

BRAND PARTNER PORTAL

Getting Started on the Brand Partner Portal.



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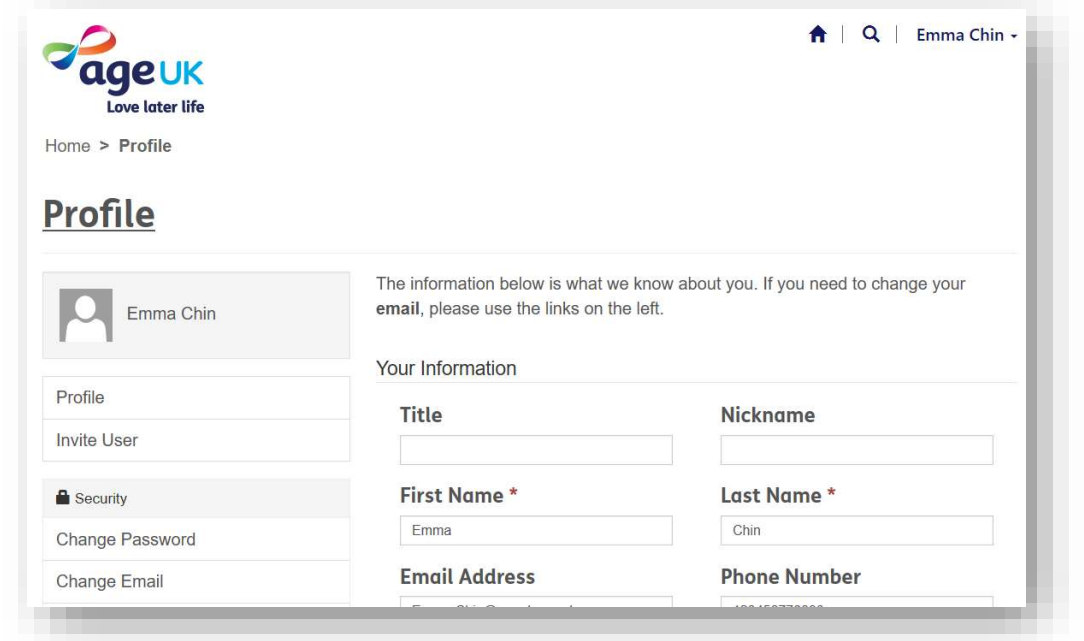
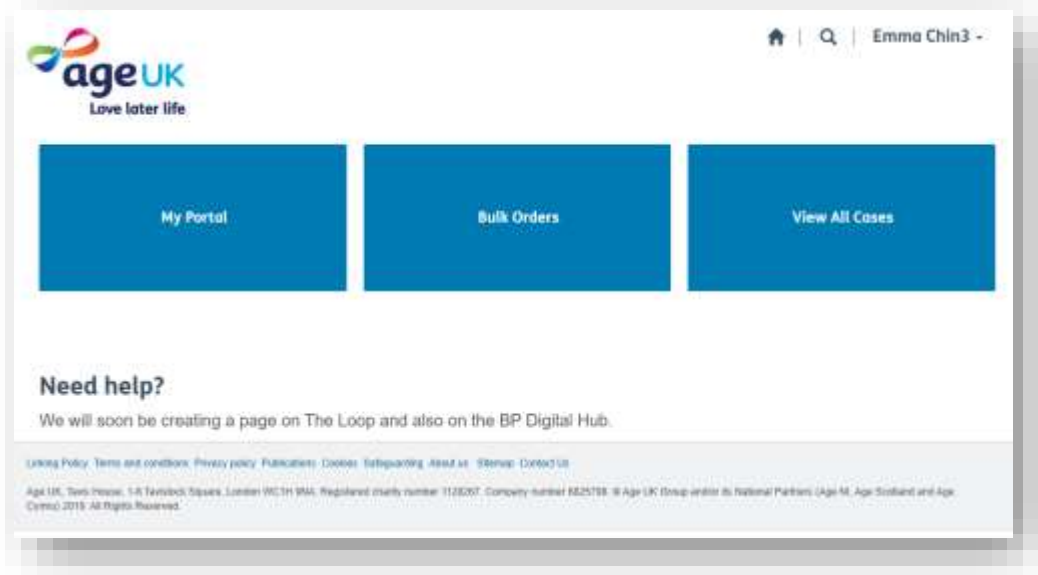
INTRODUCTION.



WHAT IS THE BRAND PARTNER PORTAL?

The portal will allow local brand partners to manage the information they share with Age UK National, to be used either in Age UK's Local Directory or by the National Advice Line.

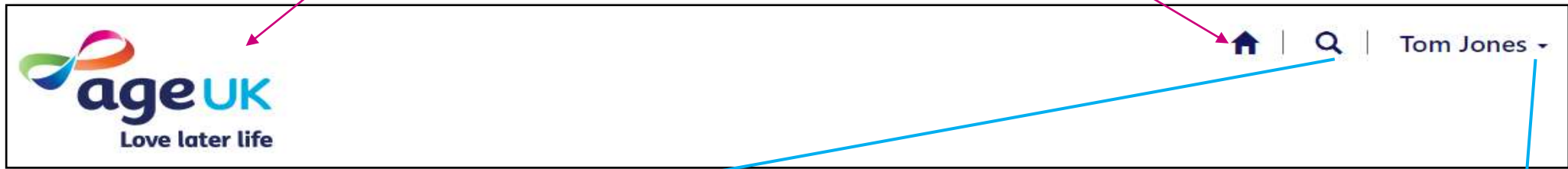
Once logged in, you'll either land on the main home page (left) or your personal portal profile page (right).



Whichever page you're on, there are several buttons and links throughout the portal that are designed to help you navigate around the system.

NAVIGATION HEADER

The header contains the **Age UK logo** as well as a '**Home**' icon. Clicking on either of these will direct you to the portal home page.



By clicking on the magnifying glass, a search bar will appear. From here you can search for records within the portal using one of the following identifiers:

- Record ID number (e.g. a case reference number for enquires escalated by the Advice Line).
- Record name (e.g. organisation name, location name, shop name, etc..).

Also by clicking on the triangle icon next to user's name will present you with two options:

- View Profile
- Sign Out.

NAVIGATION TILES

The navigation tiles will direct you to specific areas within the portal.



This area allows you to view and manage your organisation details, create and manage records for the Age UK local directory and National Advice Line. These records reflect the:

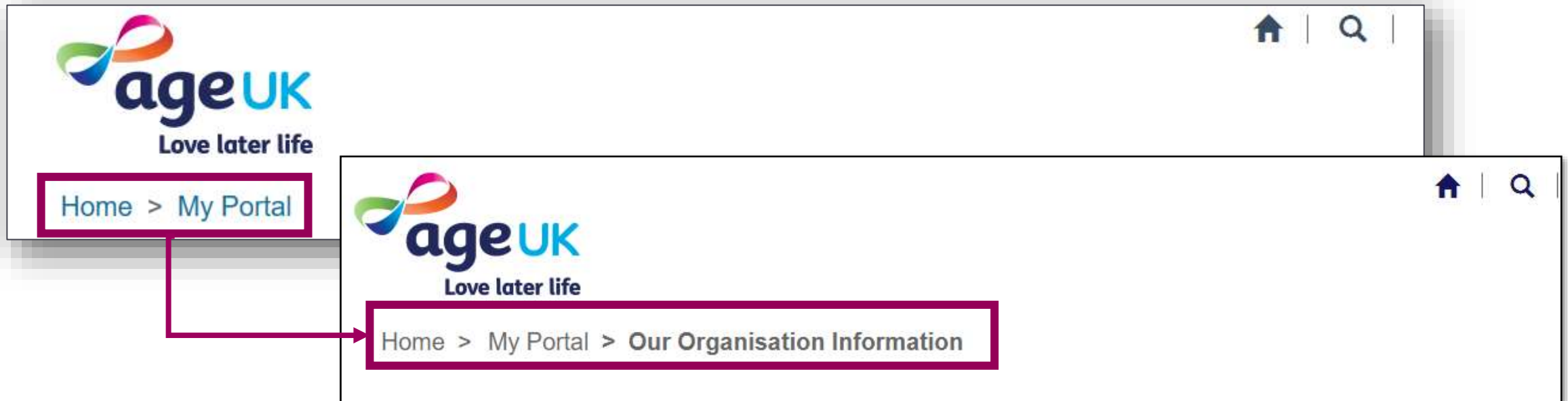
- Locations you manage or use as venues.
- Services you deliver.
- Events and activities.
- Community Signposts.
- Shops you manage.

This area is still being developed, to allow you to order I&A resources in bulk.

This area of the portal is for organisations that are part of the Integration service, with the National Advice Line. Here, you'll be able to see and responded to enquires that have been escalated to your organisation.

PORTAL BREADCRUMB

In web applications, the term “**breadcrumb**” describes the hierarchical series of hyperlinks shown at the top of a web page. Once you’ve made a selection from the [Navigation Tile](#), the breadcrumb will appear underneath the Age UK logo so show you where you are in the system



As you move through the system, more breadcrumbs will be added. You can use this as a navigation aid; by presses any of the links, the system will route you back to that area.

FIRST TIME REGISTRATION FOR THE PORTAL.

The following pages will explain the different parts of the registration process for the portal.



PORTAL USER PROFILE.

Each staff member and volunteer who needs to access the portal must have a unique username and password.

Portal user profiles for your organisation will be set up in two ways:

- 1) Age UK National will create an account for one individual nominated to be the Primary Portal User. We will create their profile and send them a username and temporary password.
 - i. This person could be (but is not limited to) your CEO, IT lead, or I&A Manager.
- 2) The Primary Portal User will have the security rights to invite additional members from your organisation to access the portal (if needed).

Username	<ul style="list-style-type: none">• This will be your individual work email address.
Password	<ul style="list-style-type: none">• Accounts created by Age UK National will be given a temporary password, which must be changed once they've logged into the portal (see <i>How to change your portal password for more information</i>).• Accounts created within the portal will receive an invitation email with a link to the portal. Once you have opened the link, the system will validate the unique invitation code contained within the link, and from there, you will be asked to create a password for your account.

If you have any further questions about this process, please send an email to portalaccess@ageuk.org.uk

HOW TO ACCESS THE BRAND PARTNER PORTAL.

The Dynamics Portal App is supported by the latest version of the following web browsers.

Chrome



Firefox



Internet Explorer



Microsoft Edge



Safari.



We recommend you speak to the person in your organisation who oversees your IT solutions to find out which of the above they support and recommend for your organisation.

To access the portal, type in (or copy and paste) the following address into your preferred internet browser: <https://ageuk.microsoftcrmportals.com>, then press the enter key.

This will take you to the portal sign-in page.

On the sign in page, you'll need to complete the following steps:

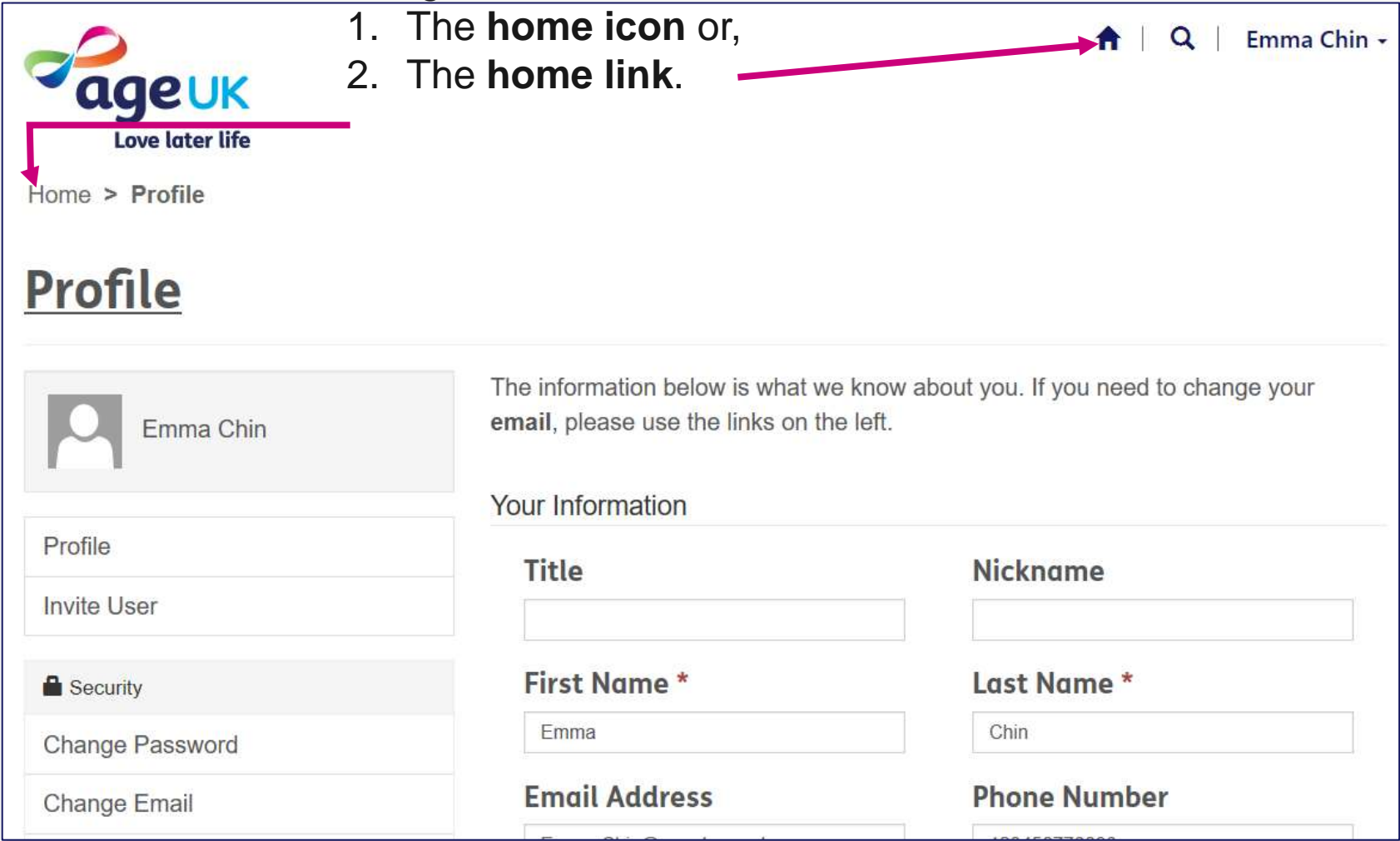
1. Enter your Age UK email address into the **Username** box.
2. Enter the password you created (or were given) into the **Password** box.
3. Navigate the cursor to the **Sign In** button and click on it.

The screenshot shows the Age UK sign-in page. At the top left is the Age UK logo with the tagline "Love later life". At the top right are a search icon and a "Sign In" link. Below the logo are two buttons: "Sign In" and "Redeem Invitation". The page is divided into two sections: "Sign in with a local account" and "Sign in with an external account". Under "Sign in with a local account", there are two input fields: "* Username" and "* Password". Below these fields is a "Remember me?" checkbox and a "Sign In" button. Below the "Sign In" button is a "Forgot Your Password?" button. Under "Sign in with an external account", there is a pink "Azure AD" button. A red arrow points from a pink callout box to the "Azure AD" button. The callout box contains the text "! Ignore this button." At the bottom of the page, there are three links: "My Portal", "Bulk Orders", and "View All Cases". At the very bottom, there is a footer with links for "Linking Policy", "Terms and conditions", "Privacy policy", "Publications", "Cookies", "Safeguarding", "About us", "Sitemap", and "Contact Us". Below the footer is the text: "Age UK, Tavist House, 1-6 Tavistock Square, London WC7H 9HA, Registered charity number 1128267, Company number 6825798. © Age UK Group and/or its National Partners (Age NI, Age Scotland and Age Cymru) 2018. All Rights Reserved."

When the page refreshes, you'll either be taken to the main homepage or your user profile.

If you are on your profile page (*which will look like the image below*) and want navigate out of it, click on either:

- 1. The **home icon** or,
- 2. The **home link**.



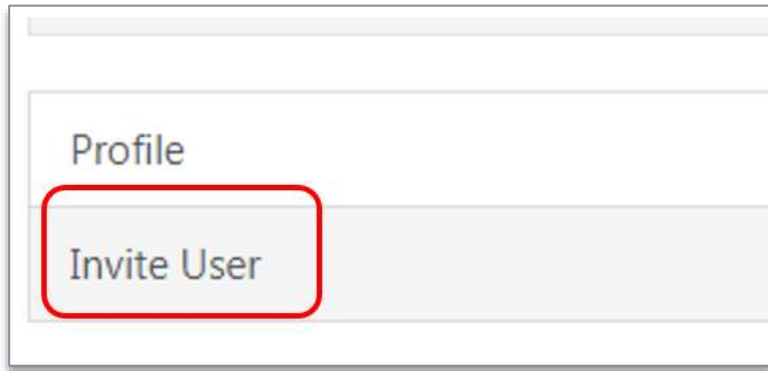
If you choose to stay on your profile page, you can check and amend any of the details within the **Your Information**.

Please refer to the [how to manage your user account](#) section of this guide for details on how to do this.

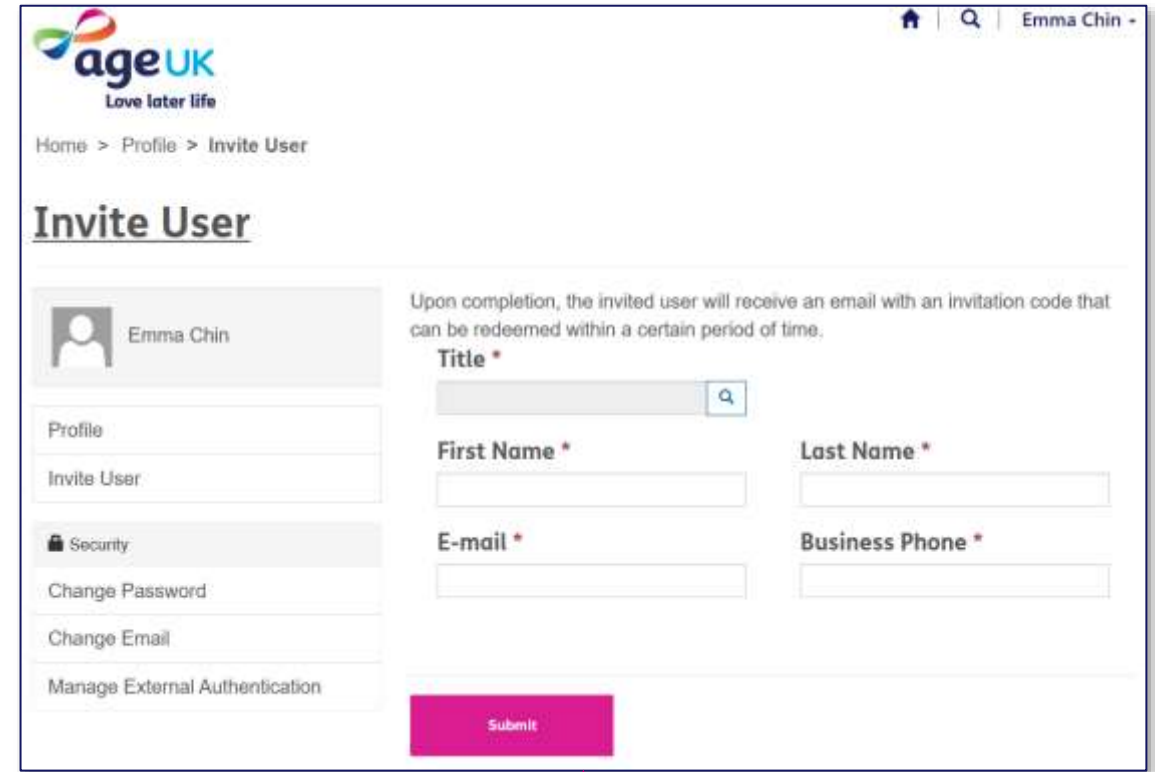
CREATING NEW USER ACCOUNTS WITHIN THE PORTAL.

The following steps can only be carried out by the individual your organisation has been nominated to be the Primary Portal User.

1. Log into the portal (as outlined on [page 11](#)).
2. On the My Profile page, navigate to the left side of the screen and click on **Invite User**.



You'll be presented with a form that you will need to complete before an invitation email can be sent to the individual.

A screenshot of the 'Invite User' form in the ageUK portal. The page header shows the ageUK logo with the tagline 'Love later life', a home icon, a search icon, and the user name 'Emma Chin'. The breadcrumb trail is 'Home > Profile > Invite User'. The main heading is 'Invite User'. On the left, there is a user profile card for 'Emma Chin' and a sidebar menu with 'Profile' (containing 'Invite User'), 'Security' (containing 'Change Password', 'Change Email', and 'Manage External Authentication'), and a 'Submit' button at the bottom. The main form area contains a message: 'Upon completion, the invited user will receive an email with an invitation code that can be redeemed within a certain period of time.' Below this are input fields for 'Title *', 'First Name *', 'Last Name *', 'E-mail *', and 'Business Phone *'. A pink 'Submit' button is located at the bottom right of the form. A red arrow points from the 'Submit' button in the sidebar to the 'Submit' button in the main form.

3. Click on the magnifying glass next to the **Title** field.



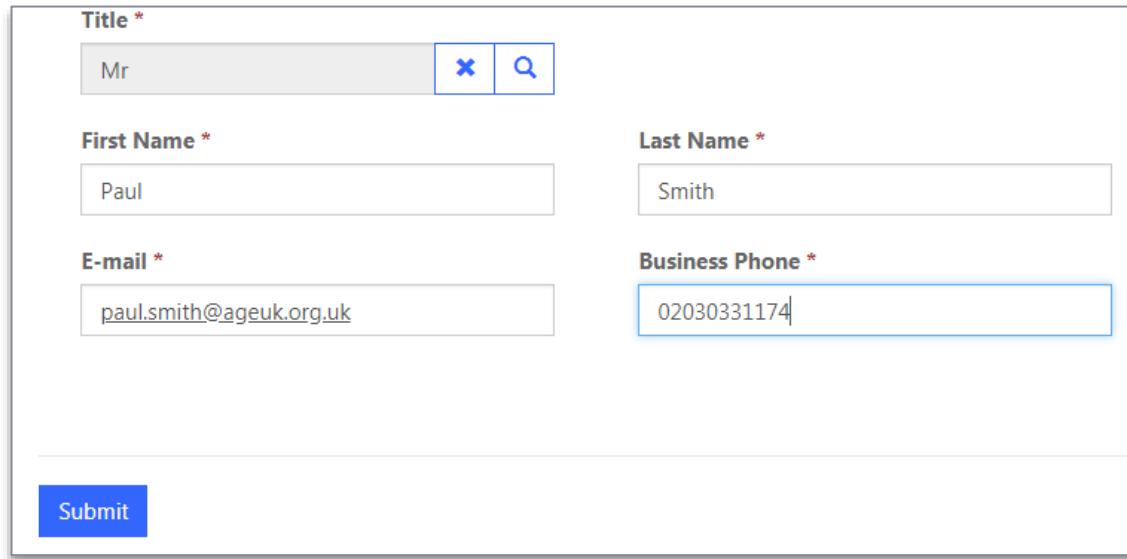
4. And then enter the title you want to search for in the box (e.g. Mr, Mrs, Miss, Mx, etc.) and press enter.



5. To select the relevant title, click into the left column to add a tick, then press **Select**.



6. Now enter the rest of the employee or volunteer's details – their first name, last name, email address and organisation's (business) phone number.



The form contains the following fields and values:

- Title ***: Mr
- First Name ***: Paul
- Last Name ***: Smith
- E-mail ***: paul.smith@ageuk.org.uk
- Business Phone ***: 02030331174

A blue **Submit** button is located at the bottom left of the form.

This will trigger the email invitation to be sent to the individual. The email will contain a link that they must click on to complete their registration and activate their portal account.

7. Press **Submit**.

PORTAL REGISTRATION: REDEEMING YOUR INVITATION TO THE APPLICATION.

The following steps only need to be completed by those who have received an invitation email.

New user accounts created inside the portal will receive an email from **SVC_ADX_Emailout@ageuk.org.uk**, usually within a few minutes of their account being set up.

The email will explain that they have been invited to the portal and that they will need to click on the invitation link to redeem it.

The invitation must be redeemed within 5 days, otherwise the code will expire.

Completing your portal registration.

1. Once you have clicked on the **Redeem Your Invitation** link, you'll be redirected to the portal sign-in page with the invitation code box pre-populated.
2. Press **Register** button.



3. If the invitation code is still valid, the page will refresh to display a blank registration form, which you'll need to complete.

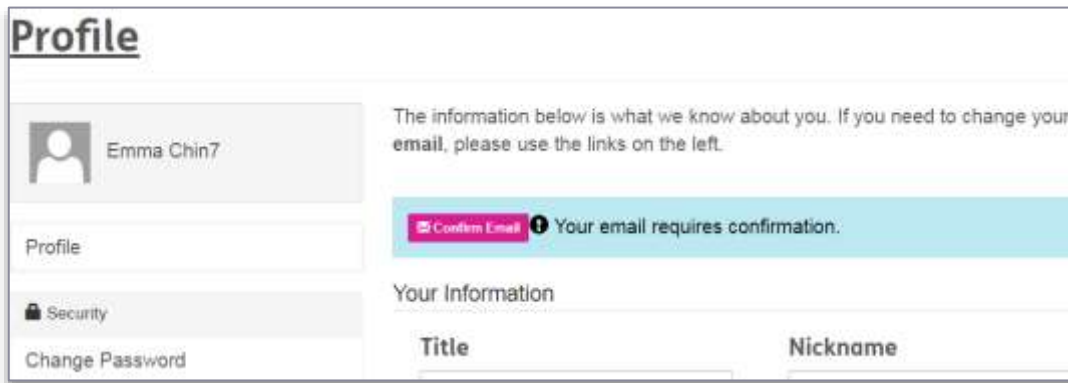
The screenshot shows the ageUK website's registration page. At the top left is the ageUK logo. Below it is a link for "Sign in Love later life invitation". A light blue banner displays a long alphanumeric "Redeeming code". Below the banner are two registration options: "Register for a new local account" and "Register using an external account". The local account form includes fields for Email, Username, Password, and Confirm Password, each with an asterisk indicating it is required. A blue "Register" button is positioned below the Confirm Password field. A blue "Azure AD" button is located between the Email and Username fields. At the bottom left, there is a "My Portal" link and a list of other links including "Linking Policy", "Terms and conditions", "Privacy policy", "Publications", "Cookies", "Safeguarding", "About us", "Sitemap", and "Contact Us". At the bottom right, there is a "View All Cases" link. A footer at the very bottom contains the organization's address, charity and company numbers, and copyright information.

1. Type your email address into the **Email** and **Username** boxes.
2. Type a new password into the **Password** box. *Please note your password must contain upper and lower case letters, numbers and special characters (e.g. g. @/Λ& etc).*
3. Type in the same password into the **Confirm Password** box.
4. Press the **Register** button.

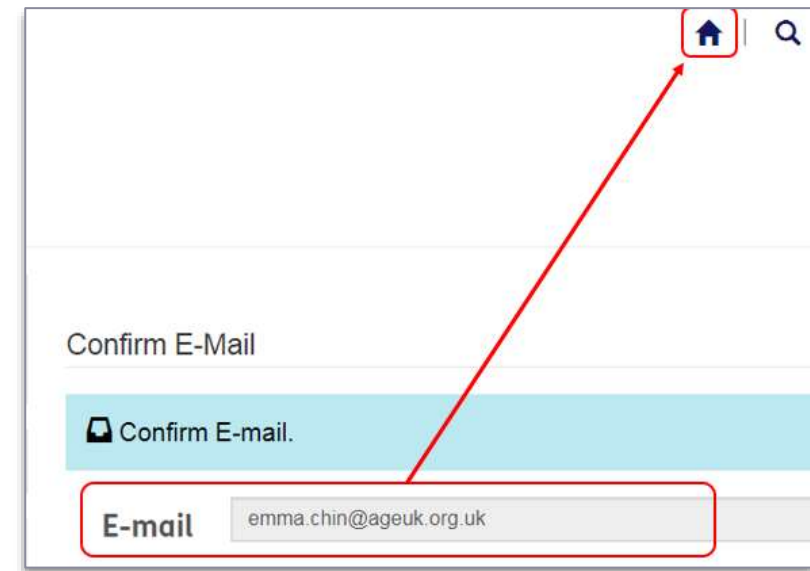
PORTAL REGISTRATION: CONFIRMING YOUR EMAIL ADDRESS.

The first time you log into the portal, the system will ask you to confirm your email address.

1. From the Profile page, click on the **Confirm email** button.



2. The page will refresh to show your email address.



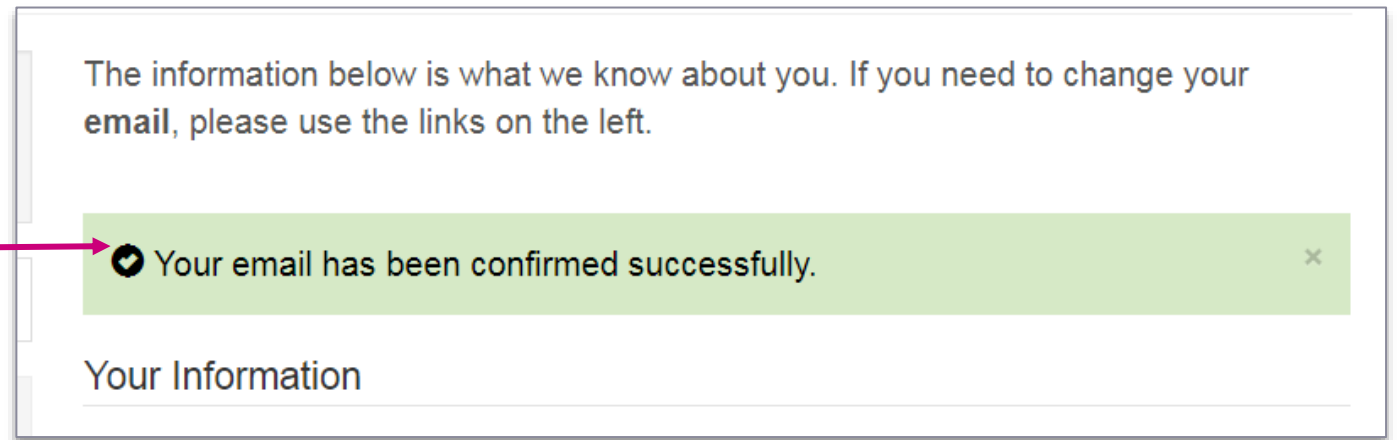
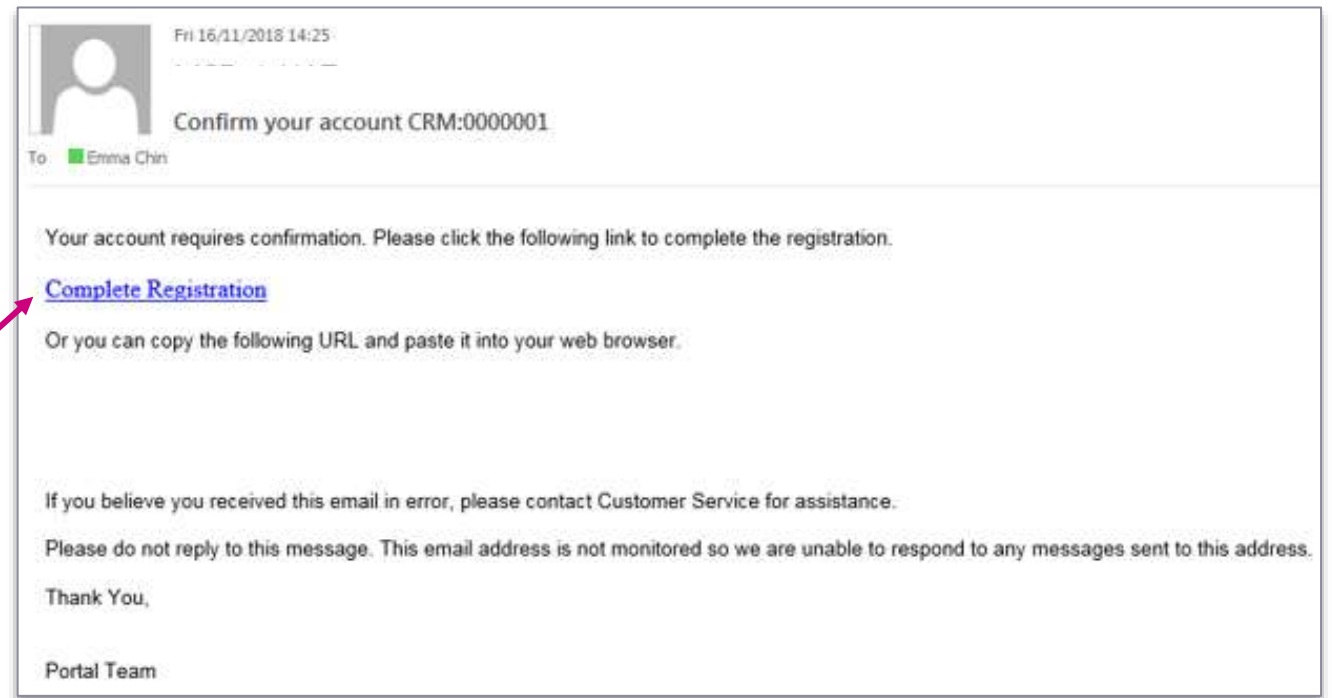
Check the information is correct, then click on the **home** icon to return to your home page.

Clicking the **Confirm Email** button in the portal will trigger an email to be sent to your email address.

3. Open your email account and within a few minutes you should receive an email from **SVC_ADXEmailOut**.

Open the email, and click on **Complete Registration**.

4. A new internet browser window will open with your profile displayed and this message.



HOW TO MANAGE YOUR USER ACCOUNT PROFILE.

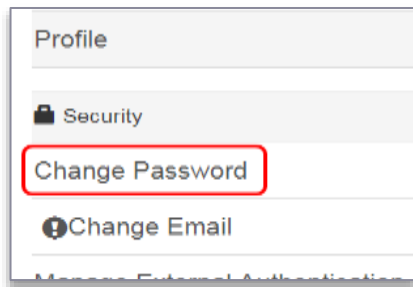
The following pages will outline the steps for updating your profile record.



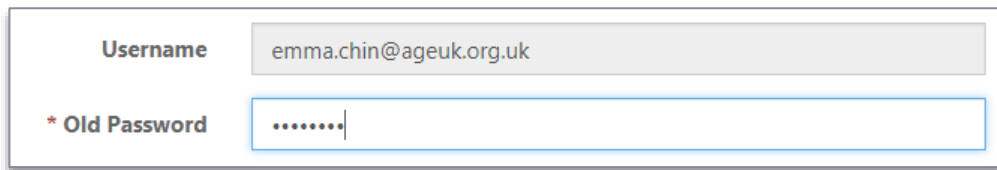
HOW TO CHANGE YOUR PORTAL PASSWORD.

If you have been sent a temporary portal password by email, or wish to change your password, then please follow these instructions.

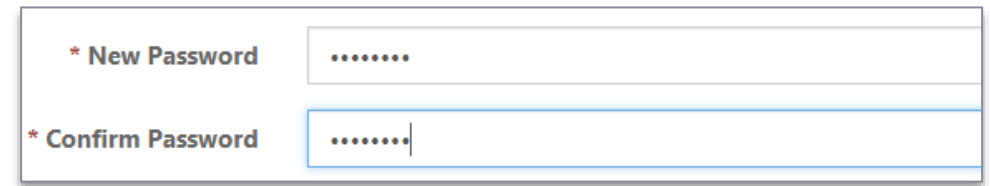
1. Log into the portal.
2. Within the “My Profile” page, navigate to the left column and click on **Change Password**.



3. Type in your current password into the **Old Password** box.

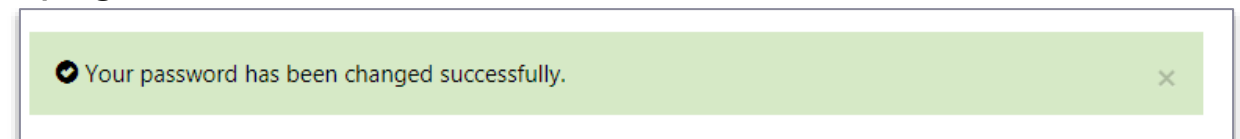
A screenshot of a password change form. It has two input fields: 'Username' with the value 'emma.chin@ageuk.org.uk' and '* Old Password' which is currently empty and filled with dots. The form has a light gray background and a white border.

4. Type in your new password into the **New Password** and **Confirm Password** boxes.

A screenshot of the password change form showing the 'New Password' and 'Confirm Password' fields. Both fields are currently empty and filled with dots. The form has a light gray background and a white border.

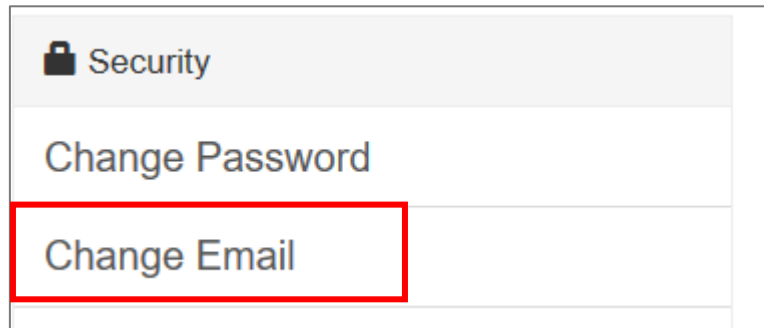
Please note your password must contain upper and lower case letters, numbers and special characters (e.g. g. @/!& etc).

5. Click on **Change Password**. If the change has been successful, a confirmation message will appear on the page.



HOW TO CHANGE YOUR EMAIL ADDRESS

1. Log into the portal.
2. Within the “My Profile” page, navigate to the left column and click on **Change Email**.



3. Overtyping your new email address into the email box.



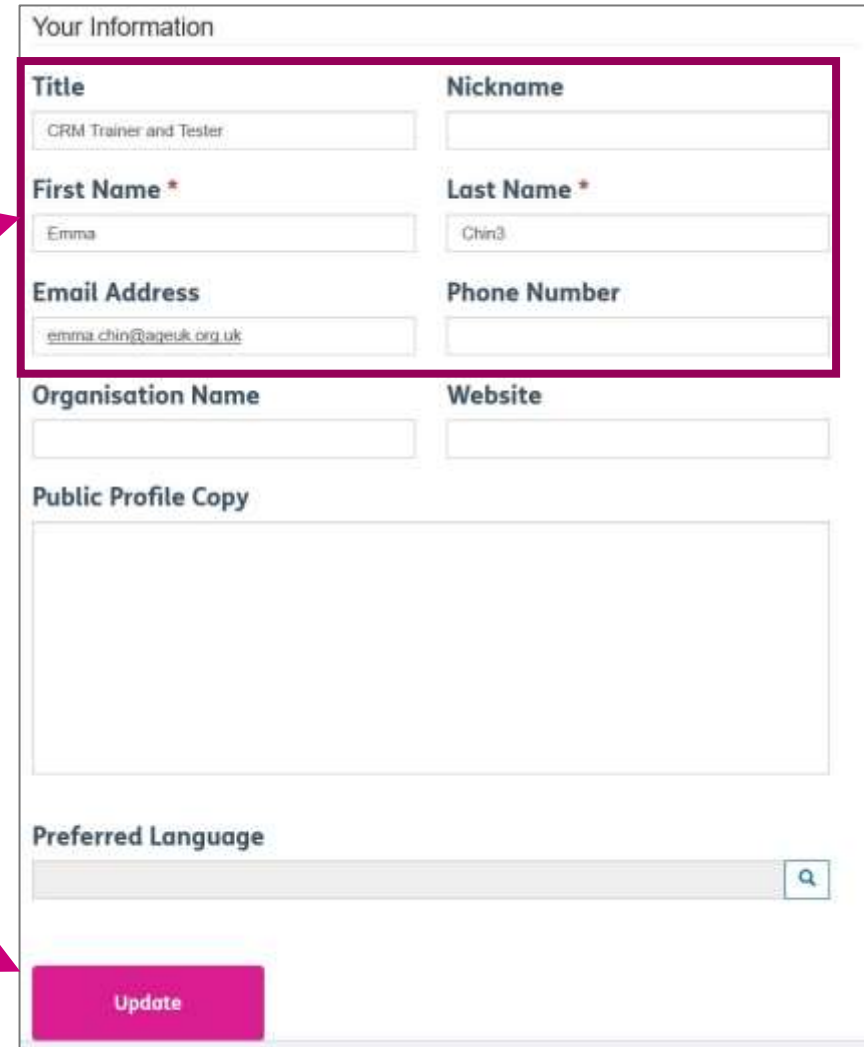
4. Press **Change and Confirm email**.
5. If successful, the screen will reload displaying the login page and you'll need to sign-in again with the new details.

Then follow the same steps outlined in [Portal Registration: confirming your email address](#) section.

HOW TO EDIT YOUR PERSONAL INFORMATION

If you spot any errors in you details, you can delete the existing details and then add the new ones as required.

If you do make any changes to this page, press the **Update** button to save these amends.

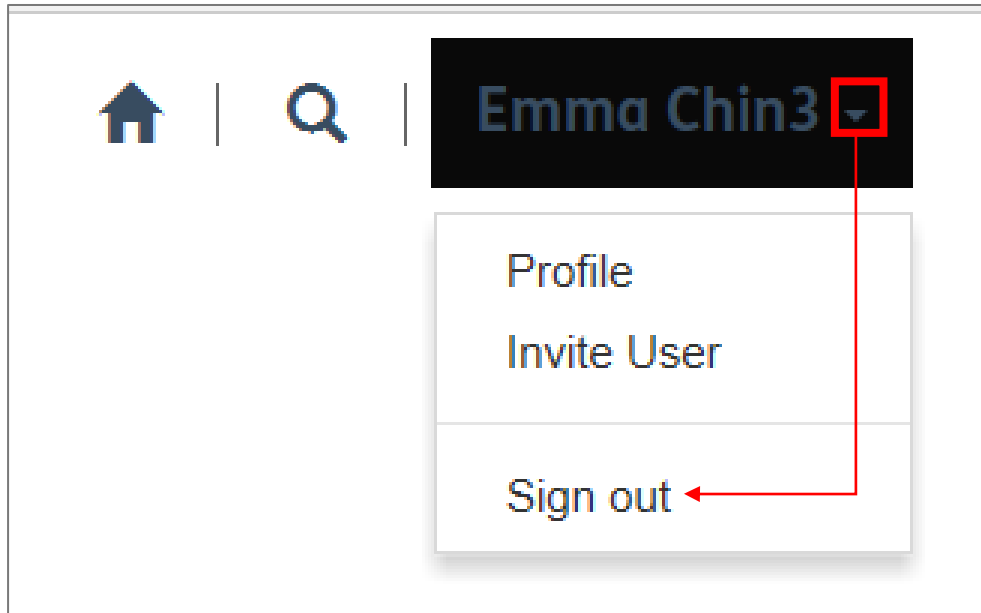


The screenshot shows a form titled "Your Information" with the following fields:

- Title**: CRM Trainer and Tester
- Nickname**: (empty)
- First Name ***: Emma
- Last Name ***: Chin3
- Email Address**: emma.chin@ageuk.org.uk
- Phone Number**: (empty)
- Organisation Name**: (empty)
- Website**: (empty)
- Public Profile Copy**: (empty text area)
- Preferred Language**: (dropdown menu with a search icon)
- Update**: A red button at the bottom.

Two red arrows point from the text on the left to the form: one points to the "First Name" field, and the other points to the "Update" button.

HOW TO LOG OUT OF THE PORTAL



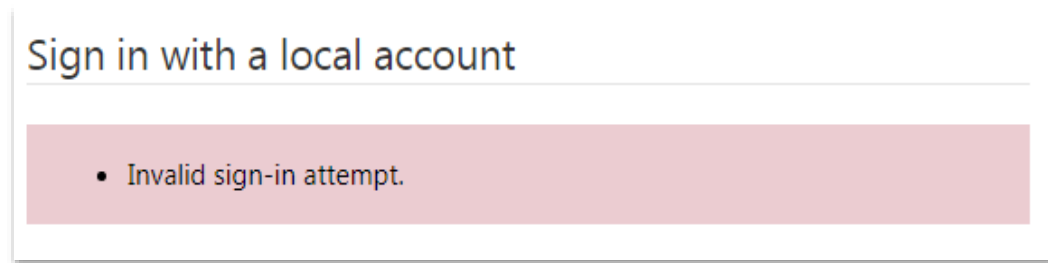
Press the arrow beside your name at the top of the page.

Then select **Sign Out**.

TROUBLESHOOTING

Q. I'm trying to login but I'm getting an invalid login message. What should I do?

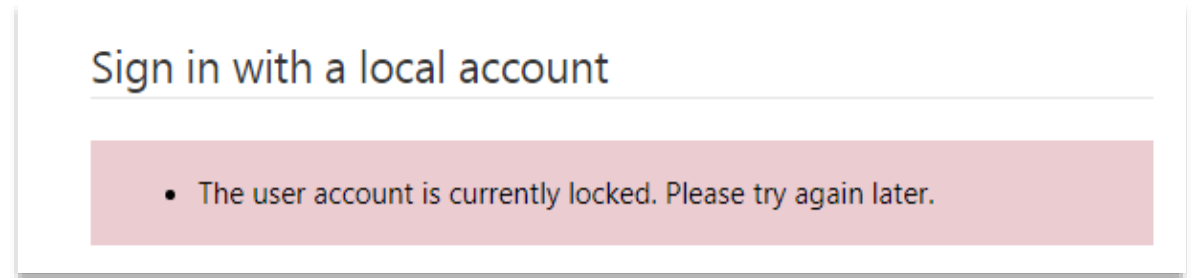
If the login page is displaying the below message:



- A. Check the **username** you've entered matches the one you were sent or you set up when your account was first created.
- B. Check the **password** is the same as the one you first signed up with (or the recent password you changed it to).
- C. If you are not sure what either of those details are, email portalaccess@ageuk.org.uk.

Q. I'm trying to login but I'm getting an message stating my account is locked. What should I do?

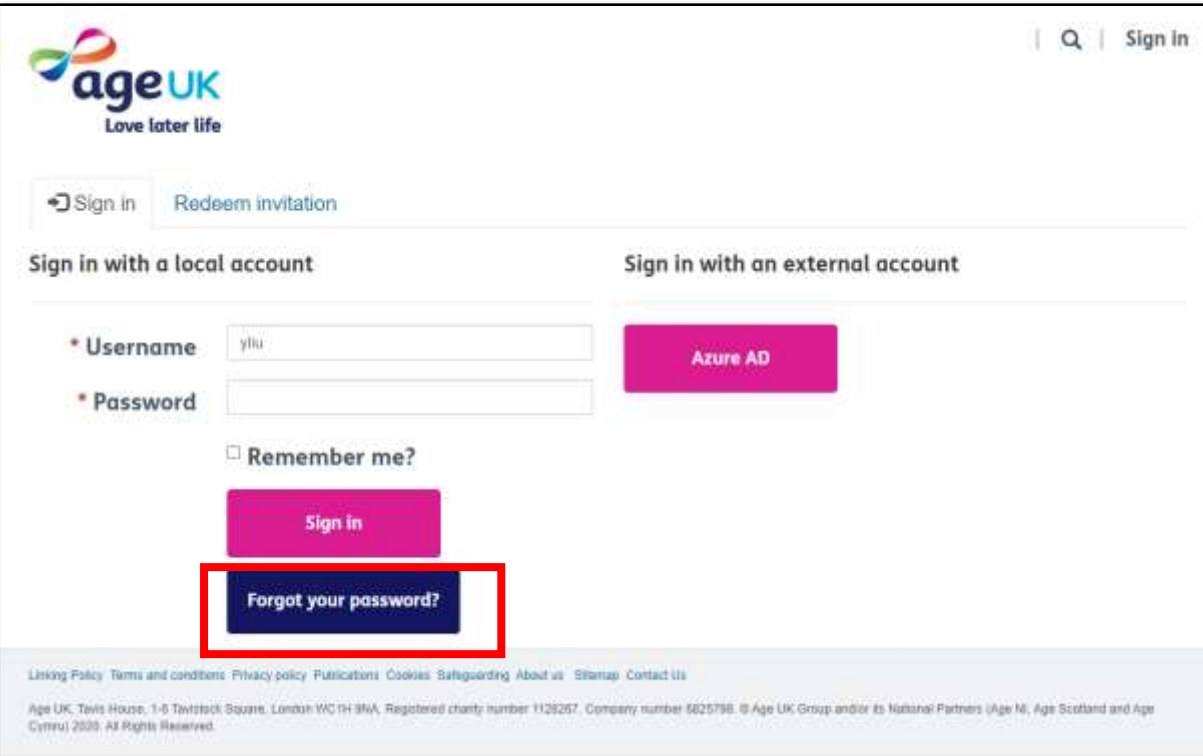
If the login page is displaying the below message:



- A. Your account will remain locked for **24 hours**. If you remember the login details, you'll be able to try again after this time has passed.
- B. If you urgently need to login or still can not recall you details, email portalaccess@ageuk.org.uk and one of the team will unlock your account and reset your password.

Q. I've forgotten my password,
what should I do?

On the sign in page, press the **Forgot your password** button.



The screenshot shows the Age UK sign-in page. At the top left is the Age UK logo with the tagline "Love later life". At the top right are search and sign-in icons. Below the logo are two tabs: "Sign in" (selected) and "Redeem invitation". The page is divided into two sections: "Sign in with a local account" and "Sign in with an external account". Under "Sign in with a local account", there are input fields for "Username" (containing "yhu") and "Password", a "Remember me?" checkbox, and a pink "Sign in" button. Below these is a dark blue button labeled "Forgot your password?", which is highlighted with a red rectangle. Under "Sign in with an external account", there is a pink "Azure AD" button. At the bottom, there is a footer with links for "Linking Policy", "Terms and conditions", "Privacy policy", "Publications", "Cookies", "Safeguarding", "About us", "Stamps", and "Contact Us". Below the footer is a small copyright notice: "Age UK, Tevel House, 1-6 Tavistock Square, London WC1H 9NA, Registered charity number 1126267, Company number 6625796. © Age UK Group and/or its National Partners (Age NI, Age Scotland and Age Cymru) 2020. All Rights Reserved."

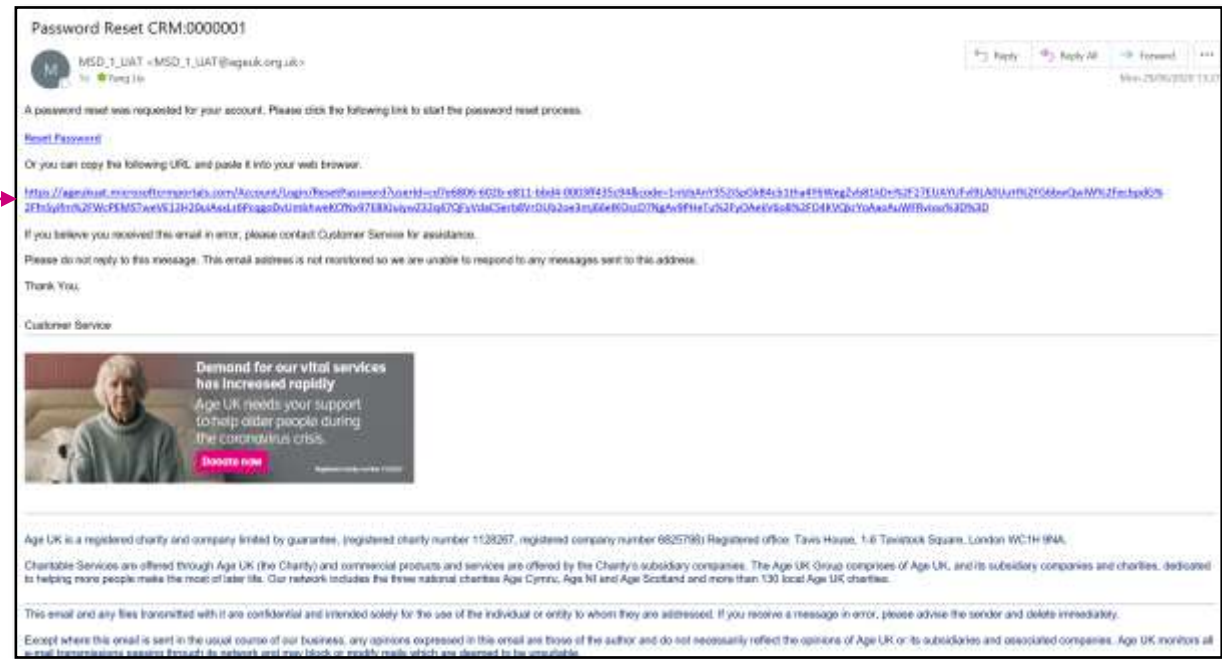
On the new page, type in the email address registered to your portal account (this should be your work email address).

Then press the **send** button.



Within a couple of minutes, you'll receive a reset password email, containing links to the rest password page.

You can either click on the reset password hyperlink, or copy and paste the page url into your web browser.



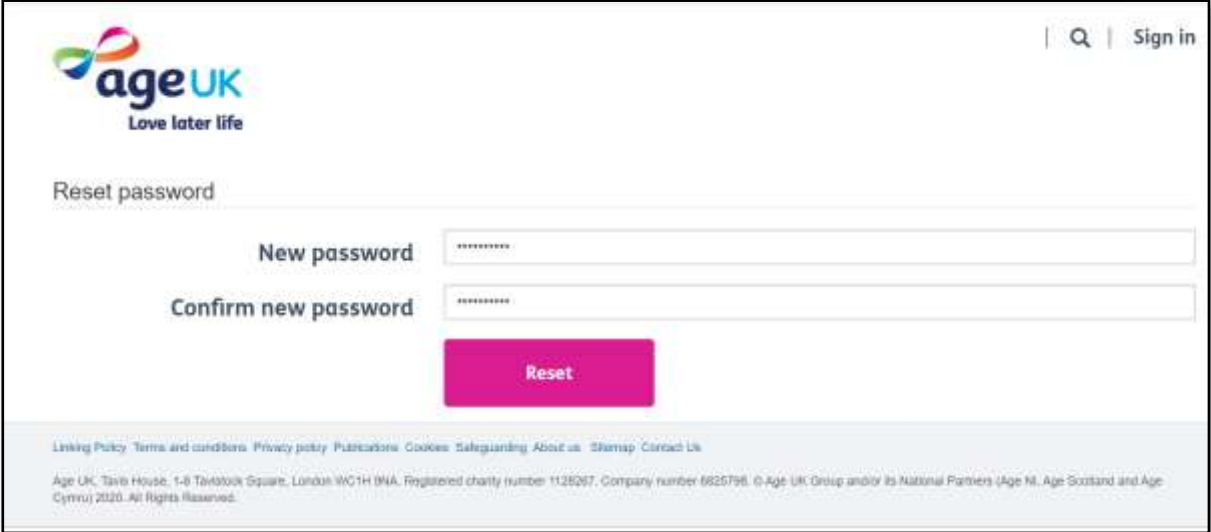
On the reset password page, type a new password into both the **New Password** and **Confirm new password** fields.

The password must contain:

- Lowercase
- Uppercase
- Numbers
- Special character (e.g. £* !)

Press the **Reset** button to update these changes.

Once the changes have been saved, you'll return to the login page where you can sign in with your new password.



ageUK
Love later life

Reset password

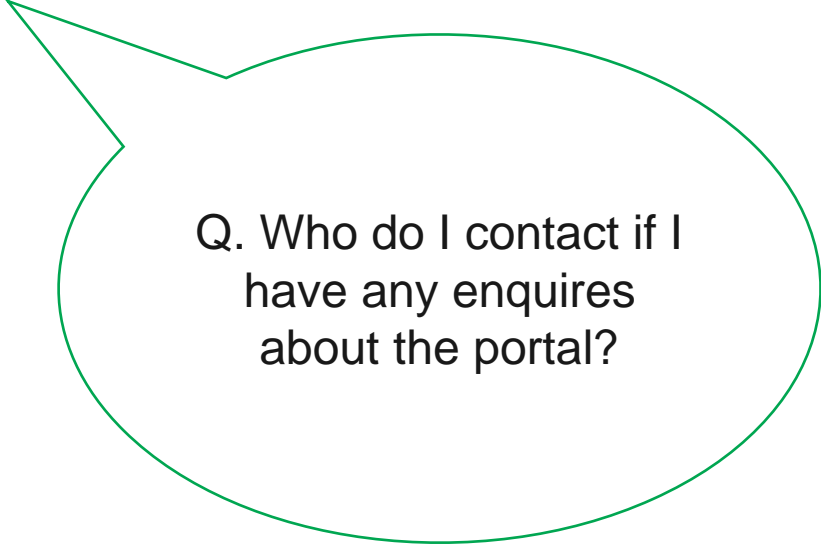
New password

Confirm new password

Reset

[Linking Policy](#) [Terms and conditions](#) [Privacy policy](#) [Publications](#) [Cookies](#) [Safeguarding](#) [About us](#) [Sitemap](#) [Contact Us](#)

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Q. Who do I contact if I have any enquires about the portal?

We would recommend checking the help pages on Brand Partner Digital Hub as there is a number of resources that have been uploaded there, designed to help you get the most out of using this application.

Need help?

We will soon be creating a page on The Loop and also on the BP Digital Hub.

However, if you need any further help in the meantime, please send an email to our business support team at BSupportAdmin@ageuk.org.uk.

ADDITIONAL QUICK START GUIDES

My Organisation Info

This guide will show users how to navigate to the part of the portal that holds information about their organisation.

Location and Shops

This guide will show users how to manage the information displayed in the Age UK local directory relating to the locations and shops they oversee.

Services Delivered

This guide will show users how to manage the information displayed in the Age UK local directory relating to the services they offer.

Community Signposts

This guide will show users how to manage the information displayed in the Age UK local directory relating to community signposts they use.

Events And Activities

This guide will show users how to manage the information displayed in the Age UK local directory relating to the events and activities they organise.

FURTHER SUPPORT

For more information about the Brand Partner Portal, please visit <https://bp-digital-hub.ageuk.org.uk/partner-portal/>

If you need any additional help or come across any other problems, please send an email to BSupportAdmin@ageuk.org.uk.

