



# A Slick Guide to Float

THE BEGINNER'S HANDBOOK



# What is Float?

Float is an easy-to-use **budgeting** and **cash flow management platform** that helps users visualise day-to-day incomes and outgoings, detailed budget information, as well as providing options to import invoices, bills and spreadsheets.

Notably, Float provides **scenario planning** opportunities, with users able to plan for "what if" situations using their current finances.

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# Benefits

## INTEGRATION

Float allows for **seamless integration** with **Xero**, **QuickBooks** and **FreeAgent**, enabling you to plan your cash flow in **real-time**, vital for any business in these fast-moving times.

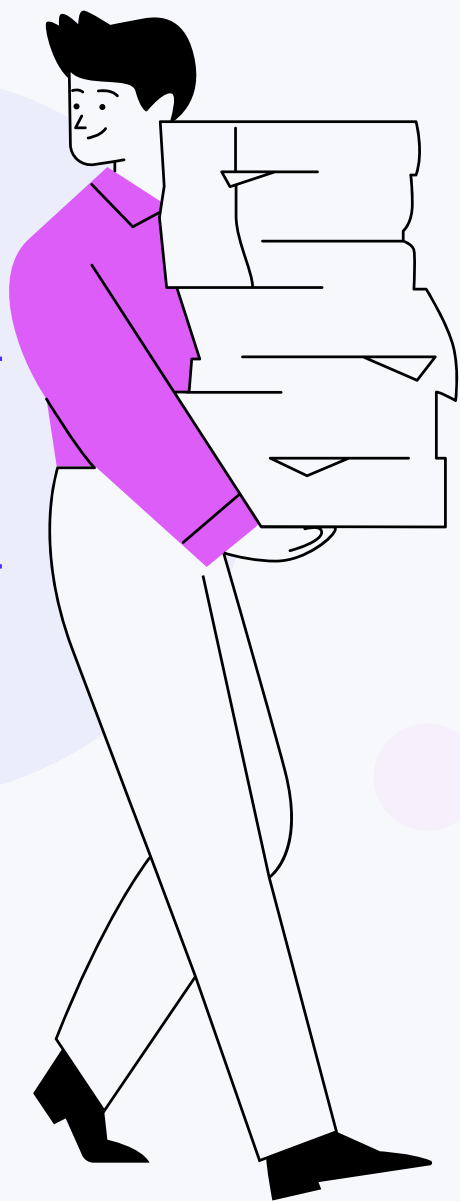
## SCOPE

You can **build** and **compare scenarios** for **any situation**, whether it be an employee leaving the company, losing a major client, or welcoming a new salesperson.

## AUTOMATIC SYNCING

With automatic synchronisation, Float will show you if you're **spending more** than planned or **receiving less** cash than you thought.





# How can cash flow forecasting help you?

- understand the impact of **future plans**
- keep track of **overdue payments**
- plan for **upcoming cash** gaps
- manage **surplus cash**
- track whether spending is on **target**
- **save time** over a spreadsheet



# Set-Up

## STEP 1

Register and login to your online Float account.

## STEP 2

Choose which software you wish to integrate with. Remember, **Float will never change the data** on your other platforms.

## STEP 3

Import any payrolls, invoices, bills or spreadsheets outwith Xero, QuickBooks or FreeAgent.

## STEP 4

Start exploring our forecasting and scenario planning options! Try adding future events to your cash budgets.

## STEP 5

You're ready to go! Time to think about what you can do with all this free time on your hands. Maybe try that hobby you've been putting off for a while?



# From floating to cruising

**SPEND LESS TIME ANALYSING THE PRESENT  
AND MORE TIME PLANNING FOR THE FUTURE**

**UNDERSTAND THE CASH IMPACT OF YOUR  
"WHAT IF" QUESTIONS**

**MAKE CONFIDENT DECISIONS FOR YOUR  
BUSINESS**



# Get in touch

For more information on Float, head to their website at [www.floatapp.com](http://www.floatapp.com)!

If you are interested in applying Float to your business, don't hesitate to send us an email at [hello@sllick.io](mailto:hello@sllick.io). We're always glad to help!

