

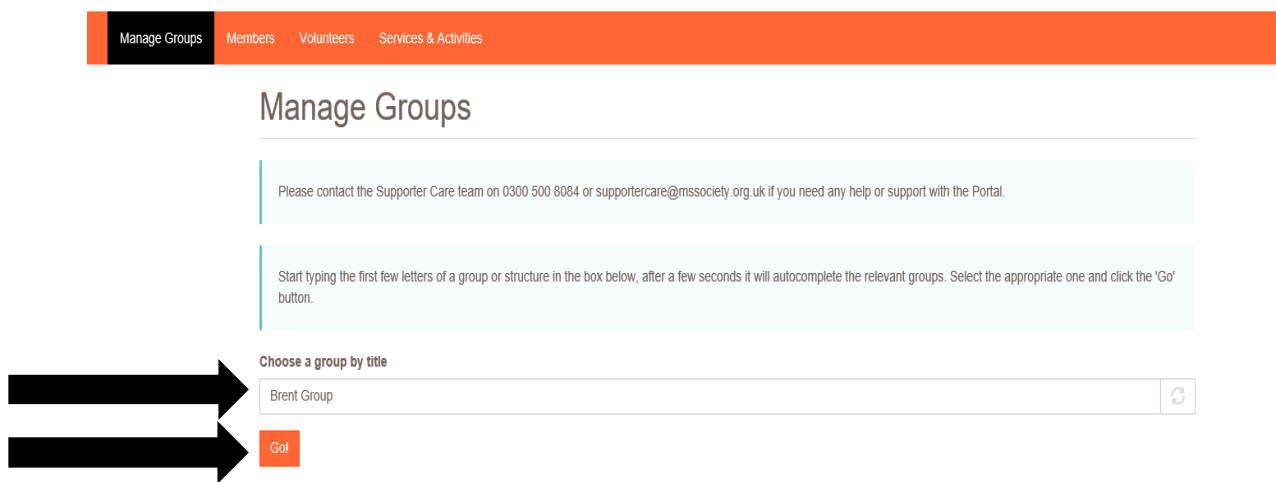
The background features several large, overlapping orange shapes in various shades of orange and yellow, creating a geometric pattern. A thin orange line outlines a large, irregular shape that frames the central text.

**Portal: How to guide
4. How to download a
membership or contact
list**

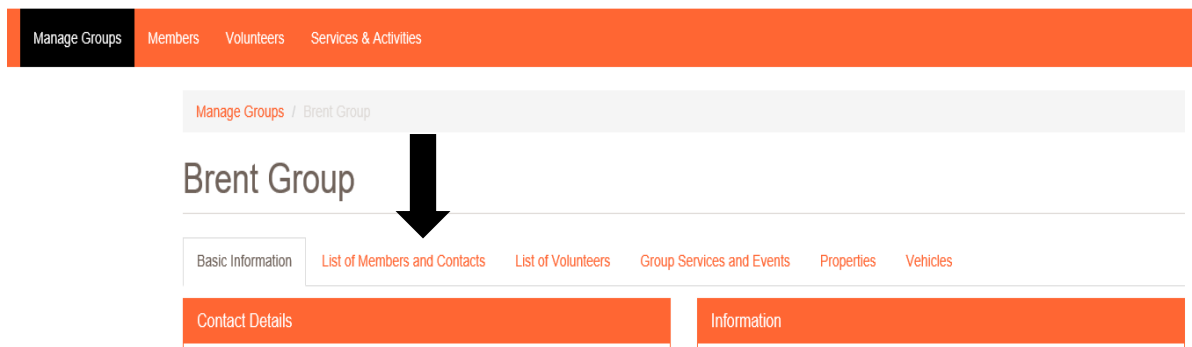
A guide to explain how to
download a membership or
contact list from the Portal

How to download a membership or 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 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".



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



4. On the page this brings up, scroll down the page under the contact details shown for members until you see the word "Downloads" with the option for "Excel" or "Post labels".



5. Click on the "Excel" button.
6. You will then be taken to a new page where you can select what details you would like to download from a list of criteria (see image below). Please select the details you require for your list.

Members and Contacts Download

Please tick the boxes for the columns to include in this download.

Records to download

- Download members and contacts
- Download members only
- Download contacts only

Filter by email?

- Include all
- Only include people we can email

Select / Unselect all

Download Fields

- First name
- Surname
- Email
- Home phone
- Mobile phone
- Address line
- City
- Postcode
- Country
- Region
- Primary Addressee
- Primary Salutation
- Membership Status
- Date Joined
- Date Last Dropped
- Date Last Renewed
- On group contact list
- Additional Information
- Mail preferred

Records to download – Select here if on your list you want to see all members and contacts, just members or just contacts

Filter by email – Select here if you want to include everyone or only people we can email

Download fields – Select what details about the members/contacts your list will hold. Please make sure you select all the fields you would like to see on your list. If you do not select any fields, your list will be blank.

anch

7. After selecting the criteria you want to download, continue down the page to the "Reason for download" box and enter the reason that you require the information.

Download format

Excel spreadsheet

Reason for download *



Details of members and contacts to send newsletter

8. Continue down the page to the password section (as shown below). You need to enter a password of your choosing. This password will be used to password protect the list you download, so you will need to remember this password to open the list of members/contacts which is created.

Password *

For data protection purposes please choose a password to apply to the download.
You will be prompted to enter this password each time you open the file.



9. Continue down the page to the acceptance criteria section. Ensure you read the criteria and then tick the box to confirm you have read it.



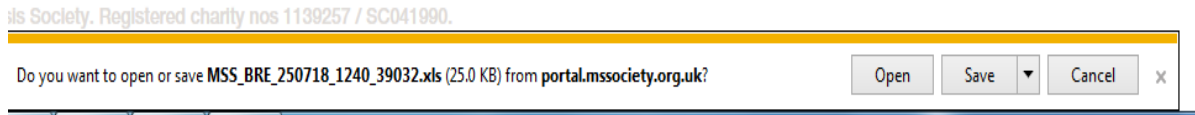
Acceptance criteria - By ticking here I confirm that I am the authorised user of this account and that I will ensure that this personal information is used and stored legally and securely by:
- Always keeping the information encrypted with a password if stored on a computer
- Not sharing, swapping or selling the information with 3rd parties outside the group
- Only sharing with authorised committee members within the group
- Deleting any previous or out of date versions of the information.
- Only using the information for group related purposes
- Reporting any suspected loss or theft of the information immediately to the Supporter Care Centre on 0300 500 8084 *

10. After you've ticked the acceptance criteria box, click the orange download button at the bottom of the screen.

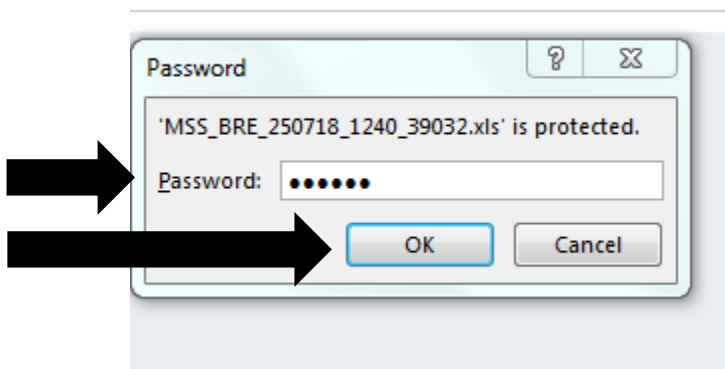


  **Download**

11. After a few moments, you will then see a pop up on your screen to either open or save the information. Please open or save the list. Please note that the pop up may look slightly different to the one below depending on what program you're using to access the internet.



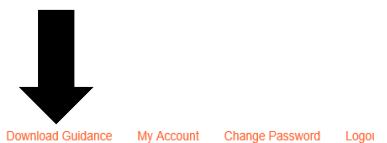
12. When opening the list, you will be asked for a password to open it. This is the password that you set in step 8. Please enter the password and press "ok".



13. Your data list will then open for you with the details you selected in step 6.

If you experience any difficulties when downloading 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.



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

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 **Let's stop MS together**