

# **Surrey Social Value Marketplace User Manual**

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THIS WEBSITE IS MANAGED BY

SURREY COUNTY COUNCIL

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Please ensure you also read our Terms and Conditions and our Privacy Notice.

If you would like to report an issue with this document, please email the Administrator:  
[social.value@surreycc.gov.uk](mailto:social.value@surreycc.gov.uk)

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# 1. Introduction

Welcome to the Surrey Social Value Marketplace. The Surrey Social Value Marketplace is co-designed by public, private and social sector organisations that are based in or deliver services within the county. This guide has been developed to outline how you can use the Social Value Marketplace to support our local communities.

## Vision

Our vision is for the public, private and social sectors in Surrey to work together so we can combine our efforts and resources and collectively use these to improve the social, economic and environmental wellbeing of our residents and local communities.

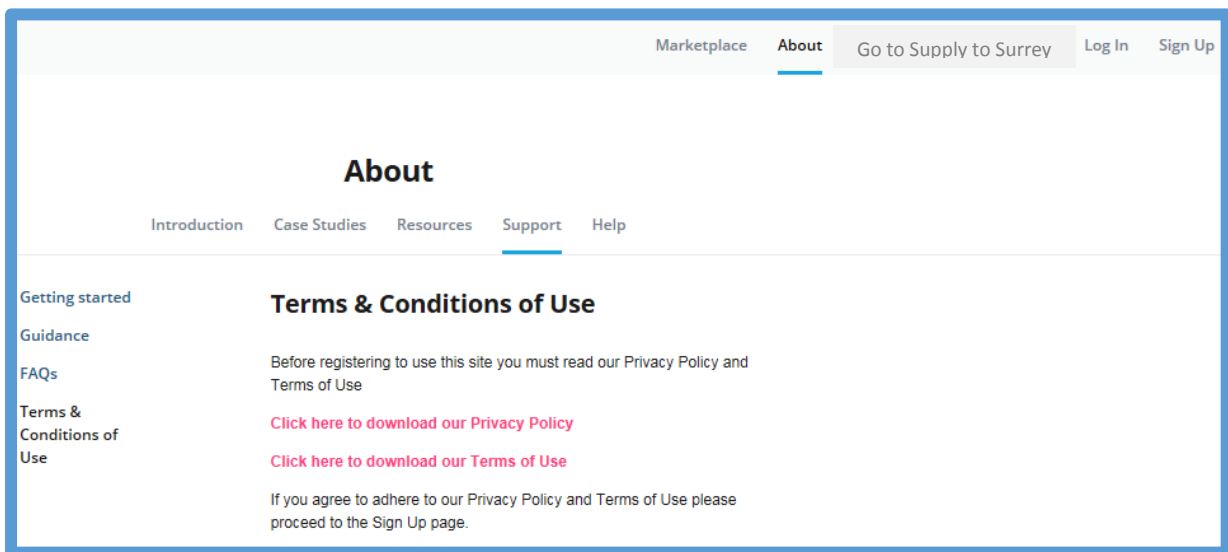
## Why was the Surrey Social Value Marketplace created?

The Surrey Social Value Marketplace was created to help us achieve our vision by:

1. Enabling the sharing of resources for the benefit of our residents and local communities
  - Organisations working in local communities can request support and resources based on the real needs of residents in a local area
  - Organisations that want to help can understand what communities need, where they need it and when they need it
2. Encouraging partnership working and collaboration across the public, private and social sectors
  - Organisations can create a profile and provide information about the services they provide
  - Organisations can connect, communicate with and support each other if they are working towards a common social, economic or environmental outcome
3. Securing additional value from public sector spending through the Public Services Social Value Act (2012)
  - Public sector organisations in Surrey can use the Surrey Social Value Marketplace to comply with legislation and target the social value commitments secured through their procurement process towards local community needs
  - Suppliers can use the Surrey Social Value Marketplace to identify local need that is within their capacity and capability to deliver and include them as part of their social value commitment when submitting bids for contracts.

## 2. Register to use the Surrey Social Value Marketplace

- 2.1. To use the Surrey Social Value Marketplace you must register your organisation. Before registering you must review the Terms and Conditions and the Privacy Policy. To view these documents, follow these steps:
- Click **About** on the main task bar at the top of the page
  - Click **Support**
  - Click **Terms & Conditions of Use** on the left hand side



- 2.2. If you are willing to adhere to the terms and conditions of use, you can continue with the registration process.
- Click **Sign Up** on the main task bar at the top of the page
  - Type in the required information
    - Organisation Name (Please enter the correct and full name of your organisation)
    - Your first name and surname
    - Organisation email address or your contact email if you have been nominated to represent your organisation. Please note this is the email address others will use to contact you.
    - Create and confirm your password
      - Please ensure you use a password that is not known to any other individual
      - Please be aware that you will only be allowed to sign up once your password meets the minimum criteria. Guidance will appear on the screen as you type.
  - Tick the box to confirm you agree to the Terms and Conditions and the Privacy Policy, then click the box labelled **Sign Up**.

Marketplace About Go to Supply to Surrey Log In Sign Up

## Sign Up

Share requests and offers with the right people

**Organisation Information**

Organisation Name

**Account Information**

First Name Surname

Email Address

Password

Confirm Password

[View Terms & Conditions and Privacy Terms](#)

I agree to the Terms & Conditions and Privacy Terms

**SIGN UP**

- 2.3. To avoid duplication only one profile should be set up for each organisation, however there can be multiple user accounts attached to the organisation profile.
- If you are the person setting up the account you will be regarded as the 'primary user'. As the primary user you will be able to invite other team members from your organisation to join the Surrey Social Value Marketplace once your account has been approved.
  - If someone in your organisation has set up an account, when you join the Surrey Social Value Marketplace and enter your organisation's name you will receive a message stating that "an organisation with that name already exists", and you will be given the option to join that organisation as a secondary user.

(See picture below)

Marketplace About Go to Supply to Surrey Log In **Sign Up**

**Organisation Information**

Organisation Name

ABC

An organisation with that name already exists. If you continue to sign up with this, then you will join that organisation after your account has been approved.

- 2.4. When you click **Sign Up** you will receive confirmation that your account has been created. Your account will need to be approved by the administrator and you will be notified by email when this has been completed.

**Log In**

Your account has been created. Your account will need to be approved before you can login. You will be notified by email when this is complete.

Email Address

Password [Forgot your password?](#)

**LOG IN**

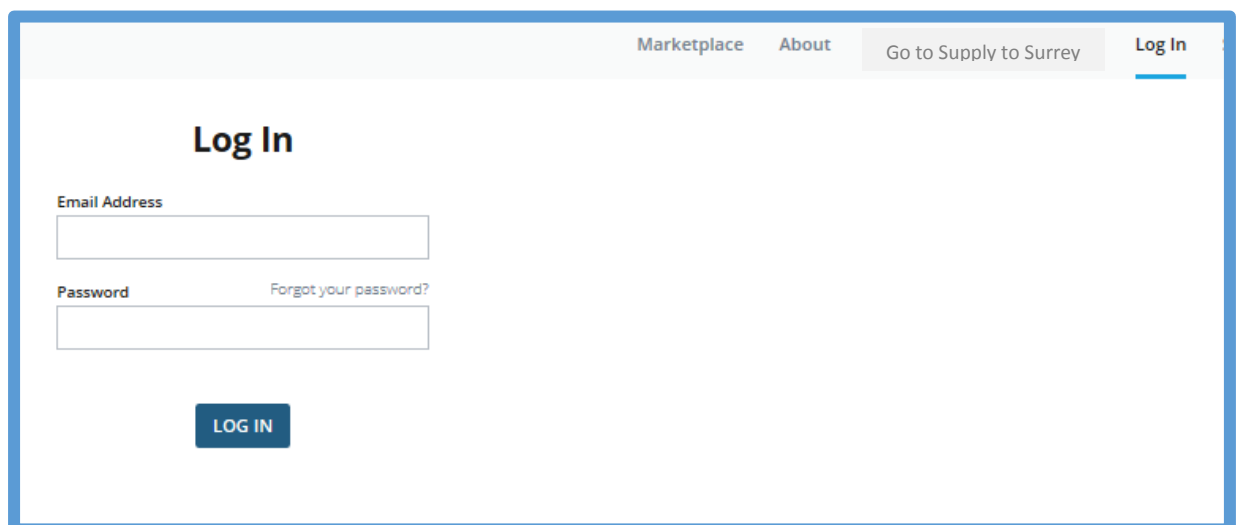
Please ensure you allow a minimum of 72 hours for this process.

### 3. Creating your organisation's profile

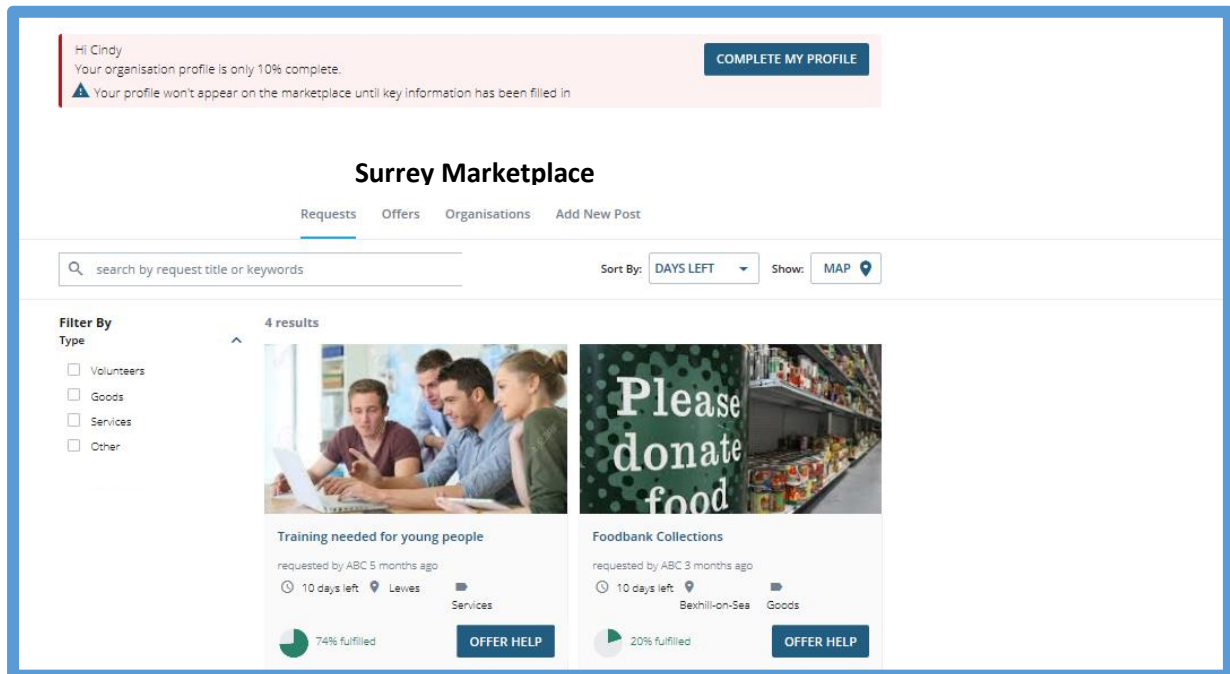
- 3.1. When your account has been approved, you will receive an email informing you that you can log in and access your account.



- 3.2. Click the link in the email or enter the following address in your browser <https://socialvalue.supplytosurrey.co.uk>
- 3.3. Click **Log In** at the top of the page on the main task bar and enter your email and password. You can reset your password at any time by clicking **Forgot your password?**



- 3.4. When you log in for the first time you will see a message on the top of the page informing you that you need to complete the **key information** in your organisation's profile before your organisation will appear on the **Organisations** page of the Marketplace.



- 3.5. To access / complete your profile you can either:
- Click the **Complete My Profile** button in the message box at the top of the page below the main task bar, or
  - Click **Account** on the main task bar at the top of the page, then click **Profile**
- 3.6. Enter the **Key Information** required. This information is required to validate your location and identify your posts.

(See picture below)







**General Information**

This information is optional. It will appear at the bottom of your posts and on your organisation's public profile, helping others to understand who you are.

**Logo**

 **ADD**  
A logo 250x250px works best.

**Header Image**

 **ADD**  
A banner 1040x288px will work best.

**Bio**

0 / 300

- 3.8. The **Contact Information** section is also optional. This information will appear on your profile page under the **Organisations** tab and at the bottom of your posts.

**Contact Information**

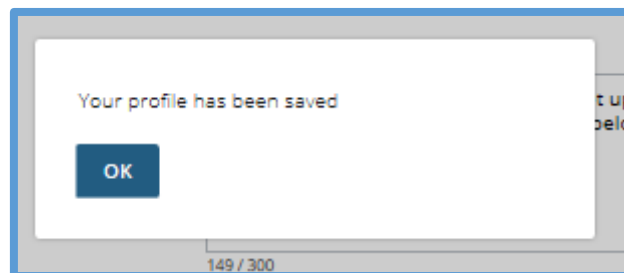
This information is optional. It will appear at the bottom of your posts and on your organisation's public profile, giving others quick access to more information.

**Website**

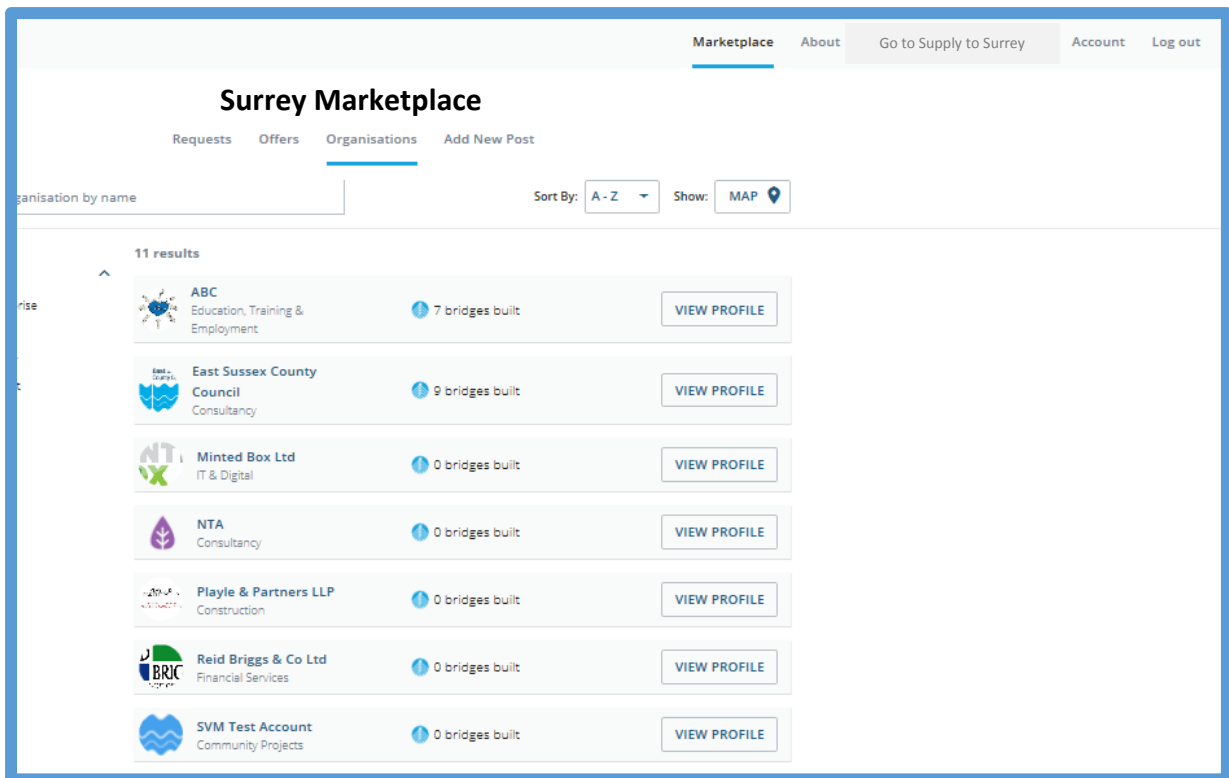
**Phone Number**

**SAVE PROFILE**

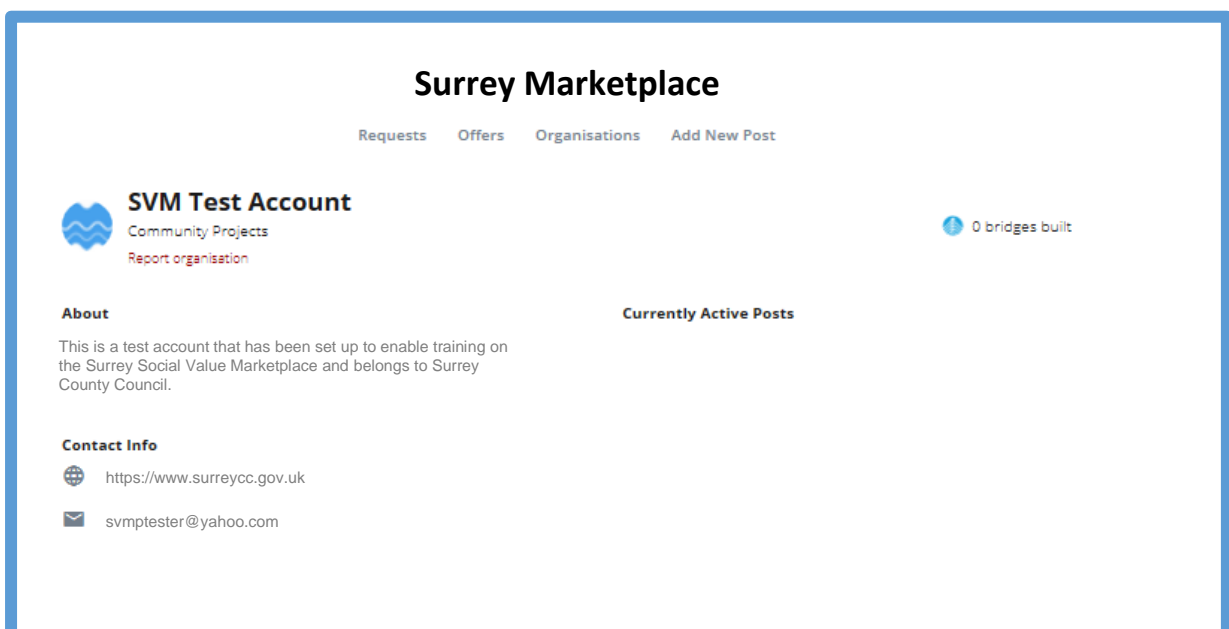
- 3.9. When you have completed your profile, click **Save Profile** and you will receive confirmation that your profile has been saved.



- 3.10. To view your organisation's profile, click **OK** and scroll up to the main task bar at the top of the page. Click **Marketplace** and then click **Organisations**.



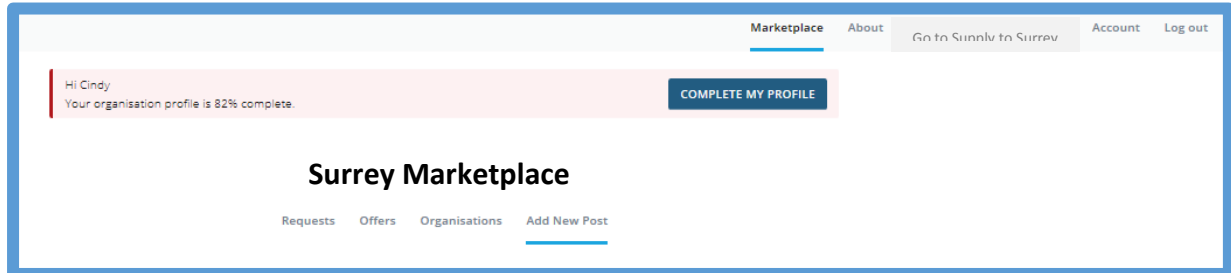
3.11. When you find your organisation, click **View Profile**. The information visible to others will be based on the fields you chose to complete in your organisation's profile. You can change and/or update this at any time.



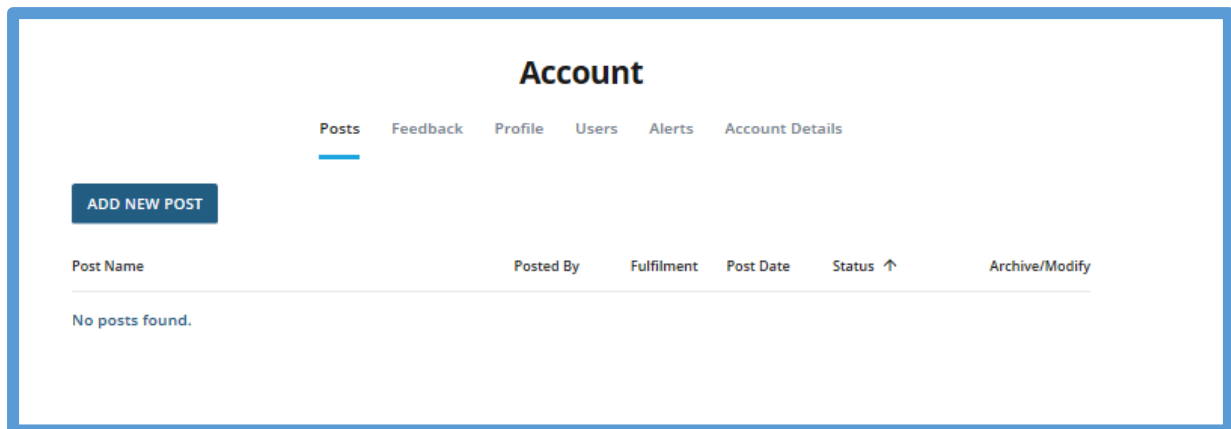
## 4. Posting an offer of help and/or post a request for help

4.1. You must be logged into your account to post an offer of help and/or post a request for help. There are two way that you can do this

a) If you are on the **Marketplace** page you can click **Add New Post**, or



b) Click **Account** on the main task bar, then click **Posts** and **Add New Post**.



4.2. You must ensure you have read the **Terms and Conditions** and the **Privacy Policy** before you add a new post, as you will be required to confirm this before your offer and/or request can be submitted for approval. You can choose to post an offer or request but you cannot offer help and request help in the same post.

(See picture below)

**Surrey Marketplace**

Requests   Offers   Organisations   Add New Post

**Before you begin...**  
Please take a moment to ensure you have read through our [guidance information](#)

I have read and understood the Marketplace Terms & Conditions

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**Post Type**  
 Request For    Offer Of

All offers made on this site must be available within the County of Surrey

**Post Title**

**Post Location**  
 Or

This will help people find your post in the map view

- 4.3. In the **Post Title** box, you should describe the type of support you are requesting and/or the type of help you are offering. The clearer you are, the easier it will be for other organisations to understand what you are requesting and/or offering. Some examples could be: Foodbank Collection; Volunteers for Sports Event; Furniture needed; Professional Legal Advice; Volunteers for Website Design; Apprenticeship Opportunities Available; Free Training Courses, etc.
- 4.4. When entering the location of the offer / request please note the following:
- a) Requests for help will only be approved if the organisation requesting the help is based in the county of Surrey.
  - b) Offers of help can be made by any organisation based anywhere, however the offer must be delivered within the county of Surrey.
  - c) Ensure you enter the exact postcode of where the help is being requested and/or where the offer is available.
- 4.5. To help you better promote your offer and/or request, you can upload images or add a web link / URL to a video. The use of media is optional; if you choose to use media, please ensure you have read and understood our Privacy Policy and have obtained explicit consent to use the media as you will be required to confirm this in order to publish your post.

(See picture below)

The image shows a form interface with the following sections:

- Media:** Contains two buttons: "ADD IMAGE" and "ADD VIDEO".
- Description:** Features a large text input area. Above the area are formatting icons for Bold (B), Italic (I), Underline (U), and two bulleted list icons. Below the text area is a character count "0 / 500".
- Tags:** Includes a text input field with the placeholder text "Use a space to separate tags". Below the field is a small text note: "Tag your offer or request to make it easier for organisations to find when they search the marketplace e.g #communityproject".

4.6. In the **Description** box, you should provide a summary of the request / offer. This is your opportunity to outline why other organisations should either provide you with the help you are requesting or claim the help you are offering. The more information you provide the easier it will be for other organisations to make their decision.

4.7. To make your post easier to find you can **add tags**, for example #volunteers #training. This is optional - you can still publish a post if you choose not to use tags.

4.8. The Surrey Social Value Marketplace can only be used to request and/or offer **non-financial** support. However, if you are fundraising and have a website set up for this purpose, you can copy the link into the **Crowdfunding URL** ask people to donate to your cause.

(See picture below).

This is optional so you can still publish your offer / request without a crowdfunding link.

The image shows a form with three main sections:

- Crowdfunding URL:** A text input field with a placeholder text: "Add a crowdfunding link so others can help you raise money."
- Expiry Date:** A date picker showing "20 December 2019 (Default)". Below it, a note states: "The default expiry date is 3 months. After that, your post will be archived and you will need to update the offer/request with a new date."
- Type:** A list of four radio button options: "Volunteers", "Goods", "Services", and "Other".

4.9. To meet requests when they are needed and take advantage of help when it is available, it is important to keep posts up to date. The default date for expiry on all posts is 3 months.

After this period your post will be archived into your account. You can edit the date in your account profile at any time to keep the post visible and live.

4.10. To make it easier for organisations to find requests and offers, you must indicate the **Type** of resource you are looking for.

(See picture below)

**Surrey Marketplace**

Requests Offers Organisations Add New Post

**Before you begin...**  
Please take a moment to ensure you have read through our [guidance information](#)

I have read and understood the Marketplace Terms & Conditions

**Post Type**  
 Request For  Offer Of

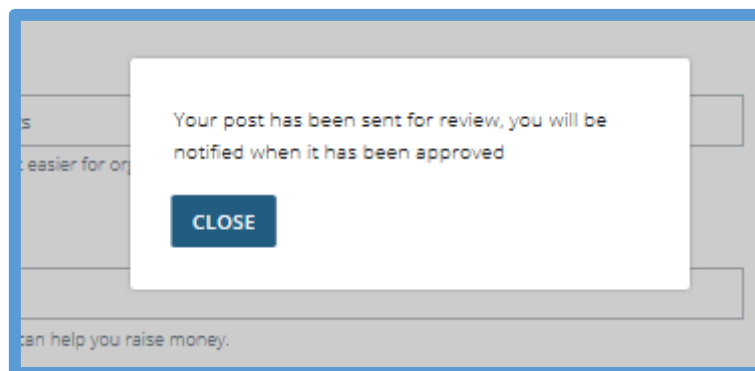
All offers made on this site must be available within the County of Surrey

**Post Title**  
Add a title

**Post Location**  
Add a postcode Or [CHOOSE ON MAP](#)  
This will help people find your post in the map view

**PUBLISH POST**  
**SAVE DRAFT**  
**PREVIEW**

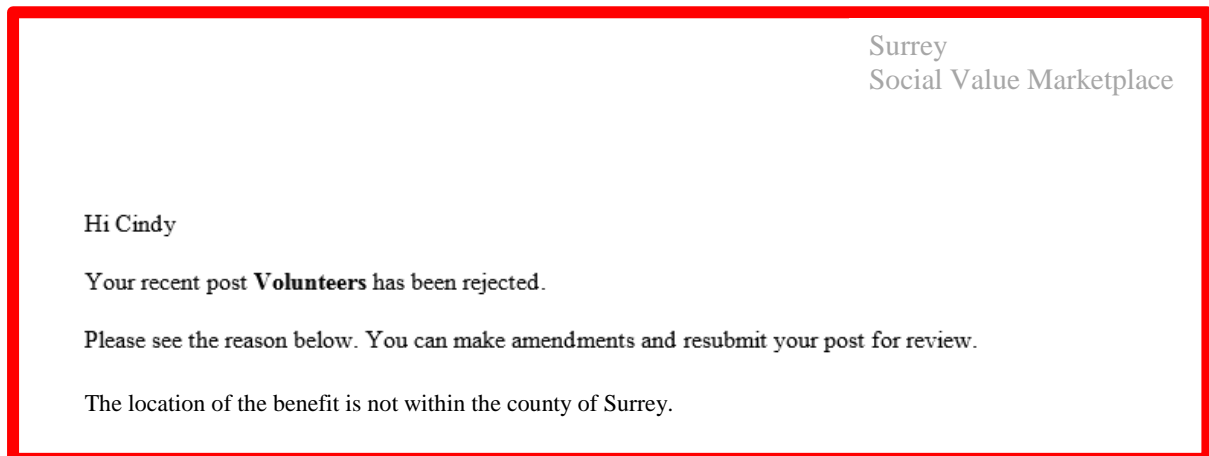
- 4.11. If you don't have all the information you need you can click **Save Draft** and the post will be saved in your account.
- 4.12. If you have completed the information, then click **Preview** to view what others will see on the Marketplace. When you are ready to make your post live click **Publish Post**.



- 4.13. All posts are reviewed by the administrator before they are published on the Marketplace.

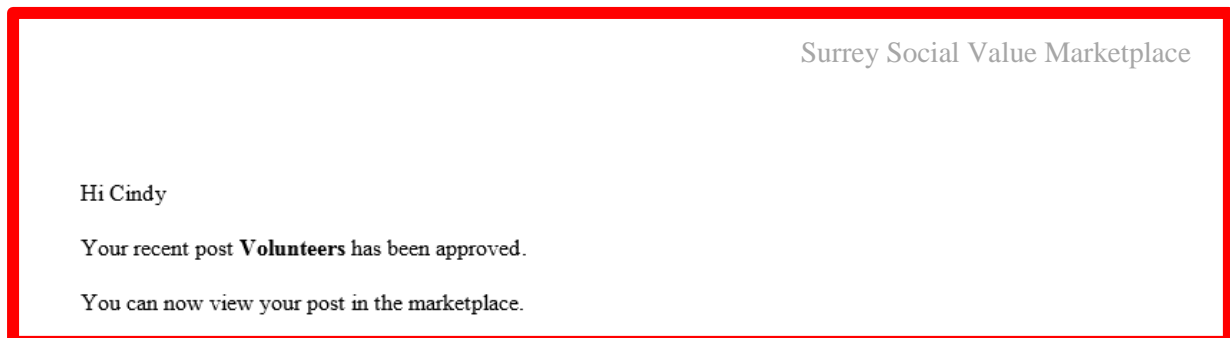


- a) If there is an issue with your post you will receive an email from the administrator outlining the reason why your post was not published.



- a) If there are no issues with your post you will receive an email to inform you that your post has been published and is live on the Marketplace.

When your post has been published other organisations will be able to view your requests / offers and will contact you if they can help or want the resources you are offering.



#### 4.14. Key points to remember:

- It is entirely up to organisations to decide who to work with
- By posting an offer or request there are no guarantees that an organisation will respond to your request or claim your offer
- The posts made by organisations can be changed at any time

## 5. Responding to a request for help and/or claiming an offer of help

- 5.1. To view requests and/or offers, click **Marketplace** on the main task bar at the top of the page. Click **Requests** or **Offers** to view what organisations need or how organisations can help.
- You can use filters, sorting tools and map functions to specify locations, types of requests/offers and expiry dates.
  - The fulfilment level indicates how much of the request has already been met, or how much of the offer has already been claimed.

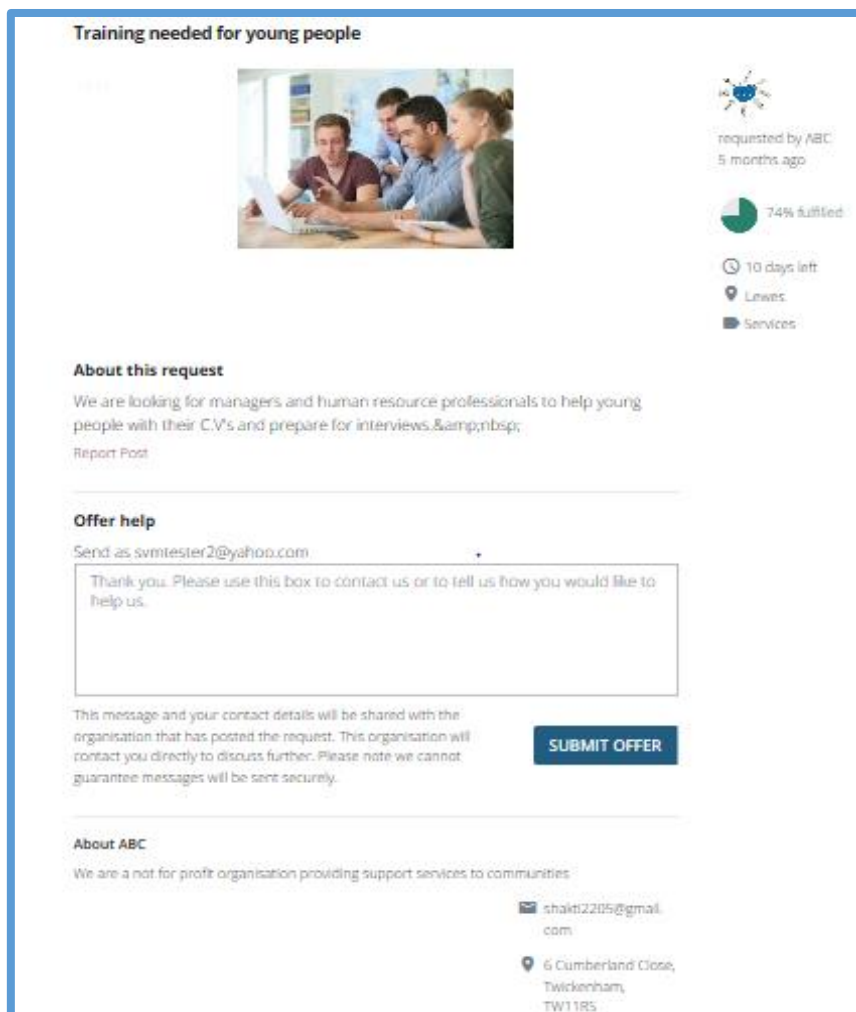
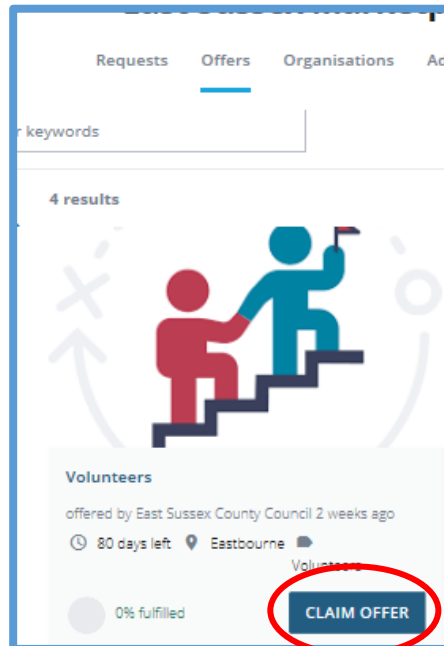
The screenshot displays the Surrey Marketplace interface. At the top right, the word "Marketplace" is visible. The main heading is "Surrey Marketplace". Below this, there are navigation tabs: "Requests" (which is active), "Offers", "Organisations", and "Add New Post". A search bar is located below the tabs, with the placeholder text "search by request title or keywords". To the right of the search bar, there are sorting and display options: "Sort By: DAYS LEFT" and "Show: MAP".

On the left side, there is a "Filter By Type" section with four checkboxes: "Volunteers", "Goods", "Services", and "Other". Below this is a "Crowdfund East Sussex" section with a "START NOW" button.

The main content area shows "4 results". Two request cards are visible:

- Training needed for young people**: requested by ABC 5 months ago, 10 days left, Lewes, Services, 74% fulfilled, and an "OFFER HELP" button.
- Foodbank Collections**: requested by ABC 3 months ago, 10 days left, Bexhill-on-Sea, Goods, 20% fulfilled, and an "OFFER HELP" button.

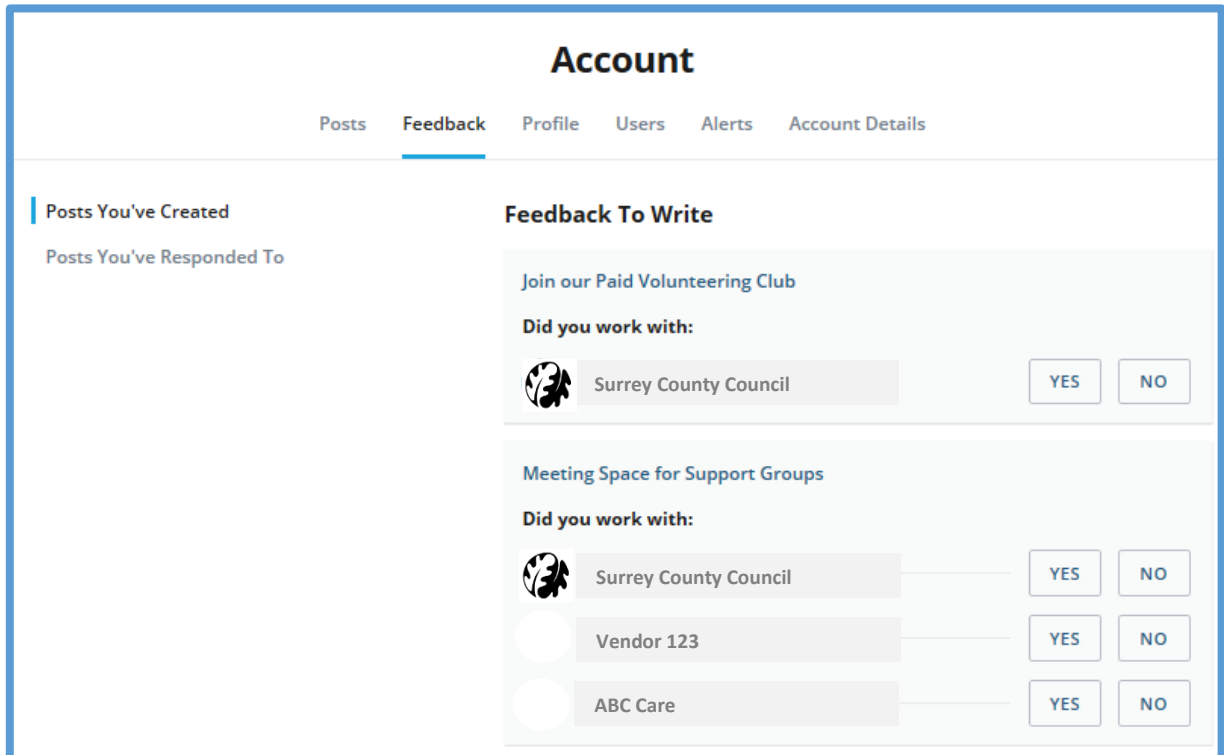
Click **Offer Help** to respond to a request or **Claim Offer** if you'd like to use the help being offered.



- 5.2. You are advised to review the information about the post and the organisation before you submit an offer of help or claim an offer of help.
- 5.3. To offer help or claim an offer, you should use the text box provided to send an introductory message to the organisation that posted the request or offer.
  - a) If responding to a request, you should inform the organisation why you want to help and how you can help them.
  - b) If responding to an offer, you should inform the organisation why you need the help they are offering and how much of their help you need.
- 5.4. Once you have completed your message, click **Submit Offer** in response to a request or **Claim Offer** in response to an offer of help.
- 5.5. An email with your message will be sent to the organisation that posted the offer or request you responded to, and they will contact you if they are interested in working with you.

## 6. Giving and receiving feedback

- 6.1. It is a mandatory requirement for all organisations to provide feedback on the social value delivered or received through the Social Value Marketplace. Feedback will be used to ensure the continuous improvement of the Marketplace and could be used in case studies to underline the positive impact of the tool.
- 6.2. When you respond to a post and send a message to an organisation to either **Offer Help** or **Claim Offer**, it is automatically logged in the **Feedback To Write** section of your account.

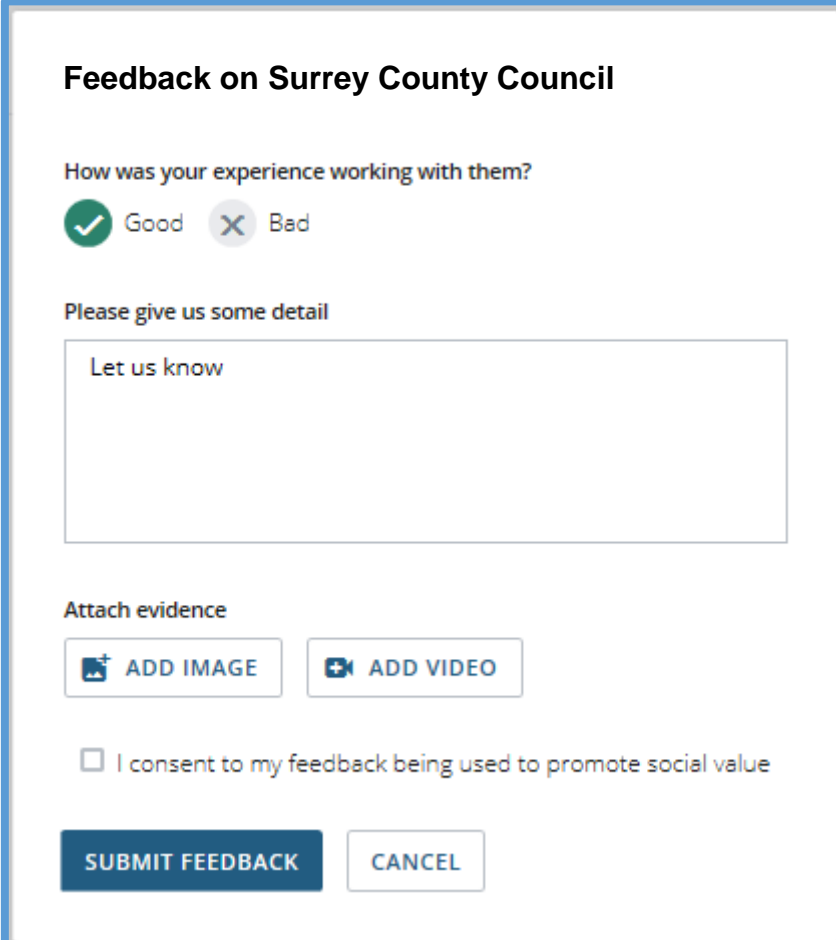


- 6.3. In the **Feedback** section, you can view feedback based on:
  - a) **Posts You've Created** - a list of organisations that responded to your posts will automatically be created in this section
  - b) **Posts You've Responded To** - a list of the organisations whose posts you responded to will automatically be created in this section
- 6.4. In both **Posts You've Created** and **Posts You've Responded To**, feedback is sorted as follows
  - a) **Feedback to Write** – In this section you need to confirm if you worked with an organisation or not.

- b) **Past Feedback You've Written** – In this section you will find information on the feedback you have already provided and shared with the organisation(s) you worked with and the administrator
- c) **Feedback you have received** – In this section you find information on the feedback you have received from others.

6.5. If you select “No”, this will be deleted from your profile and no further action is required by you.

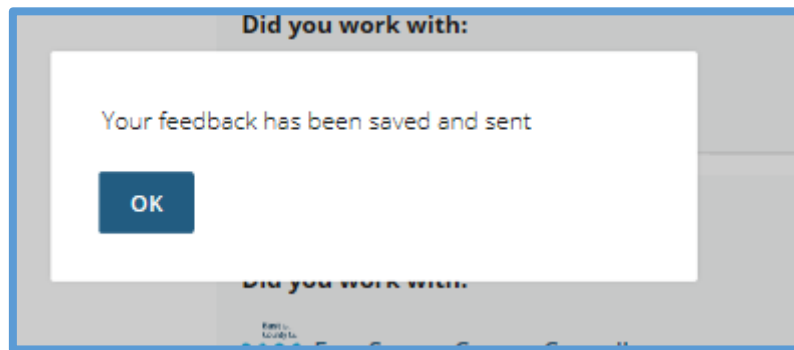
6.6. If you select “Yes”, you will be required to provide further information.



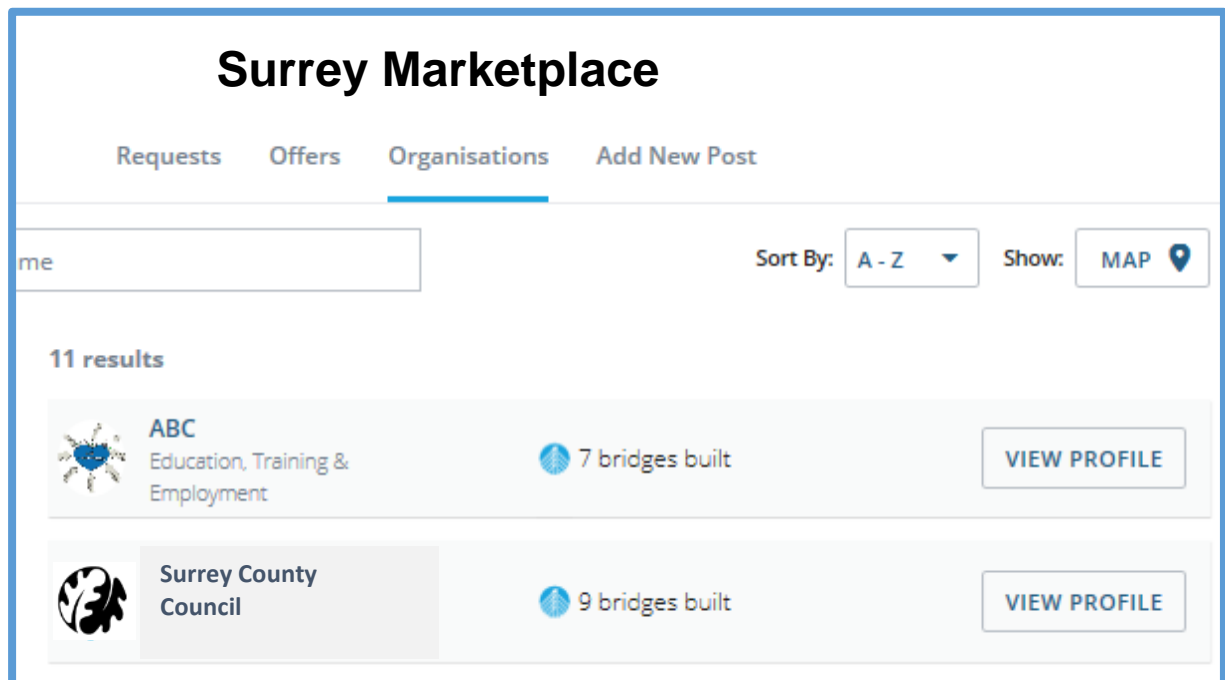
The screenshot shows a feedback form titled "Feedback on Surrey County Council". The form asks "How was your experience working with them?" and provides two radio button options: "Good" (with a green checkmark icon) and "Bad" (with a grey 'X' icon). Below this is a text input field with the placeholder text "Let us know". Underneath the text field is an "Attach evidence" section with two buttons: "ADD IMAGE" and "ADD VIDEO". At the bottom of the form is a checkbox labeled "I consent to my feedback being used to promote social value" and two buttons: "SUBMIT FEEDBACK" and "CANCEL".

- Provide feedback on your experience with working with the organisation
- Provide details on what benefits you received or provided
- Attach an image or add a link to a video as evidence that you received or provided the benefits
- If you add an image or video link you must confirm you have explicit consent to use the media

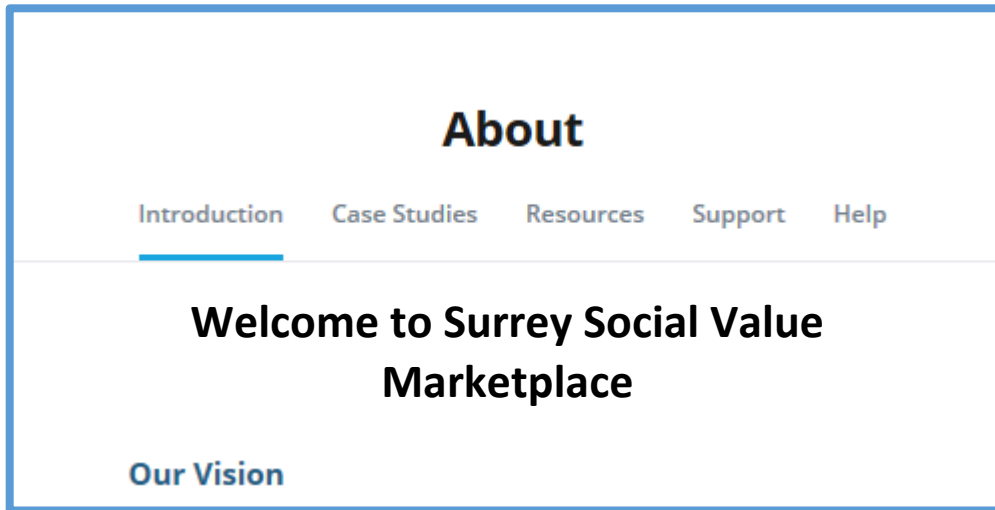
- Tick the box to provide consent to your feedback being used to promote social value
- Click **Submit Feedback**



- 6.7. When you submit your feedback, it will be sent to the company you worked with and the administrator of the Marketplace.
- 6.8. When both you and the organisation you worked with complete the feedback then the **Bridges Built** icon on both your organisations profiles will increase by one.



## 7. The “About” Page

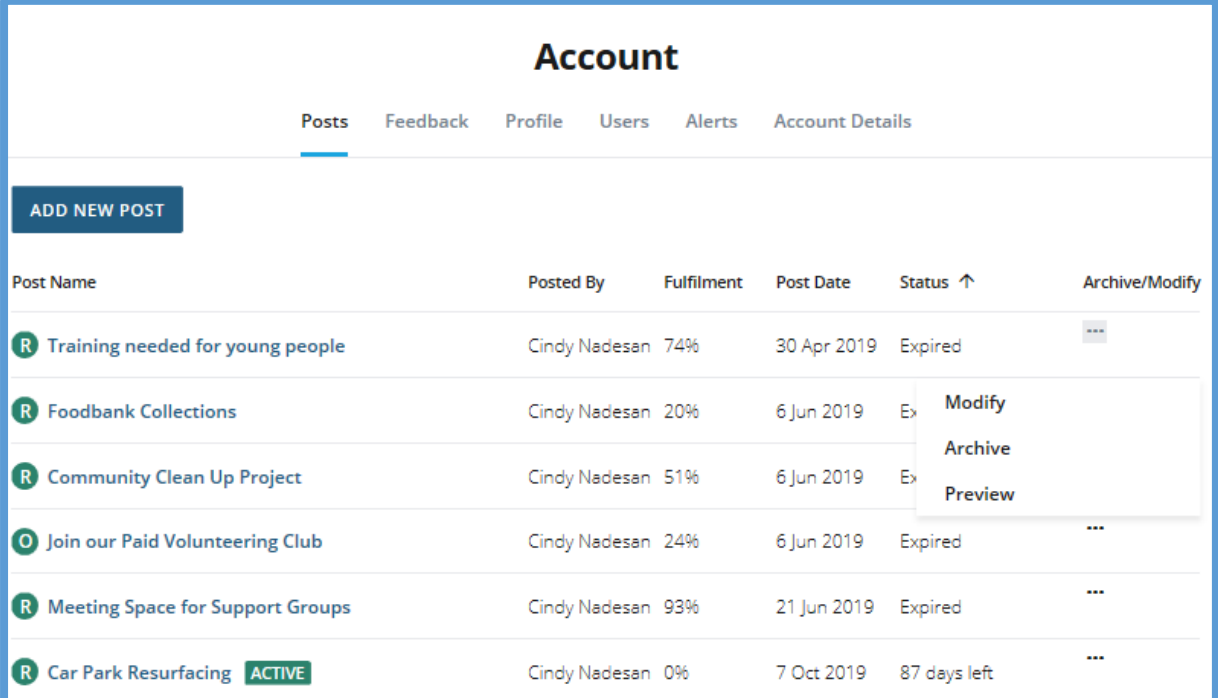


- 7.1. Click **Case Studies** to learn more about how other organisations are delivering social value.
- 7.2. Click **Resources** to find useful links to information and other websites.
- 7.3. Click **Support** to
  - learn how to get started
  - download guidance
  - get answers to frequently asked questions
  - read the terms and conditions of use
  - read the privacy policy.
- 7.4. Click **Help**
  - for quick links to information and guidance
  - to access the **Contact Us** form to send a message to the administrator.



## 8. The “Account” Page

This section is only visible to you and the users attached to your account.



Account						
Posts   Feedback   Profile   Users   Alerts   Account Details						
ADD NEW POST						
Post Name	Posted By	Fulfilment	Post Date	Status ↑	Archive/Modify	
<b>R</b> Training needed for young people	Cindy Nadesan	74%	30 Apr 2019	Expired	...	
<b>R</b> Foodbank Collections	Cindy Nadesan	20%	6 Jun 2019	Ex	Modify Archive Preview	
<b>R</b> Community Clean Up Project	Cindy Nadesan	51%	6 Jun 2019	Ex	...	
<b>O</b> Join our Paid Volunteering Club	Cindy Nadesan	24%	6 Jun 2019	Expired	...	
<b>R</b> Meeting Space for Support Groups	Cindy Nadesan	93%	21 Jun 2019	Expired	...	
<b>R</b> Car Park Resurfacing <b>ACTIVE</b>	Cindy Nadesan	0%	7 Oct 2019	87 days left	...	

8.1. In the **Posts** section, you will see a list of all the posts made by your organisation including those that have expired.

- Posts marked “R” are the requests your organisation has made
- Posts marked “O” are the offers your organisation has made

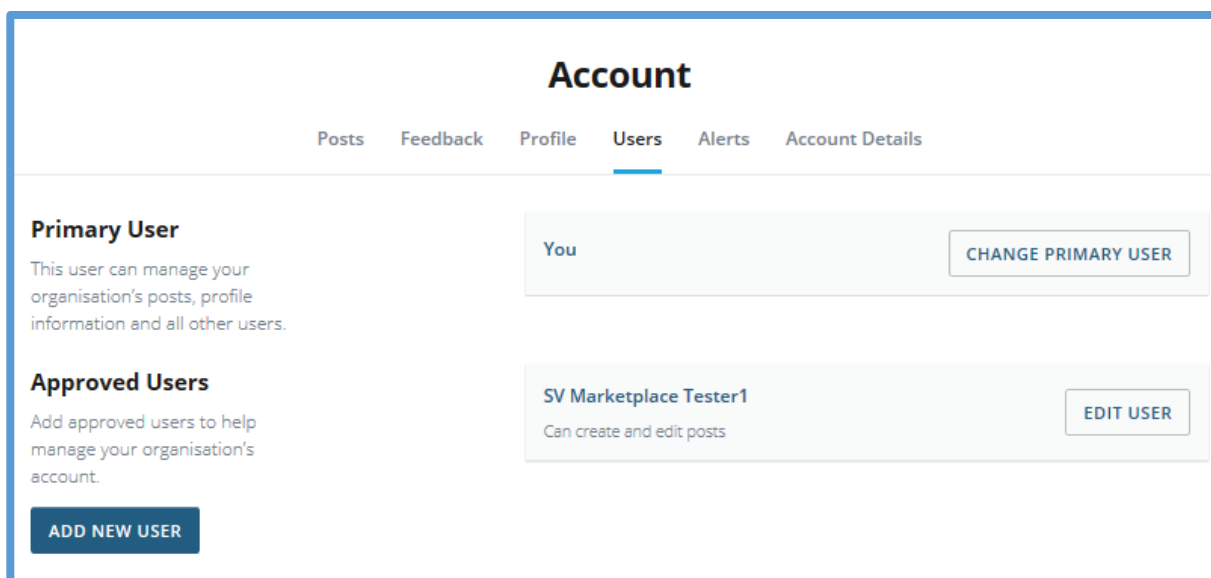
8.2. In the **Posts** section you can

- **Modify** your posts if you need to change the details
- **Archive** your posts if the timeframe for your request / offer has ended
- **Preview** your post to see the information that will be visible to other users

8.3. In the **Feedback** section you can view

- Feedback to you need to write
- Past Feedback You’ve Written
- **Feedback you have received**

- 8.4. In the **Profile** section, you will see the information that is visible on your organisation's profile.
- 8.5. In the **Users** section, you will see a list of users attached to your organisation's profile.



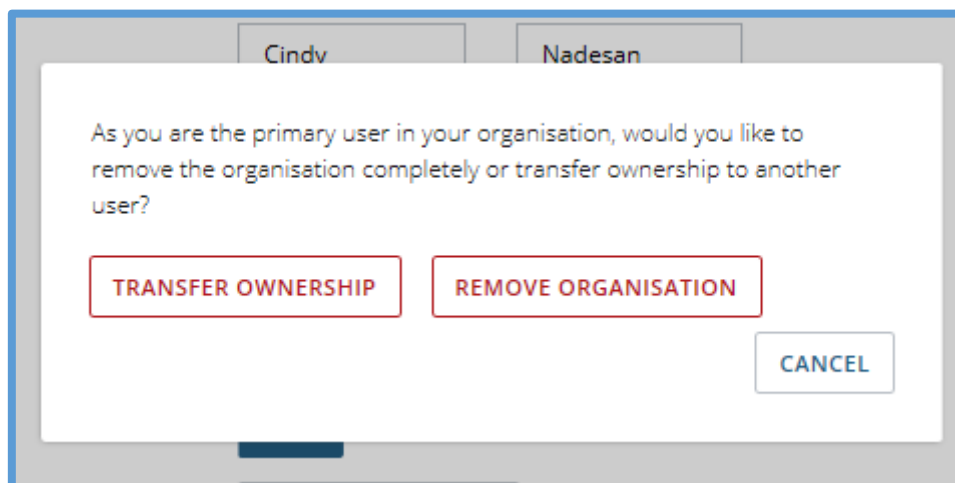
- 8.6. 'Primary Users' are the individuals that set up the account for the organisation. The primary user can:
- Make changes to the organisation's profile
  - Add and respond to offers and/or requests and provide feedback
  - Invite other users to join
  - Control rights of other users and enable other users to:
    - add/edit posts on behalf of organisation
    - edit organisations profile
    - add or edit other approved users
  - Make a request to the administrator to delete the organisation's account
- 8.7. Click the **Alerts** tab to select:
- How you would like to receive notifications - email and/or SMS (text message). If you select SMS then you must provide a mobile number.
  - What you would like to receive notifications about
  - The frequency that you want to receive notifications

8.8. Click the **Account Details** tab to:

- View or change your contact details
- Change your password
- Delete your account

8.9. To delete your account:

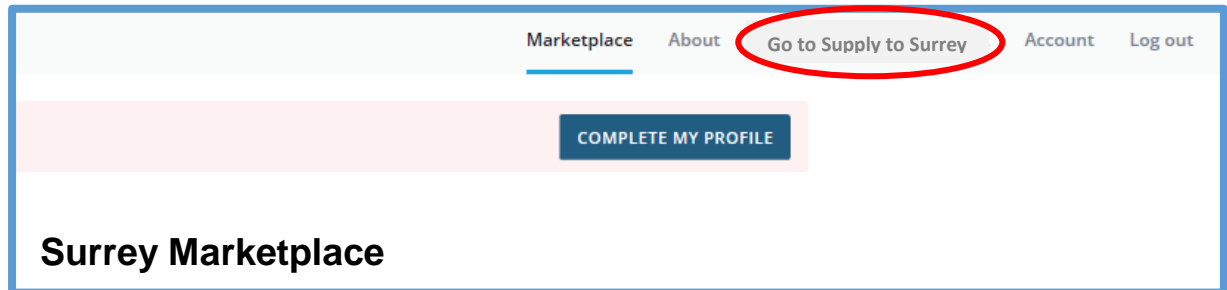
- If you are a secondary user you can delete your account by clicking **Delete** in your account profile
- If you are the primary user, you can either:
  - a) Transfer the ownership of the organisation's account to a secondary user and delete your contact details
  - b) Delete the organisation's account



To have a profile on the Marketplace, an organisation must have a primary user who accepts overall responsibility for the offers posted or commitments to fulfil requests.

## 9. Link to Supply To Surrey

- 9.1. Supply to Surrey is a resource to facilitate the growth of local organisations through the development of local supply chains.



- 9.2. Local organisations can find details of local contract opportunities from a range of other organisations including Local Authorities and other public sector bodies such as Councils, Universities and Health Services on the **Opportunities** tab.
- 9.3. You also have the opportunity to register on the site to promote your business and sign up for email alerts.
- 9.4. The site provides information about funding and resources for workforce skills development, local grants and events.

## 10. Contact the Marketplace Administrator

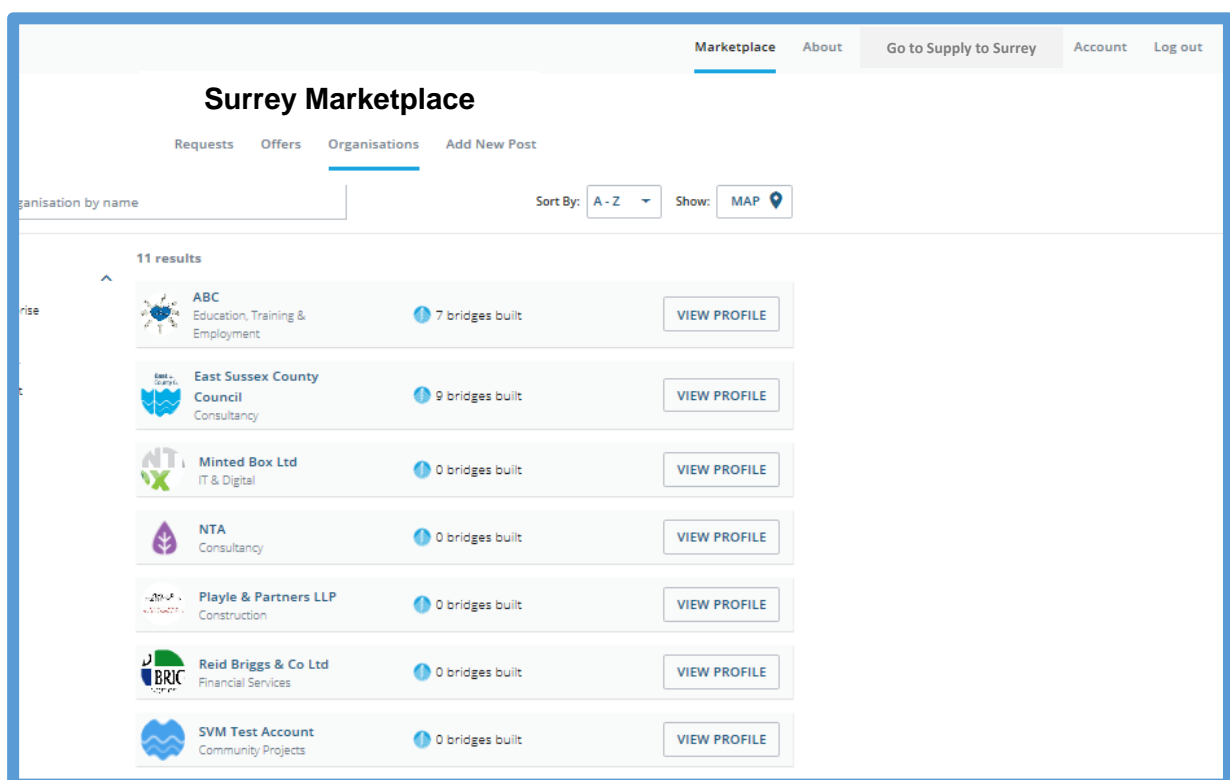
10.1. You can contact the administrator by email:

[social.value@surreycc.gov.uk](mailto:social.value@surreycc.gov.uk)

10.2. You can also use the **Contact Us** form on the **Help** tab which can be found on the **About** page.

10.3. If you need to report a post or organisation you can

- Use the “Report Organisation” link which can be found on each organisation’s profile
- Use the “Report Post” link which can be found on every offer or request.



The screenshot displays the Surrey Marketplace website interface. At the top, there are navigation links: Marketplace, About, Go to Supply to Surrey, Account, and Log out. Below this is the main header 'Surrey Marketplace' and a sub-header with 'Requests', 'Offers', 'Organisations', and 'Add New Post'. A search bar is present with the text 'organisation by name'. To the right of the search bar, there are options for 'Sort By: A - Z' and 'Show: MAP'. Below the search bar, it indicates '11 results'. The results are listed in a table-like format with columns for organisation name, description, and 'bridges built' count, along with a 'VIEW PROFILE' button for each.

Organisation	Description	Bridges Built	Action
ABC	Education, Training & Employment	7	VIEW PROFILE
East Sussex County Council	Consultancy	9	VIEW PROFILE
Minted Box Ltd	IT & Digital	0	VIEW PROFILE
NTA	Consultancy	0	VIEW PROFILE
Playle & Partners LLP	Construction	0	VIEW PROFILE
Reid Briggs & Co Ltd	Financial Services	0	VIEW PROFILE
SVM Test Account	Community Projects	0	VIEW PROFILE