

## Branch and Group Menus

On the Volunteer Portal, there are four different menus in the drop-down which will provide the nominated people in the Branch or Group with the information previously provided through the information exchange

- People You Can Update
- Branch/Group Connections
- Branch/Group Members
- Contact Permissions

Each of the different menu options displays specific data relating to the Branch/Group Connections

### People you can update

The first of the four menus are People You Can Update. This page will give a list of all the people in the branch/group who can have their records update directly. To do so, click the arrow on the line of the person you would like to edit

| Full Name ↑ | ID     | Email                  | Mobile Phone | Deceased Notification Date | Deceased Notification Source | Place of Death | Portal Managed |
|-------------|--------|------------------------|--------------|----------------------------|------------------------------|----------------|----------------|
| Erin Smart  | 500074 | katie.a.lees@gmail.com | 07867332752  |                            |                              |                | Yes            |

Then click Edit, to enter an editable version of the form as shown below

**Edit**

ID: 1401225

**First Name**: Gregory

**Last Name \***: Craig

**Known As**: Greg

**Date of Birth**: 07/10/1972

**Street 1**: 3 Strand Close

**Street 2**:

**Street 3**:

**Street 4**:

**Street 5**:

**City**: MABLETHORPE

**County**: Lincolnshire

**Postal Code**: LN12 1BE

**Country**: United Kingdom

**Mobile Phone**:

**Home Phone**:

**E-mail**: gregorycraig@testemail.com

**Job Title**:

**Website**:

**Facebook**:

**Twitter**:

**Gender**: Male

**Marital Status**:

**Ethnicity Type**:

**Deceased**:  No  Yes

**Deceased Date**:

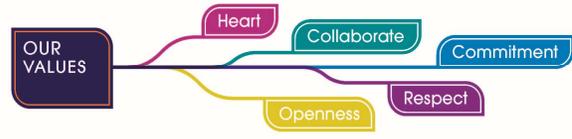
**Deceased Notification Date**:

**Deceased Notification Source**:

**Place of Death**:

**Preferred Language**:

As well as updating contact details, you can also use this method to send deceased notifications



**Ethnicity Type**

**Deceased**

No  Yes

**Deceased Date**

**Deceased Notification Date**

**Deceased Notification Source**

**Place of Death**

To notify that a contact has died, the user should change deceased from no to yes and then continue to complete the fields to indicate the notification date and source, and the date and place of death as far as reasonably possible. To save any changes, click submit

**Branch/Group Connections**

The next form on the list is Branch/Group Connections. This page gives a much more detailed insight into the people who are connected to the branch or group, and gives users the ability to break the information down further

Home > View people connected to your Branch/Group

View people connected to your Branch/Group

Additional filter by Constituent Code

PwMND

Carer

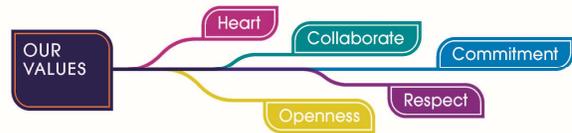
Volunteer

[Apply](#)

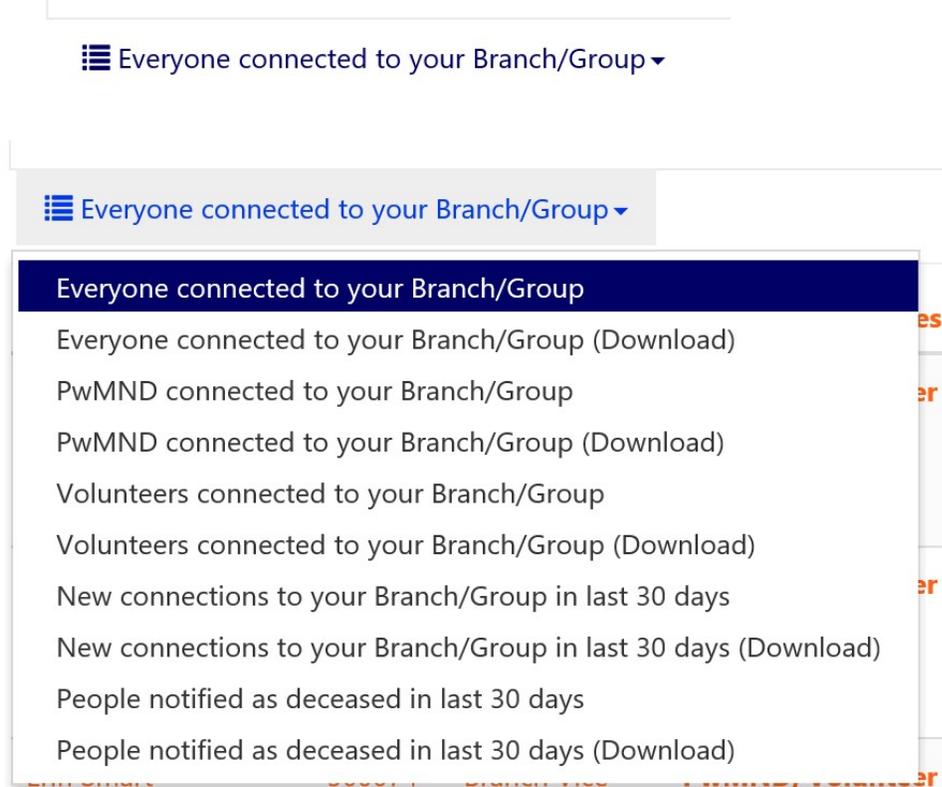
☰ Everyone connected to your Branch/Group ▾

[Download](#)

| Contact           | ID      | Branch Role      | Constituent Codes | Address   | Email                          | Home Phone |
|-------------------|---------|------------------|-------------------|---|--------------------------------|------------|
| Anne-Marie Bolton | 1401226 | Branch Chair     | Volunteer         | 171 Rockingham Road CORBY NN17 2AA United Kingdom               | anne.bolton@testemail.com      |            |
| Charlotte Bolton  | 1401232 | Branch Secretary | Volunteer         | 3 Edison Drive Upton NORTHAMPTON NN5 4AB United Kingdom         | charlotte.bolton@testemail.com |            |
| Chrissy Williams  | 1401233 | B/G Member       | Carer             | 4 Dallington Close Geddington KETTERING NN14 1AB United Kingdom | chrissy.williams@testemail.com |            |



There are several ways to filter, one of which is using the drop-down list



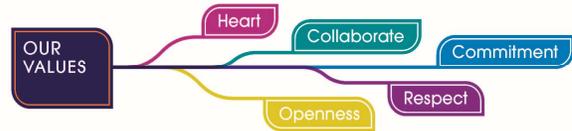
This gives you the ability to break down the information in to predefined categories when looking for specific information

You can download the lists in to an excel format by clicking Download on the right-hand side. However, this should only be done when necessary and should be kept securely or deleted if no longer required

To break the list down even further, there is also the option to filter by Constituent Code on the left-hand side



This means you can break down lists to various groups of people or just one specific group



## Branch / Group Members

Here you will find a list of all the connections to the group who are Association Members. The list will give information such as Membership Category and Membership Expiry dates

Home > View members connected to your Branch/Group

## View members connected to your Branch/Group

Additional filter by Constituent Code

PwMND

Carer

Volunteer

Apply

| ID      | Contact       | Membership Category ↑ | Expiry Date | Constituent Codes | Address   | Email                       | Home Phone  |
|---------|---------------|-----------------------|-------------|-------------------|---|-----------------------------|-------------|
| 1401093 | Martha Bolton | Volunteer             |             | Volunteer         | Flat 3 9 Notre Dame Mews<br>NORTHAMPTON<br>NN1 2BG United Kingdom | martha.bolton@testemail.com | 01226245811 |

## Contact Permissions

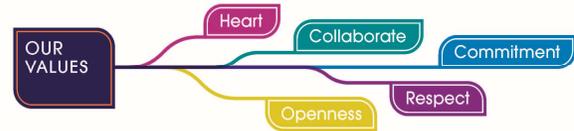
The last option on the list is Contact Permissions. This list gives you the ability to find the people you can contact, and filter by specific types of contact / contact reason.

People you can mail with service updates ▾

**People you can mail with service updates**

- People you can mail with service updates (download)
- People you can email with service updates
- People you can email with service updates (download)
- People you can mail with requests and newsletters
- People you can mail with requests and newsletters (download)
- People you can email with requests and newsletters
- People you can email with requests and newsletters (downloads)
- Consent Permissions Updated Last 30 Days
- Consent Permissions Updated Last 30 Days (downloads)

So, for example, when sending a newsletter out by post, users should check the list 'People you can mail with requests and newsletters' It is important to always check this list before making contact, as the permissions could change.



Constituency Code

- PwMND
- Carer
- Volunteer

In addition, users can also filter this further by searching by constituency code (on the left-hand side). This is useful when looking to contact a specific group. So, if users needed to run a report to show the volunteers who have consented to service updates by mail, they can choose the consent type from the drop-down and then tick the box to search by the constituency code volunteer

This list can also be downloaded, and as noted above this is the list which should be referred to when making contact, to ensure the contact permissions are adhered to

The main benefit of these lists in comparison to the monthly information exchange, is that the lists update regularly based on the migration of data between the Volunteer Portal and MrC. This means the information will be much more up to date and relevant