

# UUSD Members & Friends: Welcome to Breeze!

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## What is Breeze?

Breeze is an online Church Management System that maintains our database of names, addresses, phone numbers, etc. It also manages our recording of pledges and contributions and handles our online giving.

## Is Breeze easy to use?

Yes, Breeze is very easy. You can launch Breeze from a Web browser at <https://uusd.breezechms.com/r/dashboard> or from the Breeze app for your smartphone or tablet.

## Who may use Breeze?

Only UUSD Members and Friends can have access to Breeze.

## Who is the Breeze Admin?

The UUSD Office Administrator, Sandy Scheet-Robitaille. Email her at [admin@uusd.org](mailto:admin@uusd.org) or call at 302-313-5838.

## Member Tutorial Video

You may find it helpful to watch this 2-minute overview provided by Breeze.

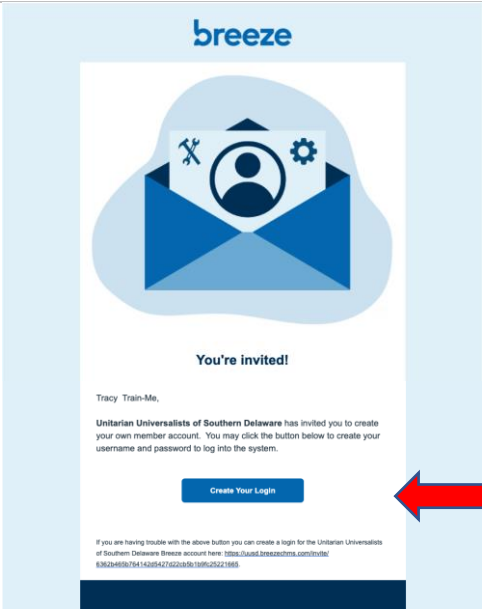
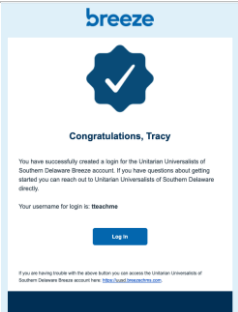
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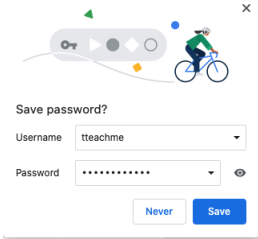
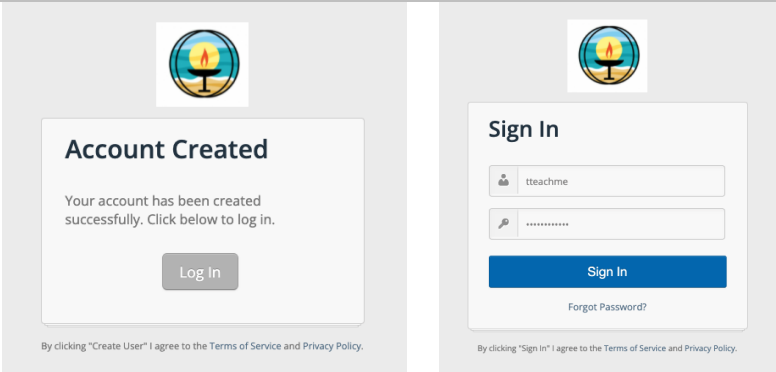
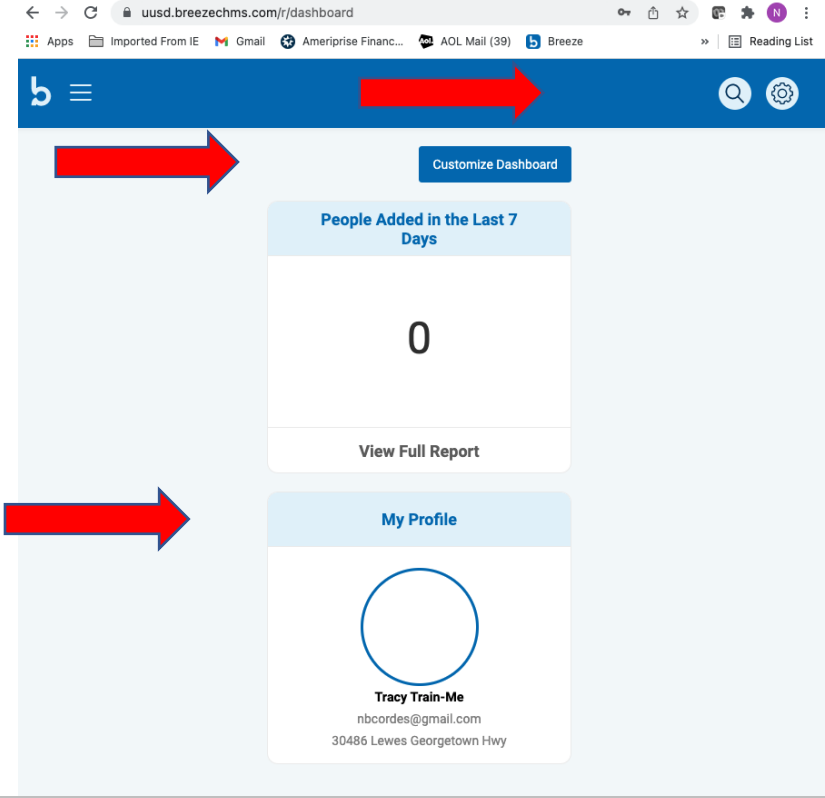
*Note that we are not using all of the features. A detailed, step-by-step guide is provided below.*

## How do I get access to Breeze?

I will invite you to create a UUSD Breeze account. You will receive an email from Sandy via breezechms.com, with the subject line: *Create your Unitarian Universalists of Southern Delaware Breeze account.*

To illustrate the process, a “Friend” named **Tracy Train-Me**, was created. You can follow her experience below (UUSD Members and Friends have identical access to Breeze):

<p>Once you receive your email invitation to Breeze, click on “Create Your Login” which brings you to the secure Breeze “Create User” page</p> <p>Choose your own Username and Password and click Create User. (Your Admin will only be able to see your Username, so keep track of your Password.)</p>	
<p>You can expect to receive a Congratulations email from Breeze but you do not need this to continue.</p>	

<p>Depending on your browser (Chrome is the preferred browser for Breeze), you may be able to save your password to your system. This is NOT a Breeze requirement.</p>	
<p>Click on <a href="#">Log In</a>.</p> <p>Enter your information and click on <a href="#">Sign In</a></p>	
<p>Your homepage (Dashboard) will look something like this.</p> <p>The red arrows point out where to click for:</p> <ul style="list-style-type: none"> <li>• <a href="#">Search</a></li> <li>• <a href="#">Customize Dashboard</a></li> <li>• <a href="#">My Profile</a></li> </ul>	

## Quick Links:

breeze

Dashboard

People

Tags

My Profile



Dashboard = Home

People = populates the name and photo (if available) of all the people in categories: Member, Friend, Staff, and Nonmember Spouse/Partner. You will be able to view their non-private Directory information.



= Search

My Profile = your profile

Tags = a section will we use in the future

## Which fields can I update myself?

Hover over any [blue bar](#) and [click to edit section](#). (If something is incorrect and you are not able to change it, please email [admin@uussd.org](mailto:admin@uussd.org) with your request.)

**Once you have made changes, you must click [Save](#) in the blue box!**

You can try clicking on and updating all the sections, but there will be some fields you can change, some you can view, and some that contain no information. **IMPORTANT NOTE:** What you can view/change in your own

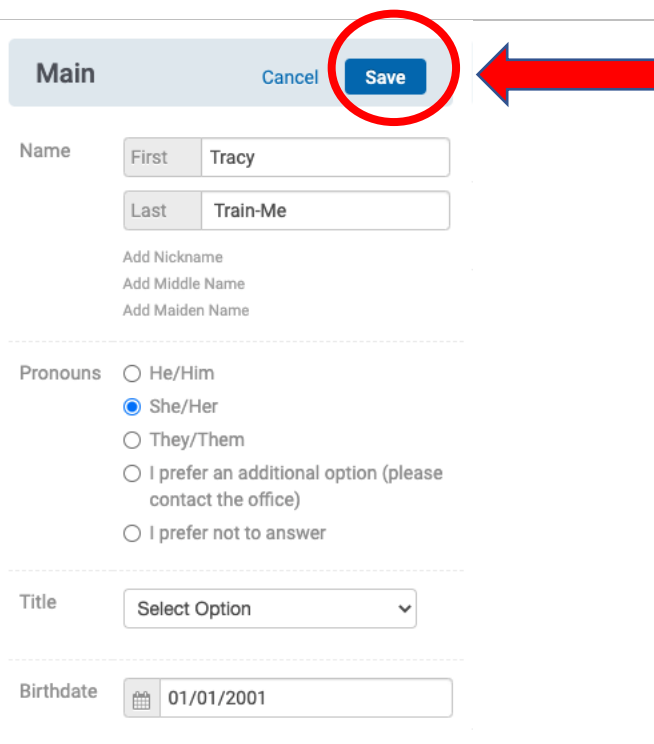
The screenshot shows the 'My Profile' page for Tracy Train-Me. The profile card at the top includes a photo placeholder, the name 'Tracy Train-Me', a phone number '(302) 827-1208', and an address '30486 Lewes Georgetown Hwy, Lewes, DE 19958'. Below the card are several sections: 'Main' (with a 'click to edit section' link), 'Contact' (with fields for Name, Home, Email, and Address), 'Family' (with a note 'No information stored'), 'Emergency Contact' (with a note 'No information stored'), and 'UU Affiliation'. A red arrow points to the 'Main' section header, and a green arrow points to the 'Address' field in the 'Contact' section.

(see below for "green arrow" Directions references)

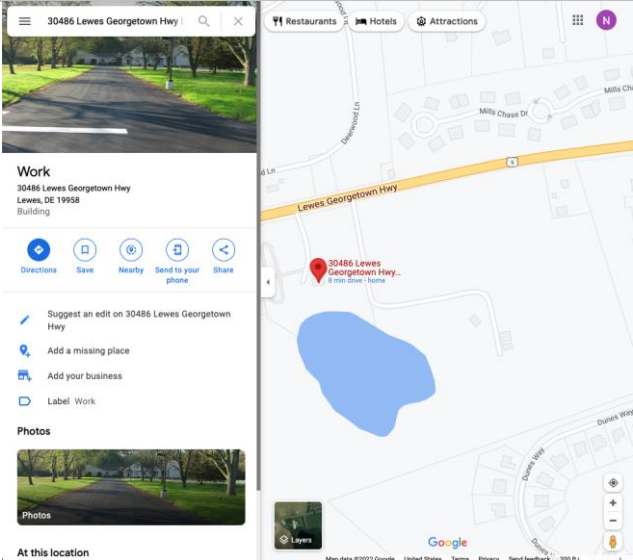

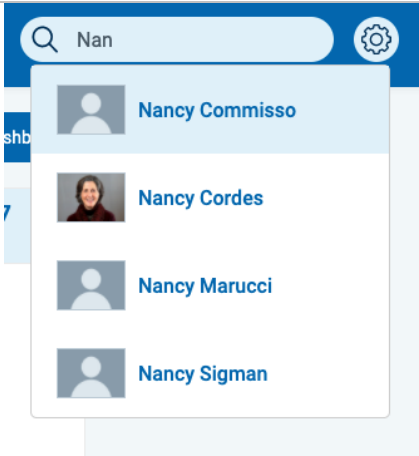
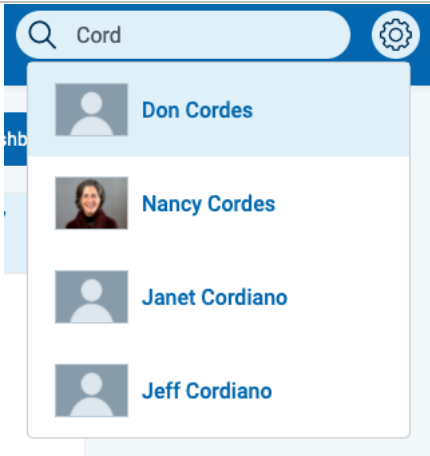
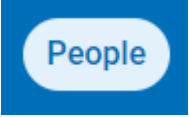
profile is NOT what you can view in the profiles of other Members and Friends! For others, you can only view “Directory” information that has NOT been made private. In Tracy’s profile - since she has opted to make her email address private, she can view that information, but it will not appear when others view her profile.

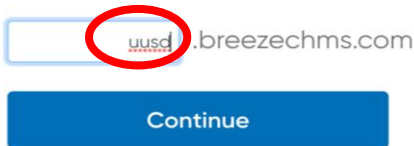
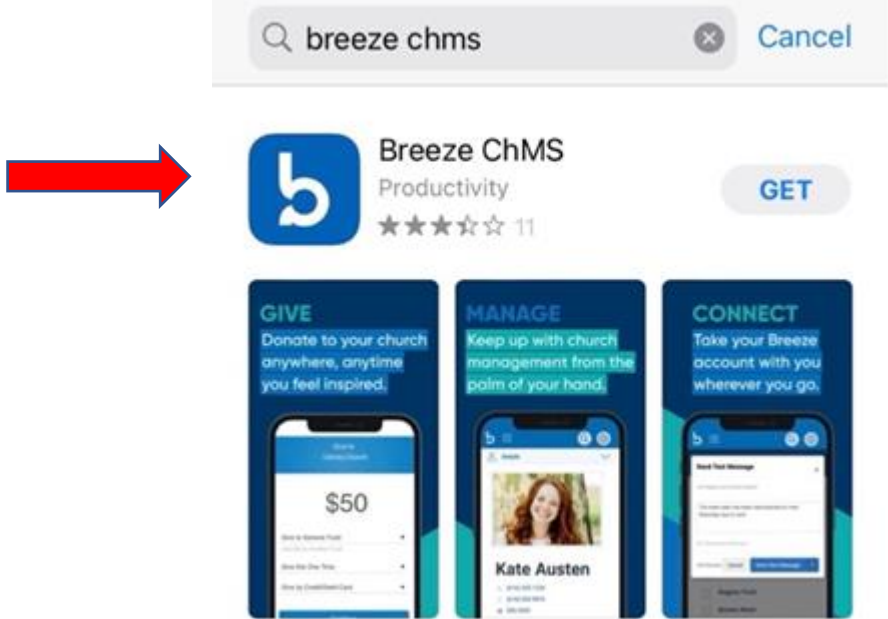
**Always remember to **Save** your changes!**

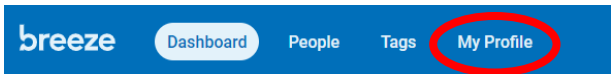
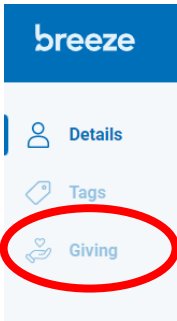

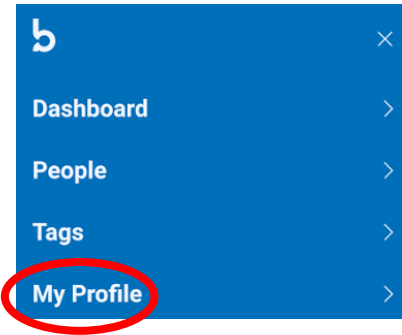
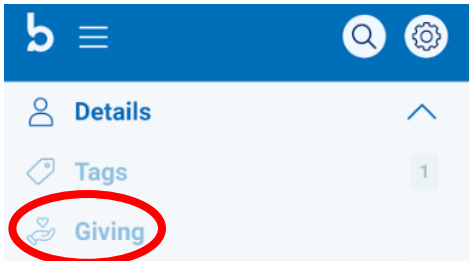
Note: UUSD doesn’t use titles, so the “Title” section only includes the options Rev., Dr., and Rev. Dr.





The screenshot shows a user profile edit form. At the top, there is a header bar with the word "Main" on the left, a "Cancel" button in the center, and a "Save" button on the right. The "Save" button is circled in red, and a large red arrow points to it from the right. Below the header, the form is divided into sections. The first section is "Name", which includes input fields for "First" (containing "Tracy") and "Last" (containing "Train-Me"). Below these are links for "Add Nickname", "Add Middle Name", and "Add Maiden Name". The second section is "Pronouns", which includes radio button options: "He/Him", "She/Her" (which is selected), "They/Them", "I prefer an additional option (please contact the office)", and "I prefer not to answer". The third section is "Title", which includes a dropdown menu labeled "Select Option". The fourth section is "Birthdate", which includes a calendar icon and an input field containing "01/01/2001".

<p>Birthdate is an example of a private, optional field.</p>	
<p><b>Directions to an Address</b></p> <p>Clicking on either address field (referenced with <b>green arrows</b> above) opens a new window in Google Maps – a handy tool that is familiar to many.</p>	
<p><b>Simple Search Tool</b></p>  <p>As you start to type, you will see options that match. You can search by first or last name. Click on the person you are searching for.</p>	<div style="display: flex; justify-content: space-around;"> <div data-bbox="331 858 747 1310">  </div> <div data-bbox="800 858 1227 1310">  </div> </div> <p>There is a maximum of 8 names shown with the simple search on the top right.</p>
<p><b>People Search</b></p> 	<p>With the People mode on the top left, you can perform searches using name and many other data fields.</p>

<p><b>UUSD's Breeze Web Address</b></p> <p>When using Breeze on a device for the first time, you may be asked to “<a href="#">Enter your church's Breeze web address.</a>” This will always be <b>uUSD</b></p> <p>Breeze will then remember your church ID when you are using that device.</p>	<p>Enter your church's Breeze web address</p> 
<p><b>Can I use the Breeze app on my smartphone or tablet?</b></p> <p>In your App store, search for “<b>breeze chms</b>”</p> <p>The Breeze app is free.</p> <p>Install on your device as you would any other app.</p> <p>Open the Breeze app.</p> <p>Enter your Breeze username and password.</p>	
<p><b>Can I call and email people directly</b></p>	<p>In your smartphone, just click on a phone number and call directly from your phone (just like you use “Contacts” in your phone).</p>

<b>through Breeze?</b>	You should <b>NOT</b> email someone directly from their listing. You can, but it will not show up in your personal email account (Gmail, Yahoo, etc.). Instead, copy and paste someone's email address into your email app.
<b>Giving Information</b>	UUSD Breeze users can view their contributions and pledge, if applicable, to UUSD. This makes it very easy to monitor your contributions and progress towards fulfilling your pledge. Contributions for any month should be recorded and visible by the 15 <sup>th</sup> of the following month. Contact your UUSD Finance Officer(s) for questions about Giving.
Navigation (Web)	<p>On the top menu, click My Profile.</p>  <p>You'll then see Giving on the left vertical menu on your profile page. Click Giving.</p> 
Navigation (App)	<p>Click the  icon (app) and then click My Profile</p> 
	<p>On your profile screen, click the ▼ control and click Giving.</p> 

Setting your date range	<div><div>GivingPledges</div><div><div>Show For</div><div>Start Date</div><div>End Date</div></div><div><div>Sprunger Family</div><div>01/01/2023</div><div>06/02/2023</div></div><div>Download as E</div></div> <table><tr><th>Date</th><th>Name</th><th>Fund(s)</th><th>Method</th><th>Check #</th><th>Note</th></tr></table> <p>Giving tab is selected by default. With the controls above, set your Start and End dates for seeing your detailed giving data. The default range is the current calendar year through today.</p> <p>Click the Pledges tab to see your pledges, if any.</p>	Date	Name	Fund(s)	Method	Check #	Note
Date	Name	Fund(s)	Method	Check #	Note		
Giving details	<div><div>GivingPledges</div><p>Giving details are listed below the date range settings.</p><p>Date: Date of recorded contribution Name: Name of contributor (check signer or Vanco (online) account) Fund(s): Pledge, Share the Plate, Minister’s Discretionary Fund, etc. Method: Check, Vanco (online), etc.</p><p>Funds Overview: Totals by fund for date range—Pledge, Share the Plate, etc. Method Overview: Totals by method for date range—Check, Vanco (online)</p></div>						
Pledge details	<div><div>GivingPledges</div><p>Your pledge, if applicable, will display with Paid, Pledged, Remaining, and Percent Complete.</p></div>						
Profile Details	<p>Return to your main profile with Details on the left.</p> <div><div>breeze</div><div><div>Details</div><div>Tags</div><div>Giving</div></div></div>						

<b>Giving through Breeze</b>	UUSD Breeze users can give to UUSD when logged on to Breeze, either with the Web or the Breeze app.
Give Now	After logging on to Breeze, you'll see <b>Give Now</b> at the top (Web) or <b>Give Now</b> under the  control. Click <b>Give Now</b> to launch the giving form. Set your amount.
Fund	Select Pledge, Share the Plate, etc. Click <u>Add Gift to Another Fund</u> to give to multiple funds with one transaction.
Frequency	Select to give One Time or set a recurring contribution. Your recurring contribution will continue until you cancel it.
Payment Method	Select to give with credit card or ACH (bank transfer).
Payment Details	Enter your name, address, and account information. Comments are optional. Click the checkbox to include the amount stated to cover the processing fees, if desired. Click <b>Give</b> .
<b>Giving with Text to Give</b>	<p>UUSD's unique Text to Give number is <b>(302) 321-1707</b>. This option works for anyone, including visitors. Your first time will require setting up your identity and payment method. Text to Give is convenient because you will only need to set up your identity and payment method the first time. Unless you need to change it, subsequent giving can just use one of the examples below.</p> <p>Here are text examples for giving:</p> <ul style="list-style-type: none"> <li>• <b>give</b> -- Breeze will respond by asking you the amount</li> <li>• <b>\$20</b> -- \$ is optional, the contribution defaults to your pledge, if applicable</li> <li>• <b>15 stp</b> -- \$15 towards Share the Plate</li> <li>• <b>15 other</b> -- \$15 towards Other for visitors and those without a pledge</li> <li>• <b>\$20 pledge</b> -- \$20 explicitly towards your current year pledge</li> <li>• <b>refund</b> -- Refunds the previously given contribution</li> </ul>
<b>Managing Recurring Gifts</b>	In the Web and app versions you'll find the  <b>Recurring Gifts</b> control. If you have a recurring gift, you'll see it listed. Select <b>Manage Recurring Giving</b> , make your changes (including Stop if desired), and click <b>Save</b> .
	All recurring giving receipt emails from Breeze provide the link at the bottom that says, "click here to manage recurring settings." That link will also take you to where you can manage your recurring giving. Use this if you don't have access to Breeze (Web or app).
	See this Breeze help page for more detailed instructions: <a href="https://support.breezechms.com/hc/en-us/articles/360046374654">https://support.breezechms.com/hc/en-us/articles/360046374654</a> .
<b>Managing Payment Methods</b>	In the Web and app versions you'll find <b>Payment Methods</b> in the menu under <b>Give Now</b> . Click the "x" out to the right of an old method to delete the saved payment method, if desired.

<p><b>Questions?</b></p> <p>Reach out to the UUSD Office Administrator, Sandy Scheet-Robitaille with any questions at <a href="mailto:admin@uusd.org">admin@uusd.org</a> or 302-313-5838.</p> <p>Printed copies of these instructions are available by request.</p>	