BRAND PARTNER PORTAL

Services We Deliver.
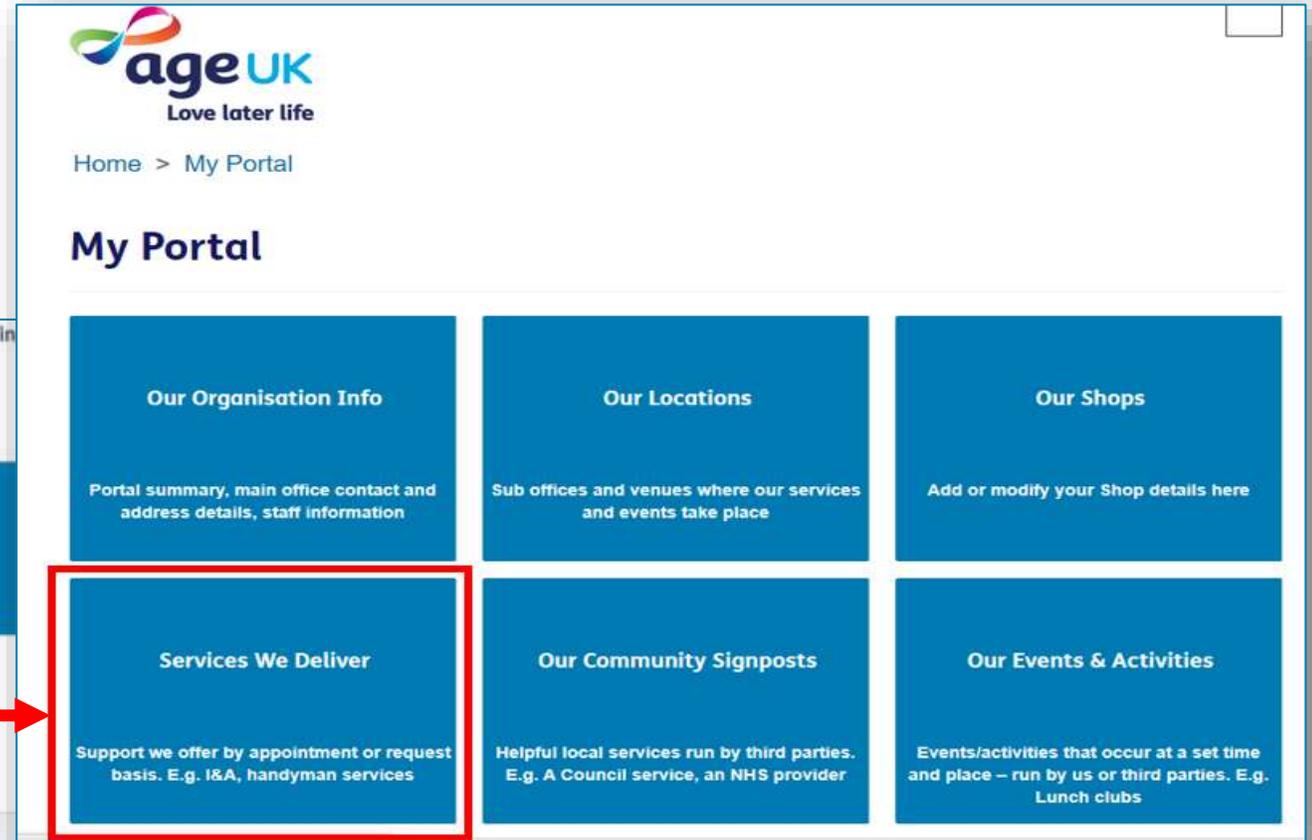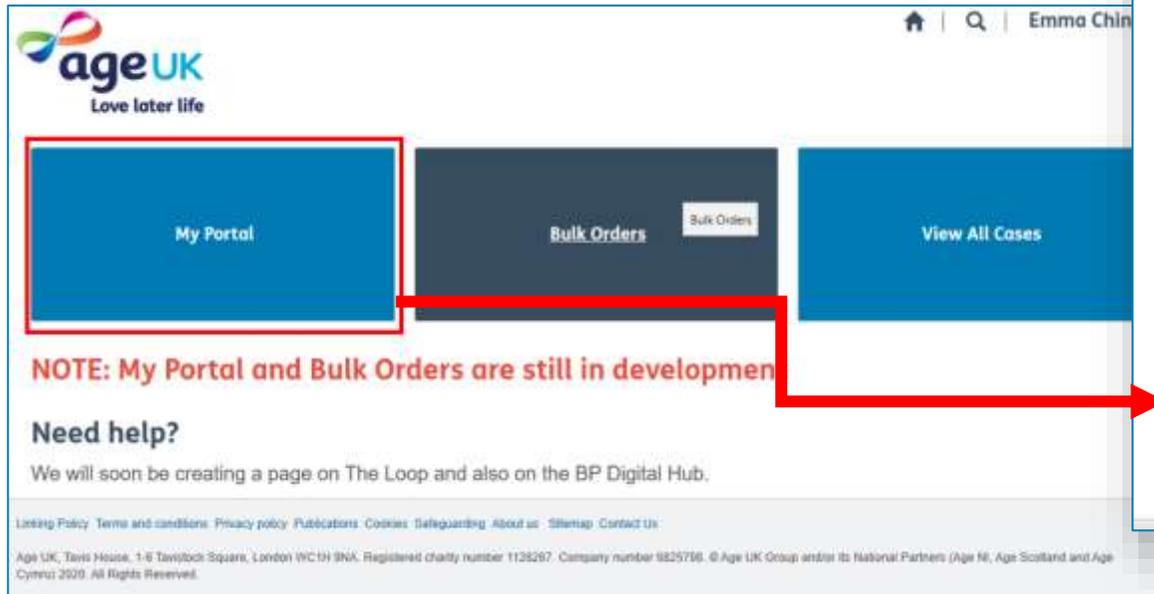
CONTENTS

INTRODUCTION

To access the area listing your service records, first click on the "My Portal" tile, then select **Services We Deliver**.

This page will refresh and display a list of services records that already exist in our database.

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

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

However if needed, you can change the view to see all of the **inactive services** associated with your organisation (*these are records that have been removed from the local directory*). See page for more details on this.

HOW TO CREATE A NEW SERVICE RECORD

The following pages will outline the steps for adding a new record in the portal, detailing the services your organisation provides. This record will be made visible in the local directory.

1.a) To open a blank record, press **Create New Service**.

CREATE NEW SERVICE

Doing this will direct you to a new page, where you can type in all the essential information about the service.

Any field marked with a red asterisk "*" is seen as 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 "**Services we deliver**" link at the top of the form to return to the list of existing records.*

Portal Field Name	Information to be added
Name of the service*	How the service is referred to e.g. Active Ageing.
Is this service community based?*	Select either Yes or No to determine how the address information is displayed on the web pages. See appendix 3 for further details.
Where is this service offered *	The office or venue where this service is offered. See page 7 for further details.
Contact number / Email address / Website	The service contact details you want shared with the public.
Image URL	See the adding an image section for more details on how to use this field.
Is it CQC registered (Internal Use Only)	*This information is for internal use only and will not be displayed on the directory pages.* Select either yes or no.
Does this service use volunteers? (Internal Use Only)	*This information is for internal use only and will not be displayed on the directory pages.* Select either yes or no.
Description*	A brief explanation about the service.

Here is an example of the type of information we would expect to see added to some of the fields within the **About the Service** section.

About the service:

Name of service *

> Money Advice

Is this service community based? *

◉ Yes ○ No

Where is this service offered? *

> Age UK Anytown - Carringt(✖ 🔍

Contact number

> 02030331174

Email address

> info@ageukanytown.org.uk

Website

> http://ageukanytown.org.uk

Image URL Desktop

> https://www.bing.com/images/search?view=detailV2&ccid=1IIBcFqN&id=ED504826557C02A6EAA89D2DE548E1003C11D2C2&thid=

Image URL Mobile

>

Is it CQC Registered? (Internal Use Only)
◉ No ○ Yes

Does this service use volunteers? (Internal Use Only)
◉ No ○ Yes

Description *

> Test service record

ADDING AN IMAGE TO THE WEBPAGE

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

If there is a specific image you want to include on your organisation's webpage in the directory, adding the image address to this field will ensure it is included when the directory page is created.

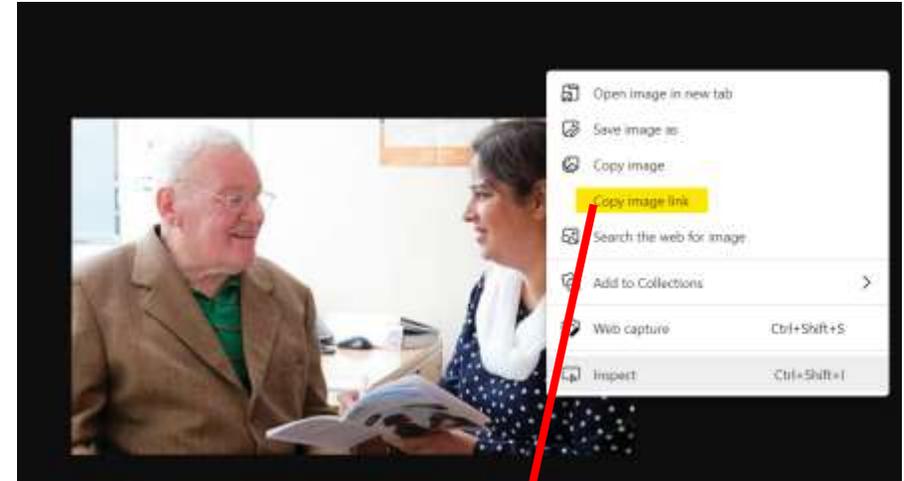**Image URL Desktop**

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/

# 1.b) Select the location where the service is offered.

Where is this service offered? *

Navigate to the "**Where is this service offered?**" box and click on the magnifying glass.

A look up menu will appear, listing location records already stored in our database. These will consist of locations associated with your organisations as well as third party venues.

Scroll through the list, and click into the left column (tick box) to select the relevant one. Then press the **Select** button to confirm your choice.
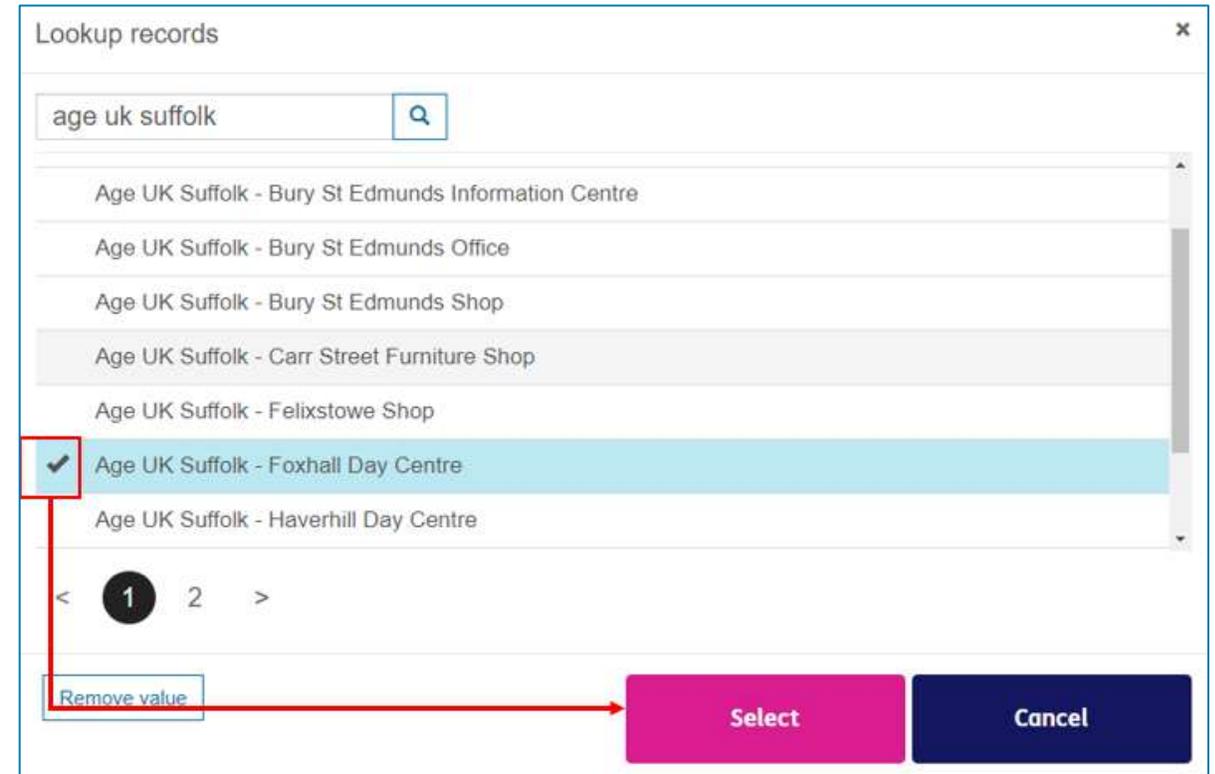
Lookup records

age uk suffolk

- Age UK Suffolk - Bury St Edmunds Information Centre
- Age UK Suffolk - Bury St Edmunds Office
- Age UK Suffolk - Bury St Edmunds Shop
- Age UK Suffolk - Carr Street Furniture Shop
- Age UK Suffolk - Felixstowe Shop
- ✔ Age UK Suffolk - Foxhall Day Centre
- Age UK Suffolk - Haverhill Day Centre

< 1 2 >

Remove value

Select   **Cancel**

2. Complete the **Service Fee** section.

If a fee is charged to service users within your catchment area, click beside **Yes and type in the amount**.

If not, leave the option set at *No* (which is the default option).

Service fee		
Catchment area fee *		£
☐ No ⦿ Yes		5.00

If the service is also available to people outside your catchment area, select either Yes or No to indicate whether they will be charged a fee.
If you select Yes, remember to specify the fee amount.

Outside of catchment area fee   £
*
☐ Yes ☐ No ⦿ Not Available

If the service is not available to those outside of your catchment area, then select **Not Available.**

If needed, you can use the **fee details** box to either provide a reason for the fees or explain that the service is only available in limited postcode areas.

Fee details

This is to contribute to the cost of fuel

Once you have completed this section, press the **Next** button to move to the following page.

3. If applicable, you can add more details about the service on the **Additional Notes** page.

Here you have up to four additional description boxes (and subheadings) if you want to provide more information about the service.

It has been designed in this format so that you determine how the information is displayed on the web page.

Key Link 1/2/3/4

The information you add to the subheading and body text boxes will be displayed on the directory page as plain text. If you want to include any links to external web pages then add the urls for these to the key links fields.

When we convert this record into the directory page, we will turn these into hyperlinks for you.

4. Tag the record with a Service Category.

On the "**Select Categories**" page, you'll be able to add the service categories that relate to the type of service being offered (in the portal, these are referred to as subcategories). Doing so will ensure the service record appears in the filtered searches carried out in the Local Directory.

See appendix 2 for further information.

Select Categories

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

ADD A SERVICE CATEGORY

To do this, click on the "**Add a Service Category**" button.

Then in the pop-up window, scroll down and tick beside the category/subcategory you want to select.

Lookup records

Search

✔	Subcategory ↑	Category
	Smoke alarm	Handyperson/tradesperson
✔	Social dancing	Socialising and activities
✔	Social groups	Socialising and activities
	Stairlift	Helpful equipment
	Support for carers of people with dementia	Dementia support

< 1 2 3 4 5 6 **7** 8 >

Selected records

Dance classes ✖   Social dancing ✖   Social groups ✖

Add   Cancel

You can tick multiple subcategories at once, each will appear in the **Selected Records** box.

When you've finished, press **Add** to confirm your choices.

The page will refresh, listing all your chosen categories.

Once you have finished adding these, press **Save** to finalise the service record creation.

A confirmation window will appear:

- Select **OK if you are happy to create the record** with the information you've provided.

- Select **Cancel to exit and go back** to the record to make any additional changes.

If you have selected **Ok**, this confirmation page will appear.

Press the home icon 🏠 or "**My Portal"** to exit this page.

Submit ✕

Are you sure you would like to save these changes?

Ok   Cancel

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🏠 | Q | Emma Chin3 ▾

Home > My Portal > Services we deliver > Create a New Organisa... > Organisation Service ... > Select Categories

Select Categories

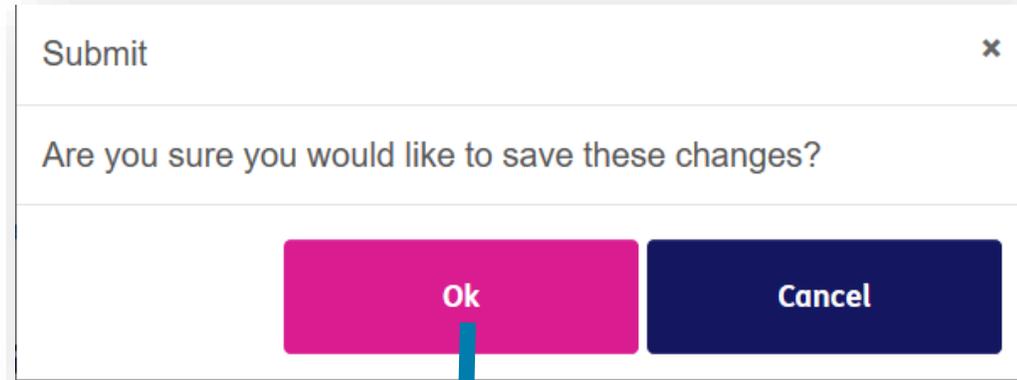By category we mean your service category. Please select as many as are required.

Saved

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

VIEWING AND EDITING EXISTING SERVICE RECORDS.

The following pages will outline the steps for opening and updating service records already in the portal/local directory. It's important to keep these records up to date so that the information in the Age UK Local Directory remains current.

How to view existing service records.

There are two ways you can view an existing record:

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

Alternatively you can click on the drop-down arrow and select "**View details**" (2).

Using either of the aforementioned methods will present you with a '**Read Only**' version of the record. When you have finished checking the record, just press the **X** in the top right corner.

View details [×]

About the service:

Name of service *

Dementia Care

Is this service community based?

◉ Yes ○ No

Where is this service offered? *

Age UK Anytown - Brandon Office

Contact number

02031234567

Email address

info@ageukanytown.org.uk

Website

http://ageukanytown.orguk

Image URL Desktop

—

Image URL Mobile

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

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Home > My Portal > Services we deliver

Services we deliver

This is the list of services offered by your local Age UK. Please note: these services must be delivered by your Age UK and not an external organisation.

CREATE NEW SERVICE

☰ Active Services

Service Name ↑	Organisation	Modified On
Dementia Care	Age UK Anytown - Brandon Office	09/11/2020 2:19 PM
Money Advice	Age UK Anytown - Carrington Cottage	09/11

❶ View details

☑ Edit

17

An editable version of record will open, where most of the fields will now be surrounded by a box, indicating that they are unlocked. Scroll through the page and where you need to make changes, click into the field and over-type the existing information with the new details.

Edit Service

About the service:

Name of service *

Dementia Care

Is this service community based?

● Yes ○ No

Where is this service offered? *

Age UK Anytown - Brandon [✕] [🔍]

Contact number

02031234567

Email address

info@ageukanytown.org.uk

Website

http://ageukanytown.org.uk

Image URL Desktop

If you need to change the location of the service, go to the **Where is this service offered?** section and press the button with an **X**. This will clear the box. Then press the **magnifying glass** and the follow the same steps outlined on

If you need to add additional service categories, press the **Add A Service Category** button, and follow the same steps outlined on .

ADD A SERVICE CATEGORY

Subcategory ↑   Category

EC Test - Advice   ECTest - Health and   [˅]
                                 Wellbeing   REMOVE

If you need to remove a service category from this record, press the down arrow to the right of the category and select **Remove**. The list will refresh, and the category will no longer be listed.

Once all of the information has been updated, scroll down and press **Save** to update the record.

A confirmation window will appear, and if you are sure you've added all the relevant information select **Ok**.

HOW TO REMOVE A SERVICE RECORD.

The following pages will outline the steps for removing a service record from the search lists in the local directory. The record will still exist in the portal, so you can re-open it if you need to later.

On the Services we deliver page:

1. Navigate to the service record you wish to edit.

2. Press the down arrow next to the modified-on date/time column.
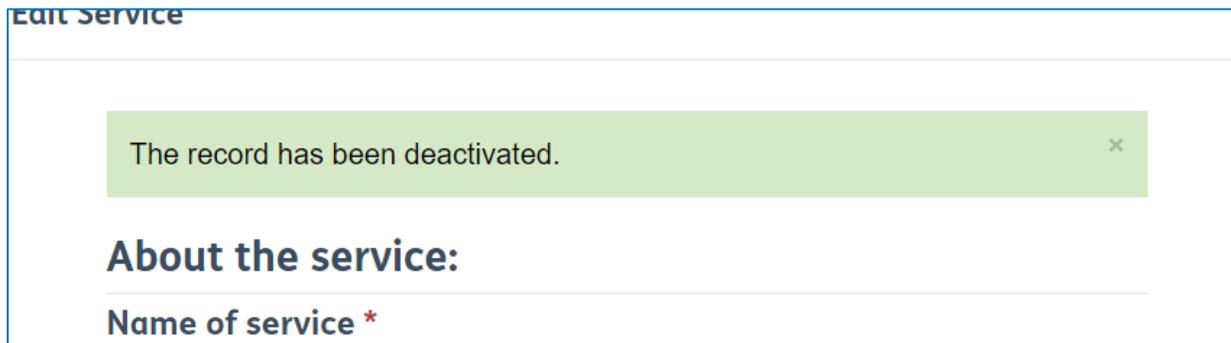
3. Select **Edit**.

Scroll down to the bottom of the page and press "**Mark As Inactive**".

Subcategory ↑	Category	
Lunch/food facilities	Café and restaurant	⌄

SAVE

MARK AS INACTIVE

Edit Service

The record has been deactivated.   ×

About the service:

Name of service *

The page will refresh, and a banner will appear with the following message "*The record has been deactivated*".

The local directory is refreshed at the end of the day, so all changes made in the portal will be visible in the local directory the next working day.

Although service records marked as inactive will be removed from the local directory, the records will still be stored in the portal.

Services we deliver

This is the list of services offered by your local Age UK. Please note: these services must be delivered by your Age UK and not an external organisation.

CREATE NEW SERVICE

☰ Active Services ▾

Service Name ↑   **Organisation**

Active Services
Inactive Services

If you want to see any of these records, you will need to switch the default view:
1. Within the Service We Deliver section, select the **Active Services** box.
2. A drop down list will appear.
3. Select **Inactive Services**.

Scroll through the list until you find the record you want to look at. Click on the down arrow next to the modified-on date/time column, and select either:

(a) **View Details** – *this will just be a read only version of the record.*

(b) **Edit** – *this will open a version of the record that will allow you to edit the record.*

If you wish to re-open a record, select Edit. Once the record opens, scroll down and select the **Re-Open** button.
The record will now be marked as "active" and be visible in the local directory the next working day.

APPENDICES

APPENDIX 1 : WARNING MESSAGES

If this error message appears where you are trying to save changes made to a service record, it means that you do not have the relevant access rights to carry out this task.

Edit Service

🛈 **The form could not be submitted for the following reasons:**

You don't have the appropriate permissions.

In scenarios like this, or similar, please send an email to portalaccess@ageuk.org.uk and one of the team will investigate this for you.

APPENDIX 2 : 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 the records is 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/
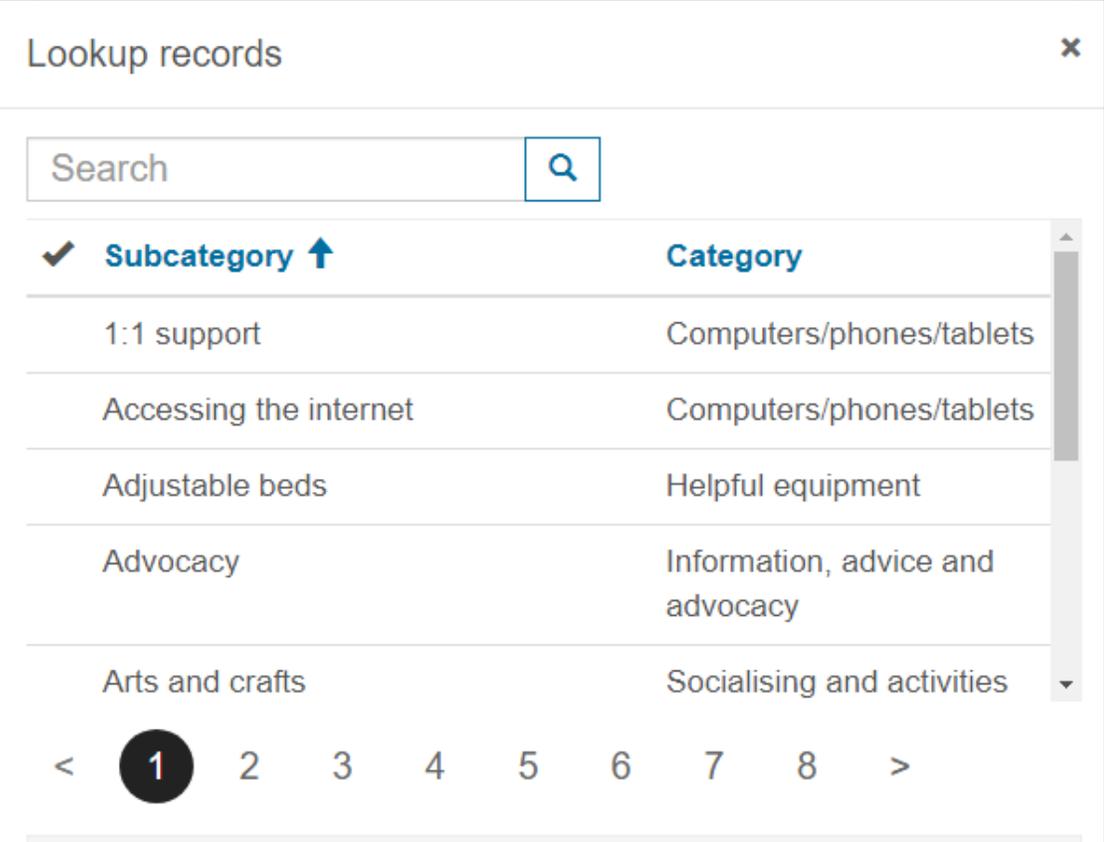
Lookup records	✕

Search 🔍

✓ 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 >

APPENDIX 3: COMMUNITY BASED SERVICES

The postcode search functionality on our website will give visitors to the site the ability to find services within their area. In order for this feature to work, the system requires a full address on every service record.

However if there is no fixed location associated with this service, or the location is a private office/ can only be accessed with an appointment, then we can hide the address on the directory page.

To set this option, you will need to answer the "*Is this service community based*" question at the top of the service record.

If the service has no fixed location, then select **Yes**. The address details you add to this record will only be used internally so we can calculate the distance between the service location and the enquirer's address.

If there is a specific address and you would like that displayed on the record, then select **No**.

Create a New Organisation Service

About the service:

Name of service *

Is this service community based? *
○ Yes ○ No

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.