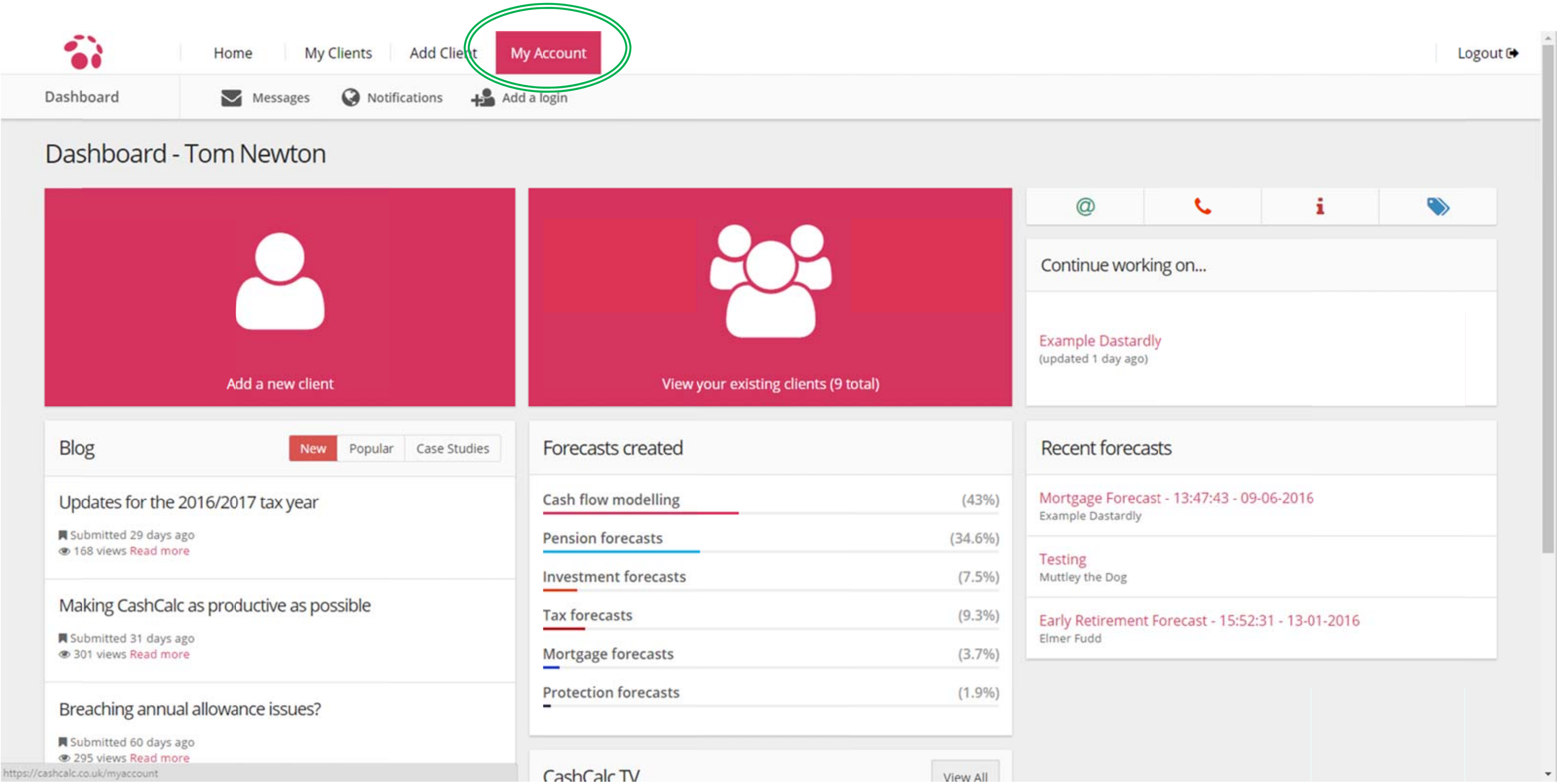
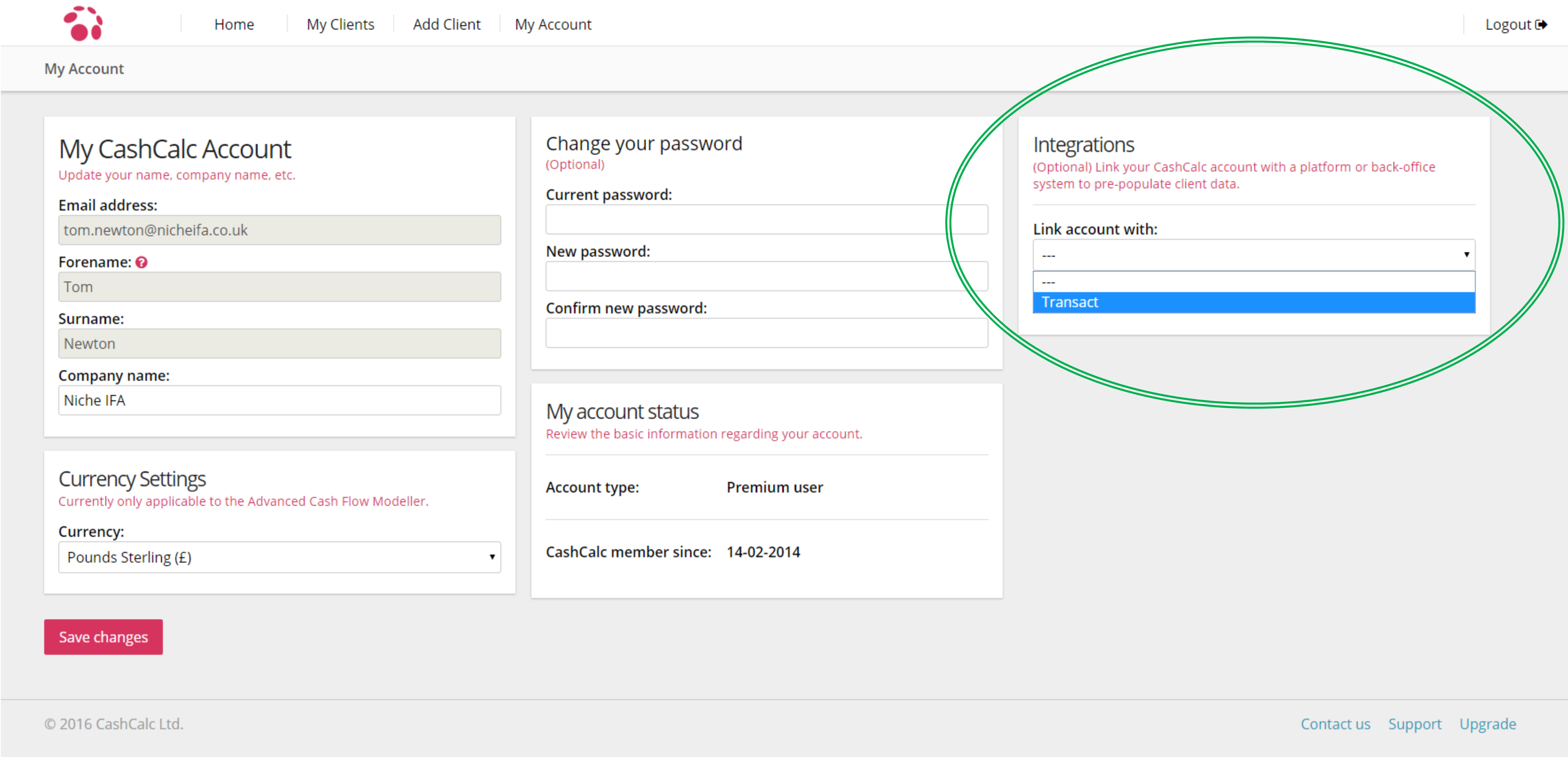
Set-up Guide for CashCalc Transact Integration

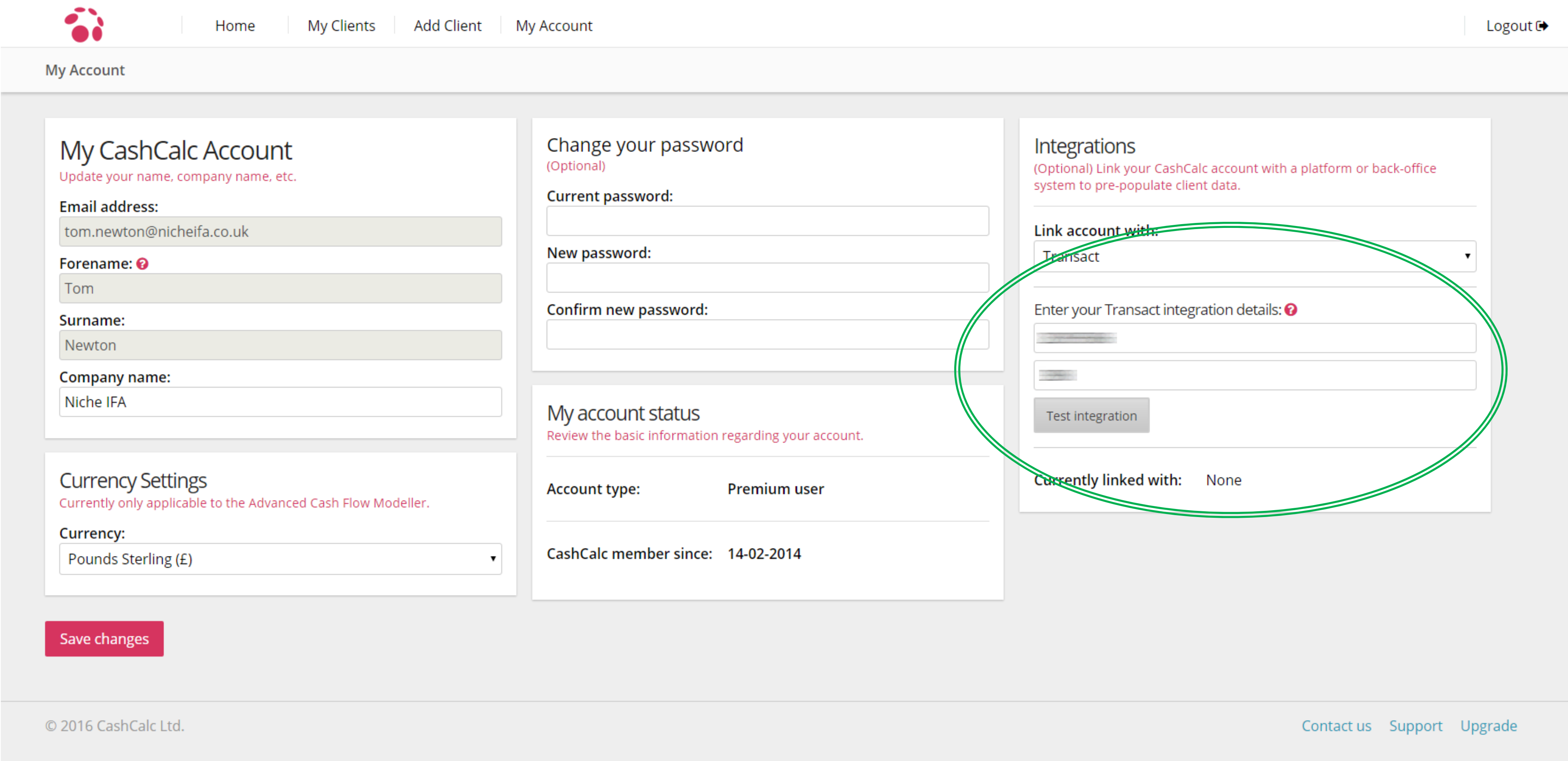
After logging in, click on "My Account" at the top of the screen.



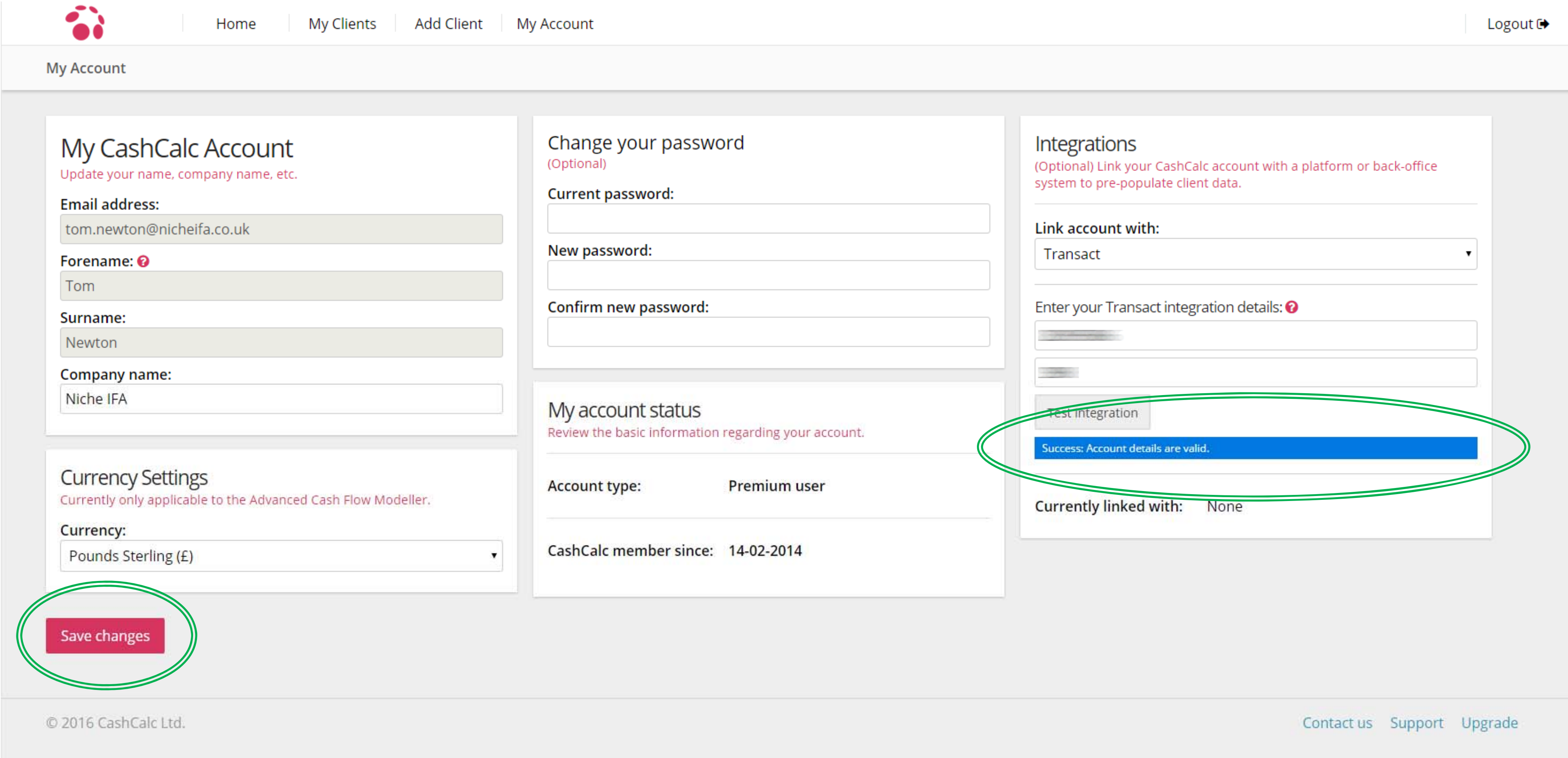
There will be a section entitled “Integrations” – select the item labelled Transact from the dropdown menu here.



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



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



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.