



# Payaz Giving Station Device Guide



# Version 1A 28<sup>th</sup> March 2024

(With thanks to the Diocese of Southwark and the National Church's Giving & Parish Buying Teams for their original documents)

# Why Contactless?

Contactless giving provides a quick and easy way for people to make gifts in our churches. Ideal for those one-off situations such as visitors at key festivals or life events, they are also versatile for fundraising, taking payments, and for one-off gifts from church members.

People are using cash less and less, especially since the coronavirus outbreak. It is important that our churches provide ways for communities to give that suit people's cashless habits.

# Introducing Payaz Giving Station, SumUp & Give A Little

The Payaz Giving Station device 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)
- 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)



# **Technical Information**

#### **Connectivity Required**

The Payaz Giving Station does not accept donations unless connected to the internet via WiFi or SIM card. If you do not have WiFi in your church building you can run the device on mobile data by <u>'hotspotting' or 'tethering'</u>, or you can use a SIM card.

#### SumUp and Give A Little Account Required

You will need a SumUp and Give A Little account to accept donations through this device. If you have not yet set up an account, please contact <u>Juliet Evans</u>.

#### **Transaction & Software Fees**

SumUp deduct a small transaction fee for contactless or Chip & PIN transactions. This varies across countries, but is from 0.95% - 2.5 %. Contact <u>Juliet Evans</u> for more information. Special rates have been agreed for Church of England Parish Buying members and are slightly more competitive than SumUp's commercially available rates.

#### **Please note:**

Chaplaincies should be on the Premium version of Give A Little, which is FREE (the Church of England is subsidizing this cost). Therefore, there should be NO monthly fee payable for Give A Little Premium. If you think that you are being charged – or have received an invoice – for a monthly fee, please contact <u>Juliet</u> Evans immediately and we will correct this.

Should the Church of England subsidy change in the future (no change is currently anticipated at this time) you can choose to drop down to the basic membership - which is free – but please note that there is an annual donations cap of £1,000 for the basic membership.

#### **Battery Life**

The Payaz Giving Station is designed to run on the mains power for extended periods of time. If left unplugged, the battery can last between 2 – 6 hours. Like any electrical gadget the tablet should not be left on continually and we recommend it to be switched off overnight.

# Setting up an App Campaign

To enable people to donate via card reader with this device you will need to set up a 'campaign' to appear on the screen. We recommend that you do this on a computer/laptop/tablet, not on the device screen itself, as it is much easier to set up on your computer and allows you to upload any images you might want to use.

- An **app campaign** is for contactless giving to appear on your Payaz device.
- A **web campaign** is for online giving to appear on your website (if you wish to use this technology for online giving as well as contactless giving).

#### Step 1: Log on to https://givealittle.co

#### Step 2: Choose type of campaign

As this is a contactless giving device, select 'App campaign'. Once you have selected a campaign type, click 'Next'.

#### Step 3: Choose type of layout

(Note: 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.)

You can choose from several campaign layouts for your device screen. We recommend you use the 'Campaign colours' layout, where you can change the background colours.

Note: Chaplaincies will be given a background template as a starting point for their first campaign. See the **Getting Started With Your Device Guide** for more details. (If you want to use this background template for another type of campaign but need to amend the text etc, then please contact Juliet Evans for advice.)

More 'technical' chaplaincies can use a layout which incorporates images – of your choosing, relating to your church - as this adds a personal touch. We recommend using the free Canva design programmeTraining can be provided in due course to all chaplaincies, if you are interested in this.)





#### Step 4: Campaign details

If you have chosen a 'Basic', 'Campaign Colours' or 'Banner' template, you will need to 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 and the text will appear in white. Click 'Next' to move onto the next section.

#### **Step 5: Donor options**

For all layout types you will need to add some suggested donation amounts. We would advise that the lowest suggested amount for contactless giving is 5 Euros. 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.

#### **Step 6: Donor Premiums**

In the 'Donor Premium options' settings, you can switch on for recurring donations and contact opt in. (Note: Gift Aid is not available for European chaplaincies.)

You can 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 bank transfers/standing orders to enable recurring gifts.

Heading	Diocese in Europe
Diocese in Europe	Please support our
13 characters remaining	historic building.
Message	
Please support our mission, ministry and historic building.	
11 characters remaining	
Primary colour	
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Add app campaign Donor options	
Donation amounts	Diocese in Europe
£ 5 Remove	Please support our mission, ministry and
£ 10 Remove	historic building.
£ 15 Remove	£5 £10
£ 20 Remove	Donate Donate
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Add another	Donate Donate
<ul> <li>Allow other donation amounts</li> </ul>	Choose your own amount
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Please note chaplaincy device screens will show the donation amounts in the local currency. You can switch on the option to offer a donation receipt, though we recommend that you leave this off for contactless campaigns at busy services and events to make the process more efficient. (You can also set the device to Quick Mode – see page 8.)

If your donors require a local tax receipt, then we recommend that you have information on a poster near the machine saying eg. If you need a local tax receipt, please contact the treasurer via <u>treasurer@stmaryschurch.com</u>.

Click 'Next' to move onto the next section.

#### 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'.

(Note: Chaplaincies will be given a Thank you screen image as a starting point for their first campaign. See the **Getting Started With Your Device Guide** for more details.)

#### 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 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 Gift – Card' or 'St 'Agatha's Roof Appeal - Card'.



To make a donation, select the amount you wish to give. Tap the card reader when 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. To cancel a transaction, lift the lid and press the power button on the right-hand side of the SumUp card machine.

The Payaz accepts contactless donations from 1 Euro (or local equivalent) upwards. For donations made via Chip & PIN, a card can be inserted into the card reader.



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

# **Other Features:**

This section covers:

- Offering A List of Campaigns on One Screen
- Quick Mode
- Admin vs Volunteer Accounts
- Security: Lock Menu, Fully Kiosk App, Security Chain

## Offering A List of Campaigns on One Screen:

If you want to raise money for different projects eg 'Roof Appeal' or 'Food Bank', as well as general church gifts, you can make a list of campaigns to appear together on one screen. This allows donors to choose where they want their money to go. However, we recommend that you use these restricted campaigns carefully – and ensure that people can still donate to the unrestricted church fund.

Firstly, you need to create each separate campaign eg a campaign for 'Foodbank', a campaign for 'Fundraiser to Fix Roof' etc, *before* you put them together in a list.

To group the separate campaigns together into one list, you need to again create a new campaign, but this time select 'List of'.

Choose your layout. Then you can then start to add pre-existing 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.



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## **Quick Mode**

Within the Give A Little App, there is an option to have a Quick Mode. This will show a thank you pop-up rather than a screen, and does not offer a receipt or request marketing consent. This means that people can tap and go quickly, allowing for more people to donate efficiently.

To enable this setting, log into the Give A Little App *on the device* and swipe into the centre of the screen from the left. Select 'Quick Mode' then click 'Enable quick mode'. To disable, simply swipe again to the menu and click 'Disable quick mode'.

#### **User Management: Admin vs Volunteer Account**

Give A Little has two types of users. 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 Giving Station, choose the fundraising campaign and see how much they are raising each day, without being able to access the rest of the account. A volunteer cannot edit campaigns or access donor information.

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

Enter the 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 this. You will then be able to see the volunteer email under the User tab

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.



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.

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

# Security

The key message is: No data is stored on the physical device itself.

But you should take some preventative steps to secure your data, tablet and physical hardware. There are a number of security features that come with the Payaz device.

## **Security cable**

This physical chain lock is supplied with the Payaz device. You loop it through the bottom of your device.

## **Payaz Device Keys**

The Payaz Device can also be opened/locked on the right-hand side using the keys supplied with the device.

#### Lock Menu

Within the Give A Little app, there is an option to 'Lock Menu'. Selecting this will lock the selected campaign to the app. This means that no one can access anything on the Give A Little App, except for the chosen campaign to donate to. You may wish to do this so that no one is able to look at other things on the app or change your Give A Little settings.

To enable this setting, log into

the Give A Little App and swipe into the centre of the screen from the left. Click on 'Lock menu' and then click 'Lock the menu'. Remember that you need to have already chosen the campaign you want for the screen to be locked to.

If you Lock Menu you can still access and adjust the rest of the Payaz Giving Station tablet, just not the Give A Little app.

#### Overview Reports Campaigns Donors Users Account Device Devices When you log into a cashless donation device running the Give A Little app it will register with your account and be displayed in your devices list below. To obtain devices, please review our fixed and portable product partner pages and our DIY (Do-It-Yourself) product page. Change campaign Update app Campaign Online Menu locked Update available Device ID 5789073ec7d9616a Yes No No Remove dev Previous 1 Next



To re-gain access to the app, for example if you wanted to change your campaign to a different one, you need to log into Give A Little *on their website* (on a computer, laptop or mobile phone).

Simply go to 'Devices' and tick the campaign you are using and press 'Unlock menu.'

Straight away you will see the screen refresh on your Payaz Giving Station and you will be able to access the Give A Little App again.

# Fully Kiosk App

Activating Fully Kiosk is a more complex step, so please read the instructions very carefully.

#### What is Fully Kiosk?

Fully Kiosk is additional software pre-installed on your GivingStation which locks the device on the donations screen. It stops unauthorized people from browsing on the tablet or accessing other settings or apps on the device. This is particularly important if your church building is open during the day, in a busy service or if you have a number of 'inquisitive' young people in your church family!

Activating Fully Kiosk: (Watch this video from Payaz for additional help.)

- Swipe up from the bottom of the screen and tap on the circle icon in the bottom middle to return to the home screen
- From there, swipe up anywhere on the screen to access the apps drawer
- Tap on the "Fully Single App Kiosk" app icon (blue 'f')
- [IF the app ask for permissions] :
  - o Tap 'OK'
  - Tap on the 'Fully Single App Kiosk'
  - Tap the switch button to the right of 'Allow from this source' (the switch on the right should turn blue)
  - Tap the triangle icon at the bottom left of the screen or the arrow at the top left until you are back to Fully's main screen
- You MUST type a custom PIN in the 'Kiosk Exit PIN' field (even if it appears that the field already contains a PIN); write the new PIN down. The PIN we recommend is 4316. Using this pin will enable the Diocese to support you in the event that you lose it or forget.
- Tap 'START KIOSK MODE'
- Make sure the Test Mode toggle is off (grey) and select 'YES' on the confirmation popup
- From the 'Select a Home app' menu at the bottom of the screen, tap on 'Fully Single App Kiosk' (NOT Quickstep)
- On the "Hmmm... One more try!" pop-up tap 'RETRY'
- Tap 'Always' when "Use Fully Single App Kiosk as Home" is displayed.
- You will now be taken to the Give A Little app
- Lastly, to ensure the Android settings are not accessible while in Kiosk mode:
  - Swipe up from the bottom of the screen and tap the quare icon to display the list of open apps

- $\circ~$  Swipe to the right until the 'CLEAR ALL' option appears in the middle left of the screen, after all the apps
- $\circ$   $\,$  Tap on 'CLEAR ALL' and wait for the Give A Little app to restart

#### **De-activating Fully Kiosk:**

*If you ever want to disable this lockdown feature and regain access to the tablet, you need to disable the Fully Kiosk mode.* 

- Tap the screen 7 times in a quick succession (do not panic if it doesn't work the first time, you have to do it at a fast even pace and it takes a bit of practice)
- Enter the PIN you set ('1111' is the default one) and tap 'OK'
- At the bottom of the screen tap 'STOP KIOSK MODE'
- Tap 'DISABLE KIOSK MODE' to confirm

# **Top Tips for Receiving Contactless Donations**

## 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 if you would like the device to run for a long time.

#### **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.

#### **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.

#### **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 for 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.

# **Reporting on Donations**

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

## **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 each donation
- Campaign totals (see how much you have raised for different campaigns)
- Donor email only where they have opted in for a receipt
- Donor details only where they have opted in for contact
- Payouts (when donations are settled to your account)

give a little		Logout
Overview Reports Campaigns Donor	s Devices Users Billing	
Campaigns		
3 January, 2021 to	8 June, 2021	
Show by number of donations		
Value of donations		
Fastor E400		
Octow.		£50.00

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 a report for.
- 4. Click 'Export full report' at the bottom of the screen.

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

## SumUp Reporting ('Payouts')

All donations are also reported within the SumUp online portal. Through SumUp's portal, you can download reports in .csv or .xls format. The default setting for report frequency is 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.

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")

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E Sales	Dashboard			
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🗃 Reports	£0.00	£0.00	£0.00	
My Products	Today. 08/08/2021	This week. 07/06/2021 - 13/06/2021	This month. 01/06/2021 - 30/08/2021	
SumUp Card	Averane cales value	Last navnist		
🛱 Sel Online	£0.00	60 00 649 02 /mo		
Accounting	This month, 01/06/2021 - 30/06/2021	28/05/2021	28/05/2021	
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To access and download reporting from SumUp, follow these steps:

- 1. Go to <u>sumup.me</u> 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'.

# FAQs

PLEASE DO NOT UNINSTALL THE GIVE A LITTLE APP. AS IT COMES PRE-INSTALLED, IT WON'T BE COMPATIBLE IF YOU UN-INSTALL AND RE-INSTALL IT. PLEASE CONTACT PAYAZ FOR A SYSTEM RE-SET IF ARE EXPERIENCING ISSUES ACCESSING THE APP.

## 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; 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 other donations have been made successfully.

#### How should we report transaction fees in our accounting?

According to the UK Fundraising Regulator's code of conduct, "you must record the total donation amount as income, and record the charges in your accounts as 'expenditure'. But this may vary depending on your country.

# Support

## **Contact Give A Little**

If you have an issue with the app, contact Give A Little via <u>hello@givealittle.co</u>

#### **Contact SumUp**

If you have an issue with SumUp, log into your account online (at <u>sumup.me</u>) and click 'Support' in the left-hand menu, or contact your local customer support team.

#### **Contact Payaz**

If you have a hardware issue, such as with the screen or battery, please contact Payaz by emailing <a href="mailto:support@payaz.com">support@payaz.com</a>.

#### Here to Help – and Share Your Experiences

If you require any further support with digital giving tools, so would like to discuss any other matters around giving, please contact Juliet Evans, Fundraising Adviser for the Diocese in Europe.

Phone/text/WhatsApp: +44 7384 836200 | Email: juliet.evans@churchofengland.org

# It's great that so many chaplaincies are part of this project, and we would like to hear how contactless giving is working for you. Please do send any stories, photos, and feedback to <u>Juliet Evans</u>.