download QR code'. Click that and save the PNG file as prompted.

Once you have your QR code saved, you can insert it into a variety of media to share with your church community, such as posters, services sheets, and pew cards. For ideas on how to share your QR code well and to access our template resources, read our blog post 'Using QR Codes to Enable Generous Giving'.

Share a Web Campaign via Link (URL)

Using a web link is the best way to share your online giving page on your church's website and can enable people to donate from the click of a button anywhere online.

To copy your online giving page's link, first return to the main 'Campaigns' section of the website by clicking in the menu across the top. Under 'Web campaigns' you can see your online giving page(s), and the option to 'Copy link'. Open a new web browser tab and click paste (Ctrl-V) in the address bar, and you will be able to see the online giving page for donors to give through. Bookmark this webpage in your browser so that you can easily access it as needed.

Once you have your web link ready, you can share it in many ways online such as on your website, social media pages, and through livestreamed services. For more ideas and examples, read our blog post 'Top Tips for Sharing your Online Giving Page'.

Donations Reporting

Give A Little Reporting

All donations are reported via the Give A Little online portal, available to your account holder. Give A Little provide reporting on the following:

- Time and date of donation
- Campaign totals (see how much you have raised for different campaigns)
- Name of donor – only where a Gift Aid declaration has been made
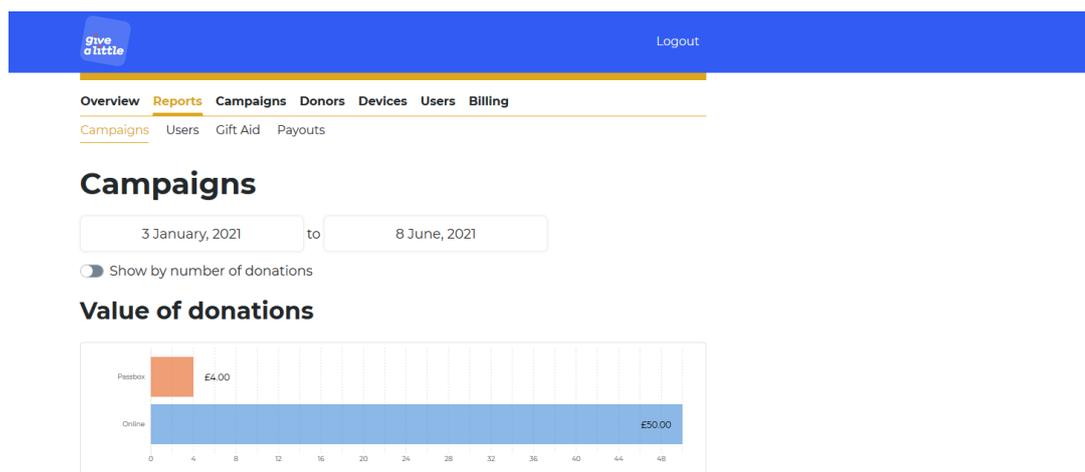
The portal produces download a spreadsheet (.csv) containing each individual donation and the information related to it, which you can download by following these steps:

1. Go to givealittle.co and login with your account details.
2. Click 'Reports' in the banner across the top of the screen.
3. Select a date range for which you would like to produce reporting for.
4. Click 'Export full report' at the bottom of the screen.

Gift Aid Reporting

Give A Little also produce Gift Aid reports for you in an HMRC friendly format, where your contactless device has collated Gift Aid declarations. To access these, follow these steps:

1. Go to givealittle.co and login with your account details.
2. Click 'Reports' in the banner across the top of the screen.
3. Click 'Gift Aid' in the sub-banner across the top of the screen, under 'Reports'.
4. Select a date range for which you would like to produce reporting for.
5. Click 'Export for HMRC' at the bottom of the screen.

Please practice good data-handling by keeping these reports containing donors' personal details secure. Where appropriate, you could use this information to write a thank you note to those who have given.

SumUp Reporting

All donations are also reported within the SumUp online portal, which is also available to your account holder. Through SumUp's portal, you can download reports in .csv or .xls format.

SumUp provide reporting on the following:

- Time and date of donation
- Which campaign donations we received through ("Description" in spreadsheets)
- Fees deducted
- Date of settlement ("Payout date")
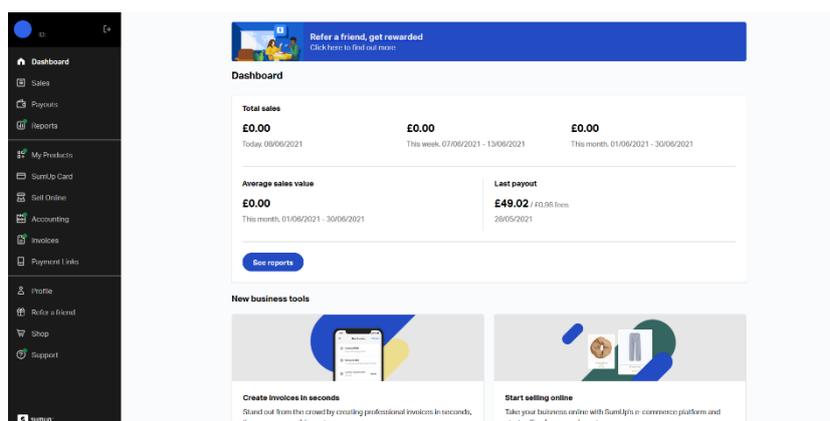
To access and download reporting from SumUp, follow these steps:

1. Go to sumup.me and login with your account details.
2. Click 'Reports' in the menu on the left-hand side.
3. Select a date range for which you would like to produce reporting for, via the blue button at the top left on screen.
4. Click on any of the report types that you would like to download, such as 'Transactions Report'.
5. Select which file format you would like to download the report as (.csv or .xls) and then click 'Export file'.

The SumUp reporting does not contain full information for Gift Aid claims, for which we advise using Give A Little.

SumUp Settlements

The funds you raise are settled into your account by SumUp (less the transaction fees). By default, your settlements – referred to as "payouts" by SumUp - are set to daily (every business day, excluding weekends and bank holidays). If you do not want to receive daily payouts, you also have the option of weekly or monthly, which you can change in your SumUp profile settings. Discuss with your PCC Treasurer what works best for your team, as you weigh up cash-flow and ease of bank reconciliations.

Reporting on settlements is available through both the SumUp and Give A Little portals.

Claiming Gift Aid on Contactless Donations

Gift Aid Small Donations Scheme (GASDS)

Contactless donations of £30 and under qualify for the Gift Aid Small Donations Scheme (GASDS) – for which you do not need Gift Aid declarations. The reporting provided by Give A Little or SumUp is sufficient to claim GASDS.

To claim GASDS on contactless donations, you must be able to supply evidence of:

- when donations were collected (which both SumUp and Give A Little reporting provides);
- where donations were given. (If you are claiming under the community buildings rules, likely as a multi-church parish, you must be able to supply evidence that collections were taken at gatherings of at least 10 people.)

Please note that you can claim up to £2,000 a year through GASDS (i.e., from £8,000 of cash and contactless donations in total). Beyond that, you will need declarations to claim Gift Aid. The maximum amount of GASDS you can claim is 10 times the total amount of Gift Aid donations you have claimed in that tax year.

Gift Aid Declarations

For gifts outside of the Small Donations Scheme, you can claim Gift Aid if you have captured a declaration. The Gift Aid declaration function is available through the premium version of Give A Little (currently free for Church of England parishes).

Should you ever change your Give A Little membership to the basic function, Gift Aid declarations could be captured by a paper form, placed next to your device. In order to match your donation reporting to the gift, you will need to capture the date, time and amount of the gift. An example form is enclosed, which you can download online here for your own use.

Gift Aid & Sales

You cannot claim Gift Aid on any sales (in any situation where money is exchanged for goods or services - such as hall hire or banns fees). This also excludes any money received for raffles, tombola, or fundraising sales.

With regards to coffee mornings specifically, you can claim Gift Aid or GASDS under the condition that it is donation optional, not an enforced price. In September 2018 government guidance was updated on bake sales and coffee mornings to state that, "If you ask people to make a donation and offer them a coffee or cake, you could be making 25 per cent more on the funds you raise."

Please note that we would not advise that you use your contactless machine as the primary way to accept PCC fees, as 100% of fees must be paid forward (SumUp will deduct their transaction fee which you would then have to top up).

Top tip: Use a separate campaign entitled 'Payments' which has the Gift Aid capture disabled, to avoid confusion about which transactions are eligible for Gift Aid claims.

FAQs

Can I lock the screen?

In the Give A Little app, you can lock the device on the campaign that you have running. To do this, swipe from the left of the screen to open the main menu and select from the list, 'Lock Menu'. To unlock the screen, you will need to login to the Give A Little website and go to the 'Devices' tab. Here, you should be able to see your device, highlight it using the tick box on the left, then click on the 'Unlock Device' option at the top.

This option does not lock down the whole tablet, so the tablet settings are still technically accessible. It is possible to fully lock the device down by installing some additional software called Fully Kiosk, though this comes at an additional expense and will require someone reasonably tech-savvy to install it. At present, most churches find this software isn't necessary for them. However, if you would like to explore installing Fully Kiosk, please get in touch for further information (see contact details on page 15).

Why are there 'failed transactions' in my reporting?

A failed transaction simply means that someone has started the donation process but not completed it. This could be for various reasons; please bear in mind that it is common for people to interact with a device out of curiosity without much intention of making a donation. Seeing failed transactions on your donations reporting is normal and unlikely to indicate an issue with the device if you can see other donations have been made successfully.

Can more than one person access the reporting and portal?

Yes, and we would advise that more than one person has access to your account portal online to enable a smooth transition between roles. To give an additional person access to the Give A Little portal, login to the portal and click 'Users' in the banner across the top, and then click 'Invite user'. You can invite someone to be an 'Admin' or 'Volunteer'. To give an additional person access to the SumUp portal, go to sumup.me/employees (you may need to login and return to this link). Once at the Employees page you can 'Add new employee' via the on-screen instructions.

How should we report transaction fees in our accounting?

According to the Fundraising Regulator's code of conduct, "you must record the total donation amount as income, and record the charges in your accounts as 'expenditure' [normally in bank fees and charges section]." For Gift Aid purposes, count the gross donation amount and claim on the whole amount.

Support

Contact Give A Little

If you have an issue with the app, creating campaigns, or Gift Aid capture, please contact Give A Little by emailing hello@givealittle.co.

Contact SumUp

If you have any issues with SumUp, you can contact them by logging into your account online (at sumup.me) and clicking 'Support' in the left-hand menu, or you can call the customer support team (Monday-Friday, 8am-7pm or Saturday, 8am-5pm).

Telephone: 020 3510 0160 | Email: support@sumup.com

Contact Payaz

If you have a hardware issue, such as with the screen or battery, please contact Payaz by emailing info@payaz.com.

Here to Help

If you require any further support with digital giving tools, so would like to discuss any other matters around giving, please contact a member of our team.

Telephone: 020 7939 9438 | Email: gabby.parikh@southwark.anglican.org