Using the new CASHflow website

A guide for creditors

How CASHflow can help you

CASHflow is free online tool that can help people deal with their debts themselves with the support of a trained debt adviser.

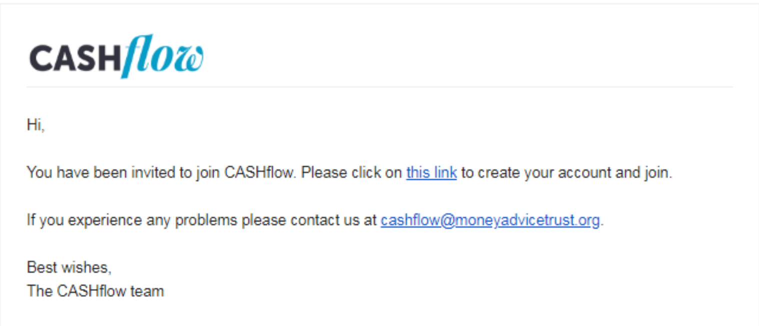
CASHflow gives advisers and their clients access to a secure portal with a CASHflow Standard Financial Statement (SFS). Each CASHflow SFS has a unique code, and once it has been signed-off by a trained adviser, it will appear with the CASHflow SFS logo so that you know your customer has had advice about their debts and their income and expenditure has been checked.

If you have a CASHflow account your customer can give you permission to view their CASHflow SFS online, streamlining the process for you and your customer.

If the budget has been CASHflowed this means that it has been signed-off by a trained adviser. It will appear with the CASHflow SFS logo so that you know your customer has had advice about their debts and their income and expenditure has been checked.

Accessing the site

- Requests from creditors to use CASHflow are made via email to the Trust via: cashflow@moneyadvicetrust.org
- To be eligible to use CASHflow, creditors must have a Standard Financial Statement licence
    - If you do not have a SFS licence please request one here: https://sfs.moneyadviceservice.org.uk/en/apply-to-use-the-sfs
- The CASHflow invitation (below) to set up a credit account is sent to the inbox of the person making the request.
    - Please check your spam folder in case the invitation goes in there.



CASHflow

Hi,

You have been invited to join CASHflow. Please click on this link to create your account and join.

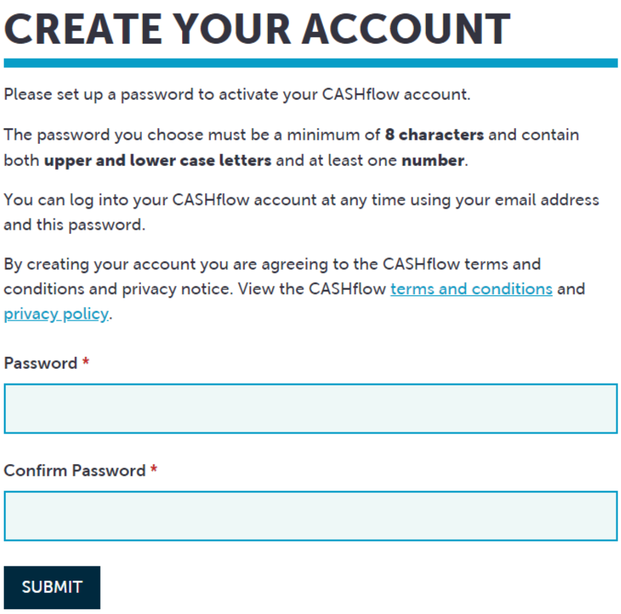
If you experience any problems please contact us at cashflow@moneyadvicetrust.org.

Best wishes,
The CASHflow team

- Click on the link in the email.

Setup your secure account

- Create your account by setting up a password:



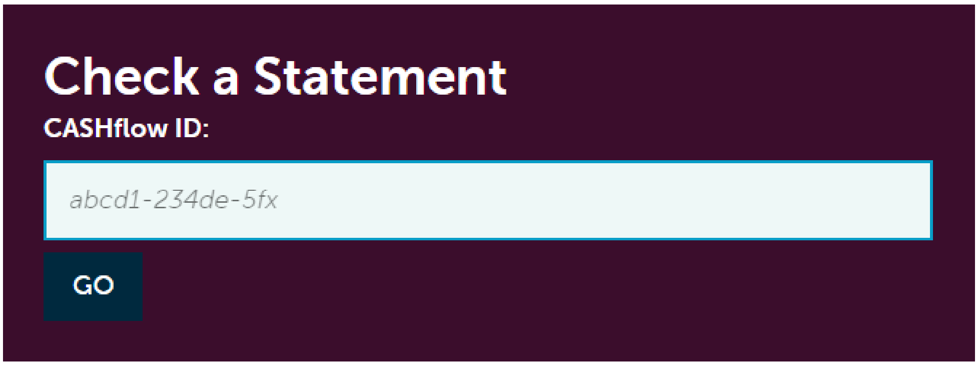
- By creating an account you are agreeing to us storing your personal details. The Money Advice Trust, who operates the CASHflow website, is committed to ensuring that you have control over the data we hold on about you. You can access our privacy policy prior to creating an account on the CASHflow website.
- You can delete your account at any time by contacting the Trust.

Website navigation

- There are 2 main pages that can be accessed via the menu bar at the top of the screen:

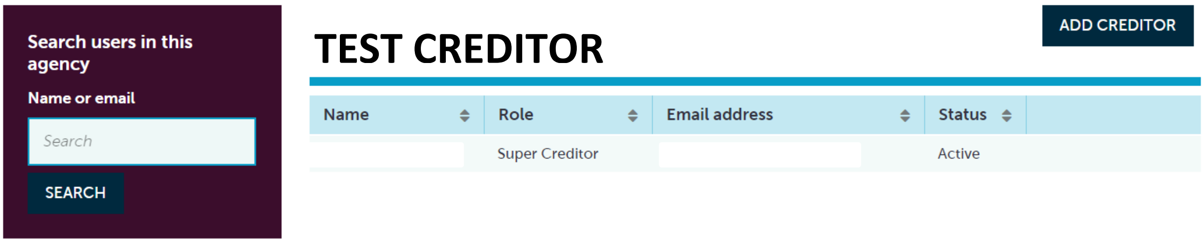
Check a statement

- You can check a customer's CASHflowed statement in this section if they have given you permission to view it and provided you with their unique CASHflow ID.



Creditor Management

- This page lists the people who are part of your organisation with access to CASHflow.
- Click to add additional colleagues within your organisation.
- Use the search function to search for colleagues.



Question / Help

- If you have any questions about CASHflow, please contact: cashflow@moneyadvicetrust.org