



Creating a New Order & Distribution of the Order

Client Guide
Vol. 2



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Creating a New Order


1. Click the 'New Order' button on your Home Screen

Main Dashboard

REFRESH

Priority Items - Click this link for full list of active transaction items

Priority	Steps Status	Relevant Date	#	Worker
Urgent	Open Orders with No Candidates	04-Dec-23	RQ417944	n/a
Urgent	Open/On-Hold Orders with Candidates Pending Client Review	04-Dec-23	RQ417914	n/a
On Track	Timesheet Pending Approval	30-Oct-23	SR5818199	Apple User

2. Fill out the Basic Order details. Search for the Job Title, Location and Justification via the  icon. Once completed, click to continue and save your Draft Order.

1 Basic Details 2 Additional Information 3 Related Information 4 Distribution Options

Complete New Order

Please complete the basic details of your Order. Please note, anything with an * is mandatory and requires an answer.

Category
 Agency Workers

Type of service

Job Title *

(Select a Job Title from the available list. If your job title is missing, please click [here](#) to request it.)

Client Location *

Waste and Recycling Depot, Pendragon Close, Malvern, WR14 1GR

Justification *

Select a reason why you are creating this Order



3. On the next Additional Information Page, fill in all required Order details. Ensure to add further information for agencies in the free text description box. This can be why it would be good to work for your company, if the role is Hybrid working, what the shift pattern will be etc.

Shift Function – If you require shifts, please select Yes, and refer to the document “Order with shifts”.

Description

Where Necessary Please Provide A Description

Shifts

No

Will this Order require Shifts?

4. Enter in required Start & End Dates, Start and End Times, Hours per Week, and how many candidates are needed for the role.

Please note: The maximum initial duration available for this order is 365 days.

Start Date *

End Date *

Start Time *

09 : 00

Estimated daily start time.

End Time *

17 : 30

Estimated daily end time.

Hours Per Week *

What are the Hours Per Week?

Candidates *

1

How many Orders are needed to be met?



5. Please note, within this section and depending on the Client, there can be additional options and questions. If you are unsure, please contact your customer Success Executive

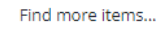








Related Information





On the next page you will be present with related information, these are additional fields that can be added.

Skills Attributes – these may already be pre-loaded to the Job Title. You can search and add additional skills.

Qualifications Attributes – these may already be pre-loaded to the Job Title. You can search and add additional Qualifications.

- To action the above click . Once clicked a separate pop up will appear where you can search, select via the tick boxes, and click . Ensure you click  when you have finished adding the required skills. You can remove these by clicking .

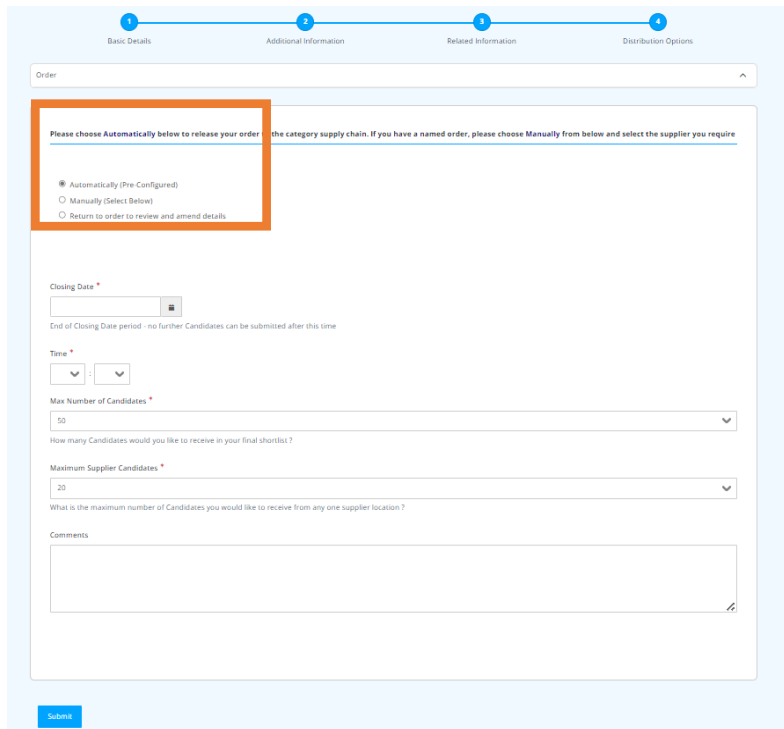
Screening Questions – these are free-type questions you can ask for responses to when Candidates are submitted. To add a new question, click  and then type your Statement and use the Weighting to determine the importance to the role This separate pop-up box is shown above. Click  to add the Screening Question to the Order. You can remove these by clicking .

Documents – these may already be pre-loaded to the Job Title. You can add new documents e.g., Job Description or Person Specification by clicking  where a separate pop up will appear. You can then search the document type you are uploading via the  and upload the file from your computer via the  icon. Click  when you have finished uploading the document.




When you are happy with the Candidate Criteria, click  to continue the Order creation and the next step will be to distribute the order.



Order Distribution


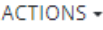
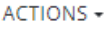


Distribution Options

- a. Automatically will distribute to all suppliers enrolled to supply to this Order's job category.
 - b. Manually you can determine which suppliers the Order is sent to. Search Suppliers via the  icon and select them by the  icon. Click  when you have finished selecting suppliers.
 - c. Return to Order – Order will remain in Draft Status, and you can review Order details before distributing.
1. **Closing Date** – You may be asked to enter in a Closing Date. This is a date you can set for your Order to automatically go on-hold and you will receive no further submissions. Please be aware, if you enter in a closing date, you cannot accept any candidates into post until this date has been met.
 2. **Max Number of Candidates** - How many Candidates you would like in your final shortlist.
 3. **Maximum Supplier Candidates** – How many Candidates per Supplier location can submit.
 4. **Comments** – a free-text box where you can add in any supporting comments.



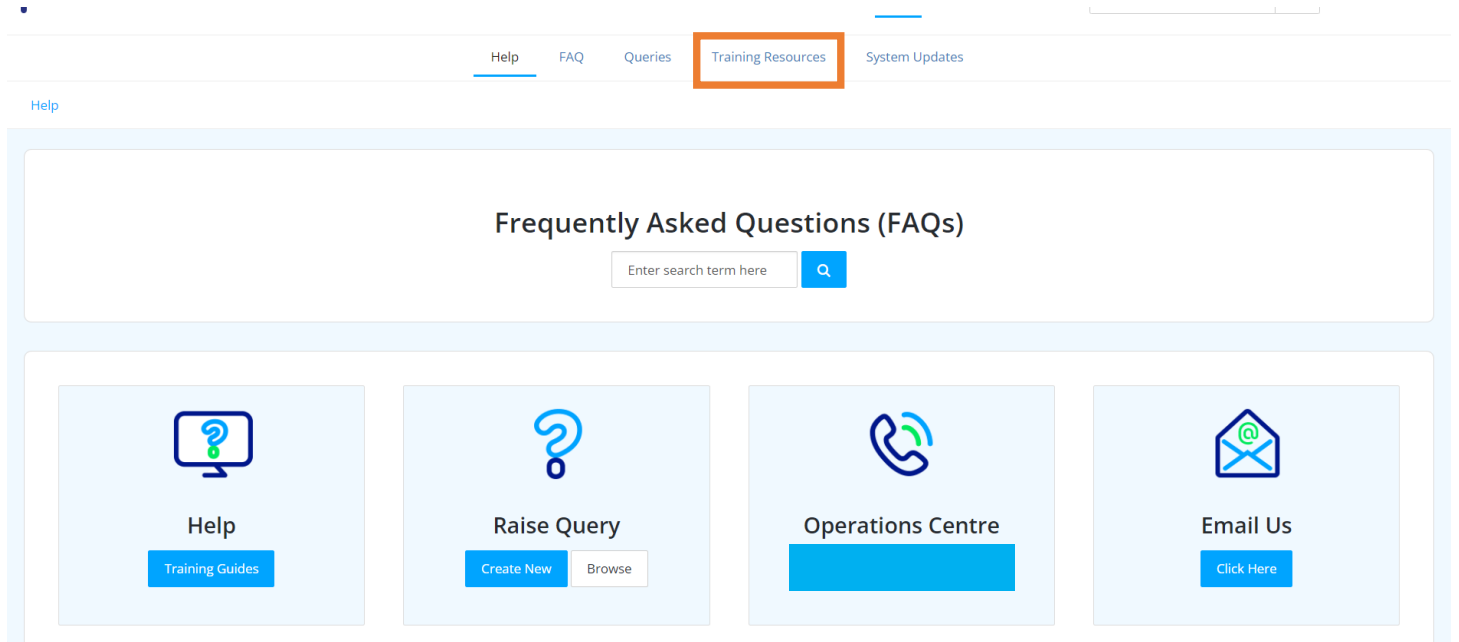
Confirm & Submit

1. When you are happy with the Distribution Options, click  to send your Order for approval (Client Specific) or to send out to the supply chain.
2. If you returned to your Order to review the details before distribution, you will need to click  and select 'Submit' to send the Order to the relevant approver (Client Specific) or Supply Chain.
3. Alternatively, you can click  and 'complete new wizard' to be taken through each step of the Order Creation Wizard again.



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.

