Using the Breeze Church Database

Welcome to the new Saint Matthew's database, hosted by Breeze Church Management Systems (www.breezechms.com). This database is intended to be the reservoir of all church membership information, including the financial contributions made by the friends and members of Saint Matthew's.

Everyone should appreciate this new database, as it will serve multiple purposes depending on your roles at Saint Matthew's:

- ✓ **If you participate in the life of St Matthew's**, the accuracy of your profile, including your picture, is very important to everyone:
    - o It's helpful to match a face with a name so we can all get to know each other.
    - o It facilitates our ability to connect with each other by phone, email or snail mail, which helps us grow in our relationships.
    - o When any aspect of your profile information changes (e.g., phone number, address, new family member, etc.), you have the ability to update the database at your convenience.
    - o **You can choose to bar access to certain information (e.g., do not text, do not email, make private), and you have the option to omit pictures.**

    See pages 3 & 4.

- ✓ **If you give financially to St Matthew's**, the database displays your contributions to date, enabling you to monitor church records and take action if the information is not accurate. Obviously, only you can see your financial contributions. *See page 5.*

    If you need to contact your Shepherd to ask for support – prayer, pastor visit, or other congregational care service -- you can find out who your shepherd is by navigating to My Profile and clicking on "Tags" listed on the left-hand side of the screen. *See page 4.*

    If you participate in a St Matthew's group, the database provides a list of the members of your group, enabling you to email them from the database. And the database saves a copy of the email you send so you can access it later if need be. *See pages 4, 9, & 10.*

- ✓ **If you would like to print your own copy** of the church directory, with or without pictures, you can do that too! *See page 8.*

- ✓ **If you lead a team/group at St Matthew's**, the "Tags" section will allow you to email everyone in your group quite easily. *See page 9.*

The ultimate goal will be for this database to replace the current online Pictorial directory, as well as the church's Microsoft Access database, and the church's Membership Plus database.

The database can be accessed online, 24 hours per day, with internet connected computers, tablets and smart phones. There are Apps for Apple and Android based devices. To find out more, go to: https://www.breezechms.com/app.
> *Note: The church id for the app is 'saintmatthews'.*

This "how-to" guide is intended to help everyone use Breeze successfully. If, after following these directions you are still having difficulty, please go to go to https://support.breezechms.com/hc/en-us, where you will find documentation and helpful videos. If you still have questions, please send them to webmaster@saint-matthews.org and we will respond to them as quickly as we can.

To Log On:

To begin, direct your web browser to: https://saintmatthews.breezechms.com. Bookmark this in your browser to make it easier to return to.
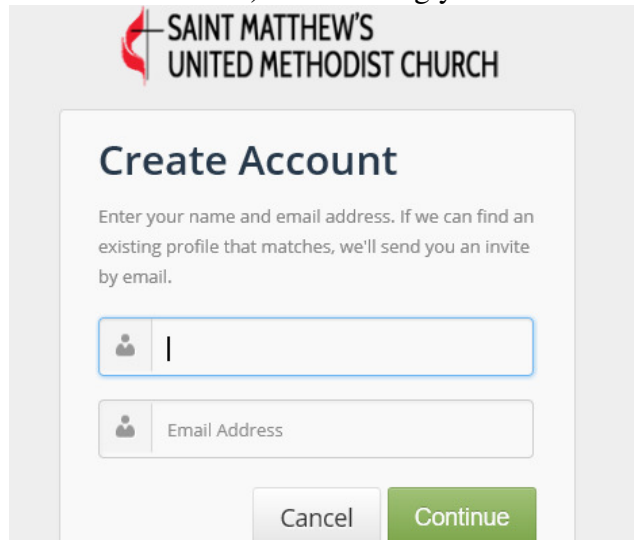
Note: There is no ' - ' between "saint" and "matthews".

You should see a screen that looks like this:

Clicking "Create Account" (outlined above in red) should bring you to this screen.


Your name (first name space last name) and email address should already be in the database. *Only people who are already in the database can create an account and access the database.* If your information is found, you will be sent an email with instructions. If entering your information doesn't result in finding your records, then perhaps the church has a different email address for you than what was in the prior database, or perhaps try different versions of your name, like Bob instead of Robert. If one person in your family can get into the database, you can then look at the information we have for your other family members.

Note: If you cannot get logged in, contact the church office at office@saint-matthews.org to find out how your name is listed and what email address is in the database.

Note: Please remember to use a secure password, preferably with Capital and lower case letters, numbers, and non-alphanumeric characters.

Note: If you ever forget your password, there is a "Forgot Password" link under the "Sign In" button.

You can always get to the database from our website's homepage, in the Quick Links section:
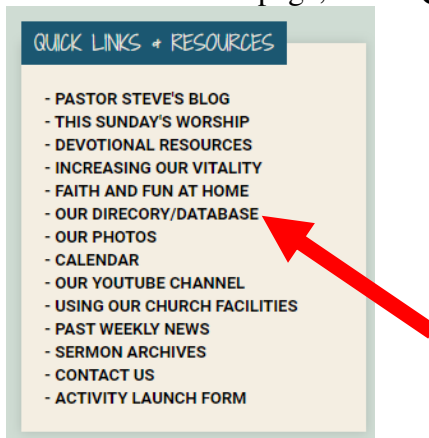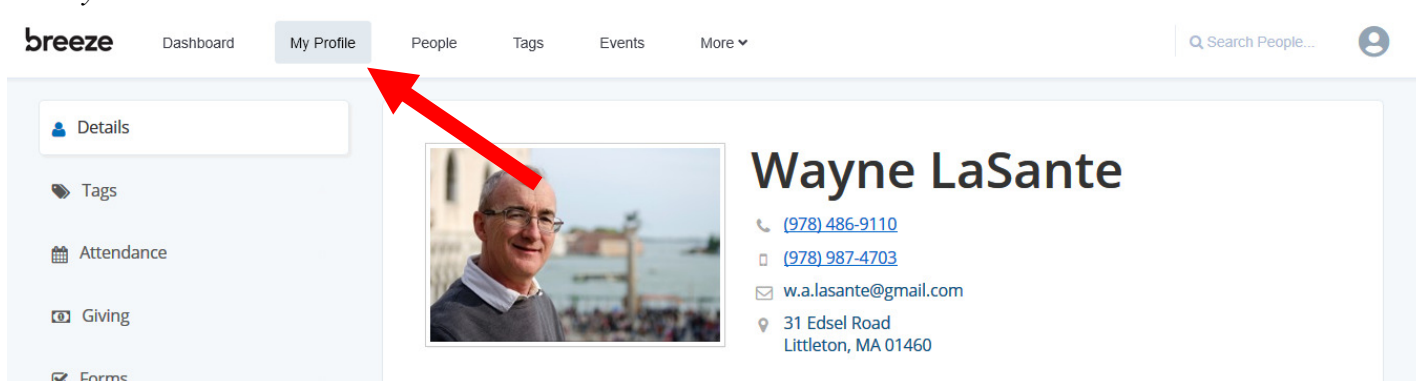

Once you have logged in using the emailed instructions, you should see a screen that looks like this:
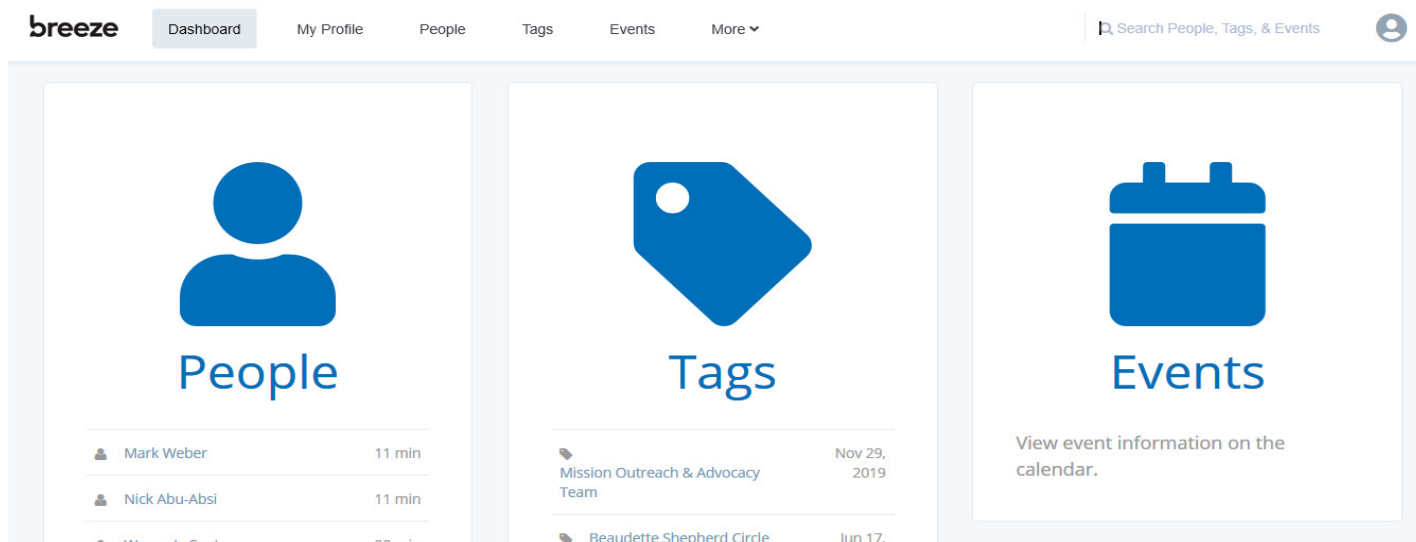
To Review/Update Your Profile:

The first thing you should do is click on the "My Profile" text near the top of the screen. *If your screen is too narrow, instead of words you may have just icons, or you may just have a triple equals sign* ☰ *to click on and make your selections.*

To Review your Detailed Information:

In the "Details" section, you will see your profile's pre-filled information. Please take a few minutes to verify & update it by placing your cursor over the section headings like "Main", "Contact", "Family", and "Other Information", and the words "click to edit section" will appear. Click on those words, revise the content as necessary, then click on "save" that appears over the section heading.

You will notice that some areas have a "Show More Options" feature that opens up more fields.
   Note: You can make some of your information private in these options.

   Note: For any date fields, you can enter a date like 3/15/0000 to exclude the year, or, if you only know the year, please enter 1/1/YEAR.

We ask that you please upload a photo of your family as well as a photo of each individual on their respective profiles as you wish. If no family members are listed, this option is hidden until you add at least your own name here (hover your cursor over the "Family" section bar and click on it, then choose "+Add Family Member). After the picture is uploaded, you will see an outline comprised of small white boxes in the upper left-hand corner of the picture display border. Click and drag the bottom right-hand white box to maximize the picture size and then move/position the resulting picture to optimize what is seen. Click on save.

Please fill in "Family Label" field with how you would like a letter addressed to you, like "Mr. & Mrs. Smith", or "Susan and Wayne".

While in the "Family" section, you can click on any of your family members' names to immediately be taken to their profile information. Please make sure theirs is correct as well.

To Verify Which Groups You Are In:

"Tags" are Breeze's terms for the groups that you are a member of, for example your Shepherd Circle. While still under the "My Profile" tab, "Tags" will show you which groups the church thinks you are associated with. If you find any are incorrect or missing, please send an email to office@saint-matthews.org.

To Review Your Record of Your Presence Among Us:
Saint Matthew's is not using the "Attendance" portion of the database.

To Review Your Record of Financial Giving:
In the "Giving" section, you can see amounts the church has recorded for your contributions this year. You can also see how you are doing against your pledge, if you made one.

> *Note: Other members cannot see your contributions. Only the Senior Pastor, the church's Financial Secretary, and the chairperson of the Stewardship Committee can see the contributions.*
> *Note: There is no bank account information stored in the database, only entries of contribution amounts.*

Note: If you see any discrepancies, please contact the church's Financial Secretary at
*finance-secretary@saint-matthews.org.*

To Connect With Others:
Looking up people in the directory is quite simple. You can either click in the search box and enter part of a first or last name, or you can click on the "People" icon or the "People" text in the menu bar and then click in the "Filter by Name" box.
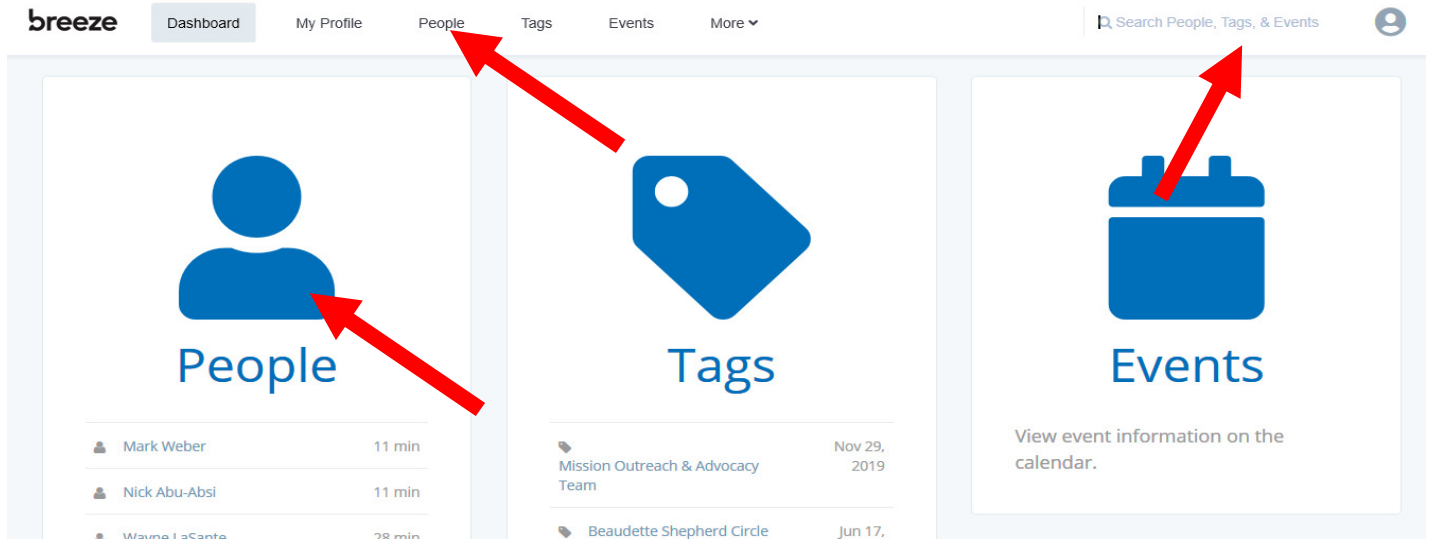
When you start typing in a name, the program will begin to narrow down the people it can find with that criterion. For example, the next image shows what is found if you type "Sus". Remember some people may go under another name, like Sue or Susan, or Bob, Rob, Bobby, Robby, or Robert.
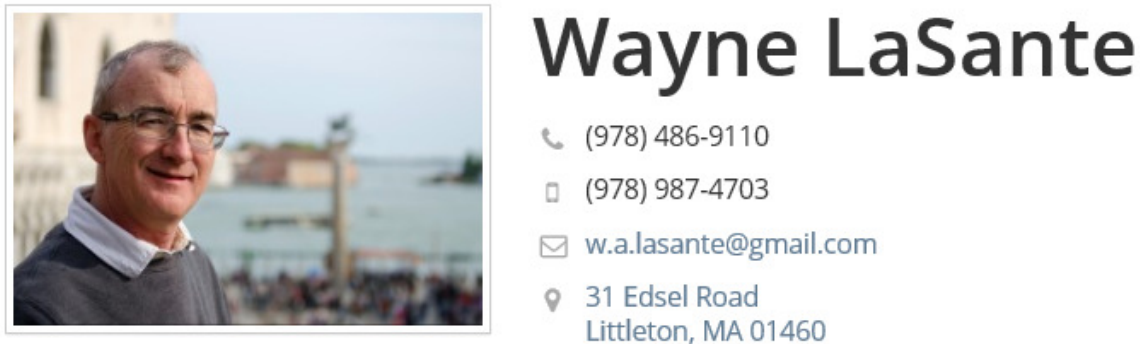
You can enter a first or last name, or both.
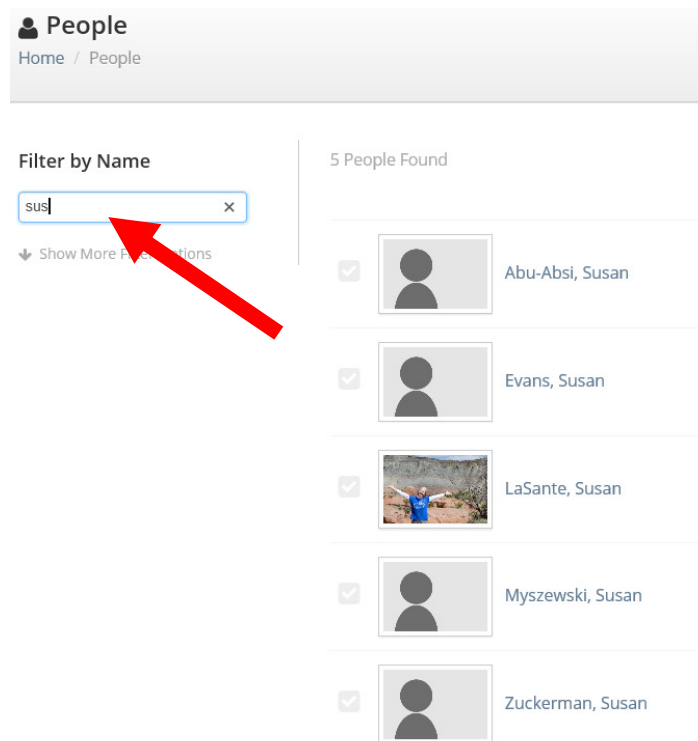
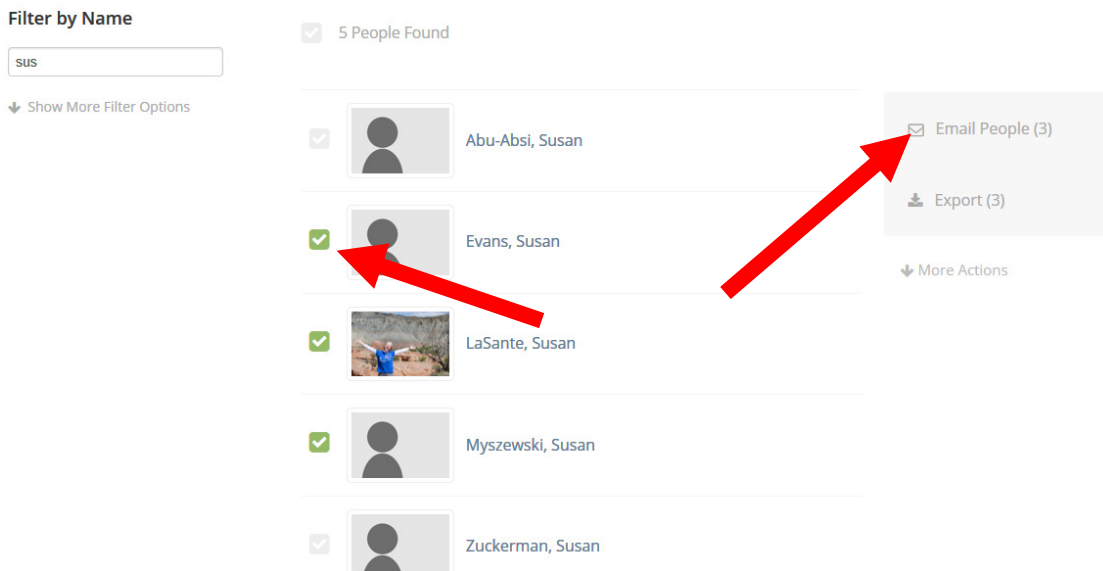Hovering the mouse cursor over an image can provide some basic information:

while clicking on the image or name will bring up their information.

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You can see a map of the address listed by clicking on the address, or you can send an email right from within the database by clicking directly on the email address.

To Email People:
By selecting the checkboxes alongside people's photos, you can send a group email by clicking on the "Email People" to the right of the names. Please note that the default is for the email to be sent out as a "Blind Carbon Copy" (Bcc) to the recipients. You can change that to be "TO" instead of "Bcc", (click in Bcc section) but you won't have the record of who has opened the email in the "History" section that you will have with "Bcc" (see page 11).


> *Note of Caution: If you click on the "Email People" link to the right of the names without checking any names, your email will go to everyone in the entire database. **Please do not do this because it will send an email to about 200 people.***

You can add more people to the BCC field of your email by starting to type in their name, just like you did if you were searching for someone. See page 10 for more information about emailing people.

> *Note: At this time you can only email people who are within the database.*

To Create Your Own Printable Directory:
If you click on "Export" rather than "Email People", you will be able to create a directory of the people you've selected, or, if you didn't select anyone, then of all of the people in the database will be selected.
By clicking on the pencil icon in the lower left hand corner of the popup window, you can choose from some pre-made formats, or you can design your own and save it as a custom template.
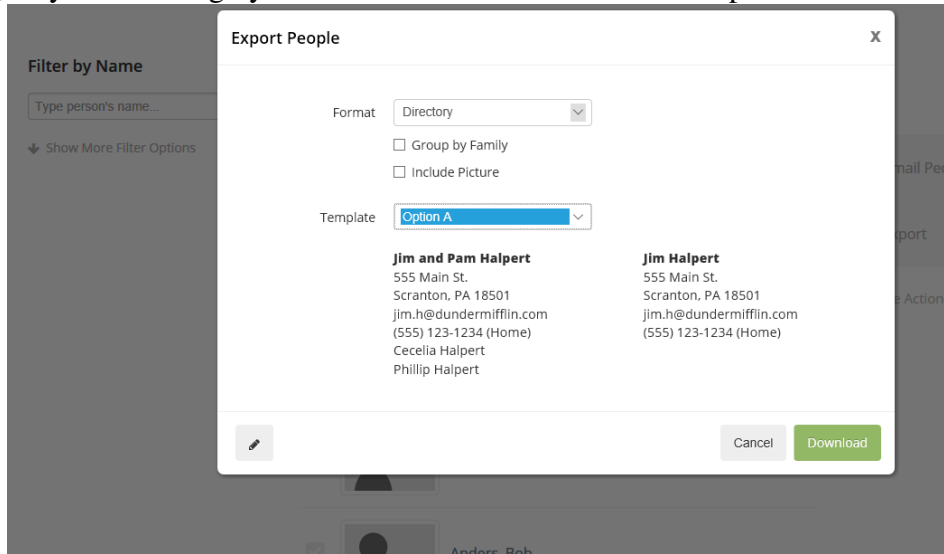

To Create a Custom Map displaying Multiple Addresses:
By choosing the "More Actions" link to the right of the names, you will see a third choice of "Map People".
This will create a map showing the addresses of where the people you have selected live.

To Customize Your Search for People Using Multiple Filters:
If you choose "Show More Filter Options" (located right below the "Filter by Name" box), you will see many options that will help you in selecting the exact names you are looking for. For example, if you chose 'Contact' 'Address' 'Littleton', the result would be a list of only the people who live in Littleton. There are many, many filter options available.
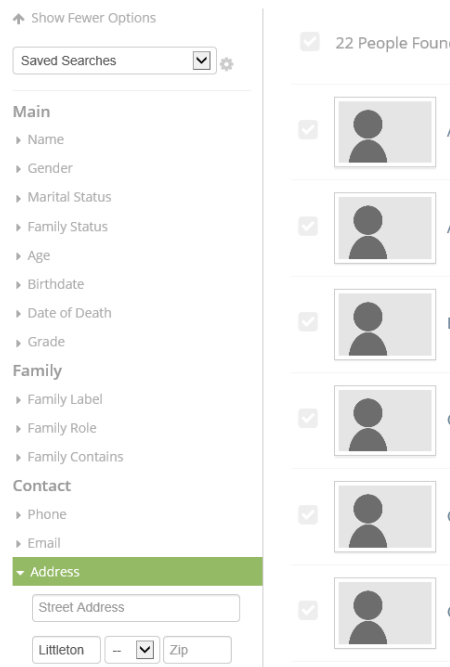
**To Learn Who is Listed in a Team/Group:**
If you click on the "Tags" icon or "Tags" text on the menu bar, you will be able to see the members of the various 'groups' we've created. If you find something wrong, please notify the church office at *office@saint-matthews.org*.

> *Note: The tag Worship Assistants includes worship leaders, acolytes, greeters, prayer acolytes and ushers.*
> *Note: this function is different from "Tags" under "My Profile".*
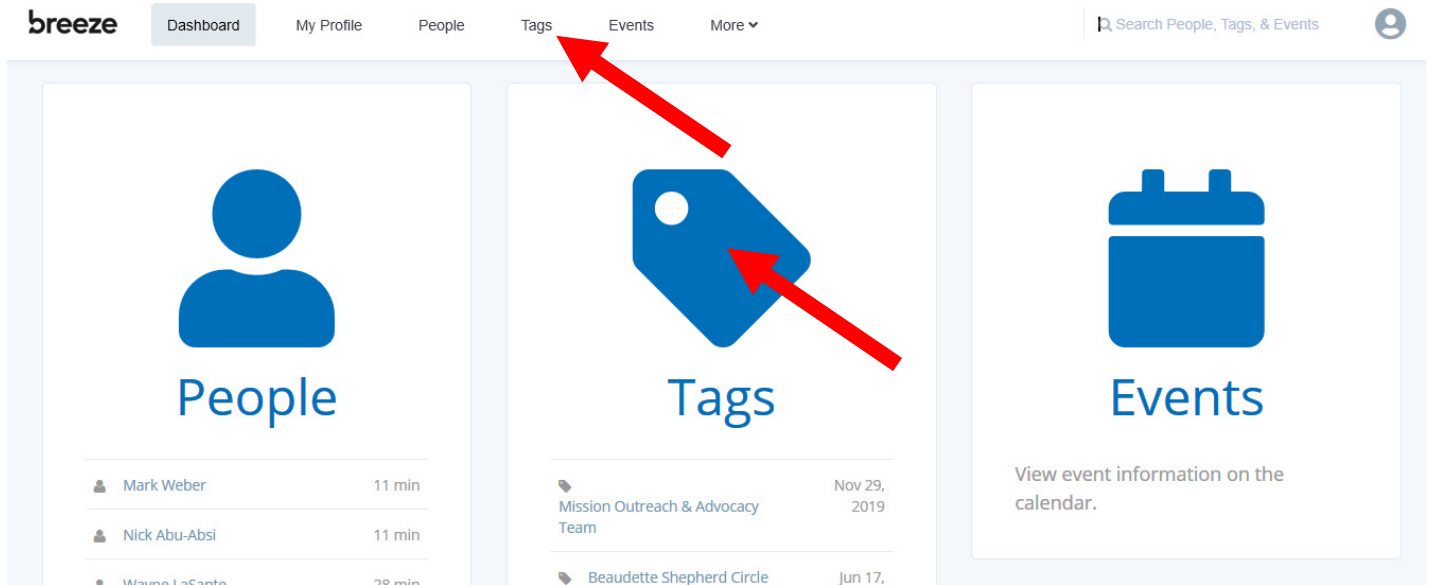
Simply click on the folder, then the tag that you wish to look at:
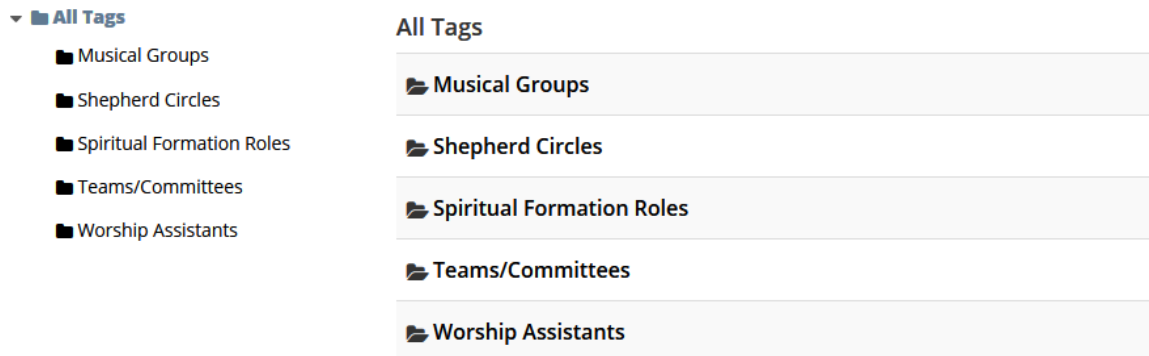
To Check the Church Calendar:
Click on "Events" in the menu bar to see what is happening at Saint Matthew's. This is an exact copy of the church calendar that is shown on our church website. Unfortunately, it does not show the meeting rooms at this time, whereas the one on our website does.

To Access Email You've Sent, Details on its Delivery and When Opened, as well as the history of your use of Breeze, under "More" in the menu bar, choose "History". 'People' & 'Tags' will show the profiles and tags you have looked at recently, along with when you last looked at them. Currently, the church has not implemented 'Text.'

People:

Email:

By choosing "Email", you will see the emails you have sent through the database. You can search for someone you have sent an email to by clicking on the 'Person' drop down box.

If you click anywhere on the line of a particular email, you will see the actual email message that you sent out. "Failed" lists addresses that couldn't be reached.

If you click on the "Delivered" option, you can see which emails were delivered, and when and if they have been opened.

Help:
Clicking on "help" will open your web browser at Breeze's Help page. I've found this page to be less helpful than the information found at https://support.breezechms.com/hc/en-us. They are also very responsive by phone at 888-320-6030.

To Log Out:
On the menu bar at the far right side of the screen is an icon of a person. Click on that and select logout.

To Change Your Password:
On the menu bar at the far right side of the screen is an icon of a person. Click on that to change your password.

This concludes these instructions on how to use the new Saint Matthew's database.

In Conclusion:
If you have questions about how to use this new database, first go to https://support.breezechms.com/hc/en-us where you will find documentation and helpful videos. If you still have questions, you can send them to webmaster@saint-matthews.org and we will respond to them as quickly as we can.

We hope you will find this database useful as you grow in community at Saint Matthew's. Keeping your information up to date will enable others to do likewise.