

Charity Clients

22/10/2024 9:20 am 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 Consent

Client

Title: Mrs | Patient | Chip | ID | Stable | Reg. Date: 23/01/2012

Surname: * Esher Animal Charity | Patient: | Category: Charity

First Name: * A

Address

Category: Home

Name/No: 15

Address: * Elwood Road

Town: * Esher

County: Surrey

Postcode: * GU4 8JR

☒ This is the mailing address

Tel and email

Home: 01234 56789

Business:

No Mobile: *

Fax:

No Email: *

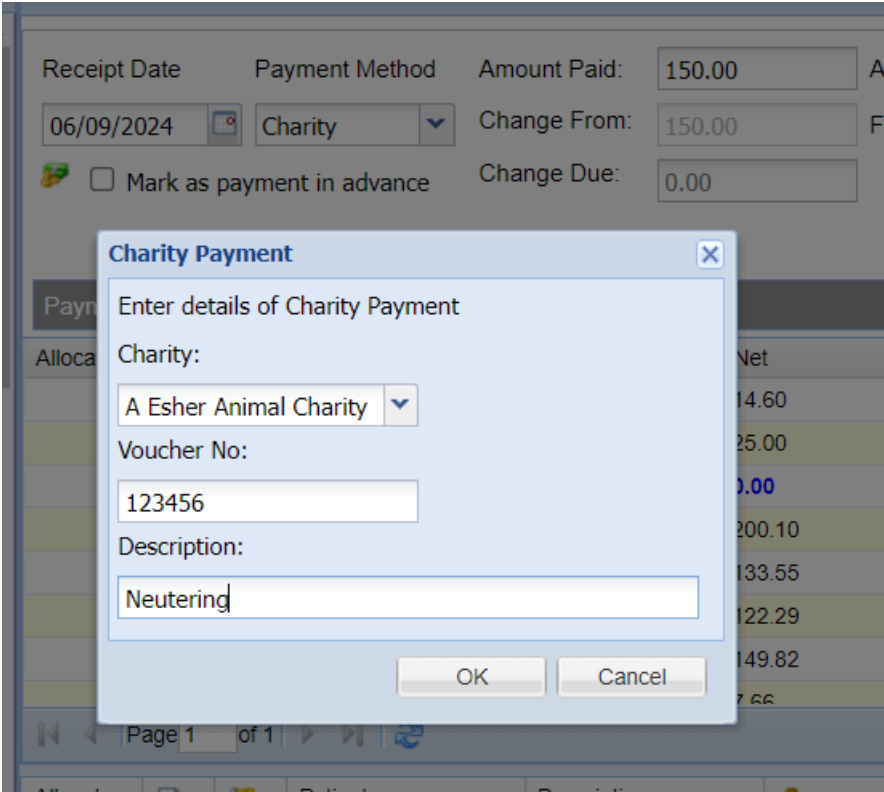
Introduced By: Introduced by ...

Contact ID: 1217342

☐ 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**.



- 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 |
|---|------|

Charity's Account:

| | |
|---|------|
| £150.00 transferred from Mrs T1 Jupiter (Id:1217343) for Neutering, Vo... | 1.00 |
|---|------|