ShoppingGives

Omnichannel Giving Guide:

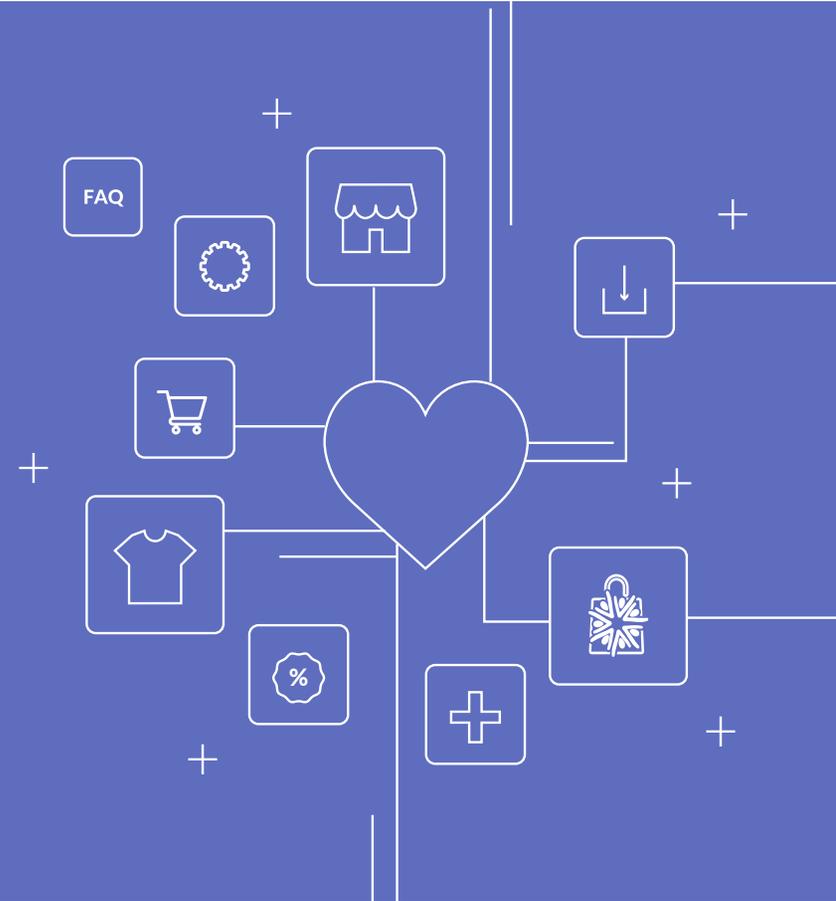ShoppingGives <> Shopify POS

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Introduction

Welcome to the giving economy!

Show your customers that what matters to them, matters to you. Your customers shop as usual, with the added delight of being able to select a cause to benefit from their purchase – aligning their values, with your brand.

Have a cause that's near and dear to your heart? Share that sentiment with your shoppers! Show them that every level of your organization is committed to the greater good, and that by shopping with you, they join that commitment.

If at any point you need assistance with processing a transaction at Shopify POS, reach out to us directly at **312-588-6176** or at support@shoppinggives.com. Our team is available to assist you, just a phone call away!

We're proud to call you our partners, let's make the world a better place together.
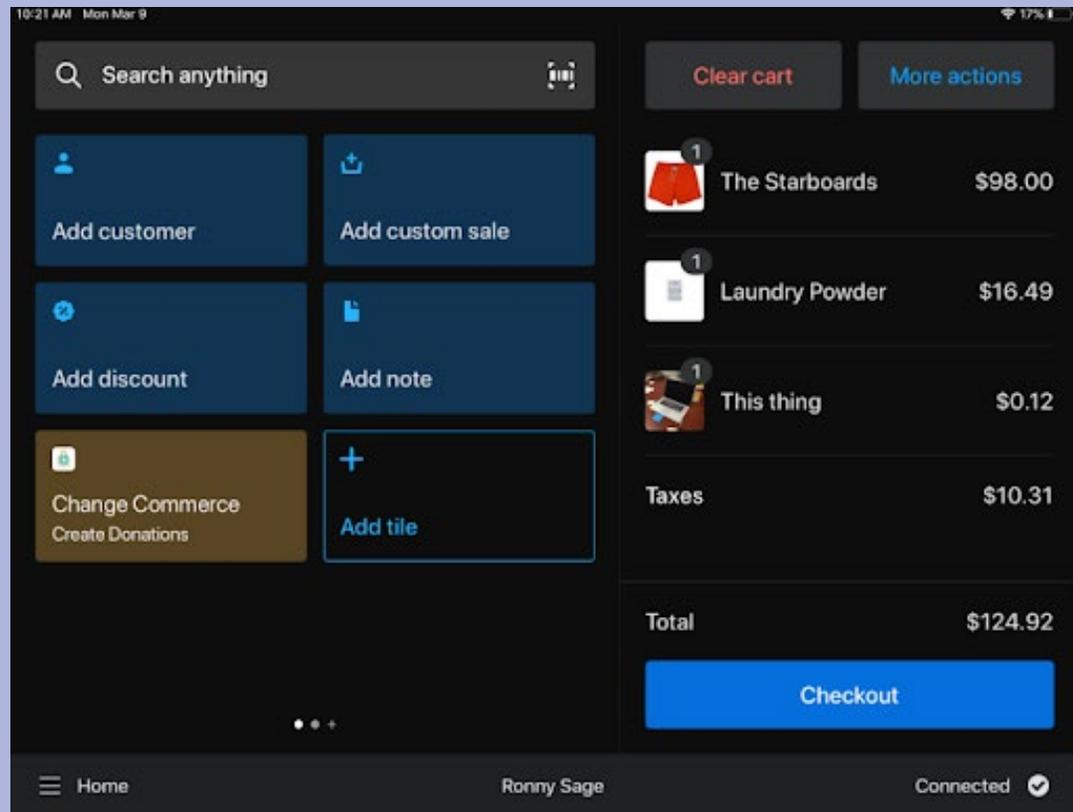
Cheers,
The ShoppingGives Team

Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

If your organization is electing to **let your shopper choose which cause to support** with their purchase, you'll want to follow along to the step-by-step guide below to successfully and effortlessly communicate and execute a purchase with a donation:

Step 1 *"Hi! Did you find everything you needed today?"*

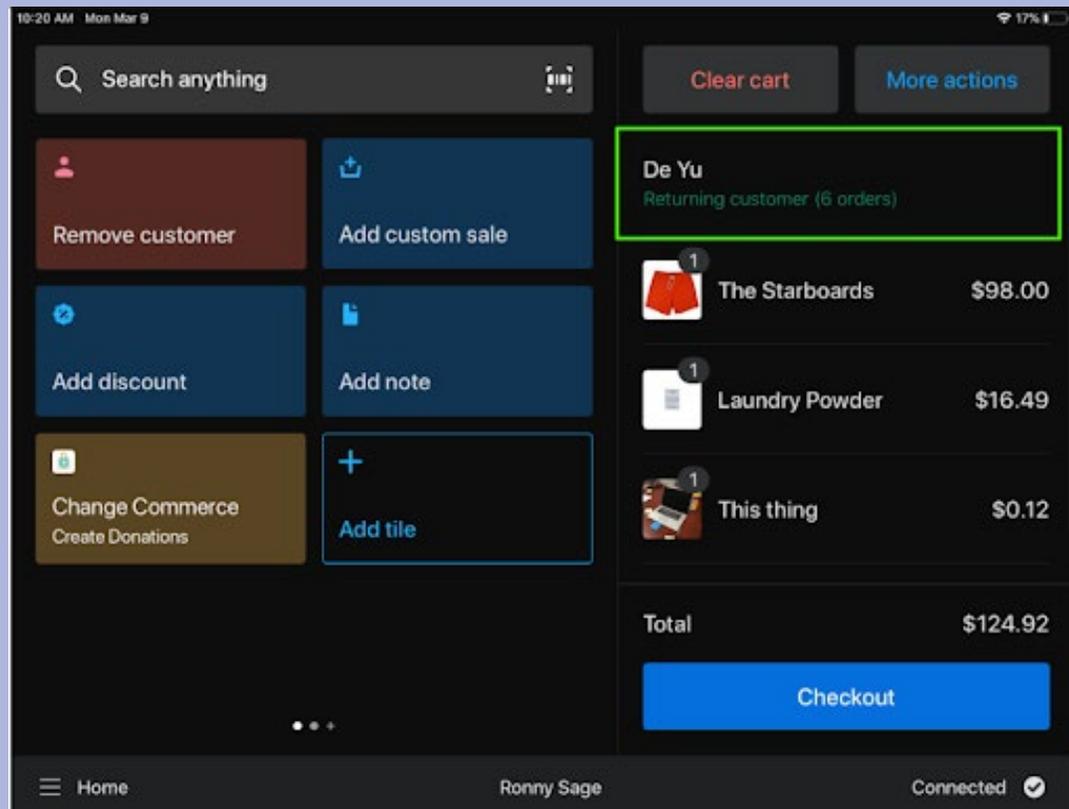- First, add all of your shopper's items to the cart:

Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

Step 2 *"Have you shopped with us before?"*

- Ask your customer if they've shopped with you before and tap on the "Add Customer" tile to add them to the cart.
  - If they have, search and select their customer contact.
  - If they have not, tap the **add new customer** button within the Add Customer screen to collect their information and add the customer to the cart.

- Once they've been added to the cart, you'll see their name appended to the top of the list of items in their order.
  - This is an important step for your organization and ours. Having customer information allows you to send order confirmation emails, view previous purchase history, and associate the order to the customer for future marketing communications!
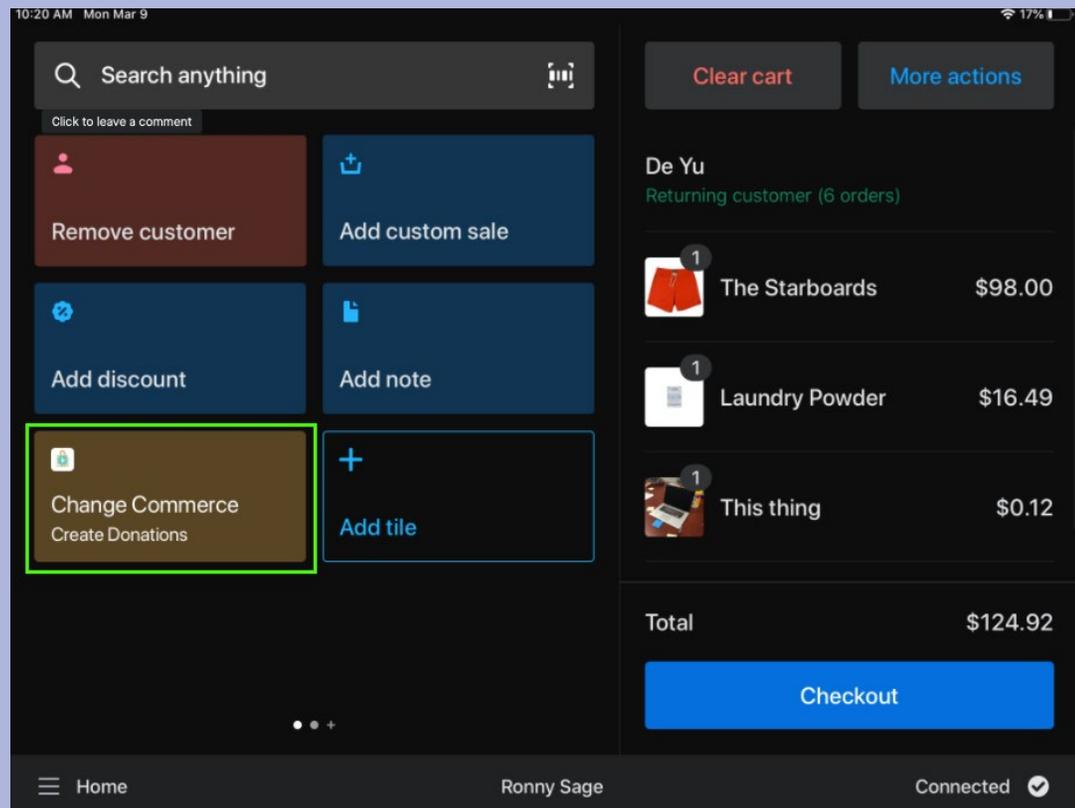
Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

Step 3 *"For every purchase made at our store, we donate to a cause that you support. Would you like to support a cause with your purchase today? Remember, **WE** will be doing the donating on your behalf"*

° Tap on the **Change Commerce - Create Donations** tile to access the ShoppingGives Change Commerce application:
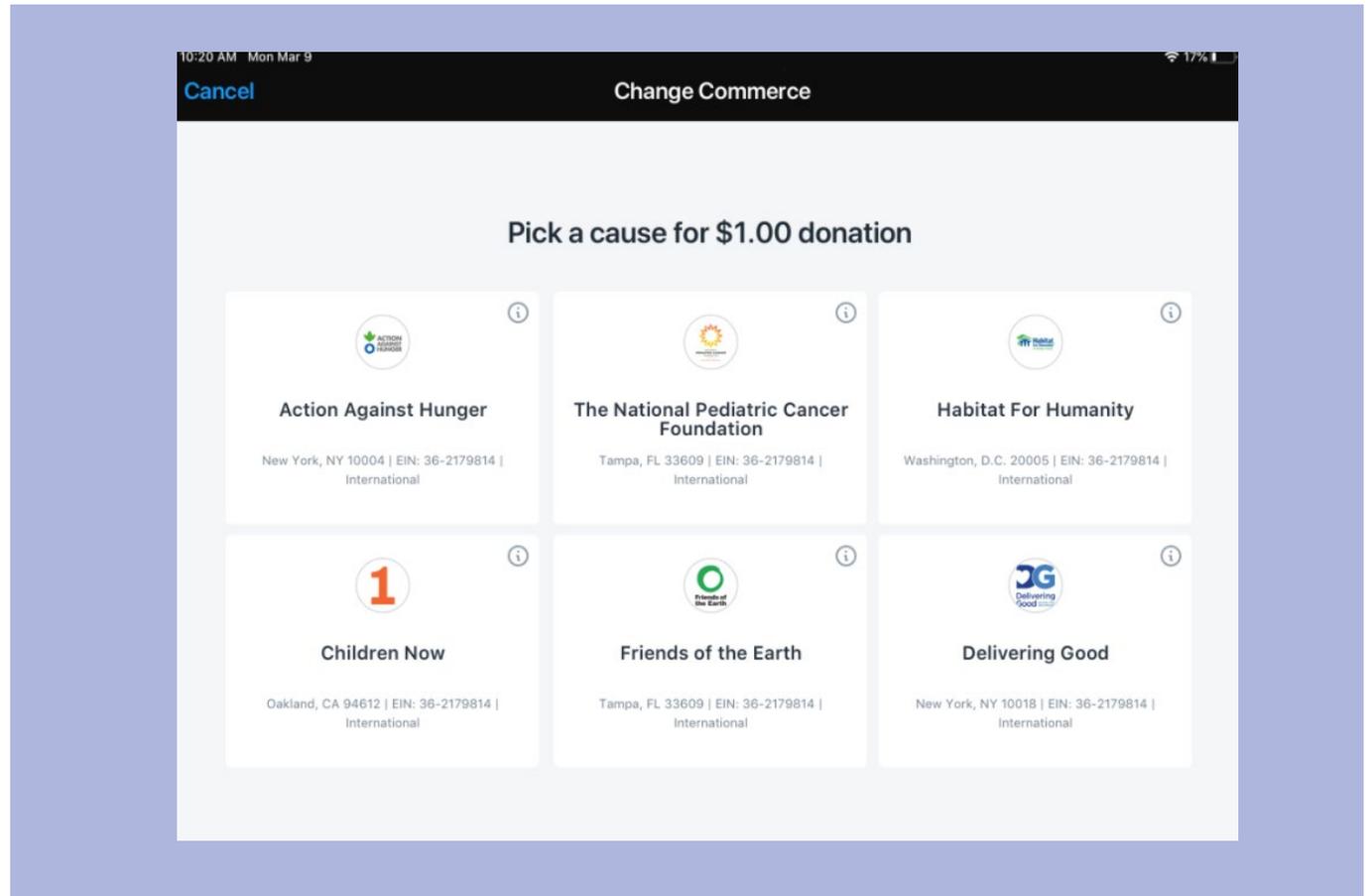
Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

Step 4 *"Great, here are some of the causes we are featuring - I personally support [cause_name] because it is near and dear to my heart"*

• Either show your customer the POS screen with the default causes from which they can choose, or feel free to list the options out for them. Tap on the cause when the selection has been made:
  • You can also click on the info icon to learn more about the featured cause!

Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

Step 5 *"Awesome, looks like we'll be donating $1.24 to Habitat for Humanity on your behalf. Would you like to receive a confirmation email about this donation?"*

• IMPORTANT - the customer must see or be told the donation amount that was generated by this purchase.

• Once the cause has been selected, all that's left to do is **confirm the donation**. On this screen you'll see the **donation amount** and **cause name**. Either you or your customer will be able to opt-in or out of receiving a Donation Confirmation Email from ShoppingGives.


• From this screen, you or your customer will also be able to click the **Update Causes** button if they've decided to support a different featured cause.

Your In-Store Giving Experience

Are you letting your shoppers pick a cause to support with their purchase?

Step 6 *"Thanks so much for helping us make a difference. Let's finish up your checkout!"*

- Complete the checkout by capturing the customer's payment information.

- For compliance, on the post-purchase screen, you or your customer will be able to confirm the donation amount and cause supported on this purchase and opt-in to the Donation Confirmation Email, if they did not do so before, by tapping on the **Change Commerce** tile:
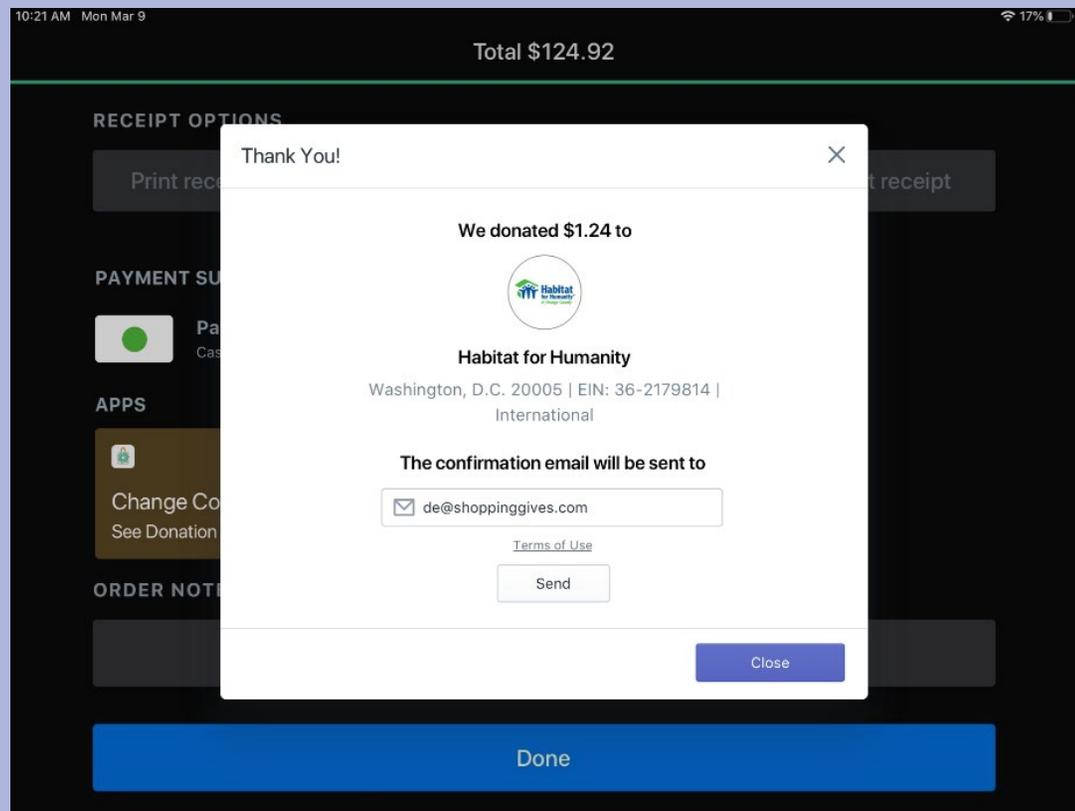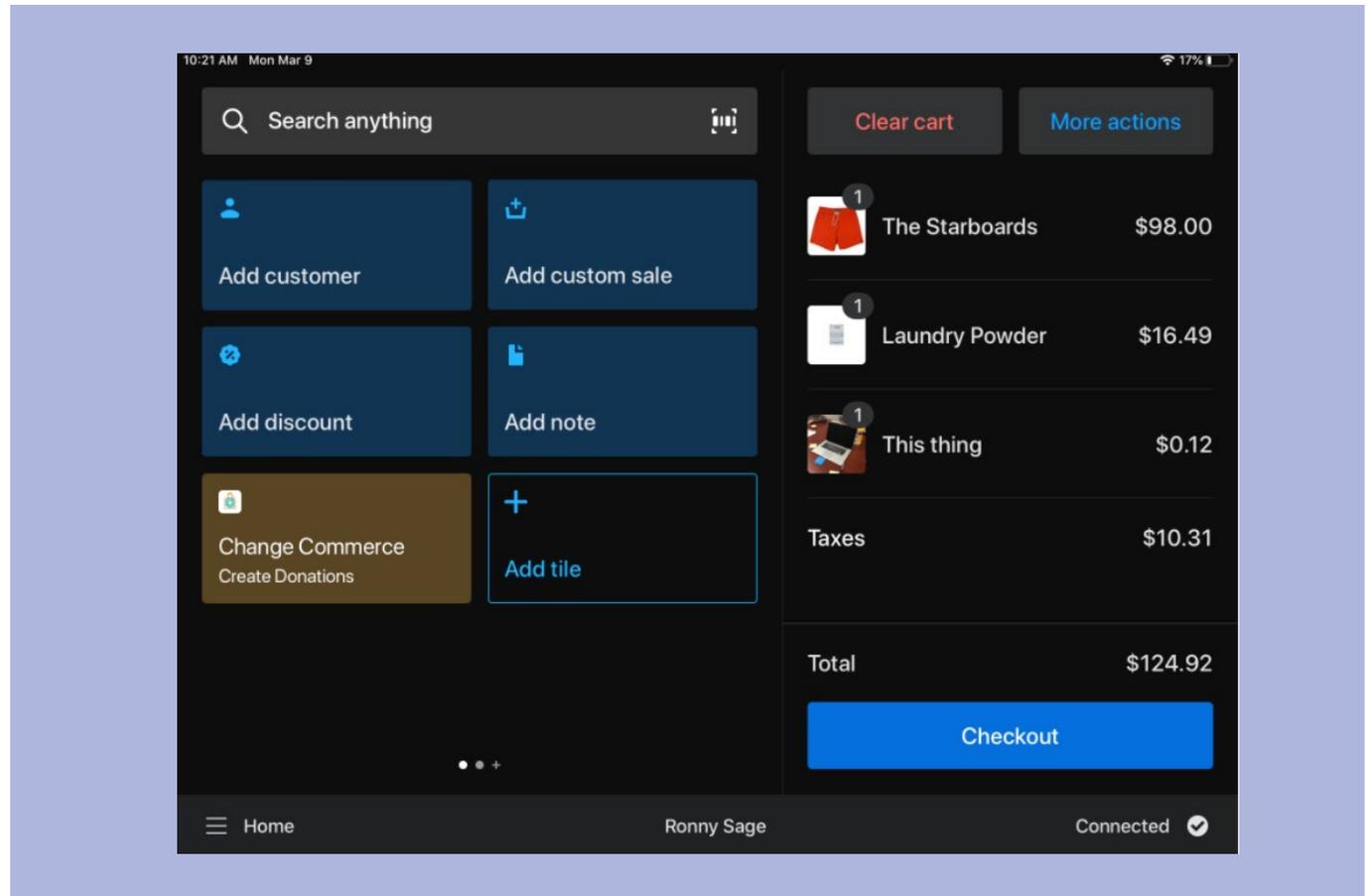
Are you defaulting donations to a specific cause on all purchases?

If your organization is electing to **default donations on all purchases to a specific cause or portfolio**, you'll want to follow along to the step-by-step guide below to successfully and effortlessly communicate and execute a purchase with a donation:

Step 1 *"Hi! Did you find everything you needed today?"*

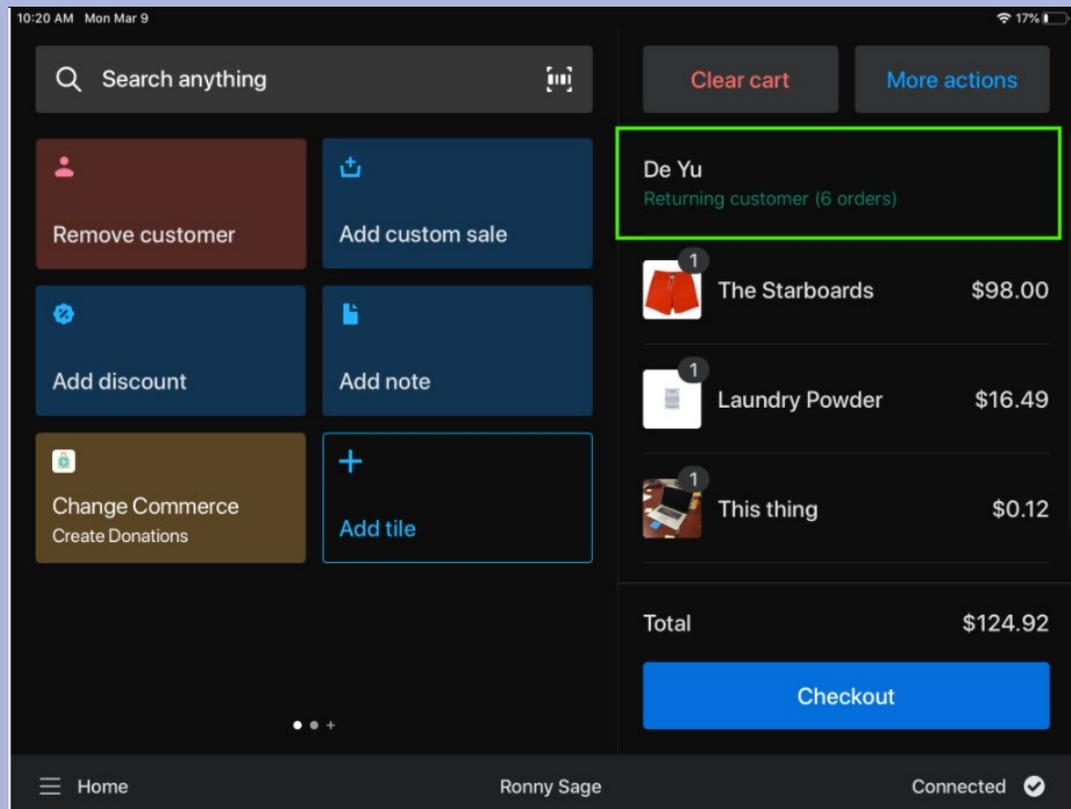• As you usually would, add all of your shopper's items to the cart:

Your In-Store Giving Experience

Are you defaulting donations to a specific cause on all purchases?

Step 2   *"Have you shopped with us before?"*

- Ask your customer if they've shopped with you before and tap on the "Add Customer" tile to add them to the cart.
  - If they have, simply search and select their customer contact.
  - If they have not, simply tap the **add new customer** button within the Add Customer screen to collect their information and add the customer to the cart.

- Once they've been added to the cart, you'll see their name appended to the top of the list of items in their order.
  - *This is an important step for your organization and ours. Having customer information allows you to send order confirmation emails, view previous purchase history, and associate the order to the customer for future marketing communications!*
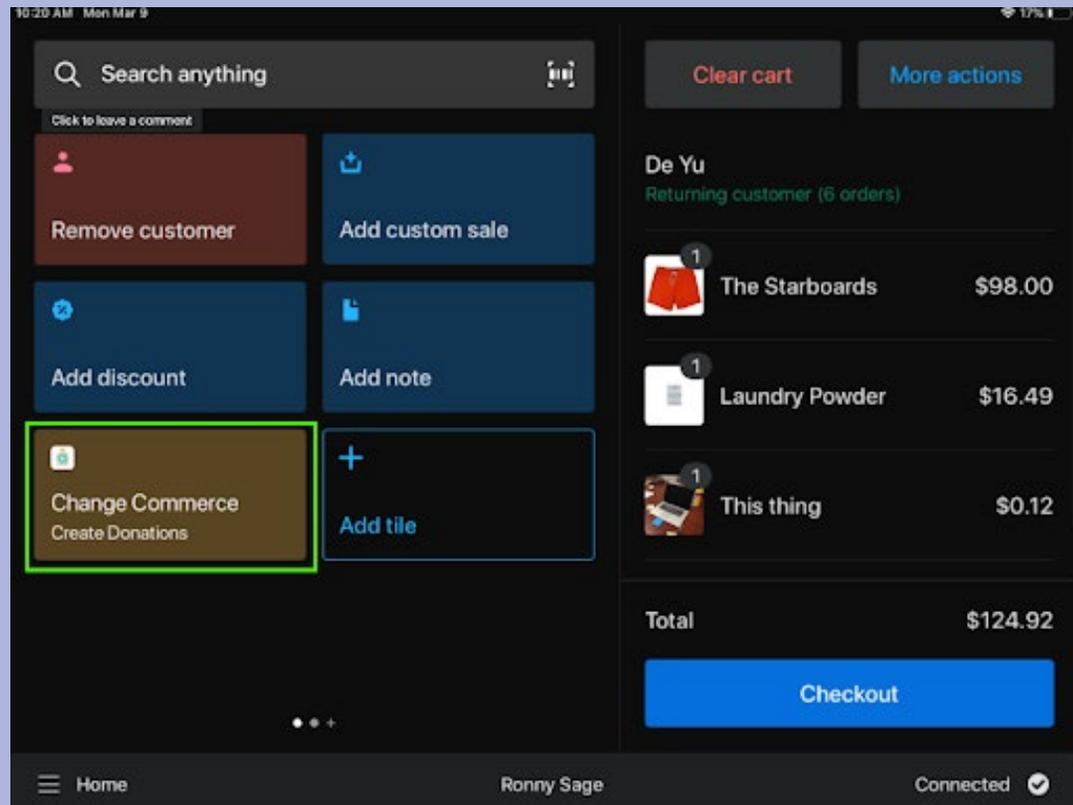
Your In-Store Giving Experience

Are you defaulting donations to a specific cause on all purchases?

Step 3   *"For every purchase made at our store, our company is donating [donation_amount] to support [cause_name]. This cause is extremely important to us because...*

Would you like to receive a donation confirmation email to track your impact with us? "

- IMPORTANT - the customer must see or be told the donation amount that was generated by this purchase.

- Tap on the **Change Commerce - Create Donations** tile to access the ShoppingGives Change Commerce application:

∘ Make sure the "Send me a confirmation email" box is checked and click the **confirm donation** button to proceed with the checkout:
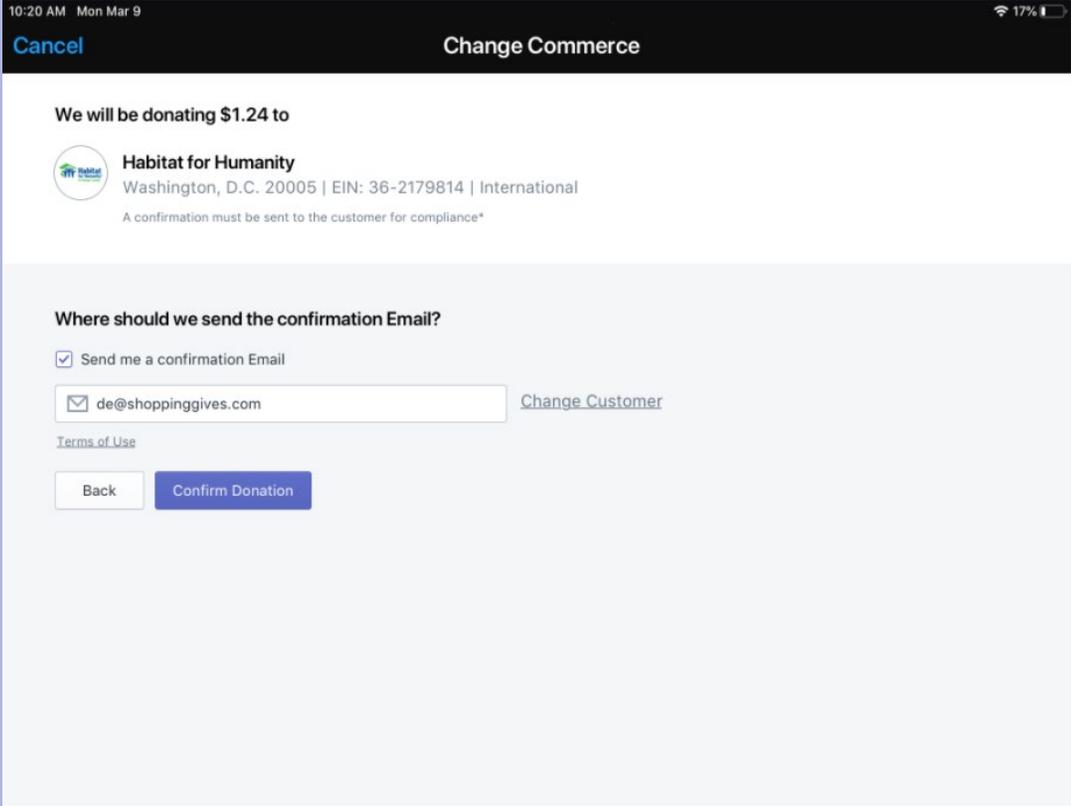
**Your In-Store Giving Experience**

Are you defaulting donations to a specific cause on all purchases?

Step 4 *"We're so excited to share our mission with you - thanks for shopping with us and helping us fuel this mission. Let's finish up your checkout!"*

- Complete the checkout by capturing the customer's payment information.

- For compliance, on the post-purchase screen, you or your customer will be able to:
    - Confirm the donation amount and cause supported on this purchase.
    - Opt-in to the Donation Confirmation Email if they did not do so before by tapping on the **Change Commerce** tile.
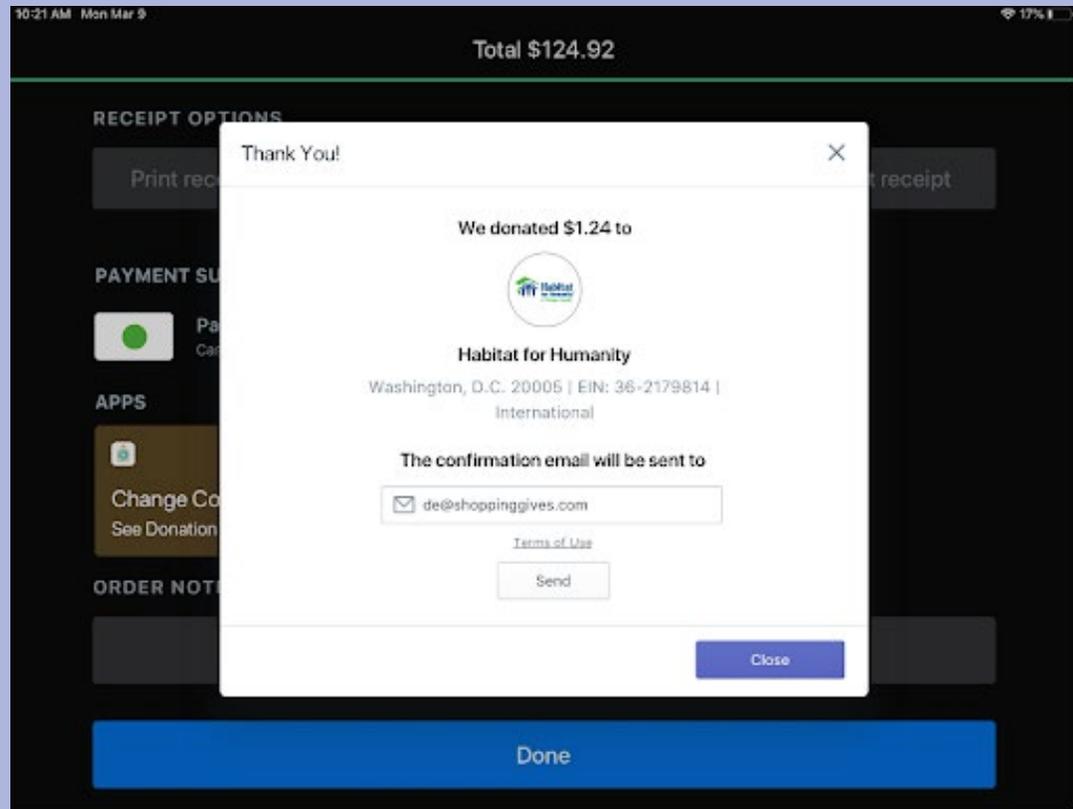
• If you forgot to tap the **Change Commerce** tile pre-purchase, we will not be able to display the cause name or donation amount in the post-purchase modal but the customer can still enter their email to receive this information directly:
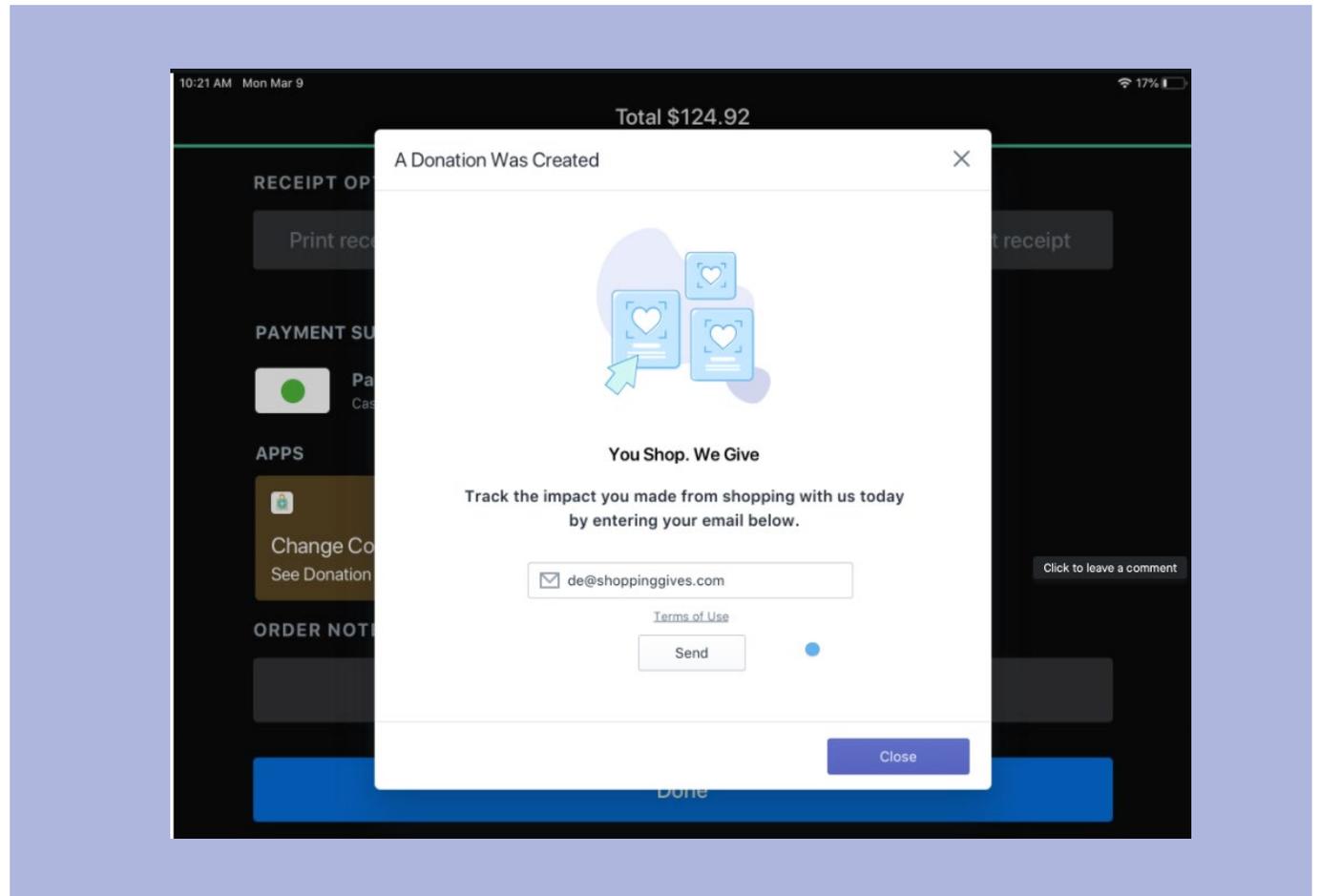
How to Stay Compliant

In order to be compliant under [Consumer Protection Laws](#), the law states that a **customer must be able to see or calculate the exact donation amount** a purchase is generating.

To ensure this, we have made sure to write this guide in a way that will effortlessly weave compliance into your interaction with the shopper. To highlight, the way we are doing this is:

- Including **donation amount** and **cause name** in multiple screens pre-purchase on the Change Commerce POS widget.

- Including **donation amount** and **cause name** in the post-purchase Change Commerce widget.

- Including **donation amount** and **cause name** in the Shopify order notes, for you to choose to include in your email, SMS, and physical receipts.

- 100% of proceeds are donated to the causes supported.

Let Us Help You

Q: My shopper and I forgot to select a cause before they checked out, is there a way they can support a cause with their purchase after they've paid?

A: Unfortunately, we do not currently support post-purchase cause selection, but keep an eye out for this feature coming in the future.

Q: Can the shopper add on their own donation to the purchase?

A: This is possible if your organization is defaulting donations to a cause on all purchases. However, this will need to be set up by the member on your team that handles the Change Commerce app. Have them reach out to support@shoppinggives.com to enable this feature.

Q: Can my shopper track the donations they've generated by shopping with our store?

A: Yes! If they opted into the Donation Confirmation Email via our app either pre or post-purchase, they will be able to create an account with ShoppingGives to track the impact they've made with their purchases.

How to Reach
the ShoppingGives Team

Support Line:
(312)-588-6176

Support Email:
support@shoppinggives.com

Need a 1:1 walkthrough?
Schedule time with us here or reach out to support@shoppinggives.com