



Welcome to Float!

Here's a checklist to help you get started with Float.

Welcome to Float, we're so happy you're here! We want to help you learn how to make the most of our software so you can help your clients understand the future of their cash. So we've put together a quick checklist to help you get to grips with Float!

1 Explore Float

- Check out our [how-to video](#) for a quick introduction to the software.
- Log into your Float account.
- Go into your client's company and take a look around!

2 Get Float set up

- Check the bank balance at the top right hand corner. If it looks off, [here's how to troubleshoot that](#).
- Set up your clients' bank accounts - [here's how!](#)
- Check the [expected payment dates](#) on open invoices and bills, as these will impact the cash flow forecast.
- [Set up your forecast](#) using cash budgets in the cash flow table.
- Create your first scenario for a different cash situation - [here's how!](#)

3 Manage your clients

- Use your dashboard to manage your clients. When you log into Float, you can easily see all the clients you have on Float, and move between them.
- Add another client by clicking 'Add a company' in Float.
- Show Float to your client! We always recommend that your client has some involvement in creating their cash flow forecast.
- [Export a PDF](#) report to show your clients their forecast from the cash flow tab in Float, just above the graph.

4 Learn more

- Book a 1-1 demo of Float with one of our product specialists. You'll get a link in an email from us!
- Join a Float [training webinar](#) to keep up to date with any new features.
- Visit Float's [help center](#) to learn more!

HAVE A QUESTION?

You can get in touch with us straight from Float using the chat icon in the bottom right hand corner. You can also email us at support@floatapp.com or check out our [help center](#)!