

FE CashCalc

FOR ADVISER USE ONLY

Usage MI for group admins

Release Notes
October 2026

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Release summary

Release	Applies To	Effective Date	Status
Q4 2026	Group admins in CashCalc groups	16 October 2026	Live

Usage MI reports

What's New

Group admins can now generate usage management information (MI) reports directly from the My Group area of CashCalc. Choose a reporting period, download the report, and see how engagement and activity look across your group.

Key Features

Report generation

- Select a From date and a To date, then download an MI metrics report as a CSV file.
- Every report covers all members of your group.
- CashCalc prepares the report in the background, so you can carry on working while it processes.
- A notification in the CashCalc bell tells you when the report is ready.

Report management

- The MI report list shows each report with its name, status and date generated.
- Download a report once its status changes to Ready.
- Delete reports you no longer need.

Access and limits

- Usage MI is available to group admins only.
- Each report can cover up to three months, but the historical usage data goes back up to one calendar year.
- Usage MI is available for groups in FE CashCalc.

Why It Matters

Group admins need to see how advisers and clients use CashCalc. That includes logins, cashflows created, documents sent, FactFinds and ATRQs completed, and client portal activity. The usage MI report now makes this data available to your group, so you can review engagement across your group whenever you need to, without waiting for someone else to produce it.

Use Case

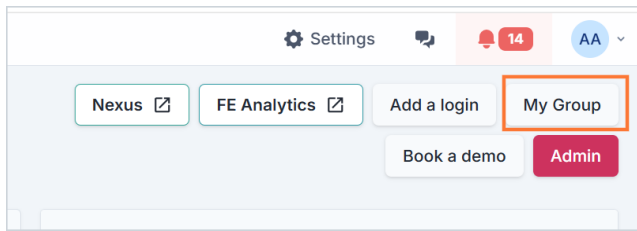
A group admin at Wealth firm ABC is preparing for a quarterly review and wants to see adviser and client portal activity since the middle of July. They open Usage MI from My Group, enter 16 July 2026 as the From date and 16 October 2026 as the To date, and select Download MI metrics report. Once the bell notification arrives, they download the CSV file and open it in a spreadsheet to compare logins, cashflows created and documents sent across their advisers.

Implementation Detail

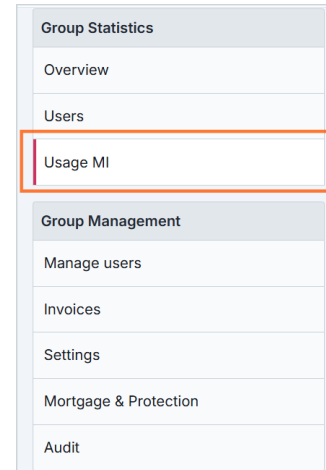
Finding Usage MI

Usage MI sits in the My Group area, under Group Statistics.

1. On the CashCalc Home page, select My Group.
2. In the menu on the left, under Group Statistics, select Usage MI.



The My Group button on the Home page



Usage MI in the Group Statistics menu

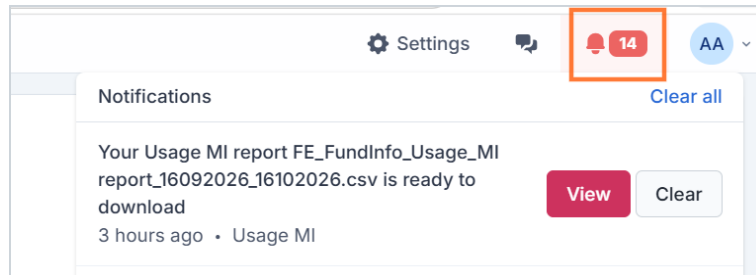
Generating a report

Use the From and To fields to set your reporting period. Enter each date as day, month and year.

1. Enter the first day of your reporting period in the From field.
2. Enter the last day of your reporting period in the To field.
3. Select Download MI metrics report.
4. CashCalc adds the report to the MI report list with the status In progress and today as the date generated.
5. When processing finishes, CashCalc posts a notification to the bell and changes the status to Ready.
6. Select Download on the report row to save the CSV file.

A screenshot of the 'Usage MI' report generation form. It has a title 'Usage MI' and a subtitle 'Select a reporting period and download the MI metrics report.' Below this are two date pickers labeled 'From' and 'To'. The 'From' date is 16/09/2026 and the 'To' date is 16/10/2026. To the right of the date pickers is a red button labeled 'Download MI metrics report'. Below the date pickers, there are two lines of text: 'Historical usage data is available for up to one calendar year.' and 'A single report can cover a period of up to three months.'

Choosing the reporting period on the Usage MI page



The bell notification that appears when a report is ready

Edge case: invalid date ranges

- If the From date is after the To date, an inline message tells you the date range is invalid and CashCalc does not create a report.
- If the date range is longer than three months, an inline message tells you the maximum range is three months and CashCalc does not create a report.
- You can report on historical usage data going back up to one calendar year.

The MI report list

The MI report list shows every report generated for your group. Report extraction can take a few minutes, so the list tells you where each report stands.

Column	What it shows
Name	The report file name, built from your group name, the report type and the dates you chose.
Status	In progress while CashCalc prepares the report, and Ready once it is available.
Date generated	The date you requested the report.
Actions	Download and Delete buttons. Download is available only when the status is Ready.

MI report list Report extraction may take a few minutes. You will be notified via the CashCalc notification bell when the report is ready.			
Name	Status	Date generated	Actions
FE_FundInfo_Usage_MI report_16072026_16102026.csv	Ready	16 Oct 2026	Download Delete
FE_FundInfo_Usage_MI report_16092026_16102026.csv	Ready	16 Oct 2026	Download Delete

The MI report list with two reports ready to download

Report names. Each file follows the pattern Group name_Usage_MI report_From date_To date.csv, with dates written as day, month and year. For example, Wealth_firm_ABC_Usage_MI report_30112025_30122025.csv covers 30 November 2025 to 30 December 2025.

Deleting a report

Select Delete on any report row, whether its status is In progress or Ready. CashCalc removes the row from the MI report list and deletes the report file.

Edge case: deleting a report

- Download the report first if you need to keep a copy, because CashCalc removes the file when you delete the row.

Who the report covers

Every report covers all members of your group. Metrics that end in "in period" use the From and To dates you choose. Metrics marked "all time" ignore the reporting period.

Metrics included in the report

The report includes the following metrics and columns.

Metric or column name	Definition
Name	Adviser name.
Integration Status	Whether the adviser has integrated their CashCalc account with an external provider (e.g. Xplan, Intelliflo, Curo, Transact, Wealthcraft, Adviser Cloud).
Total Clients	Number of clients assigned to the adviser.
Total Clients on Portal who have registered an account	Number of the adviser's clients that have a registered client portal account.
Clients onboarded in period	Number of the adviser's clients whose portal account was created within the reporting period.
Total Adviser Logins in period	Number of times the adviser logged into CashCalc within the reporting period.
Total Client Portal logins in period	Number of times the adviser's clients logged into the client portal within the reporting period.
Net Cashflows created in period	Number of Net Cashflow scenarios created by the adviser within the reporting period.
Gross Cashflows created in period	Number of Gross Cashflow scenarios created by the adviser within the reporting period.
Documents sent in period (By adviser)	Number of documents sent by the adviser to their clients within the reporting period.
Documents sent in period (By client)	Number of documents sent by the adviser's clients within the reporting period.
FactFinds completed in period (By adviser)	Number of fact finds completed by the adviser within the reporting period.
FactFinds completed in period (By client)	Number of fact finds completed by the adviser's clients within the reporting period.
ATRQs completed in period (By adviser)	Number of attitude to risk questionnaires completed by the adviser within the reporting period.

Metric or column name	Definition
ATRQs completed in period (By client)	Number of attitude to risk questionnaires completed by the adviser's clients within the reporting period.
License type	The adviser's licence type: Adviser or Paraplanner.
Portal version	The portal version or brand name of the adviser's group.
Email address	The adviser's email address.
Last Login Date	Date and time the adviser last logged into CashCalc (all time).
Clients who logged into the portal in period	Number of the adviser's clients who logged into the client portal at least once in the period.
Portal invitations claimed in period	Number of the adviser's clients who accepted a portal invitation in the period.
Last activity date (by adviser)	Date and time of the most recent entry in the adviser's activity log (all time).
Total Activity (by adviser)	Total number of activities performed by the user (count of all actions and events performed by the user in CashCalc) during the period.

Restrictions

Who can use Usage MI

- Usage MI is available to group admins only.
- Each report covers a maximum of three months

Frequently asked questions

Q: Who can see the Usage MI page in CashCalc?

A: Only group admins can use Usage MI. If a standard user opens the page, CashCalc denies access with a clear message or redirects them to the group home page.

Q: How far back can I run a usage MI report?

A: You can report on historical usage data going back up to one calendar year. A single report covers a maximum of three months, so run more than one report to cover a longer period.

Q: How do I know when my usage MI report is ready?

A: Report extraction can take a few minutes. When the report is ready, CashCalc posts a notification to the bell and the status in the MI report list changes from In progress to Ready.

Q: What happens when I delete a report?

A: CashCalc removes the row from the MI report list and deletes the report file. Download the report first if you need to keep a copy.

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