

Troubleshooting guide, April 2014

We receive a large number of queries following the publication of new CFS trigger figures. This guide covers the most common questions and issues we are asked by licence-holders and applicants. We hope it will help you log in to the CFS website and access the updated trigger figures quickly and without difficulty.

If your question is not answered here or you need further assistance, please email cfs@moneydvicetrust.org with details of your query. We will reply as soon as we can.

Questions and issues

Logging in

- My log-in details are not working
- I have lost my log-in details or don't have any details

Using the CFS budget form (Excel spreadsheet)

- I cannot edit the CFS budget form because it is 'read-only'
- I cannot edit the CFS budget form because some cells are 'protected'
- The budget form is too small
- I am having problems with another software package

Trigger figures

- I would like a further breakdown of the trigger figures

Applying for a licence

- I applied for a licence but I haven't received a response
- I can't register because my organisation already has a licence
- I work for a CAB – do I need to register?

Logging in

My log-in details are not working

To log into CFS you need a licence key and a licence number. The key contains a mixture of numbers and upper and lower-case letters. The system will not recognise it unless it is entered in the exact format shown in your licence confirmation email. We recommend using cut-and-paste to enter the details. Please also note that the licence *key* needs to be entered first, followed by the licence *number*.

I have lost my log-in details or don't have any details

If you registered the licence yourself, you can request a [reminder](#) through the website. If this does not apply, please ask colleagues and check your internal systems for details. If you are unable to locate your details, please email us and we will confirm them as soon as possible.

Using the CFS budget form (Excel spreadsheet)

I cannot edit the CFS budget form because it is 'read-only'

This is caused by your computer's download settings. Change the name of the file and save a copy to your computer in order to edit the file.

I cannot edit the CFS budget form because some cells are 'protected'

Some parts of the CFS budget form are deliberately protected from editing to preserve the formatting and functionality of the spreadsheet. This includes the 'financial statement' worksheet, which is filled in automatically as you complete the rest of the spreadsheet. Trigger figures and totals boxes are also protected. Any fields involving client details, income and spending figures and notes boxes are unprotected and can be freely edited.

The CFS budget form is too small

On some operating systems, the CFS budget form spreadsheet is set to a small zoom setting by default. You can adjust this using the 'View' settings on Excel or by pressing the 'Ctrl' and '+' keys on your keyboard.

I am having problems with another software package

The Money Advice Trust is only able to provide support for the CFS budget form in Excel, which we provide via www.cfs.moneyadvicetrust.org. If you are using third party software to access CFS, please contact the developer directly.

Trigger figures

I would like a further breakdown of the trigger figures

This [overview of categories](#) explains what is covered in each of the four trigger figure areas. Please note that trigger figures only apply to categories. There are no trigger figures for individual budget items within each category.

Applying for a licence

I applied for a licence but I haven't received a response

We aim to process licence applications within two working days. Please check your 'spam' or 'junk' folder if you have not received a reply from us after this time, as our confirmation emails sometimes wrongly detected as spam. If you have tried this and have still not there, please email us and we will investigate.

I can't register because my organisation already has a licence

CFS licences cover organisations rather than individuals, so we will only register each organisation once. Please ask colleagues or check your internal systems for licence details, if possible. If you are not able to find details through colleagues, please send us an email and we will forward your licence details to you as soon as possible.

I work for a CAB – do I need to register?

All CABs in England and Wales are covered under a single licence. You do not need to register separately. Please ask colleagues or check your internal systems for details.

