

The title "Portal User Guide" is centered within a large, stylized orange arrow shape that points to the right. The arrow has a gradient from light orange to dark orange and is outlined in a thin orange line. The background of the entire page features abstract orange and yellow geometric shapes and lines.

Portal User Guide

Guidance on how to access and
edit information in the Portal

10 March 2020

Let's stop MS **together**

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1. Introduction and Overview

The Portal and this guide

The Portal is a website accessed through a web browser like Internet Explorer, Google Chrome or Safari. It provides a range of functionality for MS Society groups including:

- Accessing and downloading member, contact and volunteer information.
- Recording and maintaining information about services and events.

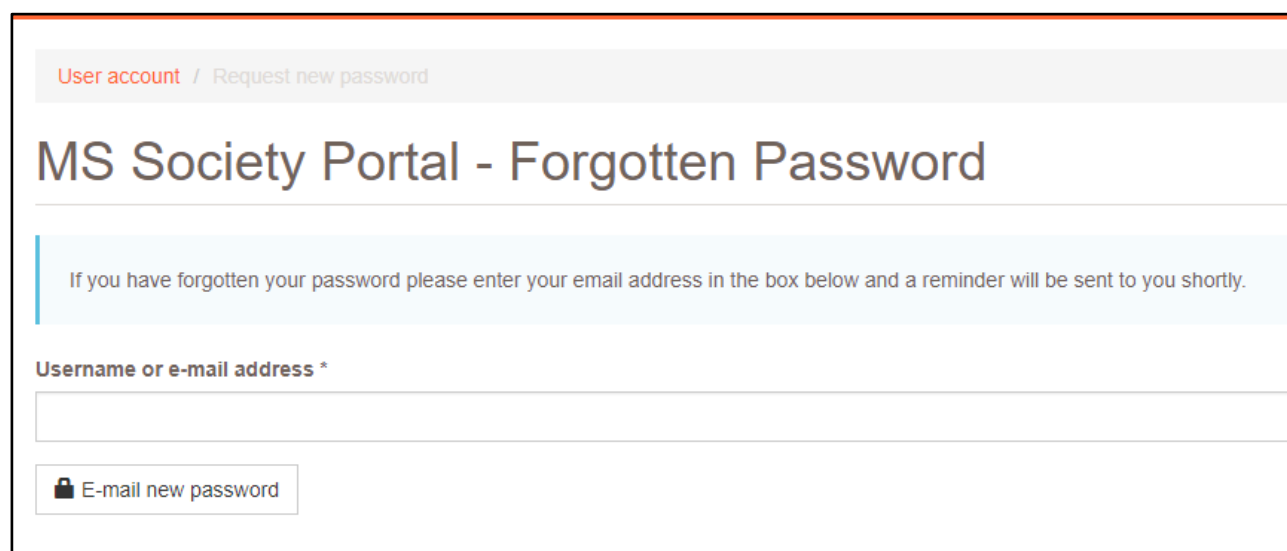
This guide contains detailed step-by-step instructions for the various functions included in the Portal. Currently this is limited to the member, contact and volunteer areas of the Portal but will be expanded to cover other areas shortly.

Getting access to the Portal

If you need access to the Portal for any of the reasons above then please contact our Supporter Care Team to get a login created. If you haven't already done so you will be required to complete our Data Protection e-learning before access is provided.

Logging on and resetting password

To access the Portal go to <https://portal.mssociety.org.uk/> where you will be prompted to login using your email and password. If you forget your password you can use the [Forgot Password?](#) link under the Password field. You will then be prompted to enter your email address to receive a reset link.




User account / Request new password

MS Society Portal - Forgotten Password

If you have forgotten your password please enter your email address in the box below and a reminder will be sent to you shortly.

Username or e-mail address *

 E-mail new password

You will be emailed a reset link which will expire after 24 hours, please check your junk folder if you have not received the email after a few minutes.

2. Member and Contact Information

The Portal provides access to information about members, contacts and volunteers at groups and other structures. This information can be viewed on screen in the Portal and can also be downloaded in different formats.

Members and contacts explained

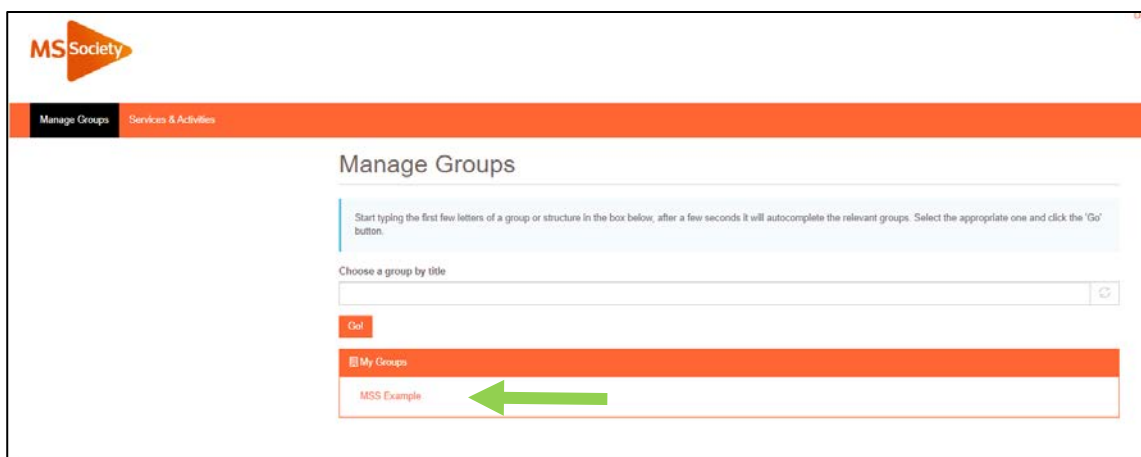
When someone joins the MS Society as a member they are allocated to a local membership group using the postcode of their home address unless they specifically opt-out of being linked to the group. An individual can only be a formal member of one group.

From 2018, groups can also choose to have a contact list that anyone who would like to receive communication from the group can join. People can join the contact list of multiple groups and do not need to be members to do so. This information will be stored on the Society's main database alongside member information and will be available through the Portal alongside member information. People join the contact list of a group through an online form. As a default they will be providing consent for email but can express a preference for mail. Where possible and practical this preference should be honoured when communicating with members and contacts. When downloading member and contact information you can filter the download so that only emailable people are included. You can also include the mail preferred field in the download so that you can filter the information yourself in Excel or similar applications.

To get the contact list switched on for your group please contact ssadminhelpdesk@mssociety.org.uk.

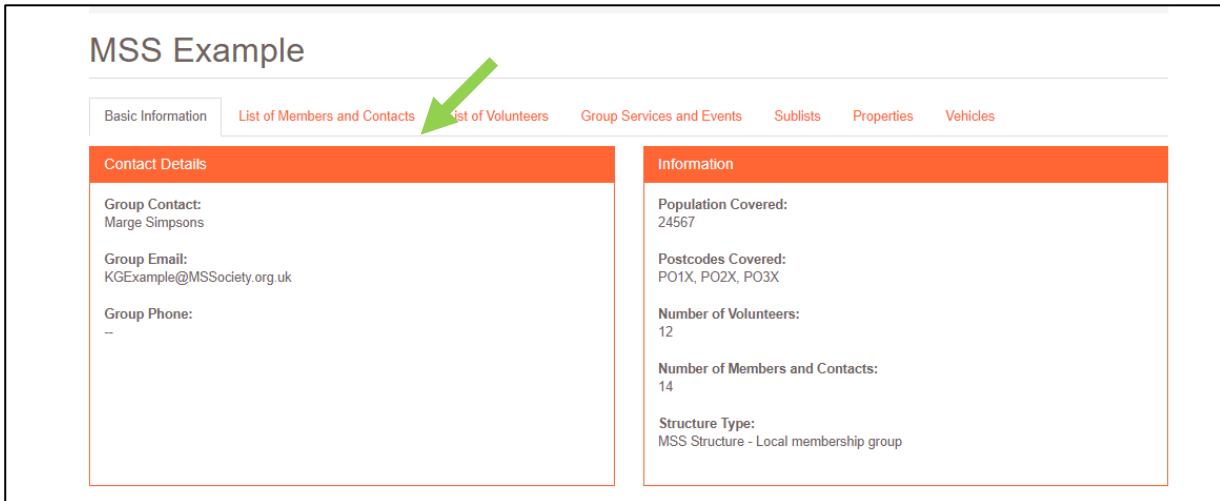
Viewing member and contact data

When you login to the Portal, the home screen includes a list of the groups which you have permission to access in a box called **My Groups**. This is based on the volunteer roles that you hold. Most of the information and functions on the Portal is accessed from the group record and the best way to achieve most tasks is to click the relevant group in this list to begin.

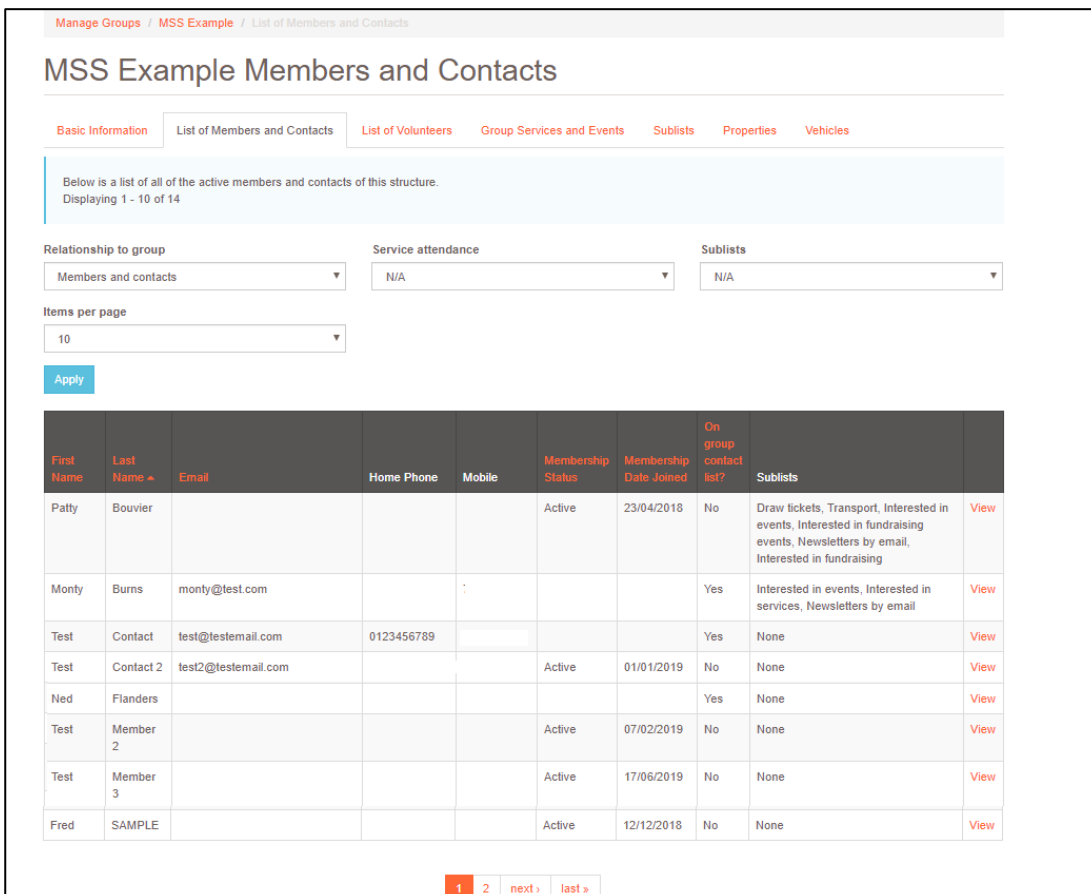


You can also search for groups using the search box called **Choose a group by title**, however the information and actions available to you on groups other than your own will be limited.

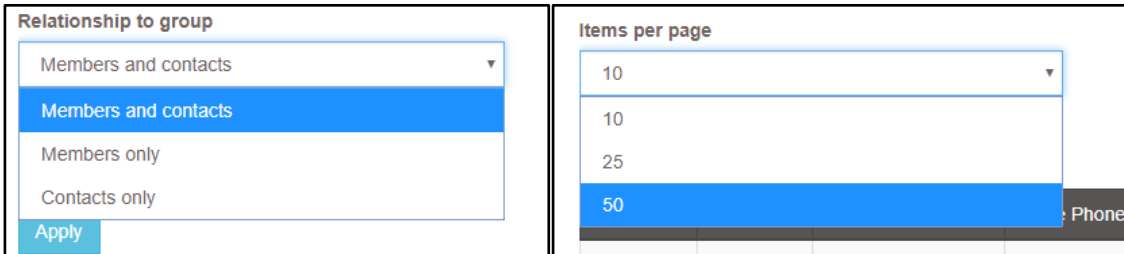
The main group screen contains some basic information about the group and has a series of tabs that may appear depending on your role.



To view member and contact information on screen click on the **List of Members and Contacts** tab and you will see the screen below.



On this screen you can view some key information about the group members and contacts. The list defaults to show you members and contacts, you can change this by selecting the appropriate option in the **Relationship to Group** filter box then clicking apply. Similarly, you can increase the number of records shown on screen using the **Items per page** filter.



If there are more records to display you can navigate through the pages using the page selector



Records displayed in the grid can be reordered by clicking any of the columns with orange column headings. Clicking the column twice will alternate the way the column is ordered. This can be used to identify new joiners (using **Membership Date Joined**), lapsing members (using **Membership Status**) or have the list display alphabetically (using either of the name columns). The arrow next to the column indicates what ordering is currently applied. The default is to show the most recent join date.

	Membership Status	Membership Date Joined ▼
	Active	01/03/2018

Below are some further notes on the information found in each column of the grid.


Table 1. List of Members and Contact view

Column Name	Details
First Name	First name of the person
Last Name	Last name of the person or the organisation name
Email	Email address where known. "No contact by email" means we have an address but the person has opted out of contact by this method.
Home Phone	Home phone where known. "No contact by phone" means we have a number but the person has opted out of contact by this method.
Mobile	Mobile phone where known. "No contact by mobile" means we have a number but the person has opted out of contact by this method.
Membership Status	Can be either Active, Lapsed or blank. The field is blank when someone is on the group contact list but isn't an Active or Lapsed member. Dropped members do not appear in the Portal.
Membership Date Joined	Membership join date
On group contact list?	Can be either Yes or No
Sublists	Sublists linked to this person
View	Link to further information about the individual

Viewing an individual member or contact

To view an individual member or contact, click the **View** link in the **List of Members and Contacts** grid.

First Name	Last Name ▲	Email	Home Phone	Mobile	Membership Status	Membership Date Joined	On group contact list?	Sublists	
Patty	Bouvier				Active	23/04/2018	No	Draw tickets, Transport, Interested in events, Interested in fundraising events, Newsletters by email, Interested in fundraising	View



This will take you through to the individual view screen.

Patty Bouvier

Basic Information
Roles
Training
Checklist
Sublists
Service Attendance

Address

USA
XXX

Email & Phone

Home Phone:
--

Mobile Phone:
--

Email:
--

Membership Information

Constituent ID:
969898

Group:
MSS Example

Date Joined:
23/04/2018

Status:
Active

Date Renewed:

Emergency Contact

Emergency Phone:
--

Emergency Contact:
--

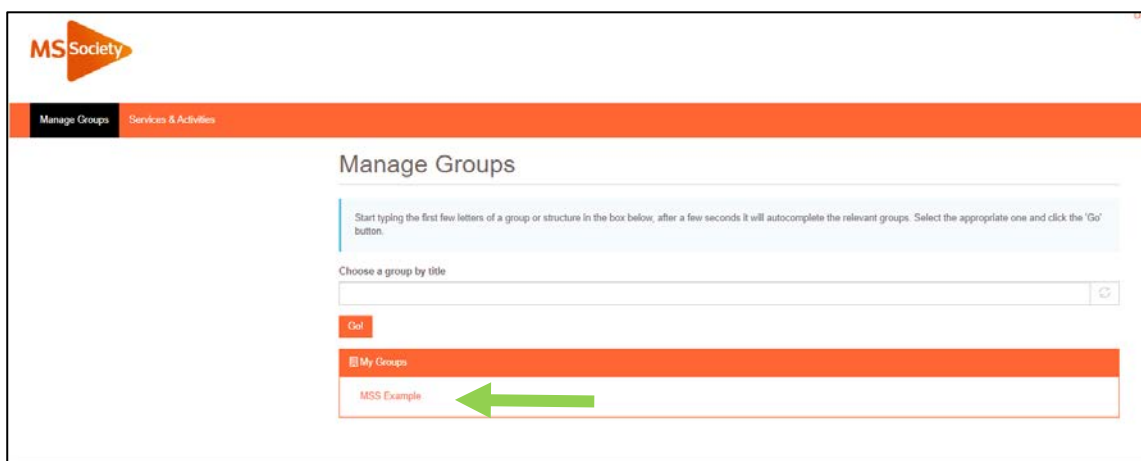
The individual view includes a series of tabs with different information about the person. The tabs you will see will depend on your role.

3. Volunteer Information

The Portal provides access to information about volunteers at groups and other structures. This information can be viewed on screen in the Portal and can also be downloaded in different formats.

Viewing volunteer data

When you login to the Portal, the home screen includes a list of the groups which you have permission to access in a box called **My Groups**. This is based on the volunteer roles that you hold. Most of the information and functions on the Portal is accessed from the group record and the best way to achieve most tasks is to click the relevant group in this list to begin.



You can also search for groups using the search box called **Choose a group by title**, however the information and actions available to you on groups other than your own will be limited.

The main group screen contains some basic information about the group and has a series of tabs that may appear depending on your role.

To view volunteer information on screen click on the **List of Volunteers** tab and you will see the screen below.

Manage Groups / MSS Example / List of Volunteers

MSS Example Volunteers

Basic Information | List of Members and Contacts | **List of Volunteers** | Group Services and Events | Sublists | Properties | Vehicles

Below is a list of all of the active volunteers of this structure.
Displaying 1 - 10 of 12

Items per page
10


Apply

First Name ▲	Last Name	Email	Home Phone	Mobile	Role(s)	
Fred	SAMPLE				Communications Volunteer	View
Homer	Simpson			700123483	Activities volunteer, Group Coordinator, Activities volunteer	View
Kent	Brockman				Group Coordinator, Coordinating Team Member	View
Maggie	Simpson				Branch Volunteer Co-ordinator	View
Marge	Simpsons	marge@simpson.com			Support Volunteer, Group Coordinator, Coordinating Team Member	View
Martin	Prince				Finance volunteer, Coordinating Team Member	View
Ned	Flanders				Administration volunteer, Finance volunteer	View
Selma	Bouvier				Health & Safety Volunteer	View
Test	Volunteer 2				TEST JOB	View

On this screen you can view key contact information about the group volunteers. The **Role(s)** column lists all active roles the person has at the group. Records displayed in the grid can be reordered by clicking any of the columns with orange column headings.

Viewing an individual volunteer

To view an individual volunteer record, click the **View** link in the **List of Volunteers** grid.



First Name ▲	Last Name	Email	Home Phone	Mobile	Role(s)	
Fred	SAMPLE				Communications Volunteer	View
Homer	Simpson			700123483	Activities volunteer, Group Coordinator, Activities volunteer	View
Kent	Brockman				Group Coordinator, Coordinating Team Member	View

This will take you through to the individual view screen which includes a series of tabs with different information about the person. The tabs you will see will depend on your role.

Fred SAMPLE

Basic Information
Roles
Training
Checklist
Sublists
Service Attendance

Address

England

Email & Phone

Home Phone:
--

Mobile Phone:
--

Email:
--

Membership Information

Constituent ID:
1018574

Group:
MSS Example

Date Joined:
12/12/2018

Status:
Active

Date Renewed:

Emergency Contact

Emergency Phone:
--

Emergency Contact:
--

The **Roles** tab shows you more detail on the roles the volunteer holds.

Fred SAMPLE - Roles

Basic Information
Roles
Training
Checklist
Sublists
Service Attendance

Roles

Role	Group or Structure	Start date	End date
Branch Information Volunteer	MSS Example		31/03/2018
Communications Volunteer	MSS Example	01/04/2018	

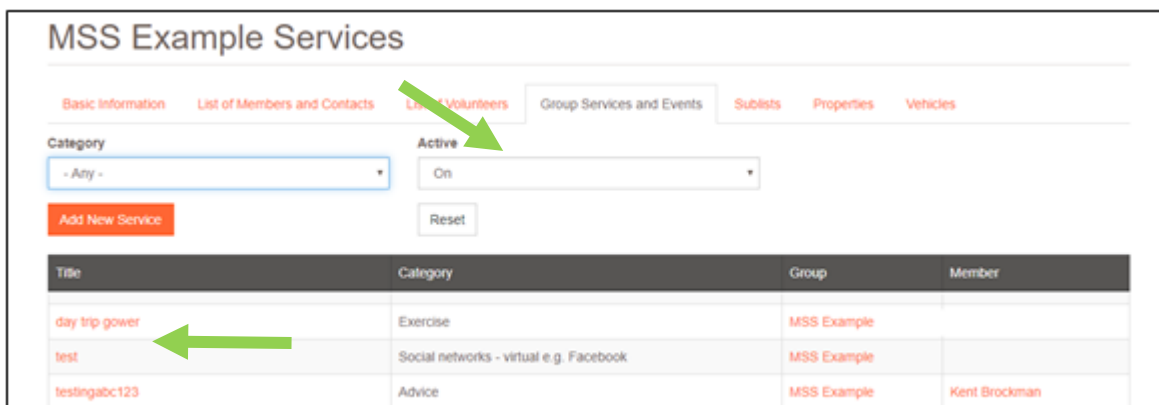
If there is a date in the **End date** column, then the volunteer no longer holds that role.

4. Service Attendance Lists

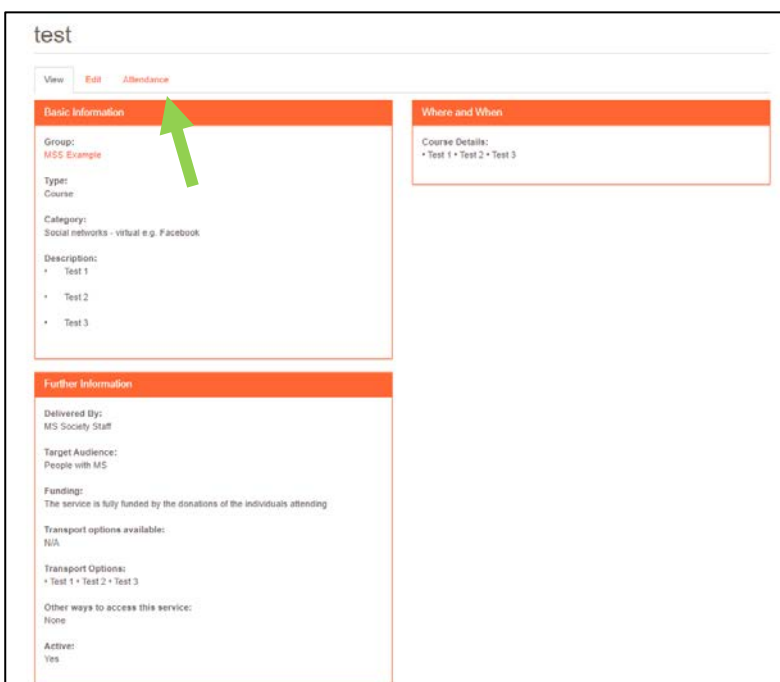
Service Attendance Lists help you keep track of who currently attends a regular service or event, or has signed up for a one-off event. You can then generate lists for contacting these attendees, by email or post, with specific communications about those services or events

On the group's **Group Services and Events** tab, set the **Active** filter to **On** to see all of the current services and events for the group.

Use the orange name link under **Title** to go to the service/event details.



The service/event is presented and there are three tabs. The first shows the service/event information. The third is the **Attendance** tab.



You will see a list of the members and contacts for the group (listed alphabetically by surname) and whether they are an attendee of the service/event. You can display some or all of the members and contacts by changing the **Items per page** filter and clicking **Apply**.

The screenshot shows a web interface for managing attendance. At the top, there are tabs for 'View', 'Edit', and 'Attendance', with a green arrow pointing to the 'Attendance' tab. Below the tabs is a section titled 'Service Attendance' with a light blue background. It contains the text: 'Below is a list of all of the active members and contacts of this structure. Displaying 1 - 10 of 14'. Underneath is a dropdown menu labeled 'Items per page' with '10' selected, and a green arrow pointing to it. Below the dropdown is a blue 'Apply' button. Further down is a section titled 'Operations' with the instruction: 'Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.' Below this instruction is a 'Set attendance' button. At the bottom is a table with the following data:

First Name	Last Name	Email	Attendee?	
Patty	Bouvier		No	<input type="checkbox"/>
Monty	Burns	monty@test.com	No	<input type="checkbox"/>
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
Test	Contact 2	test2@testemail.com	No	<input type="checkbox"/>

A green arrow points to the 'Attendee?' column in the table.

You can update one, several or all of the attendee records by clicking in the boxes to the right of the names (the box in the black title bar will select all on the page).

You set attendance to Yes or No in separate steps.

To add Attendees

Select the members you want to mark as Yes then click on the **Set Attendance** button

Operations

Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.

Set attendance

First Name	Last Name	Email	Attendee?	<input type="checkbox"/>
Patty	Bouvier		No	<input checked="" type="checkbox"/>
Monty	Burns	monty@test.com	No	<input checked="" type="checkbox"/>
Test	Contact	test@testemail.com	No	<input checked="" type="checkbox"/>
Test	Contact 2	test2@testemail.com	No	<input type="checkbox"/>

Set parameters for *Set attendance*

View **Edit** Attendance

Service Attendance

Mark as attending? *

Yes

Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.

Next **Cancel**

Check that the **Mark as attending?** option is showing **Yes** then click **Next**.

You'll see a progress bar then a confirmation message and the attendance status will have updated.

test : Attendance

- Set Patty Bouvier as attending test
- Set Monty Burns as attending test
- Set Test Contact as attending test
- Performed Set attendance on 3 items.

View **Edit** Attendance

Service Attendance

Below is a list of all of the active members and contacts of this structure.
Displaying 1 - 10 of 14

Items per page: 10

Apply

Operations

Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.

Set attendance

First Name	Last Name	Email	Attendee?	<input type="checkbox"/>
Patty	Bouvier		Yes	<input type="checkbox"/>
Monty	Burns	monty@test.com	Yes	<input type="checkbox"/>
Test	Contact	test@testemail.com	Yes	<input type="checkbox"/>

To remove Attendees

Members are set as No (not attending) by default. To change an attendance from Yes to No, select the member or members you want to update then **Set Attendance**.

First Name	Last Name	Email	Attendee?	
Patty	Bouvier		Yes	<input checked="" type="checkbox"/>
Monty	Burns	monty@test.com	Yes	<input checked="" type="checkbox"/>
Test	Contact	test@testemail.com	Yes	<input checked="" type="checkbox"/>

Change the option to **No** then click **Next**.

Set parameters for *Set attendance*

View Edit Attendance

Service Attendance

Mark as attending? *

No

Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.

Next Cancel

You'll see a progress bar then a confirmation message and the attendance status will have updated.

test : Attendance

- Set Patty Bouvier as not attending test
- Set Monty Burns as not attending test
- Set Test Contact as not attending test
- Performed Set attendance on 3 items.

View Edit Attendance

Service Attendance

Below is a list of all of the active members and contacts of this structure.
Displaying 1 - 10 of 14

Items per page
10

Apply

Operations

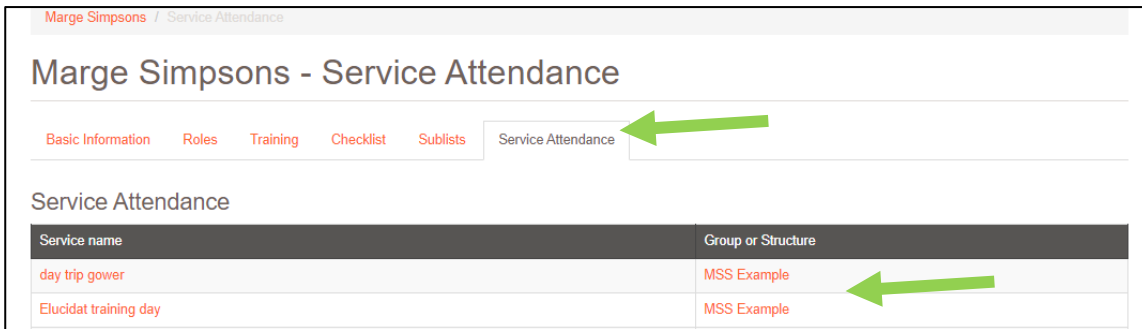
Check the boxes against all those you want to update the attendance status for and then click on the set attendance button for the next step.

Set attendance

First Name	Last Name	Email	Attendee?	
Patty	Bouvier		No	<input type="checkbox"/>
Monty	Burns	monty@test.com	No	<input type="checkbox"/>
Test	Contact	test@testemail.com	No	<input type="checkbox"/>

Viewing which services/events a member is attending

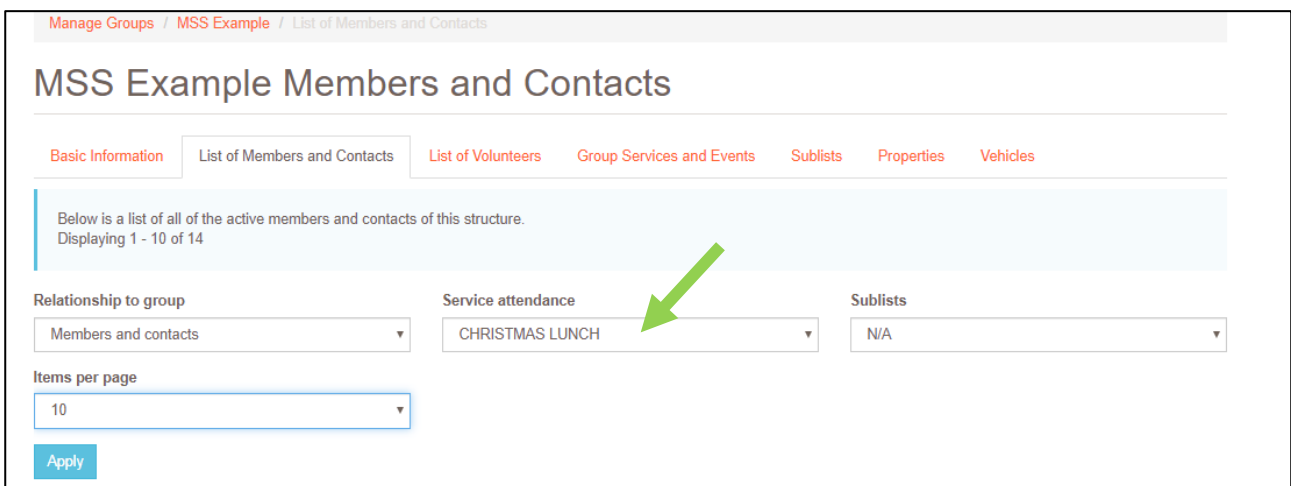
On the person’s record, there is a **Service Attendance** tab which shows you the services/event that person is marked as attending.



You cannot change attendance from the person’s record. You need to click on the link to the service name and update using the Set Attendance process described above.

Once you’ve added all of your attendees, you can view them as a list on the main Members and Contacts page for your group. Change the service attendance filter to show the event and click apply.

The filter only shows active events and services (otherwise the list of options would be very long).

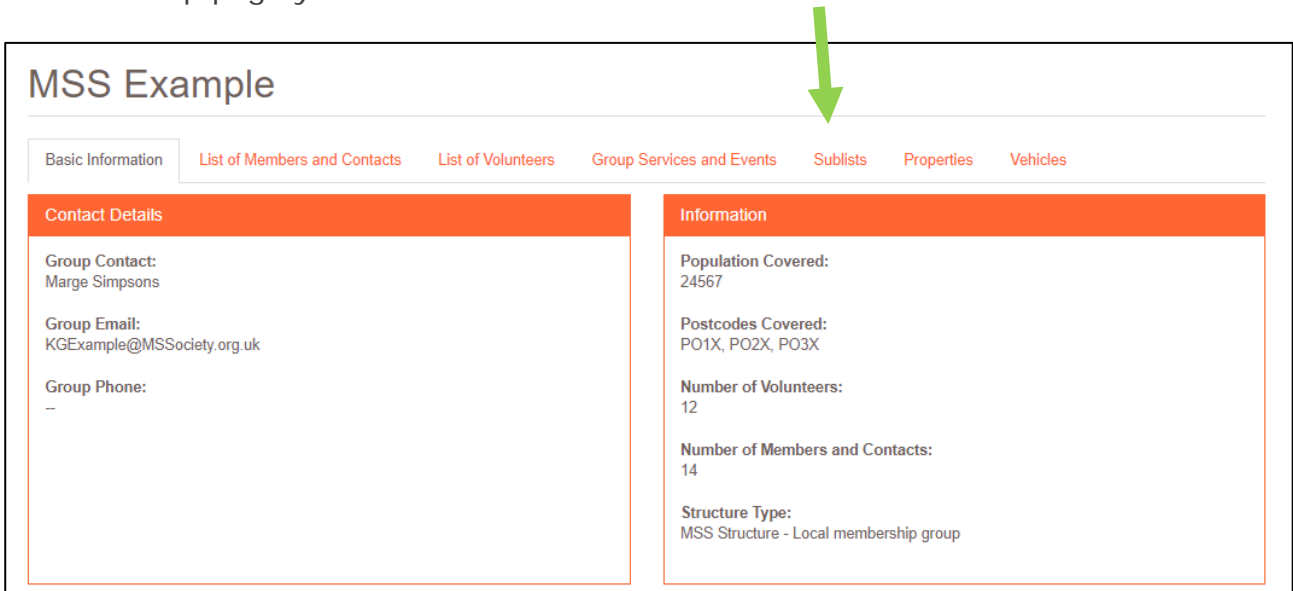


[Section 6](#) gives information on downloading a list of attendees for your event or service.

5. Communications Sublists

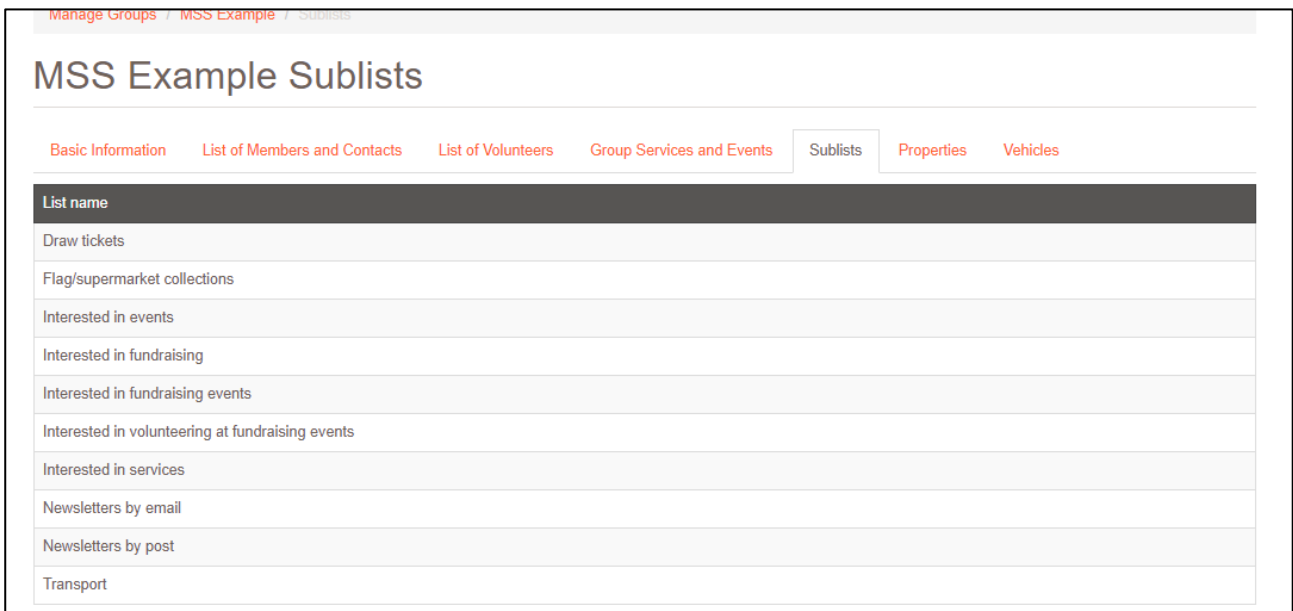
Sublists can be used where members or contacts have given preferences on the type of things they'd like to hear about from the group. They are to help the group in communications and are not compulsory.

On the Group page you will see a **Sublists** tab.



The screenshot shows the 'MSS Example' group page. At the top, there is a navigation bar with several tabs: 'Basic Information', 'List of Members and Contacts', 'List of Volunteers', 'Group Services and Events', 'Sublists', 'Properties', and 'Vehicles'. A green arrow points to the 'Sublists' tab. Below the navigation bar, there are two main sections: 'Contact Details' and 'Information'. The 'Contact Details' section includes 'Group Contact: Marge Simpsons', 'Group Email: KGExample@MSSociety.org.uk', and 'Group Phone: -'. The 'Information' section includes 'Population Covered: 24567', 'Postcodes Covered: P01X, P02X, P03X', 'Number of Volunteers: 12', 'Number of Members and Contacts: 14', and 'Structure Type: MSS Structure - Local membership group'.

This tab shows the sublists available to groups. Groups are not able to create their own sublists.



The screenshot shows the 'MSS Example Sublists' page. At the top, there is a navigation bar with several tabs: 'Basic Information', 'List of Members and Contacts', 'List of Volunteers', 'Group Services and Events', 'Sublists', 'Properties', and 'Vehicles'. The 'Sublists' tab is selected. Below the navigation bar, there is a table with the following sublists:

List name
Draw tickets
Flag/supermarket collections
Interested in events
Interested in fundraising
Interested in fundraising events
Interested in volunteering at fundraising events
Interested in services
Newsletters by email
Newsletters by post
Transport

Add a Member or Volunteer to a Sublist

On the person's record, go to the **Sublists** tab.

You can Add or Remove the person from the sublist using the buttons and **On list?** will update to show you if they are on the list or not.

Patty Bouvier - Sublist Memberships

Basic Information
Roles
Training
Sublists
Service Attendance

MSS Example

Title	On list?	Edit
Draw tickets	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Flag/supermarket collections	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in events	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in fundraising	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in fundraising events	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in volunteering at fundraising events	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in services	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Newsletters by email	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Newsletters by post	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Transport	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>

When you click one of the buttons there will be a slight pause and the screen will then show a confirmation message that the change has happened.

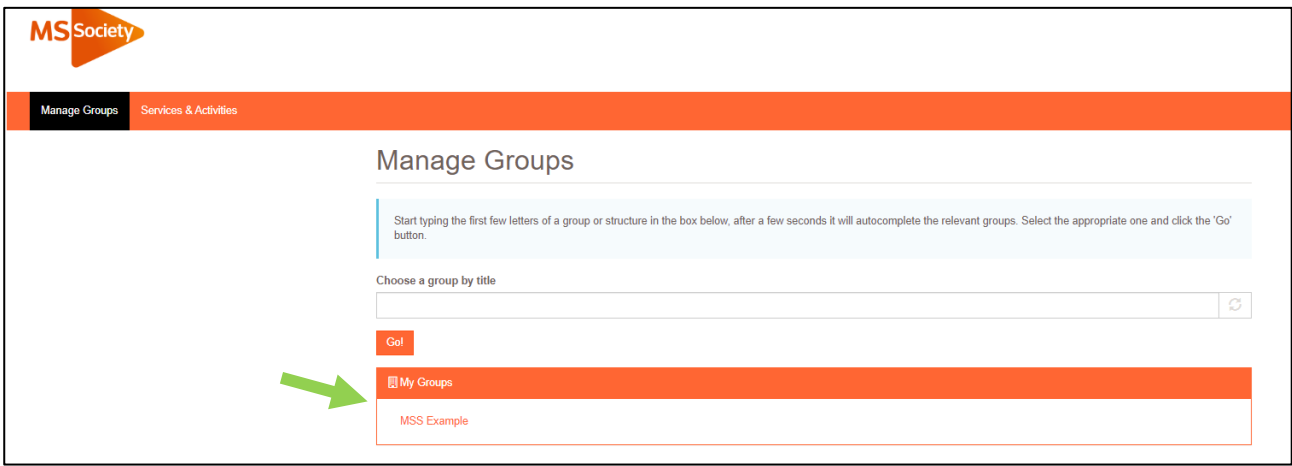
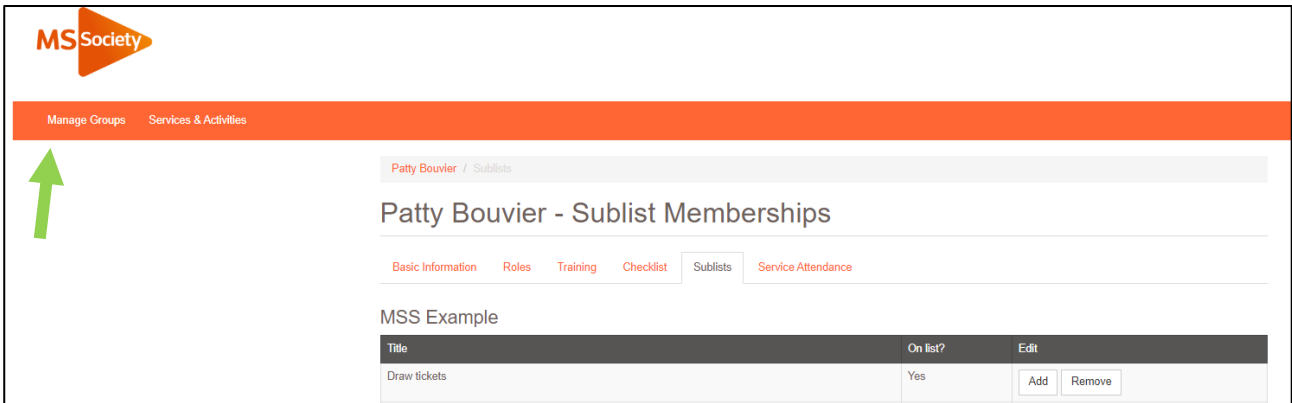
Added *Patty Bouvier* as a member of *Interested in fundraising* at *MSS Example*
×

Basic Information
Roles
Training
Sublists
Service Attendance

MSS Example

Title	On list?	Edit
Draw tickets	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Flag/supermarket collections	No	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in events	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Interested in fundraising	Yes	<input type="button" value="Add"/> <input type="button" value="Remove"/>

To update another person's sublists, go to the **Manage Groups** link then to your group link. If you use the back button, from a person's record, you may undo your current selections.



You will be able to see all the lists that a member has signed up to on the group's Member and Contacts page

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined	On group contact list?	Sublists	
Marge	Simpsons	marge@simpson.com			Active	01/11/2016	No	Flag/supermarket collections, Interested in fundraising events	View
Monty	Burns	monty@test.com		700123486			Yes	Interested in events, Interested in services, Newsletters by email	View
Ned	Flanders						Yes	None	View
Patty	Bouvier				Active	23/04/2018	No	Draw tickets, Transport, Interested in events, Interested in fundraising events, Newsletters by email, Interested in fundraising	View

1 2 next › last »

You can download a list of members and contacts by sublist – see [sections 6](#) and [7](#) below.

6. Downloading Member and Contacts Data

At the bottom of the [List of Members and Contacts](#) screen are two buttons that allow you to download member and contact information.



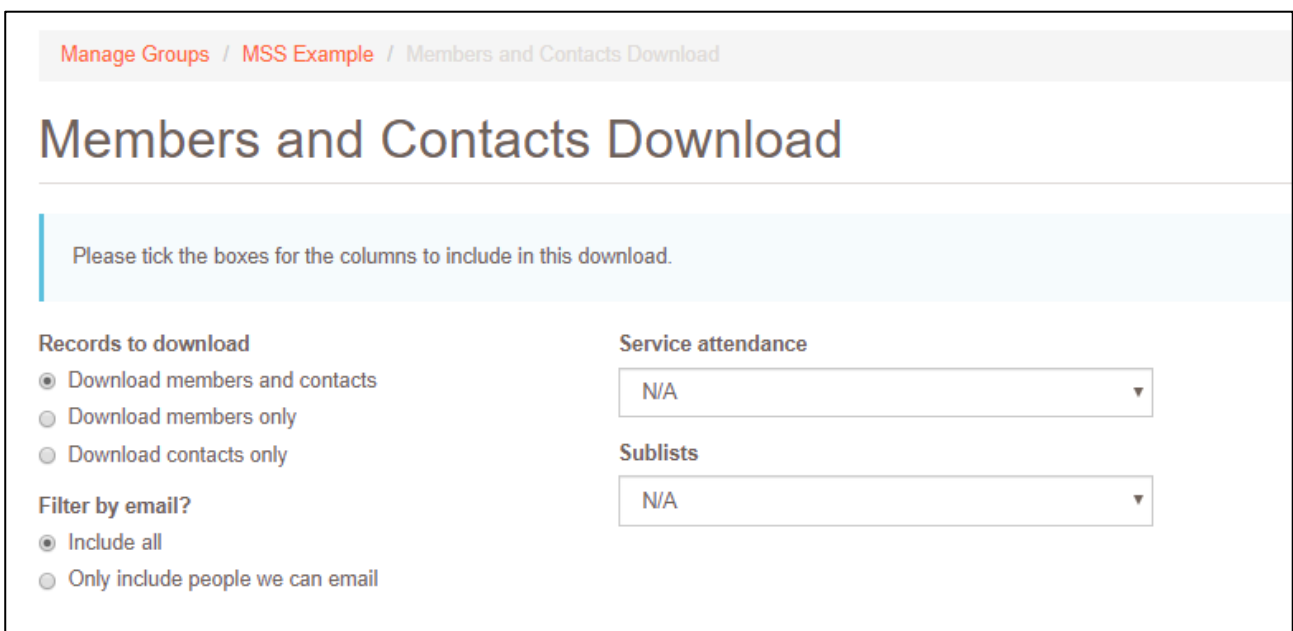
The [Excel](#) option allows you to download a range of fields about the group members and contacts as a password protected Excel file. You can then use this information to send emails or create your own mail merges.

The [Post Labels](#) option allows you to download a PDF of member and contact information that is pre-formatted so that it can be printed on a specific type of labels without needing to do a mail merge.

Downloading member and contact data – Excel

Clicking on the [Excel](#) option in the [List of Members and Contacts](#) screen will open the Members and Contacts Excel Download page.

There are options that control which people will be included in the download and then a series of checkboxes to control which fields will be included for those people.

A screenshot of the 'Members and Contacts Download' page. The breadcrumb trail is 'Manage Groups / MSS Example / Members and Contacts Download'. The main heading is 'Members and Contacts Download'. Below the heading is a light blue box with the text 'Please tick the boxes for the columns to include in this download.' The page contains several selection options: 'Records to download' with radio buttons for 'Download members and contacts' (selected), 'Download members only', and 'Download contacts only'; 'Filter by email?' with radio buttons for 'Include all' (selected) and 'Only include people we can email'; 'Service attendance' with a dropdown menu showing 'N/A'; and 'Sublists' with a dropdown menu showing 'N/A'.

The [Records to download](#) option allows you to select between all members and contacts, members only or contacts only.

The **Filter by email?** option allows you to only download people we can email. The mailing label download page similarly allows you to exclude people that we can email so that between the two you can easily email and mail without overlapping. If someone has expressed a preference for Mail then they won't be included if this filter is set to only include people we can email.

The **Service attendance** option allows you to select people who are attending a particular event.

The **Sublists** option allows you to select people on a particular sublist.

The download also includes any members who have volunteer roles. The Volunteer tab is itself a filter that shows only members with roles within the group.

If no records match the criteria chosen this will be flagged on screen.

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

Sublists

Services attended

Further down the page, you can choose to select specific fields to download or toggle them all on or off using the **Select/Unselect all** check box.

You will then need to enter a reason for downloading the data and a password for the file. The Excel file that you download will be protected with the password entered in this box and you will be prompted for the password each time you open the file. The password does not need to be the same as your login password. Please do not remove the password protection from the file after downloading.

Reason for download *

Sending the monthly newsletter to members and contacts


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.

Compl3x1ty?!

Finally you will need to read and confirm the **Acceptance Criteria** by clicking the checkbox.

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 *

 Download

Click the **Download** button and the Portal will generate the Excel file. This can take up to 30 seconds.

Downloading member and contact data – Post Labels

Clicking on the **Post Labels** option in the **List of Members and Contacts** screen will open the Labels Download page. This page will generate a password protected PDF that has been designed to fit a specific format of labels – KF26051 by Q-Connect or L7160/J8160 by Avery. This PDF can be printed on these labels without needing to do a mail merge between word and Excel.

Manage Groups / MSS Example / Labels Download

Labels Download

This will download a PDF of labels designed to be printed on labels KF26051 by Q-Connect or L7160/J8160 by Avery. Labels are formatted as below.

Mr A N Example
 372 Edgware Road
 Cricklewood
 London
 NW2 6ND

Records to download

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

Filter by email?

- Only include people without an email address or who prefer mail
- Include all

Service attendance

N/A ▼

Sublists

N/A ▼

The **Records to download** option allows you to select between all members and contacts, members only or contacts only.

The **Filter by email?** option allows you to only download people we can email. The mailing label download page similarly allows you to exclude people that we can email so that between the two you can easily email and mail without overlapping. If someone has expressed a preference for Mail then they won't be included if this filter is set to only include people we can email.

The **Service attendance** option allows you to select people who are attending a particular event.

The **Sublists** option allows you to select people on a particular sublist.

The download also includes any members who have volunteer roles. The Volunteer tab is itself a filter that shows only members with roles within the group.

If no records match the criteria chosen this will be flagged on screen.

You will then need to enter a reason for downloading the data and a password for the file. The PDF file that you download will be protected with the password entered in this

box and you will be prompted for the password each time you open the file. The password does not need to be the same as your login password. Please do not remove the password protection from the file after downloading.

Reason for download *

Sending the monthly newsletter to members and contacts

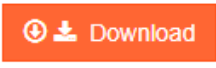
Password *
For data protection purposes please choose a password to apply to the download.
You will be prompted to enter this password each time you open the file.

Compl3x1ty?!

Finally you will need to read and confirm the **Acceptance Criteria** by clicking the checkbox.

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 *

 **Download**

Click the **Download** button and the Portal will generate the PDF file. This can take up to 30 seconds.

7. Download Volunteer Data

At the bottom of the [List of Volunteers](#) screen are two buttons that allow you to download volunteer information.



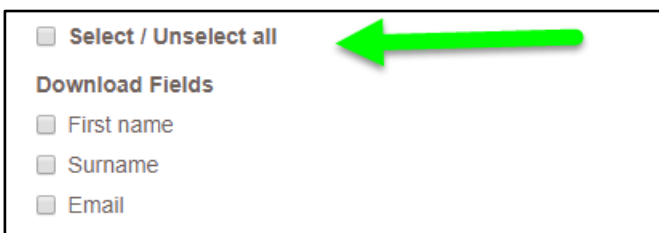
The [Excel](#) option allows you to download a range of fields about the group volunteers as a password protected Excel file. You can then use this information to send emails or create your own mail merges.

The [Post Labels](#) option allows you to download a PDF of volunteer names and addresses that is pre-formatted so that it can be printed on a specific type of labels without needing to do a mail merge.

Downloading volunteer data – Excel

Clicking on the [Excel](#) option in the [List of Volunteers](#) screen will open the Volunteers Excel Download page.

You can choose to select specific fields to download or toggle them all on or off using the [Select/Unselect all](#) check box



You will then need to enter a reason for downloading the data and a password for the file. The Excel file that you download will be protected with the password entered in this box and you will be prompted for the password each time you open the file. The password does not need to be the same as your login password. Please do not remove the password protection from the file after downloading.

Reason for download *

To create an attendance register for volunteer meeting

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.

Compl3xity!

Finally you will need to read and confirm the **Acceptance Criteria** by clicking the checkbox.

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 *

 **Download**

Click the **Download** button and the Portal will generate the Excel file. This can take up to 30 seconds.

Downloading volunteer data – Post Labels

Clicking on the **Post Labels** option in the **List of Volunteers** screen will open the Labels Download page. This page will generate a password protected PDF that has been designed to fit a specific format of labels – KF26051 by Q-Connect or L7160/J8160 by Avery. This PDF can be printed on these labels without needing to do a mail merge between word and Excel.

Manage Groups / MSS Example / Labels Download

Labels Download

This will download a PDF of labels designed to be printed on labels KF26051 by Q-Connect or L7160/J8160 by Avery. Labels are formatted as below.

Mr A N Example
372 Edgware Road
Cricklewood
London
NW2 6ND

You will then need to enter a reason for downloading the data and a password for the file. The PDF file that you download will be protected with the password entered in this box and you will be prompted for the password each time you open the file. The password does not need to be the same as your login password. Please do not remove the password protection from the file after downloading.

Reason for download *

Mailing to volunteers

Password *

Comp13x!ty?

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

Finally you will need to read and confirm the **Acceptance Criteria** by clicking the checkbox.

- 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 *

 [Download](#)

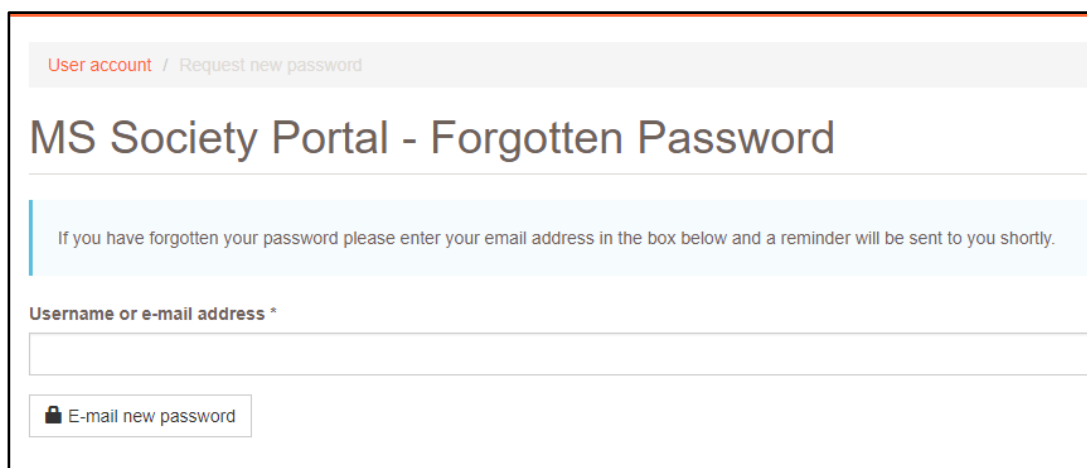
Click the [Download](#) button and the Portal will generate the PDF file. This can take up to 30 seconds.

8. Frequently Asked Questions

How do I reset my password?

If you are logged in and want to reset your password you can use the [Change Password](#) link in the top right of the screen to do this.

If you forget your password you can use the [Forgot Password](#) link under the Password field on the log in screen. You will then be prompted to enter your email address to receive a reset link.



The screenshot shows a web form titled "MS Society Portal - Forgotten Password". At the top, there is a breadcrumb trail: "User account / Request new password". Below the title, a light blue box contains the instruction: "If you have forgotten your password please enter your email address in the box below and a reminder will be sent to you shortly." Below this is a text input field labeled "Username or e-mail address *". At the bottom of the form is a button with a lock icon and the text "E-mail new password".

You will be emailed a reset link which will expire after 24 hours, please check your junk folder if you have not received the email after a few minutes.

How do I change the email address I use to log in?

Contact the Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk to request this is changed on your account.

Can other volunteers at the group access this information?

To be granted access to the Portal the volunteer must be in a certain role, have done the data protection training for volunteers and be given their own log in details. Log in details must not be shared with anyone else.

Contact the Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk with the details of the volunteer who needs access to get them set up.

What does "On group contact list?" mean?

From 2018, groups can choose to have a contact list that anyone who would like to receive communication from the group can join. People can join the contact list of

multiple groups and do not need to be members to do so. If an individual is on your group's contact list the **On group contact list?** field will show as "Yes".

How does my group get a contact list?

Contact ssadminhelpdesk@mssociety.org.uk to switch on the contact list for your group.

How does an individual sign up to our contact list?

Once we have switched on the contact list for your group then individuals can sign up to this list by completing this online form.

<https://signup.mssociety.org.uk/page/21388/data/1>

It's also possible to send individuals a link that would prepopulate your group name, please contact our Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk to get this unique link.

How do we add an organisation to our contact list?

Named individuals at organisations can sign up to your contact list by completing this online form.

<https://signup.mssociety.org.uk/page/21388/data/1>

It's also possible to send individuals a link that would prepopulate your group name, please contact our Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk to get this unique link.

If there is no named individual at the organisation, the organisation can be added to your contact list by contacting our Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk.

Why does it say "No contact by email", "No contact by phone" or "No contact by mobile"?

This means that we have this information but the person has opted out of contact by this method. If the field is blank we don't have the information at all.

Why can't I see Mr Smith on my list?

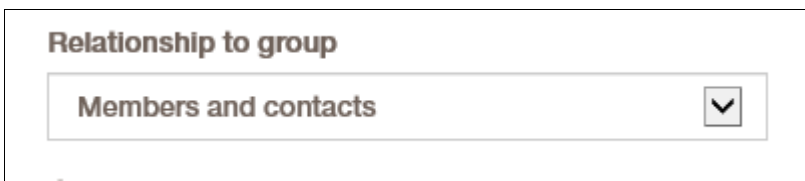
They may be a member of another group, they may not have renewed their membership or they may have opted out of group communications and so their information will not be available to you.

Why is there no membership date joined or membership status information for Mr Smith?

If these fields are blank, it means that they are on your contact list but aren't a member of your group. In this case the [On group contact list?](#) field will display "Yes"

How do I know who is a new member?

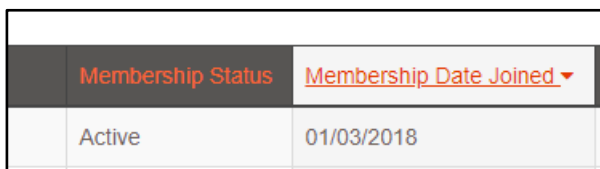
When viewing the list of members and contacts, select "Members only" using the Relationship to group filter box.



The image shows a rectangular box with a title "Relationship to group" in bold. Below the title is a dropdown menu with the text "Members and contacts" and a downward-pointing arrow icon on the right side.

The list is sorted by most recent [Membership Date Joined](#) as default so you should see the newest members at the top of the list.

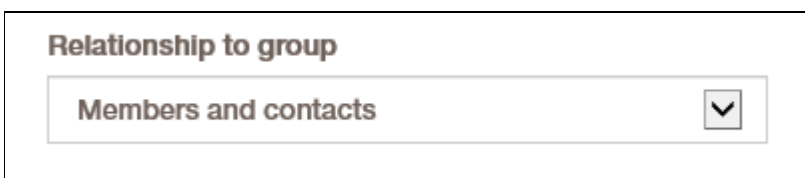
If this isn't how the list is sorted, sort the list by [Membership Date Joined](#) by clicking on the column heading.



Membership Status	Membership Date Joined ▼
Active	01/03/2018

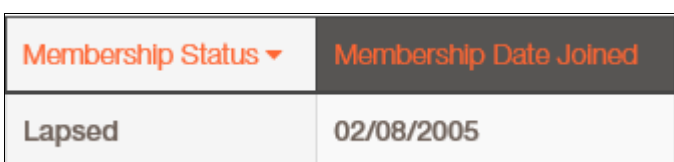
How do I identify lapsing members?

When viewing the list of members and contacts, select "Members only" using the Relationship to group filter box.



The image shows a rectangular box with a title "Relationship to group" in bold. Below the title is a dropdown menu with the text "Members and contacts" and a downward-pointing arrow icon on the right side.

Sort the list by [Membership Status](#) by clicking on the column heading.



Membership Status ▼	Membership Date Joined
Lapsed	02/08/2005

How do I know if/when someone has rejoined after being dropped?

These individuals will appear on your list again once they've rejoined (unless they have opted out of group communications).

You can download **Date Last Dropped** as part of the Excel download which will help you identify these people if necessary.

How do I correct volunteer role information?

Contact the Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk with the details that need correcting. They will update our main database and the information on the Portal will be correct the following day.

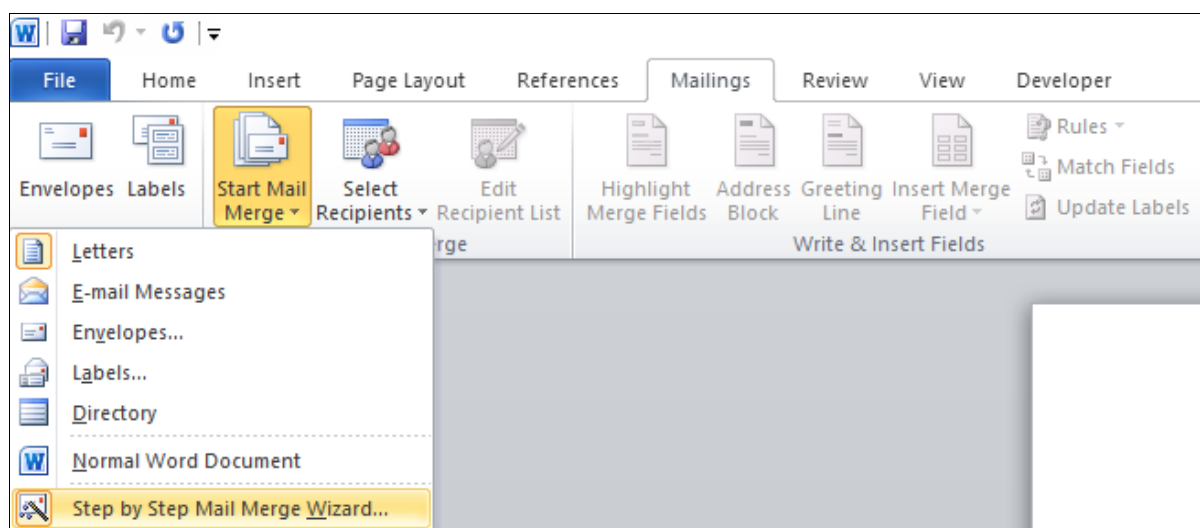
I am having trouble downloading lists/labels

Refer to Section 6 (Member and Contact Information) or 7 (Volunteer Information) for more information on how to download Excel lists and Post Labels.

Please note that the downloads can take up to 30 seconds and that different browsers (Internet Explorer, Chrome, etc) will act slightly differently when the file has been downloaded.

How do I do a mail merge?

Open your downloaded Excel file, enable editing and then open Word and click on **Start Mail Merge** and select **Step by Step Mail Merge Wizard**



The wizard will open on the right of the screen and take you through the steps which include selecting your recipients and writing your letter with merge fields such as name and address.

More information on Mail Merges can be found on the Microsoft support website [here](#).

I am having trouble printing my labels

The PDF created is designed to fit a specific format of labels – KF26051 by Q-Connect or L7160/J8160 by Avery (available from the online shop). This PDF can be printed on these labels without needing to do a mail merge between word and Excel. If this isn't working, you may need to change your printer settings to shrink to fit or scale to paper size.

How do I copy emails from Excel to Outlook?

All emails should be sent using the Bcc field.

Highlight all the email addresses you want to copy from your downloaded Excel file in one go, copy the data either by clicking the Copy button in the Home ribbon or pressing Ctrl + C keyboard, go to the email in Outlook click into the Bcc field and use Ctrl + V on the keyboard to paste the addresses in.

What is “additional information” in the Excel download?

There may be exceptional circumstances where you need to hold additional information about a member or a contact in the Portal.

The additional information will be entered onto our main database by staff on an individual basis and will be judged for suitability before doing so. This information can then be downloaded as part of the Excel download of member and contact data.

Please contact the Supporter Care Centre on 0300 500 8084 or by email at supportercare@mssociety.org.uk if you need to make use of this field.

What is “mail preferred” in the Excel download?

When individuals sign up to a contact list they are providing consent for email but can express a preference for mail. When downloading member and contact information you can filter the download so that only emailable people are included. You can also include the mail preferred field in the download so that you can filter the information yourself in Excel or similar applications.

Where possible and practical this preference for mail should be honoured when communicating with members and contacts.

How do I delete a service?

You can't delete a service, but if your group is no longer running a service then you can deactivate it so that it will no longer show on the website.

From your groups main record click on the [Group Services and Events](#) tab to see the list of activities.

Manage Groups / MSS Example / Group Services and Events

MSS Example Services

Basic Information | List of Members and Contacts | List of Volunteers | **Group Services and Events** | Risk Assessments | Properties | Vehicles | Edit

Category: Active:

Title	Category	Branch	Member
Hydrotherapy session	Exercise	MSS Example	Andy Grant
Seated Exercise class led by a Physiotherapist	Gardening class or group	MSS Example	Andy Grant
Store Collection	Other services – please specify	MSS Example	Andy Grant
Lending equipment (Strongly recommended that groups do not) Contact Andy Grant - Testing purposes only	Other services – please specify	MSS Example	Andy Grant
Information day with Creche	Advice	MSS Example	Andy Grant
Test	Information	MSS Example	portaladmin
Group Day Centre	Support groups	MSS Example	Lyndsay Smith
Pilates	Exercise	MSS Example	Lyndsay Smith
Summer Fayre	Arts, crafts, and music	MSS Example	Lyndsay Smith
Carers Information Day	Information event	MSS Example	Liat Goldfarb

Click on the name of the service that is no longer active in the **Title** column of the grid. This will take you to the Service and Event overview screen which displays key information from the record.

Click on the **Edit** tab, scroll right to the **Status** information at the bottom of the page and uncheck the Active box before clicking on **Save**.

Status

Active

If a regular service is discontinued you will need to return here and untick this box. Any service or event record that is not reviewed and saved for a period of 12 months will be automatically set to inactive. Notification messages will be sent by email 1 month prior to this.

Do members have to be on a Sublist?

No, the Sublists are there to provide an option for groups to help in knowing who wants to be contacted about particular events or interests.

Can groups define their own sublists?

Unfortunately no but the Sublists provided are those which seemed to match most groups' needs when we asked.

Do people have to be members to be included on Service Attendance Lists or Sublists?

No but the lists can only include people who are shown on the Portal with a relationship to the group as a member or a contact.

Do groups have to use Service Attendance lists?

No, they are there to provide an option which may help groups track how many people are signed up to particular events or services, or to contact them eg in case of cancellation or change of details. You can hold events without using Service Attendance lists.

How do I make sure Volunteers are included on Service Attendance Lists?

The Event's Attendance list will include everyone who could attend and doesn't filter by a person's role or membership.

My download of Attendees is missing members and/or contacts

It may be the filters applied on your download. If your attendees had "email only" as a preference and your filter is "mail only", no attendees will appear.

There's no button to add a member to an Event

Attendance can only be updated from the Event on the Portal, not from the person's record.

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 www.facebook.com/MSSociety
twitter.com/mssocietyuk

MS Society Scotland

0131 335 4050
msscotland@mssociety.org.uk

MS Society Northern Ireland

028 9080 2802
nireception@mssociety.org.uk

MS Society Cymru

mscymru@mssociety.org.uk

Multiple Sclerosis Society.
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in England and Wales 07451571.

 **Let's stop MS together**