

Charity Clients

30/07/2025 1:28 pm BST

Summary

Charity Clients are associated to payments when using the payment method 'Voucher'. This transfers the requested amount from the client to the charity.

Any transactions associated to a charity will display on the Charity Client's account.

This page documents the creation/restrictions of a Charity Client and how to take a payment and associate it to a Charity Client.

Details

Register a Charity Client

1. When adding a new Client, set the Client Category to 'Charity'.
2. Input information into all mandatory fields and select 'Save'.

Note: You are unable to add any Patients to a Client registered with the 'Charity' Client category.

Client Details | Additional Info | Notes | Documents | Communication | Data C

Client

Title: Mr/Mrs | Patient | Chip | ID | Stable | Reg. Date: 17/03/2023

Surname: * Charity | Patient: | Category: * Charity

First Name: * Guide Dogs

Address

Category: Home | Name/No: | Address: * 1 Test Rd | Town: * Leeds | County: | Postcode: * LS1 1AB

Tel and email

Home: | Business: | No Mobile: * | Fax: | No Per. Email: * | Introduced By: | Contact ID: 1217987

☒ This is the mailing address | ☐ Show Deactivated | Site: Esher

Make a Charity Payment

1. Take a Payment setting the Payment Method as 'Charity'.
2. Select 'Save' and the 'Charity Payment' window will appear.
3. Select the Charity from the list, enter the voucher number and description.

Receipt Date: 30/07/2025 Payment Method: Charity Amount Paid: 108.00 Available Fund: 108.00 Funds Allocated: 108.00

☐ Mark as payment in advance

Payment Allocation

Allocate	Receipt Date
<input type="checkbox"/>	13/05/2025 14:46
<input type="checkbox"/>	13/05/2025 16:38
<input type="checkbox"/>	29/05/2025 06:00
<input type="checkbox"/>	03/07/2025 16:18
<input type="checkbox"/>	18/07/2025 15:51
<input type="checkbox"/>	24/07/2025 15:36
<input checked="" type="checkbox"/>	30/07/2025 12:10

Charity Payment

Enter details of Charity Payment

Charity: Guide Dogs Charity

Voucher No: 123456

Description: Neuther

OK Cancel

4. Select 'Ok'.

The Accounts transaction will display on both accounts, and the balance will be located on the Charity account.

Client's Account:

£150.00 transferred to A Esher Animal Charity for Neutering, Vouch...	0.00
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Charity's Account:

£123.71 transferred from Mr A Smith (Id:15222) for Meg Smith Voucher, Voucher ...

£39.64 transferred from Mrs Tracy Jupiter (Id:1217343) for Charlie ID 1266434, V...

£108.00 transferred from Mr A Smith (Id:15222) for Neuther, Voucher No: 123456