

# SumUp & Give A Little Manual

A guide to accepting online and contactless  
donations for your church



**Digital Giving**

SUPPORTING PARISH MINISTRY

Produced by the Diocese of Southwark Giving Team, August 2021,  
and generously shared with Diocese of Salisbury, March 2022



The Diocese of  
**Southwark**

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## Setting Up a SumUp Account

SumUp is a mobile payments processor that allows your church to receive payments and donations. It can be used in conjunction with the donations software Give A Little. The process of setting up a SumUp account usually takes around 30 minutes. This is an essential part of being able to receive contactless or online donations.

### Before you get started, you will need:

- 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 and click on ‘More Information’. You will find your church code listed under ‘Location information’. You can watch a video of how to find this code [here](#). *Please ensure you give the code as described here, and not another type of church code that your diocese may have assigned you, for example.*
- Names of two trustees (PCC members)
  - If you are registered with the Charity Commission these details may be verified on the Charity Commission website, so do make sure that the two named trustees are listed on there beforehand.
- An email address
  - We recommend that you enter a role-based email address, 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

### Setting up your account

Follow [this link](#) to start setting up your account. *It is important that you set up your account via this link (and not by going directly to the SumUp website) otherwise your account won’t be marked as a Parish Buying account and you will miss out on the specially negotiated transaction rates for churches.*

Simply enter your email address and create a password. Read and accept the terms and conditions. Please make a note of your username and password.

If you would like to order a SumUp card reader (not required if you are receiving or buying a CollecTin More or Payaz GivingStation, or just setting up an account for online giving) you can do so at this stage. Otherwise if you don’t wish to purchase one click on ‘I already have a reader’ to continue with your registration.

You will find this option at the bottom of the page. A voucher for a discounted reader will remain available on your account for you to claim if you wish to purchase a reader later.

#### Business Related Application Details

For legal type of your business, select ‘Other legal 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, ‘How would you categorise your business?’, scroll down to ‘Other’ and select ‘Charitable organisation’.

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...’).

#### 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.

#### 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. It’s probably best to check with them first.

#### 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.

#### 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.

**Your account is now live! Be sure to make a note of your login details and SumUp merchant ID (begins with an M).**

#### **Your SumUp account is now live!**

If you have any questions or require any further assistance setting up your account, please contact our Giving Advisor, Anna Hardy ([anna.hardy@salisbury.anglican.org](mailto:anna.hardy@salisbury.anglican.org)).

## 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 in conjunction with the financial services card payments provider, SumUp. Your bank account details are set up in SumUp, and all donation money will be cleared into your bank account by SumUp. You must register with SumUp before you can use Give A Little.

There is no additional transaction fee on top of what you are charged by SumUp (1.1% for debit cards, 1.3% for credit/AmEx, and 1.95% for online donations).

By registering for Give A Little through Parish Buying you will receive free access to premium membership until the end of 2021, 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 costs from £7.50 per month.*

### Step 1: 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](http://www.parishbuying.org.uk/register) and follow the instructions on screen. Multiple people within your parish or church can be registered with Parish Buying.

Once you are registered, login.

### Step 2: Activate your Give A Little account

Go to [www.givealittle.co/parishbuying](http://www.givealittle.co/parishbuying) and click ‘Log in with SumUp’. Login using your SumUp account details.

Read through the terms of service and agree that you will only use Give A Little for charitable purposes.

## How to Create an Online Giving Page

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

To begin, click ‘Campaigns’ in the bar across the top of the screen and then click ‘Add new’.

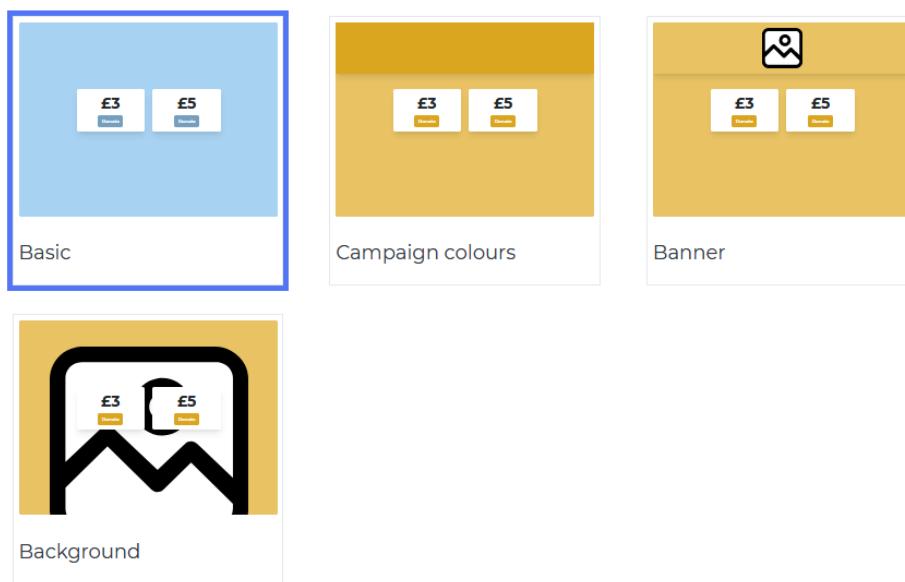


The screenshot shows a navigation bar with links: Overview, Reports, **Campaigns**, Donors, Devices, Users, Account. Below the bar, the word "Campaigns" is displayed in a large, bold, black font. To the right of the title is a blue rectangular button with the white text "Add new".

Select a type of campaign to create. If you would like to make one for receiving donations online, choose ‘Web campaign’. (For campaigns to run through a contactless giving device, choose ‘App 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.

### Add web campaign Select a layout



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.

## Add web campaign

### Campaign details

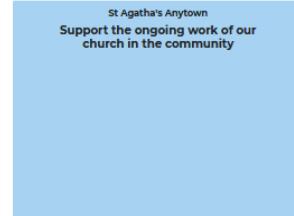
Heading

11 characters remaining

Message

15 characters remaining

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



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.

## Add web campaign

### Donor options

Donation amounts

£ 5	<input type="button" value="Remove"/>
£ 10	<input type="button" value="Remove"/>
£ 20	<input type="button" value="Remove"/>
£ 50	<input type="button" value="Remove"/>

[Add another](#)



Button position

- Top
- Middle
- Bottom

Show "Choose your own amount" button

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

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.

## Add web campaign

### Donor Premium options

- Capture donor Gift Aid details
- Allow recurring donations
- Offer contact opt-in

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



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.

## Add web campaign

### Thank you screen

Thank you message

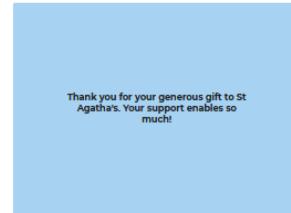
Ir your generous gift to St Agatha's. Your support enables so much!

2 characters remaining

Thank you position

- Top
- Middle
- Bottom
- Offer donation receipt

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



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 Agatha's Online Giving" or "St A's Contactless Xmas Appeal". Please note that your campaign name will be visible to donors in their web browser and on their receipt.

## Add web campaign

### Name your campaign

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

Name

[Cancel](#) [Save](#)

Well done - you have now created your online giving campaign! The next screen summarises all your campaign details. Make sure to click 'Publish' to enable giving through this campaign.

### St Agatha's Online Giving

[Delete](#) [Publish](#)

<b>Template</b>	Basic	
<b>Name</b>	St Agatha's Online Giving	<a href="#">Change</a>
<b>Heading</b>	St Agatha's Anytown	<a href="#">Change</a>
<b>Message</b>	Support the ongoing work of our church in the community	<a href="#">Change</a>
<b>Donation amounts</b>	£5 £10 £20 £50	<a href="#">Change</a>
<b>Show "Choose your own amount" button</b>	Yes	<a href="#">Change</a>



Now that you have published this 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.

## Share 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.

### Web campaigns

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

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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 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.

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'](#).

## How to use Give A Little with Contactless

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.

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.

### Create a contactless campaign

Creating a campaign for contactless gifts is very similar to creating an online giving page; all you need to do differently is select ‘App campaign’ instead of ‘Web campaign’. For further instructions, please refer to pages 7-10 of this guide.

### Load the campaign on your device

Once you have a campaign ready to go, select it on your contactless giving device. You can do this by opening the menu (swipe into the centre of the screen from the left), tapping ‘Campaigns’ and then choosing the campaign you would like to use. When prompted, tap the green ‘Use’ button to confirm your campaign choice.

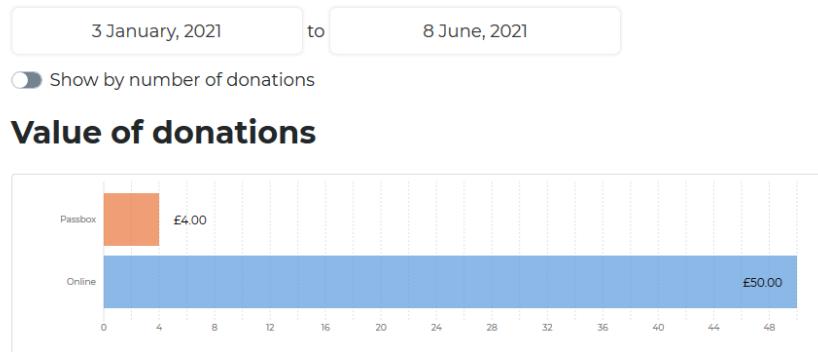
You can also select which campaign is running through the device remotely through the Give A Little portal. In the menu across the top of the screen, click ‘Devices’. From there you can select a device and click ‘Change campaign’.

## How to Access 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
- Payouts (when donations are settled to your account)

### Campaigns



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](https://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](https://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.

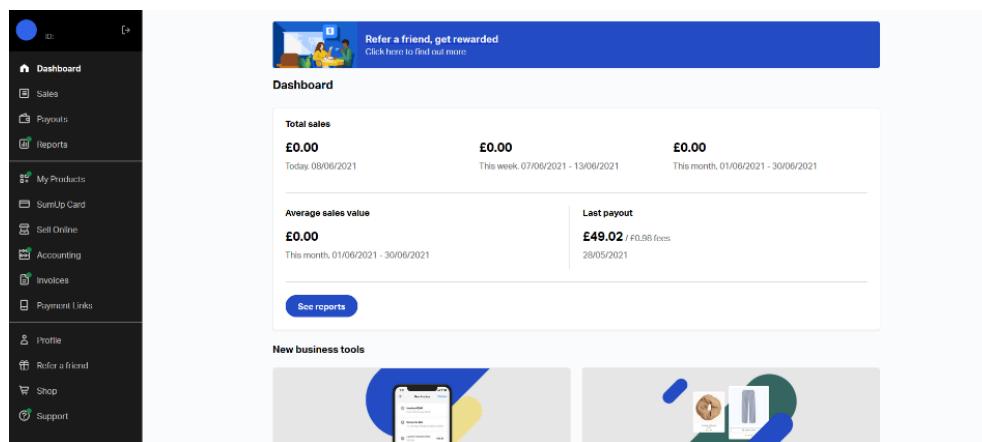
Please practice good data-handling by keeping these reports containing donors' personal details secure. Where appropriate, you could use this information to write a thank you note to those who have given.

## How to Access 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](https://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.

## How to 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 - 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).

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.

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.