

Portal: How to guide 2. How to view members or contacts

A guide to explain how to view members or contacts details on the Portal

September 2019

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# How to view members or contacts

- 1. To start, go to the Portal <u>(https://portal.mssociety.org.uk)</u> and login. If you can't remember your password, please follow the "How to re-set your password" procedure.
- 2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "go".

Manage Groups	Members Volunteers Services & Activities
	Manage Groups
	Please contact the Supporter Care team on 0300 500 8084 or supportercare@mssociety.org.uk if you need any help or support with the Portal.
	Start typing the first few letters of a group or structure in the box below, after a few seconds it will autocomplete the relevant groups. Select the appropriate one and click the 'Go' button.
	Choose a group by title
	Brent Group
	Gol
	<b>7</b>

3. Next click on the tab that says "List of Members and Contacts"

Manage Groups	Members Volunteers Services & Activities
	Manage Groups / Brent Group
	Brent Group
	Basic Information List of Members and Contacts List of Volunteers Group Services and Events Properties Vehicles
	Contact Details Information

4. You will then see the list of members and contacts for that group. Please note that by default, the list will show both members and contacts with the newest members/contacts at the top and will show 10 members/contacts per page unless you change the view settings.

## Brent Group Members and Contacts

Basic Informati	on List of Me	mbers and Contacts	List of Volu	nteers Gro	oup Services and E	vents Propertie	s Vehicles	
Below is a list Displaying 1 -	of all of the active 10 of 75	members and contact	s of this structu	ure.				
Relationship to g	group contacts	Y						
Items per page		V						
Apply								
First Name La	st Name	Email		Home Phone	Mobile	Membership Status	Membership Date Joined <del>•</del>	On group contact list?

If you would like to change to viewing just members or just contacts, please select the relevant option on "Relationship to group" and then click apply.

If you would like to view more members/contacts per page, then please select the relevant option on "Items per page" and press apply.

5. To show more details about the member/contact then shown on the list, please click "view" at the end of the row showing their details.

<u>First</u> <u>Name</u>		Home Phone	Mobile		Membership Date Joined 🕶			
Test	Member 2			Active	07/02/2019	No	View	

 You will then see a screen showing that individual member/contact's details (see example below). Please note where it says "Constituent ID" this is their unique reference number and, for members, their membership number. Test Member 2

Basic Information	Roles	Training	Checklist	Additional Requirements	Group Relationships
Address					Email & Phone
Address England NW2 6ND					Home Phone:  Mobile Phone:  Email: 
Membership Info	rmation				Emergency Contact
Constituent ID: 1022182 Group:  Date Joined: 07/02/2019 Status: Active					Emergency Phone:  Emergency Contact: 

If you experience any difficulties when viewing members/contacts and so cannot follow the procedure above, please email the Supporter Care Team at <u>supportercare@mssociety.org.uk</u> or give us a call on 0300 500 8084 (Monday-Friday, 9am-5pm).

You can also check the Portal Guidance document for the answers to the most frequent Portal questions. It is available for download once logged into the Portal on the top right hand side of the screen.



#### We're the MS Society.

Our community is here for you through the highs, lows and everything in between. We understand what life's like with MS.

Together, we are strong enough to stop MS.

mssociety.org.uk



### **Contact us**

MS National Centre 020 8438 0700 info@mssociety.org.uk

MS Helpline Freephone 0808 800 8000 (weekdays 9am-9pm) helpline@mssociety.org.uk

Online mssociety.org.uk facebook.com/MSSociety twitter.com/mssocietyuk

MS Society Scotland 0131 335 4050 msscotland@mssociety.org.uk

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#### MS Society Cymru

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