

GAL24 – Enabling Contactless donations to be claimed via Gift Aid using the ‘Payter’ Contactless giving device

This guide provides an overview demonstrating how to give a donor access to their own donor record, and how they can enter the details of a recent Contactless donation to link their card details to it. Once this has been completed future Contactless donations will be linked to the Gift Aid declaration on the donor’s record rather than using up your Church’s Gift Aid Small Donations Scheme (GASDS) allowance.

1. How can a donor’s payment details be linked to their donor record?

My Giving Online needs a unique piece of personal identifiable information to identify each donation from a specific donor. To do this it requires the following information:

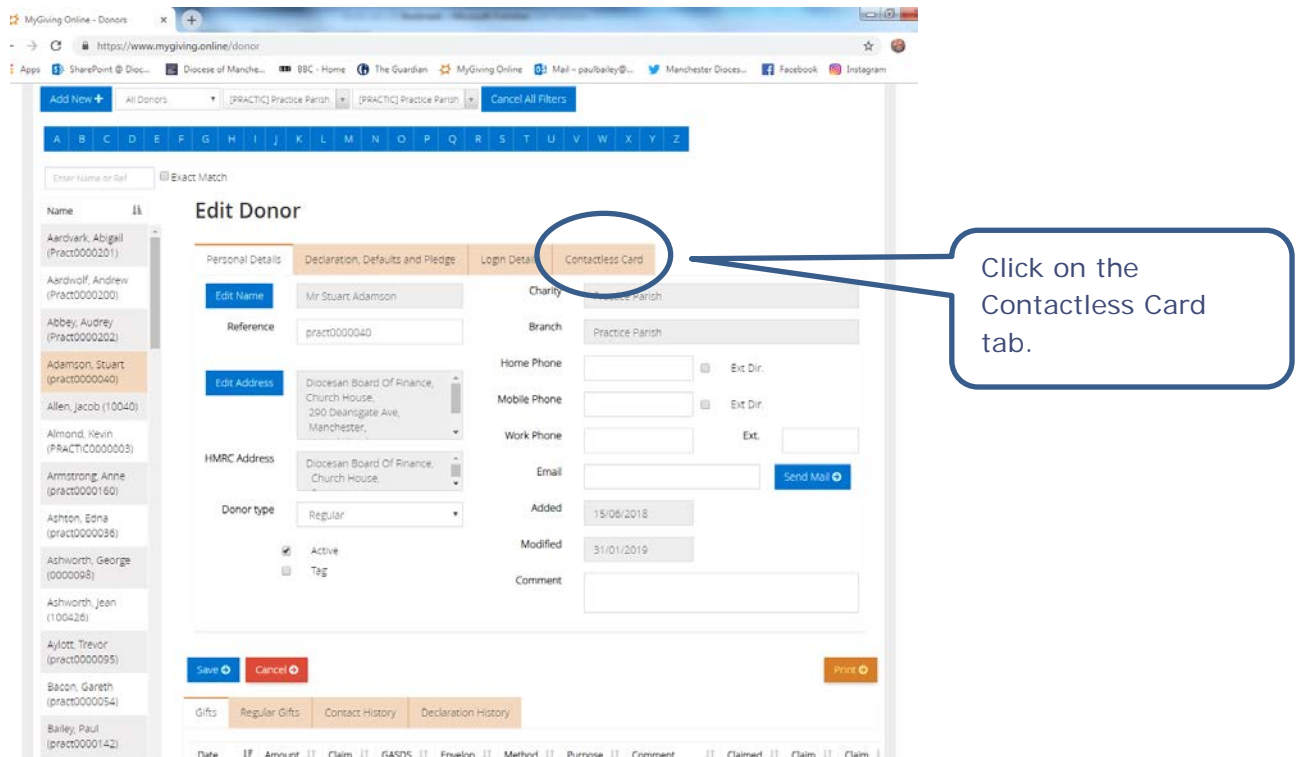
- The last four digits of the donor’s bank card number and a date period when a Contactless donation was made using the Payter device
- or
- A transaction reference from a bank statement

If the donor has used their smart phone or smart watch to make a donation, they should use the card details used in their payment app to identify the donations made using the Contactless device.

How is this achieved in My Giving Online?

- i. Gift Aid Secretary or Treasurer inputting with the donor present

Each donor’s record has a new tab entitled Contactless Card, as shown below:



The screenshot shows the 'Edit Donor' interface in My Giving Online. The 'Contactless Card' tab is highlighted with a blue circle, and a callout box points to it with the text 'Click on the Contactless Card tab.' The page displays a list of donors on the left and a form for editing a donor's details on the right. The form includes sections for Personal Details, Declaration, Defaults and Pledge, Login Details, and Contactless Card. The Contactless Card section is currently empty. The donor's name is 'Mr Stuart Adamson' and the reference is 'pract000040'. The address is 'Diocesan Board Of Finance, Church House, 290 Deansgate Ave, Manchester,'. The donor type is 'Regular' and is active. The page also shows a 'Save' button and a 'Print' button.

The My Giving Online user would then input the information provided by the regular donor into the Contactless Card tab, as shown in the two screenshots below:

Edit Donor

Personal Details | Declaration, Defaults and Pledge | Login Details | Contactless Card

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?

Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Donated Between From To

Last 4 Digits

Search Donation

Type in a date range when a donation was made using the card and the Last 4 Digits of the bank card used. Then click on the Search Donation button.

Edit Donor

Personal Details | Declaration, Defaults and Pledge | Login Details | Contactless Card

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?

Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Transaction Ref.

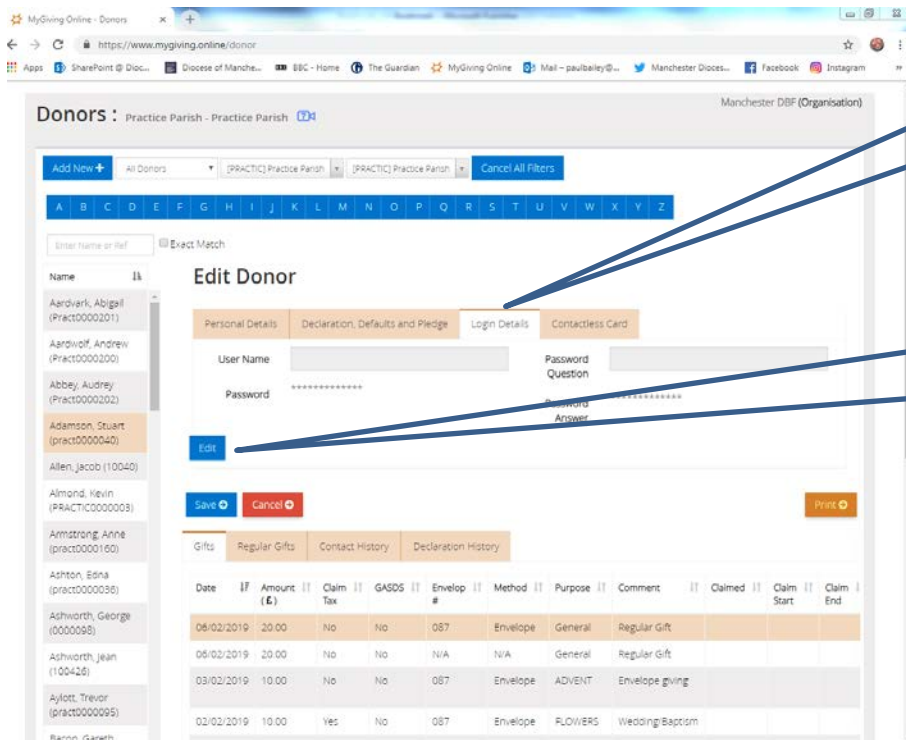
Search Donation

Type in the Transaction Reference number from a bank statement. Then click on the Search Donation button.

After clicking the Search Donation button, a donation or a list of donations will appear matching the search criteria. You'll need to choose one from the list as shown below.

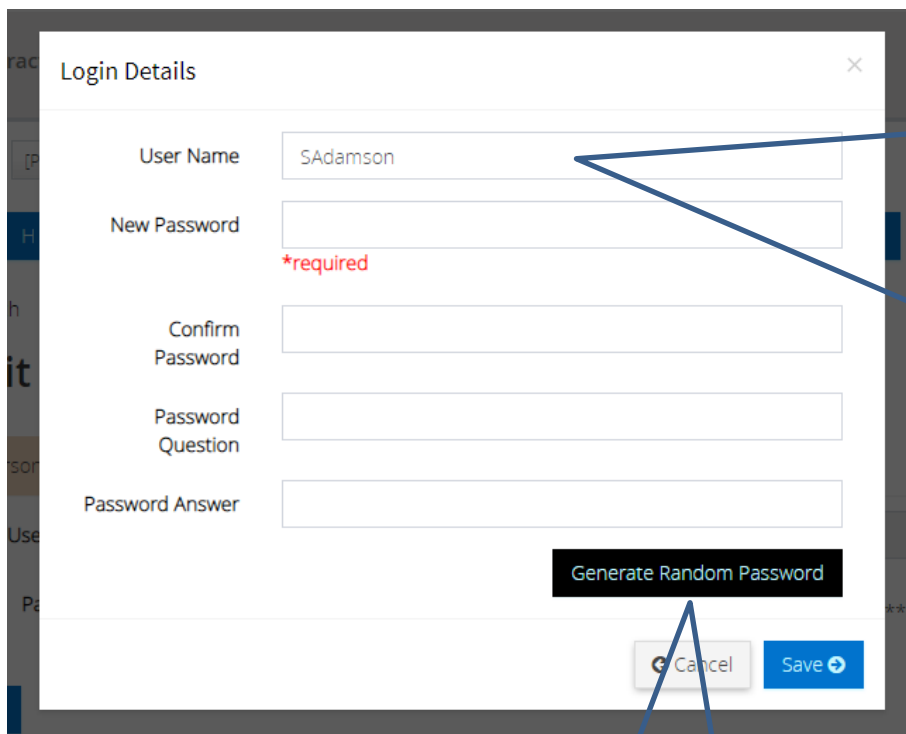
ii. Donor using My Giving Online

A donor will need to be provided in advance with a username and password to allow them to log on to My Giving Online to their own record. This can be provided easily in My Giving Online as shown below:



Click on the Login Details tab in the donor's record.

Then click on the Edit button and the pop up window below will appear.



Type in the person's username in the following format:

First initial (in capitals) and surname (first letter also in capitals), with no space between them. If the username is already in use, try using the first name in full alongside the surname.

Click on Generate Random Password.

Random Password

Password : qUYLzw7JC3

Please make a note of this password as you will not be able to view it later.

CONTINUE CANCEL

If the password is not user friendly (e.g. it contains 0 or o), click on cancel and generate again.

Click on the Continue button.

Login Details

User Name: SAdamson

New Password:

Confirm Password:

Password Question:

Password Answer:

Generate Random Password

Cancel Save

The password will be added into the relevant fields for you.

Type in a password question and answer the donor will know the answer to (e.g. the first name of your Vicar), as shown below.

Login Details

*required

User Name: SAdamson

New Password:

Confirm Password:

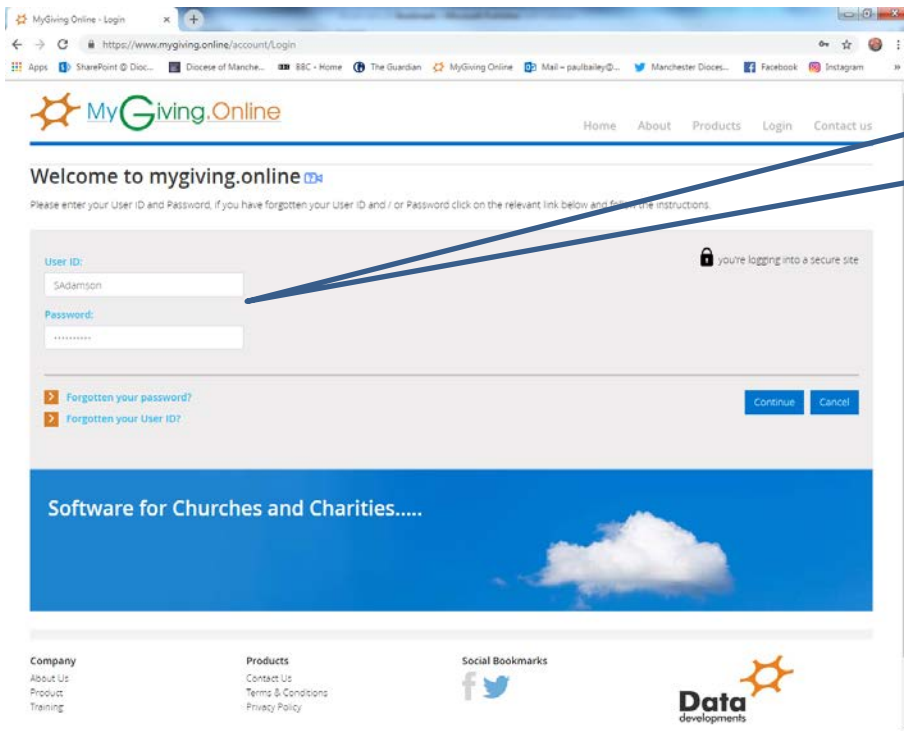
Password Question: What is the first name of your Vicar

Password Answer: Peter

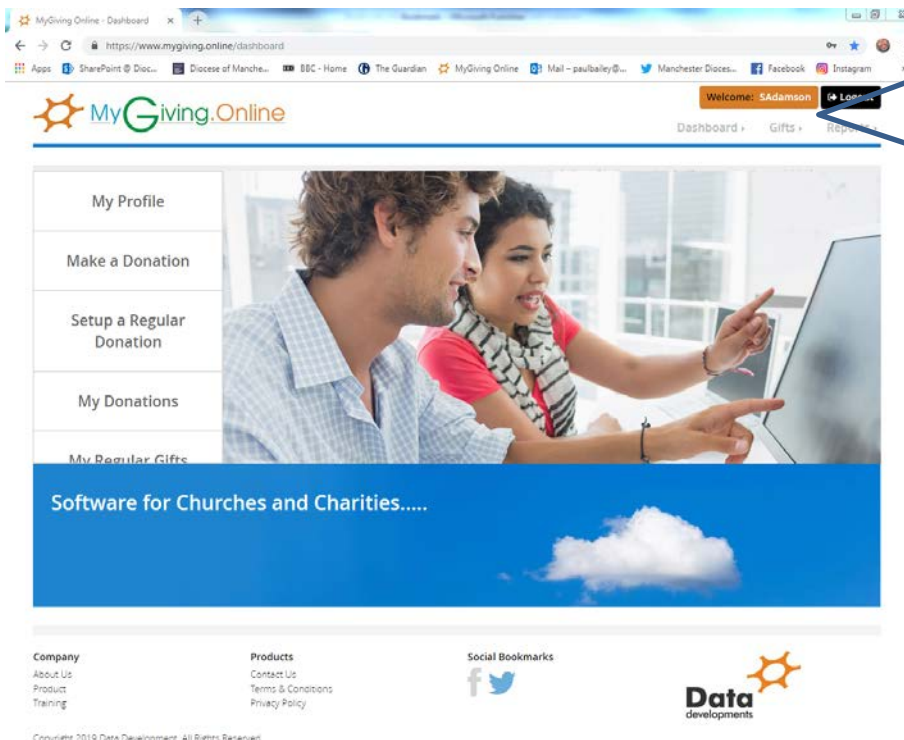
Generate Random Password

Cancel Save

Click on the Save button.




Log out and test the username and password you have just created.



If successful, you'll see their username in the top right corner of the screen. If not, you'll need to repeat the previous steps.

2. Providing a donor with the information they'll need to log on to My Giving Online to see their donor record


An easy way to do this will be to provide each person with a copy of a Gift Aid Lite bookmark containing this information as shown below:



THE CHURCH OF ENGLAND
FOR A GREATER WORLD
Diocese of Manchester

God loves a cheerful giver

2 Corinthians 9:7



GIFT AID Lite



User name: SAdamson Password: qUYLzw7JC3

You can log in via two methods:

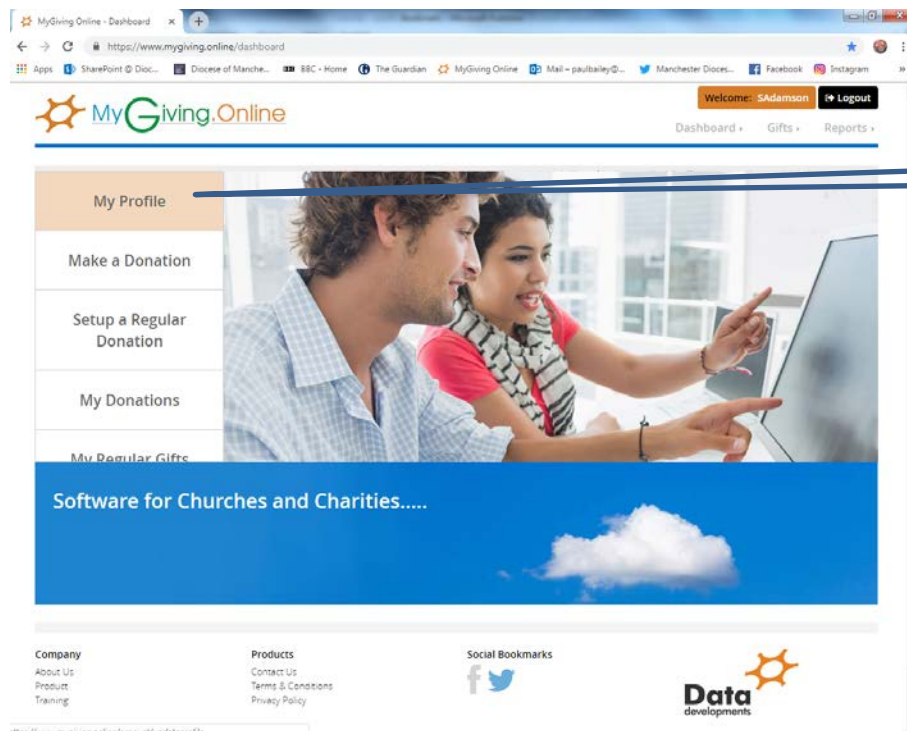
W: www.mygiving.online or using the QR code

My Giving Online app: via Apple's App Store or Google's Play Store

Details on how to link your bank card to your donor record (a one-time only task) are provided separately



An A5 leaflet will also be provided to enable the donor to follow the instructions to add the last 4 digits of their bank card and to identify a Contactless donation made to your Church using it. This process is outlined below:



My Giving Online - Dashboard

https://www.mygiving.online/dashboard

Welcome: SAdamson Logout

Dashboard Gifts Reports

My Profile

Make a Donation

Setup a Regular Donation

My Donations

My Regular Gifts

Software for Churches and Charities.....

Company: About Us, Product, Training

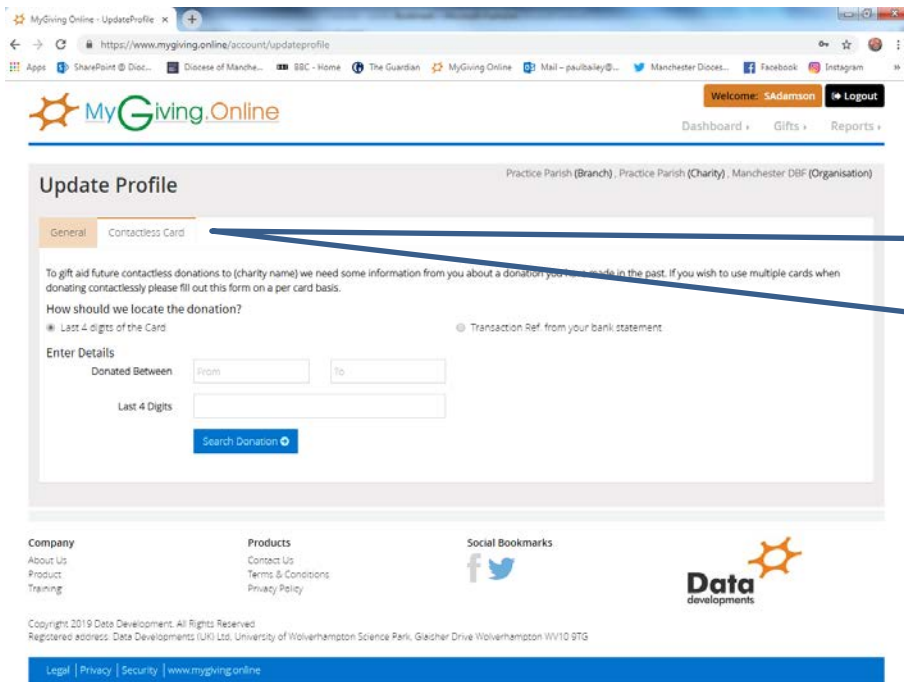
Products: Contact Us, Terms & Conditions, Privacy Policy

Social Bookmarks: Facebook, Twitter

Data developments

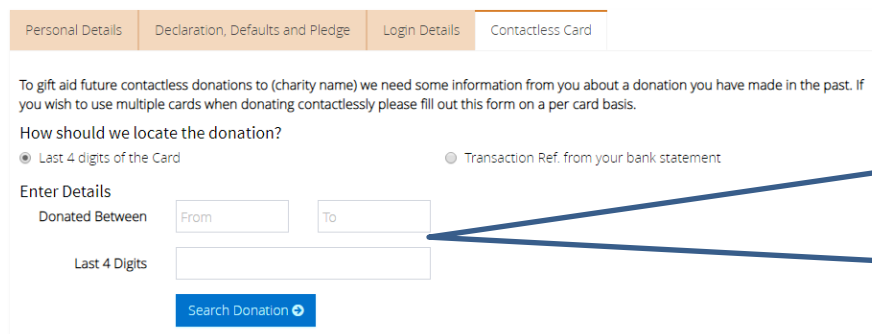
<https://www.mygiving.online/account/updateprofile>

Click on My Profile.



i. Using the last 4 digits of your bank card

Edit Donor



Update Profile Data Developments (Branch) | Data Developments (Charity) | SWD Association (Organisation)

General **Contactless Card**

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?
 Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Donated Between

Last 4 Digits

Select your donation

Approx. Time	Amount	This is my Donation
28/01/2019 11:57	£5	<input checked="" type="checkbox"/>

We would like to be able to send you a thank you and confirmation email for any future donations you are going to make using this card. If you would like to receive this email please enter the preferred email address below:

Email (optional)

Enter the date range and last 4 digits of the cards used and click on the Search Donation button.

It will show a donation (or donations) made using the card number in the date range entered. If nothing appears, try entering a different date range in case you misremembered the date.

Update Profile Data Developments (Branch) | Data Developments (Charity) | SWD Association (Organisation)

General **Contactless Card**

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?
 Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Donated Between

Last 4 Digits

Select your donation

Approx. Time	Amount	This is my Donation
28/01/2019 11:57	£5	<input checked="" type="checkbox"/>

We would like to be able to send you a thank you and confirmation email for any future donations you are going to make using this card. If you would like to receive this email please enter the preferred email address below:

Email (optional)

Tick the box for the entry which matches the donation the donor remembers making.

The donor should enter an (optional) email address and to receive a thank you and confirmation email regarding future donations.

Click on the Save button to store your changes.

ii. Using a transaction reference from your bank statement

Edit Donor

Personal Details | Declaration, Defaults and Pledge | Login Details | Contactless Card

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?

Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Transaction Ref.

Type in the Transaction Reference number from a bank statement. Then click on the Search Donation button.

Data Developments (Branch) | Data Developments (Charity) | SWD Association (Organisation)

Update Profile

General | Contactless Card

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?

Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Transaction Ref.

Confirm your donation

Approx. Time	Amount	Card Number
28/01/2019 11:57	£5	XXXXXXXXXX 0000

We would like to be able to send you a thank you and confirmation email for any future donations you are going to make using this card. If you would like to receive this email please enter the preferred email address below:

Email (optional)

Enter the transaction reference and click on the Search Donation button.

It will show a donation made using the transaction reference.

Data Developments (Branch) | Data Developments (Charity) | SWD Association (Organisation)

Update Profile

General | Contactless Card

To gift aid future contactless donations to (charity name) we need some information from you about a donation you have made in the past. If you wish to use multiple cards when donating contactlessly please fill out this form on a per card basis.

How should we locate the donation?

Last 4 digits of the Card Transaction Ref. from your bank statement

Enter Details

Transaction Ref.

Confirm your donation

Approx. Time	Amount	Card Number
28/01/2019 11:57	£5	XXXXXXXXXX 0000

We would like to be able to send you a thank you and confirmation email for any future donations you are going to make using this card. If you would like to receive this email please enter the preferred email address below:

Email (optional)

Tick the box to confirmation your donation.

The donor should enter an (optional) email address and to receive a thank you and confirmation email regarding future donations.

Click on the Save button to store your changes.