



The Diocese of
Southwark

Give A Little: SumUp & Stripe Manual

A guide to accepting online and contactless
donations for your church.



Produced by the Diocese of Southwark Giving Team, December 2023

With thanks to Parish Buying and the National Church's Giving Team



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Overview

Welcome to our step by step guide on how to set up your Give A Little and SumUp/Stripe accounts, enabling your church to have contactless and online giving.

Give A Little provide the software (donations app) and SumUp/Stripe provide your merchant account. A bit like a bank, they process the payments and deposit funds into your church bank account.

Before You Start Checklist

To set up your account, you will need the following details to hand:

- Church bank details
 - Account name - this must be as it is according to your bank
 - Account number
 - Sort code
- Church address and contact telephone number
- Church website / 'A Church Near You' page / social media webpage link
- Church of England church code
 - To find this go onto your church's 'A Church Near You Page', scroll down the left-hand ribbon to click 'More Information'. You will find your church code listed on 'Location information'.
 - [Click here](#) to watch a video to find your Church of England church code
 - If you are joining Stripe, please note you will need to download and save the certificate, as you will have to upload it to Stripe later.
- Two named trustees (PCC members) and their dates of birth
 - If you are registered with the Charity Commission, this will be verified via their website so do make sure that named trustee is listed on there beforehand.
- An email address
 - We strongly recommend that you enter a role-based email addresses, such as "reverend@stjohnschurch.co.uk" or "stjohnsreverend@gmail.com" as opposed to a personal email address, as part of good governance. If you haven't got one, we strongly advise you to set one up.
- Your mobile phone number

How to Create a Give A Little Account

Give A Little is a donations platform, allowing you to provide a great donation experience for your donors. Through Give A Little you can accept donations both online and in-person via a contactless giving machine.

Give A Little works by partnering with a payment processor to accept donations on your behalf and deposit them into your church's bank account. It is free to create a Give A Little Account. Once you have registered with Give A Little, you will be able to connect to a payment processor account. There are two payment processor options available:

- **SumUp:** a SumUp account can facilitate *both* contactless and online donations. You can also use your SumUp account separately with the SumUp app for taking payments. They charge a transaction fee of 1.1-1.95%
- **Stripe:** a Stripe Express account can facilitate only online donations (at a lower cost than SumUp). It can accept Apple Pay and Google Pay for online donations and also has a high donations threshold (up to £1m) in a single transaction. They charge a transaction fee of 1.1%

By registering for Give A Little through Parish Buying you will receive free access to a *premium* membership until the end of 2023, which collates Gift Aid information on your behalf.

Please note that you will have to pay a fee for the premium Give A Little account if you do not register through Parish Buying, which currently costs from £7.50 per month.

Step 1: Register or Log in to Parish Buying

If you do not have an account with Parish Buying yet, it is very simple to set up. Go to www.parishbuying.org.uk/register and follow the instructions on screen. It is good practice to create your account using a role-based email address (e.g., stagathastreasurer@gmail.com) rather than a personal email address so that the login details can be shared with others.

Multiple people within your parish or church can be registered with Parish Buying.

Please ensure that the person who will be named on your Give A Little and SumUp/Stripe accounts is registered with Parish Buying, as these names will be matched to verify your discounted transaction rates.

Once you are registered, login.

Step 2: Go to the Give A Little website

Go to <https://parishbuying.org.uk/categories/giving-and-payments/online-giving>, make sure you are logged in to Parish Buying and scroll down to 'Step 1: Create a Give A little account' and press 'Go to Give A Little's website'.

Let's get you signed up

Step 1: Create a Give A Little account

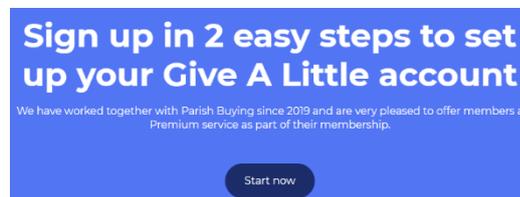
Follow this link to start the process of creating an account with Give A Little. It's important that you follow this link, rather than going directly to Give A Little, as this ensures you receive the Premium version of Give A Little for free, which has been specially negotiated for Parish Buying members.

Then click on 'Start now' in the middle of the page.



It's important that you follow the link through Parish Buying, rather than going directly to Give A Little, as this ensures you receive the Premium version of Give A Little for free, which has been specially negotiated for Parish Buying members.

Once on the Give A Little website, click 'start now'.



On the next screen, enter your email address and set a password. It is good practice to create your account using a role-based email address. Click on 'Confirm email address'.

Step 3: Verify your email address

You will be taken to a page that says 'Verify your email address'. Check the email account you signed up with and you should have an email from Give A Little. Follow the link in that email, or click on 'Resend verification email' if it has not come through.

Step 4: Accept the terms and conditions

Once you have clicked on the link in the email from Give A Little and successfully verified your email address you will be taken to a welcome screen. This explains

what Give A Little is and asks you to agree to their terms and conditions. Scroll down until you see the tick boxes. You must tick the first box to continue. It is up to you whether you tick the second box and subscribe to updates. When you're ready, click 'Next'.

Step 5: Enter your church details

Now you will be asked to enter your church details. It is best to enter your church name in an easily identifiable format including the place e.g., 'St Agatha's, Anytown' rather than just 'St Agatha's'.

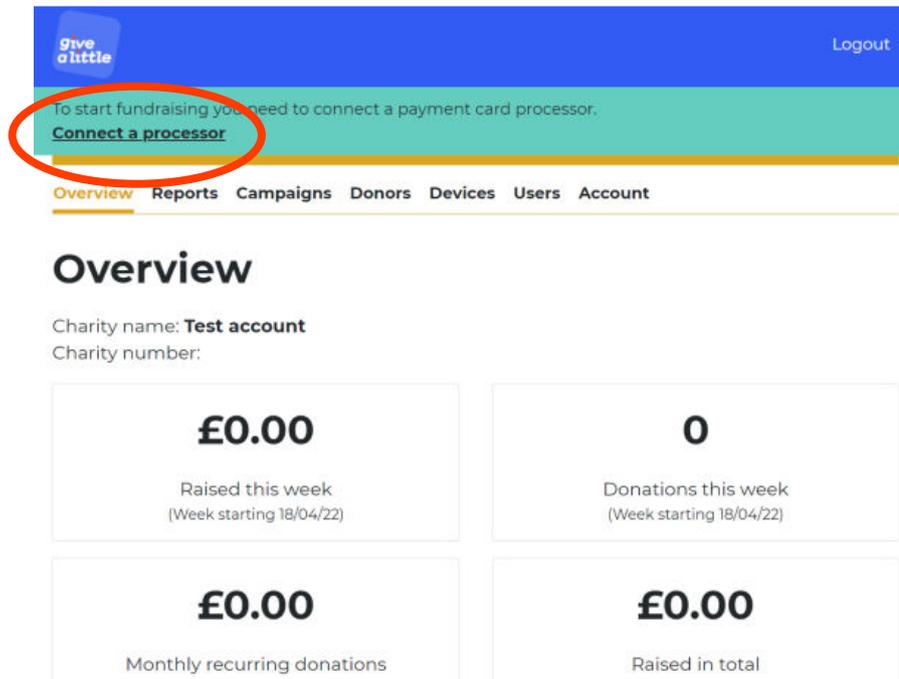
Here you also asked for your church code (sourced from A Church Near You). This is a nationally assigned Church of England code, rather than a code that your diocese may use for identifying your church. [Click here](#) to watch a video to find your Church of England church code. If you are setting up an account on behalf of a multi-church parish, use the church code for the lead church in the parish. If you are setting up an account on behalf of a benefice, you can enter the benefice ID instead (which you can also find by clicking on the button above). When you're ready, click on 'Next'.

Congratulations, you have now created a Give A Little account and are ready to connect a payment processor!

As with other important logins, please ensure that you have noted down login details and passwords and put them in a safe place e.g. the church safe. In case the account holder is ill or indisposed, then another responsible officer can access the accounts if need be.

Connect With A Payment Processor (SumUp or Stripe)

Within Give A Little, click on 'Connect a processor' in the green banner at the top of the page, or click on 'Integrations'.



Here you will see options to create a Stripe account and create a SumUp account, or connect to an existing one.

SumUp



SumUp provide in-person card-reader, and online, payment processing to facilitate your fundraising.

If you don't already have a SumUp account, you can sign up at [sumup.com](#). Otherwise, connect your existing account.

[Sign up with SumUp](#) [Connect existing account](#)

Stripe



Stripe provide online payment processing to facilitate your web fundraising.

Create a Stripe account to accept donations using web campaigns.

[Create a Parish Buying Stripe account](#)

If you're creating a SumUp Account

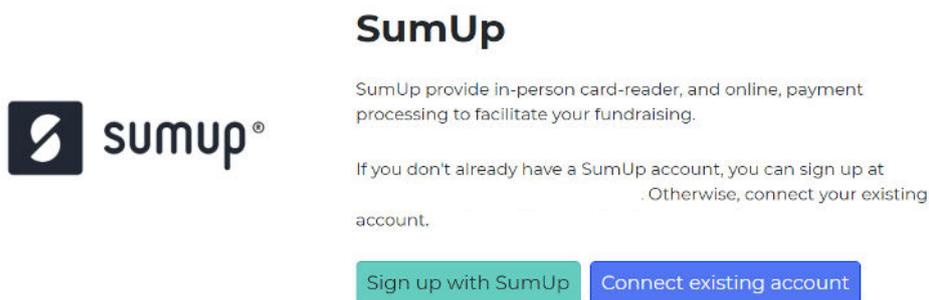
SumUp is a mobile payments provider, through which you can receive online and contactless donations in conjunction with Give A Little.

Parish Buying have negotiated lower transaction rates: 1.1% for debit cards for contactless machine donations, 1.3% for credit/AmEx, and for online donations, 1.95%. As well as these low transaction rates, Parish Buying members have access to a free *premium* membership to Give A Little for 2023, making it easy for donors to make a Gift Aid declaration for their donation.

Remember - to access these discounts you must go via the Parish Buying website.

Step 1: Login to Give A Little, or go to the SumUp website via Parish Buying

Login to Give A Little and click on 'Sign up with Sum Up'

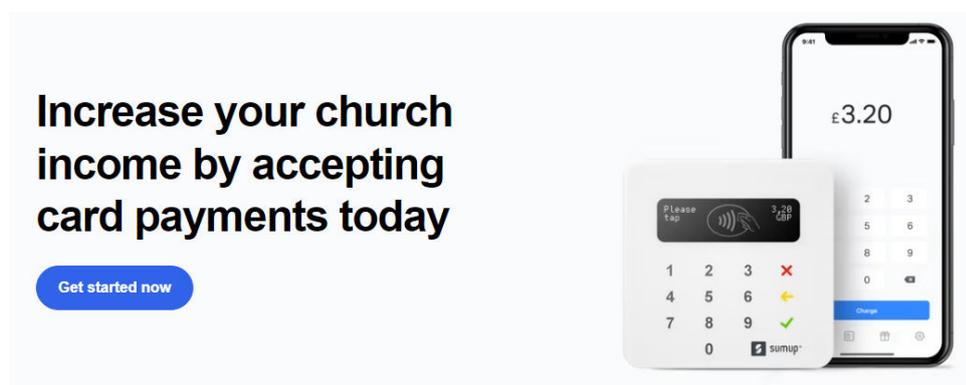


OR

Go to <https://parishbuying.org.uk/categories/giving-and-payments/online-giving>, make sure you are logged in to Parish Buying and scroll down until you are asked to go straight to SumUp. Press 'click here'.

Want to go straight to SumUp rather than the link in the step-by-step guide? [Click here](#). You can only set up a Stripe Express account via Give A Little.

Once on the SumUp page click 'Get Started Now'.



You then need to scroll down to the bottom of page and click 'I do not need a reader: Sign Up'.

I do not need a reader: [Sign up](#)

Step 2: Enter your email address and password

Please ensure that the person who will be named on your SumUp account is registered with Parish Buying, as these names will be matched to verify your discounted transaction rates. Please also use the same email address as your Give A Little account. Please make a note of your username and password.

Step 3: Read then accept the terms and conditions

Step 4: SumUp Card Reader Option

When asked if you would like to order a SumUp card reader, select 'I already have a reader' at the top of the screen to continue with your registration. Even though you may not have a reader, we ask you tick this box to get the registration completed.

You can make the necessary purchases after you are registered, and a voucher for a discounted reader will still remain if you choose to purchase a reader later. (Please note, you are not required to purchase a reader if you are intending to buy a CollecTin More or Payaz Giving Station - as it is part of the machine and comes with the purchase)

Step 5: Business Related Application Details

For legal type of your business, select 'Other business type'.

Where it asks, 'What type of business is it?', select 'Limited company (Ltd)'.

In the 'Company name' field, type the name of your church as it is on your bank account (e.g., 'PCC of St Agatha's Anytown').

Where it asks, 'What is the nature of your business?', scroll down to 'Other' and select 'Charitable organisation'.

When it asks 'Describe your business', type: 'Church'. In the company registration number field please enter your church code adding the two letters 'CE' first.

You are unlikely to have a VAT ID, so ignore this field, and move on.

Enter a telephone number and your church website, or your 'A Church Near You' or Facebook webpage if you have one.

Enter the address of your church in 'Business address'. If your church has a separate postal address to the location of the building, preface the address with 'c/o' (e.g., 'St John's Parish Office, c/o 4 Chapel Court...'). This should be the same address as registered in your church's bank account.

Step 6: Personal Application Details

In personal details please enter your first and last name in the fields provided and your date of birth. Your registered home address is needed for verification purposes.

Step 7: Beneficial Owners

Where you are asked to list "all individuals who directly or indirectly own 25% or more" of your church, this is simply asking for details - for financial compliance purposes - of "trustees" (PCC members) of your church. We suggest adding one other person such as a churchwarden, your vicar or treasurer. Do ask for their permission before using their data in this way.

Step 8: Bank Account Details

Finally, in the bank account section enter the bank details for your church. This will be the usual bank account used by your church to receive payments.

Step 9: Mobile verification

Enter your mobile phone number - a verification code will be sent to your phone. When you receive it, type the verification code into the box and click on confirm code.

Congratulations, your SumUp account is now live! Please make a note of your login details and SumUp merchant ID (often begins with M)

As with other important logins, please ensure that you have noted down login details and passwords and put them in a safe place e.g. the church safe. In case the account holder is ill or indisposed, then another responsible officer can access the accounts if need be.

If you're creating a Stripe Account

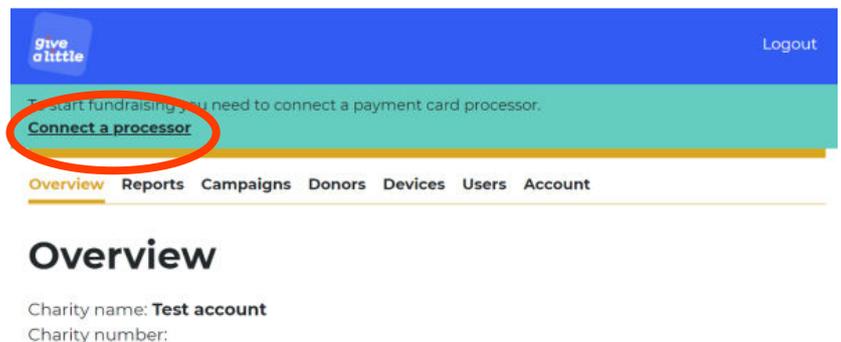
Stripe is a payments processor, through which you can receive online donations - settled into your church's bank account - in conjunction with Give A Little. If you already have a Stripe account, you need to set up a new Express Account to link it to Give A Little.

Parish Buying have negotiated lower transaction rates: 1.1% for online donations. As well as these low transaction rates, Parish Buying members have access to free *premium* membership to Give A Little for 2023 making it easy for donors to make a Gift Aid declaration for their donation. Remember - to access these discounts you must go via the Parish Buying website.

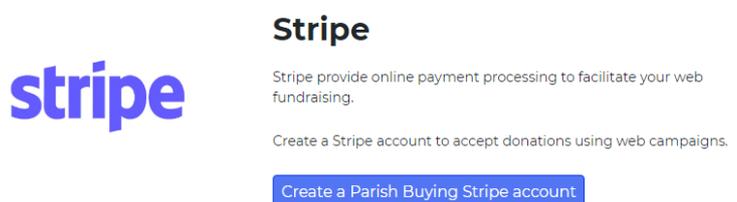
Funds will be sent to your bank account weekly, the amount will be net of the 1.1% transaction fee.

Step 1: Login to Give A Little

Login to Give A Little and click on 'Connect a processor' in the green banner at the top of the page, or click on 'Integrations'.



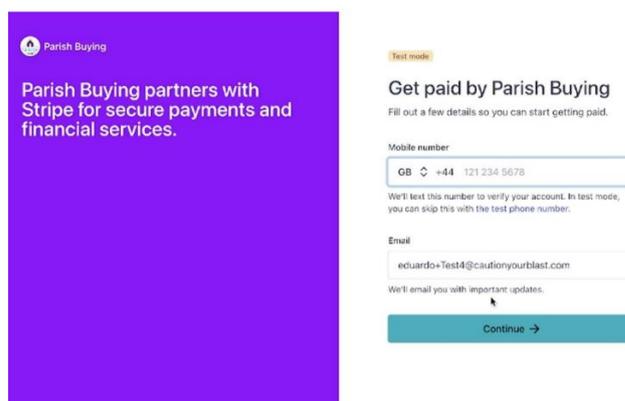
From there, click on 'Create a Parish Buying Stripe account'.



Step 2: Enter your email address and phone number

Enter a mobile phone number and email address. Please ensure that the person who will be named on your Stripe account is registered with Parish Buying, as these names will be matched to verify your discounted transaction rates.

Once you are registered, click 'Continue'.



Step 3: Enter the verification code

A verification code will be sent to the phone number you have given. When received, enter it on this screen. If you do not receive the text, click on 'Resend Code'



Tell us about your business

Country
United Kingdom

Type of business
Non-profit

Business structure
Charitable Company

Continue

Step 4: Enter initial church details

The next step is 'Tell us about your business'. Select the United Kingdom, set type of business as 'Non-profit' and business structure as 'Charitable Company'. Then click 'Continue'.

Step 5: Enter additional church details

In the 'Legal business name' field, enter the name of your church as it appears on your church's bank statement (e.g., PCC of St Agatha's Anytown). In the 'Doing business as' field, you can enter a more concise version of your church name, but it is still helpful to include the place e.g., 'St Agatha's, Anytown' or 'Anytown PCC'.

Under 'Registered business address', enter the address for your church followed by the phone number for your church.

Under 'Business website', you can either enter the URL (the website address) for your church website or, if you do not have a church website, the URL for your church's A Church Near You page. Under 'Product description', you can simply write 'Church'. Then click 'Continue'.

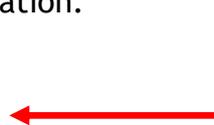
Step 6: Enter trustee information

On the next page, you will need to fill in the details of a church trustee (if this isn't you, ensure you have this person's permission). Any member of a PCC is a trustee. Fill in their name and email address. Under 'Job title', enter 'Trustee'. Completing the remaining fields on this page with the trustee's personal details and click 'Continue'.

Step 7: Enter church bank account details

On the next page, enter the sort code and account number for your church’s bank account. Scroll down and click on ‘Save’. The bank account details you save will be the one where Stripe will send donations received, net of the 1.1% fees.

Please note: Stripe is in the process of updating the wording of the declaration regarding debits that appears at this stage of the process (highlighted by the red box above). Please reference instead the signed legal statement from Stripe enclosed at the end of these instructions, which more closely aligns with governance practices for church bank accounts and supersedes the wording of the on-screen declaration. Debits to your account will only be made if a donor asks for a refund. Watch this [short video](#) about good governance for more information.



Step 8: Add a second account holder

Your account is almost set up and you will see a review screen. Under ‘Management and Ownership’ you will see the option to add an additional account holder. We recommend you

add a second trustee for good governance purposes. Please make sure you have their permission before entering their personal details. Once you have completed this step, click ‘Done’.

Step 9: Upload documentation

You have now set up your Stripe account and will have been returned to your Give A Little account where you can view your Stripe ID. The final step is to upload your church’s A Church Near You (ACNY) certificate to your Stripe dashboard. This verifies your church’s legal status.

To download your church's certificate, go to your church's page on ACNY, scroll down and click on 'More information' in the menu on the left-hand side and scroll down to the 'Proof of charity status' section.

Proof of charity status

Most churches are "Excepted Charities" and are therefore not registered with the Charity Commission. You can download a PDF that includes your church name, address and church code. This PDF, which is an extract from the Church of England's database of churches, can serve as a certificate for churches requiring proof of their charity status when registering for online and card-based giving. Click on the download button below and fill in the short form. You will then be emailed the certificate as a PDF.

DOWNLOAD CERTIFICATE

Click on 'Download certificate' and you will be asked to enter your name and email address. The certificate will then be automatically emailed to you. Return to Give A Little and click on 'View Stripe dashboard' (you will need to verify access with a code sent to the mobile phone number used when registering). Once you have entered the access code, navigate to 'Your account'. Scroll down and click on 'Professional details' and you will be able to upload your ACNY certificate.

Click [here](#) to find the Parish Buying guide to creating a Stripe account. Scroll down to page 6 if you wish to read a letter from Stripe about authorisation of monetary transfers.

Congratulations, your Stripe account is now live! Please make a note of your login details.

As with other important logins, please ensure that you have noted down login details and passwords and put them in a safe place e.g. the church safe. In case the account holder is ill or indisposed, then another responsible officer can access the accounts if need be.

How to Create and Share a Campaign

Once your SumUp or Stripe account is live, you need to set up an app (contactless) or web (online) campaign.

Step 1: Add new campaign

Once you are logged into Give A Little, you can now create a 'campaign' to receive donations through.

Click 'Campaigns' in the bar across the top of the screen and then click 'Add new'.

Campaigns

Add new

Step 2: Choose type of campaign

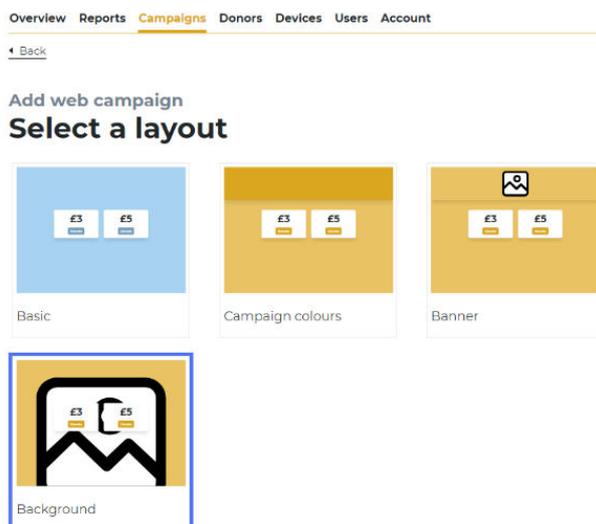
Select a type of campaign to create. If you would like to make one for receiving donations online, choose ‘Web campaign’.

For campaigns on a contactless giving device, choose ‘App campaign’. Once you have selected a campaign type, click ‘Next’.

Step 3: Choose type of layout

You can choose from a variety of campaign layouts, where you can customise colours and upload your own images or videos. The simplest option is to choose the ‘Basic’ campaign style. You won’t be able to change the campaign layout (i.e. from Basic to Background) once it has been set up, but it is easy to set up multiple campaigns. You can edit the text and colours at any time.

An app/contactless campaign will be portrait layout; an online/web campaign is landscape.



We strongly recommend that you use a layout which incorporates images - of your choosing, relating to your church - as this adds a personal touch. You might want to make a video for an attention-grabbing background. We recommend using [Canva](#) to easily create free videos that you can upload instead of an image.

Step 4: 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

Campaign details

Background

Southwark.cathedral.PNG

Upload complete

Current file: Southwark_cathedral.PNG Remove

Heading

10 characters remaining

Message

56 characters remaining

Primary colour

#

Accent colour

#

Cancel Next



70 characters. Click 'Next' to move onto the next section.

Step 5: Donation amount

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. You can also 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.

Donor options

In setting donation amounts please be aware that there is a minimum amount of £1 and a maximum amount of £1,000, the later is a limit set by SumUp. If you wish to process donations greater than £1,000 you can alternatively use the service provided by Stripe to process these payments.

Donation amounts

£ 5	Remove
£ 10	Remove
£ 15	Remove
£ 25	Remove
Add another	



Button position

- Top
- Middle
- Bottom
- Show "Choose your own amount" button

[Cancel](#) [Next](#)

Step 6: Donor Premiums

In the 'Donor Premium options' settings, you can switch on eligibility for Gift Aid and capture Gift Aid declarations, recurring donations and contact opt in.

For online giving we recommend you gather the Gift Aid details to claim your Gift Aid as you cannot use the Gift Aid Small Donation Scheme (GASDS).

For app campaigns for contactless giving, as you can claim a Gift Aid like payment using GASDS for contactless giving of £30 or less, you may wish to leave the gift aid request off to make it quicker for people to give and prevent queues forming at the machine.

(For more details on gift aid see page 25)

You can also opt to allow recurring donations through Give A Little, though we would strongly advise parishes not to switch on recurring donations and instead use free tools such as the Parish Giving Scheme or standing orders to enable recurring gifts, so you receive 100% of a donation.

Click 'Next' to move onto the next section.

Add web campaign

Donor Premium options

- Set the campaign to be eligible for Gift Aid
 - Capture new declarations
Your donor is presented with the option to make a Gift Aid declaration and can choose to include past donations and/or future donations. Or they can choose to do this later.
 - Capture Gift Aid declarations later
Your donor is not offered an option to make a declaration but can choose to be sent an email about the Gift Aid scheme with an option to make a Gift Aid declaration at a later stage.
 - Do not capture Gift Aid declarations
Your donor is not offered any option to make a Gift Aid declaration. The campaign will still mark donations as eligible if the donor is recognised as having made a declaration elsewhere for your charity.
 - Allow recurring donations
 - Offer contact opt-in
- [Cancel](#) [Next](#)



Step 7: Thank you message

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 Agatha’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.

Add web campaign
Thank you screen

Thank you message

30 characters remaining

Thank you position
 Top
 Middle
 Bottom

Offer donation receipt

Thank you background
 Diocese of Southwark Logo (2).PNG
Upload complete
Current file: Diocese_of_Southwark_Logo_(2).PNG



Step 8: Name your campaign

Finally, name your campaign. This can be a useful label for your Treasurer to see where giving income has come from. Please note that your campaign name will be visible to donors in their web browser and on their bank statement. We recommend that you include what the fundraising is for and how it was given in the campaign name. For example, “St Agatha’s Online Gift” or “St Agatha’s Roof Appeal”.

Name your campaign

Your campaign name will be displayed to your donors on their receipt.

Name

Step 9: Publish campaign

Well done - you have now created your giving campaign! The next screen summarises all your campaign details.

If setting up an online campaign, make sure to click **'Publish'** to enable giving through this campaign. Now that you have published this online page, sharing it as widely as possible is the best way to encourage giving to your church. You can share your online giving page in two ways: via the URL link, and via a QR code.

Diocese of Southwark

Template	Background	
Name	Diocese of Southwark	Change
Background	Southwark_cathedral.PNG	Change
Heading	Diocese of Southwark	Change
Message	Please donate	Change
Primary colour	#639de9	Change
Accent colour	#6bdaff	Change
Donation amounts	£5 £10 £15 £25	Change
Show "Choose your own amount" button	Yes	Change
Button position	Middle	Change
Gift Aid	Capture new declarations	Change



Share your online giving page via a web 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.

Web campaigns

Online [Download QR code](#) [Copy link](#) [View](#)

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, 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'](#).

Share your online giving page 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'](#)

Other Features

This section covers Combining Multiple Campaigns, Admin vs Volunteer Accounts and using Give a Little with contactless devices.

Combining Multiple Campaigns:

If you are wanting to raise money for a 'list' of different functions you can make multiple campaigns and advertise them together which gives donors an option of where they want their money to go.

To do this, you will need to have already created separate campaigns for each category i.e a campaign for 'St Agatha's Foodbank' and then making a campaign for 'St Agatha's Roof Appeal.' To group them together, you need to again create a new campaign, but this time select 'List of'.

Add new Select a type

- App campaign
- Web campaign
- List of app campaigns
- List of web campaigns

Cancel [Next](#)

Add list of app campaigns Campaign choices

Select the campaigns you would like your donors to choose from.

St Agatha's Roof Appeal	Remove
St Agatha's Online Gift	Remove
St Agatha's Food Bank	Remove
Add another	
Cancel Next	

Once you have chosen your layout you can then add pre-existing multiple campaigns by clicking 'Add another'.

Once you have named your list you are ready to publish, and this campaign will give donors a list of giving options to choose from. This option is available for both contactless or online donations.

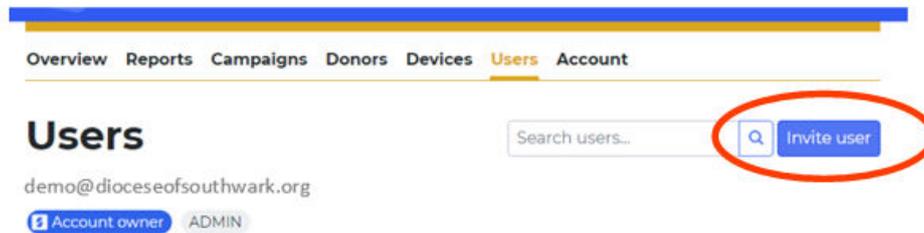


User Management: Admin vs Volunteer Account

An Admin user has full access to all features of the Give A Little platform. If others are going to help with your fundraising but you want to restrict what they can access, you can create a Volunteer account.

A Volunteer can log into the Give A Little app on the contactless machine, choose the fundraising campaign and see how much they are raising each day, without being able to access the rest of the account.

To enable this feature, log into Give A Little online and select 'Users'. Click on 'Invite user'.



Enter the desired person's email address and select 'Volunteer'. Then press 'Send Invite'. The volunteer must accept the invitation sent to them in their inbox, so please ask them to do so.

Invite user

Enter the email address and role of the new user and we'll send them an email to setup their account.

Email address

Role

- Admin
An admin has access to login to the Give A Little website, view reporting, manage all campaigns, users and settings.
- Volunteer
A volunteer has access to login to the Give A Little app and accept donations on your behalf.
- Create SumUp account
This is required if you would like this user to be able to use a SumUp card reader.

Once they have set up their account they can then log into the Give A Little App with their own log in, and the account will be linked to the admin account.

You can remove the volunteer from having access at any time, or change their level of privileges to allow them to have admin access.

How to use Give A Little with Contactless Machines

You can receive contactless donations with Give A Little through a number of machines, such as CollecTin and Payaz devices. You can also download and run the Give A Little app through any Android device, which you could pair with a SumUp card reader via Bluetooth.

To view our manuals for each machine please click here

<https://southwark.anglican.org/giving/contactless-giving/> and scroll down.

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.

How to access Give A Little Reporting (Gift Aid)

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

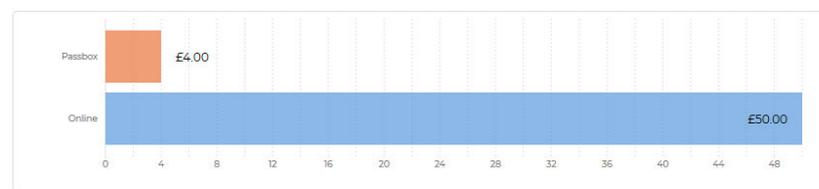
- Time and date of donation
- Campaign totals (see how much you have raised for different campaigns)
- Name of donor - only where a Gift Aid declaration has been made
- Payouts (when donations are settled to your account)

Campaigns

3 January, 2021 to 8 June, 2021

Show by number of donations

Value of donations



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 via Give A Little

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.com 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.

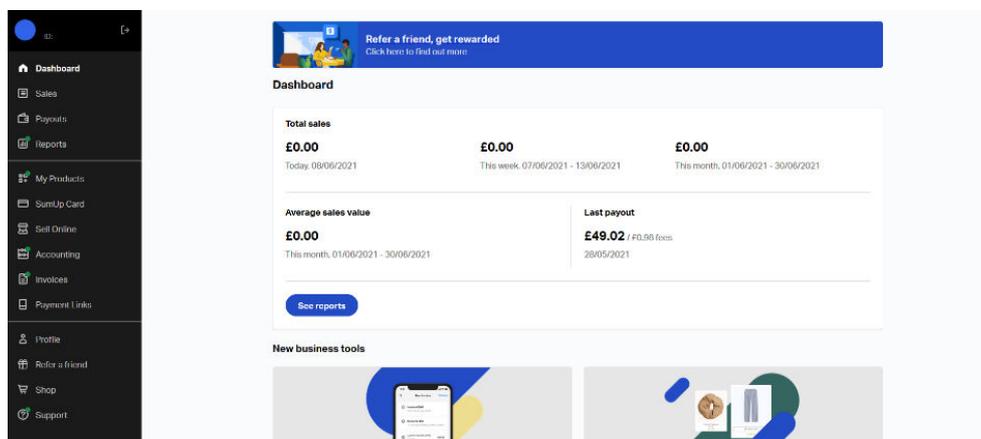
Please practice good data-handling by keeping these reports containing donors' personal details secure. Where appropriate, you could use this information to write a thank you note to those who have given.

How to access SumUp Reporting (Settlements)

All donations are also reported within the SumUp online portal. 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 (minus 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.

How to access Stripe Reporting (Settlements)

All donations are reported within the Stripe online portal. Through Stripe's portal, you can download reports in .csv format.

Stripe provides reporting on the following:

- Historical transactions
- Payments - transactions received from paying customers
- Payouts - funds transferred from Stripe to your bank account
- Fees - fees paid to Stripe, or to your Connect Platform in the form of Application Fees
- Refunds - funds returned to customers

Stripe allows you to customise your reports:

- Filtering Reports - by date range, payment method
- Adding Custom Columns - fees, payment attributes, customer attributes, product description, and more
- Exporting reports as PDF

To access and download reporting from Stripe, follow these steps:

1. Go to stripe.com and login with your account details
2. Go to the Connect Accounts page and search for the account you want
3. Click on the account's name to go to the account detail page
4. Click the View financial reports button at the top of the Activity section

Claiming Gift Aid on Digital 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 - you must be able to supply evidence that collections were taken at gatherings of at least 10 people if you are claiming under the community buildings rules.

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).

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.

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 or Stripe 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.

FAQs

For Frequently Asked Questions please see the Parish Buying website [here](#) and scroll down.

If you have any questions or require any further assistance, please look at the giving pages on the Diocese of Southwark website:

<https://southwark.anglican.org/giving/> or contact our Giving Team (pgs@southwark.anglican.org).



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