

USER GUIDE

for online access to a CAF Company Account



www.cafonline.org/companyaccount

CAF Charities Aid
Foundation

To register

- Go to www.cafonline.org/register
- Select CAF Company Account
- Click **Continue**
- Complete your contact details and click **Next**
- Enter your company name and account number and click **Finish**
- You will receive an email to activate your login

To login

- Once you have activated your account go to www.cafonline.org
- Click **Login** in the top right hand corner
- Enter your username and password and click **Submit**
- You will be provided with a list of the accounts to which you have access.
Please note you must complete the registration process above for each account for which you would like access
- Select the account you would like to review/make a payment from and click the **Select account** button at the bottom of the screen
- You will be directed to the account summary including your balance and the most recent transactions made

View account summary

- To view your account summary at any other time go to the main menu at the top of the page, hover over the My account tab and select Account summary from the drop down menu
- You will see a summary of your account including the balance and the most recent transactions

View transactions

- Go to the main menu at the top of the page, hover over **My account** and select **View transactions** on the drop down menu *or*
- On the account summary page click the **View more transactions** button at the bottom of the page
- On the view transactions page you can view transactions in date or type order by entering the details and clicking the **Apply filter** button

To download statements

- Go to the main menu at the top of the page, hover over **My account** and select **Download statements** *or*
- On the account summary page click the **View statements** button at the bottom of the page
- Select the statement you wish to view and click the **View statement** button – your statement will be downloaded as a PDF and you can save it if required

To make a donation to a UK charity

- Go to the main menu at the top of the page, hover over **Manage donations** and click **Make donation** on the drop down menu
- Enter a charity name, charity number or other keyword(s) and click the **search** button
- The system will display a list of all UK charities that match your search criteria, enabling you to donate to the charity of your choice
- To extend your search criteria click the **More search options** button, this will allow you to search within a radius of your location, by charitable activity and by income range
- For more information on any of the charities listed click on the charity's name
- To make a donation click on the **Donate** button next to the charity to which you would like to donate to
- Select the payment method you would like to use; to make a payment from your CAF Company Account please select the third option (CAF Charity Account, CAF Charitable Trust), click **Next**
- Enter the amount you would like to donate, or CAF Company Account, you can also include any special instructions for the charity or you can opt to donate anonymously
- To complete the donation click the **Donate now** button at the bottom of the screen
- To donate to another charity click the **Add another charity** button at the bottom of the page, when you have added all the charities to which you would like to donate to at this time please click the **Donate now** button
- Review the details of your donation and click **Confirm donation**
- You will receive an email to confirm your donation(s) and they will appear as a transaction on your account

Can't find your charity?

If the charity to which you want to donate to is not listed click the **Can't find your charity** button at the bottom of the search page for tips on how to use the search function. If you would like to nominate a new charity click on **Would you like to nominate a new charity?** at the bottom of the tips page.

To make an overseas donation

- Go to the main menu at the top of the page, hover over **Manage donations** and click **Donate overseas** on the drop down menu
- All overseas payments must be validated offline by our charity validation team but submitting a request online will start this process
- Complete the form and click **Submit**
- Our team will contact you for further information

To maintain your standing orders

- Hover over **Manage donations** on the main menu and click **Maintain standing orders** on the drop down menu
- The list will display your current and expired standing orders
- You can sort these by status, charity name, donation amount, start date, end date or frequency by clicking on the arrows at the top of the column you would like to sort by
- To view or edit a standing order click on the **View/edit** button on the right hand side of the page
- Make your amends and click **Update**

To add a new standing order

- Click the **Add a new standing order** button on the Main standing orders page
- Enter a charity name, charity number or other keyword(s) and click the **Search** button
- To extend your search criteria click the **More search options** button, this will allow you to search within a radius of your location, by charitable activity and by income range
- The system will display a list of all UK charities that match your search criteria, enabling you to set up a standing order to the charity of your choice
- For more information on any of the charities listed click on the charity's name
- Click on the **Add a new standing order** button on the right
- Enter the amount you would like to donate, select how regularly, put in the start and any optional details (eg end date or special instruction) for the standing order and click **Submit**
- Please note it can take up to 24 hours for a standing order to appear on your account
- You will receive an email to confirm your standing order has been set up

If you have any questions when using our online system, please contact a member of our Customer Service team on **03000 123 222** or email **companyaccounts@cafonline.org**