

# BRAND PARTNER PORTAL

Our Events and Activities.



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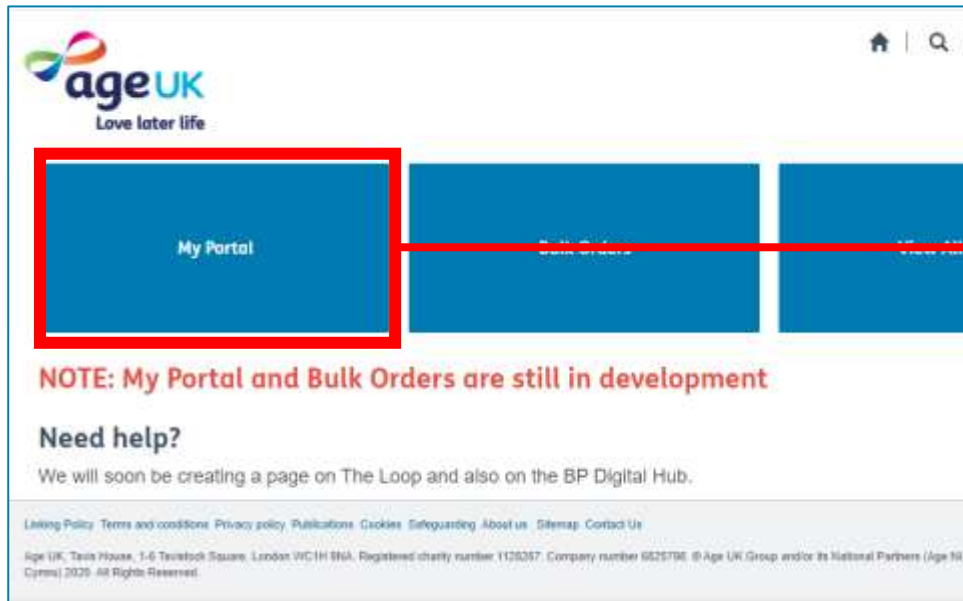
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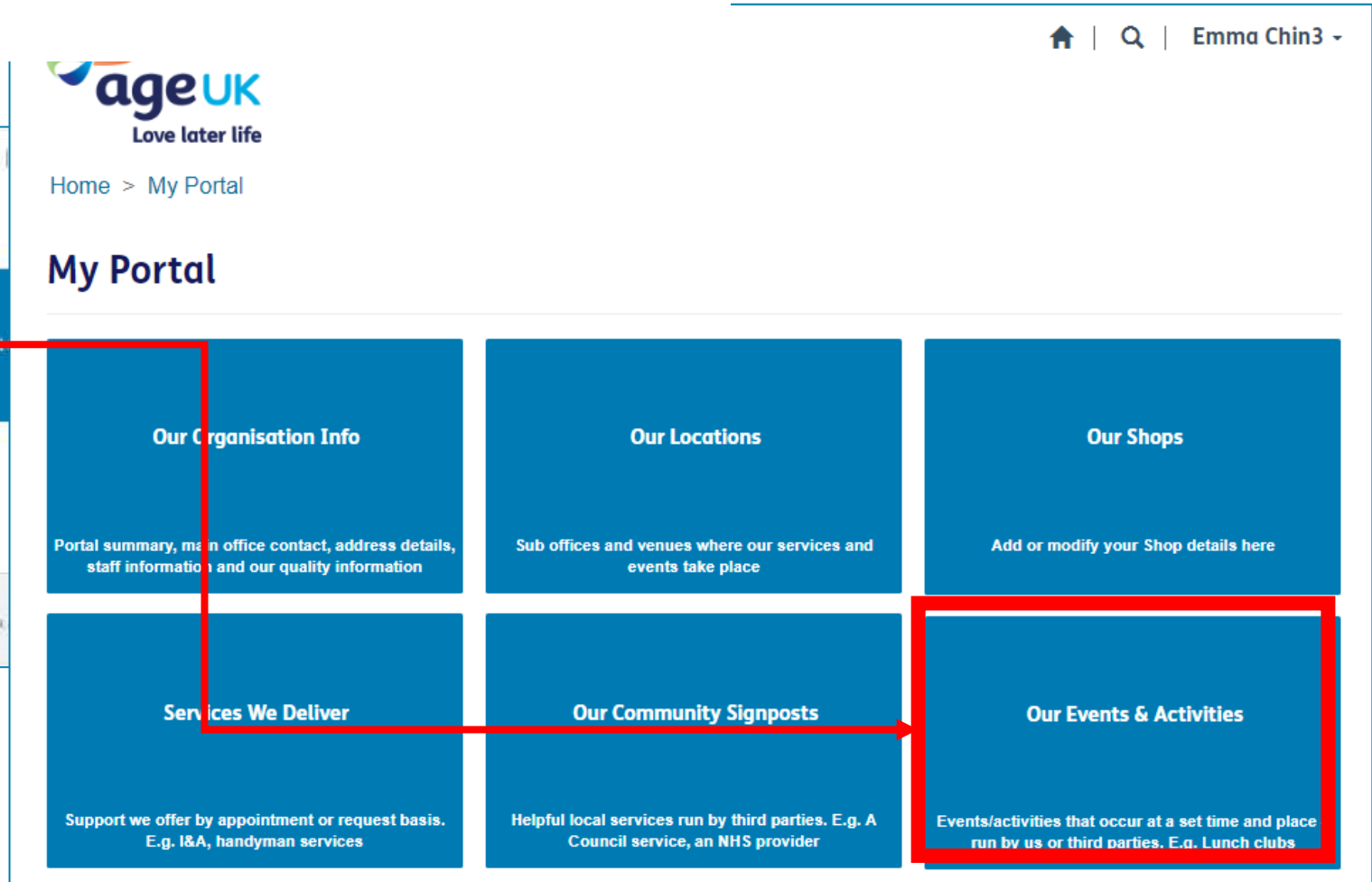
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# INTRODUCTION

To access the area listing your event records, first click on the “My Portal” tile, then select **Our Events & Activities**.



This page will refresh and display a list of events currently within our database.



From this page you will be able to create new events run either by your organisation or a third-party provider, as well as view, edit and remove existing ones.

[Home](#) > [My Portal](#) > [Our Events & Activities](#)

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

 Event/Activity Run by Age UK

Event ID ↑	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
Fun Walk N Run	Weekly	01/08/2020 9:00 AM	Age UK Anytown - Head Office	28/07/2020 5:22 PM	<div><div>▼</div><div><div><div>View details</div><div>Edit</div><div>Edit this series of events</div><div>Delete</div><div>Delete this series of events</div><div>Deactivate this series of events</div></div></div></div>
Weekday Matinee	Daily	13/07/2020 2:30 PM	Age UK Anytown - Head Office	28/07/2020 5:26 PM	

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

## ☰ Event/Activity Run by Age UK ▾

Event/Activity Run by Age UK

Event/Activity NOT Run by Age UK

Inactive Event/Activity Run by Age UK

Inactive Event/Activity NOT Run by Age UK

BPP - Third Party Pending/Failed Events

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

However if needed, you can change the view by clicking on the down arrow and selecting a different option to see both active and inactive records associated with your organisation.

View name	Descriptions
<b>Event/Activity Run by Age UK</b>	Event/ activity records showing in the local directory, which are run by your organisation.
<b>Event/Activity NOT Run by Age UK</b>	Event/ activity records showing in the local directory, which are run by a third party.
<b>Inactive Event/Activity Run by Age UK</b>	Event/ activity records which have been removed from the local directory because they have been made inactive. These were run by your organisation.
<b>Inactive Event/Activity NOT Run by Age UK</b>	Event/ activity records which have been removed from the local directory because they have been made inactive. These were run by a third-party provider.
<b>BPP – Third Party Pending/ Failed Events</b>	Event/ activity records which have been hidden from the local directory because their vetting status is showing as pending or failed.

# HOW TO CREATE A RECORD FOR AN EVENT/ACTIVITY RUN BY AGE UK.

The following pages will outline the steps for creating a new event/activity record in the portal, that is run by your organisation.



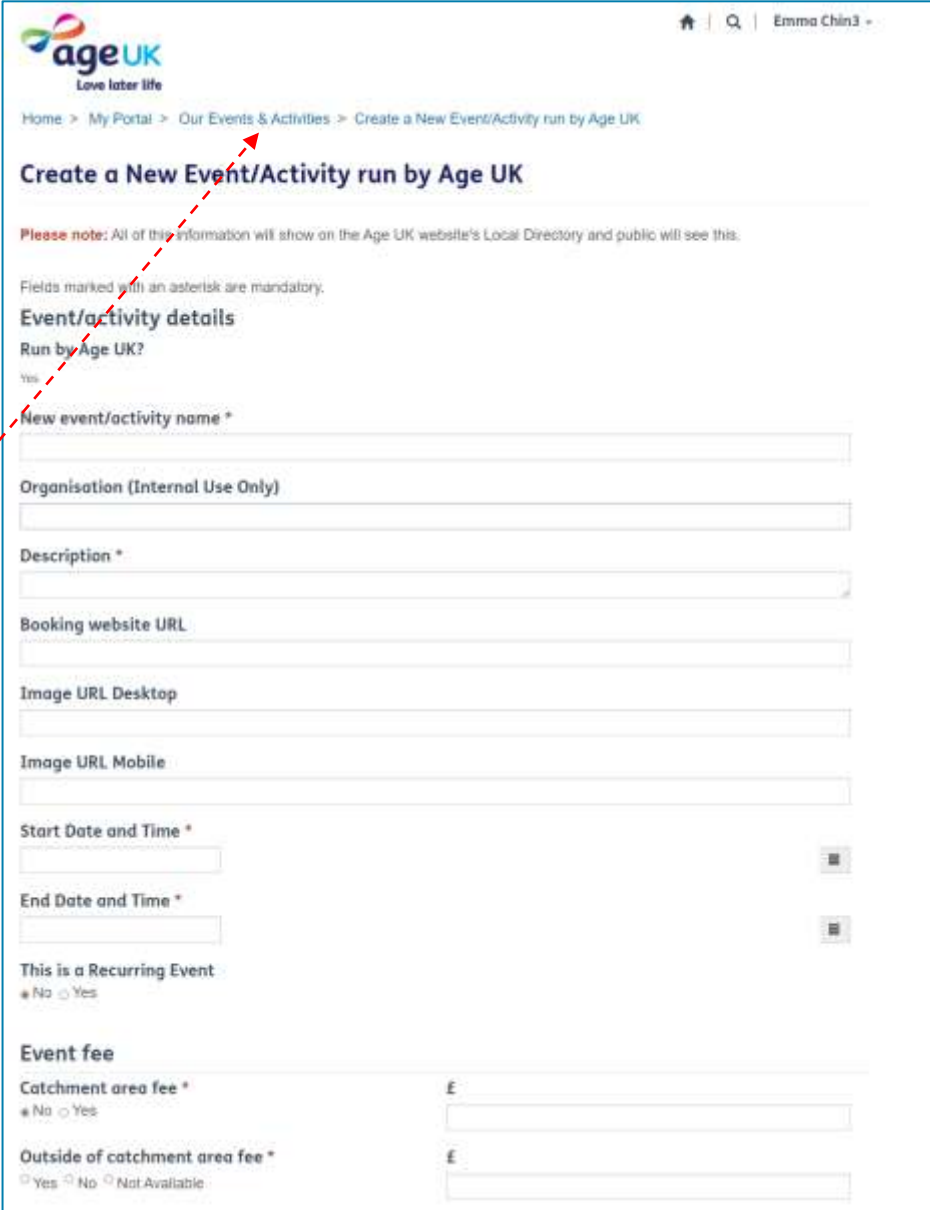
# 1) To open a blank record, select “Create Event/Activity Run by Age UK”.

Create Event/Activity Run by Age UK

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

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 “**Create Event/Activity Run by Age UK**” link at the top of the form to return to the list of existing records.*



ageUK  
Love later life

Home > My Portal > Our Events & Activities > Create a New Event/Activity run by Age UK

### Create a New Event/Activity run by Age UK

**Please note:** All of this information will show on the Age UK website's Local Directory and public will see this.

Fields marked with an asterisk are mandatory.

#### Event/activity details

Run by Age UK?  
☐ Yes ☐ No

New event/activity name \*

Organisation (Internal Use Only)

Description \*

Booking website URL

Image URL Desktop

Image URL Mobile

Start Date and Time \*

End Date and Time \*

This is a Recurring Event  
☒ No ☐ Yes

#### Event fee

Catchment area fee \* £

Outside of catchment area fee \* £

☐ Yes ☐ No ☐ Not Available



Here is an example of the type of information we would expect to see added to some of the fields within the **Event/Activity Details** section.

<i>Portal Field Name</i>	<i>Information to be added</i>
<b>Name event/activity name</b>	What the event/activity is called e.g. Tuesday Lunch Club.
<b>Description</b>	A brief explanation about the event / activity.
<b>Booking website URL</b>	The web address for where the individual can register and/or book tickets for this event (if applicable).
<b>Image URL Desktop / Image URL Mobile</b>	<p>The web address for the image you want visible with this event/activity.</p> <p>Please take a look our Image Size Reference Guide to find our recommended format for the Portal <a href="https://bp-digital-hub.ageuk.org.uk/image-size-reference-guide/">https://bp-digital-hub.ageuk.org.uk/image-size-reference-guide/</a></p>

## Create a New Event/Activity run by Age UK

**Please note:** All of this information will show on the Age UK website's Local Directory and public will see this.

Fields marked with an asterisk are mandatory.

### Event/activity details

**Run by Age UK?**

Yes

**New event/activity name \***

**Organisation (Internal Use Only)**

**Description \***

**Booking website URL**

**Image URL Desktop**

**Image URL Mobile**

## 2) Add the start / end date and time

Here you'll be able to add the day the event/activity will be hosted, as well as specify when it will start and finish. If the event occurs on multiple days, you can indicate this in the Recurring Event section.

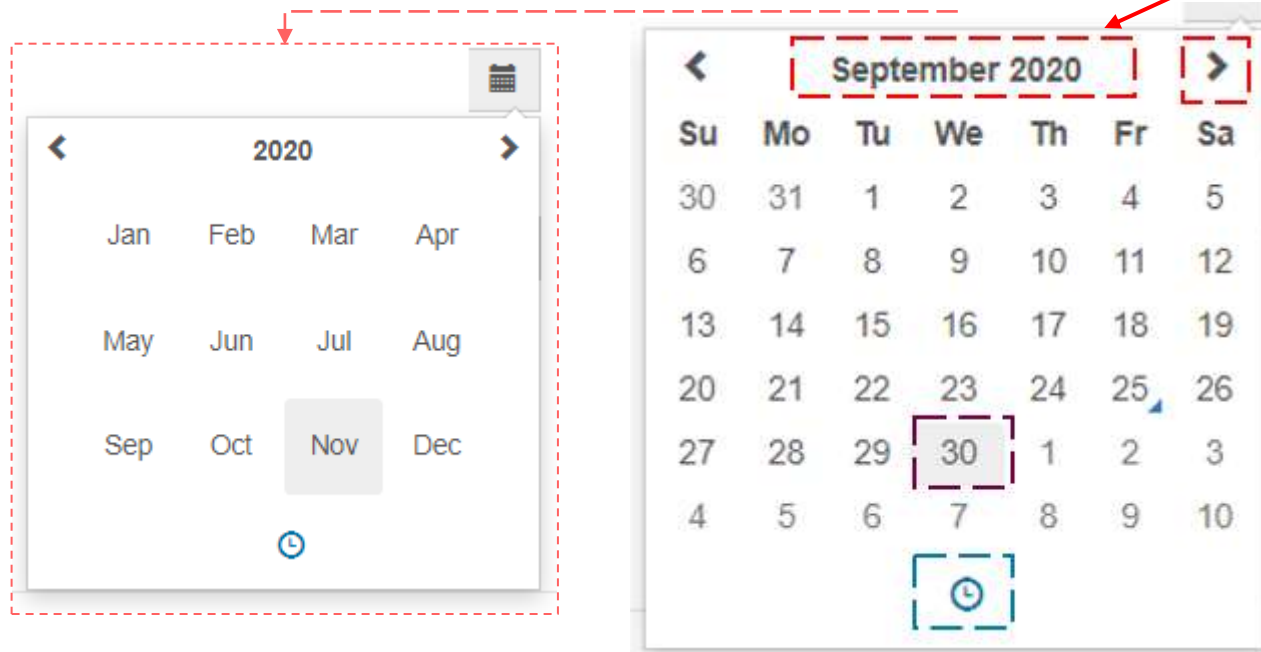
**Start Date and Time \***

  
**End Date and Time \***

Select the calendar icon for the relevant field.

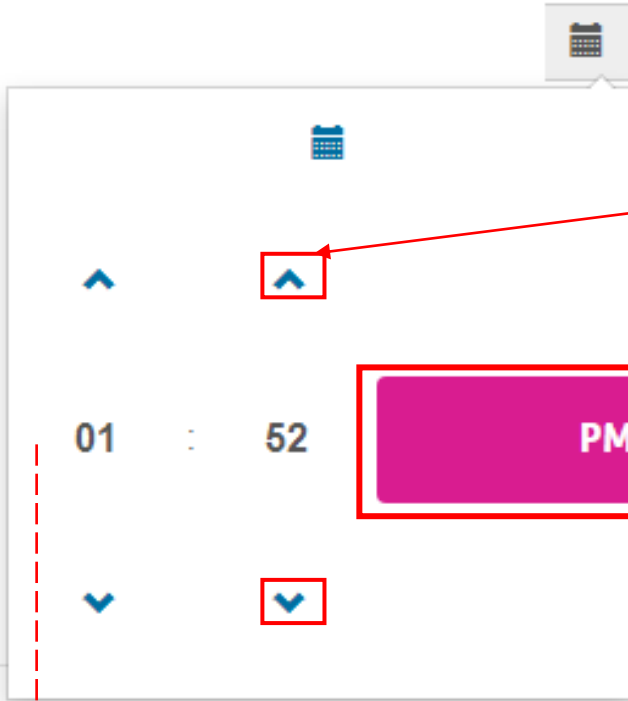
In the calendar window, you can either:

- Click on the month-year at the top (e.g September 2020) to switch to the view and select the month required.
- Select the left or right arrows to move to the previous or upcoming months.



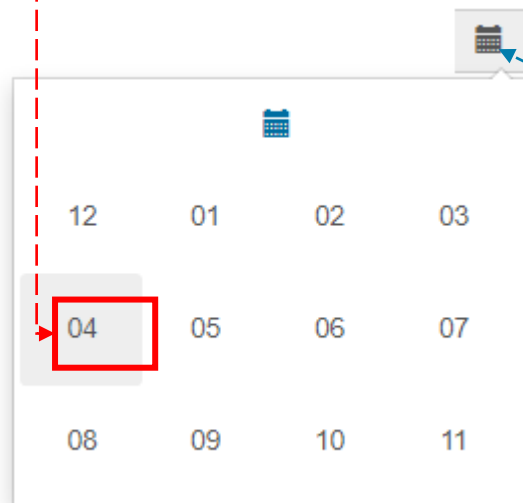
When you've landed on the required one, click on the specific day.

Once you've selected the date, click on the clock ⌚ icon to set the time of the event.



You can change the time by pressing the **Up** and **Down** arrows to set the hour and minutes. Then, click on the **AM / PM** button to indicate whether the time is for a morning or afternoon event.

Alternatively, you can click on the hour or minute, to change the view to a grid of numbers. From here you can set the required time.



Once you have finished, click on the calendar icon to close the view.

### 3) Indicate whether this is a one –off or reoccurring event.

**Start Date and Time \***  
06/10/2020 12:30 PM

**End Date and Time \***  
06/10/2020 2:30 PM

**This is a Recurring Event**  
☒ No ☐ Yes

#### one off event

This is an event or activity that you are only running once.

Leave the option set to '**No**'.

#### recurring event.

This is an activity or event that repeats on a daily, weekly, monthly or yearly basis.

Click on the button next to **Yes**.

This will trigger the **recurrence pattern and range** sections to appear.

Next, click into the **Repeats** field to pick the frequency pattern for this event/activity.

# Recurrence Pattern

## Repeats

▼

Every 3 Weeks

Daily

Weekly

Monthly

Yearly

The type of information you need to provide will differ depending on the option selected.

## Every 3 Weeks

If the event occurs every weekday, select **Yes**.

Repeats

Every 3 Weeks

▼

Every

3

days

OR Every Weekday

☐ Yes ☐ No

If it doesn't but instead takes place every x number of days, then select **No** and type in the number of days.

## Daily

If the event occurs every weekday, select **Yes**.

Repeats

Daily

▼

Every

days

OR Every Weekday

☐ Yes ☐ No

If it doesn't but instead takes place every x number of days (e.g every two days), then select **No** and type in the number of days.

## Weekly

Type the number of weeks the event occurs.

For example:

- if it happens every week, then type in **1**
- If it happens every fortnight, then type in **2**

### Repeats

Weekly ▼

### Every

weeks

### Select all that apply

- ☐ Monday
- ☒ Tuesday
- ☐ Wednesday
- ☒ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday

Next, tick  
beside all the  
days the event  
takes place on.

## Monthly

Type the number of months the event occurs.

### Repeats

Monthly ▼

### Every

1

months

on

### Day

or

### The

First ▼

Monday ▼

For example if it takes  
place every second  
month, then type in **2**.

Now type in the date, for  
example if it is held on  
the 14th, then type in **14**.

Alternatively you can  
click into the boxes under  
"The" and select either  
**first, second, third,**  
**fourth or last, followed**  
**by the day** (Monday,  
Tuesday, etc)

## Yearly

If the event occurs annually, you can select Yearly and leave the rest of the fields blank.

But if there is a specific pattern for this occurrence, then under the "or" section, complete the following:

- Select whether the event is held on the first/ second/ third/ fourth day.
- Then type in the number of years, for example if it takes place every second year, then type in **2**.
- Finally, pick the month.

### Recurrence Pattern

**Repeats**

Yearly

or

**The**

Second

Tuesday

**Every**

1

**years**

**in**

October

## Recurrence Range

Within this section type in the number of instances the event is scheduled for. For example:

- If you have selected monthly, and the event/activity is scheduled to run for the next 10 months, then type in **10**.
- If you have selected weekly, the event is scheduled to run for the next six weeks, then type in **6**.

### Recurrence Range

**End after**

10

**occurrences**

When you save this event record, the system will automatically create an event series by duplicating the record based on the frequency pattern you set under the **Recurrence Pattern** and **Recurrence Range** sections.

Event/Activity Run by Age UK-					
Event ID ↑	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
Friday Lunch Club	Daily	02/10/2020 12:00 PM	Age UK Anytown - Head Office	29/09/2020 9:16 AM	▼
Fun Walk N Run	Weekly	01/08/2020 9:00 AM	Age UK Anytown - Head Office	29/09/2020 9:16 AM	▼
Test Walk Club	Monthly	28/10/2020 11:30 AM	Age UK Anytown - Head Office	29/09/2020 12:25 PM	▼
Test Walk Club	Monthly	28/12/2020 11:30 AM	Age UK Anytown - Head Office	29/09/2020 12:25 PM	▼
Test Walk Club	Monthly	28/02/2021 11:30 AM	Age UK Anytown - Head Office	29/09/2020 12:25 PM	▼
Test Walk Club	Monthly	28/04/2021 12:30 PM	Age UK Anytown - Head Office	29/09/2020 12:25 PM	▼

It will also calculate the start dates and assign them to each record in the series.



## 4) Complete the **event fee** section.

If people living within your catchment area are charged a fee for attending this event/activity, then click beside **Yes** and type in the amount.

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

The screenshot shows the 'Event fee' section of a form. It contains two main input areas: 'Catchment area fee' and 'Outside of catchment area fee'. The 'Catchment area fee' section has radio buttons for 'No' and 'Yes', and a text input field for the amount, which is currently set to '5.00'. A red box highlights this section, and a red arrow points from the text on the left to the 'Yes' radio button. The 'Outside of catchment area fee' section has radio buttons for 'Yes', 'No', and 'Not Available', and a text input field for the amount, which is currently set to '5.00'. A green box highlights this section, and a green arrow points from the text on the right to the 'Yes' radio button. Below these sections is a 'Fee Details' text area. A dashed green line connects the 'Not Available' radio button to the text on the right.

**Event fee**

**Catchment area fee \*** £ \*

☐ No ☒ Yes

5.00

**Outside of catchment area fee** £ \*

☒ Yes ☐ No ☐ Not Available

5.00

**Fee Details**

If the event 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.**

If it 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 event/activity is only available in limited postcode areas.

## 5) Add the contact information for this event / activity.

Under **Event/activity contact details**, type the information the public can use to get in touch with you about the event.

### Event/activity contact details

#### Telephone number \*

020303310101

#### Public email address

[info@ageukanytown.org.uk](mailto:info@ageukanytown.org.uk)

#### Public website address


<http://ageukanytown.org.uk>

Under the **Event/activity location**, instead of typing the address details, click on the magnifying glass and look for the location record. In the pop-up window, a list of existing records will be displayed; just **click beside the required one and press Select**.


If you cannot find the required location, you will need to create a record for it within the *Our Locations* section the portal. For now, press **Cancel** and **continue creating the event record**. You can return to the record and add these details at a later stage.

### Event/activity location

#### Location

Lookup records ×



✓ Organisation Name ↑	Modified On	Modified By
✓ Age UK Anytown - Carrington Cottage	18/09/2020 2:35 PM	D365NPDSVRSETUP - Dynamics Server Setup

## 6) Add the contact details for the person running/ managing the event.

Under this section, you can type in the name and contact details of the person managing the event/ activity.

The information added here will not be displayed in the local directory and is strictly for internal use, so that Age UK can get in touch with this contact should we have any enquires about the event.

Once you've completed all the section on this page, press the **Next** button.

### Contact's details

**Contact name (Internal Use Only)**

**Contact email (Internal Use Only)**

**Contact phone (Internal Use Only)**

**NEXT**

7) If applicable, you can add more details about the event 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.

**Additional notes**

**Sub heading 1**

How to get there?

**Body text 1**

There is limited parking on site for members of the public, but there is a number of free-parking streets within 2 miles of the location. We can also arrange a pick-up and drop off transport but there are a limited number of spaces. Please call us if you would like to reserve a spot.

**Sub heading 2**

**Body text 2**

**Sub heading 3**

**Body text 3**

**Sub heading 4**

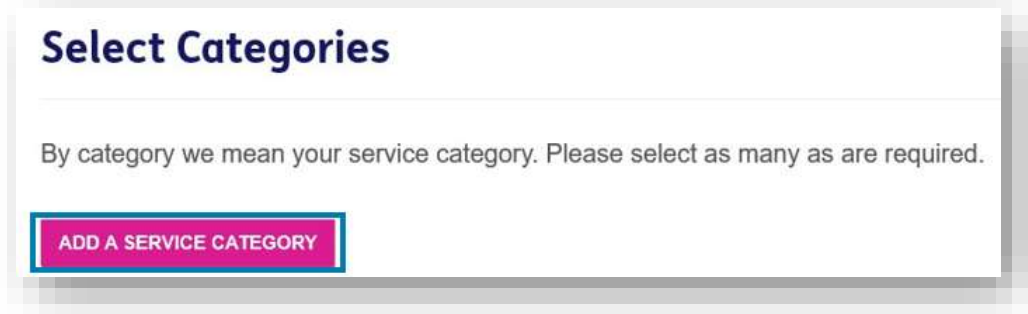
**Body text 4**

**Key link**

## 8) 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.



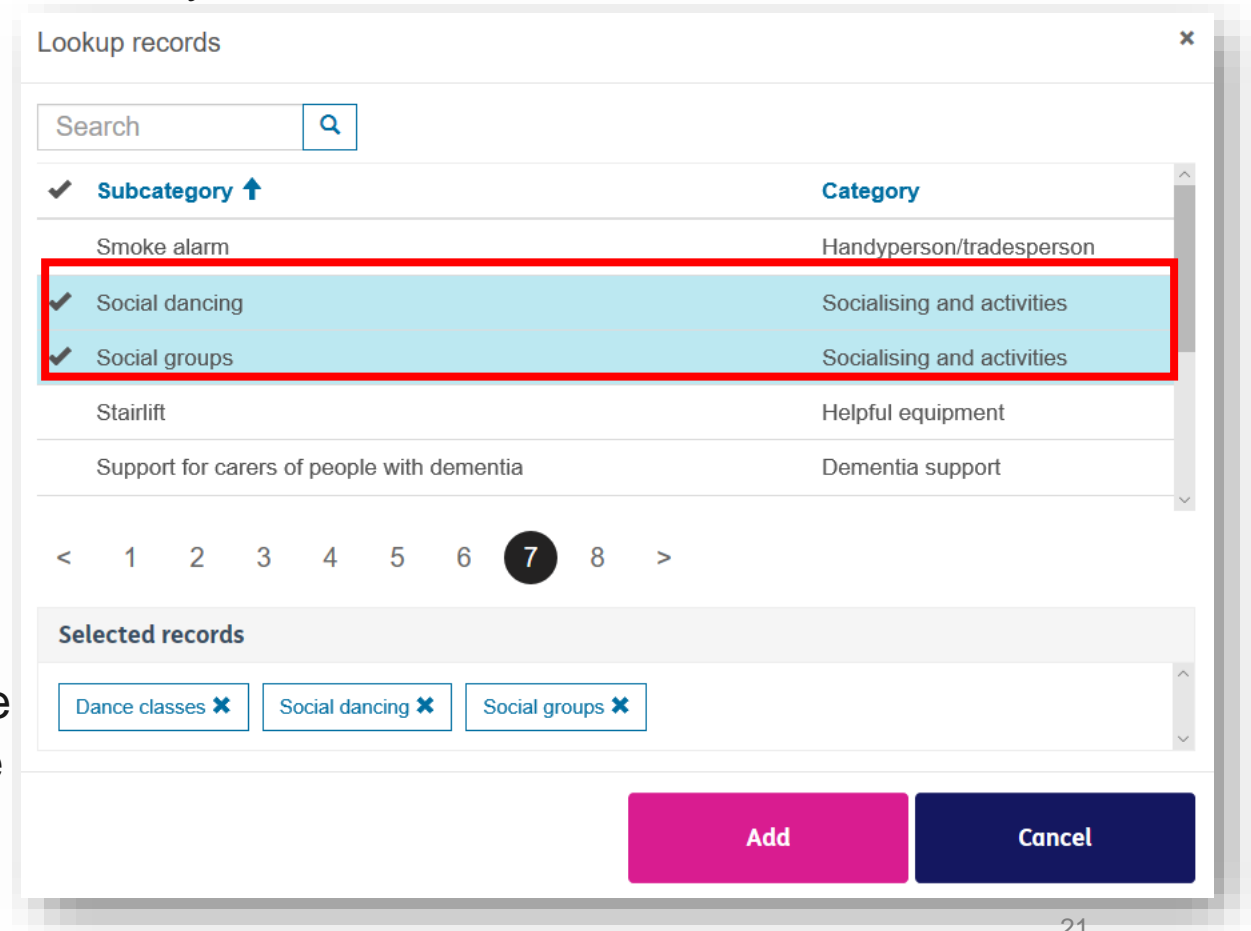
**Select Categories**

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 to select the required service category.



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 appear in the **Selected Records** box. If you've selected one by mistake, then press the **x** to remove them from the selected records box.

Lookup records

Search

✓ Subcategory ↑

Smoke alarm

✓ Social dancing

✓ Social groups

Stairlift

Support for carers of people with dementia

Handyperson/tradesperson

Socialising and activities

Socialising and activities

Helpful equipment

Dementia support

1

2

3

4

5

6

7

8

>

Selected records

Dance classes ✕

Social dancing ✕

Social groups ✕

Add

Cancel

When you've finished, press **Add**.

The page will refresh, listing all the categories you selected.

Select Categories

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

ADD A SERVICE CATEGORY

Subcategory ↑

Social dancing

Social groups

Tea and Coffee services

Test

Category

Socialising and activities

Socialising and activities

Café and restaurant

test

SAVE

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

Once you have finished adding all the necessary information regarding the event, press **Save**.

A confirmation window will appear:

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

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

Once the record has been saved, the system will display this confirmation page.

Press the home icon 🏠 or “**Our Events & Activities**” to exit this page.

The image shows a two-part screenshot. The top part is a 'Submit' confirmation dialog box with a close button (x) in the top right corner. It asks 'Are you sure you would like to save these changes?' and has two buttons: a pink 'Ok' button and a dark blue 'Cancel' button. A red arrow points from the 'Ok' button down to the main page below. The bottom part is the 'Select Categories' page on the Age UK website. It features the Age UK logo with the tagline 'Love later life'. The breadcrumb trail is 'Home > My Portal > Our Events & Activities > Event - Add Note > Select Categories', with 'Our Events & Activities' highlighted by a red dashed box. The page title is 'Select Categories'. Below this, it says 'By category we mean your service category. Please select as many as are required.' A green success message banner reads 'Event/Activity has been saved successfully'. At the bottom, there is contact information: 'If you have any questions about information on this page, please get in contact at [partnership@ageuk.org.uk](mailto:partnership@ageuk.org.uk)'. The footer contains links for 'Linking Policy', 'Terms and conditions', 'Privacy policy', 'Publications', 'Cookies', 'Safeguarding', 'About us', 'Sitemap', and 'Contact Us', followed by copyright information for Age UK.

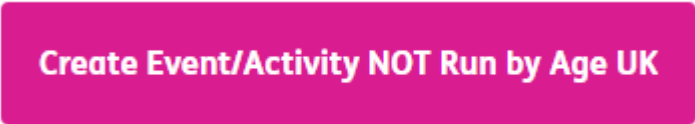
# CREATING A RECORD FOR AN EVENT/ACTIVITY NOT RUN BY AGE UK.

The following pages will highlight the different requirements for adding a new event/activity that is run by a third party.





If you would like to list an event/ activity that is run by a third party, then click on the **Create Event/Activity NOT Run by Age UK** button.



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

You will notice at the top of the record, the Run by Age UK question will be set to **No**.

We would recommend including the third-party provider's name in the event name, as this will make it easier to differentiate the events they run which might be similar to ones run by Age UK.

**Event/activity details**  
**Run by Age UK?**  
No  
  
**New event/activity name \***  

St Andrews Tuesday Lunch Club

You will also be required to indicate whether the third party is one of the following:

- A council or government service
- An NHS service provider or GP surgery
- A citizens advice office or branch of a national volunteering service.

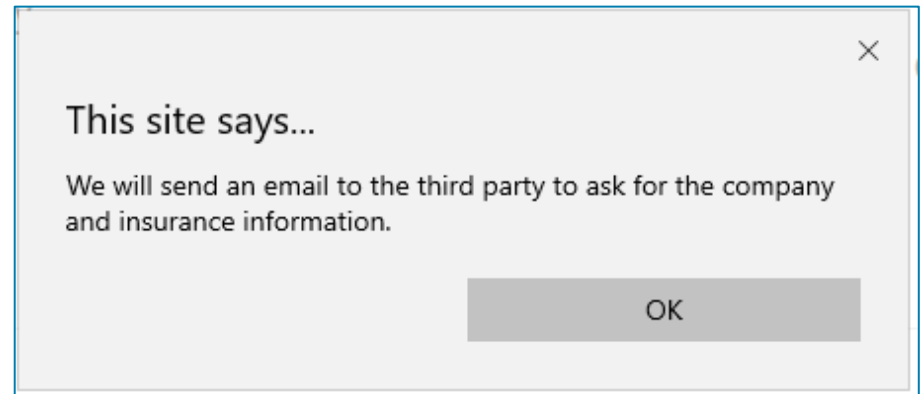
If they are, select **Yes**. If not, select **No**.

**Is the third party provider one of the following: \***

- A council or government service
  - An NHS service provider or GP surgery
  - A Citizens Advice office or branch of a national volunteering organisation (e.g. British Red Cross)
- ☐ Yes ☐ No

When you do, a pop up window will appear letting you know that we will need further information from this provider as part of our vetting process.

Don't worry; Age UK National will carry out this additional step. Further details about this process is outlined in appendix 1.



The rest of the record has the same layout as the one shown in the Creating A Record for an Event/Activity Run by Age UK section of this guide, so you can follow the same steps to complete the remainder of the record.

# HOW TO VIEW, EDIT OR REMOVE A SINGULAR EVENT RECORD.

The following pages will outline the steps for making changes to any existing event/activity records in the portal. The steps shown here will only be for a singular event record.

If you would like to view an existing event/activity record, there are two ways in which you can do so:

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

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Home > My Portal > Our Events & Activities

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Search Event or Activity

Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK

Event ID	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
<a href="#">Fun Walk N Run</a>	Weekly	26/06/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<input type="checkbox"/>
<a href="#">Fun Walk N Run</a>	Weekly	22/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<input checked="" type="checkbox"/>
<a href="#">Fun Walk N Run</a>	Weekly	29/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	
<a href="#">Fun Walk N Run</a>	Weekly	05/06/2021 9:00 AM	Age UK	16/04/2021	

- View details
- Edit
- Edit this series of events
- Delete
- Delete this series of events
- Deactivate this series of events

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 form.

Use the scroll bar or Pg Dn key to move down the page. When you've finished, press the **X** in the top right corner to close the record.

**View details**

**Event/activity details**

Run by Age UK?

Yes

**New event/activity name**

Fun Walk N Run

**Organisation (Internal Use Only)**

Age UK Anytown

**Description**

Walk or run 5km.

**Booking website URL**

—

**Image URL Desktop**

<https://th.bing.com/th/id/OIP.NdOaBhOVZxios72GUwLZjQHafj?w=224&h=180&c=7&o=5&pid=1.7>

**Image URL Mobile**

—

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

**ageUK**  
Love later life

Home > My Portal > Our Events & Activities

**Our Events & Activities**

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Search Event or Activity

Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK-

Event ID	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
Fun Walk N Run	Weekly	26/06/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	View details
Fun Walk N Run	Weekly	22/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	Edit
Fun Walk N Run	Weekly	29/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	Edit this series of events
Fun Walk N Run	Weekly	05/06/2021 9:00 AM	Age UK	16/04/2021	Delete
					Delete this series of events
					Deactivate this series of events

You be presented with an editable version of the record where all the fields will be unlocked.

Just scroll down and click into the field that needs editing, then over-type or add the new information.

## Edit Event/Activity

### Event/activity details

Run by Age UK?

Yes

Name of event/activity

Fun Walk N Run

Organisation (Internal Use Only)

Age UK Anytown

Description \*

Walk or run 5km.

Booking website URL

Image URL Desktop

<https://th.bing.com/th/id/OIP.NdOaBhOVZxlos72GUwLZjQHafj?w=224&h=180&c=7&o=5&pid=1.7>

Image URL Mobile

Start Date and Time \*

22/05/2021 9:00 AM



End Date and Time

22/05/2021 10:30 AM



This is a Recurring Event

☒ No ☐ Yes

If you need to update the service categories tagged to this record, you can:

- Press **Add A Service Category** to tag additional categories.
- Click the down arrow beside an existing category and select **Remove** to delete the tag.

When you have finished updating the record, press **Save**.

If you need to remove the record from the local directory but not delete it from the portal database, press **Mark As Inactive**.

Event/Activity Run by Age UK

Event/Activity Run by Age UK

Event/Activity NOT Run by Age UK

Inactive Event/Activity Run by Age UK

Inactive Event/Activity NOT Run by Age UK

BPP - Third Party Pending/Failed Events

Any record you make inactive will still be stored within the portal and can be found under the **Inactive Event/Activity** lists.

To access these, press the Event/Activity Run by Age UK button and **select either the list of events run by Age UK or Not run by Age UK.**

If you want to make them visible again in the local directory, click the down arrow beside the record and select **Reactivate this series of events.**

Event ID ↑	Start Date and Time	Recurrence Schedule	Associated Age UK	Modified On	
000testUAT TEST 08 09 2020	04/09/2020 10:36 AM	Daily	Age UK Anytown - Head Office	08/09/2020	⌵
000testUAT TEST 08 09 2020	04/09/2020 10:36 AM	Daily	Age UK	08/09/2020	⌵

View details

Reactivate this series of events

Then in the confirmation pop-up, select **Bulk Reactivate**.

The system will update the record, and it will be visible in the local directory the following working day.

Bulk Reactivate

Are you sure you want to bulk reactivate this series of events?

Bulk Reactivate

Cancel



## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Search Event or Activity



Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK-

Event ID	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On ↓	
Fun Walk N Run	Weekly	26/06/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	▼
Fun Walk N Run	Weekly	22/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	☑
Fun Walk N Run	Weekly	29/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<div> View details  Edit  Edit this series of events  Delete  Delete this series of events  Deactivate this series of events </div>
Fun Walk N Run	Weekly	05/06/2021 9:00 AM	Age UK	16/04/2021	▼

If you need to remove the record from the local directory and the portal database:

1. press the down arrow next to the record.
2. Select **Delete**.

The system will flag the record for deletion and remove it from the portal and local directory by the end of the day.

# HOW TO EDIT OR REMOVE MULTIPLE EVENT RECORDS.

The following pages will outline the steps for making changes to an existing event/activity series. The steps shown here will explain the bulk edit functionality within the portal.

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK -

Event ID	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On ↓	
Fun Walk N Run	Weekly	26/06/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	▼
Fun Walk N Run	Weekly	22/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	▼
Fun Walk N Run	Weekly	29/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	▼
Fun Walk N Run	Weekly	05/06/2021 9:00 AM	Age UK	16/04/2021	▼

- View details
- ✓ Edit
- Edit this series of events**
- Delete
- Delete this series of events
- Deactivate this series of events

An event series is created when you indicate on the record that it is a recurring event and specify the recurrence pattern.

Instead of creating a master record, the system will duplicate the record you created, and apply all the dates in series based on the frequency and pattern information you specified.

The bulk edit mode follows a similar principle, allowing you to edit one record in the series which the system will then replicate across to the rest.

To access this mode, click on the drop-down arrow to the right of the event name, and select **“Edit this series of events”**.

You be presented with an editable record, where you'll be able to click into the field that needs editing, and type in the new information.

However, there are some sections that are not available in bulk edit mode so you will not be able to make any changes to them.

These are:

- event/ activity name
- event start/end date and time
- service category list.

If you do need to amend any of these, then you can either:

- a) delete the entire series and create a new one with the correct information (for example you've made a mistake in one of those sections) - see *pg 36*
- b) Edit or delete the singular event instance (for example you want to remove events that fall on public holidays) - see *pgs 26 to 32*

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Home > My Portal > Our Events & Activities > Bulk Edit Events

### Bulk Edit Events

The fields greyed out below are not available in Bulk Edit mode.

**Event/activity details**

Run by Age UK?

Yes

**New event/activity name**

Fun Walk N Run

**Organisation (Internal Use Only)**

Age UK Anytown

**Description**

Walk or run 5km

**Booking website URL**

**Image URL Desktop**

<https://th.bing.com/th?id/OIP.NdQaRbQVZxIosTZOuWlZiQHaE1?w=224&h=180&pc=7&p=5&pid=1.7>

**Image URL Mobile**

**Start Date and Time \***

30/04/2021 9:00 AM

**End Date and Time**

30/04/2021 10:30 AM

SAVE

Once you have finished making changes to the record, press the **Save** button. The system replicate these updates to rest of the records in the series.

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK

Event ID	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
Fun Walk N Run	Weekly	26/06/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<input type="checkbox"/>
Fun Walk N Run	Weekly	22/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<input checked="" type="checkbox"/>
Fun Walk N Run	Weekly	29/05/2021 9:00 AM	Age UK Anytown - Head Office	16/04/2021 10:53 AM	<input type="checkbox"/>
Fun Walk N Run	Weekly	05/06/2021 9:00 AM	Age UK	16/04/2021	<input type="checkbox"/>

- View details
- Edit
- Edit this series of events
- Delete
- Delete this series of events**
- Deactivate this series of events

If you need to remove the event series from both the local directory and the portal database:

1. press the down arrow next to one of the records
2. Select **Delete this series of events.**

In the confirmation pop-up, select **Bulk Delete.**

Bulk Delete

Are you sure you want to bulk delete this series of events?

Bulk Delete

Cancel

The system will flag the records for deletion and remove them from the portal and local directory by the end of the day.

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.



Create Event/Activity Run by Age UK

Create Event/Activity NOT Run by Age UK

Event/Activity Run by Age UK

Event ID ↑	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On	
Fun Walk N Run	Weekly	01/08/2020 9:00 AM	Age UK Anytown - Head Office	28/07/2020 5:22 PM	▼
Tuesday Lunch Club	Daily	06/10/2020 12:30 PM	Age UK Anytown - Head Office	28/09/2020	▼
Tuesday Lunch Club	Daily	07/10/2020 12:30 PM	Age UK Anytown - Head Office		
Tuesday Lunch Club	Daily	08/10/2020 12:30 PM	Age UK Anytown - Head Office		

- View details
- ✓ Edit
- Edit this series of events
- Delete
- Delete this series of events
- Deactivate this series of events

If you need to remove the event series record from the local directory but not delete them from the portal database, then:

1. press the down arrow next to one of the records.
2. Select **Deactivate this series of events**.
3. In the confirmation pop-up, select **Bulk Deactivate**.

**Bulk Deactivate** ×

Are you sure you want to bulk deactivate this series of events?

Bulk Deactivate

Cancel

Event/Activity Run by Age UK

Event/Activity NOT Run by Age UK

Inactive Event/Activity Run by Age UK

Inactive Event/Activity NOT Run by Age UK

BPP - Third Party Pending/Failed Events

Head Office

All inactive records will still be stored within the portal under the **Inactive Event/Activity** lists.

To access these, press the Event/Activity Run by Age UK button and **select either the list of events run by Age UK or Not run by Age UK.**

If you want to make them visible again in the local directory, click the down arrow beside the record and select **Reactivate this series of events.**

Event ID ↑	Start Date and Time	Recurrence Schedule	Associated Age UK	Modified On	
000testUAT TEST 08 09 2020	04/09/2020 10:36 AM	Daily	Age UK Anytown - Head Office	08/09/2020	⌵
000testUAT TEST 08 09 2020	04/09/2020 10:36 AM	Daily	Age UK	08/09/2020	⌵

View details

Reactivate this series of events

Then in the confirmation pop-up, select **Bulk Reactivate**.

The system will update the records, and they will be visible in the local directory the following working day.

**Bulk Reactivate**

Are you sure you want to bulk reactivate this series of events?

**Bulk Reactivate** **Cancel**

# APPENDICES



# APPENDIX 1: THIRD PARTY VETTING

We've put in place this vetting process to help make sure that third party providers have adequate insurance to cover their services before they are displayed in the local directory on the national Age UK website.

This means that certain organisations will receive an automated email from Age UK asking for their public **liability insurance** and **public indemnity insurance** where appropriate.

When creating or updating an event record/series, if you select **No** in this section, it will trigger an email to be sent to the provider.

**Is the third party provider one of the following: \***

• A council or government service • An NHS service provider or GP surgery • A Citizens Advice office or branch of a national volunteering organisation (e.g. British Red Cross)

☐ Yes ☒ No

*\*\*Please ensure their correct and current email address has been added to the record.*

The email will ask the provider to complete a business information form, which will need to be **returned to Age UK within 30 days**. Until we receive the completed form, their details will not be listed the directory.

We've created a view in the portal, where you can check which providers are still pending or have failed the vetting process.

To access this, click on *Event/Activity Run by Age UK* button, and from the drop-down list, select **BPP – Third Party Pending/ Failed Events**.



This will refresh the page and display the names of the events and the current vetting status.

# 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/event 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 >		

# APPENDIX 3: THE DIFFERENCE BETWEEN EVENT AND SERVICE RECORDS

The service records you add to the portal/ local directory represent the services your organisation offer. These tend to be ongoing as they reflect your wider service delivery objectives.

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	29/09/2020 5:11 PM

Event/activity records represent an instance or repeated occurrence of an activity or support offering that takes place at a specific date and time.

Home > My Portal > Our Events & Activities

## Our Events & Activities

**Please note:** All of this information will show on the Age UK website's Local Directory and customers will see this.

Search Event or Activity

[Create Event/Activity Run by Age UK](#)

[Create Event/Activity NOT Run by Age UK](#)

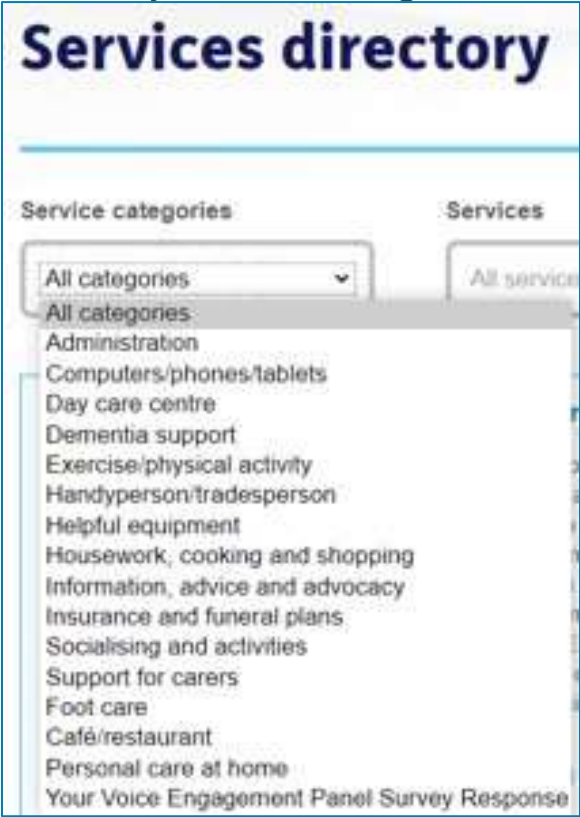
[Event/Activity Run by Age UK](#)

Event ID ↑	Recurrence Schedule	Start Date and Time	Associated Age UK	Modified On
Friday Lunch Club	Daily	02/10/2020 12:00 PM	Age UK Anytown - Head Office	29/09/2020 9:16 AM
Fun Walk N Run	Weekly	01/08/2020 9:00 AM	Age UK Anytown - Head Office	29/09/2020 9:16 AM
Test Walk Club	Monthly	28/10/2020 11:30 AM	Age UK Anytown -	29/09/2020 12:25 PM

The event records you add to the portal/ local directory can be for both a standalone activity and/ or be linked to a service.

Examples of standalone activities	Examples of events linked to a service
A weekly lunch club.	IT classes or courses that are part of a Digital Inclusion service offering.
A 5km challenge event to raise funds.	Art classes that are listed as an activity in your Dementia care pages.
	A fortnightly drop-in I&A clinic which is an additional offering to your on-going I&A telephone service.

Whether standalone or part of a service, it's good practise to add a service category to each event record you create. We added these categories to the local directory, so when people visit the website they will be able to filter their search to find locations, shops, services, signposts, and/ or events that have been categorised as offering the type of service they are looking for.



In addition to the filter options on the search pages, we have also added a button to each service page in the local directory. So those that view these pages can select this option to see all the events directly linked to that service.

**Find events and activities related to this service**

The results listed will be events tagged with the same service category used on the service record.

**Therefore if you want to link your event records to your existing service records, we recommend adding the same service category to both records.**

You can also use the *Additonal Notes* section on the service record to refer to the event/activities you run which are directly related to the service.

### Additional notes

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#### Sub heading 1

Events and Activities

#### Body text 1

We hold a regular arts and crafts club at our Carrington Cottage site. If you are interested in attending or would like to find out more, take a look at our events page to see when the next event will take place.

# 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).

