

The title "Portal User Guide" is centered within a large, stylized orange shape that resembles a play button or a large arrow pointing to the right. The shape has a gradient from light orange to dark orange and is outlined with a thin orange line. The text is in a bold, white, sans-serif font.

## **Portal User Guide**

A block of text in a white, sans-serif font, located in the bottom left corner of the page. The text is set against a background of overlapping orange and yellow geometric shapes.

Guidance on how to access and  
edit information in the Portal

A block of text in a white, sans-serif font, located in the bottom left corner of the page. The text is set against a background of overlapping orange and yellow geometric shapes.

February 2023

A block of text in a white, sans-serif font, located in the bottom right corner of the page. The text is set against a background of overlapping orange and yellow geometric shapes.

**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 Edge, Google Chrome or Safari. It provides a range of functions for MS Society groups including:

- accessing and downloading contact and volunteer information;
- adding and maintaining information about services and events.

This guide contains detailed step-by-step instructions for various functions of the Portal. It is limited to the contact and volunteer areas of the Portal.

The Portal provides access to information about contacts and volunteers at groups. This information can be viewed on screen or downloaded in different formats.

Access to the Portal is only given after completion of our Data Protection e-learning. The information contained on the Portal is only to be used in a volunteer capacity for groups. Any information downloaded must only be kept for as long as absolutely necessary and then it must be deleted or destroyed.

Please note that since the change in Membership model, "membership" as such no longer applies. Instead, people on the Portal are Contacts and Volunteers. However, due to technical issues, it has not been possible to remove "Member" from tab headings and sublists. If you filter by "member" you will not see any of your contacts. Please bear this in mind when working through your Group contacts.

If you need to amend a Group's, Volunteer's or Contact's details, please contact the Volunteer Support Team on **0300 500 8084** or by email at **[volunteersupport@mssociety.org.uk](mailto:volunteersupport@mssociety.org.uk)**.

## In this guide

In the text, the name of a button or link will be shown **in bold orange type**.

## 2. Logging on

Go to <https://portal.mssociety.org.uk/>.

You will be prompted to login using your email and password.

### Resetting your password

If you forget your password, click on **Forgot Password?** shown under the Password box.

You will be asked for your email address. Type it in then click on **Email new password.**

Please check your junk mail folder if you have not received the email after a few minutes.

The reset link expires after 24 hours.

### 3. Group Contacts explained

When someone joins the MS Society, they can be linked to a local group based on their postcode. But they can opt-out of being linked to a group.

Groups can also choose to have a contact list that anyone who would like to hear from their group can join.

People can join the contact list of more than one group.

People join the contact list of a group through an online form. As a default they give consent for email but can express a preference for mail. Where possible and practical this preference should be honoured when communicating.

You can filter contact information so that only emailable people are included.

You can also include the mail preferred field in a download so that you can filter the information yourself in Excel or similar applications.

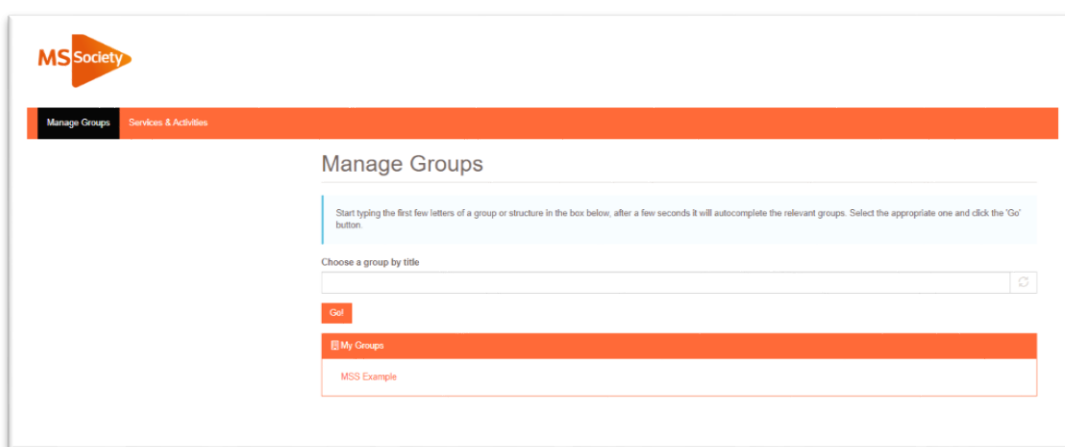
To get the contact list switched on for your group please contact **[supportercare@mssociety.org.uk](mailto:supportercare@mssociety.org.uk)**.

## 4. Contact Information

### Viewing contact data

When you login to the Portal, the **My Groups** box on the home screen shows a list of the groups you have permission to access. This is based on the volunteer roles that you hold.

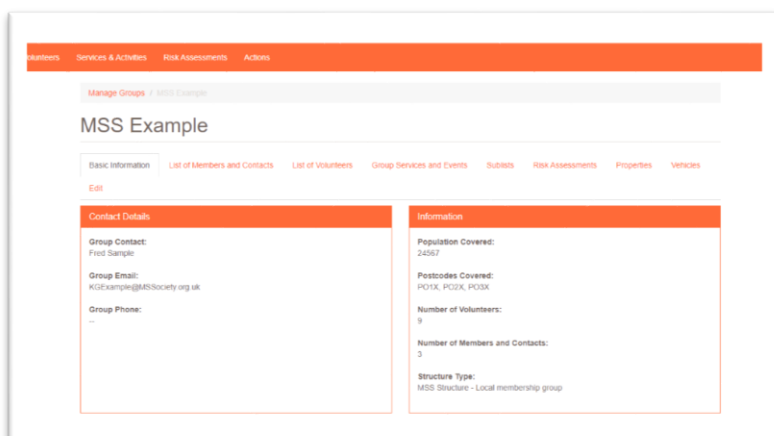
Most of the information and functions are accessed from the group record. The best way to achieve most tasks is to click the relevant group in your list to begin.



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

The group's main screen contains basic information about the group. It has a series of tabs. The tabs you see depend upon your Volunteer role(s).

To view contact information on screen, click on the **List of Members and Contacts** tab.



Now you can see some key information about the group's contacts.

Manage Groups / MSS Example / List of Members and Contacts

## MSS Example Members and Contacts

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

Edit

Below is a list of all of the active members and contacts of this structure.  
Displaying 1 - 3 of 3

Relationship to group: Members and contacts | Service attendance: N/A | Sublists: N/A

Items per page: 10

Apply

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined	On group contact list?	Sublists
Test	Contact	test@testemail.com	0123456789	0789456123			Yes	None <a href="#">View</a>
Fred	SAMPLE						Yes	None <a href="#">View</a>
TEST	Contact 2	test2@testemail.com	015275839676				Yes	None <a href="#">View</a>

Downloads:

Excel ☐ Post Labels

The list defaults to show you Members and Contacts. But you can change this by selecting the appropriate option in the **Relationship to Group** filter box. Remember that filtering by members only will not produce any results.

Relationship to group

- Members and contacts
- Members and contacts**
- Members only
- Contacts only

Apply

Items per page

- 10
- 10
- 25
- 50**

Phone

You can increase the number of records shown on screen using the **Items per page** filter.

When you've made your changes click on the **Apply** button.

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.

You can have the list display alphabetically (using either of the name columns).

The arrow next to the column indicates the ordering currently applied.

If there are still more records to display you can navigate through the pages using the page selector at the bottom of the list.

1 2 3 4 5 6 7 8 9 ... next > last »



Below are some further notes on the information found in the columns:

Column Name	Details
<b>First Name</b>	First name of the person
<b>Last Name</b>	Last name of the person or the organisation name
<b>Email</b>	Email address where known.  "No contact by email" means we have an address but the person has opted out of contact by this method.
<b>Home Phone</b>	Home phone where known.  "No contact by phone" means we have a number but the person has opted out of contact by this method.
<b>Mobile</b>	Mobile phone where known.  "No contact by mobile" means we have a number but the person has opted out of contact by this method.
<b>Membership Status</b>	Will be blank.
<b>Membership Date Joined</b>	Will be blank.
<b>On group contact list?</b>	Will show Yes or No
<b>Sublists</b>	Sublists linked to this person
<b>View</b>	Link to further information about the individual

Table 1. Contact view

## Viewing an individual contact

To view an individual contact, click the **View** link in the **List of Group Contacts** grid.

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined ▾	On group contact list?	Sublists	
Test	Contact	test@testemail.com	0123456789	0789456123			Yes	None	<a href="#">View</a>
Fred	SAMPLE						Yes	None	<a href="#">View</a>
TEST	Contact 2	test2@testemail.com	015275839676				Yes	None	<a href="#">View</a>

This will take you through to the individual view screen.

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

Services & Activities
Risk Assessments
Actions

### Test Contact

Basic Information
Roles
Skills
Interests
Training
Checklist
Additional Requirements
Group Relationships
Sublists
Service Attendance

[Edit Account](#)

Manage display

#### Address

372 Edgware Road  
LONDON  
England  
NW2 6ND

#### Email & Phone

Home Phone:  
0123456789

Mobile Phone:  
0789456123

Email:  
test@testemail.com

#### Membership Information

Constituent ID:  
1033142

Group:  
--

Date Joined:

Status:  
--

Date Renewed:

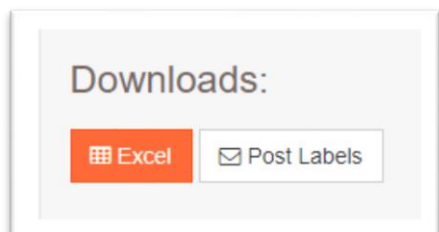
#### Emergency Contact

Emergency Phone:  
--

Emergency Contact:  
--

## 5. Downloading Contact Data

At the bottom of the **List of Group Contacts** screen are two buttons that allow you to download contact information.



The **Excel** option allows you to download a range of fields about the group contacts as a password protected Excel file. You then use this information to send emails or create your own mail merges.

The **Post Labels** option allows you to download a PDF of 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 contact data – Excel

Clicking on the **Excel** option in the **List of Group Contacts** screen will open the Members and Contacts Download page.

There are options that control who 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. At the top is a breadcrumb trail: 'Manage Groups / MSS Example / Members and Contacts Download'. The main heading is 'Members and Contacts Download'. Below this is a light blue box with the instruction: 'Please tick the boxes for the columns to include in this download.' The page is divided into two columns. The left column has two sections: 'Records to download' with three radio button options ('Download members and contacts' is selected), 'Download members only', and 'Download contacts only'; and 'Filter by email?' with two radio button options ('Include all' is selected) and 'Only include people we can email'. The right column has two dropdown menus: 'Service attendance' and 'Sublists', both currently set to 'N/A'.

The **Records to download** option allows you to select between all

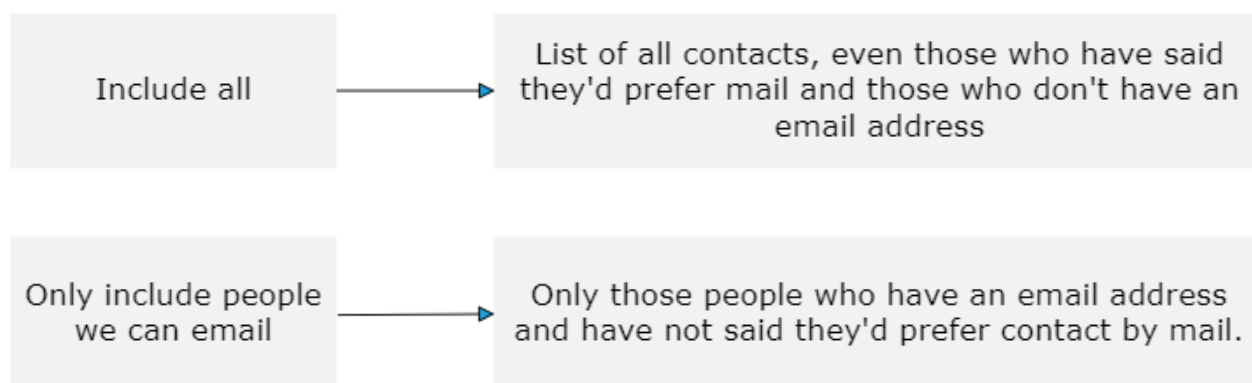
- Group Contacts,
- members only,
- or contacts only.

Note that since the change in membership model in 2021, you can only download people who have agreed to be contacted. If they are not on the Portal, even if you know that they are part of the group, they should not be contacted.

Members only will not give you any results – there are no longer any “members”.

The **Filter by email?** option allows you to choose to only download people we can email.

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 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.

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 anyone with volunteer roles. The Volunteer tab is itself a filter that shows only those with volunteer 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 need to enter a reason why you are downloading the data.

You will also need a password for the file. You need to remember this password as you won't be able to open your downloaded file without it.

The password should not be the same as your login password. You should use a new password for each downloaded file.

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 then 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.

Depending on your computer, the downloaded file may open straight away or it will be saved to your downloads folder.

## Downloading contact data – Post Labels

Clicking on the **Post Labels** option in the **List of Group Contacts** screen will open the Labels Download page.

This page generates 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.

**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 format of the label rows is shown as an example on the page, but actually downloads as a centred address in the label.

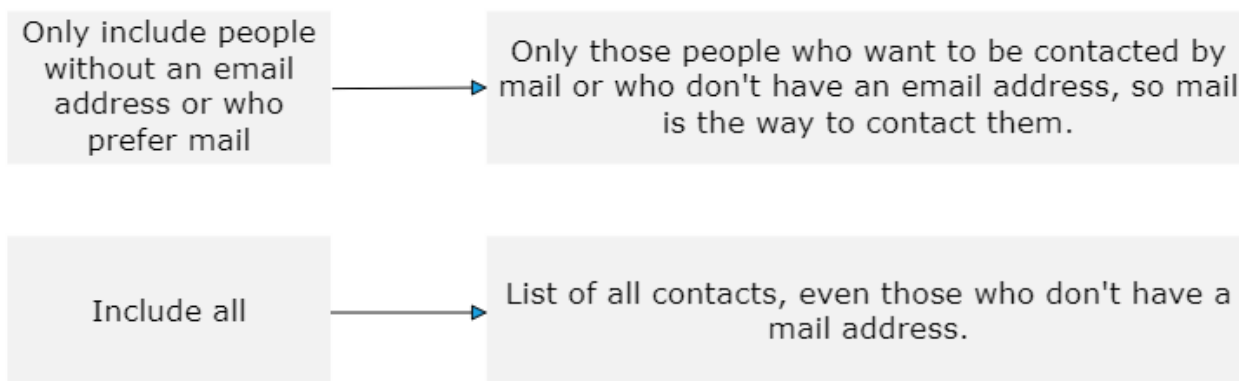
Mr A N Example  
372 Edgware Road  
Cricklewood  
London  
NW2 6ND

The **Records to download** option allows you to select between

- all Group Contacts,
- members only
- or contacts only.

As mentioned in the Excel download section, you can only download contacts even if you select the “members only” option.

The **Filter by email?** option allows you to only download people we can email. 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 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.

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 anyone with volunteer roles. The Volunteer tab is itself a filter that shows only people with roles within the group.

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

You will 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 should not 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.

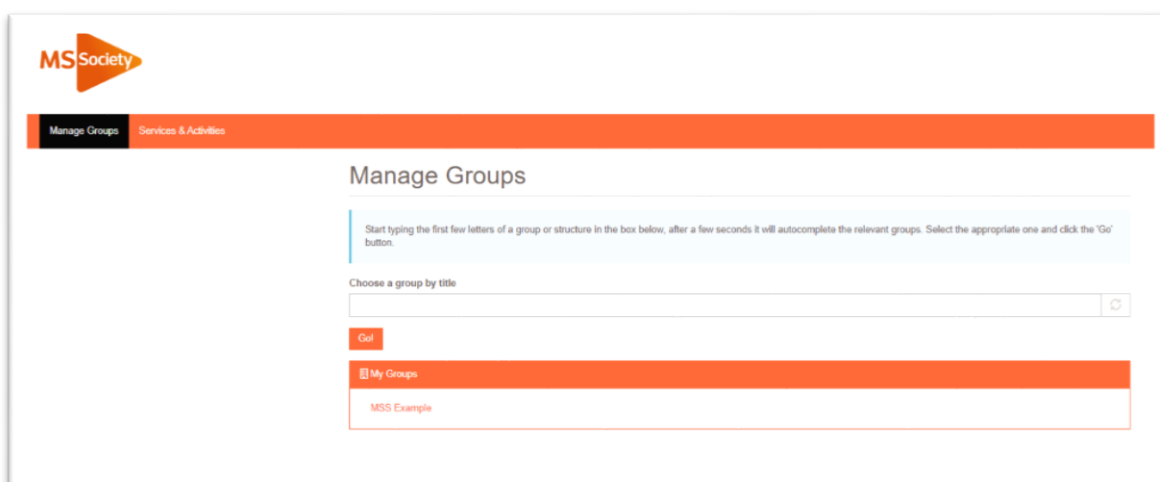
## 6. Volunteer Information

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

### Viewing volunteer data

When you login to the Portal, the **My Groups** box on the home screen shows a list of the groups you have permission to access. This is based on the volunteer roles that you hold.

Most of the information and functions are accessed from the group record. The best way to achieve most tasks is to click the relevant group in your list to begin.



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

The group's main screen contains basic information about the group. It has a series of tabs. The tabs you see depend upon your Volunteer role(s).

To view group 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	<a href="#">View</a>

On this screen you can view key contact information about the group's 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	<a href="#">View</a>

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 see 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:  
1016574

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

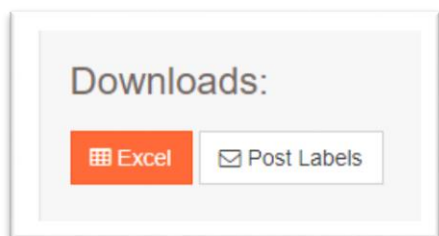
### Roles

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.

## 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 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 should not 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:

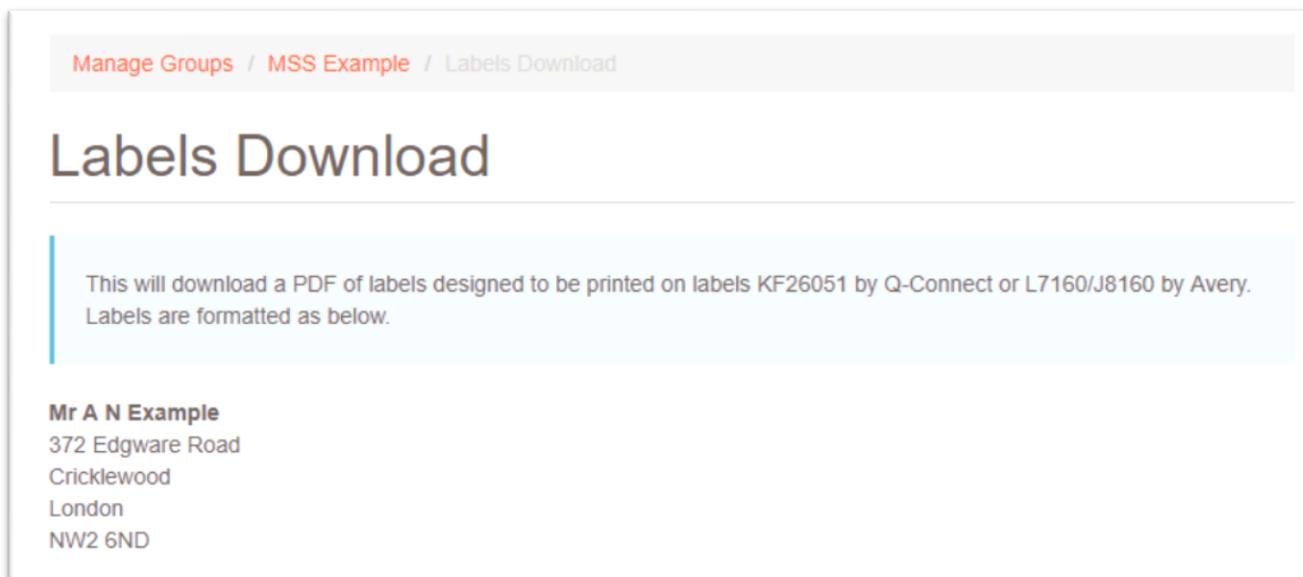
- Always keeping the information encrypted with a password if stored on a computer
- Not sharing, swapping or selling the information with 3rd parties outside the group
- Only sharing with authorised committee members within the group
- Deleting any previous or out of date versions of the information.
- 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.



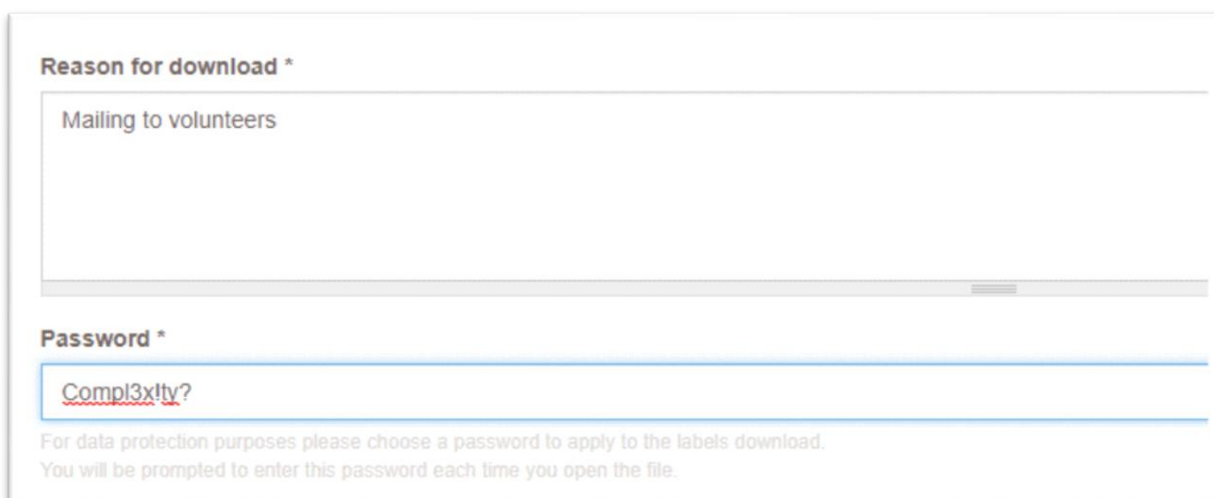
Manage Groups / MSS Example / Labels Download

## 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 should not 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 \***

Compl3x!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. Events and Services

Volunteers with certain roles will be able to see the Group Services and Events tab for their Group.

### Adding Events and Services

This short (10 minute) video describes how to add a new Event or Service for your Group - <https://www.youtube.com/watch?v=RgNaWcypMMI>

### Adding documents to Events and Services

Here's another short video (4 minutes) showing how to edit the Event or Service and add documents to it - <https://www.youtube.com/watch?v=rlKBSijsmnQ>

### The Event or Service does not appear on the MS Society website

If the postcode is incorrect the service is set to inactive and so ignored.

If the service main category has a value of "other services" then the service is set to inactive and ignored.

If the service main category is set to "group volunteer meeting" then the service is set to inactive and ignored.

If the service Subcategory has a value of "bucket collections" then the service is set to inactive and ignored.

## 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.

### MSS Example Services

[Basic Information](#)
[List of Members and Contacts](#)
[List of Volunteers](#)
[Group Services and Events](#)
[Sublists](#)
[Risk Assessment](#)

[Edit](#)

Category

- Any -

Active

On

Add New Service

Reset

Title	Category	Group	M
Coffee and chat	Socials events	MSS Example	A
Physiotherapy service	Physiotherapy treatment	MSS Example	Tr
Steph one more test	Arts, crafts, and music	MSS Example	S
steph bau test event	Exercise	MSS Example	S
<script>alert(document.cookie)</script>	Fundraising	MSS Example	S
Test course event	Beauty therapies	MSS Example	S
Test on demand event	Advice	MSS Example	S
Test event for Seb	Arts, crafts, and music	MSS Example	S
Module 3 testing checks	Group volunteer meeting	MSS Example	A
Advisory group example	Group volunteer meeting	MSS Example	A

1

2

3

4

5

6

7

8

9

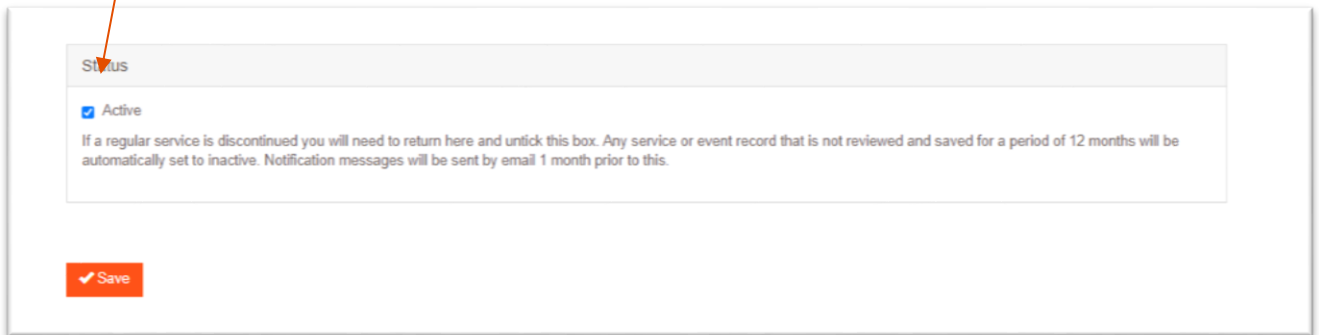
...

next >

last »

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**.



The screenshot shows a user interface for managing a service. At the top, there is a tab labeled "Status". Below the tab, there is a section titled "Active" with a checked checkbox. A note below the checkbox states: "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." At the bottom of the form, there is a red button labeled "Save" with a checkmark icon.

## 9. Service Attendance Lists

Service Attendance Lists help you keep track of who attends a regular service or event, or has signed up for a one-off event.

You can generate lists for contacting attendees 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.

Title	Category
<a href="#">Coffee Morning</a>	Socials events
<a href="#">Weekly social event "Drop-In"</a>	Socials and support groups
<a href="#">Mat Pilates for people with MS Face to Face</a>	Strengthening and co-ordination
<a href="#">Virtual Exercise Classes</a>	Exercise
<a href="#">Seated Zumba Gold face to face</a>	Strengthening and co-ordination
<a href="#">Social</a>	Socials events
<a href="#">Social</a>	Socials events
<a href="#">Social</a>	Socials events
<a href="#">Benefits Advice Service</a>	Other advice partnership

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


Coffee and chat

View
Edit
Attendance


Basic Information

Group: [MSD Example](#)  
Type: Regular Event/Service  
Category: Socials events  
Description: A coffee and chat group that meets the first and third Wednesday of each month between March and October

Where and When

Frequency: Every 2 weeks  
Regular Time: 11am  
Address: Greenwood Cafe  
Station Road  
Coalbrookdale, Telford  
Shropshire  
TF9 1DR  
  
Additional Notes:

Further Information

Delivered By: Volunteers  
Target Audience: Everyone  
Funding: The service is fully funded by charging the individuals attending  
Price: £3  
Transport options available: No  
Transport Options: Other ways to access this service: None  
Active: Yes  
Attached Files:  A regular coffees morning at Greenwood cafe HDV 821.docx

Staff Only

Expected no. of different annual attendees: 85  
Average Attendance:  
Current attendance: 0  
Risk Evaluation: Low Risk according to below:  
Complaint Person: Yes  
External Parties: No  
Personal Care: No

If you cannot see the **Attendance** tab, your volunteer role does not give you permission to update the Attendance List.

You will see a list of the contacts for the group (listed alphabetically by surname) and whether they are an attendee of the service/event.

Display some or all of the contacts by changing the **Items per page** filter and clicking **Apply**.

## Coffee and chat : Attendance

[View](#)
[Edit](#)
[Attendance](#)

### Service Attendance

Below is a list of all of the active members and contacts of this structure.  
Displaying 1 - 3 of 3

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?	
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
TEST	Contact 2	test2@testemail.com	No	<input type="checkbox"/>
Fred	SAMPLE		No	<input type="checkbox"/>

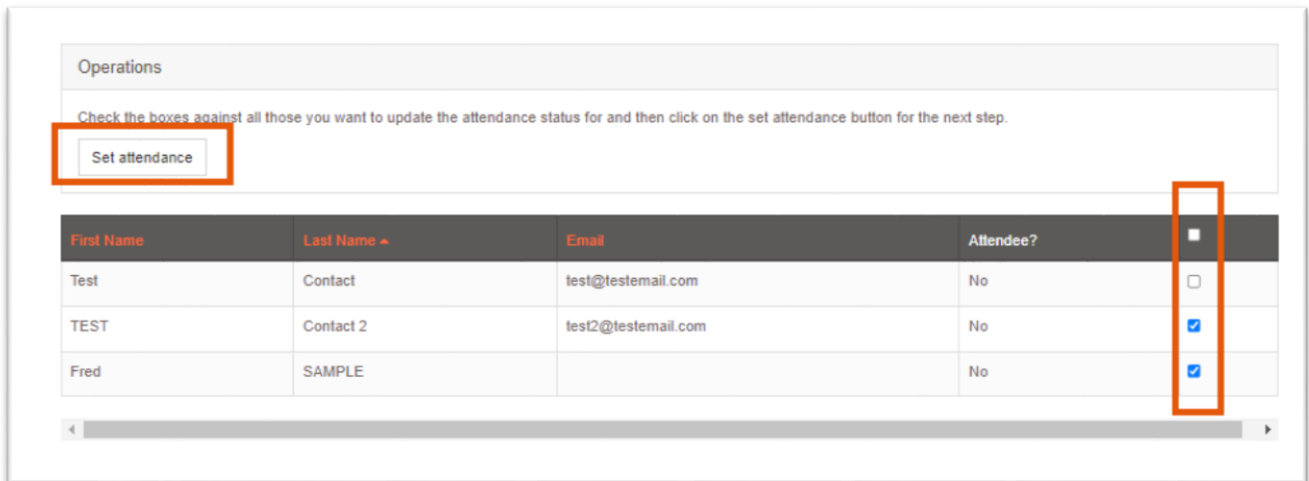
You can update one, several or all of the attendee records by clicking in the boxes to the right of the names (the box in the black title bar will select **all** on the page).

Attendee?	
No	<input type="checkbox"/>
No	<input type="checkbox"/>
No	<input type="checkbox"/>

You set attendance to **Yes** or **No** in separate steps.

## To add Attendees

Select the people you want to mark as Yes, clicking in the individual boxes next to their name, then click on the **Set Attendance** button



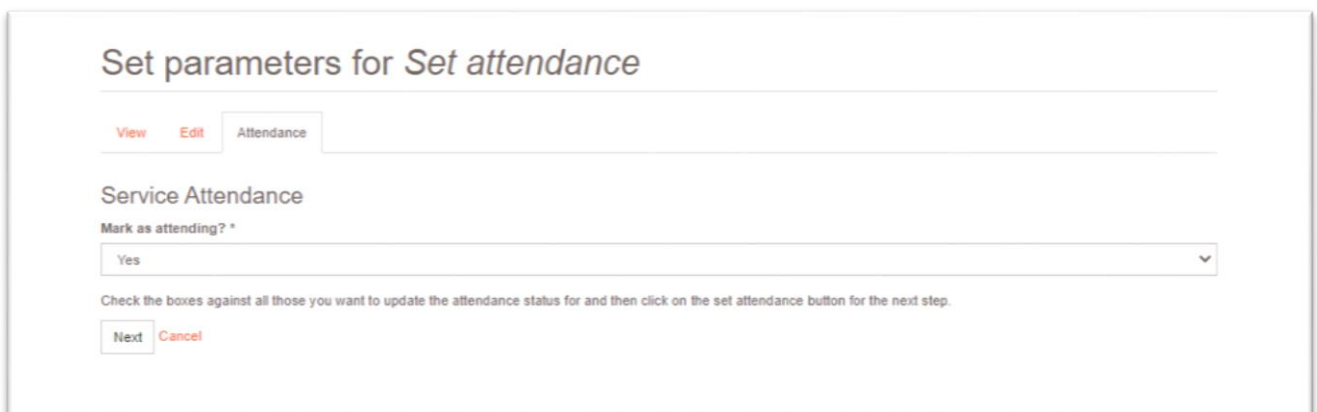
Operations

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?	
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
TEST	Contact 2	test2@testemail.com	No	<input checked="" type="checkbox"/>
Fred	SAMPLE		No	<input checked="" type="checkbox"/>

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



Set parameters for *Set attendance*

View Edit Attendance

Service Attendance

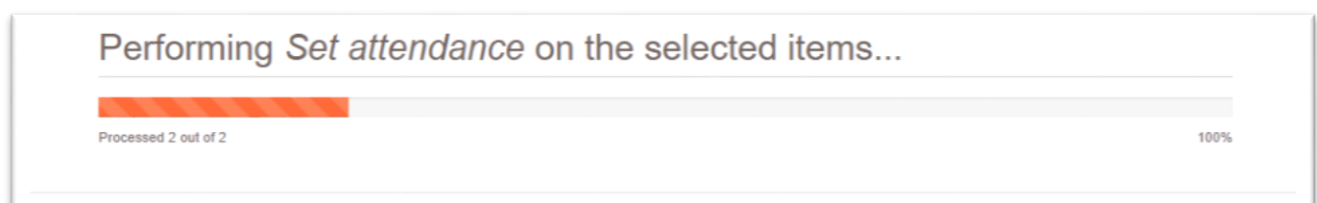
Mark as attending? \*

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

You'll see a progress bar ...



Performing *Set attendance* on the selected items...

Processed 2 out of 2 100%

... then a confirmation message and the attendance status will have updated.

### Coffee and chat : Attendance

- Set TEST Contact 2 as attending Coffee and chat
- Set Fred SAMPLE as attending Coffee and chat
- Performed Set attendance on 2 items.

[View](#)
[Edit](#)
[Attendance](#)

#### Service Attendance

Below is a list of all of the active members and contacts of this structure.  
Displaying 1 - 3 of 3

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?	
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
TEST	Contact 2	test2@testemail.com	Yes	<input type="checkbox"/>
Fred	SAMPLE		Yes	<input type="checkbox"/>

## To remove Attendees

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

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?	
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
TEST	Contact 2	test2@testemail.com	Yes	<input checked="" type="checkbox"/>
Fred	SAMPLE		Yes	<input 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 ...

Performing *Set attendance* on the selected items...

Processed 2 out of 2

100%

... then a confirmation message and the attendance status will have updated.



### Coffee and chat : Attendance

- Set TEST Contact 2 as not attending Coffee and chat.
- Performed Set attendance on 1 item.

View Edit Attendance

#### Service Attendance

Below is a list of all of the active members and contacts of this structure.  
Displaying 1 - 3 of 3

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?	
Test	Contact	test@testemail.com	No	<input type="checkbox"/>
TEST	Contact 2	test2@testemail.com	No	<input type="checkbox"/>
Fred	SAMPLE		Yes	<input type="checkbox"/>

Once you've added all of your attendees, you can view them as a list on the main Group Contacts page for your group. Change the **Service Attendance** filter to show the event and click **Apply**.

manage Groups / MSS Example

### MSS Example Members and Contacts

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 members and contacts of this structure.  
Displaying 1 - 10 of 14

Relationship to group  
Members and contacts

Service attendance  
CHRISTMAS LUNCH

Sublists  
N/A

Items per page  
10

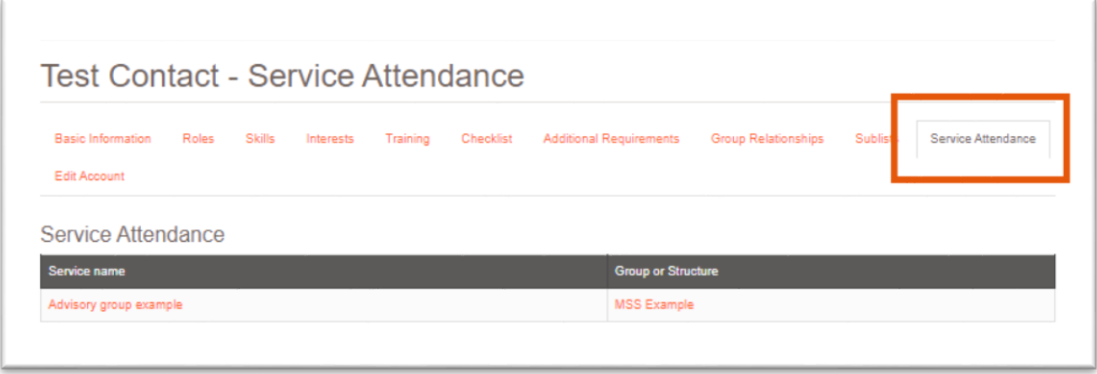
Apply

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

**Section 8** gives information on downloading a list of attendees for your event or service.

## Viewing which services/events someone is attending

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



Test Contact - Service Attendance	
Basic Information Roles Skills Interests Training Checklist Additional Requirements Group Relationships Sublist <b>Service Attendance</b>	
Edit Account	
Service Attendance	
Service name	Group or Structure
Advisory group example	MSS Example

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.

## 10. Communications Sublists

Sublists can be used where contacts have given preferences on the type of things they'd like to hear about from the group. They are there 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's a breadcrumb 'Manage Groups / MSS Example'. Below the group name, there's a navigation bar with tabs: 'Basic Information' (selected), 'List of Members and Contacts', 'List of Volunteers', 'Group Services and Events', 'Sublists', 'Risk Assessments', 'Properties', and 'Vehicles'. An 'Edit' link is visible below the tabs. The main content area is divided into two columns. The left column, titled 'Contact Details', contains: 'Group Contact: Fred Sample', 'Group Email: KGExample@MSSociety.org.uk', and 'Group Phone: --'. The right column, titled 'Information', contains: 'Population Covered: 24567', 'Postcodes Covered: P01X, P02X, P03X', 'Number of Volunteers: 9', 'Number of Members and Contacts: 3', and 'Structure Type: MSS Structure - Local membership group'.

This tab shows the sublists available. Groups cannot create their own sublists.

The screenshot shows the 'MSS Example Sublists' page. It has a navigation bar with tabs: 'Basic Information', 'List of Members and Contacts', 'List of Volunteers', 'Group Services and Events', 'Sublists' (selected), 'Properties', and 'Vehicles'. Below the tabs is a table with the following data:

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 someone 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. **On list?** will update to show you if they are on the list or not.

Fred SAMPLE - Sublist Memberships		
<a href="#">Basic Information</a> <a href="#">Roles</a> <a href="#">Skills</a> <a href="#">Interests</a> <a href="#">Training</a> <a href="#">Checklist</a> <a href="#">Additional Requirements</a> <a href="#">Group Relationships</a> <a href="#">Sublists</a> <a href="#">Service Attendance</a>		
<a href="#">Edit Account</a>		
MSS Example		
Title	On list?	Edit
Draw tickets	No	<a href="#">Add</a> <a href="#">Remove</a>
Flag/supermarket collections	No	<a href="#">Add</a> <a href="#">Remove</a>
Interested in events	No	<a href="#">Add</a> <a href="#">Remove</a>
Interested in fundraising	No	<a href="#">Add</a> <a href="#">Remove</a>
Interested in fundraising events	No	<a href="#">Add</a> <a href="#">Remove</a>
Interested in volunteering at fundraising events	No	<a href="#">Add</a> <a href="#">Remove</a>
Interested in services	No	<a href="#">Add</a> <a href="#">Remove</a>
Newsletters by email	No	<a href="#">Add</a> <a href="#">Remove</a>
Newsletters by post	No	<a href="#">Add</a> <a href="#">Remove</a>
Transport	No	<a href="#">Add</a> <a href="#">Remove</a>

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

## Fred SAMPLE - Sublist Memberships

Added Fred SAMPLE as a member of Newsletters by email at MSS Example

Basic Information Roles Skills Interests Training Checklist Additional Requirements Group Relationships Sublists Service Attendance

Edit Account

### MSS Example

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

To update another person's sublists, go to the **Manage Groups** link then to your group link. Don't use the back button as you may undo your current selections.

MS Society

Manage Groups Services & Activities

## Manage Groups

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

Go

My Groups

MSS Example

You will be able to see all the lists that a person has signed up to on the group's List of Group Contacts page

### MSS Example Members and Contacts

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

Edit

Below is a list of all of the active members and contacts of this structure.  
Displaying 1 - 3 of 3

Relationship to group: Members and contacts Service attendance: N/A Sublists: N/A

Items per page: 10

Apply

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined	On group contact list?	Sublists	
Test	Contact	test@testemail.com	0123456789	0789456123			Yes	None	<a href="#">View</a>
Fred	SAMPLE						Yes	<b>Newsletters by email</b>	<a href="#">View</a>
TEST	Contact 2	test2@testemail.com	015275839676				Yes	None	<a href="#">View</a>

## Sending communications to people on a sublist

If you want to send communications to people on a sublist or attendance list, follow the instructions in section 5 above, using the filters to select the people you want to contact.

### Labels Download

This will download a PDF of labels designed to be printed on labels KF26051 by Q-Connect or L7160J8160 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

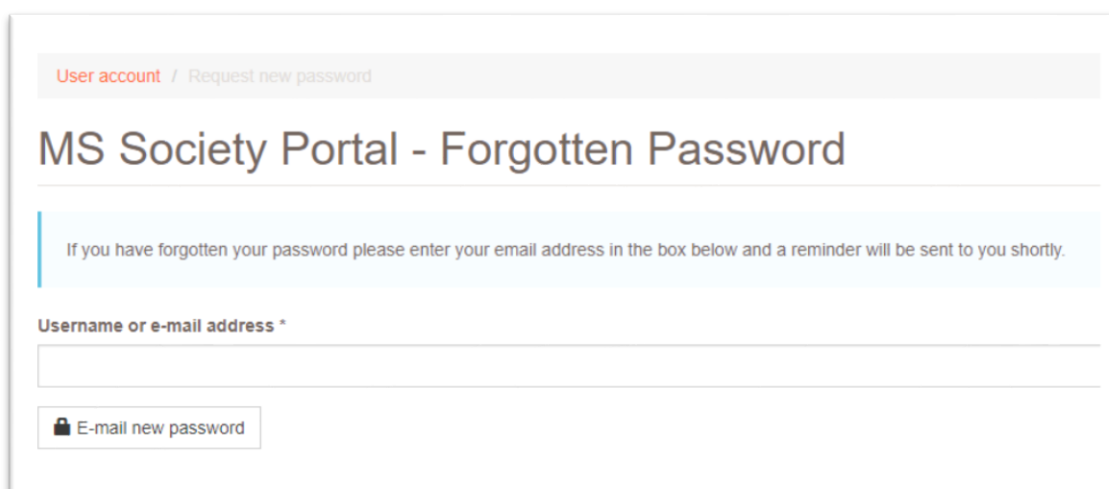
Sublists: N/A

## 11. 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 be prompted to enter your email address to receive a reset link.



The screenshot shows a web page 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 text: "If you have forgotten your password please enter your email address in the box below and a reminder will be sent to you shortly." Underneath this box, there is a label "Username or e-mail address \*" followed by a text input field. At the bottom of the form, there 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 Volunteer Support Team on **0300 500 8084** or by email at **volunteersupport@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 Volunteer Support Team on **0300 500 8084** or by email at **volunteersupport@mssociety.org.uk** with the details of the volunteer who needs access to get them set up.

## What does “On group contact list?” mean?

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. 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 **supportercare@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 contact of another group 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?

There is no longer a "membership" option, although these fields remain on the Portal.

## How do I correct volunteer role information?

Contact the Volunteer Support Team on **0300 500 8084** or by email at **[volunteersupport@mssociety.org.uk](mailto:volunteersupport@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.

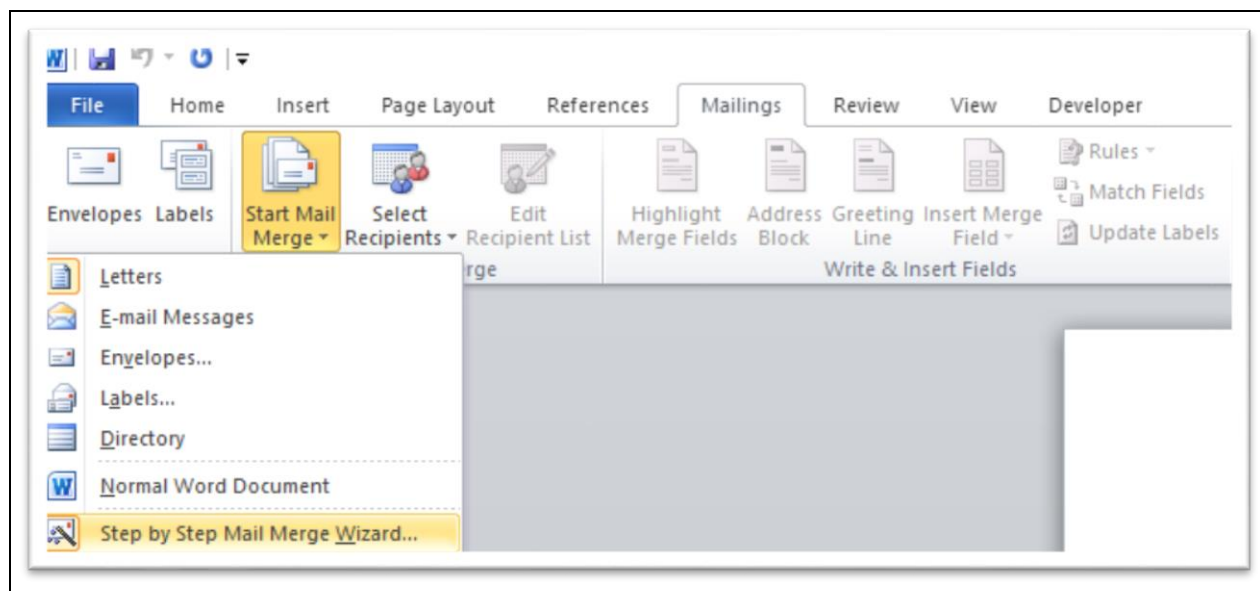
## I am having trouble downloading lists/labels

Refer to Section 5 (Downloading Contact Data) or Section 7 (Download Volunteer Data) for more information on how to download Excel lists and Post Labels.

Please note that downloads can take up to 30 seconds and that different browsers (Edge, 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.

In the paper size choose **A4**

In the '**Scale**' option choose **Fit to printable area**

## 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 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 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 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 contacts.

## Do contacts 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 contacts 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 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, for example, 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 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 contact 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](http://mssociety.org.uk)



## **Contact us**

MS National Centre 020 8438 0700  
[info@mssociety.org.uk](mailto:info@mssociety.org.uk)

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

### **Online**

[mssociety.org.uk](http://mssociety.org.uk) [www.facebook.com/MSSociety](http://www.facebook.com/MSSociety)  
[twitter.com/mssocietyuk](https://twitter.com/mssocietyuk)

### **MS Society Scotland**

0131 335 4050  
[msscotland@mssociety.org.uk](mailto:msscotland@mssociety.org.uk)

### **MS Society Northern Ireland**

028 9080 2802  
[nireception@mssociety.org.uk](mailto:nireception@mssociety.org.uk)

### **MS Society Cymru**

[mscymru@mssociety.org.uk](mailto:mscymru@mssociety.org.uk)

Multiple Sclerosis Society.  
Registered charity nos. 1139257 / SC041990.  
Registered as a limited company by guarantee  
in England and Wales 07451571.

 **Let's stop MS together**