BREEZE – Lockwood's New Church Management Software

Breeze is used by more than five thousand churches to organize people, track giving, manage events, and more.

Breeze is Lockwood's new church management software. We can communicate cancellations, events, volunteer activities, and much more. You'll be able to manage your family, contributions, hobbies and volunteer involvement through something called "tags." Different groups, like Lockwood Ladies, Nursery, Rocker's Potluck, D Groups and so on, will be able to communicate within their own groups and manage events and volunteers. Furthermore, Breeze allows you to quickly look up people and find ways to contact them. Breeze also makes it easy for Lockwood to track giving, generate giving reports, offer online giving, text giving, and send out giving statements with just a few clicks. (Don't worry though, this information continues to stay private.) In summary, Breeze is a helpful tool (not a burden!) to make communication and organization within Lockwood easier, faster, and more efficient.

Disclaimer: Not all functions listed here are available to everyone. For example, only ministry leaders can schedule events and volunteers. You can contact the office to update your role if you need access to a particular function.

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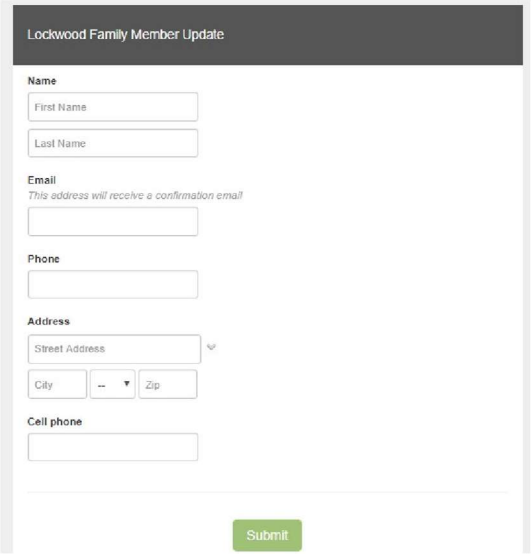
1. Making Sure You Are Signed Up and Have a Log-In

Step 1: - Sign-Up Form

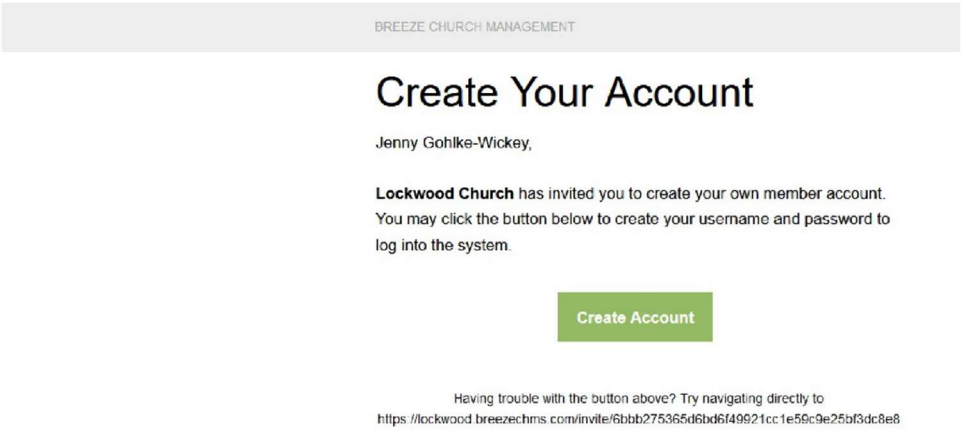
Before you can do anything to your Breeze account, you have to make sure that you are signed up and that you have created a log-in. Here is how you do that:

1. If you have not filled out this form yet, please do so now: https://lockwood.breezechms.com/form/bbc734
2. Simply answer all the questions and hit the "Submit" button.
3. You can now close this window.



Step 2: Finding/Requesting Your Invitation

To access Breeze as a member of Lockwood, you need to have an invitation. This is to make sure that only people who attend Lockwood have access to information such as names, addresses, phone numbers etc. Most likely, you already have received such an invitation via email in the past.



1. If you don't remember receiving this email, check your spam folder and/or search for the email subject “Create Your Lockwood Church Account.” These emails were sent out in late January. We used the email addresses we had on file for you (which means, there is a possibility that it was an old email address you might not use anymore.)
2. If you cannot find this invitation email and don't remember ever seeing it or creating a log-in on Breeze, contact the office (office@lockwoodchurch.org) and request a new invitation email.

Step 3: Creating A User Account/Log-In

By now you hopefully have received/found your invitation email to Breeze. Click the “Create account” button in this email and enter a username and a password you would like to use. Don't forget to write down your username and password somewhere. You will need this information every time you want to login into your Breeze account in the future.

2. How to Reset Your Username/Password

1. Username

If you forgot your username or email address associated with Breeze, give the office a call (517-279-7536) or send them an email: office@lockwoodchurch.org. They will be able to help you.

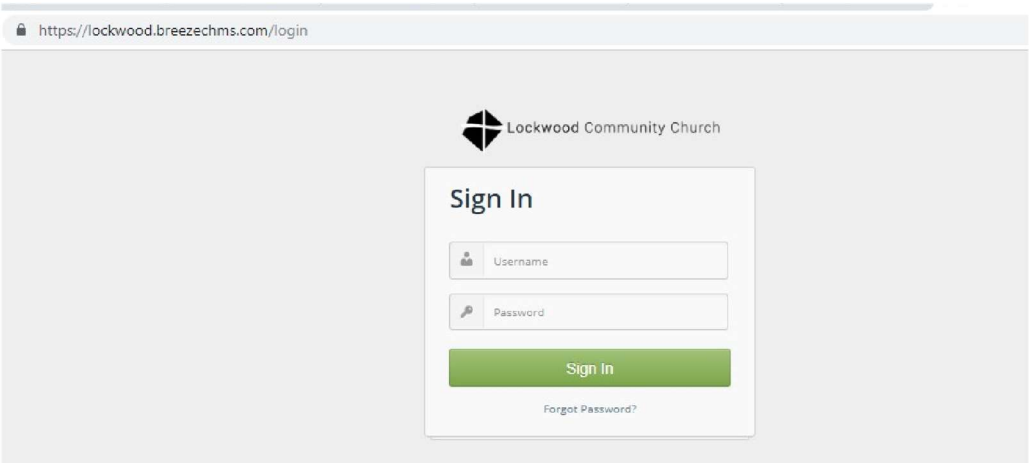
2. Password

If you forgot your password but remember your email address, you can go to Breeze and click on “Forgot Password?” on the login screen. Breeze will then send you an email with instructions to reset your password.

3. Completing Your Profile

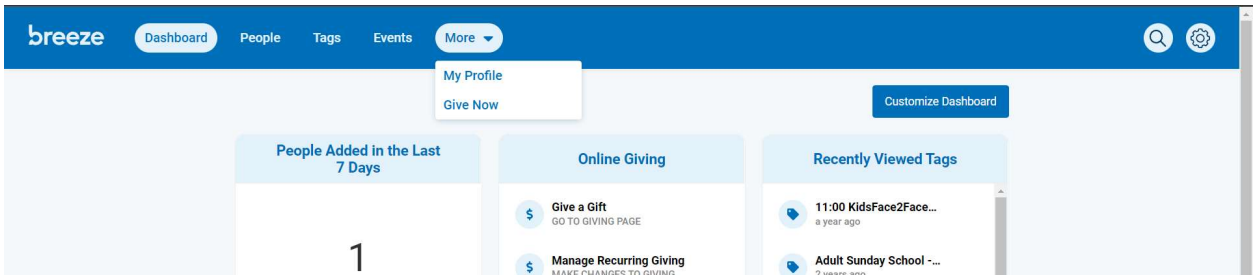
Step 1: Logging In

Every time you want to access Breeze in order to look something or someone up, to change your information, to tag yourself, or to upload or change your profile picture etc., you first have to log in to your Breeze account. You do that by going to https://lockwood.breezechms.com/. The website will then prompt you to enter your username and your password.



Step 2: Accessing Your Profile

After you have logged in to your account, the website should redirect you to your "Dashboard" or immediately to your profile. If you don't automatically land on your profile but on your dashboard, don't worry, simply click on "More" and then "My Profile" at the top of the page.

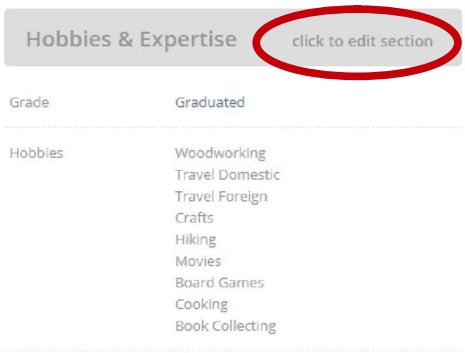


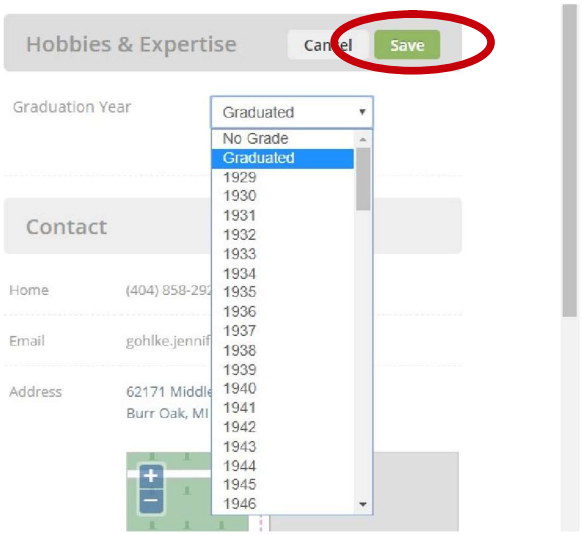
Step 3: Editing Your Profile Information

Very good. You made it to your profile. It should look like this:

First, you want to make sure that your name and your contact information are correct. If you find a mistake or some information incomplete, you can edit the respective section by clicking on “click to edit” on the gray sub-header. At this time, you can start to play around a little bit. Try to find out what information you can edit. Maybe you would like to start with your hobbies. Don't worry, you can't break anything.

Here is how to edit information: As soon as you hover over one of the subheadings (Main, Family, Hobbies & Expertise, Contact), the “click to edit” button will appear. So, click on that and edit your information. Don't forget to hit “save” on top when you are done.



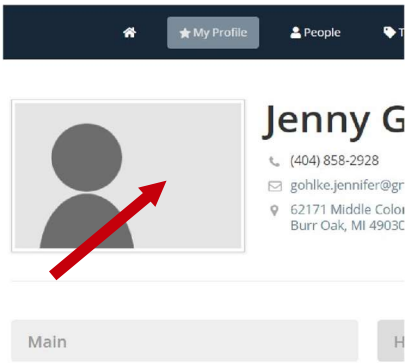


Step 4: Upload A Profile Picture

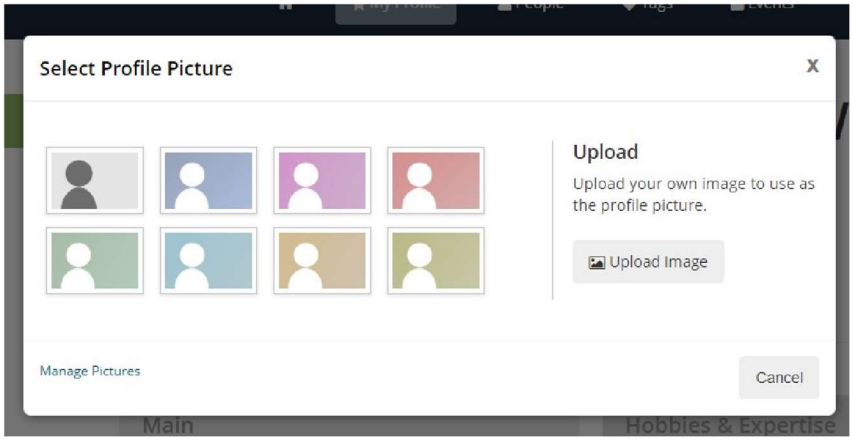
Now, finally, let's upload a profile picture! (This picture will be used for ministries and events that you are part of.)

First, you will need a picture of yourself saved on your computer or phone. If you don't have a picture yet, you can quickly take one with your phone or ask someone else to take a picture of you and to send it to you via email. (This step might be a little bit challenging if you have never really used a computer or smart phone before. Feel free to ask the office (office@lockwoodchurch.org) for help.) For now, let's assume you have a picture of yourself that you would like to use as your profile picture saved on your phone/computer.

Go to your profile and click on the gray picture.

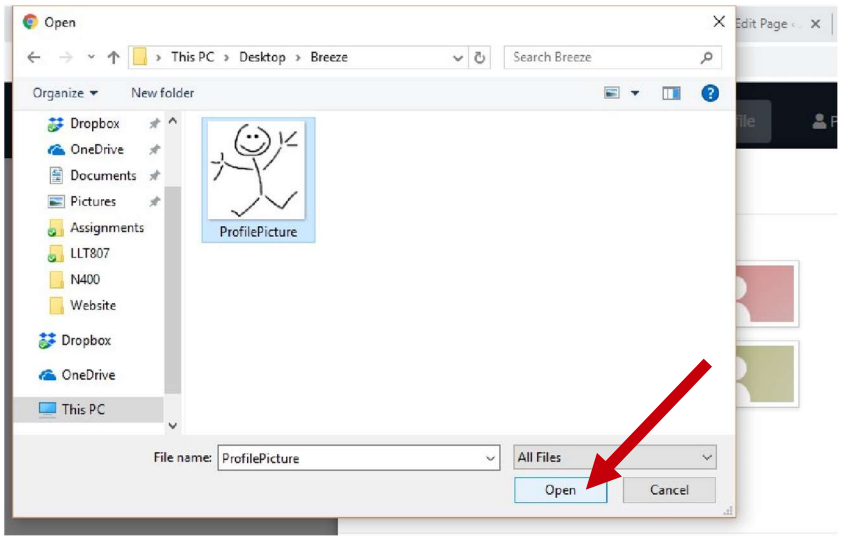


Another window will pop up and ask you to select a profile picture. If you are using a **desktop computer**, it will look like it does in the picture. If you are using a **smart phone**, the entire "Upload"-part to the right, will be beneath the different colored pictures. You will have to scroll down in order to be able to see it.

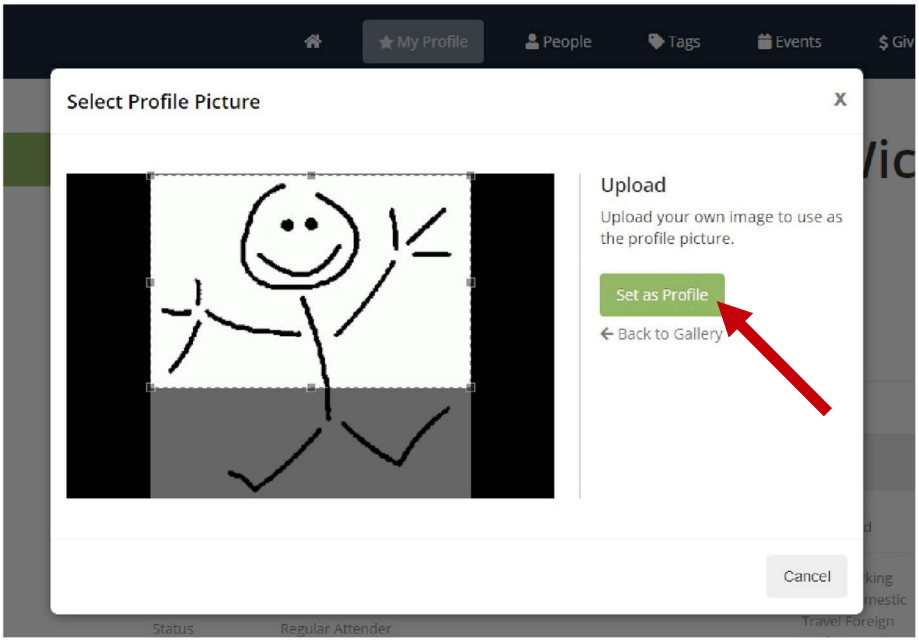


Click on "Upload Image" on the right.

Your computer's or phone's file explorer will open up and you will have to find and select the picture you want to set as your profile picture in your files. Click on "Open."



After selecting the picture, you will be able to crop it and select the part of the picture that you would like to upload. Don't forget to click on "Set as Profile" when you are done.

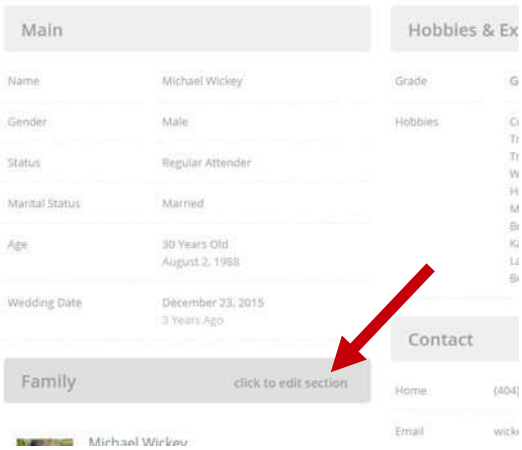


You did it! You now have a profile picture. You can change your picture at any time and as often as you want to.

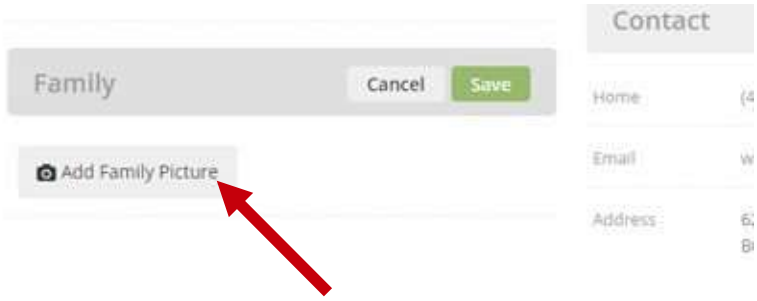
Step 5: Upload A Family Picture

First, go to your profile and scroll down to the sub-heading "Family."

As soon as you hover over the gray "Family" sub-heading, a "click to edit section" button will appear.



Click on the "click to edit section" and a new button called "Add Family Picture" will show up.



Click on the "Add Family Picture."

From this point on, the process is the same as it is for uploading a profile picture. Don't forget to hit the save button when you are done.

4. Assigning Tags to Your Account

Before you learn how to assign tags to your account, you would probably like to know what they are.

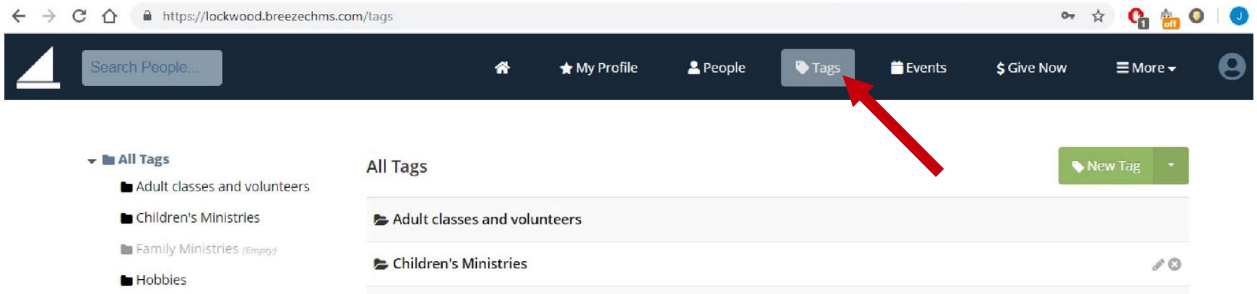
What is a tag?

Imagine you are about to enter a room full of people that you have never met. And imagine, you want these people to know certain things about you by just looking at you. And at the same time, you can learn certain things about all the other people by just looking at them. To make it as easy as possible for everyone, each person has written little sticky notes and put them all over their bodies. In essence, these sticky notes are our Breeze tags.

In the context of Lockwood, it is a way of grouping people together according to their interests, volunteer activities, and group memberships, etc. This is especially helpful when it comes to organizing certain activities. There is, for example, a tag for Coffee Time helpers. If a volunteer is sick or nobody signed up for a specific month of the year, it is possible to send an email to everyone with the "Coffee Time helpers" tag assigned to their account and to ask if someone might be available and willing to help out.

So here is what you need to do in order to assign tags to your account:

Step 1: Click on "Tags" in the Menu



Step 2: Find and Choose Tags You Want to Assign to Your Account

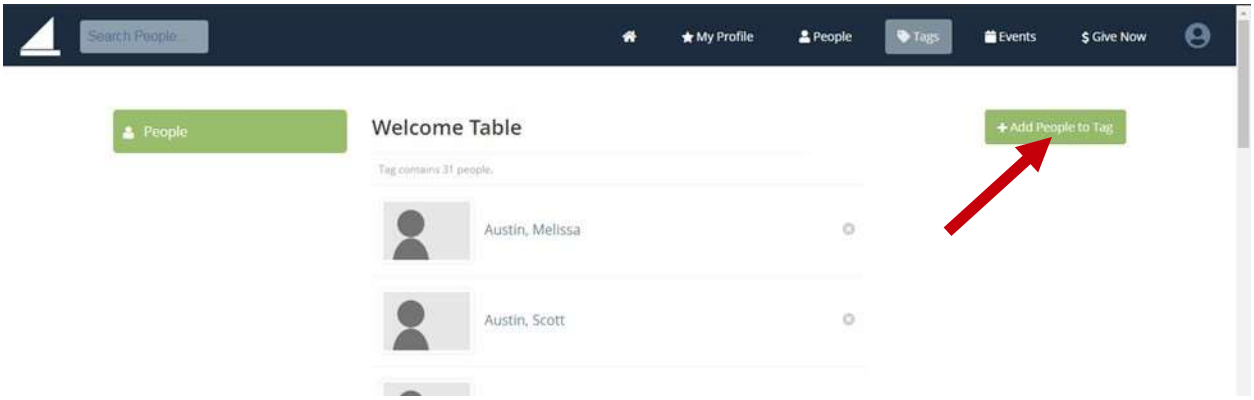
All you have to do now is to browse through the available folders of tags and decide which ones you would like to be associated with.

There are the main folders on your left-hand side. If you click on one of them, you will open up subfolders, which you then can open as well.

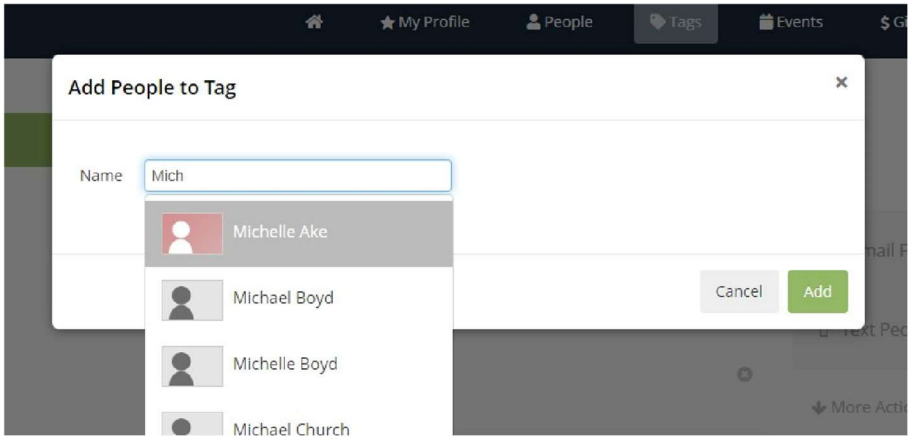
Step 3: Assigning a Tag

Let's say that you are a volunteer for the welcome table. You click on the "Hospitality" folder on the left-hand side. A list of activities will show up in the middle of your screen and you then click on "Welcome Table." Some people are already assigned to this tag, so you will see a list of people.

If you now want to assign the "Welcome Table" tag to your own account, you click on the "Add People to Tag" button on the top right corner.



Another window will pop up and ask you to enter the name of the person you would like to assign to this tag. Please don't assign other people to tags. Only assign yourself. Write your own name into the empty field and click on your name or picture as soon as you see it in the drop-down list.



Don't forget to click on the “Add” button when you have found yourself.

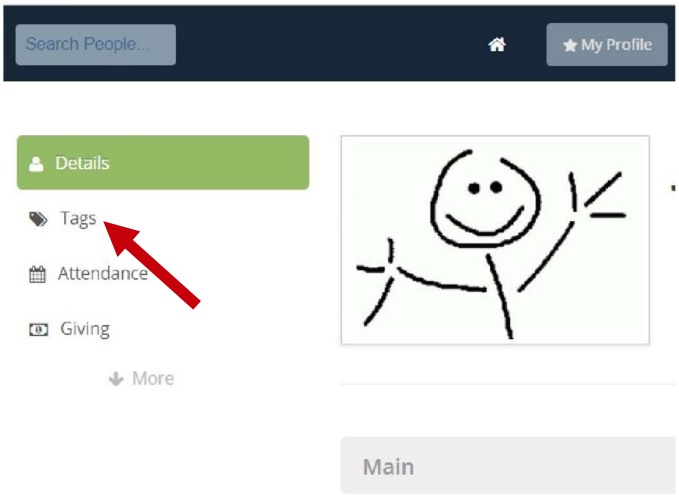
Now repeat this process with all other tags you would like to assign to your account. You can assign as many tags as you would like. However, keep in mind, that you might receive emails and be asked to volunteer if you sign up for volunteer related tags.

5. Un-Assigning Tags from Your Account

Some of you will already have tags assigned to your accounts. These tags are based on a questionnaire you filled out for the last directory. In other words, these tags might not apply to you anymore. Please take a look at the tags already assigned to you and delete them if they are outdated.

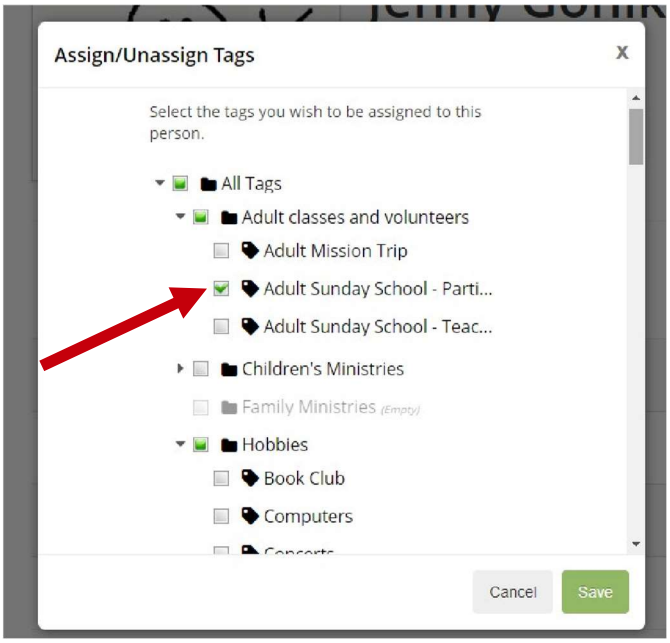
Step 1: Find a List of Your Tags

Go to your profile. On the left-hand side, you will find a navigation bar. Click on the “Tags” button.



Next, click on the “Assign/Unassign Tags” Button on the right.

A new window will pop up and show you a long list of all available tags. Tags that are already assigned to your account will have a green checkmark in front of them.



Step 2: Un-Tag Yourself

If you have found a tag that doesn't apply to you anymore, simply click on the green checkmark and the checkmark should disappear. Do this to all tags that are outdated and click on the "Save" button when you are done.

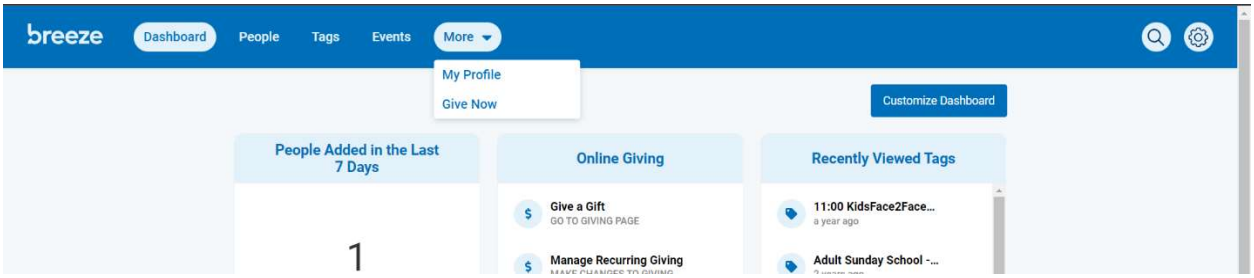
6. Giving Electronically Through Breeze

Breeze allows you to give money to Lockwood Community Church electronically. This means, you can enter and save your debit, credit card or banking information and how often and how much money you would like to transfer. You can even choose exactly what you would like your money to be used for.

This way of giving is safe and continues to be private. Other church members neither have access to your debit or credit card information nor can they see how much you give.

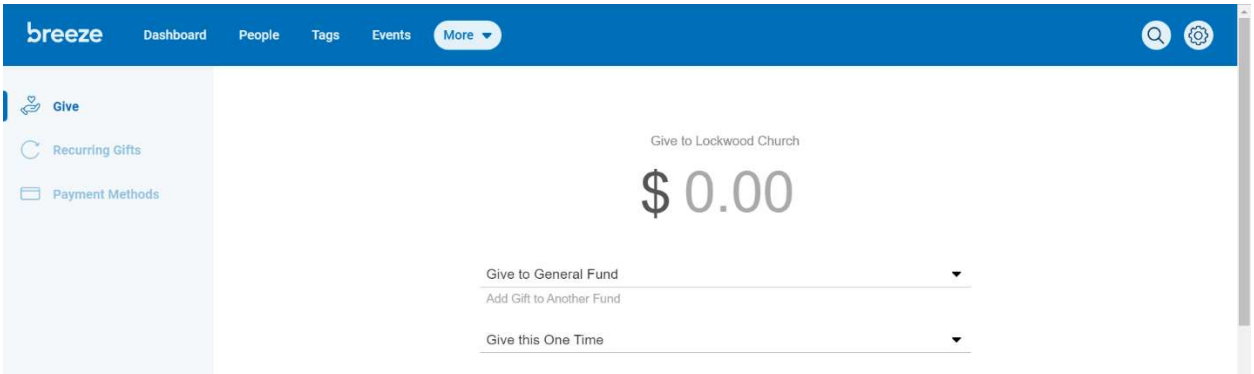
Step 1: Go to "Give Now"

Login to your Breeze account, click on "More" in the top menu and select "Give Now."



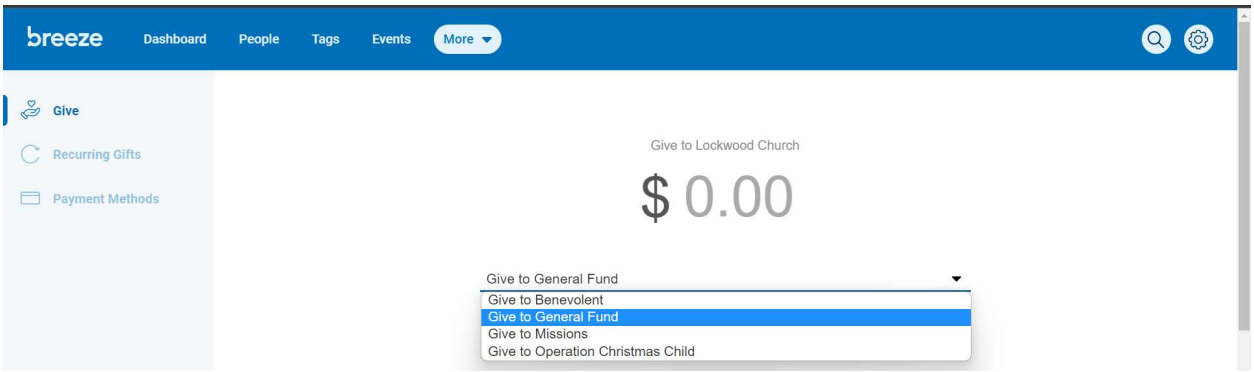
Step 2: Fill out the Form

You will be redirected to the giving page. Most of what you will see is very self-explanatory. However, there are a few fields on this site, you will want to pay close attention to.



You first will have to decide how much and how often you would like to give to LCC. You have the option to make a one-time gift, to give weekly, every 2 weeks, monthly, or yearly. This is completely up to your personal preference. The amount you enter **will not** automatically adjust.

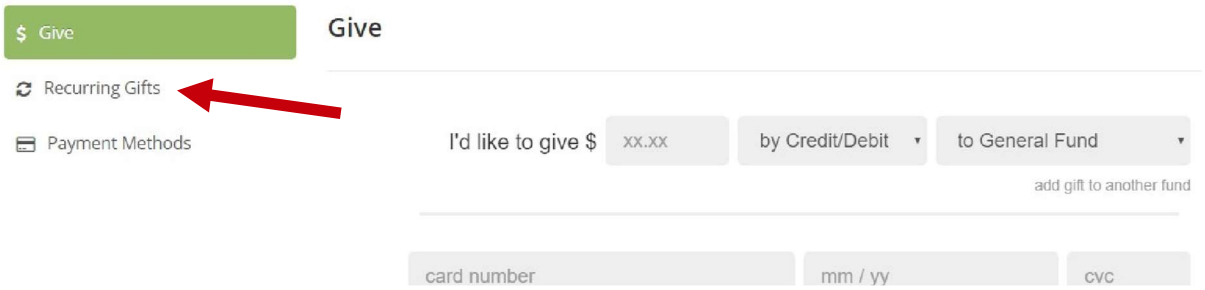
Let's say you would like to gift $50 per month. You enter $50.00 into the "Give to Lockwood Church" field and then choose from the drop-down menu how often you want to give. If you decide to give "monthly," $50 is fine. However, if you decide to split it up and give "every 2 weeks" instead, you will have to adjust the amount to $25 in order to give $50 a month. In other words, please make sure you do the math before you save and confirm your gift.
The other field that requires your special attention is a drop-down menu allowing you to choose which LCC fund you would like to donate to. By default, this field is set to "General Fund."



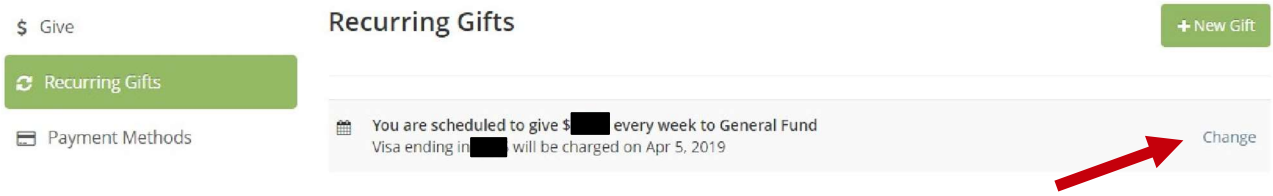
If you would like to donate to more than one fund, simply repeat the entire process, and change the fund you would like to donate to.

Step 3: Making Changes to your Recurring Gift

If you set up a recurring gift, like the $50 per month from the example above, you can make changes to the amount, frequency, the fund it goes to, or the bank or card information you are using, at any time. To do that, click on the "Recurring Gifts" button in the left-hand menu.

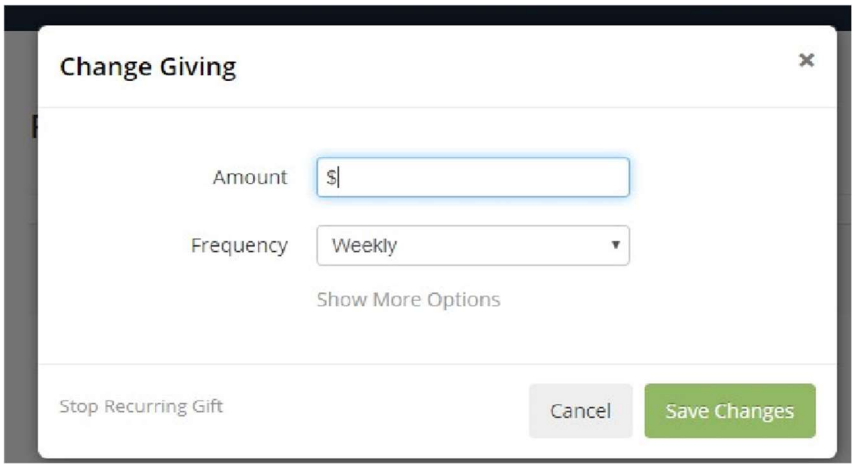


Since Breeze is storing your information, you will find a list of all different gifts you have set up. In the following example, we only have one weekly recurring gift.

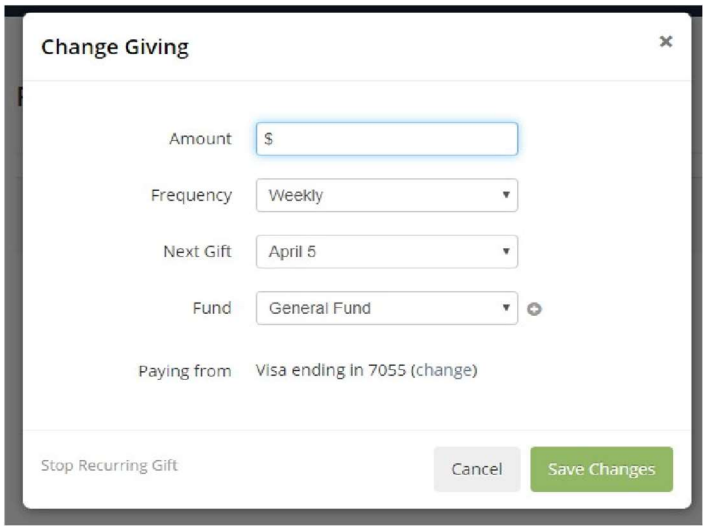


If you would like to change any aspect of your recurring gift(s), click on the "Change" button on the right-hand side.

A new window will pop up and it will look like this:



Click on "Show More Options." It will then look like this:



You now can change whatever you need to change by simply editing the respective fields and then saving your changes. You can also cancel your recurring gift by clicking on “Stop Recurring Gift” in the bottom-left corner.

If you need to change/update your card information, you can do that as well. Click on “change” following your card/bank information. You will have to re-enter all your bank/card information, even if you only need to update your card's expiration date or similar. Again, don't forget to save your changes.

These are only the basic functions and the, hopefully, easiest ways of setting up/editing your gifts. Feel free to play around and familiarize yourself with Breeze. You might find different ways of doing things.

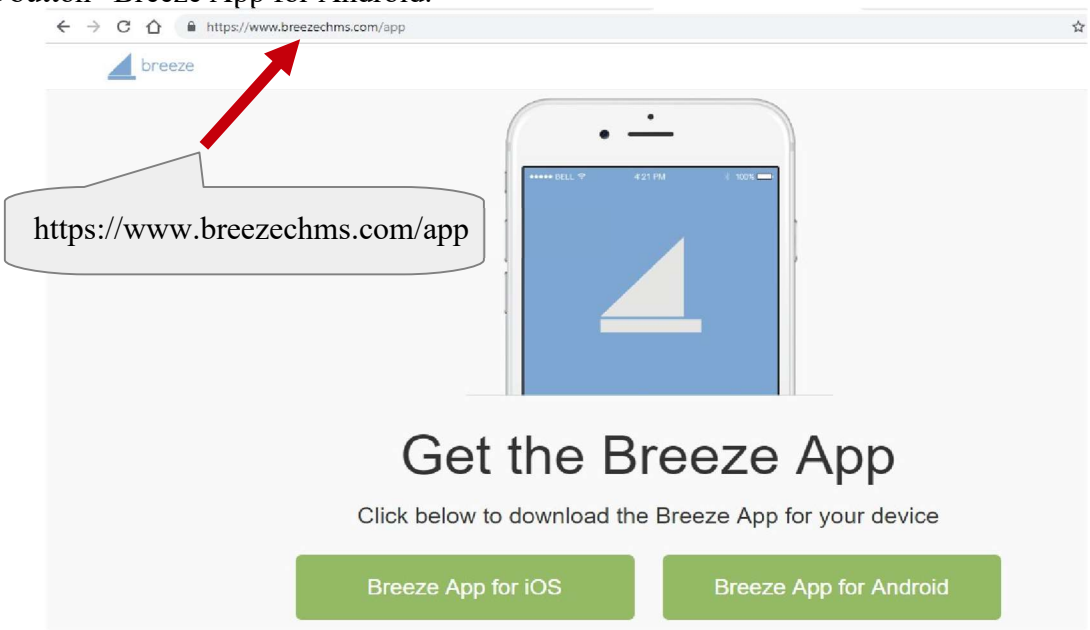
7. Installing the Breeze App

Breeze does not only have a website but also an app. This app can be installed onto your phone or your tablet and makes it especially easy if you would like to quickly look up a church family member, their contact information, and/or if you would like to call them or write them an email from your phone. However, at this point in time it is *not recommended* that you use the app to upload your profile or family picture, as the app is still in need of some fine tuning.

Downloading the App

In your phone's or tablet's browser (Chrome, Safari, Firefox etc.) go to the website https://www.breezechms.com/app.

If you are using any product made by Apple (iPhone, iPad, …), click on the first button “Breeze App for iOS.” If you are using a smartphone or tablet that is not made by Apple, click on the second button “Breeze App for Android.”



The website will then redirect you to a new window. In this window you will see an “Install” button close to the Breeze icon. After clicking on this button, your device might prompt you to agree, to enter a password, or scan your fingerprint (if applicable). Simply follow your device's instructions until it installs the app. After a short while, you will find the Breeze icon on your device.

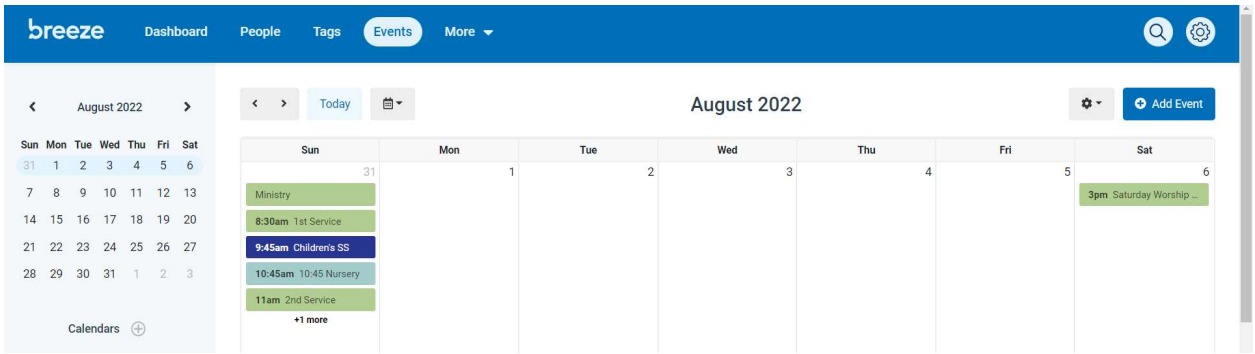
After opening the app for the first time, it will ask you whether you would like to “Connect” or “Learn more.” Click on “Connect.” The next step will be to enter your “Church ID.” Write in “Lockwood” and click on “Continue.”

Now, the app should prompt you to sign in. Enter your username and your password and you are all set!

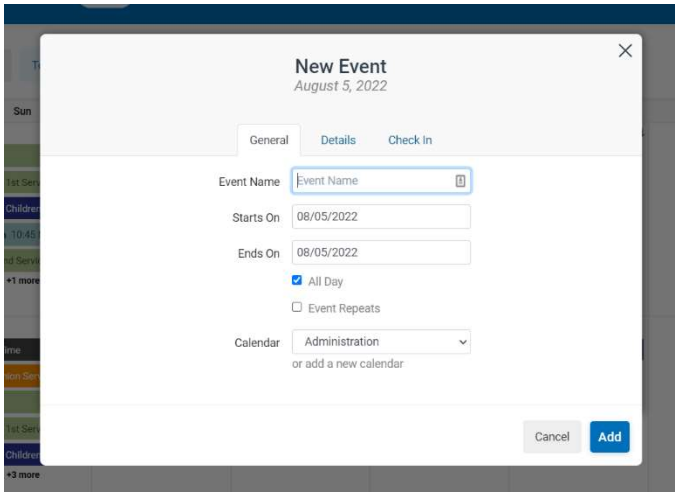
8. Creating / Managing an (Volunteering) Event

1. Create an Event

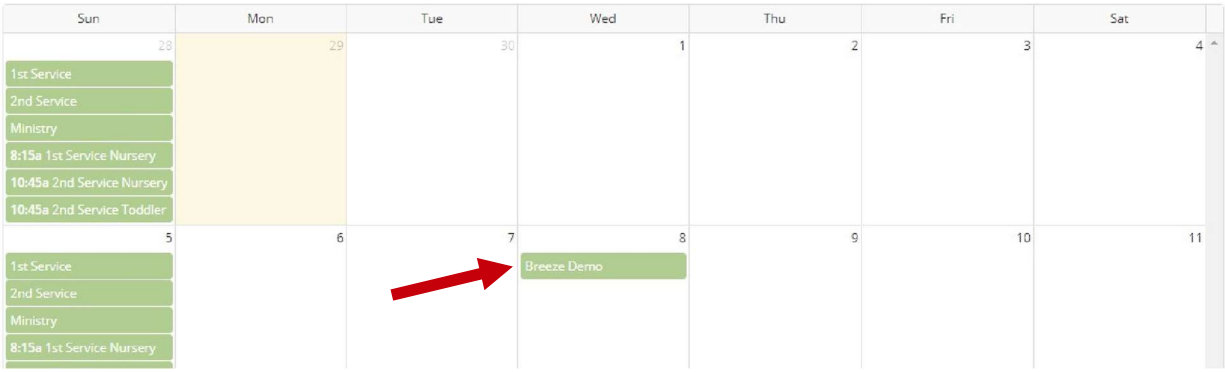
In order to create a new event, select the “Events” tab from the top right. This will lead you straight to the calendar.



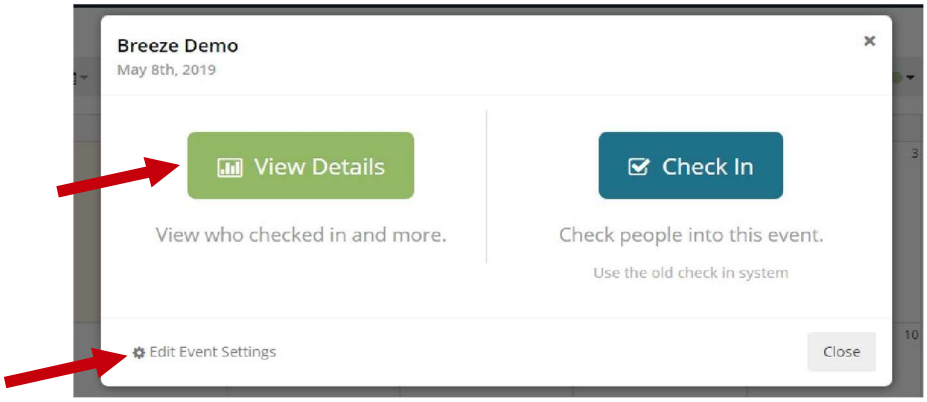
Next, click on "+ Add Event." A new window will pop up and you will have to name the event, decide on which day it is going to take place, if it is a recurring event, and to which calendar you would like to add your event. Under the "Details" tab you can add an event description and event location. When you are done, click on the "Add" button.



If you now go back to the calendar (by selecting the event tab), you should be able to see your event.

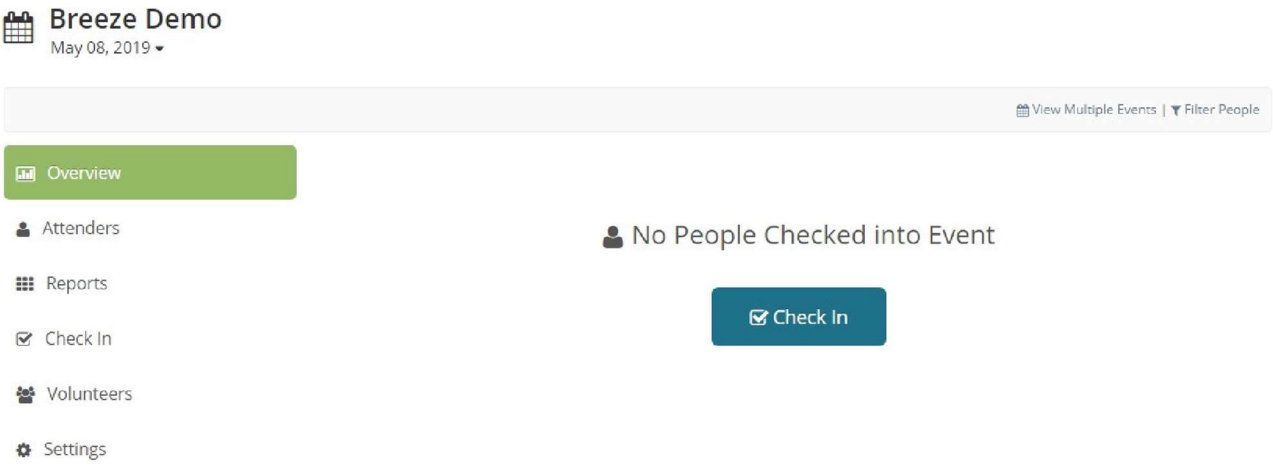


You can click on your event in order to change your event settings or to see details about event. A new window will pop up.



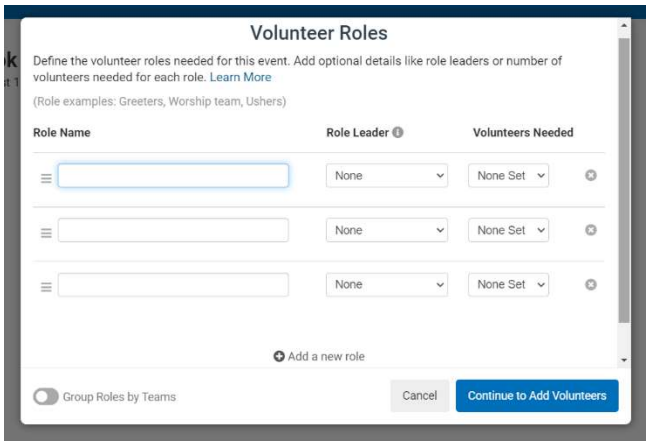
If you click on "Edit Event Settings," you will be able to change the event name, the date, the calendar it is assigned to, the location and the description of your event.

If you click on "View Details," you will see the following:



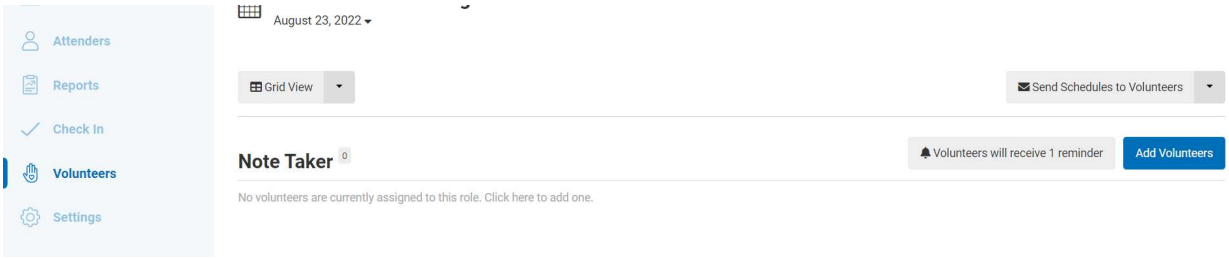
2. Adding Volunteers to Your Event

Again, you can play around and find out what options are available to you, but the tab that is of most interest to you, is the "Volunteers" tab on the left. You will then see a new window:



You need at least one “Role Name,” you can leave “Role Leader” and “Volunteers needed” blank. Unfortunately, you can’t just skip this step, although it’s not really needed for smaller events. [It comes in handy when you try to organize the entire first or second service incl. Coffee Time, Bulletin Greeter, Door Greeter, etc. Those would constitute the roles and the people in charge of these sub-ministries would be the Role Leaders.] You can x-out of the other lines, and then click on “Continue to Add Volunteers.”

Breeze will now give you an option to either assign volunteers or to invite them. Select “assign.” You will then be taken to a new window. (Feel free to play around with the invite option, but the instructions that follow only apply to assigning volunteers.)



Click on the blue “Add Volunteers” button on the right side. You are now able to manually enter the names of volunteers who signed up for your event. You can add as many people at a time as you would like to. You can also choose to see a list of recent volunteers or a list of people that are associated to a certain tag and then choose people from there. Don't forget to hit the “Add” button when you are done.

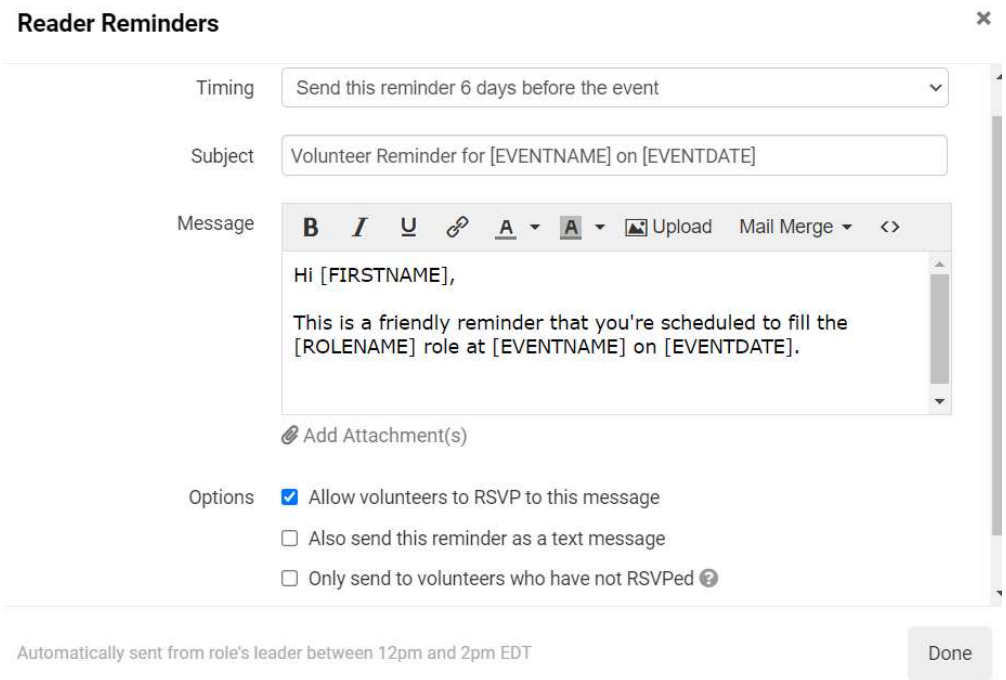
3. Contacting Your Volunteers / Having Them RSVP

You now have a list of volunteers. By default, the volunteers will receive a reminder email 3 days before the event takes place. You can change that or create additional reminders by clicking on “Volunteers will receive 1 reminder.”

You can also send your volunteers an email with additional details by clicking on the small arrow next to “Send Schedules to Volunteers.” A drop-down menu will appear and give you different options (feel free to play around with the options); select “Email Volunteers.” You can now write your email and hit “send” when you are done.

If you would like your volunteers to RSVP, you will have to use a reminder. Click on "Volunteers will receive 1 reminder." Reminder 1 (3 days before the event) is turned on by default. If you would like to keep this reminder, enable "Reminder 2," and then click on "Customize." (Otherwise, you can also customize "Reminder 1.") In the first field, you can now select when you would like to send the reminder. You can change the subject if you would like, but by default, it will auto-fill-in the event name and the event date, so you might want to just leave it as it is. The same holds true for the message. You can add to it, but it's advisable to keep the suggested text as part of the email. There are three options below the message window.

1. Option 1 is "Allow volunteers to RSVP to this message." You want to select that one. Breeze will then automatically add a way to RSVP to the email the volunteers receive. There will be a small RSVP button in the email the volunteers can click on, it will then ask whether they want to decline or to accept. (Volunteers can always go back to the email and change their answer.)



2. Option 2 allows you to send the reminder via text message in addition to email.
3. Option 3 will only send the reminder to volunteers who have not RSVPed yet.

In case you included an RSVP button, you will be able to see your volunteers' responses by going back to the Volunteers page. Next to each name you find a small circle. A green circle means that the volunteers confirmed their attendance, a red circle means that they won't be able to make it, and a gray circle means that they have not answered yet. If you right-click on a name, you can also manually change their status.

Well, you did it. At this point, you are familiar with the basic functions of Breeze. In case you run into problems that were not addressed here, try to find an answer to your question on the Breeze help site https://support.breezechms.com/hc/en-us or contact the office: office@lockwoodchurch.org or 517-279-7536.