



Pennies Shopify Enablement Guide

**A guide to enabling Pennies on the
Shopify E-Commerce Platform.**

Document Version 2.03

December 2025

Thank you for downloading the free Pennies Shopify Extension. We're excited to welcome you to the micro-donations movement and help you raise vital donations for your nominated charity partners.

WARNING: By installing the Pennies Extension, you will be creating a 'Charity Donation Product' in your system. Please ensure you have read the enablement guide and contacted the Pennies team before proceeding.

Important Information

Pennies is a small charity with limited resources and has some minimum fundraising criteria in place. **Before you are able to proceed with implementation, Pennies will assess how much you could raise, based on transaction numbers.**

To help work out how much you could raise, our e-comm partners typically see a donation added to 10% of their eligible transactions.

Before proceeding with the installation, please contact the Pennies team so they can guide you through the recommended project steps:

product@pennies.org.uk

Contents

Version Control	4
Confidentiality.....	5
Introduction to Pennies	6
How to go live with Pennies: Recommended Project Steps.....	7
How to implement the Pennies Shopify Extension	9
Extension Overview.....	9
Installing The Pennies Extension.....	12
Headless Architecture Setup	12
Implementing a Product Donation	13
Product Donation – Store Considerations	13
API Settings	14
Checkout – Set-up Instructions.....	16
Checkout Installation.....	16
Side Cart – Set-up Instructions	18
Configuration – Frontend styling.....	22
CSS Styling	22
Widget Styling	22
Banner Sizing	24
Pennies API editable text fields	25
Discounts	27
How do I ensure a donation is not discounted?	27
Configure a ‘new’ discount to apply to the ‘Discounts Allowed’ section	28
Testing	29
Going Live	30
Reporting, Reconciliation and Granting	31
Reporting	31
Finance	31
Settlement and Reconciliation.....	31
Operations, Maintenance, and Support.....	33
Failover / Recovery Process	33
Technical support	33
Reviewing the Pennies Extension.....	33

Version Control

Version Control			
Version	Author	Date	Changes
Doc 1.01	RLR NH	Nov 2023	First edition
Doc 2.1	JR	Sep 2024	Addition of: Checkout Extension Update to 'Cart' Theme Extension Discounts handling Updating screenshots Reformatting
Doc 2.2	JR	Oct 2024	Added going Live Section Expanded installing section Expanded discounts section
Doc 2.3	DT	Oct 2025	Widget Styling Express Pay Styling Options Mock-up

Confidentiality

Non-disclosure statement

The content of this document (content being images and text) is copyright © The Pennies Foundation (registered in England no. 064189820) and a charity (registered with the Charity Commission for England and Wales charity no. 1122489).

All rights are expressly reserved, and you agree to abide by all copyright notices and restrictions attached to the content and not to remove or alter any such notice or restriction. You may not copy, modify or distribute any part of the content for any purpose. Any use of this content, including copying or storing it in whole or part, other than for the purpose set out below is prohibited without our permission.

Purpose

We have supplied you with one copy of the Pennies Enablement Guide - Shopify for the purpose of evaluating the Pennies technical implementation.

Confidentiality

The content of this High-Level Systems Overview is confidential, and you must not:

- Make it available in any form whatsoever to any person other than to those of your employees who have a need to know;
- Use or disclose it to a third party;
- Make any use of it for your own benefit or the benefit of any third party; or
- Use or reproduce it without our written consent.


Jurisdiction


These terms and conditions shall be governed and construed in accordance with the laws of England and Wales and any disputes arising hereunder shall be subject to the exclusive jurisdiction of the Courts of England and Wales.


Introduction to Pennies

Pennies is the leading UK charity working to enable, protect and grow micro-donations. We partner with businesses to support charities in need, offering people the chance to add a donation to their purchase when they pay digitally. In 14 years, we've unlocked 230 million micro-donations and counting for 1,000+ charities. We make giving simple, every day.

Pennies makes it easy for businesses to give their customers the option to donate to charity. The Pennies extension integrates simply into the checkout process, allowing customers to add a small donation to their purchase.

 Donations are automatically reported to Pennies and granted to the merchant's chosen charity. Automated reconciliation and reporting allows for a simple settlement process, ensuring donations reach the nominated charity quickly.

 In an increasingly cashless society, Pennies' micro-donation solutions give customers paying by card or digital wallet a simple, affordable, and data-free way to add a small donation to their purchase – in-store, online and in-app. 100% of funds raised going to charity.

 Pennies is also the leading voice on micro-donations, championing affordable, feel-good giving for charity. We help businesses build purpose into the heart of what they do and have created a movement that is working together to build a legacy of digital giving. Because micro-donations matter.

How to go live with Pennies: Recommended Project Steps

1. Contact the Pennies team: product@pennies.org.uk

- With 14 years' experience and 150+ live brands, the Pennies team are on hand to offer their free expertise and impartial advice, and to help you raise as much as possible for your charity partners.
- Your dedicated Pennies Partnership Manager will support you through every step of the process, to ensure you can start collecting donations as quickly as possible.
- In one quick 30 minute phone call, they will ask a few simple questions to better understand your business, e-comm architecture, ESG strategy and charity partnerships – and give you a tailored plan for going live with Pennies.

2. Continue with the implementation

- After speaking with the Pennies team, please continue following the steps in this enablement guide to install the extension.
- Speak to the Pennies team about testing and test credentials.
- The Pennies team are on hand to answer any questions you have throughout the process. They can even host roundtables with your Developers and Finance Teams to ensure everyone is happy with the end-to-end process for reconciling donations.
- **Please note – you won't be able to go live and start collecting donations until Pennies gives you live credentials.** You will only receive these once the following project steps have been completed

3. Finance, governance and due diligence

Before going live with Pennies, you will need to do the following:

- **Sign an NDA:** This is to protect both parties and allow you to feel comfortable sharing commercial information like transaction and conversion data.
- **Sign a Fundraising Agency Agreement (FAA):** The FAA is an agreement to establish the money flows for the donations and our relationship going forward. It also sets out various legal protections for both Pennies and the merchant and ensures we are all operating within UK&I charitable laws and regulations.
- **Nominate a Finance Lead:** We recommend having a 'sponsor' in the Finance Team to own the Pennies partnership, and to be involved in the implementation so they understand the end-to-end process. Pennies also needs a named contact to send donation settlement requests to.
- **Nominate a Charity Partner:** You need to nominate the charity(ies) you wish to collect donations for. Pennies carries out due diligence on the charity on your behalf and has a short onboarding process which charities must complete before being supported. This helps ensure we have their correct information for grant payments, branding and impact statements.

4. Partnership Success

- The Pennies Marketing & Charities Team are on hand to support with any launch and customer engagement plans you have. They can also share best practice recommendations from 14 years' experience working with 150+ high street and e-commerce brands.

5. Testing and go live

- Pennies will help you test your new donation function before going live, to confirm that there are no adverse impacts on your conversion rate or site render speed. Pennies like to offer AB testing to help you find what donation settings are most effective.

How to implement the Pennies Shopify Extension

Important:

You will not be able to proceed with the installation until Pennies provide you with access credentials to our system. These will have been provided with you along with this guide.

By installing the Pennies Extension, you will be creating a 'Charity Donation Product' in your system. Please read the enablement guide and contact the Pennies team before proceeding to ensure the backend 'tagging and fulfilment' setting is implemented correctly.

Extension Overview

The Pennies Shopify Extension allows Shopify Plus customers to add our extension to their checkout process, as an easy-to-add widget. If you are a free Shopify member, you can only add our extension to the side cart. The Pennies Shopify extension allows retailers to give their customers the option to donate to charity, by simply rounding up or topping up their order.

Once installed, the extension makes micro-donations easy:

- All the wording, charity information and donation amount comes from Pennies. Once you nominate your charity and decide on your donation proposition – Pennies will provide you with a unique Pennies ID and Access token, which you configure in the dashboard.
- If you ever want to change charity or try a different donation amount – it's easy. Pennies updates your credentials, and all the new information is pulled through. This means no extra development work if you ever want to make changes.
- The extension also makes reporting, reconciling, and granting donations easy:
- The donation is added to the customer's basket, and is settled into the retailer's bank account in one payment and authorisation
- In the Pennies Extension, you have a report of all donations made
- The extension also reports to Pennies every time a donation is made. We don't receive any customer data or card details – just donation data: time, date and amount
- We then use these reports to settle the donations with the retailer on a monthly basis
- The donations are then settled to Pennies, and we grant them out on your behalf. 100% of donations go to charity, 90% to your nominated charity and 10% to Pennies. Pennies is also a charity, registered in England and Wales (charity no. 1122489) and Ireland (charity no. 20106331).
- Where the Extension is not suitable - The Shopify Checkout is locked down and therefore direct API integration is only possible at the basket.

Pennies Extension in the Shopify Plus Checkout Display?

Payment

All transactions are secure and encrypted.

Credit card B

Card number *** 🔒

Expiration date (MM / YY) Security code ?

Name on card
Bob Bobson ×

Use shipping address as billing address


Your support will help TEST Charity
Foundation do amazing things!

Donate 25p

Every penny you give goes to charity: 90% to the TEST Charity
Foundation (Registered Charity No 9999906) and 10% to
Pennies (registered charity no. 1122489).



Pay now

 ¹ The Collection Snowboard: Liquid £749.95

Discount code or gift card Apply

Subtotal £749.95

Shipping FREE

Total GBP **£749.95**

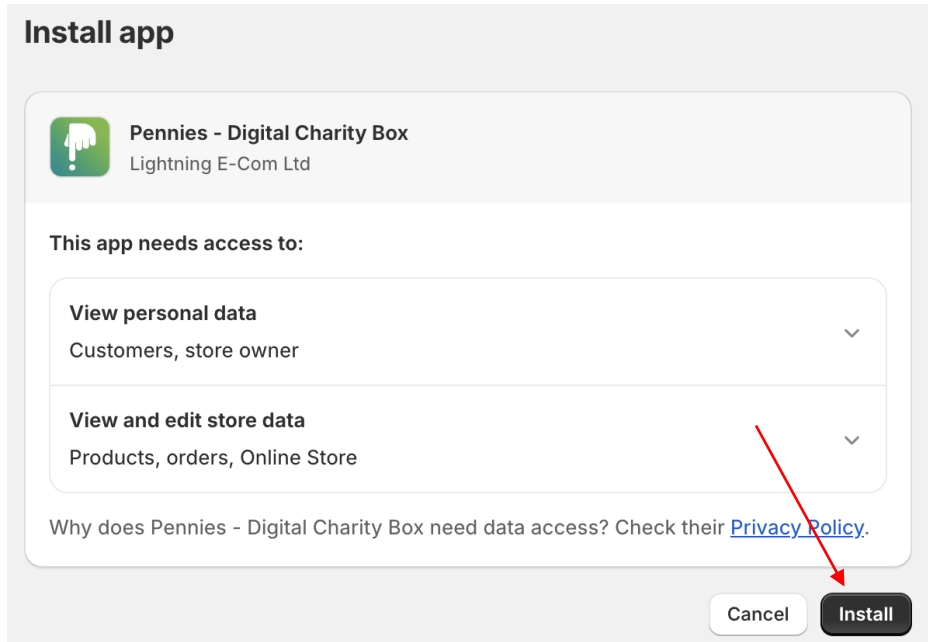
Features

- Easy to toggle the integration on and off in your checkout and cart.
- All content visible in the frontend of the extension is pulled from unique credentials (Pennies ID and Access Token). So, it's easy to change charity, wording, and donation proposition – just ask Pennies to update your credentials.
- Multiple donation propositions to choose from:
 - **Round up:** Rounds the customer's order up to the nearest £1
 - **Top up:** The same fixed value donation every time, i.e. £0.25 / £0.50 / £1
 - **Flexi:** Combination of the above two features. Will round up, unless it is an already round number, then it will add a fixed value donation
 - **Banding:** Donation size is proportionate to basket size – i.e. donation will increase as basket size increases. You control the logic i.e.
 - Order under £5 – no donation
 - £5 - £25 = £0.25
 - £25 - £50 = £0.50
 - £50+ = £1
 - **Multiple Choice:** Provide multiple donation amounts for customers to select from
- 'Collapsible Widget Feature' (side cart only). This means the widget can expand to reveal more information, ensuring it doesn't take up too much space in the side cart.

- Simple to use styling dashboard – can change colour, font and sizes without any coding or development
- Compatible with GBP.
- Works with the Shopify Multi-Currency feature. The donation is converted into the shown currency in the basket. This is then converted back into GBP and reported back to Pennies in GBP. Please speak to Pennies if you do use this feature as a slightly different solicitation is required.
- Pre-enabled test configurations, making it easy to test different donation propositions. **(Please ensure you only test in Test environment – any testing in Live will be recorded as actual donations)**
- Donation is added to customer's basket and order value, without being added to Shopify's revenue model.
- Pennies doesn't create an additional step in the customer journey. It can be completely ignored. The customer must actively choose to donate but can ignore it and still complete the journey.
- No data security concerns – Pennies only holds data about the donation (see reports at end of this document). No information about the customer, the payment and the order (other than the order number) are recorded, visible to the extension or sent to Pennies. Therefore, PCI and data protection rules are not relevant for this extension.

Installing The Pennies Extension

After visiting our App Listing and choosing to install our extension you will be taken to the below page. Click on **Install** to proceed.



Enter in **Merchant ID** and **Access Token** that Pennies gave to you and click on **Validate**. After you have completed the above steps, please go to Implementing a Product Donation (See Below).

Note: This **Merchant ID** and **Access Token** is also your credentials for your **live** site so take great care when testing always ensure you are test when modifying the extension.

Please enter your Pennies Merchant ID and Access Token here, then click "validate"

Merchant ID

Access Token

Headless Architecture Setup

If your store uses a headless commerce architecture, you can still offer Pennies micro-donations.

- **Checkout Widget:** No changes are required as long as your store uses Shopify's native checkout (which most merchants do).

- **Main Site Widget (Sidecart or Cart Page):** Integration depends on how your headless build handles the shopping cart:
 - If your site still uses Shopify's basket/cart, minimal changes are needed.
 - If your site uses a custom basket/cart, we'll need to work with your developers to ensure compatibility.

Please contact the Pennies Product Team before implementation. We will review your headless setup, confirm requirements, and provide integration guidance to ensure your solution remains compliant.

Implementing a Product Donation

To add the Pennies extension successfully you must first select the 'Donation Type'. This should be automatically selected by default but if not please select it. To select the donation type, simply click on the '**Product Donation**' tab and click '**Save**'.

Please follow the below steps to install the Pennies extension on your site.

Note: The Tip Donations feature is now deprecated and replaced with the new checkout extension. Do not select this option.

Donation Type

Product Donation

Create a donation product with price variants that users can add to their cart.

[Save](#)

Tip Donations

Round basket totals to the nearest whole for example to allow users to donate differing amounts.

Product Donation – Store Considerations

When using the '**Product Donation**' type, a product will be created. This will mean that the donation product will be visible on the collection page, search, recommendations and so on.

The product is tagged with '**charity-donation:true.**' in both **Live** and **Test**. If you want to hide it from your store page, you will need to update your collection rules, merchandising rules. To do this you can install an app that hides this from your store page (if using a search and filter app) to ensure you don't show the product on these pages.

Shopify does not automatically fulfil nonphysical products if you would like it to be you can either do this manually or install an app to do so. Leaving the donation unfulfilled has no effect on donations processing

We suggest that you get guidance from your Shopify expert for any Apps you may want to install to support the steps above.

Please note that a donation is not refundable, is not taxable and is not to be included in turnover or profits.

API Settings

Your **Merchant ID** and **Access Token** will be provided by Pennies. This gives you access to our **Test** accounts in the **Test** environment, and these credentials will also be what you use for the **Live** environment.

Care: Ensure you are in the correct environment when testing the Pennies Extension.

Pennies Settings

API Settings

Integration Type

Live Test

Merchant ID

10001721

Access Token

ZX=4B6

round up, single charity

25p top-up, single charity

50p top-up, two charities

round up, single charity

round up, single charity, £5 floor limit

flexi, single charity

additional amounts

Save

In the Test environment you can test different types of donations by selecting from the drop-down menu. The Pennies Business Partner Manager will help guide you to which one will maximise the donation income for the charity for your business.

Note:

- **Sandbox** - In the Sandbox, you can switch between donation methods freely to test the different donation propositions (explained above in the Features section). When you switch test accounts donation proposition will change. The charity name will update to display the chosen donation method (e.g. switching from roundup to 25p will display 25p Charity) so it is clear what you are testing. The logo will remain the same by default.
- **Production Credentials – Care** When you receive a Production Pennies ID, it is specifically set up for the donation method and charity that you have requested for your live site and confirmed in the Charity Proposition form. If you want to switch to a different donation method or charity, you will need to request this from Pennies at product@pennies.org.uk

Donation Product Settings

These settings show you the donation product that has been created for customers to add to basket. The only thing you can change is the status between **Active** and **Draft**, the rest of these settings are set by Pennies and will not be editable by yourself.

If you want something changed contact Pennies at product@pennies.org.uk

Donation Product Settings

Product ID : [7427479109683](#)

Status

Active

Title

Pennies Donation

Handle

pennies-9999906

Description

<p>Your support will help Black TEST Charity do amazing things</p>
<p>Every penny you give goes to charity: 90% to the Test BLACK Charity (Registered Charity No 9999905) and 10% to Pennies (registered charity no.

Refresh

Checkout – Set-up Instructions

The Pennies Shopify extension has two options: the checkout extension or the cart extension. If you wish, you can implement it in both areas, but this would require two separate implementations.

In most cases, Pennies strongly advises retailers to implement the checkout extension.

During our 14 years' experience across 150+ live brands, we've seen the best customer engagement and donation conversion when the donation request is the final decision the customer makes before paying. Placing the donation option as the final step in the Shopify checkout is ideal, and using the checkout extension is the best way to raise significant funds for your charity partner.

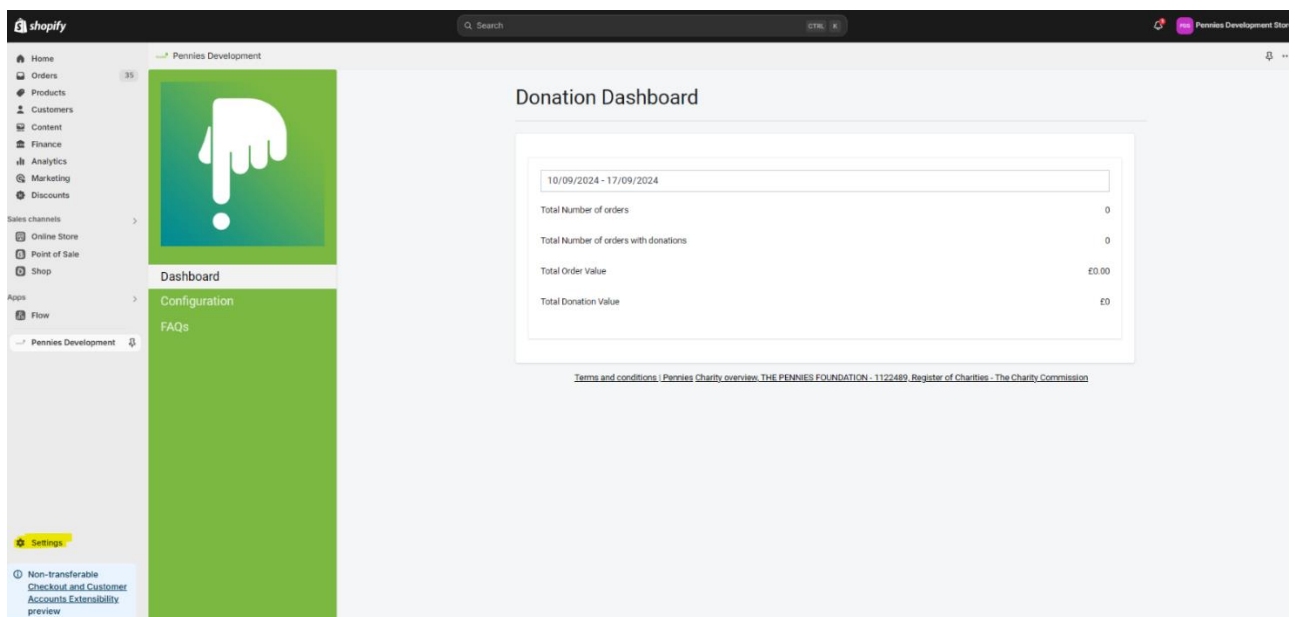
We only recommend the cart extension if your customers have to click through a cart summary page before reaching the checkout. Otherwise, the risk is customers will completely miss the opportunity to donate. For example, mobile customers with multiple products in the side cart would need to scroll to the bottom of the side cart to see the donation option.

Checkout Installation

To enable the Pennies donation extension on the checkout please follow these steps:

Note: When following the below steps make sure that the Pennies Extension is in **'Test'** as if it is in **Live** this will instantly push the Pennies Extension onto your **Live** site.

1) In the Shopify Admin view, click **'Settings'** on the bottom left of the side bar.

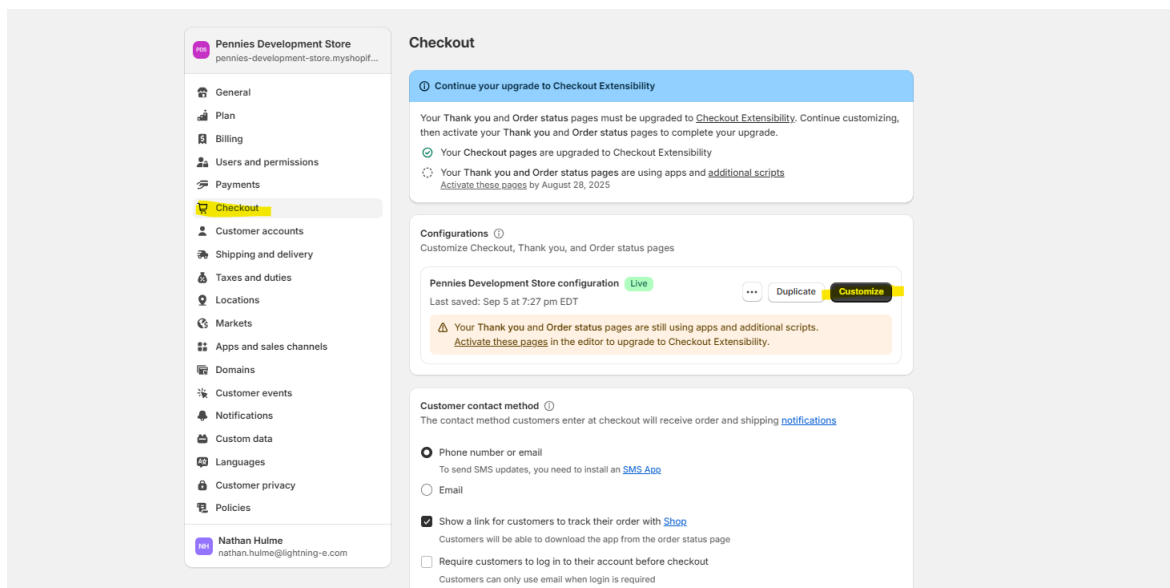


The screenshot shows the Shopify Admin interface for a store named 'Pennies Development'. The left sidebar contains navigation options such as Home, Orders, Products, Customers, Content, Finance, Analytics, Marketing, Discounts, Sales channels, Online Store, Point of Sale, Shop, Apps, Flow, and Settings. The 'Settings' option is highlighted. The main content area displays the 'Donation Dashboard' for the period 10/09/2024 - 17/09/2024. The dashboard includes a table with the following data:

Metric	Value
Total Number of orders	0
Total Number of orders with donations	0
Total Order Value	£0.00
Total Donation Value	£0

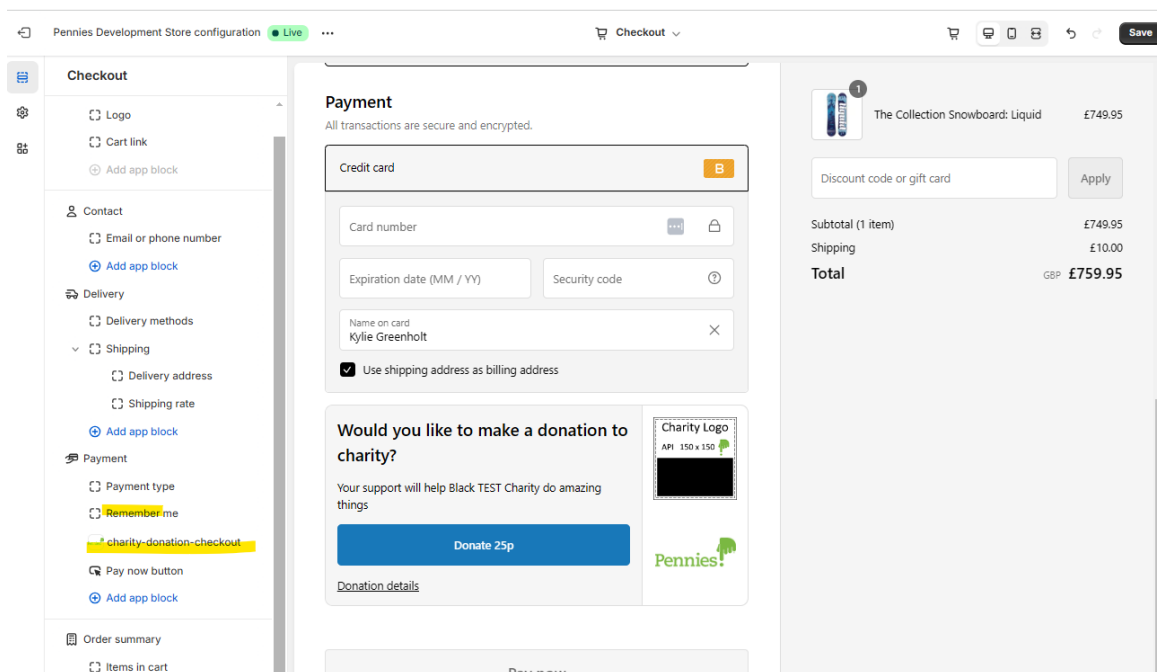
At the bottom of the dashboard, there is a link for 'Terms and conditions | Pennies Charity overview, THE PENNIES FOUNDATION - 1122489 Register of Charities - The Charity Commission'.

2) Click **'Checkout'** and then click **'Customise'** on the theme you wish to add the donation widget to.



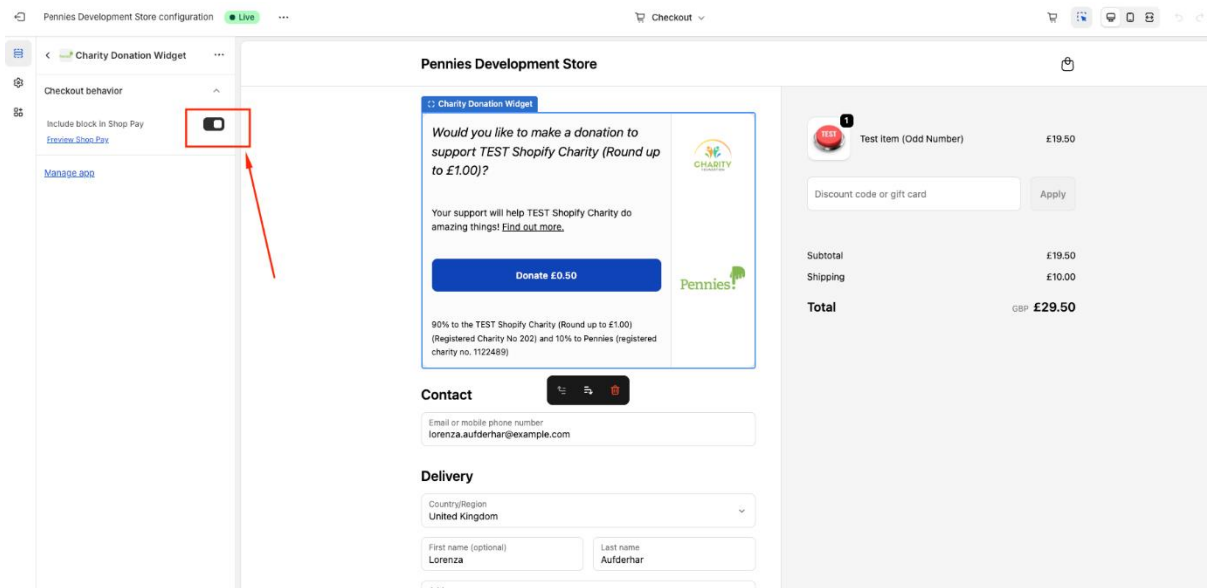
3) Click **'Add app block'** and select the **'Pennies donation widget'**. This may be shown as Charity Donation Widget or charity-donation-checkout

For the best donation conversion, we recommend placing this app block under the **'payment'** section, and below **'Remember me'**



4) We recommend **enabling Pennies in the Shop Pay user journey** as well so that you can capture as many user donations as possible. To do this,

- i. Click on the Pennies Block > Checkout Behaviour
- ii. Toggle the switch that says "Include in Shop Pay"



5) Finally, click **'Save'**.

If you've added the widget to an offline checkout theme, you'll need to publish for the widget to be visible to customers. After you've done all these steps, please go to the styling section.

Side Cart – Set-up Instructions

As mentioned above, in the majority of cases our guidance is to implement the checkout extension, as we've seen the best customer engagement and donation conversion when the donation request is the final decision the customer makes before paying.

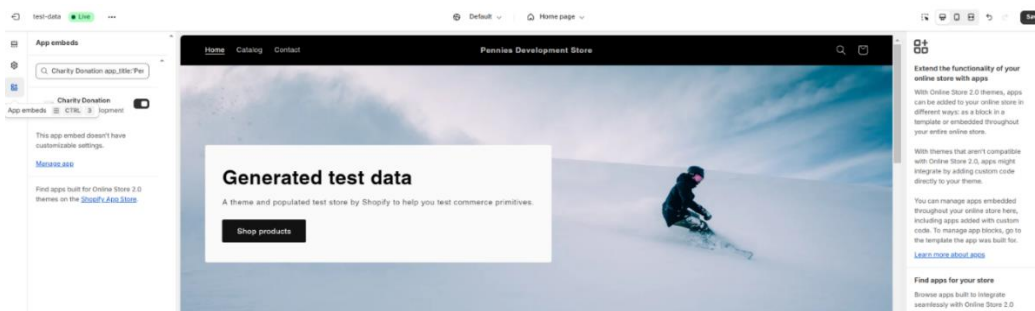
We would only recommend the cart option if your customers have to click through a cart summary page before reaching the checkout – like in the image below. Otherwise, the risk is customers will completely miss the opportunity to donate. For example, mobile customers with multiple products in the side cart would need to scroll to the bottom of the side cart to see the donation option.

Please follows the steps below to install in the side cart.

Note: When following the below steps make sure that the Pennies Extension is in **'Test'** as if it is in **Live** this will instantly push the Pennies Extension onto your **Live** site.

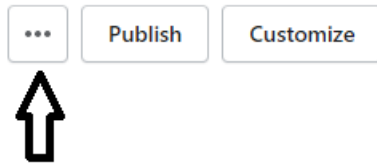
1) In the App dashboard under **'Installation'**, click the **'Add Charity Donation Embed Block'** button.

This will take you to the live theme's App embed settings, with the Charity Donation App embed block turned on.

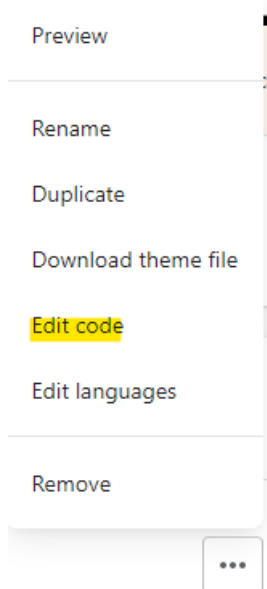


From here simply click **'Save'**.

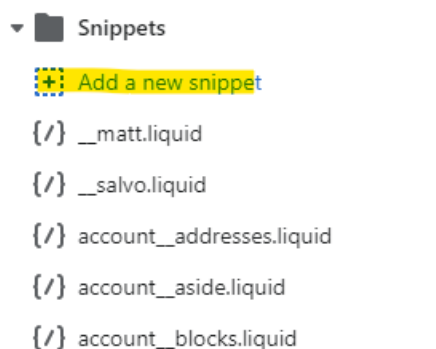
2) In the Shopify Admin view, find the theme you wish to edit and click the 3 dots.



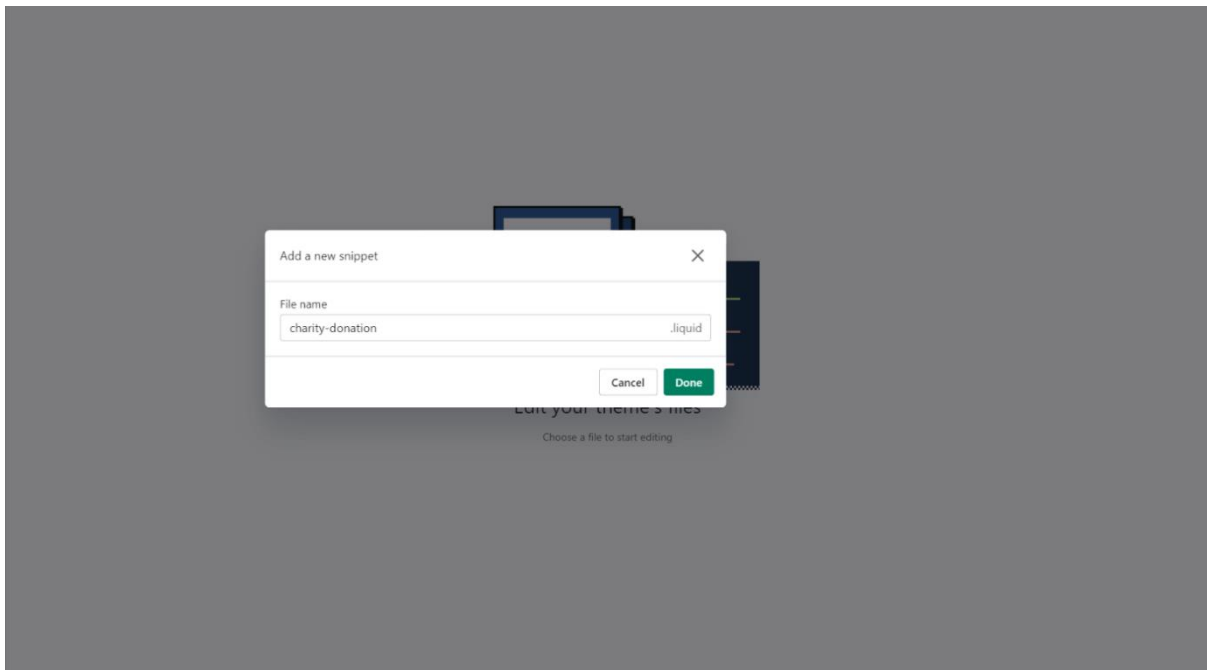
3) Click Edit Code.



4) Scroll down to **'Snippets'**, open and click **'Add a new snippet'**.

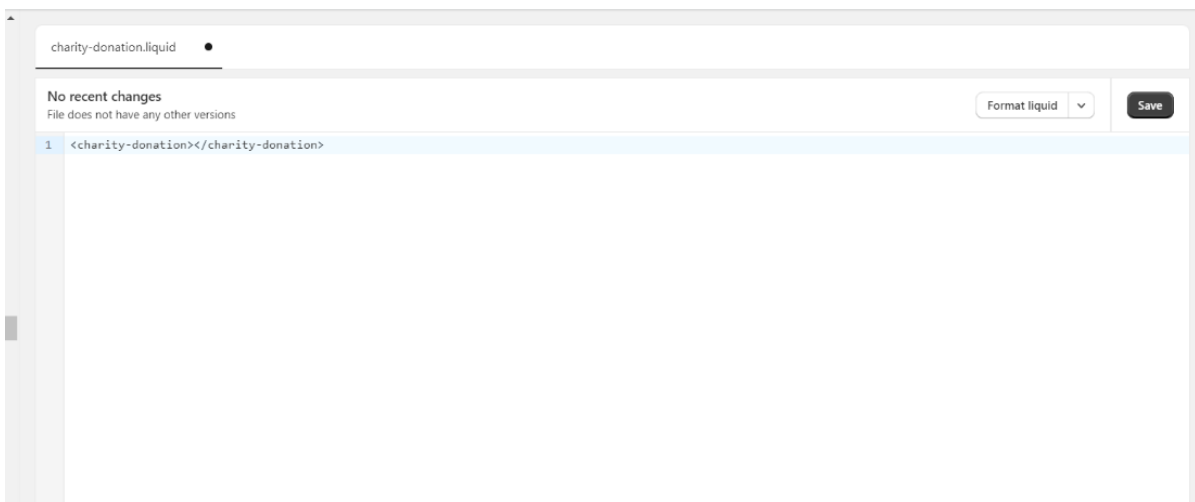


5) Name the file '**charity-donation**' and click '**Done**'.



6) In this snippet, paste the following code and click '**Save**'.

<charity-donation></charity-donation>



7) Find the section where your cart markup is. This name could vary depending on previous dev work completed and the theme you chose, but commonly it's **cart-template** or **template-cart**.

Once you've found your section find the code where you would like the Pennies widget to appear. In this example we'll add the widget above the checkout button. You may wish to contact a developer if you're not comfortable with editing HTML.

Paste the following:

{% render 'charity-donation' %}

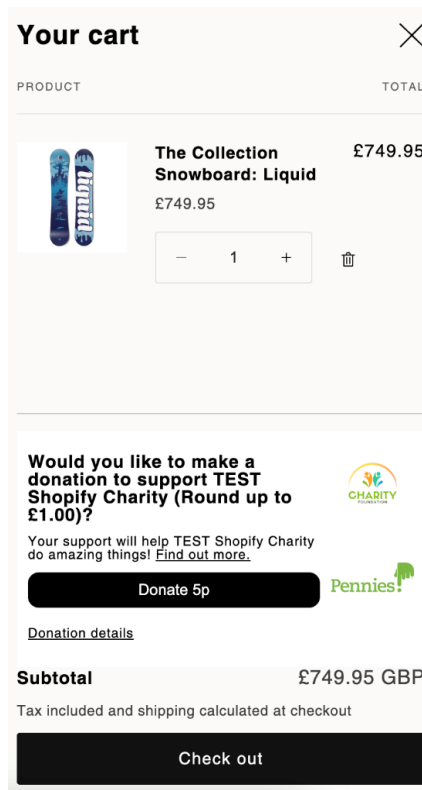
Note: This line of code can be placed anywhere on your site. If you have a side cart, popup cart etc you need to follow step 6. As well as adding to your cart page, add this to the section where your side/popup cart runs.

8) After adding the line of code, press **'Save'**.

```

266 {% if cart.taxes_included and shop.shipping_policy.body != blank %}
267   {{ 'cart.general.taxes_included_and_shipping_policy_html' | t: link: shop.shipping_policy.url }}
268 {% elsif cart.taxes_included %}
269   {{ 'cart.general.taxes_included_but_shipping_at_checkout' | t }}
270 {% elsif shop.shipping_policy.body != blank %}
271   {{ 'cart.general.taxes_and_shipping_policy_at_checkout_html' | t: link: shop.shipping_policy.url }}
272 {% else %}
273   {{ 'cart.general.taxes_and_shipping_at_checkout' | t }}
274 {% endif %}
275 {% endcapture %}
276 <div class="cart_shipping_rta">{{ taxes_shipping_checkout }}</div>
277
278
279
280 <div class="cart_buttons-container">
281   <div class="cart_submit-controls">
282     {% unless section.settings.cart_ajax_enable %}
283     <input type="submit" name="update"
284       class="cart_submit btn btn--secondary"
285       value="{{ 'cart.general.update' | t }}">
286     {% endunless %}
287     <input type="submit" name="checkout"
288       class="cart_submit btn btn--small-wide"
289       value="{{ 'cart.general.checkout' | t }}">
290   </div>
291
292   {% render 'charity-donation' %}
293
294   <div class="cart_error-message-wrapper hide" role="alert" data-cart-error-message-wrapper>
295     <span class="visually-hidden">{{ 'general.accessibility.error' | t }} </span>
296     {% include 'icon-error' %}
297     <span class="cart_error-message" data-cart-error-message></span>
298   </div>
299
300   {% if additional_checkout_buttons %}
301     <div class="additional-checkout-buttons">{{ content_for_additional_checkout_buttons }}</div>
302   {% endif %}
303 </div>
  
```

9) Finally, preview your theme and make sure that you're happy the widget renders correctly. During test mode, only the test charities will show.



Example of the Pennies Side Cart

Configuration – Frontend styling

We understand that the default styling might not match your brand guidelines. The styling of the Extension can be edited in two ways either the CSS or within Pennies Extension itself using the in-built editor.

CSS Styling

You can edit the colour, font, the size of text, backgrounds and how elements are positioned and laid out. To add custom styling, you may want to contact a developer or someone who is competent with CSS.

Important – If do make changes using CSS Styling, you must contact Pennies for guidance and to arrange testing to ensure it still meets our requirements and the legal wording is clear and legible.

Widget Styling

We know that customer CSS styling might not be an option for some, so our dashboard comes fully equipped with settings to allow you to control the look and feel of the widget and make it align to your site.

You can find settings to control the following:

- Background colours
- Text size
- Alignment of legal text and images
- Make the widget collapsible to take up less room (side cart only)
- Logo sizes

There are 4 different widget styles that can be styled:

1. **Main Site Widget (desktop)** – This is the widget that is used on other placements on your site such as the side cart, cart page. This adjusts the desktop view.
2. **Main Site Widget (mobile)** – This is the widget that is used on other placements on your site such as the side cart, cart page. This adjusts the mobile view.
3. **Checkout Widget (desktop)** - The checkout page operates independently from the rest of the site, and therefore, has its own styling. This instance adjusts the desktop view.
4. **Checkout Widget (mobile)** - The checkout page operates independently from the rest of the site, and therefore, has its own styling. This instance adjusts the mobile view.

Widget Styling


Main Site Widget (desktop)	Main Site Widget (mobile)	Checkout Widget (desktop)	Checkout Widget (mobile)
Widget Styling (desktop)			
Widget Background Colour	<input type="text"/>	Widget Text Colour	<input type="text"/>
Widget Padding(px)	<input type="text" value="20px"/>	Widget Margin(px)	<input type="text" value="20px"/>
Soundbite Padding(px)	<input type="text" value="0px"/>		
Widget Title Styling			
Widget Title Styling(px)	<input type="text" value="16px"/>		
Button Styling			
Button Background Colour	<input type="text"/>	Button Text Colour	<input type="text"/>
Button border radius(px)	<input type="text" value="10px"/>	Button text font size(px)	<input type="text" value="14px"/>
Charity Images and Legal Text			
Legal text font size(px)	<input type="text"/>	Text and donation button alignment	<input type="text"/>

Simply choose your preferences and select **'Save'**.

Banner Sizing

Majority of our merchants use the default styling options, and it has shown to have no negative impact on site conversion. However, it is possible to reduce the overall size of the Pennies banner if you would like it smaller, by adjusting the styling of the banner, putting all the presets to the smallest options. Reducing the text in the soundbite and title also reduces the overall size of the banner.

Default Banner Size:



Pennies Development Store 

Would you like to make a donation to support TEST Shopify Charity (Top up 25p)?

Your support will help TEST Shopify Charity do amazing things! [Find out more.](#)

Donate £0.25

Every penny you give goes to charity: 90% to the TEST Shopify Charity (Top up 25p) (Registered Charity No 201) and 10% to Pennies (registered charity no. 1122489)




Contact

Email or mobile phone number
claud.balistreri@example.com

Delivery

Country/Region
United Kingdom

**TEST** Test item (Odd Number) £19.50


Discount code or gift card **Apply**

Subtotal £19.50

Shipping £10.00

Total GBP **£29.50**

Smallest Banner Size:



Pennies Development Store 

Would you like to make a donation to support TEST Shopify Charity (Top up 25p)?

Your support will help TEST Shopify Charity do amazing things! [Find out more.](#)

Donate £0.25

Every penny you give goes to charity: 90% to the TEST Shopify Charity (Top up 25p) (Registered Charity No 201) and 10% to Pennies (registered charity no. 1122489)




Contact

Email or mobile phone number
claud.balistreri@example.com

Delivery

Country/Region
United Kingdom

**TEST** Test item (Odd Number) £19.50

Discount code or gift card **Apply**

Subtotal £19.50

Shipping £10.00

Total GBP **£29.50**

Pennies API editable text fields

The Extension is formatted for you. As above if required, you can, using the stylesheets, alter the appearance to make it fit your sites look and feel.

Pennies configure the following fields which populate the Extension.

Donation panel

The API fields in the donation panel that can be edited by Pennies are:

- **<heading>** Would you like to make a charitable donation?
- **<soundbite_message>** The TEST Charity does amazing things. **If this isn't populated the URL won't show**
- **<url>** <https://www.testcharity.uk/> **Optional.**
- **<title>** Every penny you give goes to charity.
- **<solicitation_message>** 90% to The TEST Charity (registered charity number 9999905) and 10% to Pennies (registered charity number 1122489).

The Soundbite and URL are optional fields to display, we have found that some merchants don't want to include a clickable URL as this can lead the customer away from the checkout process.

The image shows a donation panel with several API fields annotated with red dashed lines. The panel content includes a heading, impact information, a URL, a donate button, donation details, and a solicitation statement. The annotations on the right side are:

- API FIELDS**
- Call to action (top) [Header Field]**
Would you like to add a donation to charity?
- Impact information (below) [Soundbite Field]**
Your support will help TEST charity do amazing things [lightbox link]
- URL [find out more]**
Links to charity site
- Donate button [Value Field]**
Displaying donation amount
- Title [Value Field]**
Every Penny you give does to charity
- Solicitation Statement [Solicitation Field]**
Every penny you give goes to charity: 90% to CHARITY NAME (registered charity no. 1234567) and 10% to Pennies (registered charity no. 1122489).

Responsive design for mobile browser or app-based environments.

Thank you panel

The API fields in the thank you panel that can be edited by Pennies are:

- **<thank_you_message>** Thank you for donating to TEST Charity.
- **<title>** Every penny you give goes to charity **Optional.**
- **<solicitation_message>** 90% to The TEST Charity (registered charity number 9999905) and 10% to Pennies (registered charity number 1122489).

API FIELDS

- Thank you message (top) [Header Field]**
Thank you for donating to TEST charity
- Title [Value Field]**
Every Penny you give does to charity
- Solicitation Statement [Solicitation Field]**
Every penny you give goes to charity: 90% to CHARITY NAME (registered charity no. 1234567) and 10% to Pennies (registered charity no. 1122489).

Note: The donation amount is pulled through from the API donation set-up.

Note: If using Shopify Multi Currency feature a specific solicitation statement is required.

Discounts

How do I ensure a donation is not discounted?

When adding the Pennies extension to your shop, it is important to ensure that donations are not discounted when a user applies a discount code. Shopify allows you to specify which products a discount applies to. The best way to manage this is by creating a collection for all products where discounts are allowed, excluding the donation product from that collection.

To ensure that the donation product is not included when applying a discount code in **Shopify**, follow these steps. This section will also guide you how to create discount codes which will follow the collection rule you will be creating.

To configure a discount code specific to certain products:

1) Create a new collection

- Navigate to **Products > Collections** in the Shopify Admin.
- Name it something easy to remember such as '**Discounts Allowed**'.
- Set the Collection type to be '**Automated**'.
- Set a rule to be '**Product Type**' 'is equal to' and then a tag such as '**discount-allowed:true**'.

The screenshot displays the 'Create new collection' form in the Shopify Admin. It is divided into three main sections:

- Title:** A text input field containing 'Discounts Allowed'.
- Description:** A rich text editor with a toolbar showing options for Paragraph, Bold (B), Italic (I), Underline (U), Text color (A), List, Link, Image, and Grid. The description field is currently empty.
- Collection type:** Two radio button options: 'Manual' (unselected) and 'Automated' (selected). Below 'Manual' is a link to 'manual collections'. Below 'Automated' is a link to 'automated collections'.
- Conditions:** A section for setting rules. It starts with 'Products must match:' followed by two radio buttons: 'all conditions' (selected) and 'any condition'. Below this is a rule configuration row with three elements: a dropdown menu set to 'Tag', a dropdown menu set to 'is equal to', and a text input field containing 'discount-allowed:true'. A '+ Add another condition' button is located below the rule row.

2) Tag products with this new collection

There are multiple ways to add the ' **discount-allowed:true** ' tag to products. Here are three methods:

Note: Option A is the quickest and fastest way to add a tag.

Option A: Use Bulk Editing in Shopify.

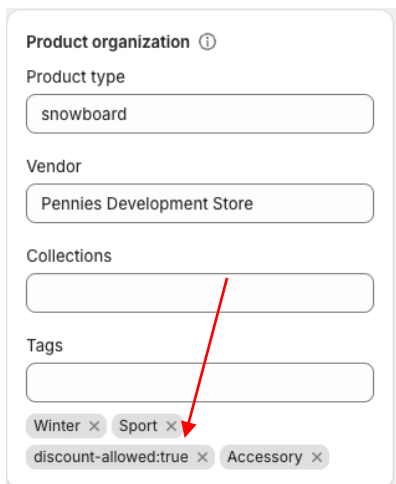
- Go to **Products** and select all the products you want to tag.
- Click the **three dots** at the top and select '**Add tags**'.
- Enter the tag ' **discount-allowed:true** '. This will add the tag to all selected products.
- Once done, manually find the donation product and **remove the tag** from it to ensure it isn't included.

Option B: Product Export and Import.

- Go to **Products > Export** and download a CSV file of your products.
- Add the new ' **discount-allowed:true** ' tag to the relevant products in the CSV file.
- Upload the updated CSV back into Shopify by going to **Products > Import**.
 - This method is more suitable if you have a large product catalogue.

Option C: Use the Bulk Editor.

- Go to **Products** and select all the products.
- Click '**Bulk Edit**' and add a **Tag** column to the editor.
- Add the tag ' **discount-allowed:true** ' to the relevant products.
- Ensure you select '**All products in the store**' if you want to apply the tag across your entire inventory.



The screenshot shows the 'Product organization' section of the Shopify Bulk Editor. It includes fields for 'Product type' (snowboard), 'Vendor' (Pennies Development Store), and 'Collections'. The 'Tags' section is highlighted with a red arrow, showing a list of tags: 'Winter', 'Sport', 'discount-allowed:true', and 'Accessory'. The 'discount-allowed:true' tag is the focus of the red arrow.

Configure a 'new' discount to apply to the 'Discounts Allowed' section

Important: Each new collection **MUST** have its own discount code applied to it; without this step the donation will be discounted. This discount code can then be changed in line with your promotions. Please follow the guidance in Shopify to create a discount code.

Testing

Please ensure that all testing is done in sandbox. Any test donations made in the Live Production Environment will be recorded as actual donations.

Before going live, it is important to thoroughly test your setup to ensure everything is functioning as expected. Pennies can help you as required and recommend that we complete a validation before you go live. This is light touch and ensures you meet the Pennies and charity requirements before going live.

For testing, we recommend adding the Pennies App to a staging environment and/or a test theme. Simply choose the 'Test' option on 'API Settings' in the dashboard.

- **Personalised Test Credentials** – If you require a bespoke test set up, like your own charity, different charity logo or a donation proposition. Please contact Pennies.
- **Live Credentials** – **Care** Your test credentials also apply to the **Live** version of your site.

There are four test accounts, each calculates the donation value differently and shows a different charity:

Top Up Fixed 25p

- Fixed value donation, regardless of the basket value, of £0.25. The value can be decided by the merchant.
- **Merchant ID:** 10001707

Round Up to Pound

- The donation value rounds the basket value up to the nearest pound i.e. a basket value of £9.99 would create a £0.01 donation value solicitation.
- **Merchant ID:** 10001721

Flexi to pound or fixed 25p

- A combination of the above two models, where the donation value is normally a round up to the nearest pound based on the basket value, but if the value is already a round value, a fixed donation of £0.25 is solicited.
- **Merchant ID:** 10001738

Banding

- Based on basket size, the donation value will change, for example under £5 no donation is solicited, between £5.00 and £9.99, £0.25 is solicited, and from £10.01 upwards, £0.50 is the given option. Rules for donation value are set by Pennies based on the merchant's wishes.
- **Merchant ID:** 10001745

Multiple Choice

- Multiple donation options are presented to the customer to select from. This can be in the form of a drop-down menu or radio buttons.

Going Live

Production Credentials – Care; when you receive a Production Pennies ID, it is specifically set up for the donation method and charity that you have requested for your live site and confirmed in the Charity Proposition form. If you want to switch to a different donation method or charity, you will need to request this from Pennies at product@pennies.org.uk

When you have completed testing, we have validated, and the other projects steps explained above are also completed, you will need to follow the below steps to enable the Pennies Extension in the live environment.

1. Go to the Shopify backend and navigate to the **Pennies App -> Configuration**
2. Click on **Live**
3. Please enter your **Merchant ID** and **Access Token** that Pennies have provided to you.
4. Tick '**Share daily transaction count with Pennies**'
5. Click on **Save**

Note: After this point, any donation logged will be seen as real and requested by Pennies to grant to charity

Example of Go Live Settings

API Settings

Integration Type
 Live Test

Merchant ID
XXXXXXX

Access Token
XXXXXX

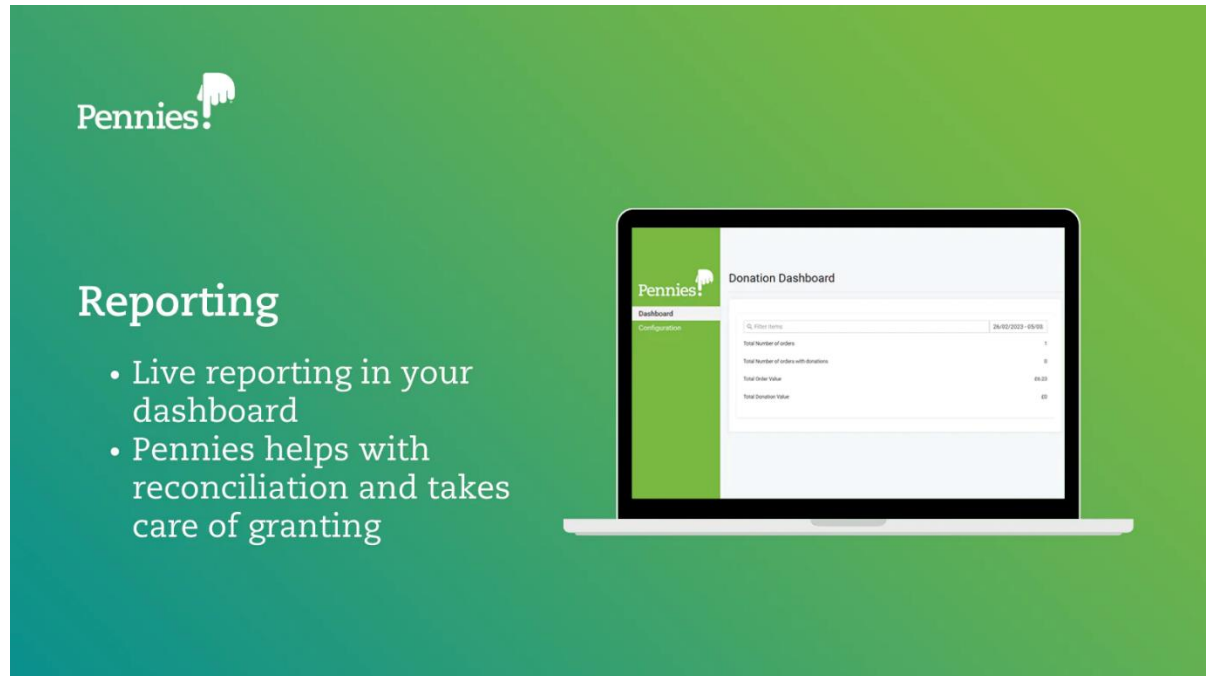
Share daily transaction count with Pennies

Save

Reporting, Reconciliation and Granting

Reporting

Once you have Pennies set up and live, you will see a live report of donations in your 'Donation Dashboard'. This report can also be exported.



The image shows a laptop displaying the Pennies! Donation Dashboard. The dashboard includes a sidebar with 'Dashboard' and 'Configuration' options. The main content area shows a date range selector set to '26/07/2023 - 05/08' and a table with the following data:

Category	Value
Total Number of orders	1
Total Number of orders with donations	1
Total Order Value	£8.23
Total Donation Value	£0

Reporting

- Live reporting in your dashboard
- Pennies helps with reconciliation and takes care of granting

Finance

Accounts and Finance Teams are as much a part of a Pennies project as the IT and Retail Teams. They are critical in moving the donations to Pennies for granting to the charities. Reporting requirements will need to be gathered. If PO numbers are required in Settlement Requests, please ensure that these are communicated to Pennies.

Typically, Pennies will send the Settlement Request on or around the 5th of each month for the previous calendar month's donations. If required, this can be changed to weekly or, if dates are provided, to a bespoke interval of the merchant's choice. Examples of reports and data that Pennies will send can be found on the following page.

Settlement and Reconciliation

On a predefined schedule, typically once a month on or around the 5th, Pennies will email a Donation Settlement Request (similar in many ways to an invoice) to the merchants Accounts Payable/Finance Team requesting the donations collected in the previous period are transferred electronically to Pennies. A weekly or other pre-arranged interval can be arranged for the transmission of these requests.


The email will contain two files (examples below), one is a PDF containing the daily and monthly total of donations and their value, the second is a .CSV containing donation level information (again please see examples below).

With this in mind, a merchant system report showing the volume and value of donations will be required so that the merchant's Finance Team is able to check and agree the values to be transferred to Pennies.

In some cases, the payment system portal logs all donation values and can be used to aid reconciliation processes. For e-commerce and applications, it should be built into the back-end reporting systems.

Reporting systems should provide data showing the volume and value of donations, from a specified date range, and show the time the donation was logged.

Some accounts systems will require Pennies to be set up as a supplier. If this is the case then the Pennies Account Manager should be asked for the prerequisites. During an implementation, the Accounts personnel should have been introduced to their counterpart at Pennies so questions and queries can be raised and answered promptly.



SETTLEMENT REQUEST FOR PENNIES DONATIONS

To		Date of Settlement Request	
Test Retailer Limited		31/12/2016	
Address		Merchant ID	
1 The Avenue		1000000	
London		Settlement Request Ref	
AB1 2CD		000000000001	

Donation File Details	Donation Date	Record Count	Donation Sum GBP
Pennies donations collected by Test Retailer	01/12/2016	189	£94.65
Pennies donations collected by Test Retailer	02/12/2016	271	£135.70
Pennies donations collected by Test Retailer	03/12/2016	134	£66.70
Pennies donations collected by Test Retailer	04/12/2016	61	£30.50
Pennies donations collected by Test Retailer	05/12/2016	110	£53.75
Pennies donations collected by Test Retailer	06/12/2016	170	£84.30
Pennies donations collected by Test Retailer	07/12/2016	173	£86.50
Pennies donations collected by Test Retailer	08/12/2016	272	£135.85
Pennies donations collected by Test Retailer	09/12/2016	237	£118.50
Pennies donations collected by Test Retailer	10/12/2016	85	£42.45
Pennies donations collected by Test Retailer	11/12/2016	42	£19.75
Pennies donations collected by Test Retailer	12/12/2016	117	£56.05
Pennies donations collected by Test Retailer	13/12/2016	198	£99.00
Pennies donations collected by Test Retailer	14/12/2016	186	£93.00
Pennies donations collected by Test Retailer	15/12/2016	201	£100.76
Pennies donations collected by Test Retailer	16/12/2016	228	£114.00
Pennies donations collected by Test Retailer	17/12/2016	99	£49.90
Pennies donations collected by Test Retailer	18/12/2016	31	£15.45
Pennies donations collected by Test Retailer	19/12/2016	157	£78.22
Pennies donations collected by Test Retailer	20/12/2016	235	£118.65
Pennies donations collected by Test Retailer	21/12/2016	168	£84.00
Pennies donations collected by Test Retailer	22/12/2016	180	£89.95
Pennies donations collected by Test Retailer	23/12/2016	106	£53.00
Pennies donations collected by Test Retailer	24/12/2016	77	£38.50
Pennies donations collected by Test Retailer	25/12/2016	10	£5.00
Pennies donations collected by Test Retailer	27/12/2016	22	£11.05
Pennies donations collected by Test Retailer	28/12/2016	37	£18.50
Pennies donations collected by Test Retailer	29/12/2016	31	£15.15
Pennies donations collected by Test Retailer	30/12/2016	24	£12.00
Pennies donations collected by Test Retailer	31/12/2016	5	£2.50
TOTALS		3796	£1,895.53

Agreed Adjustments	
Details:	
Net Settlement this Period GBP	£1,895.53

Please note that this may not represent all donations for the stated period as additional donations may be reported and therefore requested in subsequent statements

Payment Advice	The Net Settlement amount is now due and should be paid directly to the bank account detailed below, quoting the following ref: 22AAA000000
-----------------------	---

Receiving bank details	
Bank: HSBC	Account Number: 52324784
Sort Code: 40-04-01	Account Name: Pennies Retailer Donation Account
IBAN:	

Any queries please email sales.ledger@pennies.org.uk, or call 0207 6009286
Please note that voluntary donations to charity are deemed to be non-business income and outside the scope of VAT

Registered address
Pennies! | Third Floor | 140 London Wall | London EC2Y 5DN | www.pennies.org.uk
Charity No. 1122489 | Company No. 6418962

Settlement request example

Merchant ID	Merchant	Store ID	Store Name	Terminal ID	Donation Date Time	Donation Amt	Pennies Invoice Number	Donation File
12345678	Penny and Sons	0	GBP	0	20/04/2018 09:50	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	20/04/2018 10:17	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	23/04/2018 09:53	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	24/04/2018 11:49	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	24/04/2018 15:57	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	24/04/2018 17:24	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	25/04/2018 11:35	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	25/04/2018 15:21	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	26/04/2018 16:10	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	27/04/2018 11:12	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	30/04/2018 09:40	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	30/04/2018 15:47	0.25	5386	0
12345678	Penny and Sons	0	GBP	0	03/04/2018 13:23	0.25	5386	0

CSV settlement request example

Operations, Maintenance, and Support

Failover / Recovery Process

In the unlikely case the Pennies service is unavailable, the customer will not be prompted for a donation and the sales flow can proceed gracefully.

Technical support

For any issues, please look at our FAQ in dashboard of the Pennies Shopify extension and for any other help or support – please contact Pennies: product@pennies.org.uk

Reviewing the Pennies Extension

Once live, we would be grateful if you could take a moment to leave a review on our app page. Your feedback helps us improve our service. Thank you.