



Order Approval

Client Guide
Vol. 5



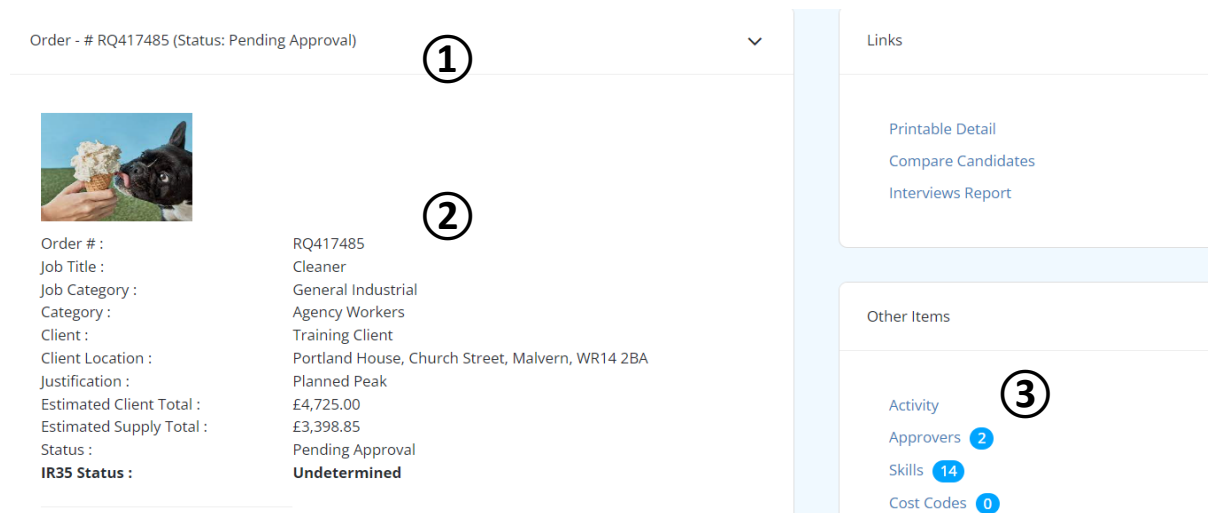
Content

Order Approval.....	3
How to Approve an Order.....	4
How to Reject an Order.....	6
Need More Support?.....	7



Order Approval

Your Order will have been sent to your assigned approver to action, before being sent to suppliers. If this is the case, your Order will be submitted into 'Pending Approval' status as opposed to 'Open' status.



Order - # RQ417485 (Status: Pending Approval)

Order # : RQ417485
 Job Title : Cleaner
 Job Category : General Industrial
 Category : Agency Workers
 Client : Training Client
 Client Location : Portland House, Church Street, Malvern, WR14 2BA
 Justification : Planned Peak
 Estimated Client Total : £4,725.00
 Estimated Supply Total : £3,398.85
 Status : Pending Approval
 IR35 Status : **Undetermined**

Links

- Printable Detail
- Compare Candidates
- Interviews Report

Other Items

- Activity
- Approvers **2**
- Skills **14**
- Cost Codes **0**

1. Order Status



- Pending Approval** – Order is pending approval with Approvers.
- Open** – Order is in Open status and Candidate submissions can be received.
- Rejected** – Order has been rejected by approver.
- On-Hold** – Order is on-hold. No more submissions will be received.
- Cancelled** – Order has been cancelled.

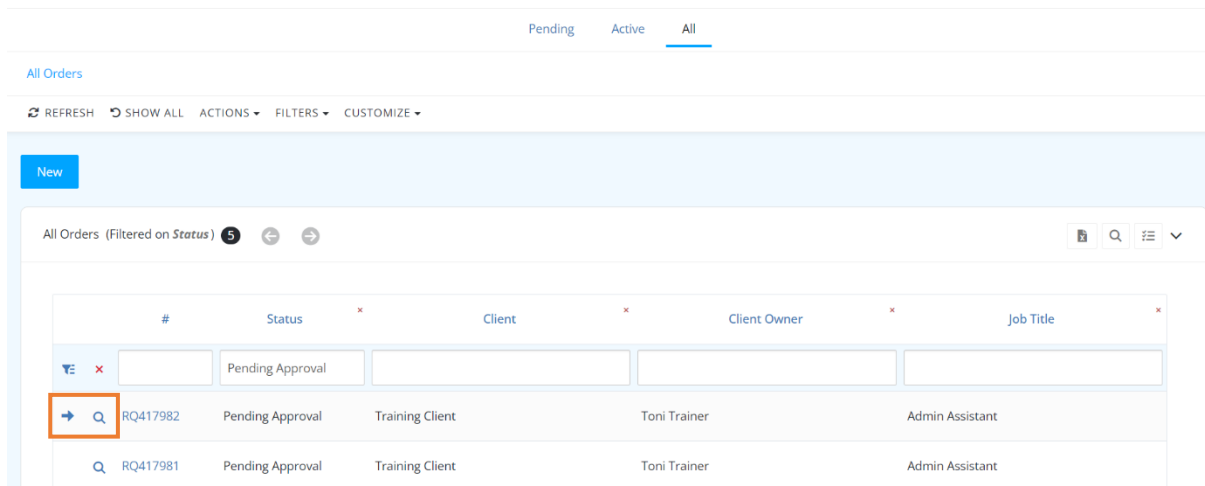
2. Order Summary – Basic summary of the Order details

3. Other Items – Sub Sections within the Order. Click through to see each stated section.

- You can see who your Order is pending approval with under the 'Approvers' section as highlighted above.
- Activity section will show you all the activity on Order in relation to who has actioned items, dates, and times.

How to Approve an Order

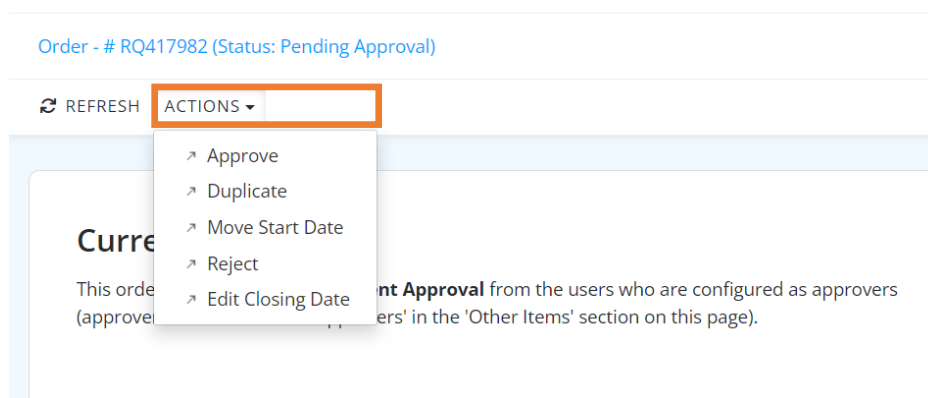
1. Open your Orders Navigational tab.
2. Click the  to show the search boxes.
3. Enter the Status box "Pending Approval" and select the drop down so that it prepopulates, and press enter.
4. Click into the  next to the Order Number (RQ) on the left-hand side, this will bring you to the order and this can be reviewed.



The screenshot shows the 'All Orders' page with tabs for 'Pending', 'Active', and 'All'. Below the tabs are options for 'REFRESH', 'SHOW ALL', 'ACTIONS', 'FILTERS', and 'CUSTOMIZE'. A 'New' button is visible on the left. The main content area shows 'All Orders (Filtered on Status) 5' with a search bar and a table of orders. The table has columns for '#', 'Status', 'Client', 'Client Owner', and 'Job Title'. The first row is highlighted with an orange box around the search icon and the order number 'RQ417982'. The second row is also visible with order number 'RQ417981'.

#	Status	Client	Client Owner	Job Title
RQ417982	Pending Approval	Training Client	Toni Trainer	Admin Assistant
RQ417981	Pending Approval	Training Client	Toni Trainer	Admin Assistant

5. If you are happy with the order and wish to accept it for distribution, then select the Actions Button and click approve.



The screenshot shows the 'Order - # RQ417982 (Status: Pending Approval)' page. At the top, there is a 'REFRESH' button and an 'ACTIONS' dropdown menu, which is highlighted with an orange box. The dropdown menu is open, showing options: 'Approve', 'Duplicate', 'Move Start Date', 'Reject', and 'Edit Closing Date'. Below the dropdown, there is a 'Current' section with a description: 'This order is currently in Pending Approval from the users who are configured as approvers (approver names) in the 'Other Items' section on this page.'

6. If you wish to add a comment you can do so in the comments box. Then click approve.

By approving this Order you are verifying and authorising that it is correct.

Comments

Go Back <Approve

7. You will then see the status as “The order is currently open to suppliers”.

Order - # RQ417982 (Status: Open)

🔄 REFRESH ACTIONS ▾

Current Status:

The order is currently **Open** to suppliers.



How to Reject an Order

1. Follow the above process but instead of choosing Approve click Reject.

Order - # RQ417982 (Status: Pending Approval)

REFRESH ACTIONS ▾

- Approve
- Duplicate
- Move Start Date
- **Reject**
- Edit Closing Date

Current
This order requires **Approval** from the users who are configured as approvers (approved by users in the 'Other Items' section on this page).

2. Leave comments with the reason why you have rejected and click **Reject**.

By rejecting this Order it will not be distributed to the supply chain.

Comments

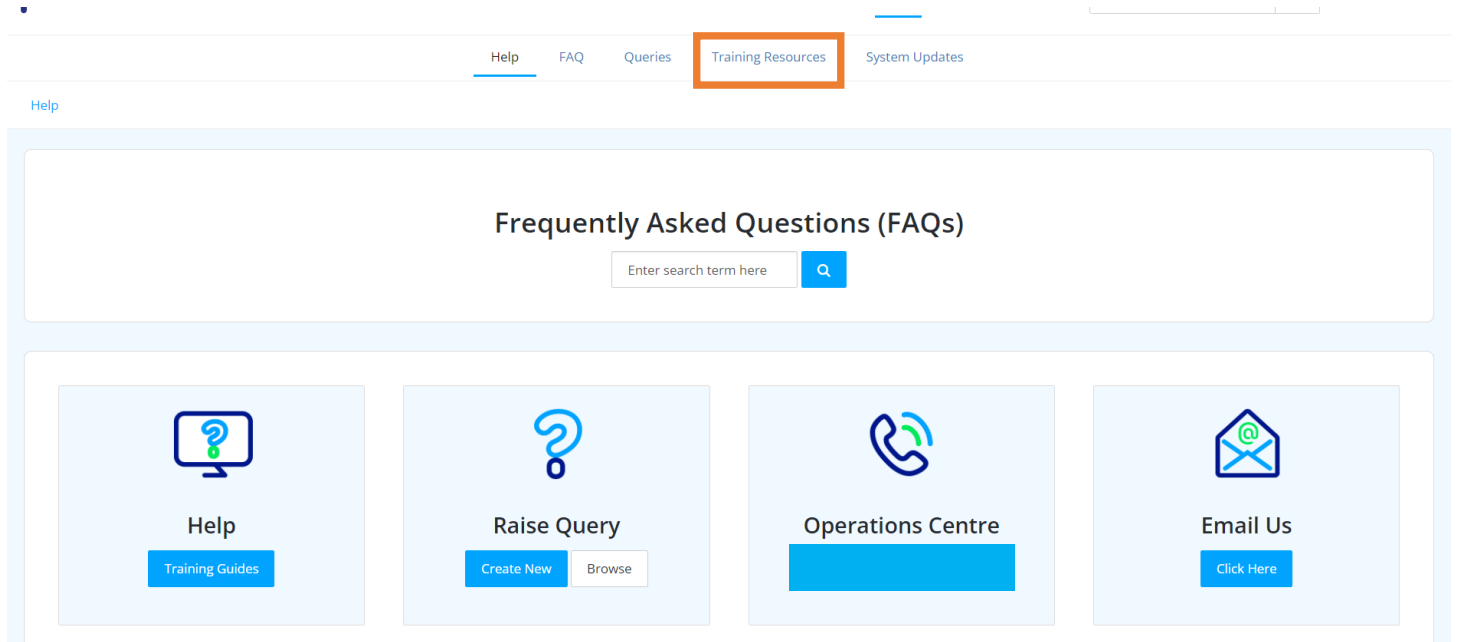
Allow Order To Be Resubmitted

Go Back < **Reject**



Need more support?

You can contact your Matrix Customer Success Executive or another member of the Customer Success Team for assistance with Matrix-CR.net through the following options:



The screenshot shows a navigation menu with the following items: Help, FAQ, Queries, Training Resources (highlighted with an orange box), and System Updates. Below the menu is a 'Help' section with the heading 'Frequently Asked Questions (FAQs)' and a search bar containing the text 'Enter search term here'. Below the search bar are four main support options, each with an icon and a button:

- Help**: Icon of a monitor with a question mark. Button: Training Guides
- Raise Query**: Icon of a question mark. Buttons: Create New, Browse
- Operations Centre**: Icon of a telephone handset. Button: [Redacted]
- Email Us**: Icon of an envelope with an @ symbol. Button: Click Here

Underneath your help tab you also have access to help guides and videos under 'Training Resources' as highlighted above.

The number for the Customer Success Team will be displayed on the live site.

