



QuiSuite Charity

Gift Aid made simple: a step-by-step guide for people who have never claimed it

Example_QSCharity

Everything in this guide is done in the Demo Charity company on the QuiSuite USB test drive, so you can follow every step yourself.

How to use this guide

Plug in the QuiSuite USB drive, open **TestDrive.bat**, press **4** for QuiSuite Charity, and log in as **Admin** with the password **Admin**.

Read a page, then do the same thing on the screen. Nothing you do can harm anything: the test drive starts afresh every time.

QuiSuite Platform version 1.33

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Welcome to QuiSuite Charity

QuiSuite Charity is a **Vertical Application**: a program made for one kind of organisation, built on the full QuiSuite accounts system. It is for charities, community trusts and churches that take donations and want to claim **Gift Aid** from HMRC without the paperwork.

25p claimed on every £1 a UK taxpayer gives	£30 the most a small cash gift can be under the Small Donations Scheme	4 years to claim, from the end of the charity's year
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In this guide you will:

- learn what Gift Aid is, in plain English, and why some gifts carry it and others do not;
- set the charity up, record donors, their Gift Aid declarations and their gifts;
- make a claim, send it to HMRC and record HMRC's payment;
- see the reports and the dashboard that keep you on top of it.

Starting QuiSuite Charity



Figure 1. The splash screen



Figure 2. Logging in to Demo Charity

When QuiSuite Charity starts, its splash screen shows its own name under **Powered by QuiSuite Platform**, with the program version and the database version. The two always match: when QuiSuite is updated, the database is updated with it.

The login window lists the companies this program may open. On the test drive it offers **Demo Charity**. Log in as **Admin**, password **Admin**. In your own copy you choose your own users and passwords in **Administrator > Users**.

The main window

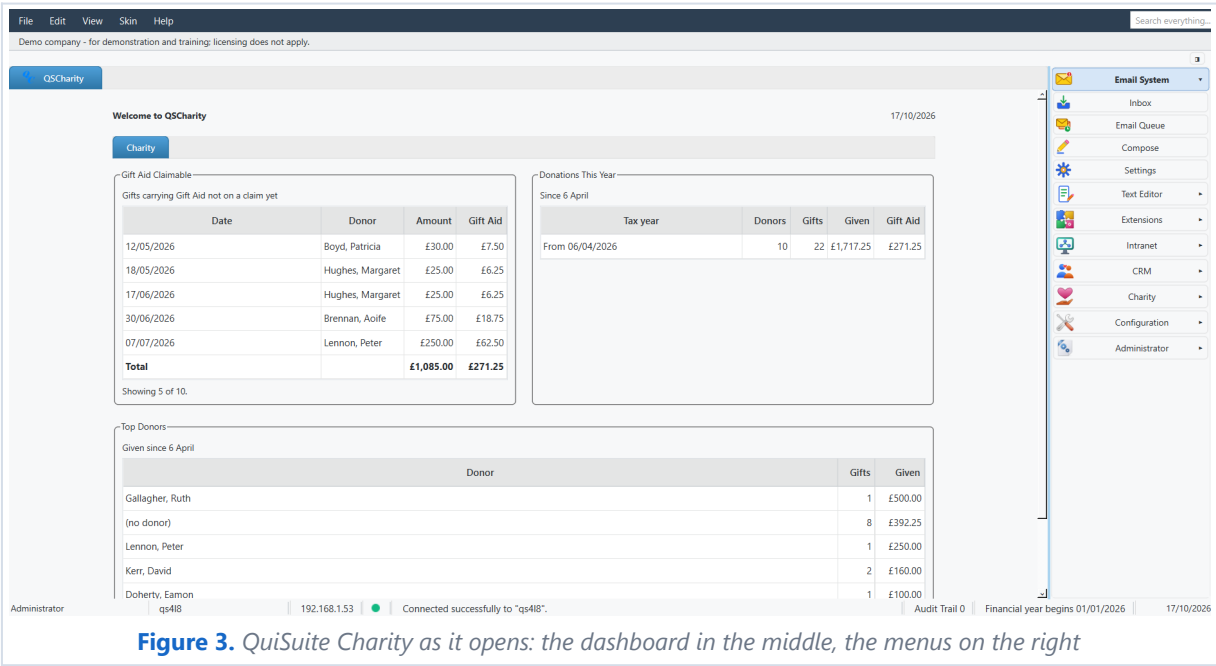


Figure 3. QuiSuite Charity as it opens: the dashboard in the middle, the menus on the right

This is the whole window as it first opens. The **dashboard** fills the middle and shows the charity at a glance: Gift Aid waiting to be claimed, the donations this tax year and the top donors. The **menus** are on the right: Email, the Text Editor, Extensions, the Intranet and the CRM, which every QuiSuite program shares, then **Charity**, which is what this guide is about, then Configuration and Administrator.

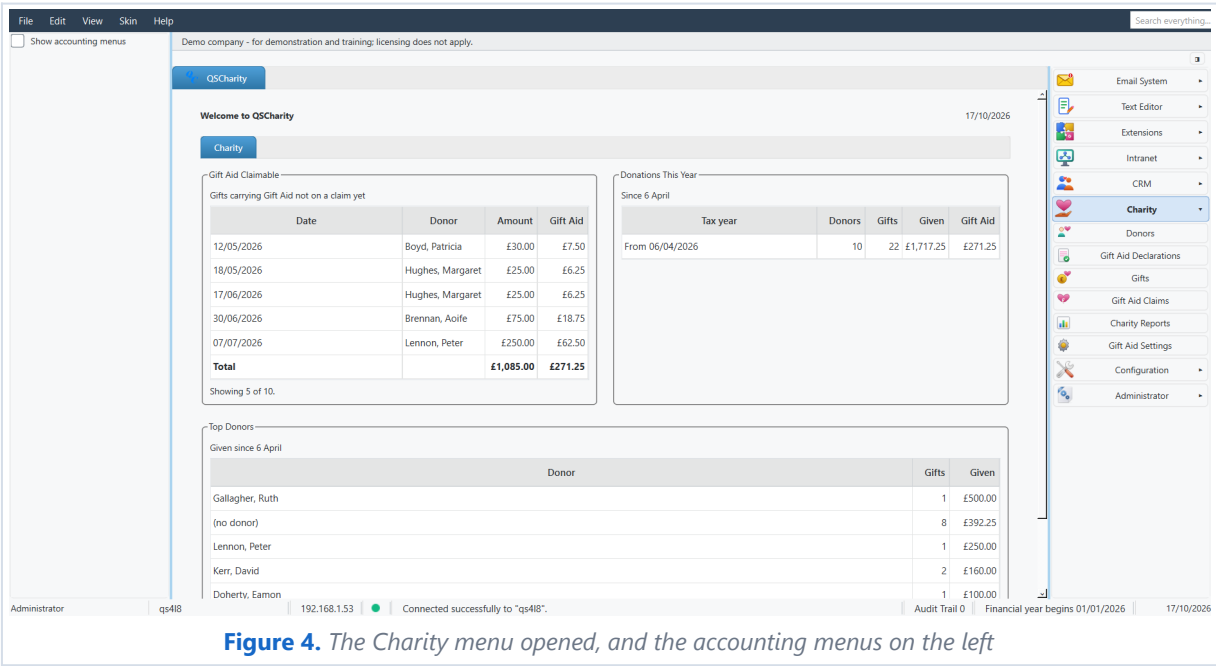


Figure 4. The Charity menu opened, and the accounting menus on the left

Click **Charity** and its six items open beneath it: **Donors**, **Gift Aid Declarations**, **Gifts**, **Gift Aid Claims**, **Charity Reports** and **Gift Aid Settings**. Each one has a chapter of this guide.

Behind the scenes QuiSuite Charity is a complete accounts system: every gift banked and every claim made is posted to the ledgers for you. The accounting menus are kept out of the way on the left. They are hidden until you press **F10** (or **Help > Toggle Menu**) and tick **Show accounting menus**, so a volunteer who only records gifts never sees them.

Gift Aid in plain English

What Gift Aid is

When a UK taxpayer gives a charity £100, they have already paid income tax on that money. Gift Aid lets the charity claim the **basic-rate tax** back from HMRC. Basic-rate tax is 20%, and £100 is what is left of £125 after 20% tax, so HMRC pays the charity the missing **£25**. That is why Gift Aid is always **25p for every £1** given.

The donor gives	Gift Aid the charity claims	The charity receives in all
£10	£2.50	£12.50
£25	£6.25	£31.25
£100	£25.00	£125.00
£500	£125.00	£625.00

When a gift carries Gift Aid

A gift carries Gift Aid only when **all** of these are true. QuiSuite checks every one for every gift, and writes the reason down when one fails:

- 1. The donor has made a Gift Aid declaration** that covers the date of the gift: a simple statement that they are a UK taxpayer and want the charity to claim. It can cover gifts from its date onwards, and gifts of the **4 years before** it.
- 2. The donor is an individual**, not a company. A company gets tax relief on its gifts its own way, through its own tax return.
- 3. The donor gets nothing much back.** A gala dinner ticket, say, buys a meal. HMRC allows a donor a little in return (up to 25% of a gift of £100 or less) but no more.
- 4. It is the donor's own money**, given freely: not a payment for goods or services, and not a membership fee that buys real benefits.
- 5. The declaration still stands.** A donor can cancel it at any time, for example when they stop paying UK tax.

The Demo Charity's gifts, one by one

The Demo Charity, **Greenfield Community Trust**, has been given gifts that show every rule. This table is the heart of the guide. Every one of these is in the test drive, and you will meet each of them again on the screen:

Donor and gift	Gift Aid?	Why
Margaret Hughes, £25 a month by standing order	Yes: £6.25 each	A written declaration covers every gift.
Peter Lennon, £250 by cheque	Yes: £62.50	A written declaration covers it.

Donor and gift	Gift Aid?	Why
Claire Davidson, £40 sponsorship	Yes: £10.00	Sponsored-event gifts carry Gift Aid; they are marked "Sponsored" on HMRC's schedule.
Aoife Brennan, £75 online	Yes: £18.75	She lives in Dublin but pays UK tax. Her postcode goes to HMRC as X.
Patricia Boyd, £30 in May	Yes: £7.50	Her declaration covered it then.
Patricia Boyd, £30 in August	No	She cancelled her declaration on 30 June: she no longer pays UK tax.
Sean O'Neill, £50	No (yet)	He gave his declaration over the phone. An oral declaration only counts once the charity has posted him a written record of it.
David Kerr, £60 gala dinner ticket	No	The meal is worth £40. HMRC allows only £15 back on a £60 gift.
Harbourside Building Supplies Ltd, £250	No	A company, not a person.
Eamon Doherty, £100	No, then Yes	No declaration at first. He signs one later, and because a declaration covers the past 4 years, his gift then carries £25.
Collection tins and contactless, £8 to £26 each	Small Donations Scheme	No declaration needed: see below.
One £45 cash gift	No	Too big for the Small Donations Scheme (£30 at most) and no donor to claim Gift Aid from.

The Gift Aid Small Donations Scheme

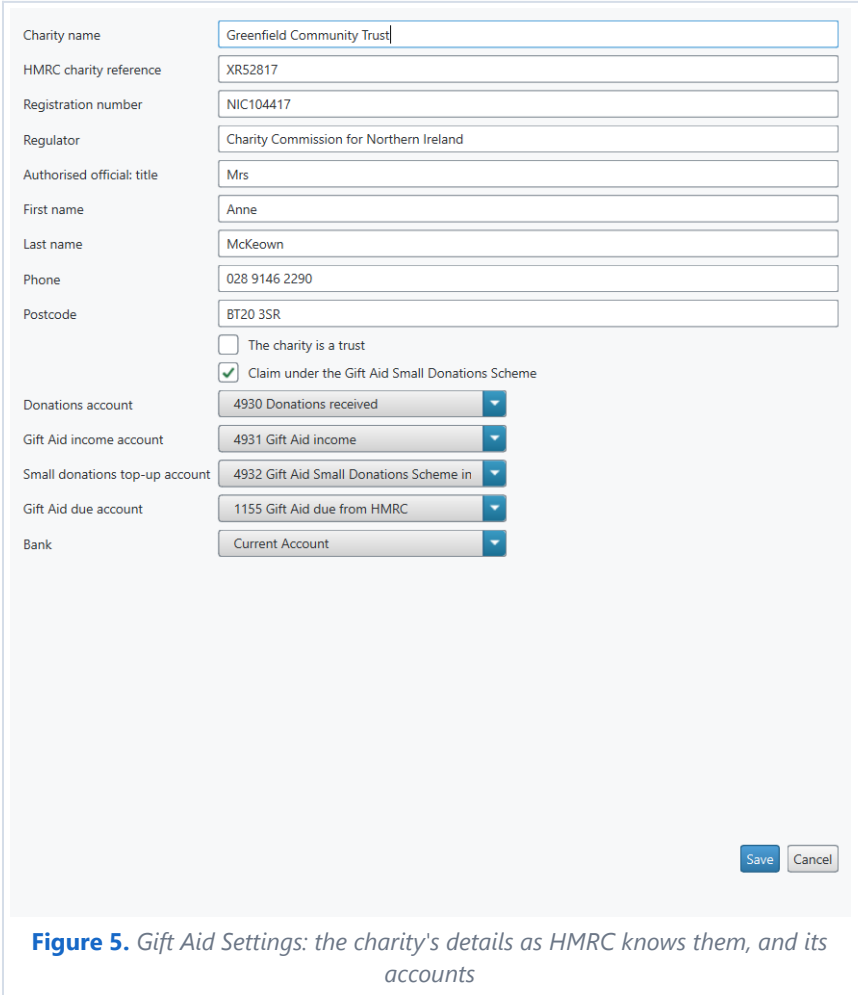
Collection tins and contactless readers bring in money from people whose names you never know, so they can't make declarations. The **Gift Aid Small Donations Scheme** (HMRC calls it GASDS) lets a charity claim a top-up on them anyway:

- each gift must be **cash or contactless, £30 or less**, and given in the UK;
- no declaration is needed;
- the top-up is the same **25%**, on up to **£8,000** of small gifts a tax year;
- but never on more than **10 times** the ordinary Gift Aid gifts the charity claims in the same tax year. A charity that claims £100 of ordinary Gift Aid gifts can claim the top-up on up to £1,000 of small gifts.

£97.25 of small gifts in the Demo Charity's tins	£24.31 the top-up HMRC pays on them (25%)	£45 the one gift too big for the scheme
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Setting up: Gift Aid Settings

Before the first claim, tell QuiSuite who the charity is. Open **Charity > Gift Aid Settings**.



Charity name: Greenfield Community Trust

HMRC charity reference: XR52817

Registration number: NIC104417

Regulator: Charity Commission for Northern Ireland

Authorised official: title: Mrs

First name: Anne

Last name: McKeown

Phone: 028 9146 2290

Postcode: BT20 3SR

☐ The charity is a trust

☒ Claim under the Gift Aid Small Donations Scheme

Donations account: 4930 Donations received

Gift Aid income account: 4931 Gift Aid income

Small donations top-up account: 4932 Gift Aid Small Donations Scheme in

Gift Aid due account: 1155 Gift Aid due from HMRC

Bank: Current Account

Save Cancel

Figure 5. *Gift Aid Settings: the charity's details as HMRC knows them, and its accounts*

The top half is the charity as HMRC knows it: its name, its **HMRC charity reference** (Greenfield's is XR52817), its registration number and regulator, and the **authorised official**, the person HMRC deals with about claims (Mrs Anne McKeown).

The charity is a trust changes the time limit for claims (see the warning on the last page). **Claim under the Gift Aid Small Donations Scheme** switches the collection-tin top-up on. Greenfield has it ticked.

The bottom half says where the money goes in the accounts. You set it once and never think about it again:

Account	What goes there
4930 Donations received	Every gift, when it is banked.
4931 Gift Aid income	The Gift Aid on a claim, when the claim goes to HMRC.

Account	What goes there
4932 Small Donations Scheme income	The collection-tin top-up on a claim.
1155 Gift Aid due from HMRC	What HMRC owes you, from the day you send the claim until HMRC pays it.
Bank: Current Account	Where gifts and HMRC's payments go in.

The dashboard

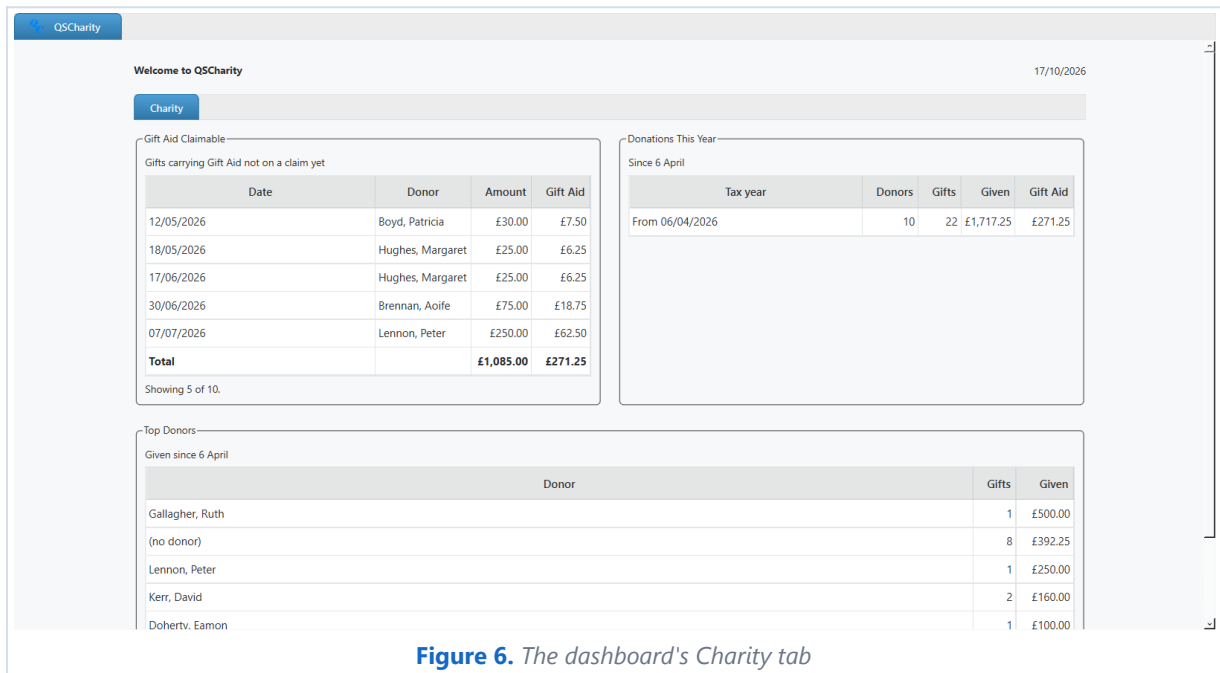


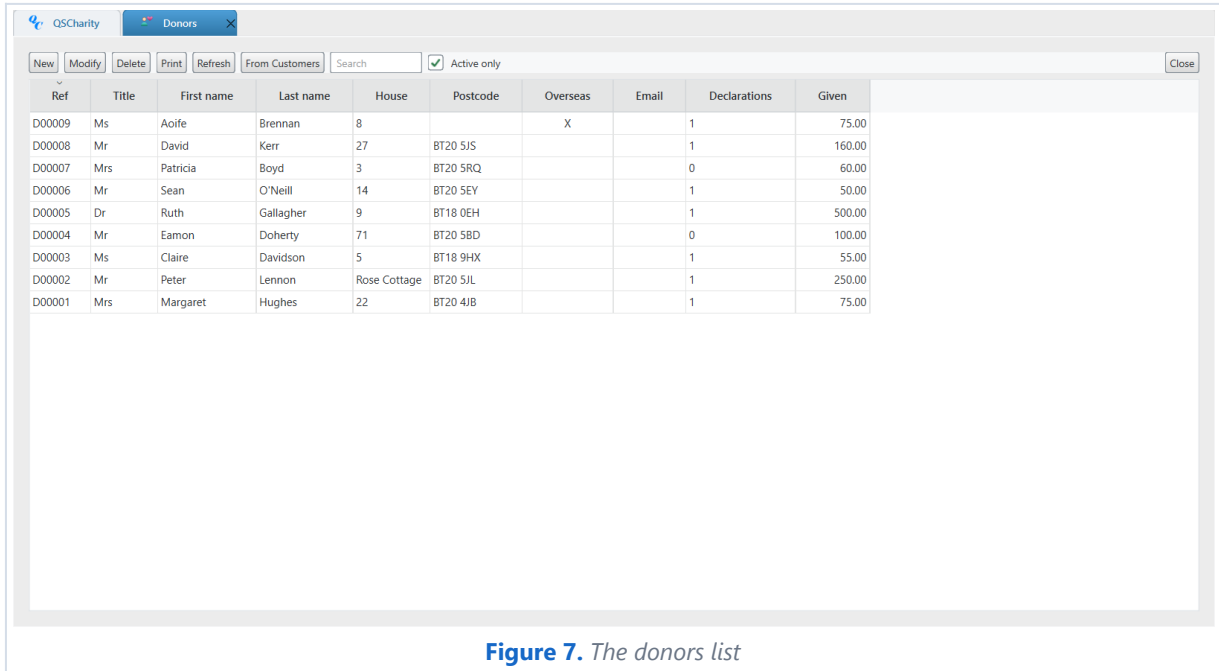
Figure 6. The dashboard's Charity tab

The dashboard is the first thing you see each day. It answers three questions:

- **Gift Aid Claimable:** which gifts carry Gift Aid but are not on a claim yet, and how much Gift Aid they will bring in. The oldest are at the top.
- **Donations This Year:** since 6 April, the start of the tax year: how many donors, how many gifts, how much given and the Gift Aid on it.
- **Top Donors:** who has given most this tax year. "(no donor)" is the collection tins.

Donors

A **donor** is someone who gives to the charity. Open **Charity > Donors**.



Ref	Title	First name	Last name	House	Postcode	Overseas	Email	Declarations	Given
D00009	Ms	Aoife	Brennan	8		X		1	75.00
D00008	Mr	David	Kerr	27	BT20 5JS			1	160.00
D00007	Mrs	Patricia	Boyd	3	BT20 5RQ			0	60.00
D00006	Mr	Sean	O'Neill	14	BT20 5EY			1	50.00
D00005	Dr	Ruth	Gallagher	9	BT18 0EH			1	500.00
D00004	Mr	Eamon	Doherty	71	BT20 5BD			0	100.00
D00003	Ms	Claire	Davidson	5	BT18 9HX			1	55.00
D00002	Mr	Peter	Lennon	Rose Cottage	BT20 5JL			1	250.00
D00001	Mrs	Margaret	Hughes	22	BT20 4JB			1	75.00

Figure 7. The donors list

Each row is one donor, with their reference (D00001 and so on, given automatically), their name, house and postcode as HMRC needs them, how many declarations they have made and how much they have given. Aoife Brennan has **Overseas** ticked: she lives outside the UK.

The buttons along the top are the same in every QuiSuite list: **New** adds a donor, **Modify** opens the one selected (or double-click it), **Delete**, **Print** and **Refresh**. Type in **Search** to find a donor by any part of their name or postcode. **From Customers** turns customers marked "Gift Aid declared" in the accounts (from a Sage import, say) into donors, with their declarations.

Donor (as HMRC needs it)

Reference: D00001

Title: Mrs

First name: Margaret

Last name: Hughes

House name or number: 22

Postcode: BT20 4JB

Lives overseas: ☐

Contact

Address: 22 Abbey Street

Town: Bangor

Email:

Phone:

Customer: (none)

Active: ☒

Save Close

Figure 8. Margaret Hughes's donor record

A donor's record has two halves. **Donor (as HMRC needs it)** holds exactly what goes on HMRC's schedule: title (up to 4 letters), first name, last name, **house name or number** (just the number: HMRC does not want the street) and postcode. **Contact** holds the rest of the address, email and phone, and links the donor to a customer account if they have one.

Donor Notes Declarations Gifts

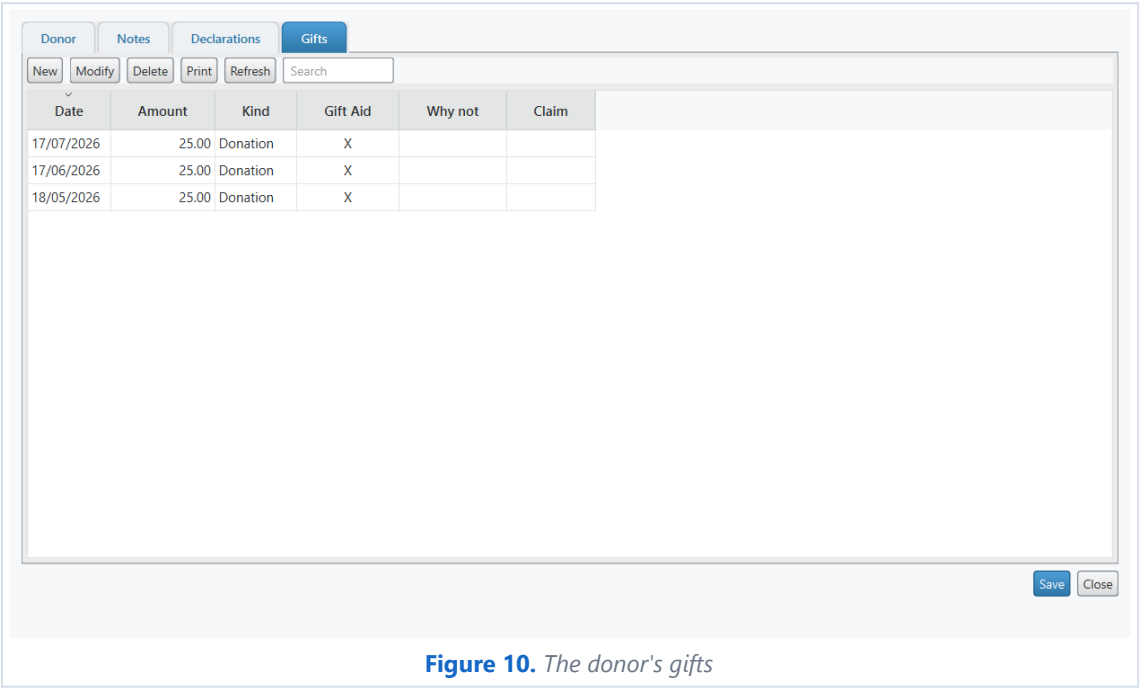
New Modify Delete Print Refresh Search

Date	How	Past gifts	Future gifts	Cancelled
15/02/2026	Written	X	X	

Save Close

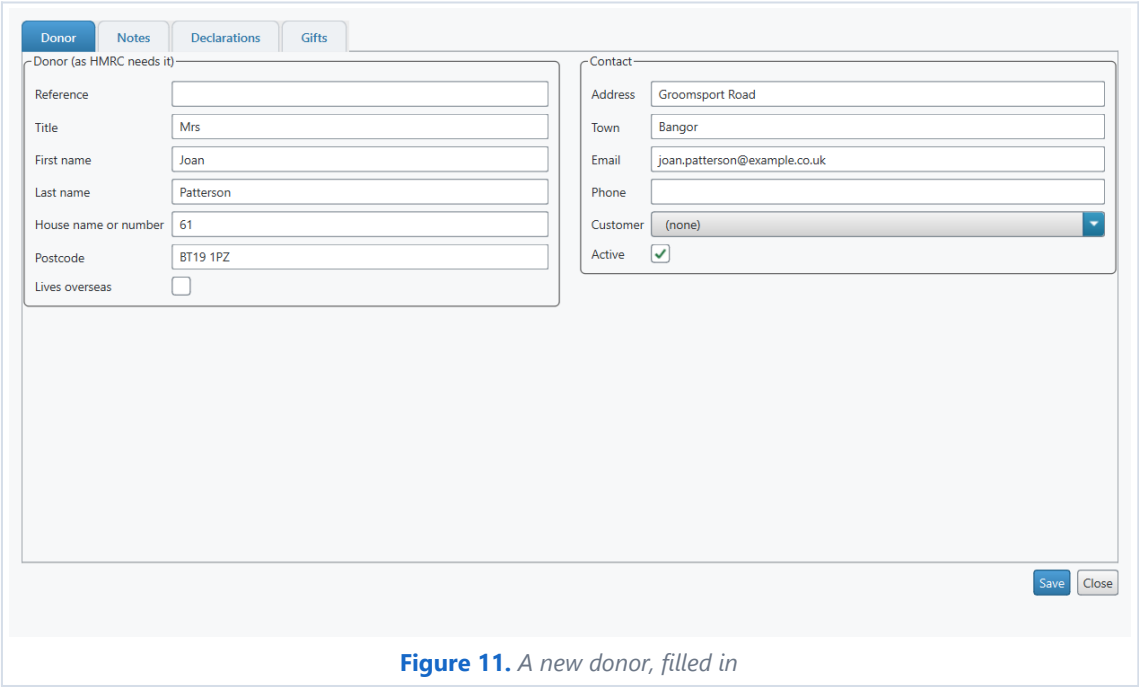
Figure 9. The donor's declarations

The **Declarations** tab lists the Gift Aid declarations this donor has made. Mrs Hughes made a written one on 15 February 2026, covering both the past 4 years and the future.



The **Gifts** tab lists everything they have given, with a tick where the gift carries Gift Aid, and the reason where it does not.

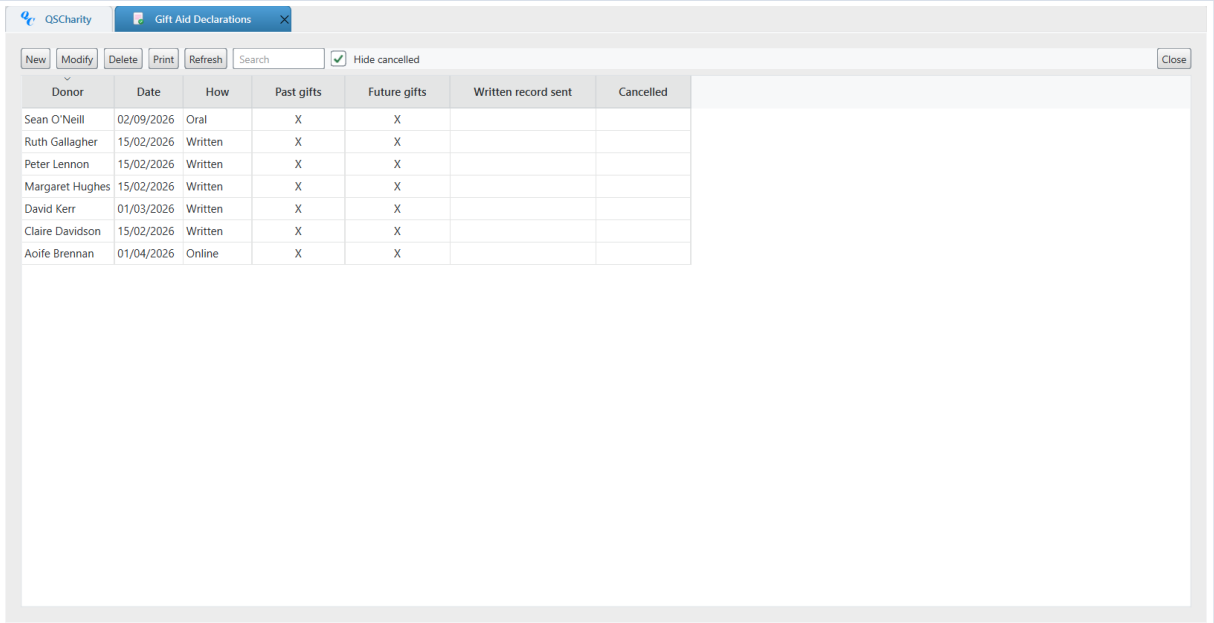
Adding a donor



Press **New** in the donors list and fill in the donor's details. Here Mrs Joan Patterson of 61 Groomsport Road is being added. The reference is given when you press **Save**. Once a donor is saved, the Declarations and Gifts tabs appear, ready for their first declaration.

Gift Aid declarations

No declaration, no Gift Aid. Open **Charity > Gift Aid Declarations**.

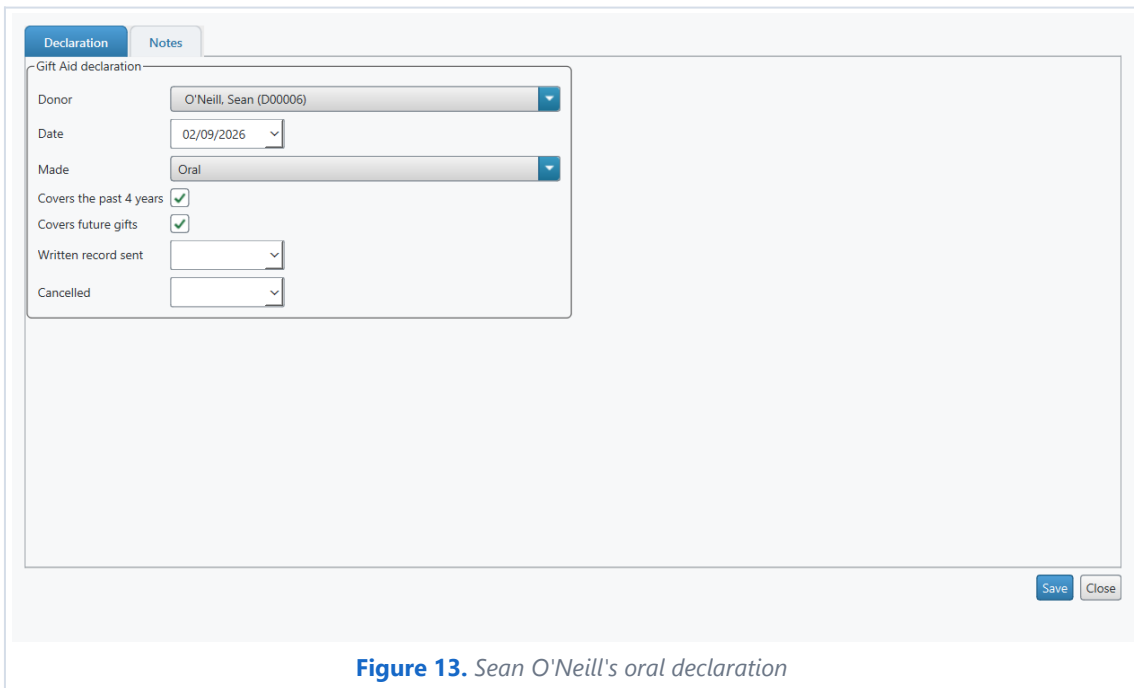


Donor	Date	How	Past gifts	Future gifts	Written record sent	Cancelled
Sean O'Neill	02/09/2026	Oral	X	X		
Ruth Gallagher	15/02/2026	Written	X	X		
Peter Lennon	15/02/2026	Written	X	X		
Margaret Hughes	15/02/2026	Written	X	X		
David Kerr	01/03/2026	Written	X	X		
Claire Davidson	15/02/2026	Written	X	X		
Aoife Brennan	01/04/2026	Online	X	X		

Figure 12. The Gift Aid declarations

Each row is a declaration: who made it, when, how (**Written**, **Oral** or **Online**), whether it covers past gifts and future gifts, when a written record was sent and when it was cancelled. **Hide cancelled** is ticked, so Patricia Boyd's cancelled declaration is not shown. Untick it to see every declaration ever made: HMRC can ask to see them.

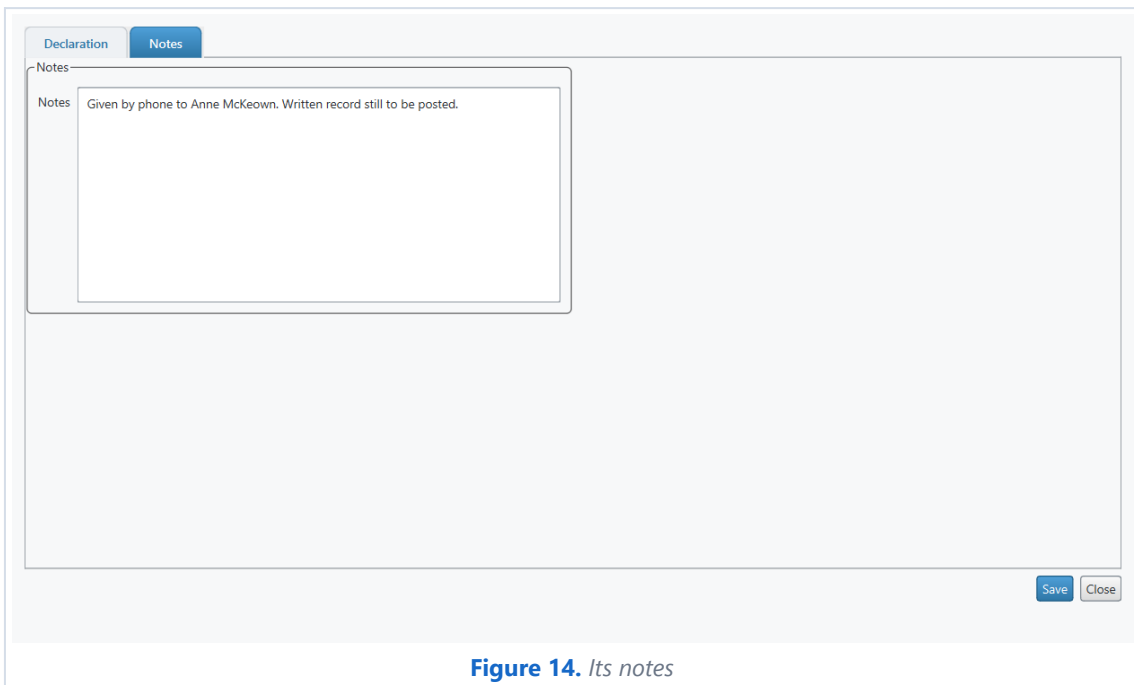
An oral declaration



The screenshot shows the 'Declaration' tab in the QuiSuite system. The 'Gift Aid declaration' section is active. The 'Donor' field is set to 'O'Neill, Sean (D00006)'. The 'Date' field is set to '02/09/2026'. The 'Made' field is set to 'Oral'. The 'Covers the past 4 years' checkbox is checked. The 'Covers future gifts' checkbox is checked. The 'Written record sent' field is empty. The 'Cancelled' field is empty. At the bottom right, there are 'Save' and 'Close' buttons.

Figure 13. Sean O'Neill's oral declaration

Sean O'Neill gave his declaration over the phone on 2 September. An oral declaration is perfectly good, but HMRC says it only counts once the charity has sent the donor a **written record** of it. **Written record sent** is still empty, so his £50 gift carries no Gift Aid yet.



The screenshot shows the 'Notes' tab in the QuiSuite system. The 'Notes' field contains the text: 'Given by phone to Anne McKeown. Written record still to be posted.' At the bottom right, there are 'Save' and 'Close' buttons.

Figure 14. Its notes

The **Notes** tab says who took the call. Fill in **Written record sent** on the day the letter goes, and his gift then carries Gift Aid.

Adding a declaration, and the 4 years before it

Declaration | Notes

Gift Aid declaration

Donor: Doherty, Eamon (D00004)

Date: 17/10/2026

Made: Written

Covers the past 4 years: ☒

Covers future gifts: ☒

Written record sent:

Cancelled:

Save Close

Figure 15. Eamon Doherty's new declaration, covering the past 4 years

Eamon Doherty gave £100 on 31 August, but had never made a declaration. Today he signs one at the coffee morning. Press **New**, choose him as the donor, leave the date as today, choose **Written** and leave **Covers the past 4 years** ticked. Press **Save**.

Date	Donor	Amount	Kind	How	Gift Aid	Gift Aid value	Why not	Sponsored	Claim
12/10/2026	(no donor)	26.00	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
06/10/2026	(no donor)	8.00	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme		
05/10/2026	(no donor)	12.50	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
03/10/2026	(no donor)	45.00	Small cash	Cash		0.00	Over £30: too large for the Small Donations Scheme.		
01/10/2026	David Kerr	100.00	Donation	Bank transfer	X	25.00			
28/09/2026	(no donor)	9.60	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme		
25/09/2026	Ruth Gallagher	500.00	Donation	Bank transfer	X	125.00			
21/09/2026	(no donor)	22.75	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
20/09/2026	David Kerr	60.00	Donation	Card		0.00	The donor's benefit (40.00) is more than HMRC allows for a gift of 60.00 (15.00).		
15/09/2026	Claire Davidson	15.00	Donation	Card	X	3.75			
14/09/2026	(no donor)	18.40	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
10/09/2026	Sean O'Neill	50.00	Donation	Bank transfer		0.00	No Gift Aid declaration covers this date.		
05/09/2026	(no donor)	250.00	Donation	Cheque		0.00	Given by a company: a company gets tax relief its own way, not through Gift Aid.		
31/08/2026	Eamon Doherty	100.00	Donation	Bank transfer	X	25.00			
16/08/2026	Claire Davidson	40.00	Sponsored	Online	X	10.00		X	
12/08/2026	Patricia Boyd	30.00	Donation	Cheque		0.00	No Gift Aid declaration covers this date.		
17/07/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			
07/07/2026	Peter Lennon	250.00	Donation	Cheque	X	62.50			
30/06/2026	Aoife Brennan	75.00	Donation	Online	X	18.75			
17/06/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			
18/05/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			
12/05/2026	Patricia Boyd	30.00	Donation	Cheque	X	7.50			

Figure 16. Eamon Doherty's August gift now carries £25 of Gift Aid

As soon as the declaration is saved, QuiSuite checks his gifts again. His August gift (highlighted) is now ticked for Gift Aid, worth **£25**, and its "Why not" has gone. A declaration that covers the past reaches back to gifts made up to 4 years before it.



Every gift, whoever gave it. Open **Charity > Gifts**.

OSCharity Gifts										
New Modify Delete Print Refresh Bank Check Again Search ☐ Not yet claimed										
Date	Donor	Amount	Kind	How	Gift Aid	Gift Aid value	Why not	Sponsored	Claim	
12/10/2026	(no donor)	26.00	Small cash	Cash		0.00	Gift Aid Small Donations Scheme			
06/10/2026	(no donor)	8.00	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme			
05/10/2026	(no donor)	12.50	Small cash	Cash		0.00	Gift Aid Small Donations Scheme			
03/10/2026	(no donor)	45.00	Small cash	Cash		0.00	Over £30: too large for the Small Donations Scheme.			
01/10/2026	David Kerr	100.00	Donation	Bank transfer	X	25.00				
28/09/2026	(no donor)	9.60	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme			
25/09/2026	Ruth Gallagher	500.00	Donation	Bank transfer	X	125.00				
21/09/2026	(no donor)	22.75	Small cash	Cash		0.00	Gift Aid Small Donations Scheme			
20/09/2026	David Kerr	60.00	Donation	Card		0.00	The donor's benefit (40.00) is more than HMRC allows for a gift of 60.00 (15.00).			
15/09/2026	Claire Davidson	15.00	Donation	Card	X	3.75				
14/09/2026	(no donor)	18.40	Small cash	Cash		0.00	Gift Aid Small Donations Scheme			
10/09/2026	Sean O'Neill	50.00	Donation	Bank transfer		0.00	No Gift Aid declaration covers this date.			
05/09/2026	(no donor)	250.00	Donation	Cheque		0.00	Given by a company: a company gets tax relief its own way, not through Gift Aid.			
31/08/2026	Eamon Doherty	100.00	Donation	Bank transfer		0.00	No Gift Aid declaration covers this date.			
16/08/2026	Claire Davidson	40.00	Sponsored	Online	X	10.00		X		
12/08/2026	Patricia Boyd	30.00	Donation	Cheque		0.00	No Gift Aid declaration covers this date.			
17/07/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25				
07/07/2026	Peter Lennon	250.00	Donation	Cheque	X	62.50				
30/06/2026	Aoife Brennan	75.00	Donation	Online	X	18.75				
17/06/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25				
18/05/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25				
12/05/2026	Patricia Boyd	30.00	Donation	Cheque	X	7.50				

Figure 17. The gifts: which carry Gift Aid, and why not

This is the most useful list in QuiSuite Charity. Each gift shows its date, donor, amount, kind and how it was given. The **Gift Aid** column is ticked when it carries Gift Aid, **Gift Aid value** shows how much, and **Why not** says, in plain words, why a gift carries none. Every rule from the "Gift Aid in plain English" chapter is here:

- **No Gift Aid declaration covers this date:** Sean O'Neill (his oral declaration has no written record yet), Patricia Boyd in August (cancelled) and, at this point, Eamon Doherty.
- **The donor's benefit is more than HMRC allows:** David Kerr's gala dinner ticket.
- **Given by a company:** Harbourside Building Supplies Ltd.
- **Gift Aid Small Donations Scheme:** the collection tins, claimed through the scheme instead.
- **Over £30: too large for the Small Donations Scheme:** the one £45 cash gift.

Check Again checks every unclaimed gift against the rules again; QuiSuite does it for you whenever a declaration changes. **Not yet claimed** shows only gifts not on a claim yet.

Why the gala dinner ticket carries no Gift Aid

GiftNotes

Gift

Donor

Kerr, David (D00008)

Date

20/09/2026

Amount

60.00

Kind

Donation

How

Card

Sponsored event

☐

Benefit to donor

40.00

From a company

☐

Banking

Bank

(none)

Income account

(none)

Gift Aid

The donor's benefit (40.00) is more than HMRC allows for a gift of 60.00 (15.00).

Save

Close

Figure 18. David Kerr's gala dinner ticket

David Kerr paid £60 for a gala dinner ticket. **Benefit to donor** is £40, what the meal is worth. HMRC lets a donor have back at most 25% of a gift of £100 or less, which on £60 is £15. £40 is more than that, so on the right, under **Gift Aid**, QuiSuite explains that the gift carries none.

A company's gift

GiftNotes

Gift

Donor

(none)

Date

05/09/2026

Amount

250.00

Kind

Donation

How

Cheque

Sponsored event

☐

Benefit to donor

0.00

From a company

☒

Banking

Bank

(none)

Income account

(none)

Gift Aid

Given by a company: a company gets tax relief its own way, not through Gift Aid.

Save

Close

Figure 19. A company's gift, and why it carries no Gift Aid

Harbourside Building Supplies Ltd matched its staff's fundraising with £250. **From a company** is ticked, so there is no donor and no Gift Aid. The company claims tax relief on it in its own accounts instead.

Recording a gift

The screenshot shows the 'Recording a gift' form in QuiSuite. The form is divided into two tabs: 'Gift' and 'Notes'. The 'Gift' tab is selected. It contains two main sections: 'Gift' and 'Banking'.

Gift Section:

- Donor: Hughes, Margaret (D00001)
- Date: 17/10/2026
- Amount: 25.00
- Kind: Donation
- How: Standing Order
- Sponsored event: ☐
- Benefit to donor: 0.00
- From a company: ☐

Banking Section:

- Bank: (none)
- Income account: (none)
- Gift Aid: (worked out when saved)

At the bottom right of the form are two buttons: 'Save' and 'Close'.

Figure 20. Recording a gift

Press **New** in the gifts list. Choose the **Donor** (leave it empty for an anonymous cash gift), the **Date**, the **Amount**, the **Kind** (Donation, Membership, Sponsored, or Small cash for the collection tin) and **How** it was given. Fill in **Benefit to donor** only when they got something back. Press **Save**: QuiSuite decides at once whether it carries Gift Aid, and shows why not if it does not.

Banking a gift

QCharity Gifts

New Modify Delete Print Refresh Bank Check Again Search Not yet claimed Close

Banked: a bank receipt is posted.

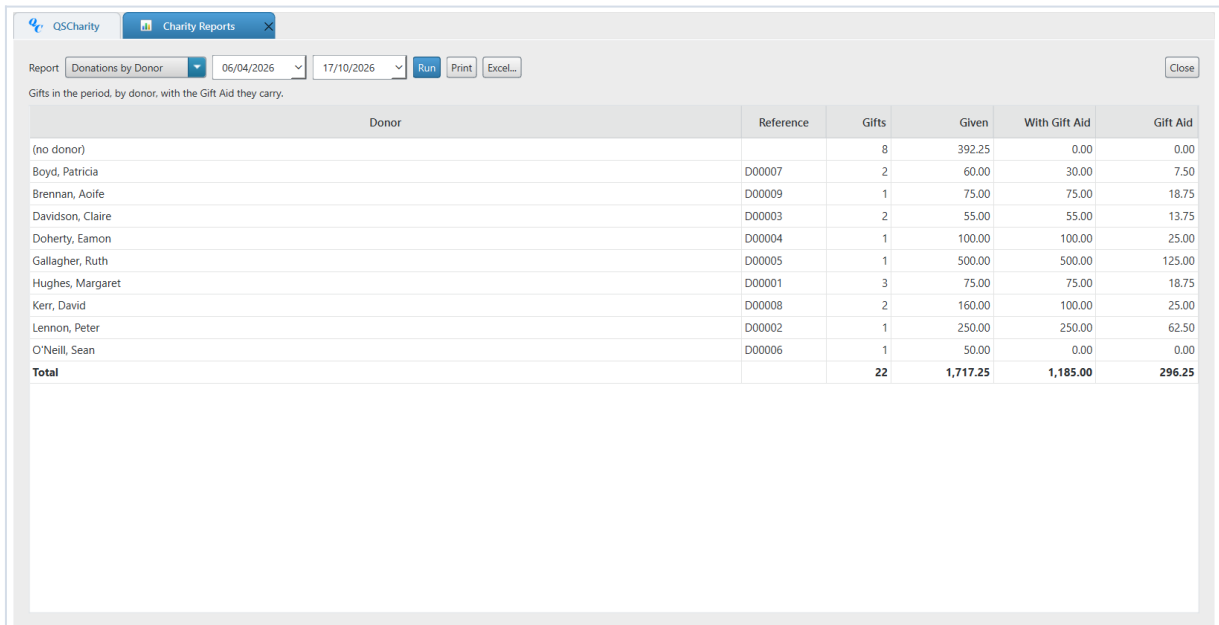
Date	Donor	Amount	Kind	How	Gift Aid	Gift Aid value	Why not	Sponsored	Claim
12/10/2026	(no donor)	26.00	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
06/10/2026	(no donor)	8.00	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme		
05/10/2026	(no donor)	12.50	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
03/10/2026	(no donor)	45.00	Small cash	Cash		0.00	Over £30: too large for the Small Donations Scheme.		
01/10/2026	David Kerr	100.00	Donation	Bank transfer	X	25.00			
28/09/2026	(no donor)	9.60	Small cash	Contactless		0.00	Gift Aid Small Donations Scheme		
25/09/2026	Ruth Gallagher	500.00	Donation	Bank transfer	X	125.00			
21/09/2026	(no donor)	22.75	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
20/09/2026	David Kerr	60.00	Donation	Card		0.00	The donor's benefit (40.00) is more than HMRC allows for a gift of 60.00 (15.00).		
15/09/2026	Claire Davidson	15.00	Donation	Card	X	3.75			
14/09/2026	(no donor)	18.40	Small cash	Cash		0.00	Gift Aid Small Donations Scheme		
10/09/2026	Sean O'Neill	50.00	Donation	Bank transfer		0.00	No Gift Aid declaration covers this date.		
05/09/2026	(no donor)	250.00	Donation	Cheque		0.00	Given by a company: a company gets tax relief its own way, not through Gift Aid.		
31/08/2026	Eamon Doherty	100.00	Donation	Bank transfer	X	25.00			
16/08/2026	Claire Davidson	40.00	Sponsored	Online	X	10.00		X	
12/08/2026	Patricia Boyd	30.00	Donation	Cheque		0.00	No Gift Aid declaration covers this date.		
17/07/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			
07/07/2026	Peter Lennon	250.00	Donation	Cheque	X	62.50			
06/06/2026	Aoife Brennan	75.00	Donation	Online	X	18.75			
17/06/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			
18/05/2026	Margaret Hughes	25.00	Donation	Standing Order	X	6.25			

Figure 21. A gift banked

Select a gift and press **Bank** when the money goes into the bank: QuiSuite posts a **bank receipt** to the Current Account and the donations account (4930), and says so at the top. Here Aoife Brennan's £75 has been banked. Standing orders and Direct Debits can be banked the same way when they appear on the bank statement.

Reports

Open **Charity > Charity Reports**, choose a report and the dates, and press **Run**. **Print** prints it and **Excel...** saves it as a spreadsheet. The dates start at 6 April, the start of the tax year.



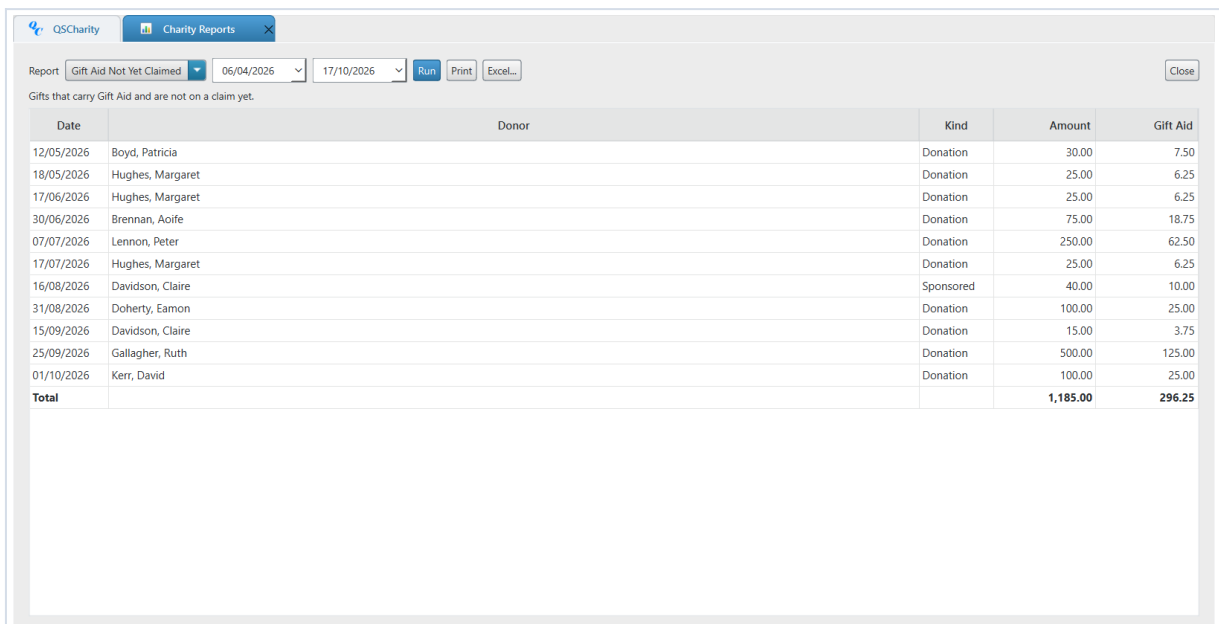
Report: Donations by Donor 06/04/2026 17/10/2026 Run Print Excel... Close

Gifts in the period, by donor, with the Gift Aid they carry.

Donor	Reference	Gifts	Given	With Gift Aid	Gift Aid
(no donor)		8	392.25	0.00	0.00
Boyd, Patricia	D00007	2	60.00	30.00	7.50
Brennan, Aoife	D00009	1	75.00	75.00	18.75
Davidson, Claire	D00003	2	55.00	55.00	13.75
Doherty, Eamon	D00004	1	100.00	100.00	25.00
Gallagher, Ruth	D00005	1	500.00	500.00	125.00
Hughes, Margaret	D00001	3	75.00	75.00	18.75
Kerr, David	D00008	2	160.00	100.00	25.00
Lennon, Peter	D00002	1	250.00	250.00	62.50
O'Neill, Sean	D00006	1	50.00	0.00	0.00
Total		22	1,717.25	1,185.00	296.25

Figure 22. Donations by Donor

Donations by Donor: each donor's gifts in the period, how much of it carries Gift Aid and the Gift Aid on it. Greenfield has been given £1,717.25 this tax year, £1,185 of it with Gift Aid worth **£296.25**.



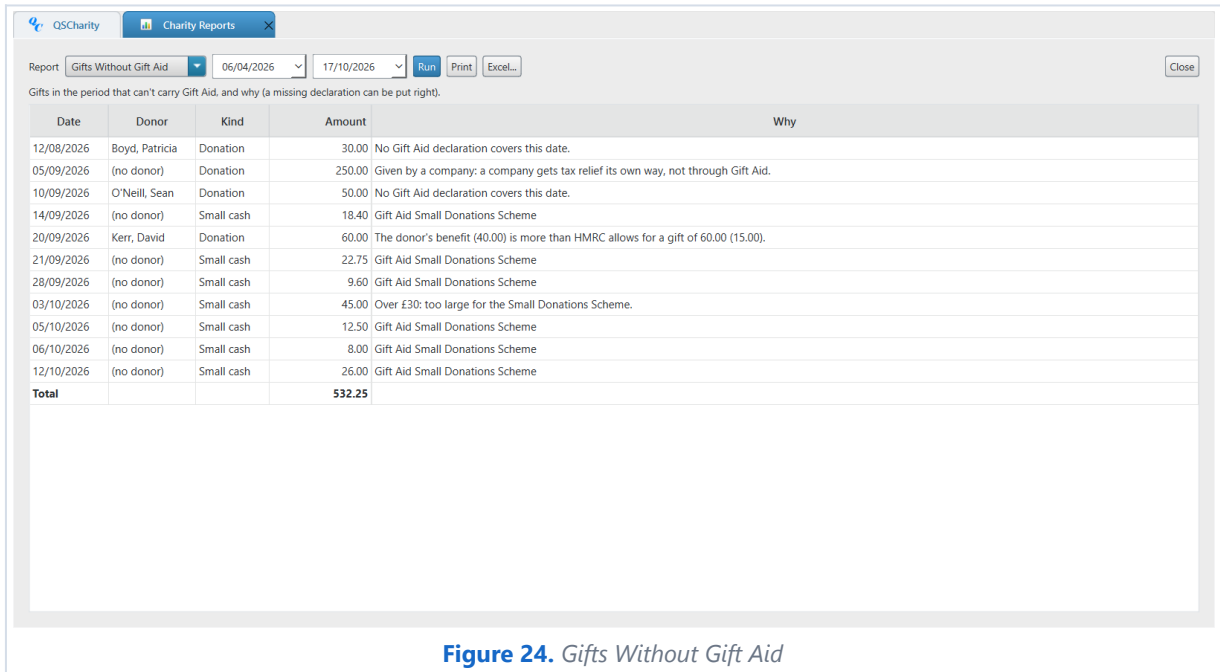
Report: Gift Aid Not Yet Claimed 06/04/2026 17/10/2026 Run Print Excel... Close

Gifts that carry Gift Aid and are not on a claim yet.

Date	Donor	Kind	Amount	Gift Aid
12/05/2026	Boyd, Patricia	Donation	30.00	7.50
18/05/2026	Hughes, Margaret	Donation	25.00	6.25
17/06/2026	Hughes, Margaret	Donation	25.00	6.25
30/06/2026	Brennan, Aoife	Donation	75.00	18.75
07/07/2026	Lennon, Peter	Donation	250.00	62.50
17/07/2026	Hughes, Margaret	Donation	25.00	6.25
16/08/2026	Davidson, Claire	Sponsored	40.00	10.00
31/08/2026	Doherty, Eamon	Donation	100.00	25.00
15/09/2026	Davidson, Claire	Donation	15.00	3.75
25/09/2026	Gallagher, Ruth	Donation	500.00	125.00
01/10/2026	Kerr, David	Donation	100.00	25.00
Total			1,185.00	296.25

Figure 23. Gift Aid Not Yet Claimed

Gift Aid Not Yet Claimed: the gifts that carry Gift Aid and are waiting to be claimed. This is what the next claim will hold: 11 gifts, £1,185, Gift Aid £296.25.



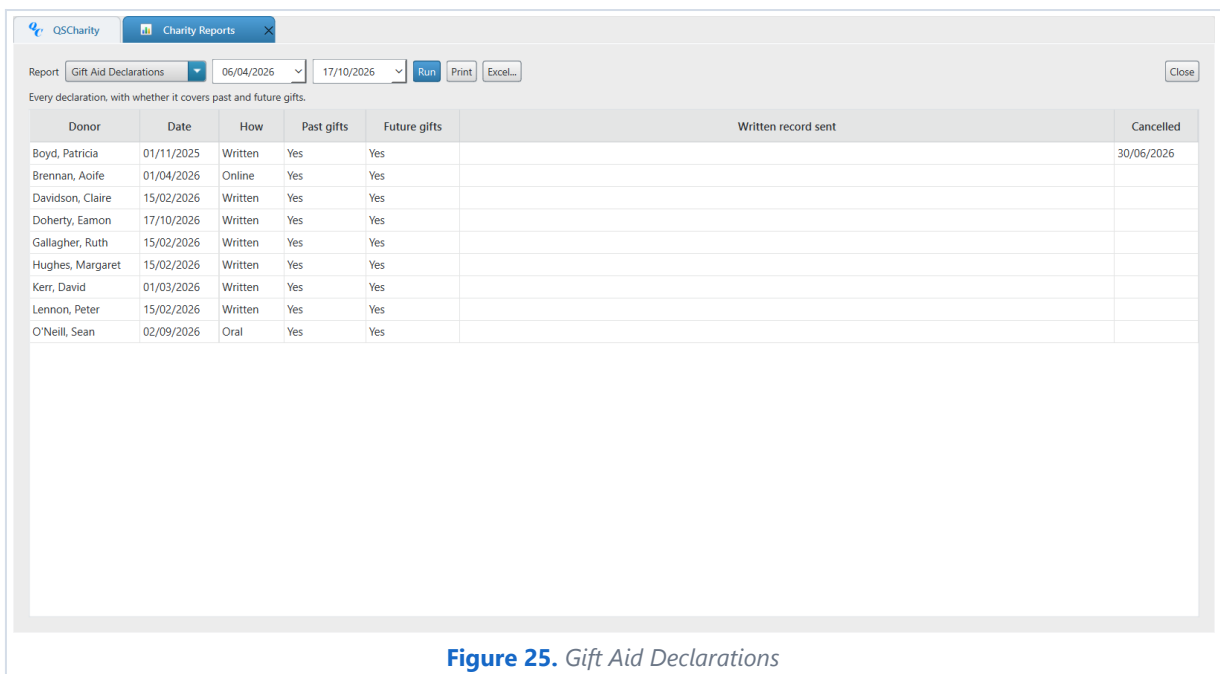
Report: Gifts Without Gift Aid 06/04/2026 17/10/2026 Run Print Excel... Close

Gifts in the period that can't carry Gift Aid, and why (a missing declaration can be put right).

Date	Donor	Kind	Amount	Why
12/08/2026	Boyd, Patricia	Donation	30.00	No Gift Aid declaration covers this date.
05/09/2026	(no donor)	Donation	250.00	Given by a company: a company gets tax relief its own way, not through Gift Aid.
10/09/2026	O'Neill, Sean	Donation	50.00	No Gift Aid declaration covers this date.
14/09/2026	(no donor)	Small cash	18.40	Gift Aid Small Donations Scheme
20/09/2026	Kerr, David	Donation	60.00	The donor's benefit (40.00) is more than HMRC allows for a gift of 60.00 (15.00).
21/09/2026	(no donor)	Small cash	22.75	Gift Aid Small Donations Scheme
28/09/2026	(no donor)	Small cash	9.60	Gift Aid Small Donations Scheme
03/10/2026	(no donor)	Small cash	45.00	Over £30: too large for the Small Donations Scheme.
05/10/2026	(no donor)	Small cash	12.50	Gift Aid Small Donations Scheme
06/10/2026	(no donor)	Small cash	8.00	Gift Aid Small Donations Scheme
12/10/2026	(no donor)	Small cash	26.00	Gift Aid Small Donations Scheme
Total			532.25	

Figure 24. Gifts Without Gift Aid

Gifts Without Gift Aid: every gift that cannot carry Gift Aid, and why. Read it before each claim: a missing declaration can often be put right with a phone call and a letter.



Report: Gift Aid Declarations 06/04/2026 17/10/2026 Run Print Excel... Close

Every declaration, with whether it covers past and future gifts.

Donor	Date	How	Past gifts	Future gifts	Written record sent	Cancelled
Boyd, Patricia	01/11/2025	Written	Yes	Yes		30/06/2026
Brennan, Aoife	01/04/2026	Online	Yes	Yes		
Davidson, Claire	15/02/2026	Written	Yes	Yes		
Doherty, Eamon	17/10/2026	Written	Yes	Yes		
Gallagher, Ruth	15/02/2026	Written	Yes	Yes		
Hughes, Margaret	15/02/2026	Written	Yes	Yes		
Kerr, David	01/03/2026	Written	Yes	Yes		
Lennon, Peter	15/02/2026	Written	Yes	Yes		
O'Neill, Sean	02/09/2026	Oral	Yes	Yes		

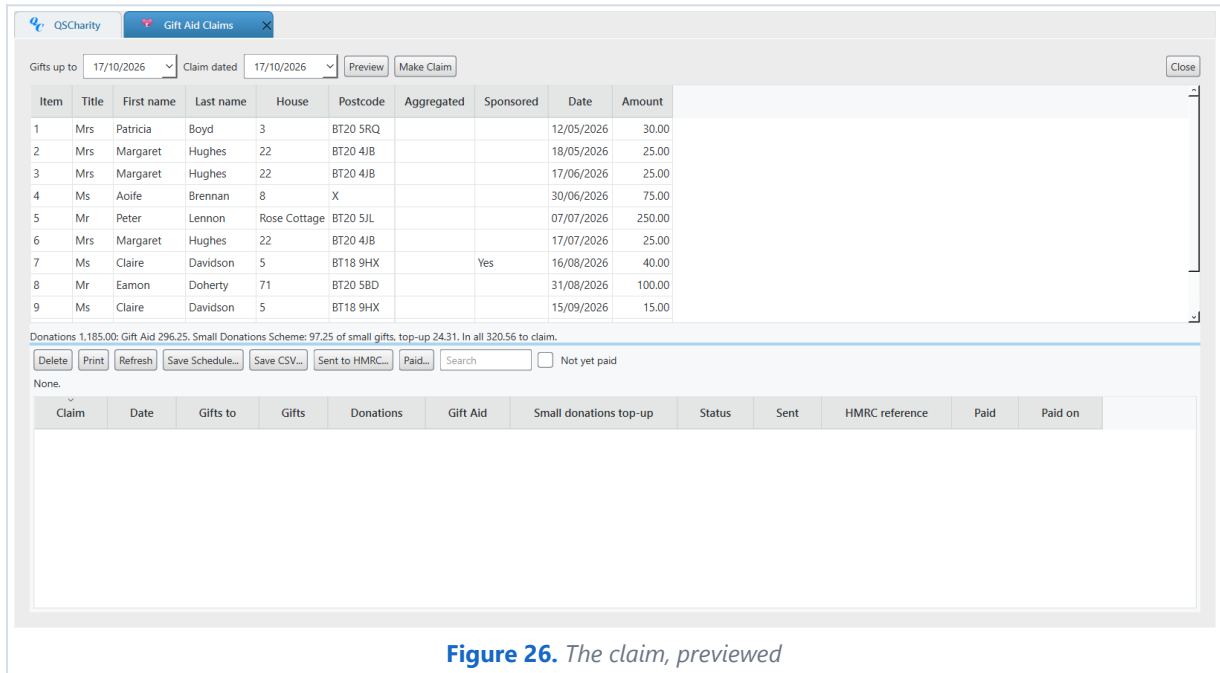
Figure 25. Gift Aid Declarations

Gift Aid Declarations: every declaration on file, with how it was made and what it covers. Keep it for HMRC: they can ask to see the declaration behind any gift claimed.

Claiming from HMRC

A claim gathers up every gift that carries Gift Aid and has not been claimed, and the Small Donations Scheme top-up, into one claim to HMRC. Most charities claim every month or every quarter. Open **Charity > Gift Aid Claims**.

1. Preview the claim



Gifts up to 17/10/2026 Claim dated 17/10/2026 Preview Make Claim Close

Item	Title	First name	Last name	House	Postcode	Aggregated	Sponsored	Date	Amount
1	Mrs	Patricia	Boyd	3	BT20 5RQ			12/05/2026	30.00
2	Mrs	Margaret	Hughes	22	BT20 4JB			18/05/2026	25.00
3	Mrs	Margaret	Hughes	22	BT20 4JB			17/06/2026	25.00
4	Ms	Aoife	Brennan	8	X			30/06/2026	75.00
5	Mr	Peter	Lennon	Rose Cottage	BT20 5JL			07/07/2026	250.00
6	Mrs	Margaret	Hughes	22	BT20 4JB			17/07/2026	25.00
7	Ms	Claire	Davidson	5	BT18 9HX		Yes	16/08/2026	40.00
8	Mr	Eamon	Doherty	71	BT20 5BD			31/08/2026	100.00
9	Ms	Claire	Davidson	5	BT18 9HX			15/09/2026	15.00

Donations 1,185.00: Gift Aid 296.25. Small Donations Scheme: 97.25 of small gifts, top-up 24.31. In all 320.56 to claim.

Delete Print Refresh Save Schedule... Save CSV... Sent to HMRC... Paid... Search ☐ Not yet paid

None.

Claim	Date	Gifts to	Gifts	Donations	Gift Aid	Small donations top-up	Status	Sent	HMRC reference	Paid	Paid on
None.											

Figure 26. The claim, previewed

The window opens with a **preview**: the gifts up to the date at the top, laid out exactly as HMRC's schedule wants them: title, first name, last name, house, postcode (X for Aoife Brennan, who lives overseas), whether it was a sponsored event, the date and the amount. Underneath, QuiSuite adds it up:

£296.25 Gift Aid on £1,185 of gifts	£24.31 Small Donations top-up on £97.25	£320.56 in all to claim from HMRC
--	--	--

Nothing is saved by a preview. Change **Gifts up to** and press **Preview** to see a different claim.

2. Make the claim

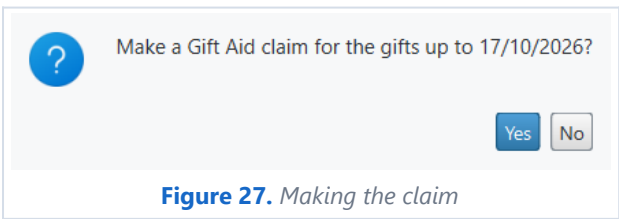


Figure 27. Making the claim

Press **Make Claim** and answer **Yes**. The claim is recorded as **GA00001** and its gifts are taken: they can't go on another claim by mistake.

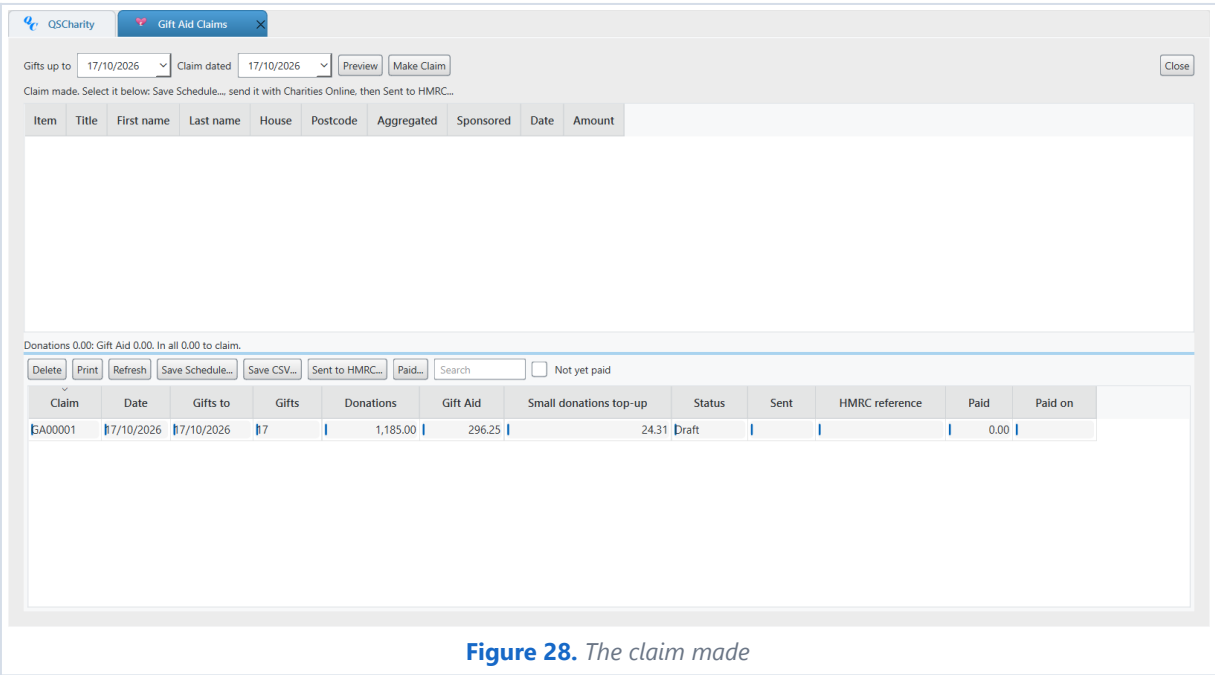
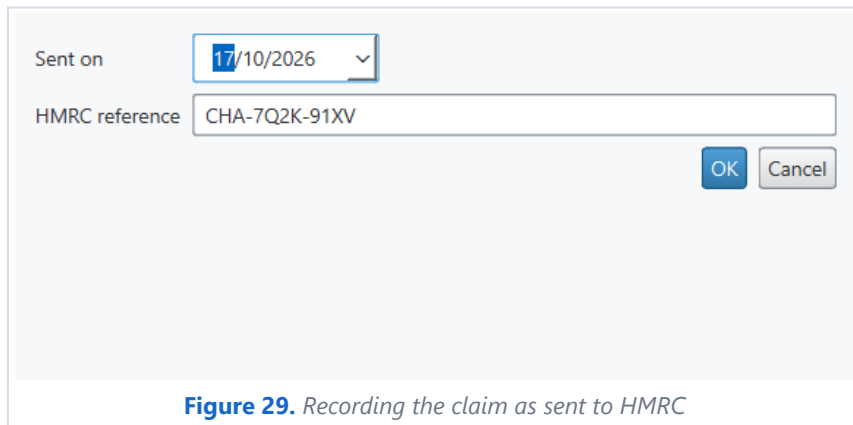


Figure 28. The claim made

The claim appears in the list at the bottom, as a **Draft**: 17 gifts (11 with Gift Aid and 6 small gifts), £1,185 of donations, £296.25 of Gift Aid and a £24.31 top-up. Select it and press **Save Schedule...** to save HMRC's schedule spreadsheet (or **Save CSV...** to paste into HMRC's own template), then log in to **Charities Online** and send it.

3. Record it as sent



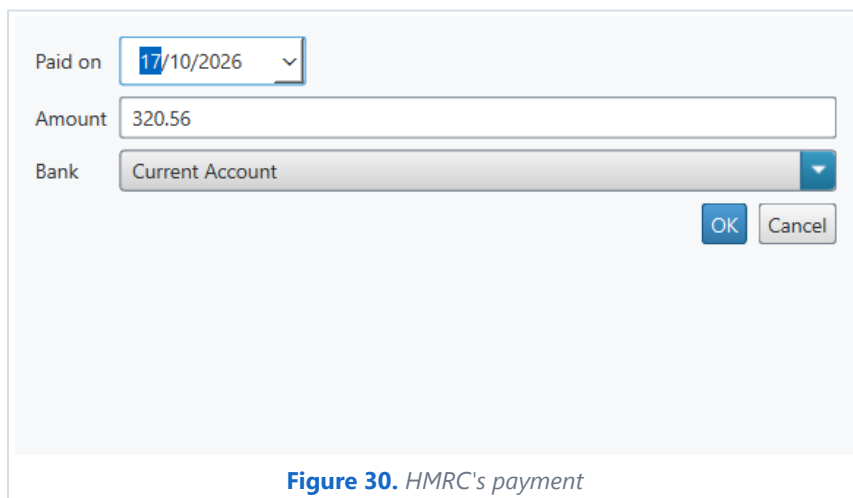
Sent on

HMRC reference

Figure 29. Recording the claim as sent to HMRC

When Charities Online has taken the claim, press **Sent to HMRC...**, give the date and the reference HMRC gave you (here CHA-7Q2K-91XV), and press **OK**. QuiSuite posts the claim to the accounts: HMRC now owes the charity £320.56 (account 1155), and the Gift Aid and top-up are income (4931 and 4932).

4. Record HMRC's payment



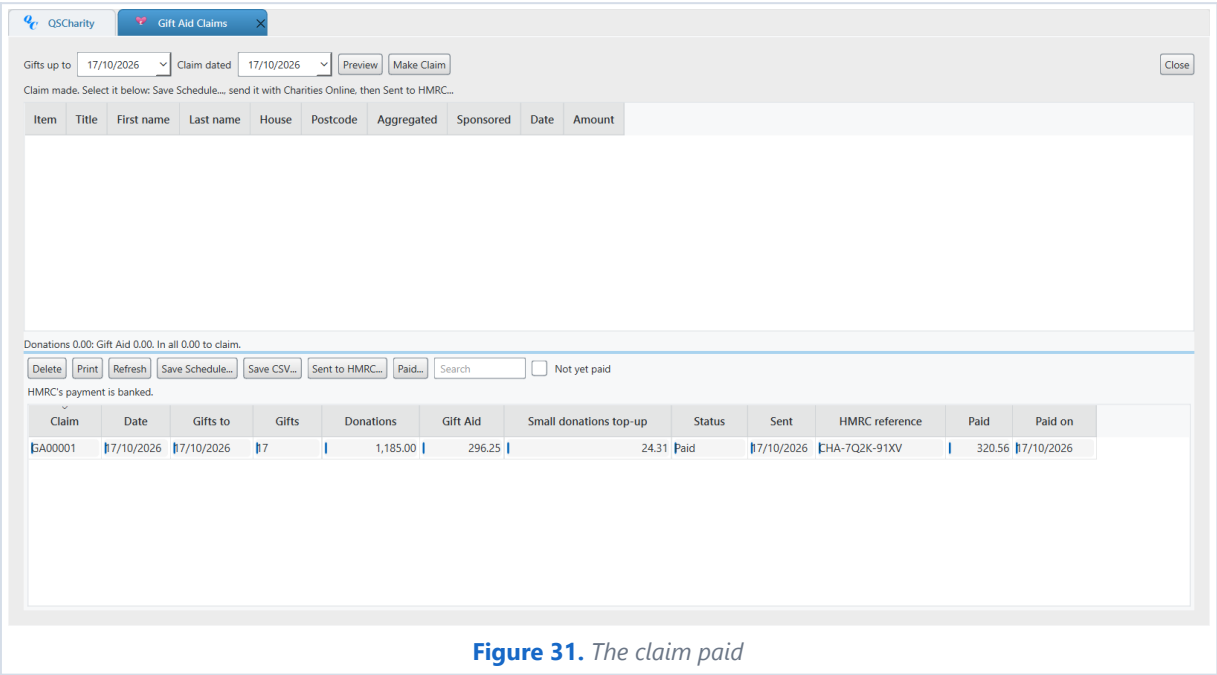
Paid on

Amount

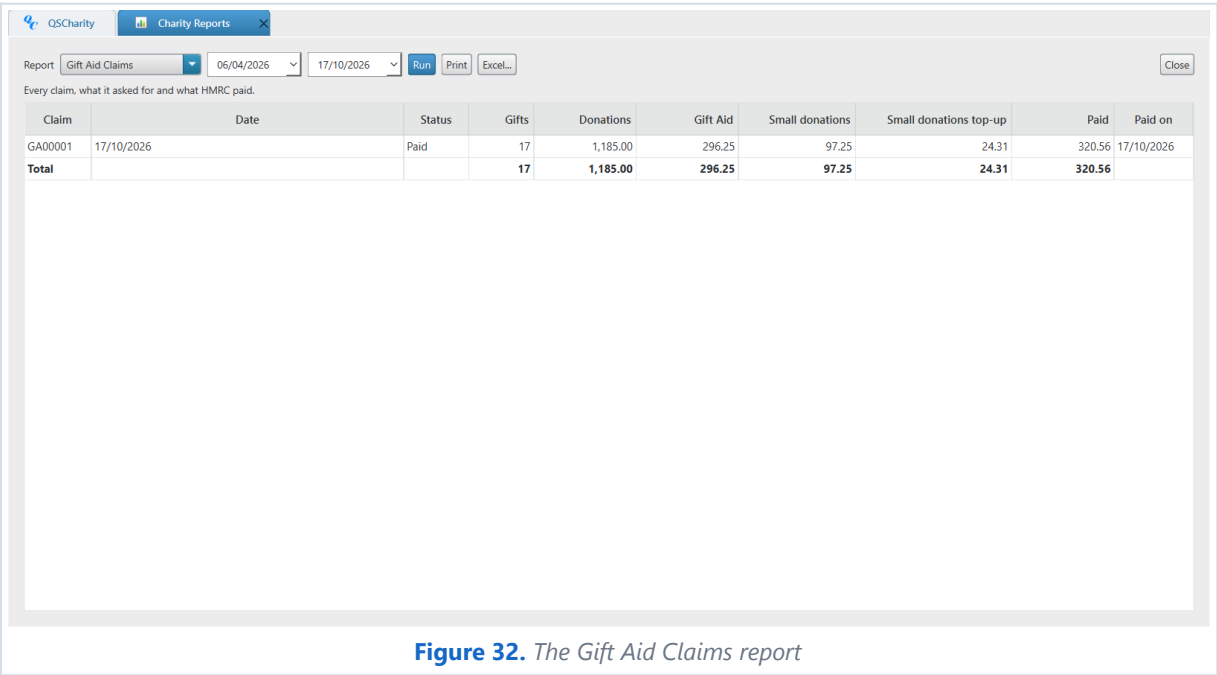
Bank

Figure 30. HMRC's payment

A few weeks later HMRC pays. Press **Paid...**: the amount is filled in for you, so check the date and the bank account and press **OK**. QuiSuite banks it, and HMRC owes nothing any more.



The claim now shows **Paid**, with the date it was sent, HMRC's reference and the £320.56 HMRC paid.



The **Gift Aid Claims** report lists every claim: what it asked for, what HMRC paid and when. It is your record of every claim the charity has made.

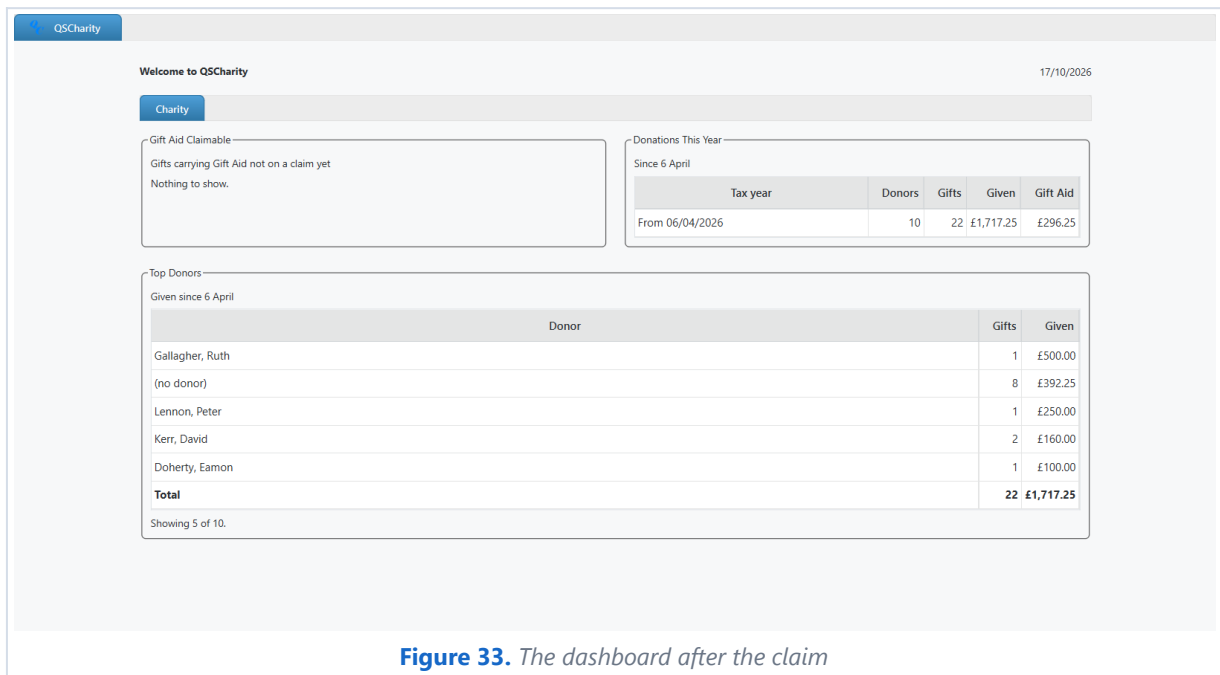


Figure 33. The dashboard after the claim

Back on the dashboard, **Gift Aid Claimable** now says "Nothing to show": everything has been claimed. **Donations This Year** shows the Gift Aid on the year's gifts, £296.25, now that Eamon Doherty's gift counts too.

Quick reference

A claim, step by step

1. Record each gift in **Charity > Gifts** (or from a donor's record) as it comes in, and press **Bank** when it is banked.
2. Run **Gifts Without Gift Aid** and chase any missing declarations.
3. Open **Charity > Gift Aid Claims**, check the preview, and press **Make Claim**.
4. Press **Save Schedule...**, and send the claim with the schedule through Charities Online.
5. Press **Sent to HMRC...** with HMRC's reference.
6. When HMRC pays, press **Paid...**

Try it yourself on the test drive

1. In **Charity > Gift Aid Declarations**, open Sean O'Neill's declaration, put today's date in **Written record sent** and save. Then look at his gift in **Charity > Gifts**.
2. Add yourself as a donor with a written declaration, and give £20. How much Gift Aid does it carry?
3. Record a collection tin of £15.50 as **Small cash** with no donor, then preview a claim. Watch the Small Donations top-up grow.
4. Change David Kerr's gala ticket so the **Benefit to donor** is £10. Does it carry Gift Aid now?