

Portal: How to guide
3. How to sort member and contact lists online

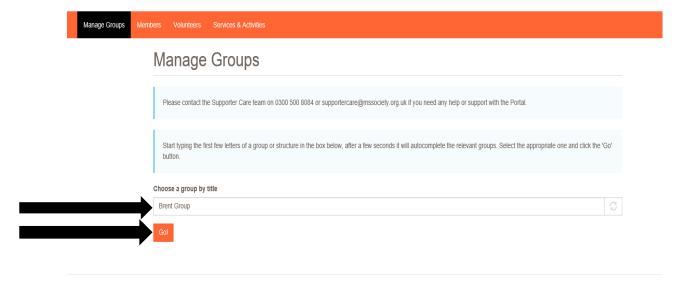
A guide to explain how to sort the member and contact list online on the Portal

Let's stop MS **together**

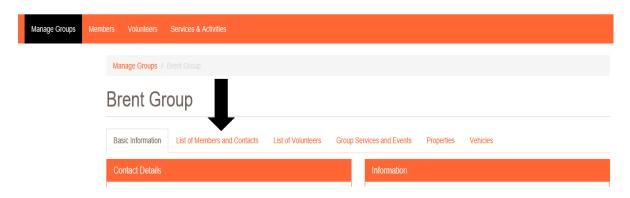
How to sort member and contact lists online

If you're viewing the membership/contact list online rather than downloading a copy, the list will automatically show the newest members or contacts at the top of the list. If you would like to change this, you can by sorting it in a variety of ways: alphabetically, by membership status, by date joined, by email or by if someone is on the contact list.

- 1. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.
- 2. Once you're logged in to 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".



3. Next click on the 2^{nd} tab under the Group name that says "List of Members and Contacts"

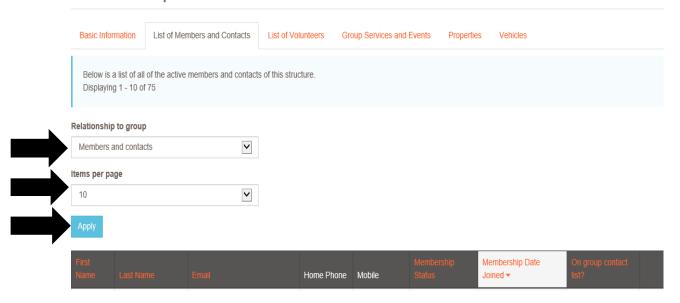


4. You'll then see the list of members and contacts. By default, the list will show both members and contacts with the newest members/contacts at the top and will show 10 members/contacts per page unless you change the view settings.

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

Brent Group Members and Contacts



- 5. If any column header is in orange, it means you can click on it to sort the list (see arrows on image on next page). You can sort in a variety of ways:
 - Alphabetically to sort the list alphabetically by last name, click on the
 word "Last Name" on the column header. Your list will then be sorted
 alphabetically A-Z by surname. If you click the word "last name" again, it
 will sort the list alphabetically but from Z-A. You can do the same if you
 want to sort the list alphabetically by first name by clicking the "First
 Name" column header.
 - Membership Status to group all lapsed members together, click on the "Membership Status" column header and your list will then be sorted by bringing all the lapsed members to the top of the list. If you click the word "membership status" again, it will bring the active members to the top of the list.
 - Date Joined to sort the list by date joined as a member or contact, then
 you're in luck as the default setting for the Portal list will show newest
 members/contacts at the top automatically. To view the longest standing
 members/contacts at the top, then click on the "Membership Date

Joined" column header and your list will then show the longest standing members at the top.

- Email to sort the list by email, if you click on the "Email" column header then the list will show those individuals without an email at the top of the list and then move on to show the rest of the email addresses alphabetically A-Z. If you click the word "email" again, it will show the email addresses alphabetically Z-A and the list will end with those without an email address.
- If someone is on the contact list to group together those who are on the contact list and those who are not, you'll need to click the "On group contact list?" column header. If you click it once, those not on the contact list will be at the top of the list and if you click it twice, those on the group contact list will be at the top.



If you experience any difficulties when sorting the list and so cannot follow the procedure above, please email the Supporter Care Team at supportercare@mssociety.org.uk 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.





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We understand what life's like with MS.

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mssociety.org.uk



Contact us

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