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.

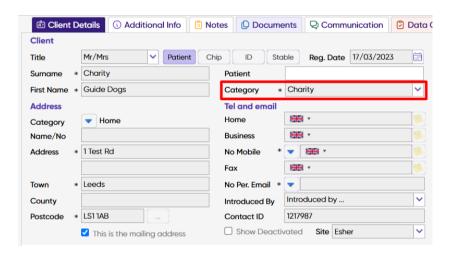Any transactions associated to a charity will display on the Charity Client's account.

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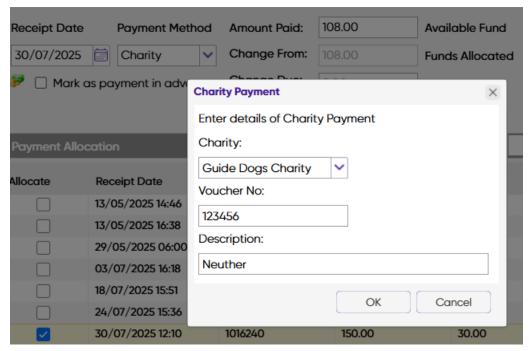
Details

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.

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.

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, Vouc... 0.

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