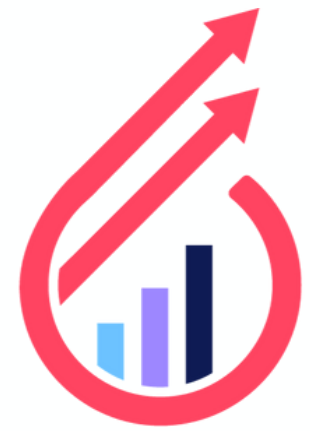


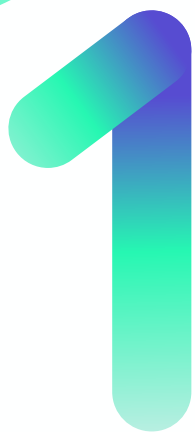
***CFO Techstack***



# ***How I Stacked It***

**Kat Wellum-Kent  
Fractional CFO at  
Fractional Finance**





# Processing Supplier Invoices

With Hubdoc, you can import all your financial documents and export them into data you can use.

*"Hubdoc isn't as fancy as Dext but it does what we need to automate the processing of supplier invoices into Xero."*

[hubdoc.com](https://hubdoc.com)



# 2

## Cash Flow Forecasting

Float tracks cash across your project pipeline, spots dangers in advance and offers a visual forecast of the future – so you can make sustainable decisions.

*“This allows us to manage cash flow forecasting on a much more detailed basis than a monthly forecast. Float has a strong integration with Xero. This allows for automatic updates of actual financial data and visibility of upcoming invoices and bills. Additionally, Float provides an easy-to-use scenario feature for financial planning. You can also update expected payment dates within Float.”*

# 3

## Management Reporting

Fathom combines insightful reporting, fast cash flow forecasting and actionable financial insights into one refreshingly easy business management solution.

*"This is our main tool for management reporting packs, as well as producing simple 3-way integrated financial forecasts. Fathom has a great mix of tables and charts and it's really easy to tailor."*

[fathomhq.com](https://fathomhq.com)

# 4

## Approval Workflows

ApprovalMax fully replaces paper- or email-based manual approvals of bills and supplier invoices with automated approval workflows that establish granular financial controls for all spending.

*“This isn’t something we use internally at the moment but it’s a tool which we often implement for our clients. ApprovalMax’s bespoke workflows allow us to create approval processes to meet each client’s individual requirements.”*

[approvalmax.com](https://approvalmax.com)

# Telleroo.

# 5

## Payments

Quickly and easily make bulk supplier and payroll payments.

*“A payment processing tool with great links to Xero, Telleroo works both for supplier payments and payroll. They’ve just launched multi-currency payments as well as having security checks to flag when bank details are new or updated and payee names don’t match the bank account you’re paying to.”*

[telleroo.com](https://telleroo.com)

# GoCardless



## Direct Debit

Collect instant, one-off payments. Or automated recurring payments. Without the chasing, stress or expensive fees.

*“Once our clients accept our proposal, they automatically get a link to sign up to a direct debit through GoCardless. This means all our invoices are paid within 14 days of invoice, so no time is spent on credit control.”*

[gocardless.com](https://gocardless.com)

# 7

## HR and Payroll

Automate recruitment, HR, payroll and benefits with Employment Hero.

*“An end-to-end HR and payroll tool, Employment Hero can help manage recruitment, onboarding, appraisals, recognition and employee benefits, as well as payroll. We’ve just implemented it internally and ran our first recruitment process through it. I think it saved us around 10 hours whilst also presenting a slick process to potential candidates.”*

[employmenthero.com](https://employmenthero.com)





**ScaleXP**



# Subscription Models

Automate SaaS metrics, plus revenue recognition, deferred income and prepayments.

*“This isn’t a tool that we use internally, but it’s one that we recommend to our clients when they are operating a subscription model with a mix of billing profiles. ScaleXP automates the deferred income journals each month, as well as having great reporting functionality.”*

[scalexp.com](https://scalexp.com)