

# BRAND PARTNER PORTAL

Organisation Information.

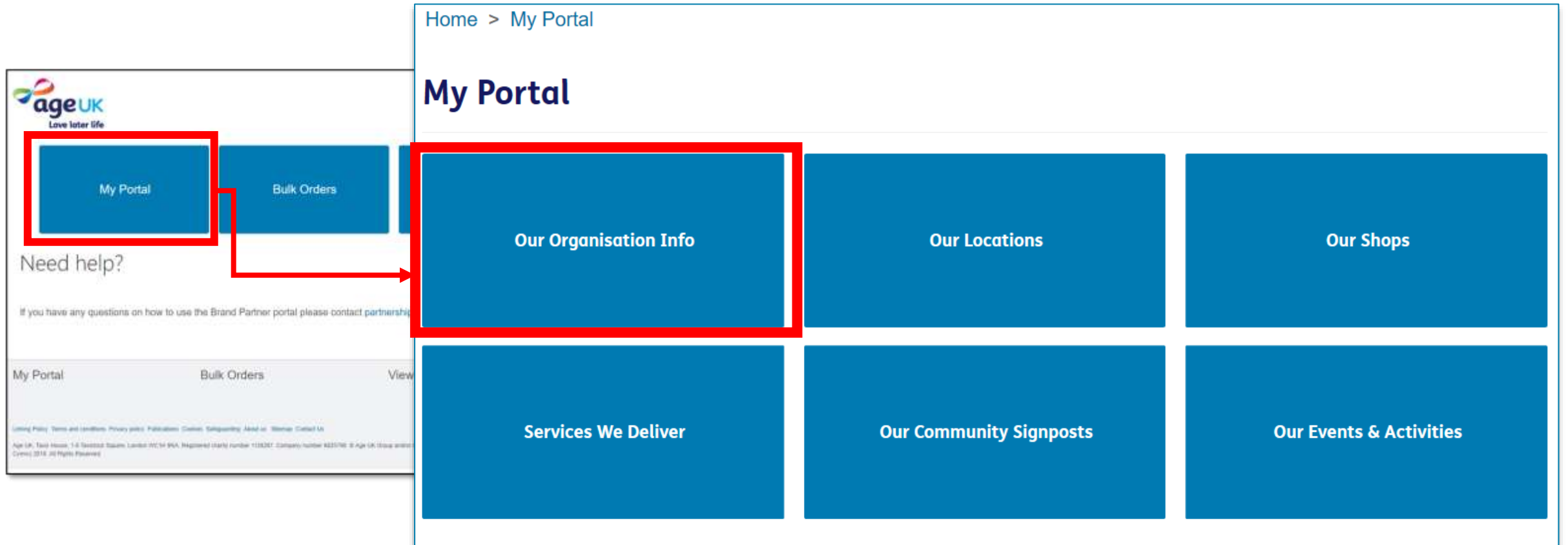


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# INTRODUCTION

From the portal homepage, press the **“My Portal”** tile followed by **“Our Organisation Info”**.



You'll be directed to a page displaying the information Age UK National holds about your organisation, which includes your contact information, the total number of staff and volunteers you employ, the name of your CEO and the systems you use.

Within this page, you'll be able to view, and make changes to information we hold.

Whilst the majority of the details on this page will be for internal use, some of the information will also be displayed in the Age UK Local Directory, so you will be able to ensure the information published on those pages are always kept up to date.

Any fields with a red asterisk "\*" signifies that it is a mandatory field and must be filled in before you can leave the page.

The screenshot shows a web form titled "Our Organisation Information" from Age UK. The form is divided into several sections:

- Organisation name:** "Age UK Kington - Heart Of the" (with a red asterisk). A note below says "Please email BSupportAdmin@ageuk.org.uk to change this field."
- Postcode:** "W16 1KE"
- Website address:** "https://www.ageukkentown.org"
- Main address:** "4 Bowdler Road, St. Helens, Merseyside W10 1AC, United Kingdom"
- Image URL Desktop:** "https://www.ageuk.org.uk/.../assets/images/heart-of-the-1000x600.jpg"
- Image URL Mobile:** (empty)
- Contact telephone number:**
  - Main number \*:** "07346789"
  - Information & Advice number (Internal Use Only):** (empty)
- Contact email address:**
  - General email \*:** "info@ageukkentown.org"
  - Volunteer enquiry email (Internal Use Only):** "vol@ageukkentown.org"
  - Integration email address (Internal Use Only):** "info@ageukkentown.org"
- Staff Details:** (Note: "The fields in this section are for internal use only.")
  - CEO name:** "Victor Chini" (with a red asterisk). A search icon and "Add Age UK Contact?" button are next to it.
  - Number of staff:** "10"
  - Number of volunteers:** "31"
  - Number of People Reached April 2019 - March 2020:** "81"
  - Full Name:** A list of names: "Emma Chin3", "Emma Chin8", "V Chin25", "Victor Chini".
  - Is the new 2020 shops template(s) activated \*:** "No" (with a red asterisk).

# HOW TO UPDATE YOUR ORGANISATION INFORMATION.

The next few pages will outline the steps you need to follow if you need to add or update the details we hold about your organisation.



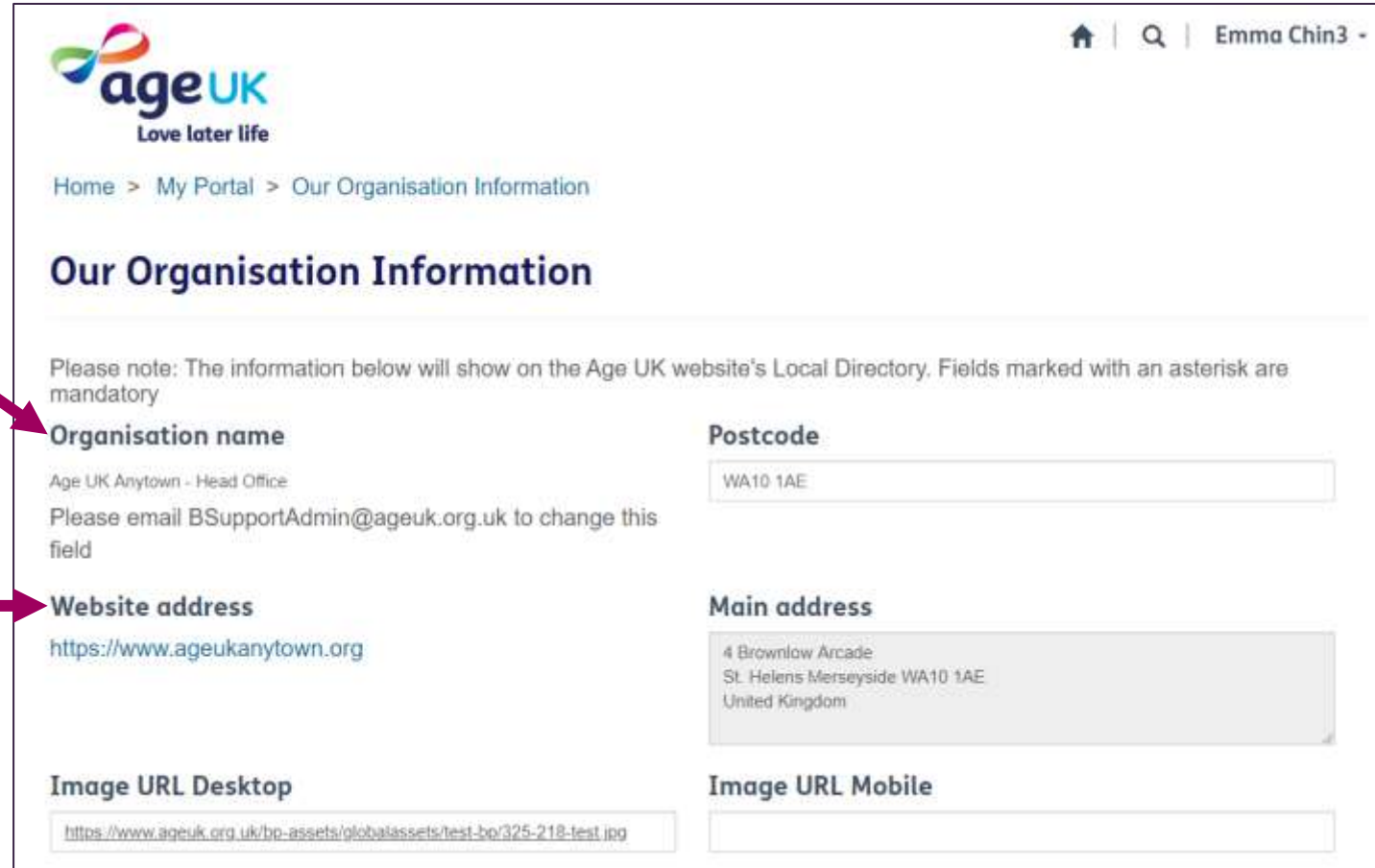
# UPDATING ORGANISATION DETAILS

There are only two elements on this page which you **cannot edit in the portal**:

**Organisation Name** – this is the information we have on the Brand Partner agreement documents. So any amendments to this will need to be agreed in advanced. Please send any such amendments to [BSupportAdmin@ageuk.org.uk](mailto:BSupportAdmin@ageuk.org.uk).

## Website Address

This is the website that our Local Directory will navigate users to. If this needs changing please email [BSupportAdmin@ageuk.org.uk](mailto:BSupportAdmin@ageuk.org.uk)



ageUK  
Love later life

Home > My Portal > Our Organisation Information

## Our Organisation Information

Please note: The information below will show on the Age UK website's Local Directory. Fields marked with an asterisk are mandatory

<b>Organisation name</b> Age UK Anytown - Head Office Please email <a href="mailto:BSupportAdmin@ageuk.org.uk">BSupportAdmin@ageuk.org.uk</a> to change this field	<b>Postcode</b> WA10 1AE
<b>Website address</b> <a href="https://www.ageukanytown.org">https://www.ageukanytown.org</a>	<b>Main address</b> 4 Brownlow Arcade St. Helens Merseyside WA10 1AE United Kingdom
<b>Image URL Desktop</b> <a href="https://www.ageuk.org.uk/bp-assets/globalassets/test-bp/325-218-test.jpg">https://www.ageuk.org.uk/bp-assets/globalassets/test-bp/325-218-test.jpg</a>	<b>Image URL Mobile</b>

However on the rest of the page, any text surrounded by rectangle is a field that you can click and edit.

For example, if you need to edit the registered address for your organisation, there are two ways in which you can do so:

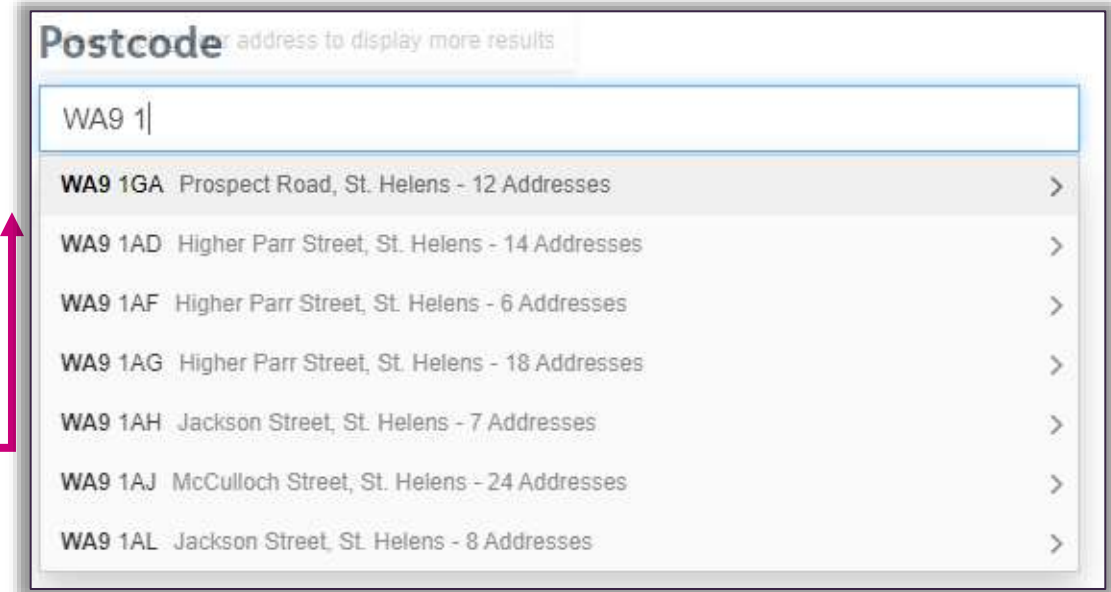
### 1. Using the Postcode field.

a) Click into the Postcode field, and delete the existing information in there.



A screenshot of a form field labeled "Postcode" in bold blue text. Below the label is a text input box containing the text "WA10 1AE". The entire field is enclosed in a thin black rectangular border.

b) Now type in the new postcode.



A screenshot of a dropdown menu for the "Postcode" field. The menu title is "Postcode" with a subtitle "address to display more results". The input field contains "WA9 1|". Below the input field is a list of search results, each with a right-pointing chevron icon:

WA9 1GA	Prospect Road, St. Helens - 12 Addresses	>
WA9 1AD	Higher Parr Street, St. Helens - 14 Addresses	>
WA9 1AF	Higher Parr Street, St. Helens - 6 Addresses	>
WA9 1AG	Higher Parr Street, St. Helens - 18 Addresses	>
WA9 1AH	Jackson Street, St. Helens - 7 Addresses	>
WA9 1AJ	McCulloch Street, St. Helens - 24 Addresses	>
WA9 1AL	Jackson Street, St. Helens - 8 Addresses	>

A pink arrow points from the bottom of the first step's form to the top of this dropdown menu.

When you type in the new postcode, the system will list addresses that match it based on the information that sits on the [Postcode Address File](#) (PAF). To select the relevant one, click on the search result line. When you save the record, the system will add the address details to the Main Address box.

## Searching via the Main Address box.

An alternative process is to click into the **Main Address** box.

Doing so will display the address form, where you can manually edit each address line.

The image shows a user interface for managing addresses. At the top, there is a 'Main address' box containing the text: '4 Brownlow Arcade', 'St. Helens Merseyside WA10 1AE', and 'United Kingdom'. Below this, an address form is expanded, showing individual input fields for 'Address line 1' (4 Brownlow Arcade), 'Address line 2', 'Address line 3', 'City' (St. Helens), 'State/Province' (Merseyside), 'ZIP/Postal code' (WA10 1AE), and 'Country/Region' (United Kingdom). A prominent pink 'Done' button is located at the bottom of the expanded form. A pink arrow points from the text 'click into the Main Address box.' to the 'Main address' box. Another pink arrow points from the text 'manually edit each address line.' to the 'City' field. A third pink arrow points from the text 'press Done' to the 'Done' button.

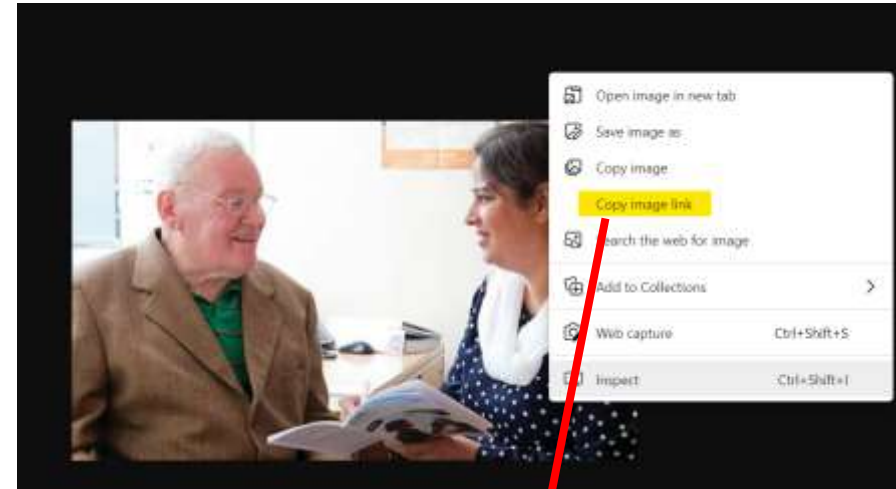
When you have finished, press **Done**. The changes will be applied straight away to the address box, but you must press the Save button at the bottom of the page to ensure the update is stored on the record.



## Image URL.

An image URL is an internet address that points directly to a specific image, rather than a webpage or website.

If there a specific image you would like included on the webpage for your organisation, adding the image address to this field will ensure it is included when the directory page is created.



### Image URL Desktop

<https://www.ageuk.org.uk/globalassets/age-uk/media/featured/500x300/500x3>

For further details on the image size and format that can be used in the portal, please visit <https://bp-digital-hub.ageuk.org.uk/image-size-reference-guide/>

If you need to edit the public contact number or email address for your organisation, you can do so by:

- Clicking into the field.
- Deleting the information already in there.
- Typing in the new information.

There is also space for you to share additional contact details for your I&A and volunteering services. This information will only be used internally and will not be displayed in the local directory.

### Contact telephone number

**Main number \***

**Information & Advice number (Internal Use Only)**

### Contact email address

**General email \***

**Volunteer enquiry email (Internal Use Only)**

**Integration email address (Internal Use Only)**

Under the **Staff Details** section, you will be able to view and update the existing data about the people you employ.

### CEO details

The person we have down as your CEO will be visible in this field. If you need to change this, please refer to the [Changing Your CEO details](#) page for the steps on how to do this.

Here you can add a new record for staff or volunteers who will be a key contact to Age UK National.

The screenshot shows a form titled "Staff Details" with a sub-header "The fields in this section are for Internal Use Only". The form is divided into two columns. The left column contains three input fields: "CEO name" with the value "Victor Chin4", "Number of staff" with the value "12", and "Number of volunteers" with the value "30". The right column contains a pink button labeled "Add Age UK Contact?", a "Full Name" header with an upward arrow, and a list of three entries: "Emma Chin3", "Emma Chin8", and "V Chin25", each with a dropdown arrow. A pink box highlights the "Add Age UK Contact?" button. Red arrows point from the text blocks to the "CEO name" field, the "Add Age UK Contact?" button, the "Number of staff" field, and the list of names.

This is a list of existing staff and volunteer records. These represent those who have been in contact with us for I&A support/resources and/or individuals with access to the portal.

### Number of staff/ volunteers

This field is free text, so you will need to manually update it as and when your staffing or volunteer numbers change.

View details

### Details

**Title**  
—

**First Name**  
Andrew

**Last Name \***  
Johnson

**Personal Email**  
a @gmail.com

**Local Age UK User**  
Age UK Suffolk - Head Office

To view existing contact records, click on the down arrow to the right of their name, and select **View Details**. *A read only version of the record will appear.*

**Full Name ↑**

Andrew Johnson

Emma Chin3

Justi Mavker

Remove Contact

View Details

If the staff member/volunteer no longer works for your organisation, click on the down arrow to the right of their name, and select **Remove Contact**, then follow instructions on the screen.

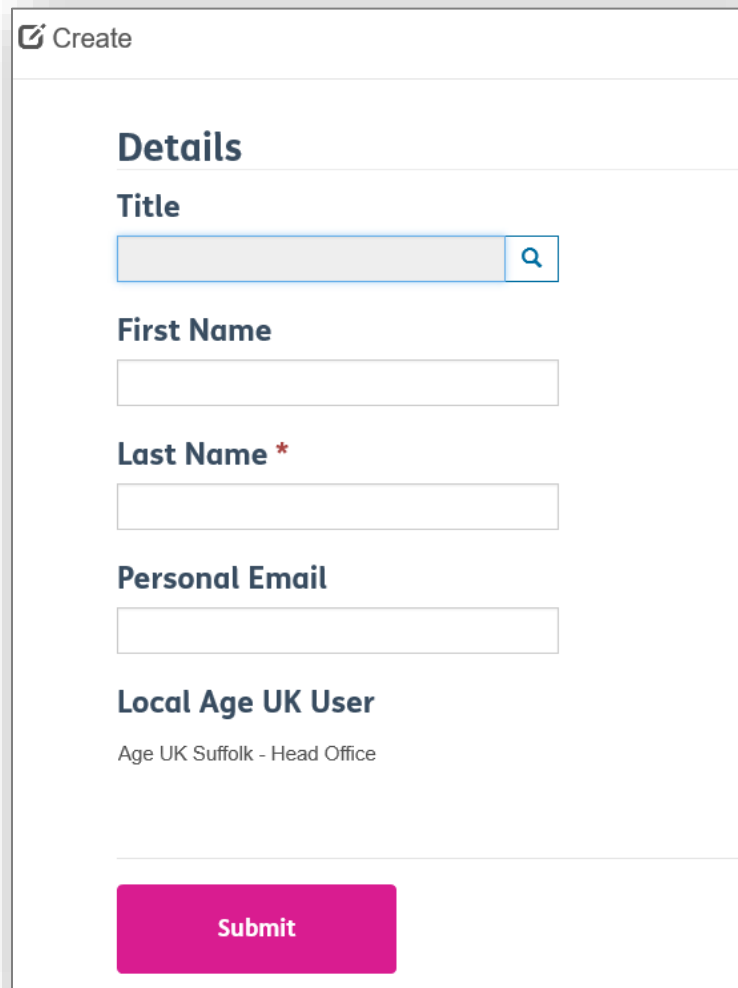
Remove Contact

Are you sure you want to remove this Contact?

Yes

Cancel

To add a new Age UK contact for your organisation, click on '**Add Age UK Contact**'. The following form will appear for you to complete as follows:



The screenshot shows a 'Create' form with the following sections and fields:

- Details**
  - Title**: A text input field with a magnifying glass icon on the right.
  - First Name**: A text input field.
  - Last Name \***: A text input field.
  - Personal Email**: A text input field.
- Local Age UK User**
  - Age UK Suffolk - Head Office

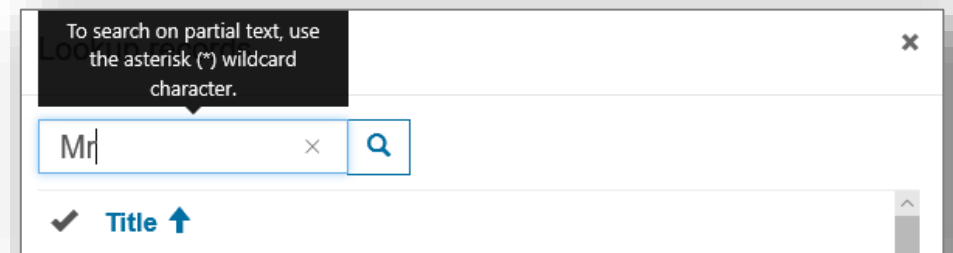
A pink 'Submit' button is located at the bottom of the form.

1. Click on the magnifying glass next to the Title field.



This close-up shows the 'Title \*' field. The magnifying glass icon on the right side of the input box is highlighted with a red square, indicating where to click to activate the search function.

2. Type the personal title you want to look for into the box (e.g. Mr, Mrs, Miss, Mx etc.) and press enter.



This screenshot shows the search dropdown menu for the Title field. A tooltip at the top reads: 'To search on partial text, use the asterisk (\*) wildcard character.' The search input contains 'Mr' and has a magnifying glass icon on the right. Below the input, a dropdown list shows 'Title' with an upward arrow next to it, indicating it is the selected or first result.

3. To choose the required one, click into the left column to add a tick, then press **Select**.

Lookup records

Mr

✓ Title ↑

✓ Mr

Mrs

Remove value

Select

Cancel

4. Complete the rest of the form with their details, then press **Submit** to save the record.

Create

Details

Title

Mr

First Name

Adam

Last Name \*

Smith-Clarke

Personal Email

A.SmithClarke@ageuktest.org.uk

Local Age UK User

Age UK Suffolk - Head Office

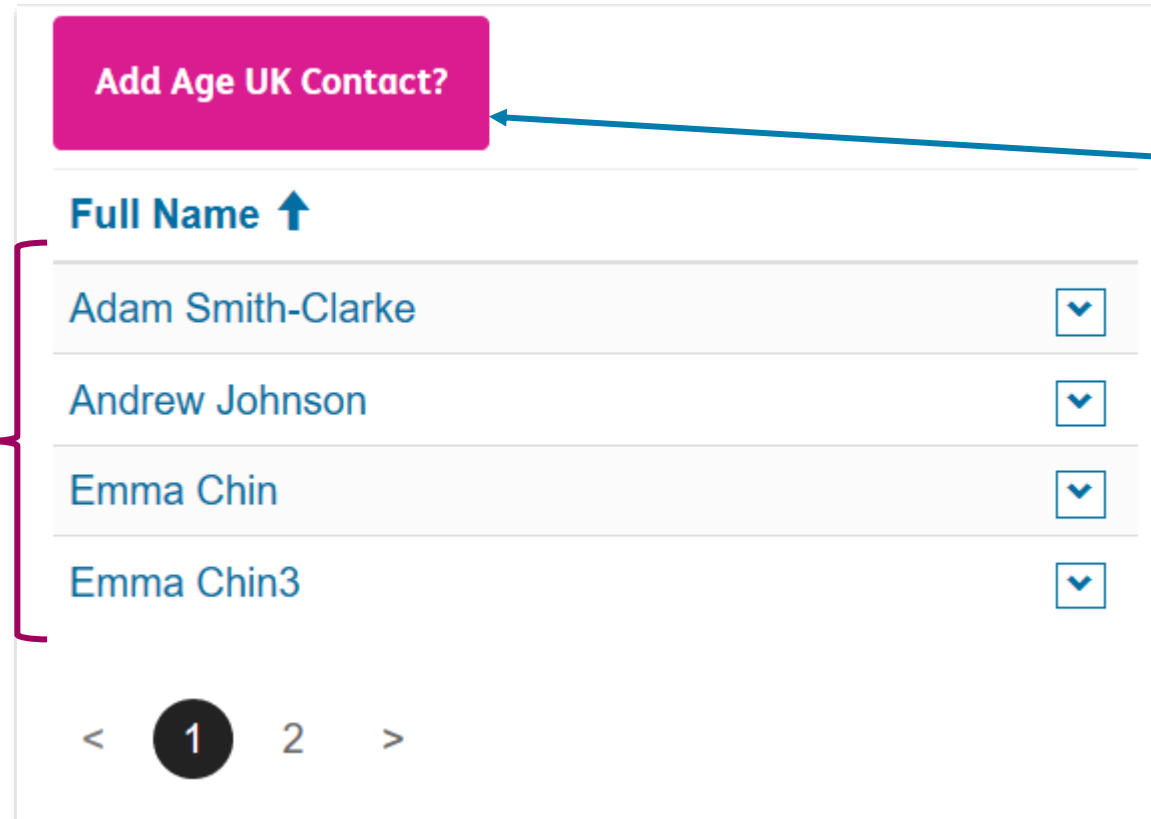
Submit

If at any point you wish to stop creating the record, click on the “X” on the top right corner.

# CHANGING YOUR CEO DETAILS

Firstly, you must check the existing staff list to see if there is an existing contact record for the individual.

*Click on the number or arrows at the bottom of the list to move through the pages.*



The screenshot shows a user interface for managing staff contacts. At the top, there is a pink button labeled "Add Age UK Contact?". Below this is a section titled "Full Name ↑" which contains a list of four names: "Adam Smith-Clarke", "Andrew Johnson", "Emma Chin", and "Emma Chin3". Each name is followed by a small blue square containing a white downward-pointing arrow. At the bottom of the list, there is a pagination control consisting of a left arrow, a circle containing the number "1", the number "2", and a right arrow. A blue arrow points from the text on the right to the pink button, and a purple bracket on the left encompasses the list of names.

If there isn't one, then press the **Add Age UK Contact** button.

Follow the instructions on [page 12](#) to complete the form.

**Staff details**

CEO name

Launch lookup

Now click on the magnifying glass to open the lookup option.

Type the name of the new CEO into the search box, then press the Enter key.

In the search results list, make sure there is a tick beside their name, then press the **'Select'** button.

The new CEO name will now appear in the box, but you'll need to press the **Save** button at the bottom of the page to ensure this update are stored on the record.

If you have made a mistake or need to remove the name within the field, press the **X** and this will clear the box. Then press the magnifying glass to start the search again.

To search on partial text, use the asterisk (\*) wildcard character.

am Smith-Clarke

✓ **Full Name** ↑ **Local Age UK User**

✓ Adam Smith-Clarke	Age UK Suffolk - Head Office
---------------------	------------------------------

**Staff details**

CEO name

**Full Name** ↑

Adam Smith-Clarke	<input type="button" value="Q"/>
Andrew Johnson	<input type="button" value="Q"/>
Emma Chin	<input type="button" value="Q"/>
Emma Chin3	<input type="button" value="Q"/>

< 1 2 >



In this field, you can type in the total number of older people you reached in the previous financial year.

### Number of People Reached April 2019 - March 2020

60

In this section, we need you to let us know whether you are using the new shops template on your website. The template allows us to pull them together into aggregated index pages.

- If you select **No**, then we will upgrade your shop information held in the Age UK website.
- If you select **Yes**, then we will add a redirect to your new shops pages.

### Is the new 2020 shops template(s) activated \*

No  Yes

For more information about the new templates, please refer to:  
<https://bp-digital-hub.ageuk.org.uk/creating-a-news-section-and-articles/>

# SYSTEMS

In this section, we are asking you to indicate which system(s) you use for several key functions, namely:

- (1) case, contact and rostering management.
- (2) HR
- (3) Finance.

We provided three spaces for each category, to ensure you have enough room to note down the different systems your organisation uses.

## Systems

The fields in this section are for Internal Use Only

### Case, Contact & Rostering (1) - what case, contact and rostering system do they use

Charity Log

### Case, Contact & Rostering (2)

Excel

### Case, Contact & Rostering (3)

### HR (1) - what HR system do they use

Microsoft Dynamics Talent

### HR (2)

### HR (3)

### Payroll - what payroll system do they use?

Microsoft Dynamics Talent

### Finance (1) - what finance system do they use?

Sage

### Finance (2)

### Finance (3)

This section also asks you to indicate which systems or suppliers you use for **payroll**, **retail**, **banking** and **direct debiting**.

Then finally we would like to know whether you use Charitylog or not.

<b>Retail Systems - what retail system do they use (if applicable)</b>
<input type="text"/>
<b>Banking - who do they bank with?</b>
<input type="text" value="Natwest"/>
<b>Direct Debiting - which direct debiting supplier do they use?</b>
<input type="text"/>
<b>Do they use CharityLog?</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No

Providing this information will support the further development of the Network Infrastructure Programme, enabling us to have a clearer understanding of the key systems and suppliers in use across the network.

This insight will give Age UK the opportunity to link Partners to promote peer to peer support.

# YOUR LOCATIONS / YOUR SHOPS

In this section, you will be able to see a list of existing records that contain data about the **Locations and Shops** you manage.

These lists are for reference only. So, if you want to view/ edit the record or add a new one, please see the guide entitled ***Locations and Shops*** for the steps on how to do this.

The screenshot displays two data tables. The first table, 'Your locations', has four rows of data. The second table, 'Your Shops', has four rows of data. Both tables have columns for 'Organisation Name', 'Modified On', and 'Modified By'. The 'Your locations' table includes a pagination control showing page 1 of 5. The 'Your Shops' table includes a pagination control showing page 1 of 2.

Organisation Name ↑	Modified On	Modified By
Local Age UK - Leather Lane -	23/08/2018 5:23 PM	SYSTEM
Local Age UK - Leather Lane -	23/08/2018 5:28 PM	SYSTEM
Local Age UK - Leather Lane -	23/08/2018 5:36 PM	SYSTEM
Local Age UK - Leather Lane -	24/08/2018 9:26 AM	SYSTEM

< 1 2 3 4 5 >

Organisation Name ↑	Modified On	Modified By
11111111111111111111111111111111	10/09/2018 9:27 AM	Yang Liu
22222222	30/08/2018 11:38 AM	Tril Gurung
Age UK Red Lion Street - Shop	30/08/2018 11:40 AM	Yang Liu
Barbershop	30/08/2018 11:40 AM	Yang Liu

< 1 2 >

# RECORDS THAT HAVE NOT BEEN UPDATED IN PAST 6 MONTHS

The information listed under this section represent records that have not been updated in the last six months. These reference lists will give you the opportunity to see which records need to be reviewed to ensure the information is still current.

As these records are published to the local directory, it is vital you keep the information on them up to date so that we are sharing the correct information with the public.

### Records not updated in last 6 months

Shops		Locations	
Organisation Name ↑	Modified On	Organisation Name ↑	Modified On
11111111111111111111	18/10/2018 2:36 PM	Local Age UK - Leather Lane -	05/06/2019 2:53 PM
Barbershop	30/08/2018 11:40 AM	Local Age UK - Leather Lane -	23/08/2018 5:23 PM
Shop Test 4	30/08/2018 11:40 AM	Local Age UK - Leather Lane -	23/08/2018 5:28 PM
Test shop no category	18/10/2018 2:11 PM	Local Age UK - Leather Lane -	23/08/2018 5:36 PM

< 1 2 3 4 5 6 >

Signpost		Services		
Organisation Name ↑	Modified On	Service Name ↑	Organisation	Modified On
23sefdf	29/08/2018 12:17 PM	Reading	Test shop no category	23/11/2018 3:47 PM
eeeeeeeeeeeee	29/08/2018 12:15 PM	teleteet	123testing	05/09/2018 3:22 PM
Hello 123	02/08/2018 4:01 PM			
hgf	29/08/2018 12:21 PM			

< 1 2 3 4 >

Events		
Event ID ↑	Run by Age UK?	Modified On
aaaaaaaaaaaaaaaaaaa	No	03/09/2018 12:04 PM

Please note, the columns entitled Organisation Name, Service Name and Event ID will contain the record name

If all of your records are up to date, then no records will be listed and the view will look like this.

### Records not updated in last 6 months

Shops		Locations	
Organisation Name ↑	Modified On	Organisation Name ↑	Modified On
There are no records to display.		There are no records to display.	

Signpost		Services		
Organisation Name ↑	Modified On	Service Name ↑	Organisation	Modified On
There are no records to display.		There are no records to display.		

Events		
Event ID ↑	Run by Age UK?	Modified On
There are no records to display.		

**SAVE**

Once you have finished reviewing all of the information on the Organisation Information record, press the **Save** button to store any changes you've made.

# QUALITY QUESTIONNAIRE

## **Serious incidents or critical issues**

This section asks you to indicate whether any serious incidents or critical issues have occurred in your organisation within the last year and describes who you should inform at Age UK.

Your answers not only help us to follow up with your organisation and offer support, but also helps us monitor any patterns of incident types occurring in the network and explore where we may need to offer additional guidance and support to address these issues.

Please review this section with your board of trustees and submit your responses as part of your CQS Annual Return.

- All serious incidents and / or critical issues should be reported immediately to Age UK, via the Partner helpdesk - [partnership@ageuk.org.uk](mailto:partnership@ageuk.org.uk).
- Further guidance can be found in the '[Managing and Reporting a Serious Incident](#)' document.

## **Completing this section:**

In this section, we ask you to indicate if an incident or 'critical issue' has occurred in the last twelve months.

Most of these questions require a 'yes' or 'no' answer, but some also include an 'N/A' option (i.e. 'not applicable') to use if this situation didn't occur or isn't relevant.

## Our Quality

### Serious Incidents & Critical Issues

In this section, we ask you to indicate if an incident or 'critical issue' has occurred in the past 12 months. Your answers help us monitor any patterns of incident type occurring in the network and explore where we may need to offer additional guidance and support to address these issues.

#### Immediate action: Do you need to report an incident and/or critical issue immediately?

Yes  No  N/A

Some questions include an 'N/A' option (i.e. 'not applicable') to use if this situation didn't occur in the past year or isn't relevant. Please only select N/A in the grid where the question offers it as an option. In the last 12 months, at our organisation:

#### The Trustee Board has made a Serious Incident Report to the Charity Commission

Yes  No

#### A trustee has been convicted for an offence involving dishonesty or deception

Yes  No

#### A trustee has been disqualified from being a company director

Yes  No

#### An investigation has been undertaken by the Charity Commission

Yes  No

#### A trustee has been declared bankrupt

Yes  No

#### A trustee has been removed by the Charity Commission or high court due to misconduct or mismanagement

Yes  No

#### An employment tribunal has been won by a member of staff

Yes  No

#### There has been an attempted fraud by an external party - online/email, please detail the amount below

Yes  No

#### An investigation visit has been undertaken by the Health & Safety Executive

Yes  No

#### An allegation of unlawful discrimination has been made

Yes  No  N/A

#### The organisation has reported a data breach to the Information Commissioner's Office

Yes  No  N/A

#### If you have indicated that an incident or critical issue has occurred, please describe

Submit

If you have any questions about information on this page, please get in contact at [partnership@ageuk.org.uk](mailto:partnership@ageuk.org.uk)

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#### An investigation has been undertaken / is ongoing into internal financial impropriety

Yes  No

#### A safeguarding allegation has been upheld against a member of staff, volunteer or trustee

Yes  No  N/A

#### An investigation visit has been undertaken by the local authority regarding food hygiene

Yes  No  N/A

#### An equal opportunities discrimination case has been upheld

Yes  No  N/A

#### An investigation has been undertaken by the Information Commissioner's Office

Yes  No  N/A



# 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](mailto:BSupportAdmin@ageuk.org.uk).

