

# UUSD Members & Friends: Welcome to Breeze!

Sandy Scheet-Robitaille, Office Administrator

## What is Breeze?

Breeze is an online Church Management System that UUSD began using in 2021. As a database, it holds our names, addresses, phone numbers, etc. As a church management system, Breeze can be used to track charitable giving, committee and group involvement, attendance, program registration, and much more. Currently at UUSD, we are using Breeze for our Church Directory.

## Is Breeze easy to use?

You can add the free Breeze app to your smartphone or tablet and use it “on the go” or you can access it from home using your computer.

## Why is Breeze better than the Church Directory?

- You can search for church Members and Friends using any part of their first or last name.
- You can update your own basic profile information.
- If you’re using the Breeze app on your smartphone, you can easily call someone by clicking on their phone number.
- You can get directions to people’s homes directly from their profile.
- Breeze is always current. If you or the Sandy make a change to any field in your profile (i.e., email address, mailing address, phone number, etc), the information is immediately updated and available to all authorized users.
- There’s no need to print a multi-page directory that becomes outdated as soon as anyone makes a change to their profile.

## Who may use Breeze?

Only Members and Friends have access to Breeze. Sandy will invite you to set up a username and password and, as soon as you create your Breeze account, you will have instant access to the database.

## Who is the Breeze Admin?

The UUSD Office Administrator, Sandy Scheet-Robitaille. Email me at [admin@uusd.org](mailto:admin@uusd.org) or call her on 302-313-5838. Her office hours are M-Th, 9am -2pm.

## Member Tutorial Video

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

<https://support.breezechms.com/hc/en-us/articles/360007855153>

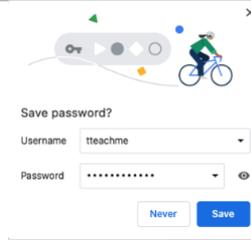
*Note that we are not using all of the features. A detailed, step-by-step guide is provided below.*

## 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.*

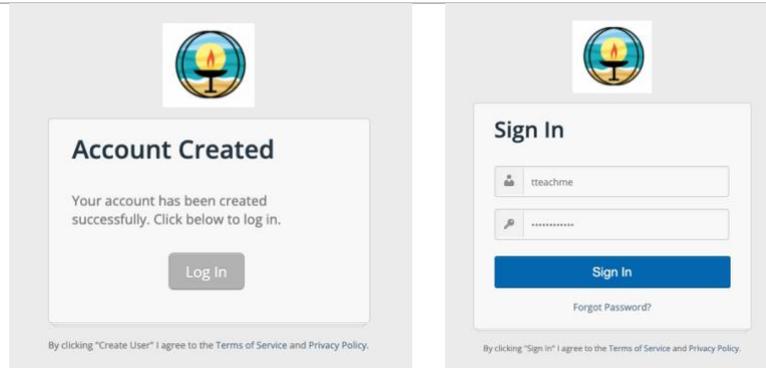


Depending on your browser (Chrome is the preferred browser for Breeze), you may be able to save your password to your system. This is NOT a Breeze requirement.



Click on [Log In](#).

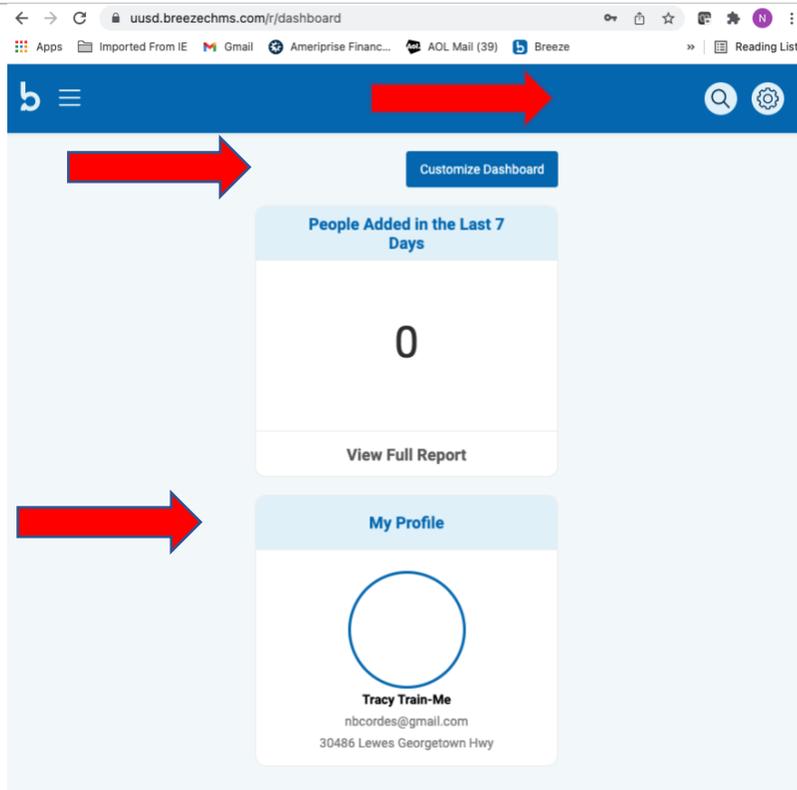
Enter your information and click on [Sign In](#)



Your homepage (Dashboard) will look something like this.

The red arrows point out where to click for:

- [Search](#)
- [Customize Dashboard](#)
- [My Profile](#)



**Quick Links:**



**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

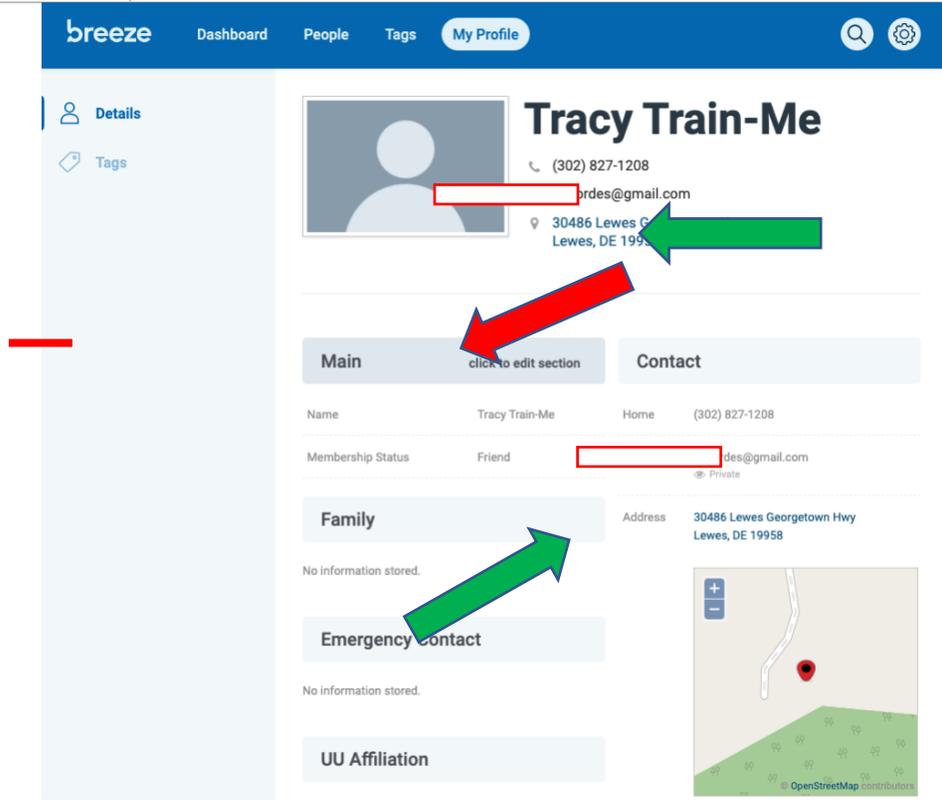
### Which fields can I update myself?

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@uusd.org](mailto:admin@uusd.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 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



(see below for "green arrow" Directions references)

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.

Birthdate is an example of a private, optional field.

**Main** Cancel

Name

First Tracy

Last Train-Me

Add Nickname  
Add Middle Name  
Add Maiden Name

Pronouns

He/Him

She/Her

They/Them

I prefer an additional option (please contact the office)

I prefer not to answer

Title

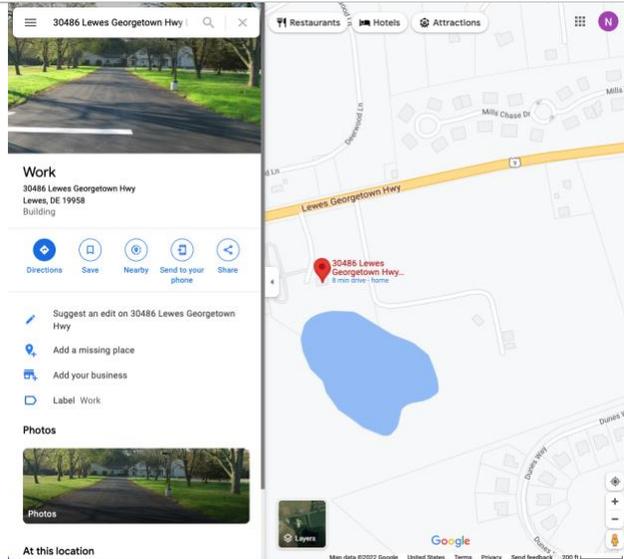
Select Option

Birthdate

01/01/2001

## Directions to an Address

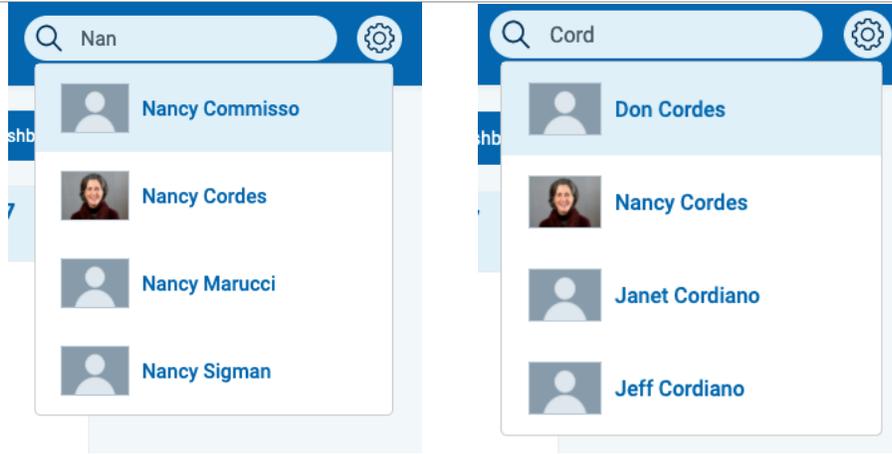
Clicking on either address field (referenced with **green arrows** above) opens a new window in Google Maps – a handy tool that is familiar to many.



## Simple Search Tool



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.



There is a maximum of 8 names shown with the simple search on the top right.

## People Search



With the People mode on the top left, you can perform searches using name and many other data fields.

## UUSD's Breeze Web Address

When using Breeze on a device for the first time, you may be asked to "Enter your church's Breeze web address." This will always be **uUSD**

Enter your church's Breeze web address



Breeze will then remember your church ID when you are using that device.

**Can I use the Breeze app on my smartphone or tablet?**

As long as your device has internet access, you can use Breeze on your device.

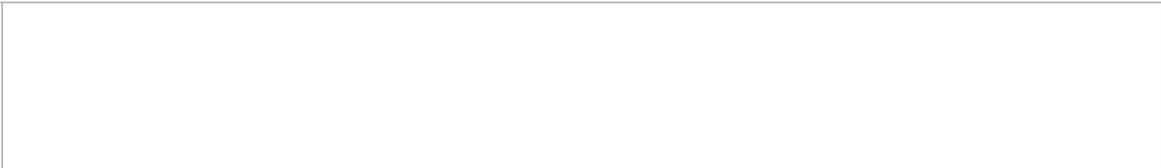
In your App store, search for “**breeze chms**”

The Breeze app is free.

Install on your device as you would any other app.

Open the Breeze app.

Enter your username and password.

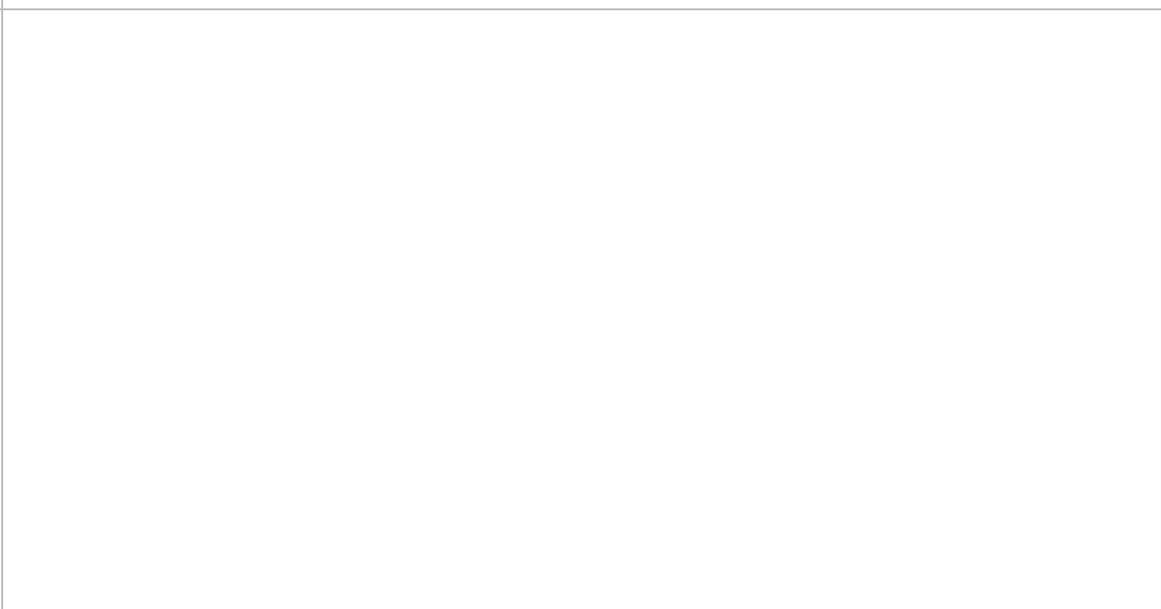


The screenshot shows an app store search interface. At the top, a search bar contains the text "breeze chms" with a "Cancel" button to its right. Below the search bar, two app listings are visible. The first listing is for "Breeze ChMS" by "Productivity", featuring a blue icon with a white 'b' and a 4.5-star rating. Below the listing are three preview images: "GIVE" (donation screen), "MANAGE" (church management screen), and "CONNECT" (login screen). A red arrow points from the left towards the Breeze ChMS listing, and another red arrow points from the right towards the same listing. Below the Breeze ChMS listing is the "Breeze Check In" app listing, which has a blue checkmark icon and a "GET" button. The bottom of the screenshot shows the app store navigation bar with icons for "Today", "Games", "Apps", "Arcade", and "Search".

**Can I call and email people directly through Breeze?**

In your smartphone, just click on a phone number and call directly from your phone (just like you use “Contacts” in your phone).

You should **NOT** 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.

**Giving Information**

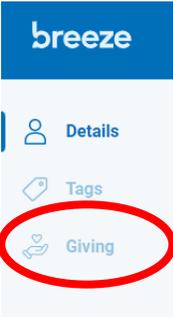
UUSD Breeze users can view their contributions and pledge, if applicable, to UUSD. This makes it very easy to monitor your contributions and progress towards fulfilling your pledge. Contributions for any month should be recorded and visible by the 15<sup>th</sup> of the following month. Contact your UUSD Finance Officer(s) for questions about Giving.

**Navigation**

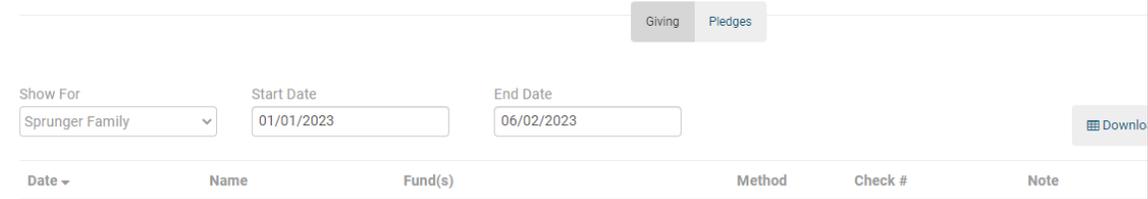
On the top menu, click My Profile.



You'll then see Giving on the left vertical menu on your profile page. Click Giving.

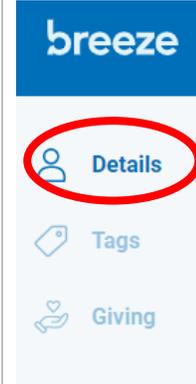


**Setting your date range**



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.

Click the Pledges tab to see your pledges, if any.

<p>Giving details</p>	 <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>
<p>Pledge details</p>	 <p>Your pledge, if applicable, will display with Paid, Pledged, Remaining, and Percent Complete.</p>
<p>Profile Details</p>	<p>Return to your main profile with Details on the left.</p> 
<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. (Remember that office hours are M-Th, 9-2.)</p> <p>Printed copies of these instructions are available by request.</p>	

