

BRAND PARTNER PORTAL

Locations and Shops.



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LOCATIONS

Within the “**My Portal**” area of the application, details about the offices and venues your organisation uses to provide events are held within the “**Our Locations**” work area.

LOCATIONS

To access this area of the portal, first click on the “My Portal” tile, followed by **Our Locations**.

The image shows a screenshot of the Age UK portal interface. On the left, a smaller view of the portal's main menu is shown, with the 'My Portal' tile highlighted by a red box. A red arrow points from this tile to a larger, detailed view of the 'My Portal' page on the right. In this larger view, the 'Our Locations' tile is also highlighted with a red box. The 'Our Locations' tile contains the text: 'Sub offices and venues where our services and events take place'. Other tiles visible in the 'My Portal' view include 'Our Organisation Info', 'Our Shops', 'Services We Deliver', 'Our Community Signposts', and 'Our Events & Activities'. A note at the bottom of the left panel states: 'NOTE: My Portal and Bulk Orders are still in development'. Below this, it says 'Need help? We will soon be creating a page on The Loop and also on the BP Digital Hub.' The footer contains links for 'Linking Policy', 'Terms and conditions', 'Privacy policy', 'Publications', 'Cookies', 'Safeguarding', 'About us', 'Sitemap', and 'Contact Us'. It also includes the Age UK logo and contact information: 'Age UK, Tavistock House, 1-6 Tavistock Square, London WC1H 9NA. Registered charity number 1138297. Company number 5825798. © Age UK Group and/or its National Partners (Age NI, Age Cymru) 2020. All Rights Reserved.'

The page will refresh, listing the location records currently held in our systems.

From this page you will be able to create a new location record, view existing location records and edit these if required.

Home > My Portal > Our Locations

Our Locations

Please note: This list represents **offices** and **not** shops.

CREATE A NEW LOCATION

Active Locations

Organisation Name ↑	Modified On	Modified By	
Age UK Test - Head Office - St Helens Office	05/08/2020 1:11 PM	SYSTEM	▼
Age UK Test - Head Office - Vineyard Centre	05/08/2020 1:13 PM	SYSTEM	▼

If you have any questions about information on this page, please get in contact at partnership@ageuk.org.uk

View details

Edit

Active Locations

Active Locations

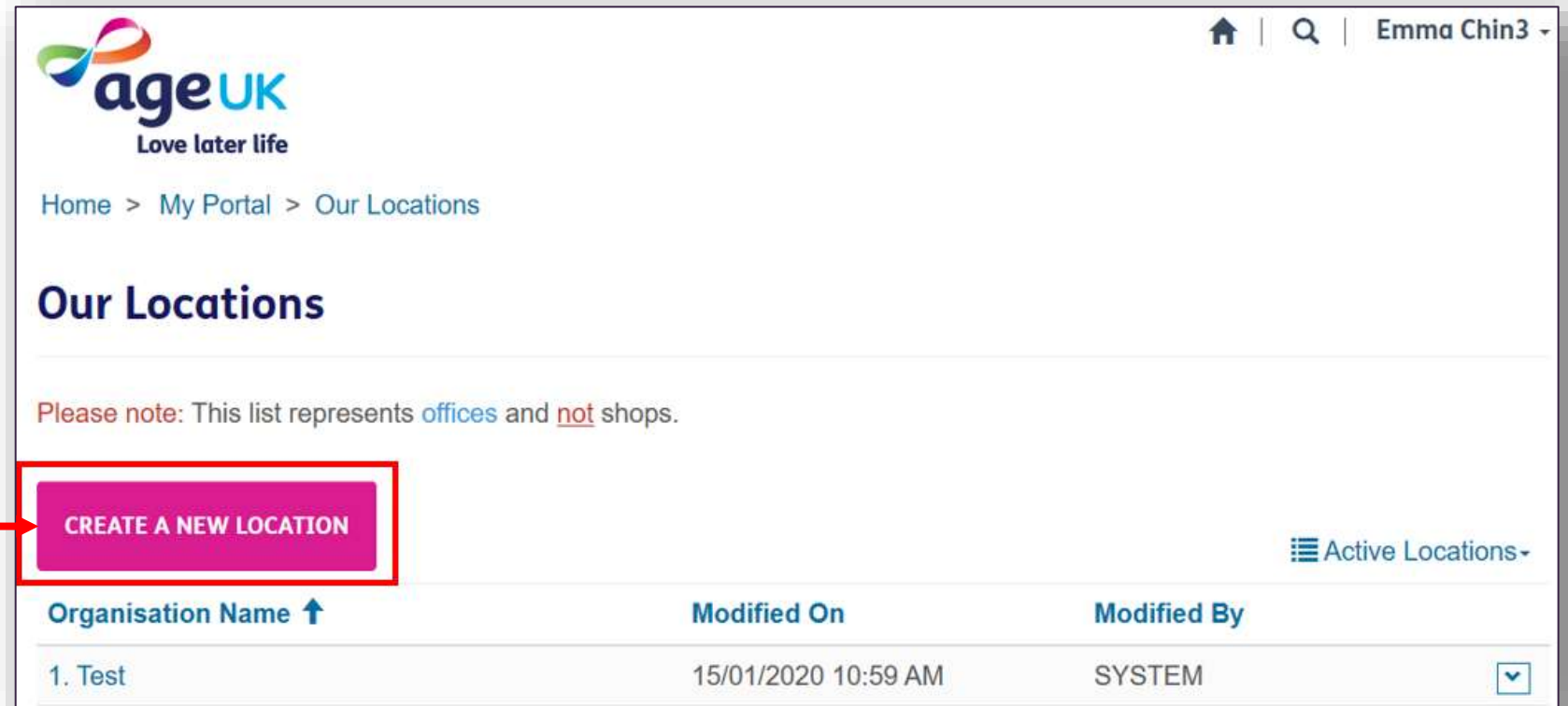
Inactive Locations

By default, you will see a list of **active records** (*live records that are visible in search results and can be edited*).

However if needed, you can change the view to see all of the **inactive records** (*these are records that have been hidden from any active search list and cannot be edited*).

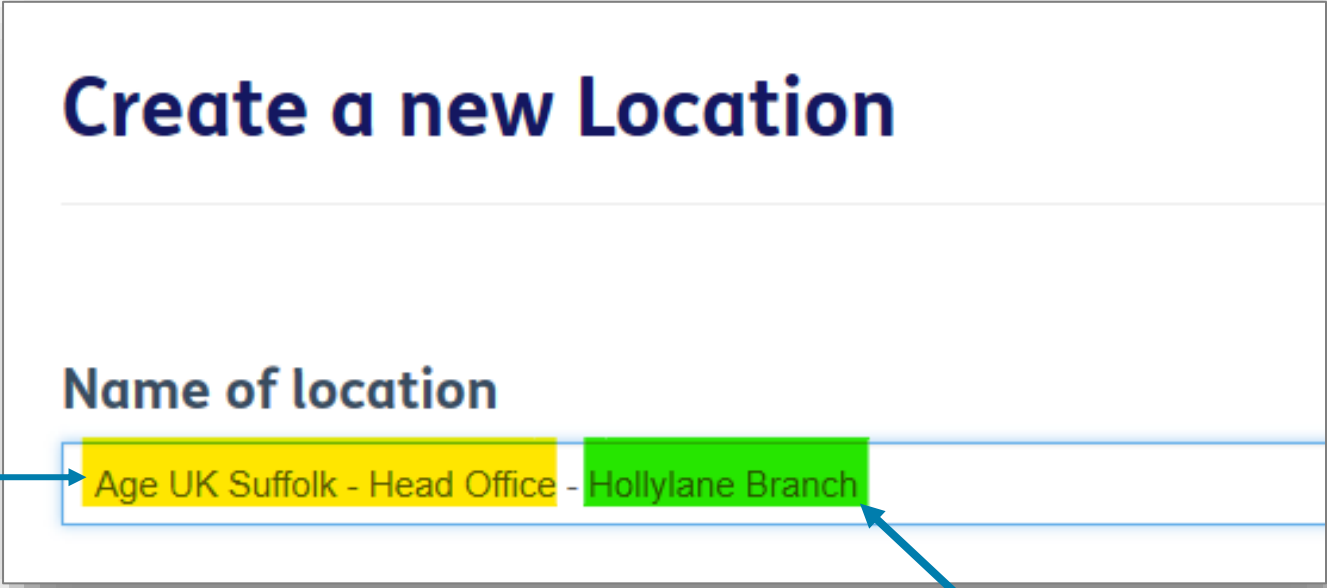
CREATING A NEW LOCATION

To create a new location record, you will need to click the “**Create A New Location**” button.



A blank form will appear on your screen for you to complete.

The “**Name of Location**” field is pre-populated with the name of your organisation.



The screenshot shows a form titled "Create a new Location". Below the title is a large empty text area. Further down is a label "Name of location" followed by a text input field. The input field contains the text "Age UK Suffolk - Head Office - Hollylane Branch". The text is split into two colored segments: "Age UK Suffolk - Head Office" is highlighted in yellow, and "Hollylane Branch" is highlighted in green. A blue arrow points from the yellow segment to the left, and another blue arrow points from the green segment to the right.

The reason for this is to ensure that the naming format is consistent throughout for all Location **records**.

Note: The text in the “Name of Location” field must NOT be deleted or modified.

You will only need to add the branch name to the end.

There are a number of other fields that you can fill in with information about this location. Any marked with a red asterisk “*” is considered a mandatory field and must be completed before you can move onto the next page.

*At any point, if you wish to cancel and discard the changes, just press the “**Our Locations**” link at the top of the form.*

ageUK
Love later life

Home > My Portal > Our Locations > Create a new Location

Create a new Location

Name of location
Age UK Anytown - Head Office - Drop in Centre

Postcode *
To update address, search for the postcode below:
W11 0AH

Contact telephone number *
Please enter a telephone number:
0123456789

Address
Address will be populated once saved.

Website address

Contact email address *

Branch office (Internal Use Only) *
☐ Yes * ☒ No

Site visibility (Internal Use Only) *
Please select the classification(s) that are applicable to this location. This will determine how it's grouped on the Local Directory:
* Public walk-in ☐ Private office ☐ Appointment only

Site accessibility

Wheelchair access ramp
☐ No * ☒ Yes

Step-Free Access
☐ No * ☒ Yes

Toilets
☐ No * ☒ Yes
If you want to add additional Site Accessibility options, please email partnership@ageuk.org.uk

Opening times *

Local Age UK
Age UK Anytown - Head Office

Organisation type
Location

NEXT

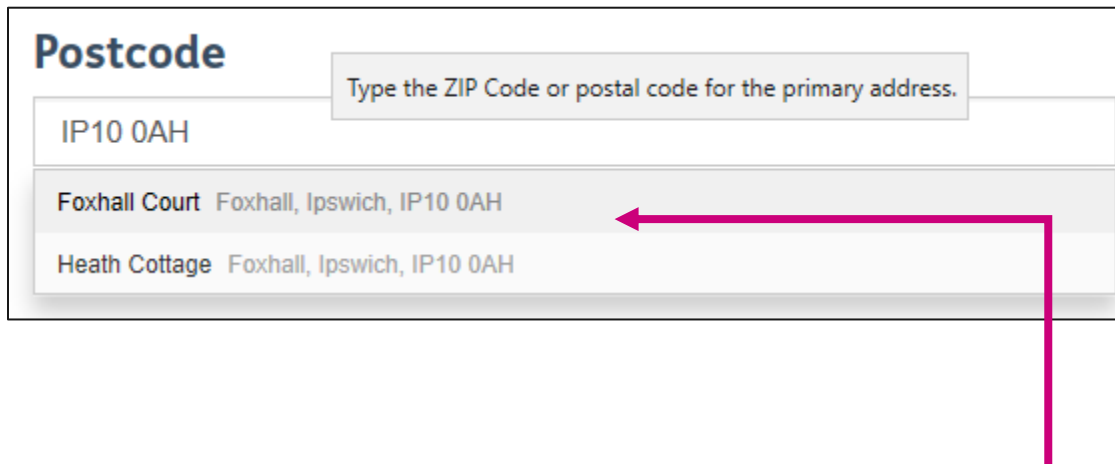
If you have any questions about information on this page, please get in contact at partnership@ageuk.org.uk

Looking Policy Terms and conditions Privacy policy Publications Cookies Safeguarding About Us Sitemap Contact Us
Age UK, 55 to 59, 1-6 Southwark Square, London WC7N 4BA. Registered charity number 1126007. Company number 0231786. © Age UK Group limited to National Partners (Age UK, Age Scotland and Age Cymru) 2021. All Rights Reserved.

An address must be added to the record for this location as our local directory uses the postcode to calculate the proximity of a enquirers address to this office or venue. Within the portal, you have two ways in which you can add an address:

1. Using the Postcode field.

a) Click into the Postcode field, and type in the details you have.



The screenshot shows a web form titled 'Postcode'. Below the title is a text input field containing 'IP10 0AH'. A light grey tooltip box is positioned above the input field, containing the text 'Type the ZIP Code or postal code for the primary address.' Below the input field, there is a list of search results. The first result is 'Foxhall Court Foxhall, Ipswich, IP10 0AH' and the second is 'Heath Cottage Foxhall, Ipswich, IP10 0AH'. A red arrow points from the right side of the input field to the first search result line.

b) 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.

The system will then apply the fully address information in the Main Address box once you save the record.

Using 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 type the details into each address line.

The screenshot shows a mobile application interface. At the top, there is a 'Main address' box containing the text 'Unit 14 Hillview Business Park Old Ipswich Road' and 'IPSWICH IP6 0AJ'. Below this, a form is displayed with several input fields. A pink arrow points from the text 'Doing so will display the address form...' to the 'City' field. Another pink arrow points from the text 'When you have finished, press Done.' to the 'Done' button. The form fields are labeled as follows:

- Image URL** (empty field)
- Address line 1** (containing 'Unit 14')
- Address line 2** (containing 'Hillview Business Park')
- Address line 3** (containing 'Old Ipswich Road')
- City** (containing 'IPSWICH')
- State/Province** (empty field)
- ZIP/Postal code** (containing 'IP6 0AJ')
- Country/Region** (empty field)
- Done** (pink button)

When you have finished, press **Done**.

Contact telephone number *

Please enter a telephone number:

01234567890



Within the telephone field, type in the main phone number that you want the public to use to contact this office/ venue.

Within this field, add the website address that you want to have listed on this location page in the Age UK Local Directory.

Website address

www.ageuksuffolktest.org



Website address

<http://www.ageuksuffolktest.org>

Once you have typed in the full address, the system will apply the **http** prefix.

Contact email address *

info@ageuksuffolktest.org.uk

Within the Contact email address field, type in the main email address that you want the public to use to contact this office/ venue.

In the portal, location records serve a dual purpose so you can use the Branch Office section to indicate whether the record is for:

- one of your branch offices (then select **Yes**)
- another type of location you use such as a venue where you host a regular event (then select **No**).

Branch office (Internal Use Only) *

☒ Yes ☐ No

Site visibility (Internal Use Only) *

Please select the classification(s) that are applicable to this location. This will determine how it's grouped on the Local Directory:

☒ Public walk-in ☐ Private office ☐ Appointment only

Site visibility indicates whether this location can be accessed by the public or if it is a private office. It's important that you select an option here, as this controls whether we display the address details on our Local Directory pages.

If you are happy for address information to be displayed on our local directory pages, then select **Public Walk**.

If you would prefer to keep the address information hidden and to only be used internally, then select either **Private Office** or **Appointment**.

Within this section, indicate what accessibility options are available to the public if they visit this office/ venue.

If there are any other options that you wish to add, send an email to BSupportAdmin@ageuk.org.uk

Site accessibility

Wheelchair access ramp

☒ No ☐ Yes

Step-Free Access

☒ No ☐ Yes

Toilets

☒ No ☐ Yes

Finally, type in the opening times associated with this location. You can use either the 12 or 24 hour clock format, as long as it is consistent across all records you add to the portal.

The screenshot shows a form titled "Local Age UK" with the subtitle "Age UK Suffolk - Head Office". The form contains two main sections: "Opening times *" and "Organisation type". The "Opening times *" section has a text input field containing "9am - 1pm". The "Organisation type" section has a label "Location" and a text input field. A blue line starts from the right side of the "Opening times" input field, goes down, and then left to point at the "NEXT" button, which is a pink rectangular button with the text "NEXT" in white.

Once you have completed the form, click “**Next**” to move onto the next page.

If the location you are adding is associated with any of the services you deliver, then you will need to add a **Service Category**. Doing so will ensure the location record appears in the search results, if anyone types a keyword in the Local Directory.

See [appendix 1](#) for further information.

ageUK
Love later life

Home > My Portal > Our Locations > Create a new Location > Select Categories

Select Categories

By category we mean your service category. Please select as many as are required.

ADD A SERVICE CATEGORY

Subcategory ↑	Category
There are no records to display.	

SAVE

Lookup records

Search

✓ Subcategory ↑	Category
1:1 support	Computers/phones/tablets
✓ Accessing the internet	Computers/phones/tablets
Adjustable beds	Helpful equipment
Advocacy	Information, advice and advocacy
Age UK Structure & Work	Administration

< 1 2 3 4 5 6 7 8 >

Selected records

Classes ✕ 1:1 support ✕ Accessing the internet ✕

Add Cancel

Scroll through the list, and click on the left column to select the categories you want. You can select more than one at a time, and all selected records will appear within the selected records grid.

Once you've selected all of the required records, press **Add**.

When you have finished adding these records, press the **Save** button.

Home > My Portal > Our Locations > Create a new Location > Select Categories

Select Categories

By category we mean your service category. Please select as many as are required.

ADD A SERVICE CATEGORY

Subcategory ↑	Category
1:1 support	Computers/phones/tablets
Accessing the internet	Computers/phones/tablets
Classes	Computers/phones/tablets

SAVE

An confirmation window will appear, and if you are happy with the changes made, then press **Ok** in the confirmation window.

Submit

Are you sure you would like to save these changes?

Ok Cancel

If the record has saved successfully, the page will refresh to show a green banner with the word **Saved**.

Home > My Portal > Our Locations > Create a new Location > Select Categories

Select Categories

By category we mean your service category. Please select as many as are required.

Saved

To navigate out of this page, press the **Our Locations** link at the top.

VIEWING AND EDITING EXISTING LOCATION RECORDS

There are two ways you can view an existing location record:

The screenshot shows the 'Our Locations' page on the ageUK portal. The page includes a header with the ageUK logo and a user profile 'Emma Chin3'. A breadcrumb trail reads 'Home > My Portal > Our Locations'. Below the header, there is a pink button labeled 'CREATE A NEW LOCATION' and a link 'Active Locations'. A table lists location records with columns for 'Organisation Name', 'Modified On', and 'Modified By'. The first row is highlighted in yellow and has a dropdown menu open, showing 'View details' and 'Edit' options.

Organisation Name ↑	Modified On	Modified By
001. Test Location	17/01/2020 11:44 AM	SYSTEM
1. Test	15/01/2020 10:59 AM	SYSTEM

Firstly, you can click on the **organisation name** to view the location record (1).

Or you can click on the drop-down arrow and select “**View Details**” (2).

Using either of the aforementioned methods to open an existing record will present you with a ‘**Read Only**’ version of the form.

View details

X

Name of location

Age UK Anytown - Carrington Cottage

Postcode

TW10 5AA

Contact telephone number *

01239874560

Address

1 Old Forge Cottages Carrington Road
Richmond TW10 5AA
United Kingdom

Website address

—

Contact email address

info@ageukanytown.org

Branch office (Internal Use Only) *


☐ Yes ☒ No

Site visibility (Internal Use Only) *

☐ Public walk-in ☐ Private office ☒ Appointment only

Site accessibility

If you need to edit an existing record, click on the drop-down arrow to the right of the location name, and select “**Edit**”.


Emma Chin3 -

[Home](#) > [My Portal](#) > [Our Locations](#)

Our Locations

Please note: This list represents [offices](#) and [not](#) shops.

[CREATE A NEW LOCATION](#)
Active Locations -

Organisation Name ↑	Modified On	Modified By	
001. Test Location	17/01/2020 11:44 AM	SYSTEM	▼
1. Test	15/01/2020 10:59 AM	SYSTEM	View details Edit

On the '**Edit**' form, the fields will be unlocked so you can modify the information associated with that location.

Edit

Name of location

Age UK Anytown - Carrington Cottage

Postcode *

To update address, search for the postcode below:

TW10 5AA

Contact telephone number *

Please enter a telephone number:

01239874560

Address

Address will be populated once saved.

1 Old Forge Cottages Carrington Road
Richmond TW10 5AA
United Kingdom

Website address

Contact email address *

info@ageukanytown.org

Branch office (Internal Use Only) *

☐ Yes ☒ No

Site visibility *


There are two ways in which you can amend the address information:

Using the Postcode Field

- Click into the postcode field and delete the text in there.
- Type in the new postcode.
- As you do so, the system will list addresses associated with the postcode.
- Click on the required one.
- When you save the form, the address box will be updated.

Using the Address box.

- Click into the address box.
- All the address fields will be visible, so you can click into each address line and edit them manually.
- Once you have finished, press the **“Done”** button.

 Edit

Site accessibility

Wheelchair access ramp
☒ No ☐ Yes

Step-Free Access
☒ No ☐ Yes

Toilets
☒ No ☐ Yes
 If you want to add additional Site Accessibility options, please email partnership@ageuk.org.uk

Opening times

Local Age UK
 Age UK Camden - Head Office


Organisation type
 Location

Further down you will be able to edit the site accessibility options, as well as the opening times of the location.

You can also amend the service categories tagged to this record, either by :

- (1) Pressing **Add a Service Category** button to add a new one.
- (2) Pressing the down arrow beside the existing one and selecting **Remove**.

ADD A SERVICE CATEGORY


Subcategory ↑	Category
Bowling	Exercise/physical activity  <div>REMOVE</div>

When you have finished updating the form, press the **Save** button (at the bottom the page).

- If you want to cancel the changes you've made, just press the 'x' at the top right hand corner of the form.

Whilst in edit mode, you can “close” a location record by pressing the ‘**Mark as Inactive**’ button.





Home > My Portal > Our Locations

Our Locations

Please note: This list represents **offices** and **not** shops.

CREATE A NEW LOCATION

Organisation Name ↑	Modified On	Modified By	
001. Test Location	17/01/2020 11:44 AM	SYSTEM	<div>Active Locations ▾<div>Active LocationsInactive Locations</div></div>

This will remove the record from any active search lists, both in the portal and on the Age UK website.

You will still be able to view these records (*if required*) by pressing the down arrow beside the word *Active Locations*. From the dropdown list, select the **Inactive Locations** view.

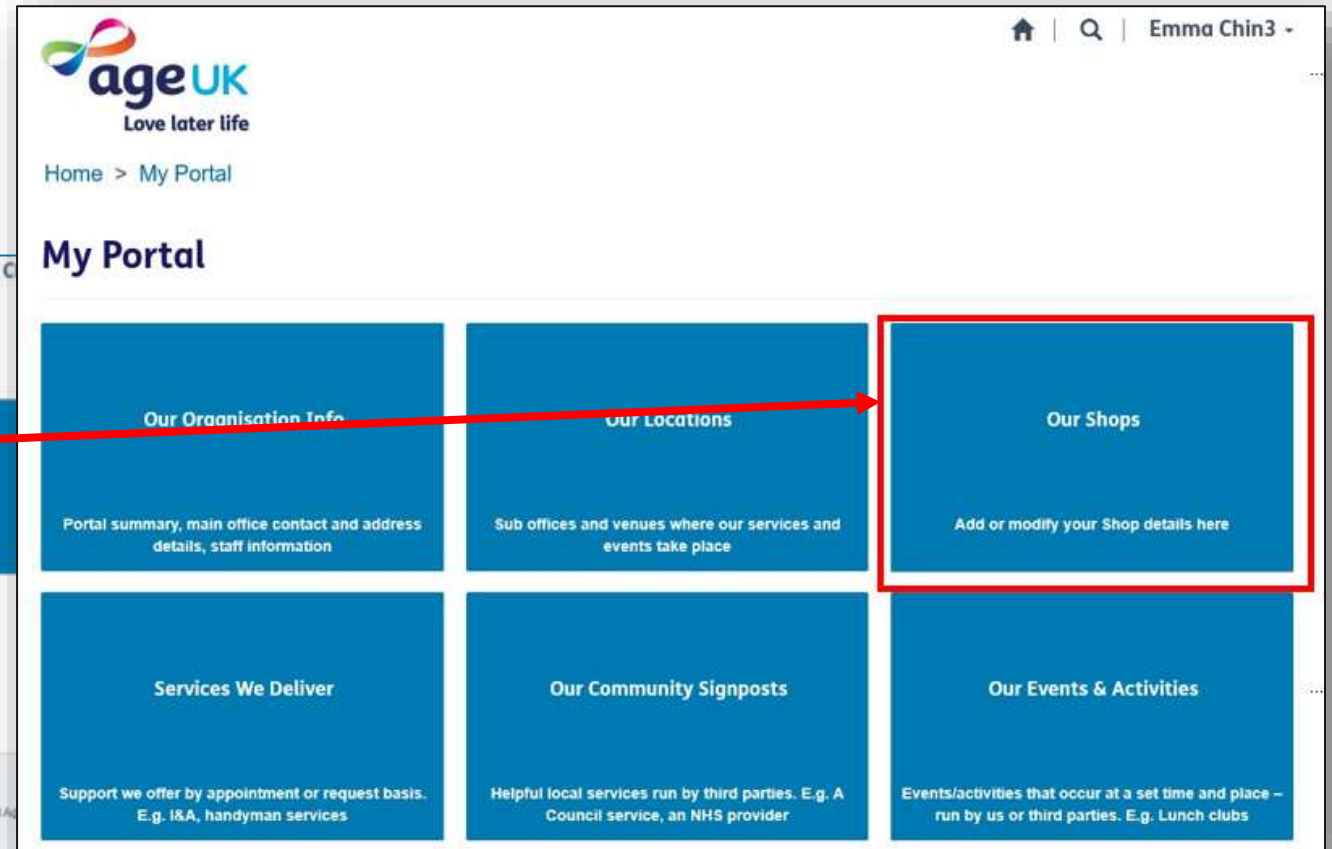
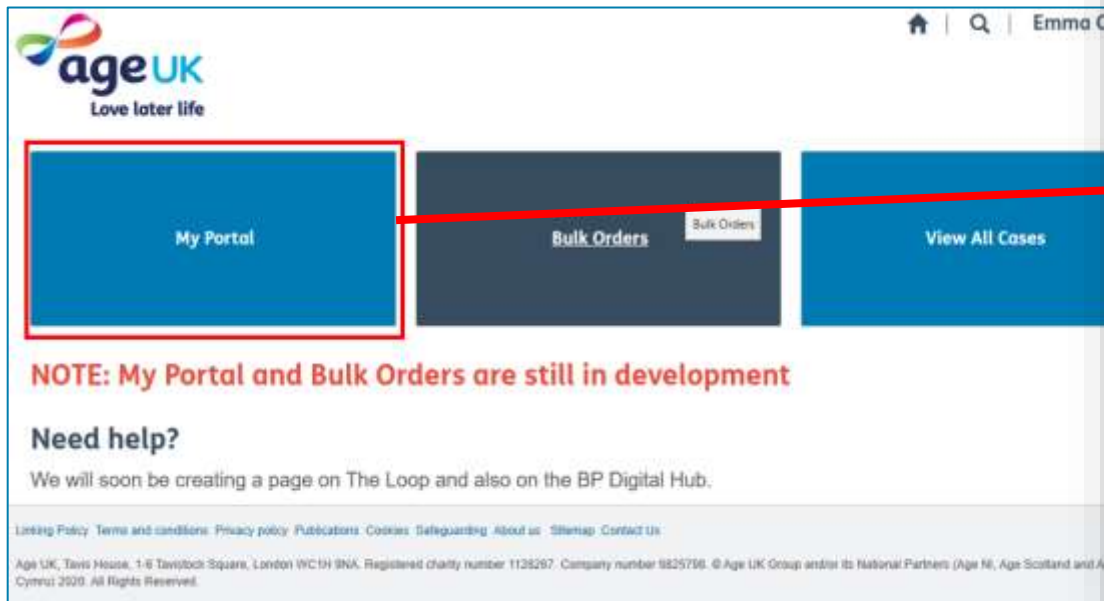
SHOPS

Within the “**My Portal**” area of the application, all the shops managed by your organisation will be listed within the “**Our Shops**” section.



SHOPS

If you manage any shops, you can find and manage the records for these by clicking the “My Portal” tile, followed by **Our Shops**.



By default, you will see a list of **active shop records** (*live records that are visible in search results and can be edited*).



Home > My Portal > Our Shops

Our Shops

CREATE NEW SHOP

Organisation Name ↑	Modified On	Modified By
Age UK Suffolk - Head Office - Test Shop	12/02/2020 5:12 PM	SYSTEM

Active Shops

Active Shops

Inactive Shops

However if needed, you can change the view to see all of the **inactive records** associated with your organisation (*records that have been hidden from any active search list and cannot be edited*).

CREATING A NEW SHOP

To create a new Shop record, click the “**Create New Shop**” button.



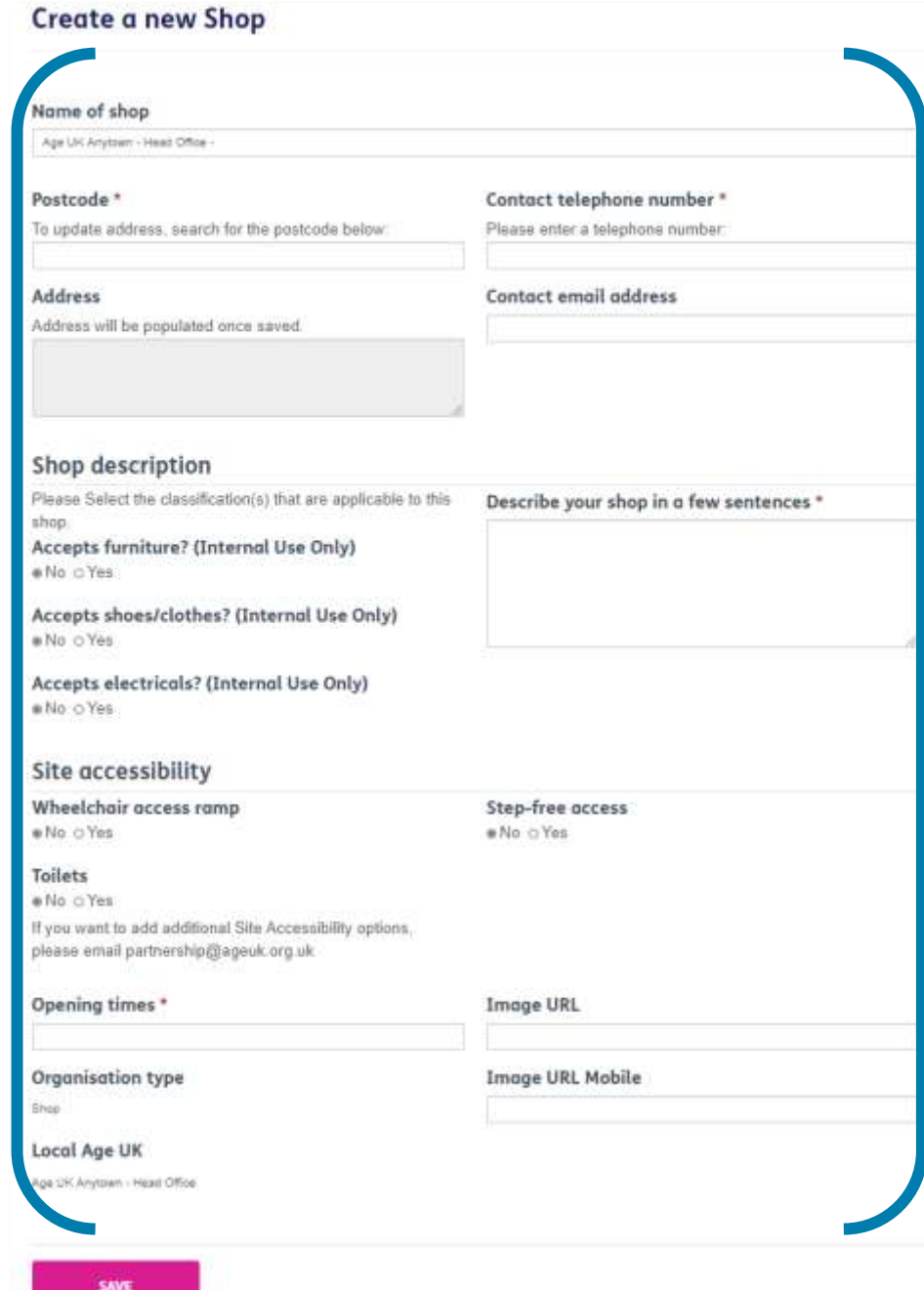
The screenshot shows the Age UK 'Our Shops' page. At the top left is the Age UK logo with the tagline 'Love later life'. At the top right are navigation icons for home, search, and a user profile 'Emma Chin3'. Below the logo is a breadcrumb trail: 'Home > My Portal > Our Shops'. The main heading is 'Our Shops'. A prominent pink button labeled 'CREATE NEW SHOP' is positioned on the left. To its right is a link 'Active Shops' with a dropdown arrow. Below these elements is a table with three columns: 'Organisation Name' (with an upward arrow), 'Modified On', and 'Modified By'. The first row of the table contains the text 'Age UK Ashford shop - High Street', the date '16/12/2019 3:02 PM', and the user 'SYSTEM'. A small dropdown arrow is visible at the end of the first row.

Organisation Name ↑	Modified On	Modified By
Age UK Ashford shop - High Street	16/12/2019 3:02 PM	SYSTEM

A blank form will appear on your screen for you to complete.

There are a number of fields on the form that you can fill in with information about the shop.

Any marked with a red asterisk “*” is considered a mandatory field and must be completed before you can move onto the next page.



Create a new Shop

Name of shop
Age UK Anytown - Head Office

Postcode *
To update address, search for the postcode below:

Contact telephone number *
Please enter a telephone number:

Address
Address will be populated once saved.

Contact email address

Shop description
Please Select the classification(s) that are applicable to this shop.

Accepts furniture? (Internal Use Only)
☐ No ☐ Yes

Accepts shoes/clothes? (Internal Use Only)
☐ No ☐ Yes

Accepts electricals? (Internal Use Only)
☐ No ☐ Yes

Describe your shop in a few sentences *

Site accessibility

Wheelchair access ramp
☐ No ☐ Yes

Step-free access
☐ No ☐ Yes

Toilets
☐ No ☐ Yes
If you want to add additional Site Accessibility options, please email partnership@ageuk.org.uk

Opening times *

Image URL

Organisation type
Shop

Image URL Mobile

Local Age UK
Age UK Anytown - Head Office

SAVE

When you have finished updating the form, press the **Save** button (at the bottom of the page).

If you want to cancel the changes you've made, just press the 'x' at the top right hand corner of the form.

VIEWING AND EDITING EXISTING SHOPS

There are two ways a user can view an existing shop record.

Firstly, you can click on the **organisation name** to open the record (1).

The screenshot shows the Age UK 'Our Shops' page. At the top is the Age UK logo with the tagline 'Love later life'. Below it is a breadcrumb trail: 'Home > My Portal > Our Shops'. The main heading is 'Our Shops'. There is a pink button labeled 'CREATE NEW SHOP' and a link 'Active Shops' with a dropdown arrow. Below these is a table with three columns: 'Organisation Name', 'Modified On', and 'Modified By'. The table has two rows of data. A red arrow points from the text 'organisation name' to the first row of the table.

Organisation Name ↑	Modified On	Modified By
Age UK Ashford shop - High Street	16/12/2019 3:02 PM	SYSTEM
Age UK · Cockfosters Avenue	16/12/2019 4:46 PM	SYSTEM

Alternatively, you can click on the drop-down arrow and select “**View Details**” (2).

Using either of the methods will present you with a **‘Read Only’** version.

View details

X

Name of shop

2210 Shop

Postcode

WC2A 1AF

Contact telephone number *

02075886001

Address

Flat 1 68 Chancery Lane
London WC2A 1AF
United Kingdom

Contact email address

[contactemail@test.com](#)

Shop description

Accepts furniture? (Internal Use Only)

☐ No ☒ Yes

Accepts shoes/clothes? (Internal Use Only)

☐ No ☒ Yes

Accepts electricals? (Internal Use Only)

☐ No ☒ Yes

Describe your shop in a few sentences *

Globally foster accurate methodologies whereas resource-leveling methodologies. Conveniently impact multifunctional benefits after client-based information. Dramatically evisculate cost effective web-readiness vis-a-vis excellent benefits. Monotonectally synergize inexpensive growth strategies.

View details

Site accessibility

Wheelchair access ramp

No

Yes

Toilets

No

Yes

If you want to add additional Site Accessibility options, please email partnership@ageuk.org.uk

Opening times

9-5

Organisation type

Shop

Local Age UK

Age UK Camden - Head Office

Step-free access

No

Yes

Image URL

https://www.dentistry.co.uk/wp-content/uploads/2019/05/Timer_766847608-e1558510702728-600x400.jpg

Image URL Mobile

https://www.dentistry.co.uk/wp-content/uploads/2019/05/Timer_766847608-e1558510702728-600x400.jpg

If you need to edit an existing record, click on the drop-down arrow to the right of the shop name, then select “Edit”.



Love later life

Home > My Portal > Our Shops

Our Shops

CREATE NEW SHOP

Active Shops

Organisation Name ↑	Modified On	Modified By	
2210 Shop	17/11/2020 1:00 PM	D365NPDSVRSETUP - Dynamics Server Setup	<div><div>View details</div><div>Edit</div></div>
Age UK Anytown - Denton Shop	24/11/2020 2:00 PM	D365NPDSVRSETUP - Dynamics Server Setup	

Within the edit version of the form, the fields will be unlocked so you can modify the information associated with that shop.

Edit

Name of shop

2210 Shop

Postcode *

To update address, search for the postcode below:

WC2A 1AF

Contact telephone number *

Please enter a telephone number:

02075886001

Address

Address will be populated once saved.

Flat 1 68 Chancery Lane
London WC2A 1AF
United Kingdom

Contact email address

contactemail@test.com

Shop description

Please select the classification(s) that are applicable to this shop.

Accepts furniture? (Internal Use Only)

☐ No ☒ Yes

Describe your shop in a few sentences *

Globally foster accurate methodologies whereas resource-leveling methodologies. Conveniently impact multifunctional benefits after client-based information. Dramatically

You will also be able to amend the service categories tagged to the shop, either by :

- (1) Pressing the **Add a Service Category** button to add a new one.
- (2) Pressing the down arrow beside the existing one and selecting **Remove**.

Edit

Sub Heading 4

Body Text 4

Objectively monetize cross functional alignments whereas pandemic best practices. Appropriately disseminate leading-edge results for standardized products. Rapidiously simplify long-term high-impact opportunities before global ROI. Phosfluorescently harness intermandated.

Key Link 4

ADD A SERVICE CATEGORY

Subcategory ↑	Category
Advocacy	Information, advice and advocacy

Subcategory ↑	Category
Advocacy	Information, advice and advocacy
Benefits and money	Information, advice


When you have finished editing, press the save button at the bottom of the page.

SAVE

Whilst in edit mode, you can “close” a shop record by pressing the ‘**Mark as Inactive**’ button.



This will remove the record from any active search lists both in the portal and on the Age UK website.



Home > My Portal > Our Shops

Our Shops

CREATE NEW SHOP

Organisation Name ↑	Modified On	Modified By
Age UK Ashford shop - High Street	16/12/2019 3:02 PM	SYSTEM

Active Shops

Active Shops

Inactive Shops

You will still be able to view these records (*if required*) by pressing the down arrow beside the word *Active Shops*.

From the dropdown list, select the **Inactive Shops** view.

APPENDICES

APPENDIX 1 : CATEGORY AND SUBCATEGORY LIST

One of the new features in the local directory will give visitors to the site the option to filter their searches based on the type of service they are looking for.

To achieve this, we've added a standardised list of service categories to the both the local directory and the portal.

When adding a new location/shop/service/signpost record, if you tag them with one or more service categories, then this will ensure they are included in any filtered searches.

The full list of current service categories can be found on the Partner Digital Hub, <https://bp-digital-hub.ageuk.org.uk/brand-partner-portal-guides/>

Lookup records		✕
<input type="text" value="Search"/>		<input type="button" value="Q"/>
✓ Subcategory ↑	Category	
1:1 support	Computers/phones/tablets	
Accessing the internet	Computers/phones/tablets	
Adjustable beds	Helpful equipment	
Advocacy	Information, advice and advocacy	
Arts and crafts	Socialising and activities	
< 1 2 3 4 5 6 7 8 >		

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.

