

Set-up Guide for CashCalc Transact Integration

After logging in, click on “My Account” at the top of the screen.

The screenshot shows the CashCalc Transact user interface. At the top, there is a navigation bar with a logo on the left and menu items: Home, My Clients, Add Client, and My Account. The 'My Account' item is highlighted with a green oval. To the right of the menu is a 'Logout' button. Below the navigation bar is a secondary bar with icons for Messages, Notifications, and Add a login. The main content area is titled 'Dashboard - Tom Newton' and features two large red action cards: 'Add a new client' and 'View your existing clients (9 total)'. To the right of these cards are icons for email, phone, information, and a document. Below the cards is a 'Continue working on...' section with an example entry 'Example Dastardly (updated 1 day ago)'. The dashboard is divided into three columns. The left column contains a 'Blog' section with filters for 'New', 'Popular', and 'Case Studies', and three article previews. The middle column contains a 'Forecasts created' section with a list of forecast types and their percentages. The right column contains a 'Recent forecasts' section with two forecast entries. At the bottom, there is a 'CashCalc TV' section with a 'View All' button. The URL 'https://cashcalc.co.uk/myaccount' is visible in the bottom left corner.

Dashboard - Tom Newton

Navigation: Home | My Clients | Add Client | **My Account** | Logout

Dashboard Actions: Messages | Notifications | Add a login

Dashboard - Tom Newton

Actions: Add a new client | View your existing clients (9 total)

Blog: New | Popular | Case Studies

Forecasts created:

Cash flow modelling	(43%)
Pension forecasts	(34.6%)
Investment forecasts	(7.5%)
Tax forecasts	(9.3%)
Mortgage forecasts	(3.7%)
Protection forecasts	(1.9%)

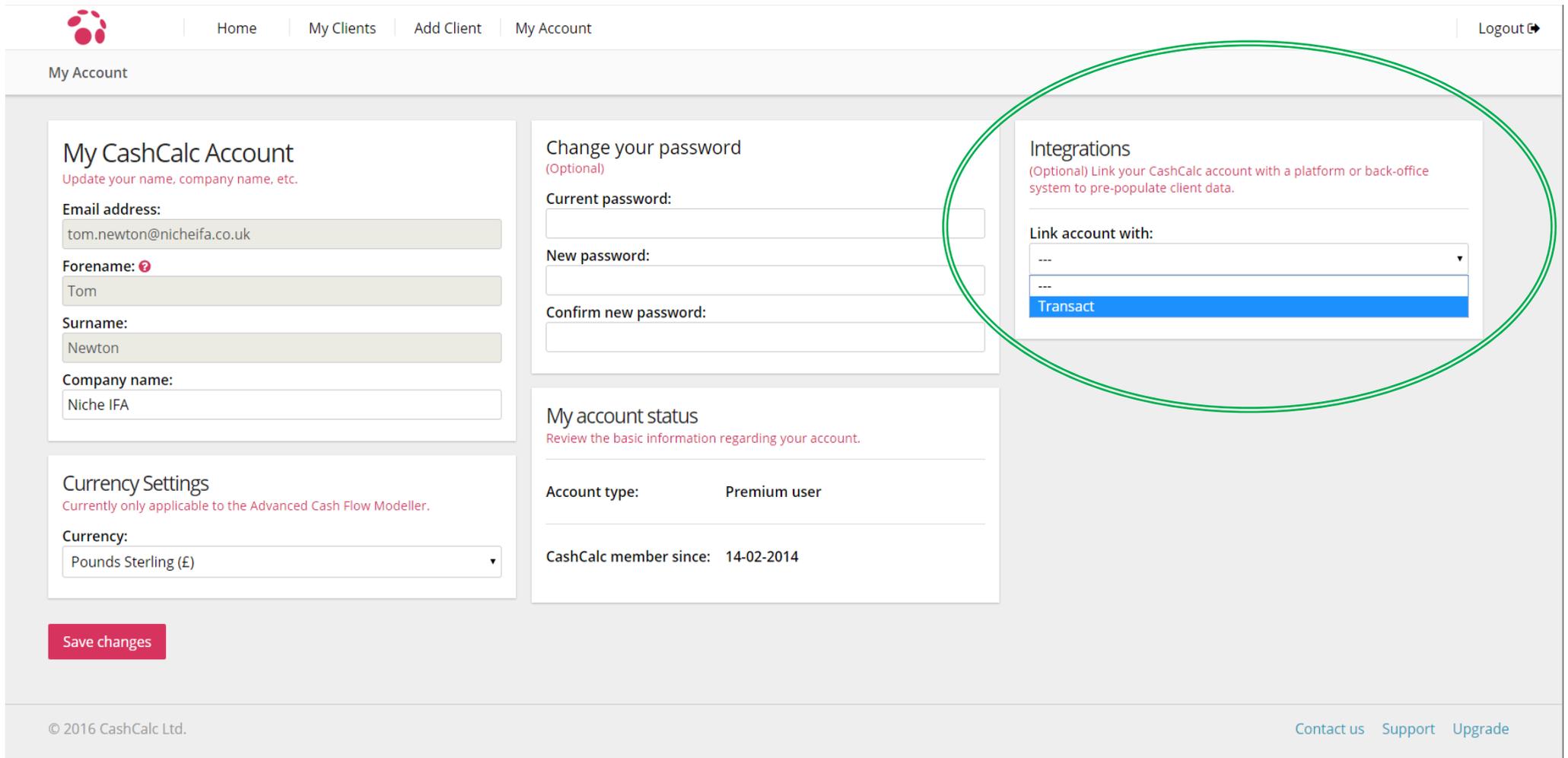
Recent forecasts:

- Mortgage Forecast - 13:47:43 - 09-06-2016 (Example Dastardly)
- Testing (Muttley the Dog)
- Early Retirement Forecast - 15:52:31 - 13-01-2016 (Elmer Fudd)

CashCalc TV | View All

URL: https://cashcalc.co.uk/myaccount

There will be a section entitled "Integrations" – select the item labelled Transact from the dropdown menu here.

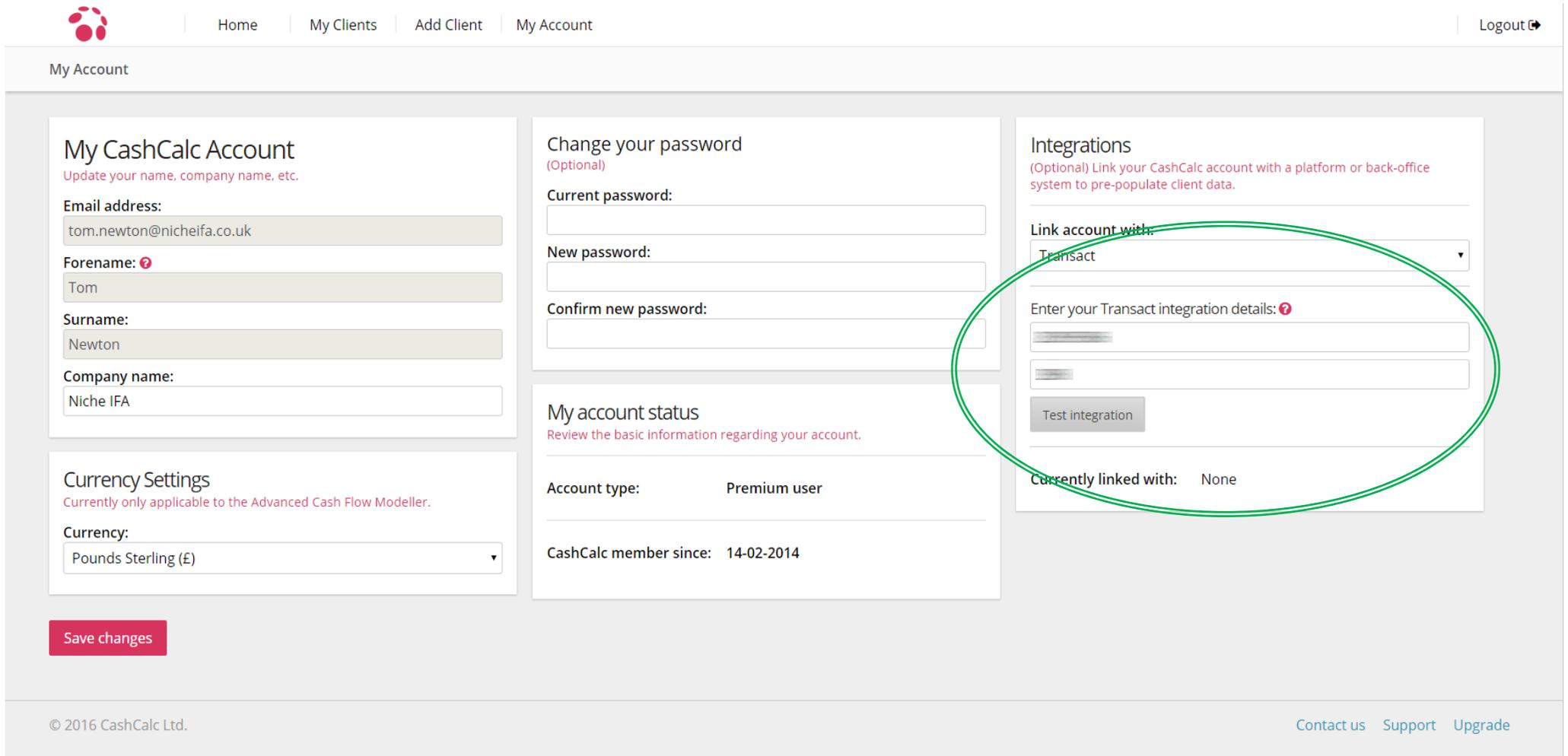


The screenshot shows the 'My Account' page of the CashCalc system. The navigation bar at the top includes 'Home', 'My Clients', 'Add Client', 'My Account', and 'Logout'. The main content area is divided into several sections:

- My CashCalc Account:** A form for updating account details. Fields include 'Email address' (tom.newton@nicheifa.co.uk), 'Forename' (Tom), 'Surname' (Newton), and 'Company name' (Niche IFA).
- Change your password (Optional):** A form with three password input fields: 'Current password', 'New password', and 'Confirm new password'.
- Integrations:** A section titled 'Integrations' with the subtitle '(Optional) Link your CashCalc account with a platform or back-office system to pre-populate client data.' It features a dropdown menu labeled 'Link account with:' with 'Transact' selected and highlighted in blue.
- My account status:** A section showing 'Account type: Premium user' and 'CashCalc member since: 14-02-2014'.
- Currency Settings:** A section with the subtitle 'Currently only applicable to the Advanced Cash Flow Modeller.' It has a 'Currency:' dropdown menu set to 'Pounds Sterling (£)'.

A red 'Save changes' button is located at the bottom left of the account settings area. The footer contains the copyright notice '© 2016 CashCalc Ltd.' and links for 'Contact us', 'Support', and 'Upgrade'.

Enter your Transact ID and PIN and then hit "Test Integration" to connect to the Transact service and see if the details are valid.



 Home | My Clients | Add Client | My Account Logout 

My Account

My CashCalc Account

Update your name, company name, etc.

Email address:
tom.newton@nicheifa.co.uk

Forename: 
Tom

Surname:
Newton

Company name:
Niche IFA

Change your password

(Optional)

Current password:

New password:

Confirm new password:

Integrations

(Optional) Link your CashCalc account with a platform or back-office system to pre-populate client data.

Link account with:
Transact 

Enter your Transact integration details: 

Currently linked with: None

My account status

Review the basic information regarding your account.

Account type: Premium user

CashCalc member since: 14-02-2014

Currency Settings

Currently only applicable to the Advanced Cash Flow Modeller.

Currency:
Pounds Sterling (£) 

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If you get a success message, hit “Save Changes” at the bottom of the screen for this to take effect.

The screenshot displays the 'My Account' page with the following sections:

- My CashCalc Account:** Fields for Email address (tom.newton@nicheifa.co.uk), Forename (Tom), Surname (Newton), and Company name (Niche IFA).
- Currency Settings:** A dropdown menu for Currency set to 'Pounds Sterling (£)'.
- Change your password (Optional):** Fields for Current password, New password, and Confirm new password.
- My account status:** Shows Account type as 'Premium user' and CashCalc member since '14-02-2014'.
- Integrations:** A dropdown for 'Link account with:' set to 'Transact'. Below it, a 'Test integration' button is visible, and a blue success message reads 'Success: Account details are valid.'.

At the bottom left, a red 'Save changes' button is circled in green. At the bottom right of the integrations section, the success message is also circled in green.

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From this point on, when adding or editing a client you will have the option to quick-add or link a CashCalc client to an existing Transact client.

For all linked clients, once you then go into the Advanced Cash Flow Modeller you will be able to quick-add or link Savings Pots & Pensions for that client into a forecast. You will also be able to click “update to current value” to pull through live pot values from Transact.