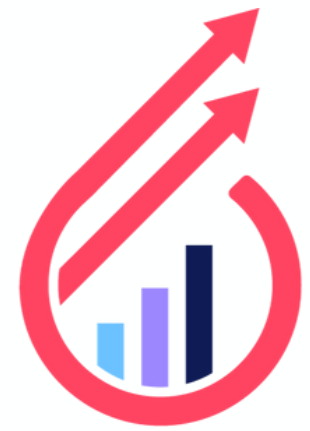


***CFO Techstack***



# ***How I Stacked It***

**Sara Monteiro**  
**Group Reporting Manager**  
**at ComplyAdvantage**





# Revenue Recognition

*“Maxio integrates with our CRM tool, to automate our subscription management, billing and revenue recognition. In addition, the metrics and reporting functionality have unlocked extremely insightful information to aid with performance analysis and management reporting.”*

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

A decorative graphic at the bottom of the page consisting of two overlapping, wavy shapes. The left shape is light blue and the right shape is a vibrant green, both with a soft gradient.



pento

2

## UK Payroll

*“The seamless real-time sync between our HRIS enables us to refresh payroll in minutes and ensure employee information is always up to date. Pento connects to HMRC, taking care of relevant payroll tax submissions, reporting, and funds remittance. With a little mapping, there is also the ability to automate payroll journal entries.”*

[pento.io](https://pento.io)

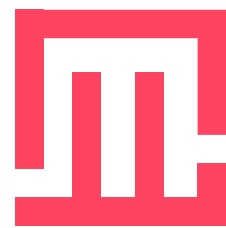
# 3

## **Consolidation and Management Reporting**

*“Fathom automatically syncs financial data from Xero and converts this information into consolidated financial statements. The helpful templates have enabled our team to automate management reporting since we can run the reports live and tailor reporting packs to different user needs.”*

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





**Mayday**

# 4

## **Intercompany and Bank Reconciliations**

*"Mayday's BRAG functionality has allowed us to seamlessly reconcile our banks without constantly switching between Xero entities. It's eliminated the risk of one-sided postings to our intercompany accounts and the risk of bills being paid twice. The Balancer function has a live dashboard presenting intercompany positions at any given time, identifying skews that unbalance these, and automating foreign exchange postings on Xero."*

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

# anrok

# 5

## US Sales Tax

*“As we scale in the US, reporting and compliance requirements have been highly important to our team. We recently decided to bring in Anrok, a tool that automates sales tax compliance across the region. It equips us with live monitoring and exposure tracking, as well as relevant state registrations and filings, allowing us to scale efficiently.”*

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



# Expense Management

*“Rydoo has revamped our expense process. Its integration with our HRIS and Xero takes care of the user maintenance and expense reporting aspects. The approvals workflow allows for accountability of budgetary control to be assigned to managers, with the finance team reviewing at high level before reporting on these. The system scans expenses to automatically populate form fields, reviews expenses based on our expense policy rules, and highlights duplicates for our team to prioritise. Finally, it’s extremely versatile and includes many other functionalities, such as per diem submissions, mileage reimbursement, and Rydoo cards.”*

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



Zahara

# 7

## PO and Invoice Automation

*“Zahara was implemented to help us with a few key areas, the first being the speed and accuracy of transaction processing as volumes grow. Their OCR scanning picks up on invoice information and completes these fields in the system. Another area we’ve improved with Zahara was the automation of approval workflows on purchase orders and invoices, which are automatically routed to the correct approval level, based on rules set per division. The system then automatically chases outstanding approvals and its reporting functionality has allowed us to more efficiently perform month-end accruals.”*

[zaharasoftware.com](http://zaharasoftware.com)



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# Climate Reporting

*“Greenly helps us measure, analyse and reduce our carbon footprint. It's able to draw and consolidate information from various systems used across the company. The platform keeps us informed of our progress and provides articles to deepen our company's understanding of the matter. Moreover, Greenly's team is always open to supporting with the interpretation of our yearly findings and brainstorming operational improvements to our carbon footprint.”*

[greenly.earth](https://greenly.earth)

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# CHASER

# 9

## Credit Control

*“Chaser is our accounts receivable automation tool that streamlines the process of sending invoice reminders. By automating follow-ups and reminders, Chaser ensures that outstanding invoices are promptly addressed, improving cash flow while maintaining positive customer relationships.”*

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