Breeze Database Handbook

Login: https://hbctx.breezechms.com
Type in your user name & password
User name is first and last name with no capitals or spaces EX: wendywood

Change your password:
- Click on "Settings" at the very top, right hand side
- Click on "Change Password"
- Fill in blanks and click "Save Changes"

People Page/ My Profile

The people page holds all the biographical data about an individual. It shows at a glance the contact info, membership status, family connections, and other useful information. It also links to a person's attendance, giving, and group connection data.

To add information to a section:
- click on the gray box around the section title
- add information
- click save

More information is available in each section than appears, only fields with data in it will appear, not all the empty fields. To see what options are available for any given section, click the gray box around the section title to open the section
- Note, while you can see all the information on your membership/ visitor status, only the office staff can change that information

Family:
- click on the name of the family member to go to his/ her page. Make changes then save the same way as on your own page

To add a family member:
- Click on gray section title
- Click on "Add family Member"
- Enter his/ her name and click save
  - Designate whether person is adult, child, or head of household
  - Click on the person's name to go to his/ her page and add the details

*** - Beware. If you change the address, it will change that address on everyone connected as family. To avoid this make sure you unclick the "Apply address changes to all family members" box

Contacts
- If you added a family member after you put in the address, go to the original page & open the contact section. Make a change to the address, then undo the change (add a space, then delete the space). Click Save and it will update all the addresses for everyone who is linked as a family member

Giving Tab:
To print your own contribution statements
- set the dates to your preference
- click "download to excel"
- choose "print statement"
- keep the option "selected person"
    - you can decide to "group as family" or not. If you do, then all the contributions made by all your connected family will go onto one statement (great option for married couples). If you don't choose to group by family, then it will only show your contributions alone
- choose "print statements"
- separate window will appear. print

Tags Page

This page shows the various groups and organizations in the church. It shows who is plugged into each activity and how active he/ she is within that organization. The page also allows those with access to both track and contact people by their activity.

To add a person to a tag:
- Click on the name of the folder you want
- Click on the name of the tag you want
- Click on "Add People to Tag"
- Type in a name (don't have to completely type a name before it appears). Choose the person you want
- Repeat for all the names you want to add
- ***** *Click ADD* (It will not actually add the person until you hit add) ***

To email people within a tag:
- Click on the name of the folder you want
- Click on the name of the tag you want
- To the right you will see "email people," click that phrase
    - The first time, you will have to give your own email address to update the system
- Type a subject and message and hit send.

You can also text people within a tag, but we ask that you do NOT use this feature. We only have 250 texts per year for the entire church.

To export people from a tag:
- Click on the name of the folder you want
- Click on the name of the tag you want
- To the right you will see "export," click that word

Export Options:
Now you have a few options
1) Actually export the group into an excel document
2) Create a directory of the group
3) Create mailing labels for the group
4) Create Nametags for the group

Export to excel:

- Click on export
- Choose "excel"
- Choose download (new document will appear in the bottom left hand of screen)
- Open document and use as needed (don't forget to save it)

Create a Directory:

- Click on export
- Choose Directory
- Choose whether to include pictures. Choose whether to group as families or leave as individuals
- Click Download. Print
    - Notice on the left hand corner is a pencil icon. Click on that to change the look and format

Create Mailing Labels:

- Click on export
- Choose Mailing Labels
- In small print under the "Mailing Labels" is the size of labels you will get to change that, click on "change" then choose the labels you want
- Choose whether to group as families or leave as individuals. Choose whether to group by postal code
- Click Download. Print
    - Notice on the left hand corner is a pencil icon. Click on that to change the look and format

Create Nametags:

- Click on export
- Choose Nametags
- Choose the size you want to use. Choose whether to group as families or keep as individuals
- Click Download. Print

Deacon/ Director only Tags Access

To add a tag category:

- Make sure you are on the "All Tags" page
- Click on new folder (top right corner)
- Type in a name and hit "create"

To add a tag:

- Click on a folder
- Click on "New Tag"
- Type in a name and click "Create"
- Click on the name to add people to the tag (see above)

To delete someone from a tag:

- Click on the folder you want
- Click on the tag you want
- Click on the small X to the right of the person's name
- Choose "Remove"

Events Page

This page shows everything that is happening in our church. It not only tracks the various events but also who is signed up for those events and who actually is attending the events. Additionally, this is the page that leads you to reports on the various activities of the church. In essence, this is the page that will best allow us to track how well we are Knowing, Growing, Showing and leading people through the steps of discipleship.

<u>To create an event:</u>

- Click on the day on the calendar where you want your event
- Type in the name of your event, check the date, and decide if it repeats
- Under check in, decide who will appear when you open the event, the entire database or specifically tagged people
    - Specific tags – click on the arrow next to "all tags," click on the arrows next to the folders you want
    - Check the boxes next to the groups you want to include. You can include as many as you want
- Choose "Show more options" right under the check in box
    - decide if you want to have nametags print at your event.
        - Click "customize" next to the name tag to customize their appearance
    - decide if you want to include check out or family check in.
    - *** Make sure to include "*specify add person fields*" ****
        - When you have visitors come to the event, and you add them on the side, this is where you set what appears in that section. If you don't set this, you cannot add visitors.
- Save event

<u>To edit an event:</u>

(Especially helpful if you skipped the "show more options" above and need to go back and specify your add person fields.)

- Click on the event on the calendar
- Click on "Edit Event Settings"
    - (You can also get to the edit page by clicking on "view details," then "settings")
- Make the changes you need to make and click "save changes"

<u>To check people into an event:</u>

- Click on the event on the calendar
- Click Check in
- If the person is tagged to the event, simply click on the arrow to the right of his/ her name
    - If you included check out, click the arrow a second time
    - If you made a mistake, click the arrow a third time to clear the check in completely

To check in a visitor or member not tagged for event:

- Click on the event on the calendar
- Click Check in
- In the top right corner you will see a + sign. Click the plus sign
    - A form will appear with data you can enter (only appears if you created the "specify add person fields")
- Type in first and last name (*minimum required*)
    - If the person is already in the database, he/ she will appear. Click on the name & that person is checked in
    - If the person is not in the database, fill out the rest of the form and click "add and check in"

*** As you can quickly see, the database is only as good or as helpful as the data we give it. In the rush of the moment, we understand that you may not have time to enter all the information requested. If not, we ask that you have the person complete the visitor form so Wendy or your attendance clerk can enter the information later.*

Details and Reports

To view a quick overview of event:

- Click on the event on the calendar
- Click "View Details"
- Scroll down to see the overview of the event
    - To add more overview fields, go to the bottom and click on the "add new" box
    - Pick a statistic field, click ok

View People

- You can see who attended the event two ways:
    1) on the overview page, click "view people"
    2) On the left hand side, click "attenders"
- From this screen, you can email, export, and print lists of attenders. (see *export options* in the *Tags* section for specific directions)
- To filter your list, click on "Filter people" in the top right hand side of the screen.
    - Choose the criteria to filter (you can choose more than one)
    - Click "Apply Filter"
- To disable the filter, go above the left margin options to "You are filtering attendees (remove filter)"
    - Click on "Remove Filter"

To view a specific report of who did or didn't attend event(s):

- Click on the event on the calendar
- Click "View Details"
- Click "reports in the left column
    - This will give you a list of everyone tagged for the event and their last date of attendance
- In the top right corner is a button that looks like . Click that button
    - This will give you a chart with all the dates of a repeated event and whether or not a person attended each one, essentially, give you attendance at a glance
    - You can also adjust the date ranges to show the data you need

Adding Alerts:

- Click on the event on the calendar
- Click "View Details"
- Click on "Alerts." Click on "Add Alerts"
- Choose the email, which people to include, and the "not attended" threshold. Click "Add alert"
    - If this is a repeating event, it will add the alert to all the events in the series

More/ Help Page

While this quick handbook might be helpful, you can learn even more by going to the help page. There you should find any information that wasn't covered here. If that still leaves you with questions, then contact Wendy Wood at the church, and she will do her best to answer any questions you may have. heritagebcmc@verizon.net and 281-403-4994.

To find the Help page:

- Go to more at the top right hand corner of the page
- Click on "More"
- Click on "Help"
- Find the category for your question and follow the steps given