BREEZE TRAINING
for
WUU MEMBERS

WILLIAMSBURG
UNITARIAN UNIVERSALISTS
WILLIAMSBURG, VIRGINIA

A welcoming, witnessing, worshiping community.

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Introduction

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The Williamsburg Unitarian Universalists (WUU) have chosen Breeze software to be the platform for our Ministry's database. As such, Breeze will allow WUU leaders and members to use the on-line platform to perform many tasks. The following encapsulates those tasks:

1. Membership information: Each [member](#) or "friend" (person who attends regularly, participates and assists in the functioning of WUU but has not officially joined as a member) of WUU will update and maintain their membership record within Breeze. This includes the member's address, phone number, email address, and family members. WUU administrative staff will maintain other records, including attendance, volunteering, donations, and groups (tags) in which they are included.
2. New members and visitors will be added by the front office.
3. Scheduling events continues to be handled through the front office, but a calendar is included in Breeze and also populated to our web page.
4. Groups are called [TAGs](#) in Breeze. As such our congregational groups are housed under the TAG Icon. For example, the Hospitality Group is divided into the 7 Hospitality teams and the Hospitality Steering Committee and the Hospitality Team Leaders. You will contact the front office to add team members to teams.
5. Current Breeze Team Members include Dave Wilcox, Rev. Laura, Pat Russo, Suzanne Huddleston Barbara Chowning, and Cara Mandart.

The purpose of this document is to provide guidance in using Breeze including:

1. Adding an app to your Smart Phone or Tablet
2. Accessing Breeze from your desktop computer
3. Updating your information in Breeze to be sure that we have your correct personal data, including address, phone, family members, etc.
4. Explain how to allow other members to see your data or how to hide your data, and how not to appear in our membership directory.

Please feel free to contact Breeze Team Members for assistance.

Important Note: Once you receive your invitation to activate your account in Breeze, the invitation is good for 24 hours. If you unable to activate your account at that time, you must call or email the WUU Admin's office or a team member to be re-invited to join. We will be glad to help you!

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Adding an APP to your iPhone, iPad, Tablet, or other Smart phone

Breeze offers an app for iOS and Android!

Here's where you can access either of these apps: https://www.breezechms.com/mobile-app

Below is the screen showing your choice to open the app for either IOS (Apple) or Android.
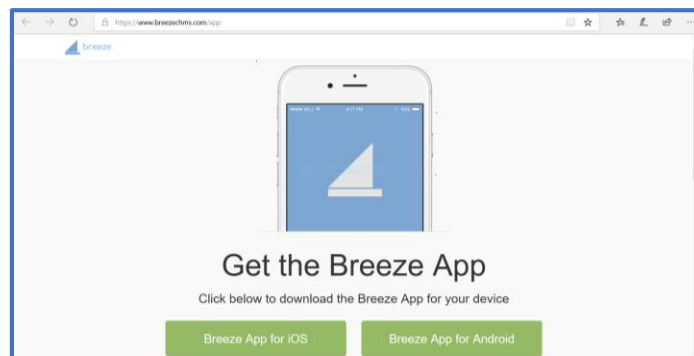

Figure 1-Download App from Breeze chms.

Or just go to your Smart device

1. Open App store
2. Type in breezechms
3. And download App to your device.
4. Our web page is https://wuu.breezechms.com
5. Use the email sent to you to log in

Accessing Breeze from your desktop

Breeze doesn't have a specific 'app' for Windows or Mac. Since Breeze is web-based, you can access it from any modern browser. You can go to your Breeze account login page and then mark that page as a favorite in your browser or add it as a bookmark so you can easily find it whenever you open your browser.

If you would like to access Breeze by simply clicking an icon in your taskbar (Windows) or Dock (Mac) you can use your r web browser to create a shortcut for easy access.

- Here are the instructions for Windows using Chrome: https://www.lifewire.com/create-shortcuts-in-google-chrome-for-windows-4103617
- Here are instructions for Mac OS: http://smallbusiness.chron.com/create-shortcuts-websites-desktop-mac-43053.html

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Activating your account

You will receive an email inviting you to create your own member account.

Figure 2-Create your Account Email
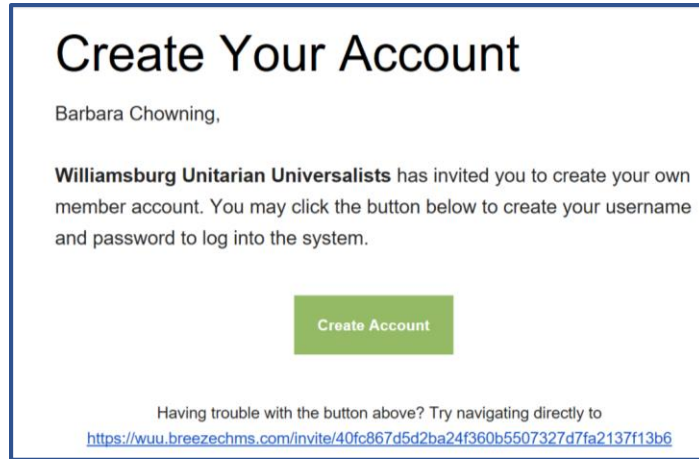
Failing to Log in on time

If you fail to timely respond to this request, you will receive the following message:
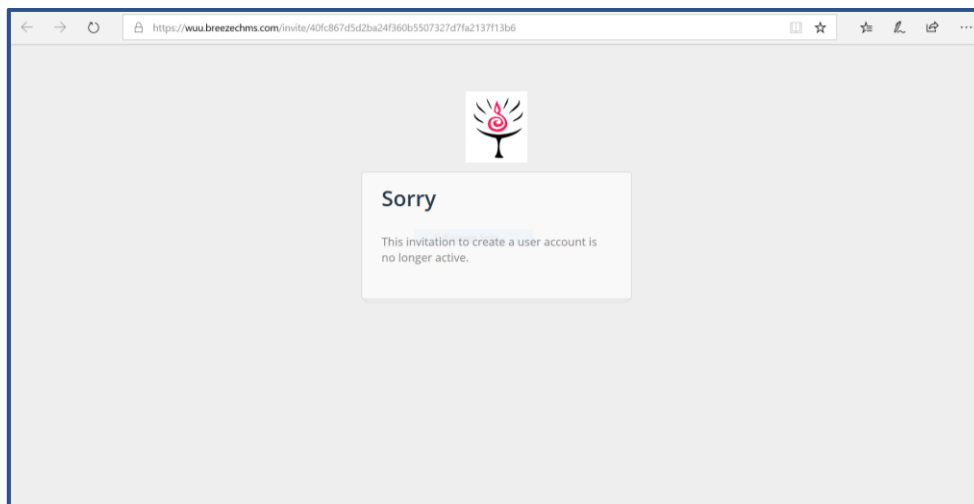

Figure 3-Failing to Log in on time

Creating your Account

Click on the Create Account button and you will choose a user name and password. Once you have completed this, you will receive a confirmation email as shown below and you can log into our website.
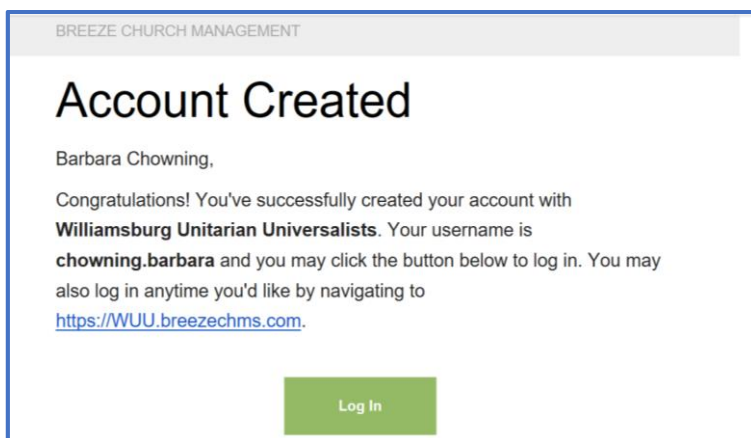
Figure 4-Confirmation Email

How to look someone up in the database

1. Log into Breeze
2. The screen below is the dashboard (the screen you see after logging in).

Figure 5-Breeze Dashboard

There are two ways you can look someone up in Breeze. The first way is to use the search feature on your Dashboard as shown below. However, we recommend that you use this function only when you know the persons name and how it is entered into Breeze (i.e. is the name Dave or David, etc.)

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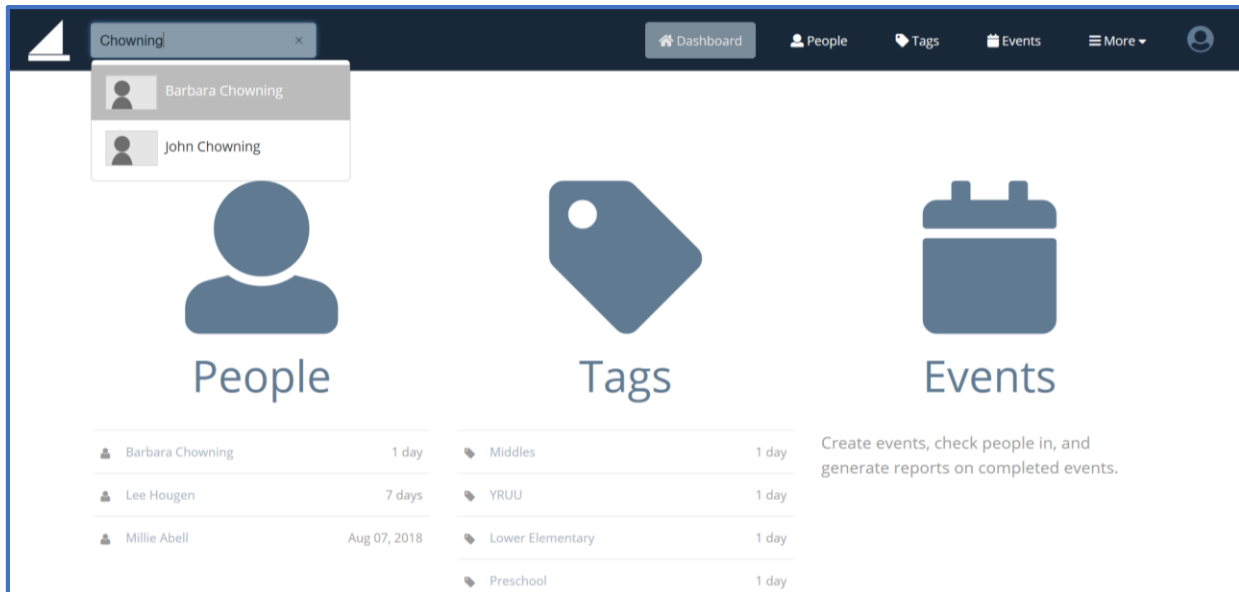
Figure 6-Searching for Person Using Dashboard

However, the **best way** to search for a person is to click on people either the big People Icon on the dashboard or by clicking on People on the top tool bar as shown below:

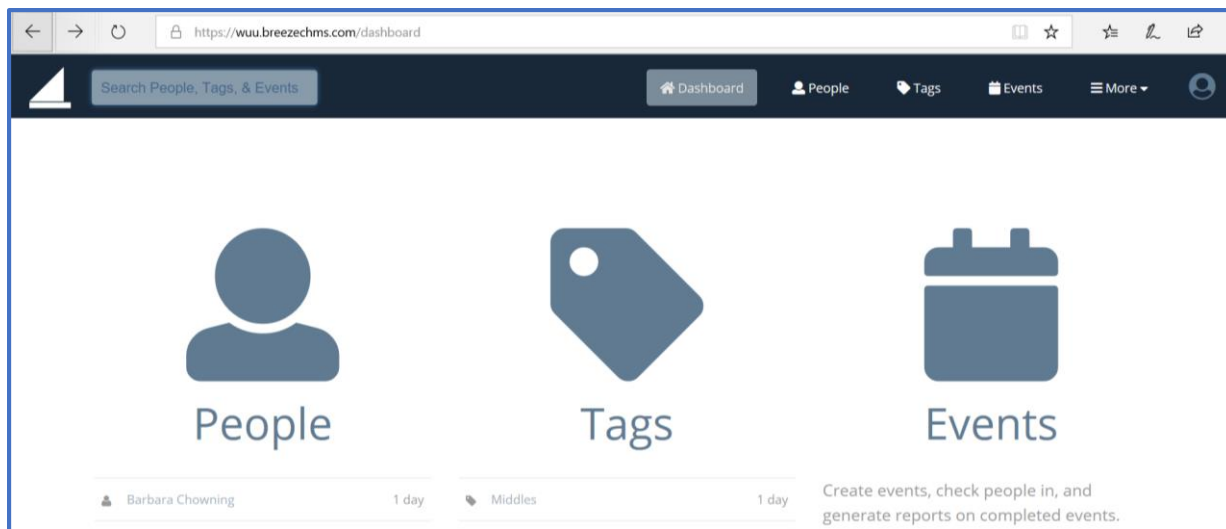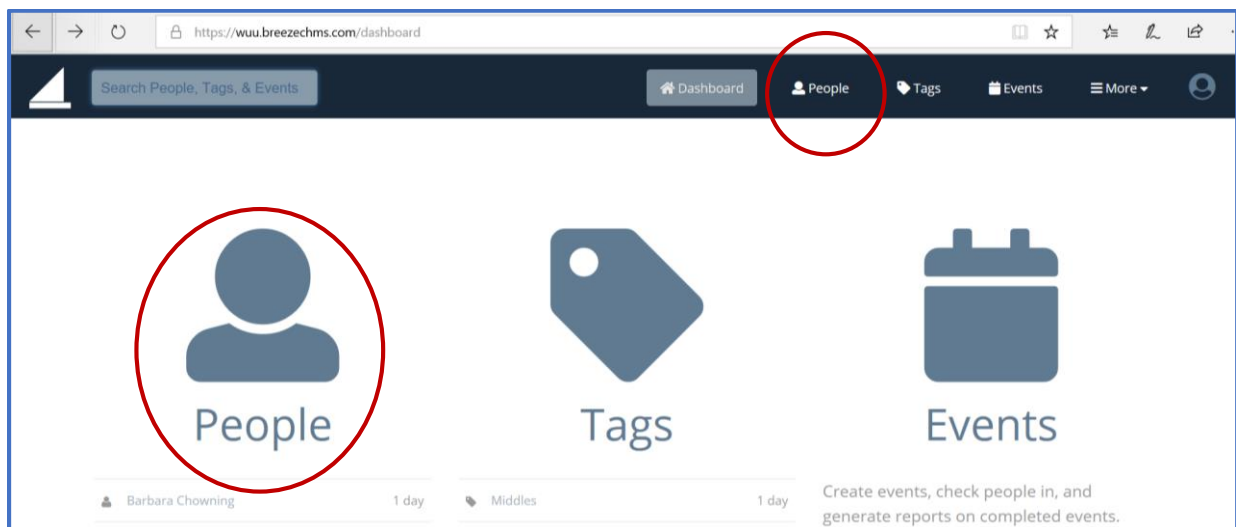*Figure 7-Using People on Dashboard or tool bar to search for people*

Once you click on that screen, below you see the search screen. Notice that there are 1,166 people in the database. You will see names of organizations that may have contributed to WUU, etc.   The more specific you can be in your search the better the search results will be.

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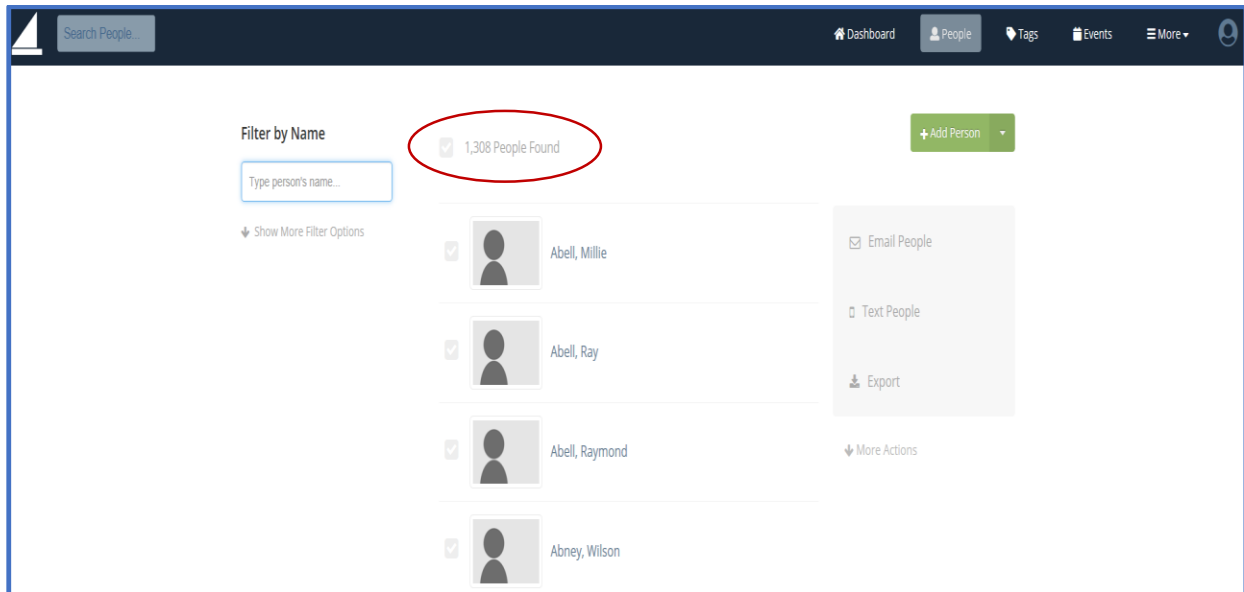
Figure 8- Search People Screen

Below is a sample of searching for Charles.
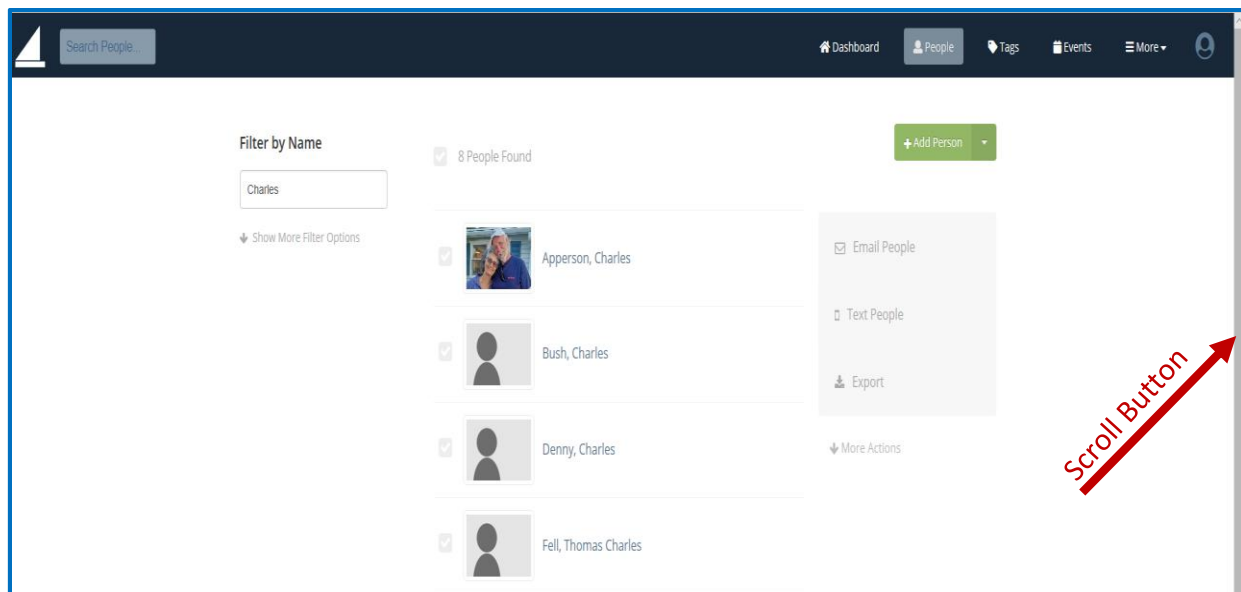
Figure 9-Search for Charles

Notice that the search feature has a scroll button on the side. There may be names you do not recognize. Do not worry about it at this time. We are hoping that all members will review their profiles and update them.

Now, I will do some demonstrative searches. Another interesting thing will be nicknames. If you set up your profile with a nickname, that nickname will appear in searches.

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Viewing your profile in Breeze

Follow the steps above to access/view your profile. As a matter of fact, we are recommending that every member review their profile to ensure that the information is accurate in our database. Check your address, email and phone numbers.

Figure 10- Profile Screen

Using Tags in Breeze (Groups)

Back at the Dashboard and along the top tool bar, you see an icon for Tags
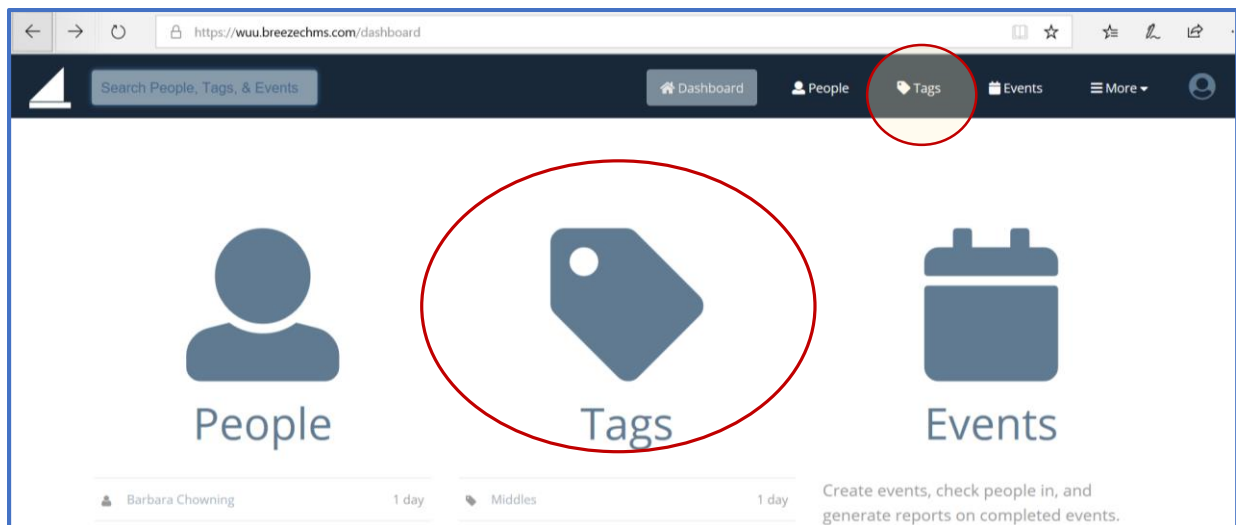
Figure 11- Tags on Dashboard Screen

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Tags is Breeze's term for groups. The Database team is currently setting up the TAGs in Breeze. Be aware that the view on a PC is different than on a smart tablet. Review the two screens below to see the difference.
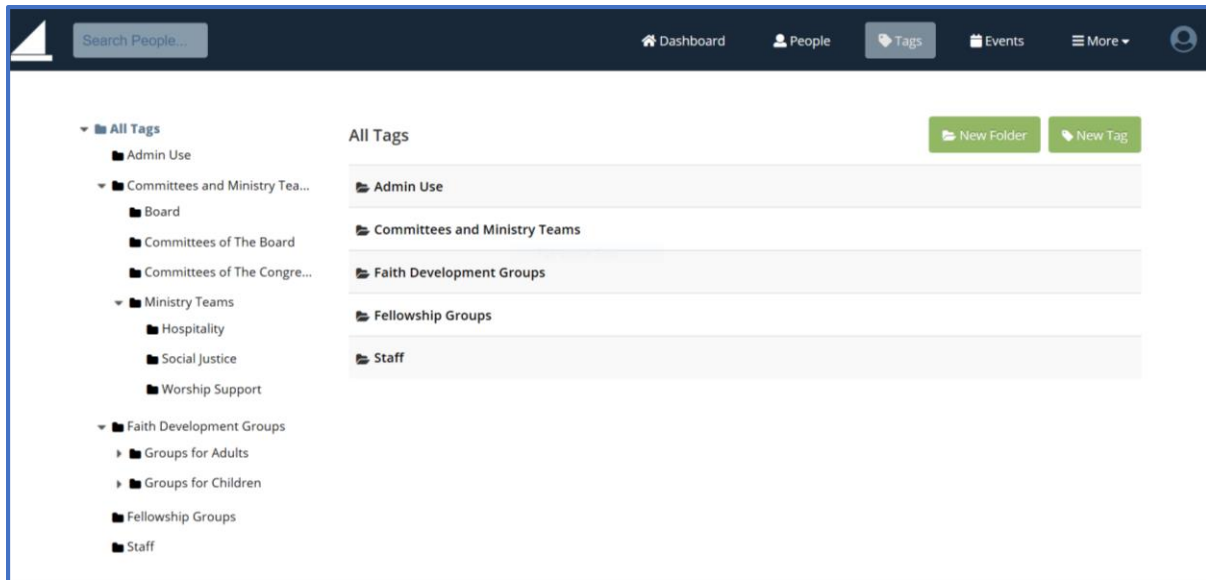
Figure 12-WUU Tags (PC)
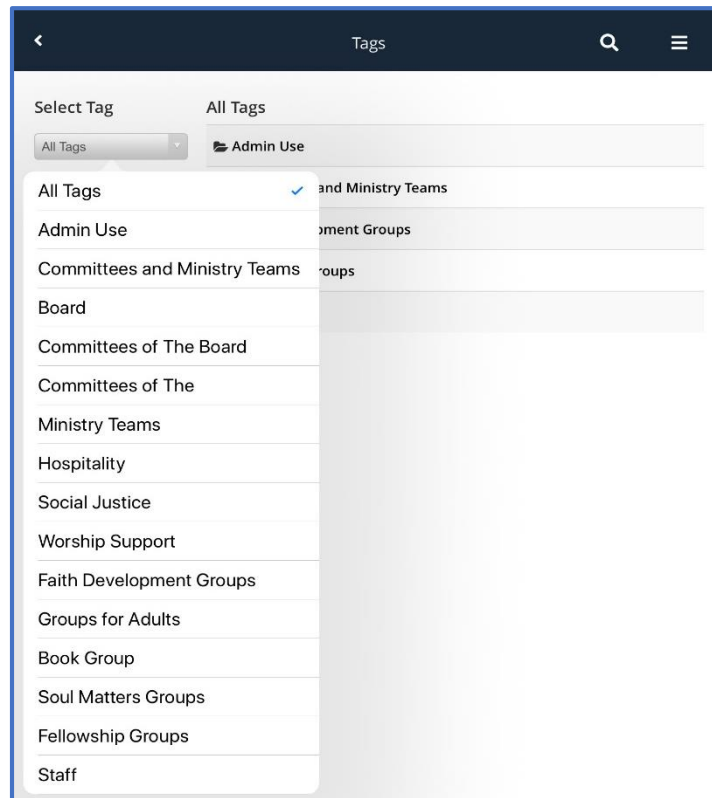
Figure 13-View of TAG screen on iPad

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Below is a screen shot (PC view) of the Tag for the Hospitality Team divided up into the 7 groups.
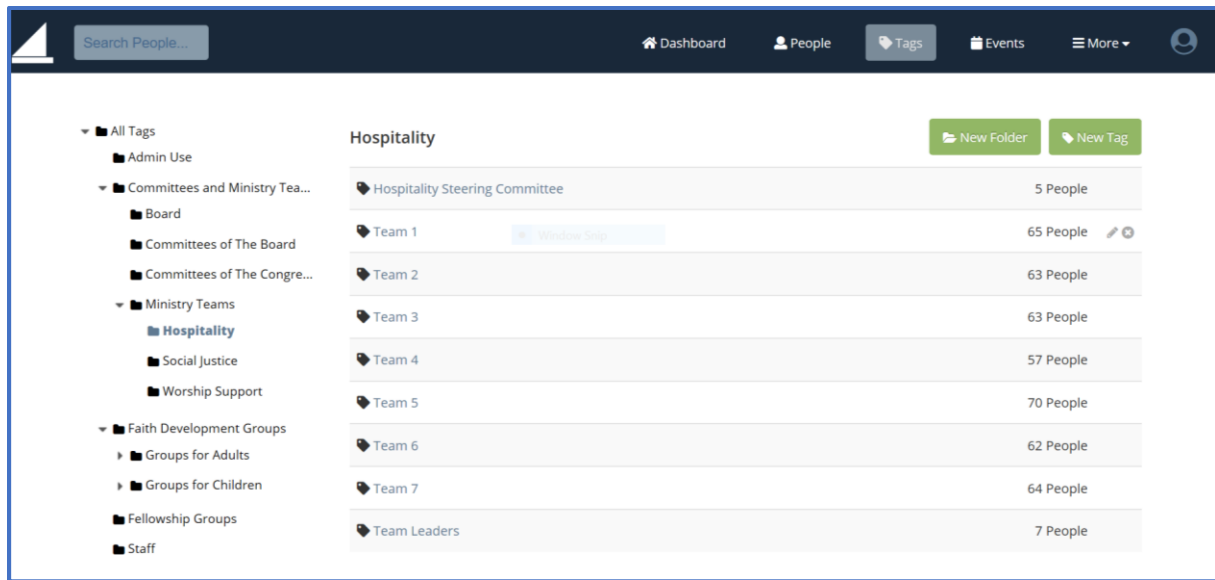
Figure 14-Tag for Hospitality Team

Adding a team member to a Tag

Call the office to add team members to tags.

Adding people to the database

Due to roles and permissions in the database, the WUU Office staff will add new people to the database as needed. Please contact the office to add new people.

Scheduling an event

One of the features of Breeze is being able to add Events to the Calendar. Below is a look at the event calendar for August for the Main Sanctuary.
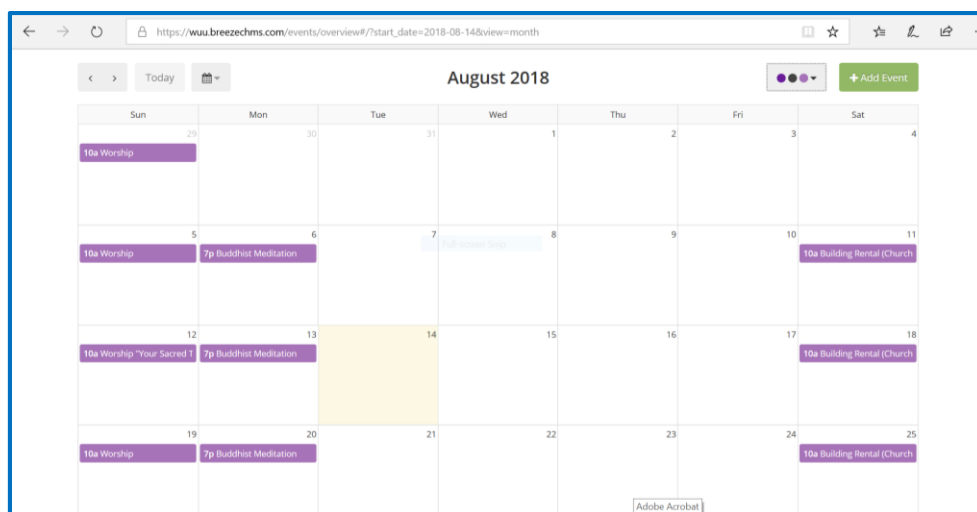
Figure 15-Events Calendar for Main Sanctuary

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As always, the WUU Office staff will control the calendar to ensure no double booking occurs. Send your requests to the office but be sure to include an end time for the event, i.e. 7:00 p.m. until 8:30 p.m.

You can use the calendar to check room availability.

The calendar is also embedded in our WUU website.

Scheduling a team meeting at home

If you are scheduling a meeting at your home, you may call the office to add it to the calendar

How to fix something in Breeze -

If you determine that

- Information for another member is not accurate
- List of team members in a TAG is incorrect
- Any other information that is incorrect

you may call the office. You, as a user, will only have permissions to update your own information.

Charitable Giving

Charitable Giving is seen only by the member and is accumulated only since July 1st of this year. The records are kept by the office. Go to your profile and click on the giving screen to see your contributions since July 1, 2018.
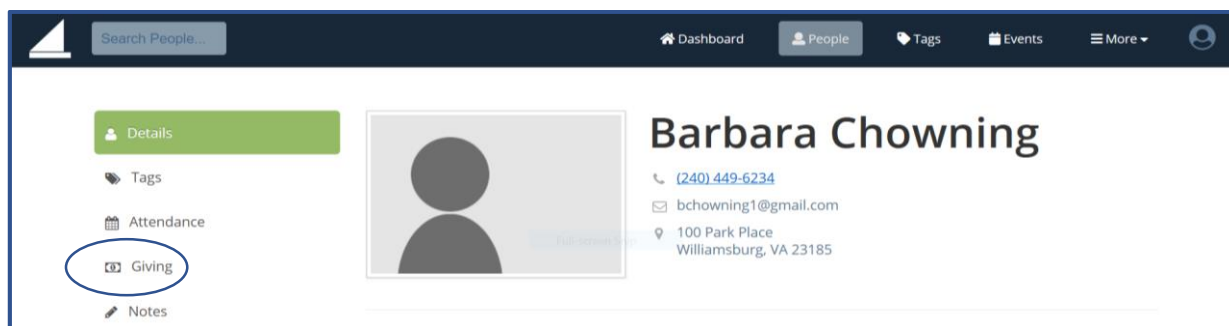
Figure 16-Giving Screen showing personal giving

If you search a member, you will not see his/her giving information as shown below:
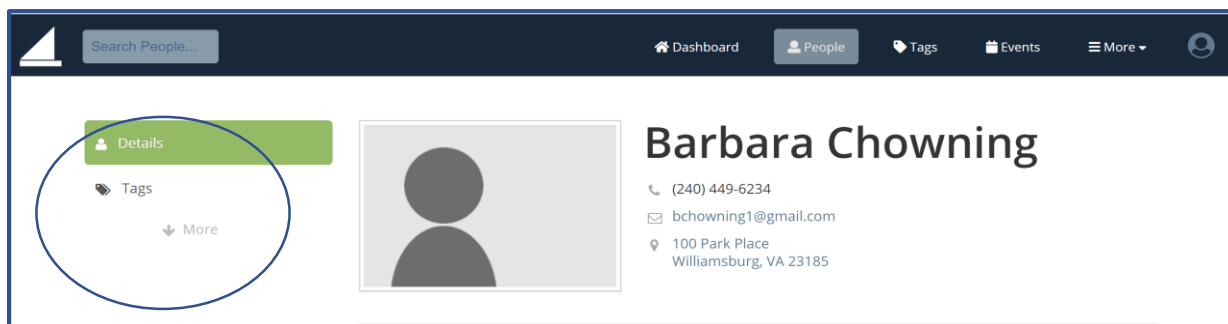
Figure 17-Giving screen not shown

Appendix I - Breeze Definitions

	DEFINITION
Dashboard	The first page of the Breeze website after logging into Breeze.
Events	A planned WUU occasion, i.e. hospitality schedule, worship ministry schedule, social justice meeting, etc.
Friend	A person who attends and perhaps assists with member tasks but has not officially joined as a member
Member	A person who transferred from another UU or one who has taken the membership classes and has signed the WUU member book.
People	all the people who make up the Breeze database.
Tag	Tag is the name given by Breeze for groups. Quickly organize groups of people and easily communicate with those groups by setting up Tags. Organize your Tags even more by putting similar Tags into folders or sub-folders.

Appendix II - Minimum System Requirements for Breeze

Overview: We sometimes get the question: "What do I need to run Breeze?" The simple answer is, "An internet connection and a modern browser." However, for those of you who are more technically inclined, or just curious, you might want more additional or specific details. This article aims to provide more detailed information when this question arises.

How fast does my Internet connection need to be to run Breeze?

Generally speaking, we recommend at least 10 Mbps download / 5 Mbps upload to use Breeze at an acceptable level of service. You *can* use Breeze with lower speeds, however, you will likely experience frustration in terms of speed and perceived responsiveness, especially when printing name tags.

There are other factors in play that can impact Breeze performance (network congestion, older/slower computer processors, etc...). But in terms of raw internet speed, 10 Mbps Down & 5 Mbps Up is recommended.

You can test your Internet speed here: http://www.speedtest.net The results (as of this article), look like this:
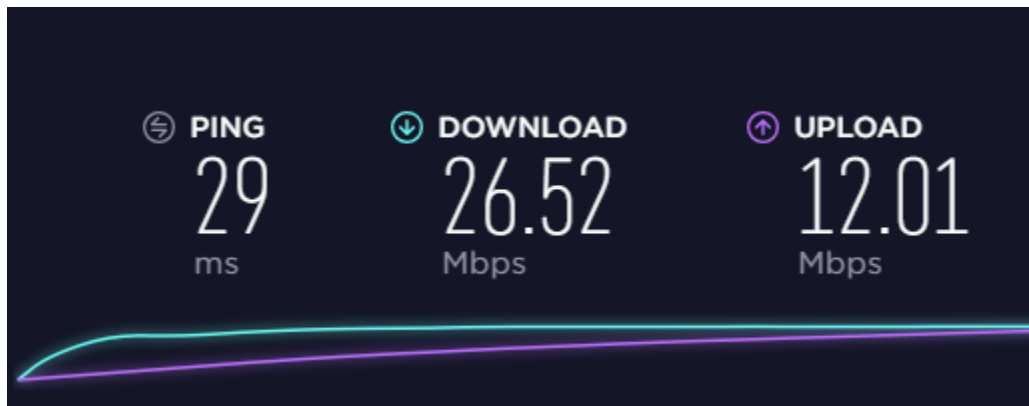
What Internet browser does Breeze recommend?

A modern Internet browser. This means Chrome, Safari, Microsoft Edge, Firefox, and Internet Explorer (version 11 please). We prefer Chrome, but Breeze will work with any of these browsers.

What kind of computer does Breeze recommend?

You can use Mac or PC (the Breeze staff has Mac and PC users). If you're an Apple Mac fan, pretty much any Mac computer manufactured in the past eight years will work. Newer is better - but even printing name tags on an older Mac will work without too much waiting or frustration.

Appendix II – Minimum System Requirements

Windows machines are a bit trickier, only because there are SO many additional options (processor, video card, storage, etc...). Since we are looking at the general minimum recommendations, this is a good place to start:

Intel Processors: At least a 3rd Generation i3/i5/i7 processor. With Intel, you can identify the generation by the processor number. Ex. - i3-3220 where the '3' in the 3220 defines a 3rd Generation processor.

We don't generally recommend Celeron processors. For normal web-browsing Celeron processors are adequate. However, when it comes to printing name tags, the extra processing power makes a difference.

AMD Processors: 4th Generation A-Series or better

RAM: At least 4GB

Hard Drive: Breeze is cloud-based - not typically an issue

Bottom line: The best advice might simply be, "You typically get what you pay for." If you go out and grab a new laptop off the shelf for $300, the manufacturer has typically cut some corners to bring the price point down. This usually means a slower processor, lower screen resolution, slower hard drive, or simply lower build quality. We don't want to tell you how much you *should* spend, but if you're buying a new Windows laptop and you're on a budget, you should look for the following specs: seventh- or eighth-generation Intel Core i3 or i5 processor (they'll have model names that start with i3 or i5 and end with 7*xxx* or 8*xxx*), 8 GB of RAM, a solid-state drive, and a 1366×768 or better screen resolution. If you're an AMD supporter, you're looking for a 7th Generation AMD A-Series APU.

What mobile devices work with Breeze?

We support both Apple and Android - apps for both are in the App Store and Google Play. With Apple, it's fairly easy to recommend, pretty much any mobile device (iPhone or iPad) manufactured in the past four years won't have a problem running Breeze.

With Android, it gets a bit more complicated, only because there are more Android devices from various manufacturers. With this in mind, our general advice is that if you paid more than $300 for your Android device in the past four years, you'll probably have a good experience using Breeze on that device. You'll notice that this doesn't include the Amazon Fire tablets, and here is our reasoning: The Amazon Fire tablets generally don't have enough processing power to use Breeze. We realize that there are always upgrades, and you might have a good experience with an Android device for around $300. However, the same computer purchase logic applies to our mobile device recommendations in that you generally get what you pay for.

Appendix III – What Breeze Can Do

- Automatic way to text and email groups
    - Yes - for volunteer reminders. We'll probably use google groups for group emails
- Include class materials in reminders
    - This can be done with a link to google drive in the reminder notification email
- Access child's information including parent email, phone (with what type), address, child email & phone, birthdate, family (configurations), school, grade, Group affiliation (BSA)
    - We can do all this except we don't have a profile field for group affiiation
- Permit teachers to record attendance online easily
    - Yes
- Produce an attendance report for classes
    - Yes
- Navigators, GS), class enrollment
    - Yes
- Access child's history of past classes
    - Yes - Going forward using event attendance
- Produce automatic reminders for teachers
    - Yes - Using roles within events
- Online signup for teachers to use
    - Yes - Roles for events
- Some way to easily record attendance of a visitor
    - Yes
- Flexibility to move a child between groups or be part of multiple groups
    - Yes
- Pre-built App that is easy to use and has the key features we need
    - Yes
- Keep track of UU circle folks
    - Yes - Using Tag Group
- Ability to track attendance at events
    - Yes
- Ability to collect fees for events or groups
    - Yes
- Ability to store profile photos
    - Yes - users can upload
- Ability to easily register online
    - Yes
- Ability to securely login and update information
    - Yes
- Ability to signup for groups online
    - Yes - If permission is given. Signup can be from tab groups

Appendix III – What Breeze Can Do

- Ability for staff to create groups (possible separate categories for classes, ministry teams)
  - Yes
- Ability to set reminders for pastoral care
  - Yes - Using follow ups
- Ability to track visitors
  - Yes - Using follow ups
- Track pathway to membership steps
  - Yes - Using profile fields
- List record of member activity current & historical
  - Yes - going forward from event attendance
- Instant email list to groups
  - Yes
- Ability to extract mailing data for a select group
  - Yes
- Need a field tracking relationship to WUU (visitor, friend, member, etc)
  - Yes - Profile field
- Provide robust alerts on folks that need to be followed-up on
  - Yes - Follow-ups
- Needs to have customizable fields.
  - Yes - custom profile fields
- Lookup history of past events
  - Basic information on attendance and roles
- Ability for visitors to enter info on kiosk
  - Yes
- Ability to update information in directory and opt out
  - Yes
- Ability to store birthday and anniversary
  - Yes
- Have texttogive-like service with no extra charge
  - Yes

Appendix IV – What Breeze Cannot Do

- Can a child be associated with more than one household?
  - No
- Ability to manage photos
  - No - Use flickr or Google Photos
- Fabulous file sharing
  - No - Use Google Drive
- Ability to merge duplicates in the data migration process
  - No. This was done by hand
- Need contributions by household and by individual to determine who is a member
  - We'll do this outside Breeze