

Welcome to Breathe

Finance user guide





Welcome to Breathe

A very warm welcome to Breathe.

Your company has joined thousands of other SMEs in ditching those spreadsheets and switching to easy-to-use HR software.

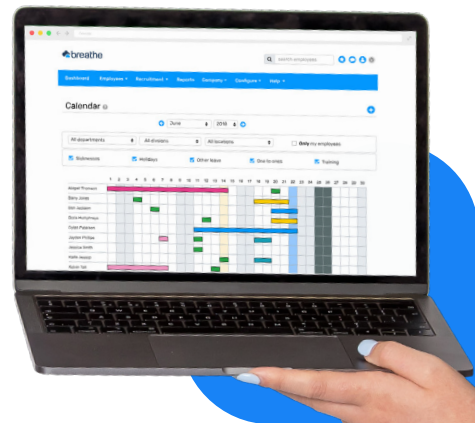
Breathe is designed to save you valuable time so that you can focus on what matters: putting people first and driving your business forward.

How this guide will help you

This guide will equip you with everything you need to feel confident using Breathe and help you get the most out of the system.

This is your go-to Breathe manual. It will walk you through what you can see and do within your account as a Finance User.

This handy guide is also here to answer any system queries that you might have along the way.





What's inside

In this guide, we'll walk you through each of Breathe's features. Here's what's in store:



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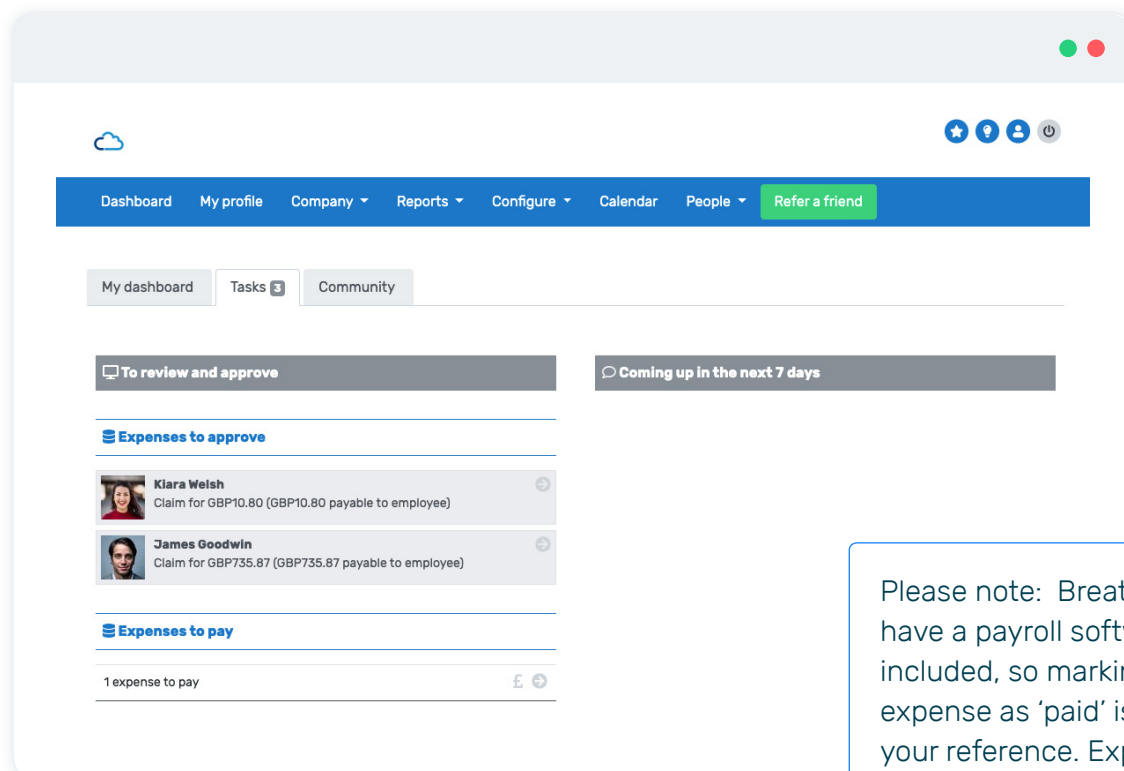
STAGE 1

Dashboards

The dashboard is the first thing you'll see when you log into Breathe.

Here, you'll see a summary of any tasks that need completing and any events that are coming up.

You can action these tasks by clicking on the arrow on the right hand side.



Please note: Breathe doesn't have a payroll software included, so marking an expense as 'paid' is only for your reference. Expenses will need to be paid via your payroll software.

Our top tips

- You are able to approve the expenses directly from this page, simply select the arrow and to will take you to the relevant screen to check and approve the details of the expense.





STAGE 1

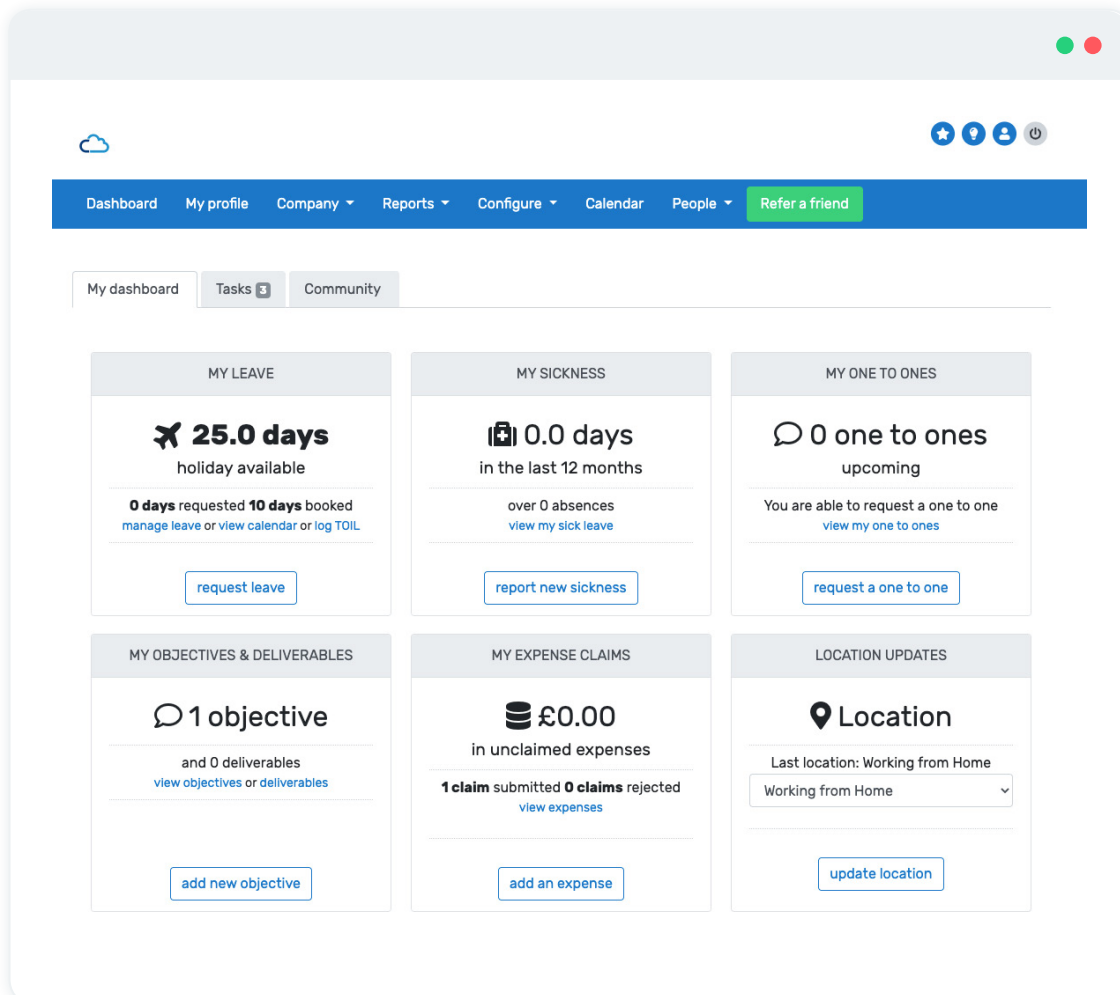
Dashboards

My dashboard

The next part of the dashboard is the 'My Dashboard' area. Here you can make requests and submit information relevant to you as a team-member.

This is where you'd go to request leave, update your location, read a document, submit an expense plus much more.

Why not take a look around and get familiar with your dashboard?





STAGE 2

My profile

Your profile is where all of **your** information is stored. This includes:

- Leave booked, taken and available
- Sickness
- Training
- Performance
- The 'More' tab

You'll also notice the 'Personal' tab – your personal details (salary, sensitive info etc.) are stored securely here. Don't worry - this can only be seen by you and the HR users within your account.

The screenshot displays the 'My profile' page for Kiara Welsh, a Finance Consultant. The navigation bar includes 'Dashboard', 'My profile', 'Company', 'Reports', 'Configure', 'Calendar', 'People', and 'Refer a friend'. The profile header shows a photo, name, and role, with tabs for 'Profile', 'Leave', 'Sickness', 'Training', 'Performance', and 'More'. The 'Profile' tab is active, showing a grid of metrics: Available holiday (25.0 days), Leave requests (0), Sickness (12M) (0.0 days), and Objectives (1). Below this is a tabbed interface with 'Email notifications' selected, highlighted by a blue arrow and the text 'YOU'RE IN CONTROL'. The page also shows 'BASIC INFO' and 'CONTACT DETAILS' sections.

While you're here, head over to the '**Email notifications**' tab and make sure that your email notifications are switched on.

This will ensure you're kept in the loop and receive any updates or requests from your team. (These will show on your dashboard too, of course)



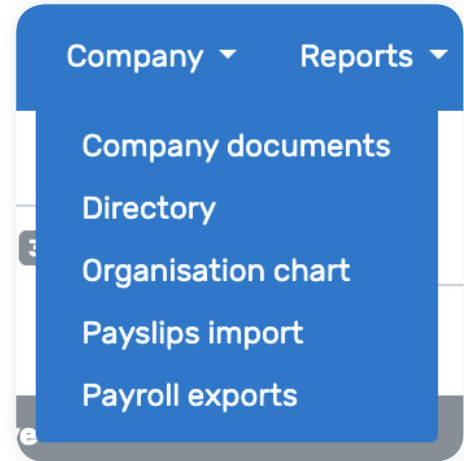
STAGE 3

The 'Company' tab

The 'Company' tab holds all your organisation-specific information, including:

- Company announcements
- Documents
- Company goals
- Employee directory
- Holiday calendar
- Organisation chart

These details are all determined by the HR user(s) and are a useful point of reference.



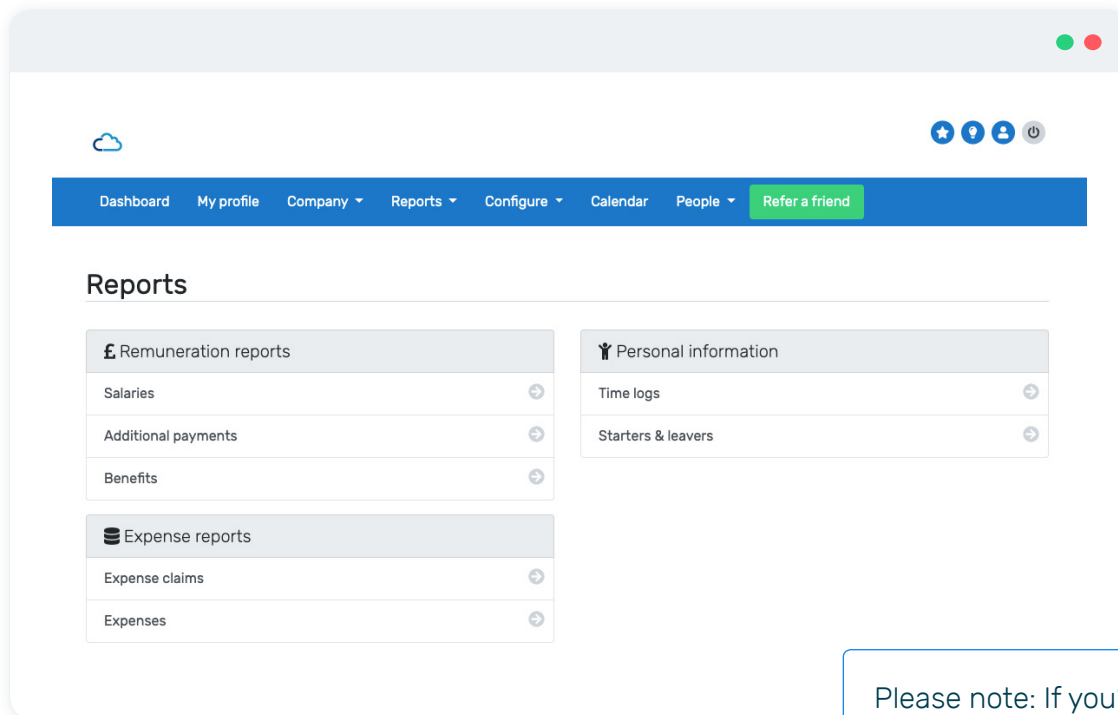


STAGE 4

Reports

Breathe allows you to run a variety of different reports relating to your organisation's finances.

Head over to the 'Reports' tab to see what you can do.



Please note: If you're logging in and not seeing all these reports available, then you'll need to get your HR user to make changes to your settings.

Our top tips

- Time logs and expenses are modules that need to be activated. Your HR user can do this under **Configure > settings > account > modules**. Time logs is available on our Starter plans or above and Expenses on the Regular plans or above and even better news...They are free of charge!



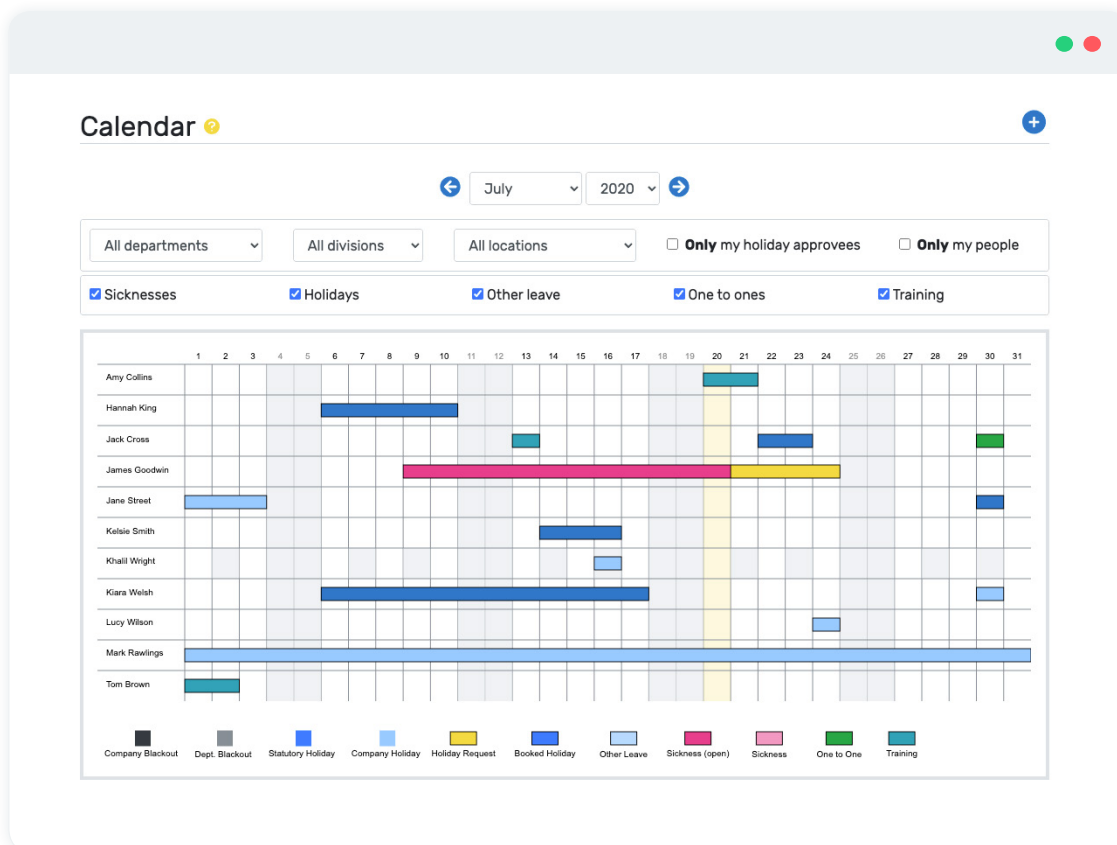


STAGE 5

The holiday calendar

Your calendar provides a useful overview of any events that are coming up, such as holiday booked, training events or one-to-ones. You'll also be able to see any that you've sickness logged (you won't be able to see anyone else's).

You may notice that not all of your people appear on the calendar at any one time. The Breathe calendar likes to keep things simple and uncluttered – it only shows people who have an event booked within Breathe or have been off sick. If an employee has nothing booked, they won't appear on your calendar.



Our top tips

- Request leave directly from the calendar page by pressing

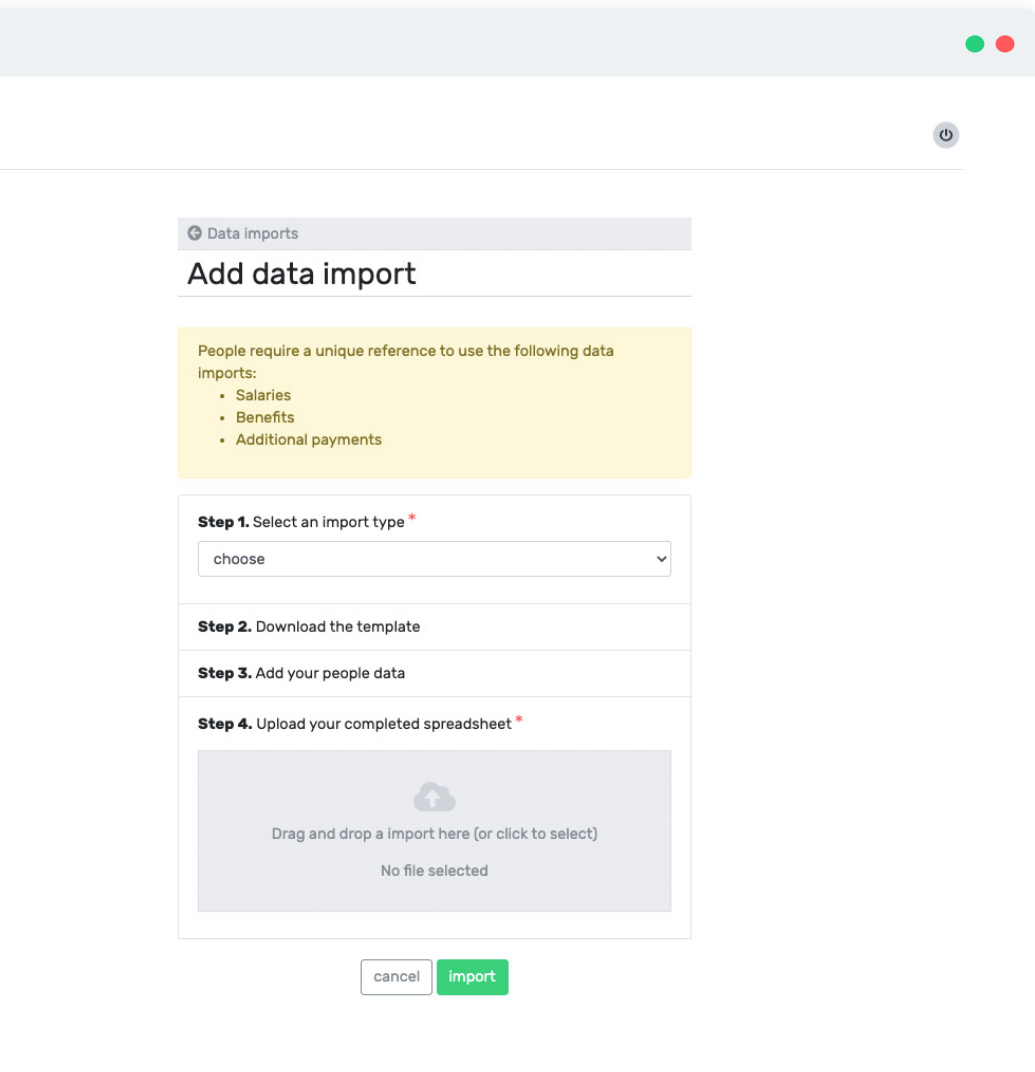


STAGE 6

People

Head to **People > list** to see a list of people in your organisation.

You can access someone's profile by using the arrow in the 'Actions' column or clicking on their profile picture. This will show you the basic information you need as a Finance user.



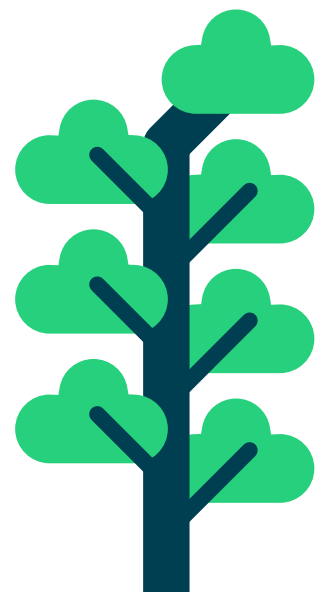
Uploading data in bulk

Under the 'People' tab there is also a 'Data' option.

Here, you'll find bulk useful spreadsheets to help you upload data in bulk, such as salaries, benefits, bonuses or pension information.

Our top tips

- The fields marked with a "*" must be filled in
- You cannot add, edit or move the columns in the upload spreadsheets. These need to be populated as they are for a successful import.





STAGE 7

Expenses

The Expenses module is available on the Regular plan or above.

[Beathe plans & pricing](#)

This can be activated by the HR user by heading to Configure > settings > account > modules > expenses.

It's included in your plan, so why not try it out?

As a finance user you'll have access to the Expenses module. This'll help you organise payments, as well as approving expense claims if this lies within your role.

And, for a handy overview of current expense claims, head over to the Reports tab. Here you'll see all open claims in once place and can mark them as 'paid'. You can also see a historical report of all expense claims.

To run you through how to use the expenses module, here are some helpful guides we put together.

[Expenses overview guide](#)

[Expenses reports guide](#)

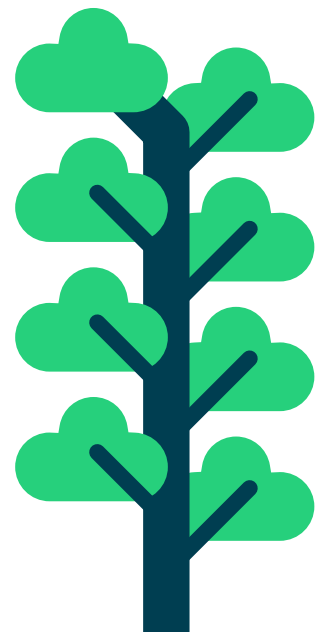
The screenshot shows the 'Expense claims' page with the following filters: All departments, All locations, 13/05/2020 to 12/06/2020. Under 'State', Submitted, Approved, Rejected, and Completed are checked. Under 'Employee Type', Employees, Contractors, and Volunteers are checked. 'Include leavers' is unchecked. There are 'clear filter' and 'apply filter' buttons.

Search:

Name	Department	Date submitted	Date approved	Approver	Net	VAT	Gross	Paid to employee	Status	Actions
Amy Collins	Operations	11/06/2020	11/06/2020	Kiara Welsh	-	-	£115.94	£115.94	A	⋮
James Goodwin	Client Accounts	11/06/2020	-	Amy Collins	-	-	£735.87	£735.87	S	⋮
Kiara Welsh	Finance	11/06/2020	-	Amy Collins	-	-	£10.80	£10.80	S	⋮

Showing 1 to 3 of 3 entries

Previous 1 Next





STAGE 8

Time logs

The Time Logs tool is a great way of recording:

- Hours worked as overtime
- Time spent working on a specific project

People in your organisation can access this in their dashboard if they need to record any hours worked.

As a finance user you can process any time logs and determine whether they are to be paid or added as leave.

You can export this information using the Reports tool and send it across to payroll.

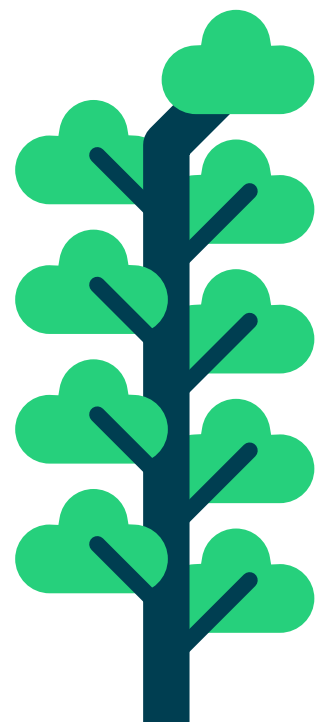
Here's a useful guide with more information on time logs.

[Time logs](#)

Name	Department	Date	Description	Duration	Project	Is overtime?	Is processed?	Actions
Klara Welsh	Finance	11/06/2020	Extra project work	3 hours	-	Yes	No	

Our top tips

- Time logs is to log extra hours worked only
- It is designed to log hours on a daily basis only. It won't let you log several days' worth of hours in one go.





STAGE 9

Other helpful tools

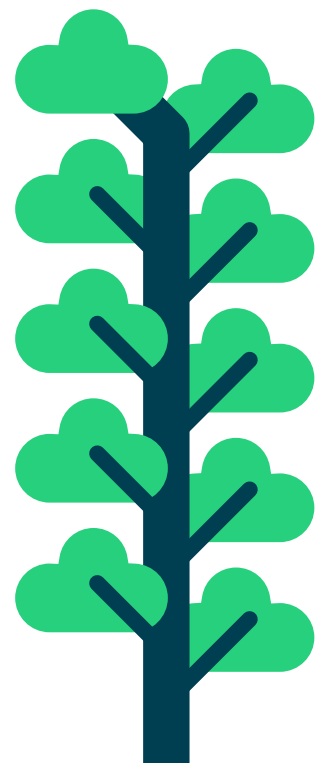
Latest Kudos

Fatima Sohal Went the extra mile 1	Barry Jones Saved the day 0
That presentation was amazing! Well done	Helping me sort out the printer
Doris Humphreys at 19/06/2018	Doris Humphreys at 19/06/2018
Abigail Thomson Made my day easier 1	Karla Jessop Great Service 2
Thank you for your help with the project, great to be able to deliver on time 😊	Karla is very empathetic when it comes to listening and makes each client feel important.
Dylan Paterson at 06/10/2018	Doris Humphreys at 30/04/2018

Kudos

If you want to spread some good vibes around your team, why not use the Kudos feature and let someone know that they've done something great. It's a great way to say "thanks" and put a smile on their face.

[Kudos guide](#)





Thank you!



Thank you for being a part of our paperless revolution, by using Breathe you are helping contribute to the saving of 3,974,880 sheets of paper per year. That's 477 trees, or 7950 reams of paper.

And, even better, using Breathe will give you back precious time.

Every week, up to 24,276 hours are saved. Every year, up to 1,262,352 hours are saved. That's just under 4 hours per week per customer.

How will you use the extra time?



*WE HOPE YOU ENJOY USING
BREATHE AS MUCH AS WE
LOVE DEVELOPING IT!*

 **breathe** Effortless people admin

More resources online at breathehr.com