



## Candidate Review

Client Guide  
Vol. 6



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## Order Overview

1. Order Status
2. Order Summary
3. Links
  - a. Interview Report – Report of all interviews and status' against Order
  - b. Download Candidate CVs – Ability to download all Candidate CVs against Order as a Zip Folder.
4. Other Items - Sub Sections within the Order. Click through to see each stated section.

Order - # RQ417349 (Status: Open) 1
▼



Order # : RQ417349  
 Job Title : Admin Assistant  
 Job Category : Sec / Admin  
 Category : Agency Workers  
**Level 1 Name :** **Operational Services**  
 Client : Training Client  
 Client Location : Waste and Recycling Depot, Pendragon Close, Malvern, WR14 1GR  
 Justification : Cover for Permanent Leaver  
 Estimated Client Total : £70,402.50  
 Estimated Supply Total : £68,880.00  
 Status : Open  
**IR35 Status :** **Inside IR35**

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Client Owner : Alex Bill  
 Client Manager : James Nablet  
 Hours Per Week : 35.00  
 Start Date : 24/11/2023  
 End Date : 24/12/2023  
 Start Time : 09:00  
 End Time : 17:30

2

Links

- Printable Detail 3
- Compare Candidates
- Interviews Report
- Download Candidate CVs

Other Items

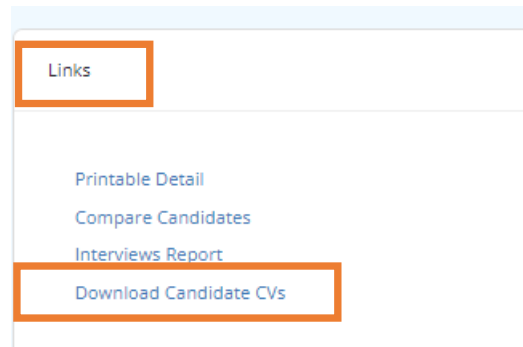
- Activity
- Skills 4
- Cost Codes 0
- Locations 1
- Notes 2
- Notifiers 0
- Candidates 14
- Pre-Employment Documents 0
- Candidate Questions 0
- Qualifications 0
- Questions And Answers 0
- Rates 4



## Reviewing Candidates

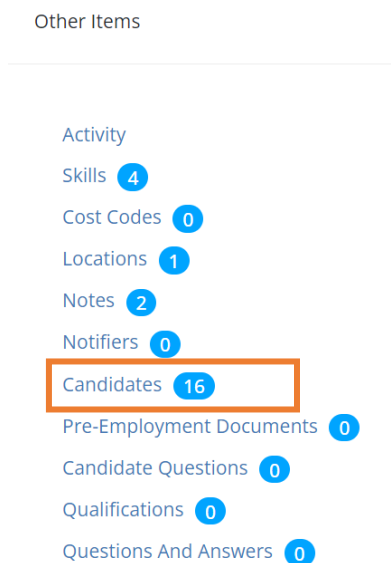
When a Candidate is submitted towards your Order, you will receive an email notification regarding this.

1. Navigate to the order and head over to the Links sub section on the right-hand side. Click on Download candidate CVs.



***Download Candidate CVs – Ability to download all Candidate CVs against Order as a Zip Folder.***




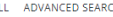




2. Once you have reviewed all the CVs and filtered the candidates that you wish to accept and the ones that you wish to reject you can move on to the next section
3. Navigate to the box below and Click on the 'Candidates' section under the 'Other Items' sub section on the Order Page











4. Click on  icon next to the Candidate OF number to be directed to a Candidate's summary page.

All Orders / Order Detail / Candidates (Filtered on Parent) **14**

Here is a list of all of the Candidates which have been created against your Order. You can view related data about each Candidate by single-clicking on a row and using the subform displayed below the list of Candidates. (Hide)

 SAVE 
  REFRESH 
  SHOW ALL 
  ADVANCED SEARCH 
  FILL DOWN 
  ACTIONS - 
  FILTERS - 
  CUSTOMIZE -

#	Status	Supplier	Worker	Start Date	Contract Type	Weekly Cost	Score	Posit...	Revie...	Pension Enrolled	Reject	Rejection Reason
 <a href="#">OF14...</a>	Rejected	Great Recruiters Ltd - Test	Rogers Brown	11/12/2023	PAYE	£508.50	50.00		<input type="checkbox"/>	Opted Out	<input checked="" type="checkbox"/>	No CV attached
 <a href="#">OF14...</a>	Pending Place...	Great Recruiters Ltd - Test	Sara McGeorge	24/11/2023	PAYE	£508.50	50.00	1	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Pending Place...	Great Recruiters Ltd - Test	South Tau	24/11/2023	PAYE	£508.50	50.00	1	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Pending Place...	Great Recruiters Ltd - Test	Test Ben3	24/11/2023	PAYE	£508.50	50.00	1	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Submitted	Great Recruiters Ltd - Test	Test Candidate	24/11/2023	PAYE	£508.50	50.00	1	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Pending Place...	Great Recruiters Ltd - Test	Hakim Nathan	24/11/2023	PAYE	£508.50	50.00	1	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Pending Place...	Great Recruiters Ltd - Test	Candidate Four	24/11/2023	PAYE	£508.50	15.00	11	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	
 <a href="#">OF14...</a>	Successful	Great Recruiters Ltd - Test	Mary Adams	24/11/2023	PAYE	£508.50	15.00	11	<input type="checkbox"/>	Opted Out	<input type="checkbox"/>	



## Candidate Summary Overview

REFRESH ACTIONS

**Current Status:** 1


This has been **Submitted** for client review.

**Next Steps:**

Use the green 'Actions' button at the top of the page and select:  
**Accept** to create a placement.  
**Reject** to reject the suppliers candidate / offer.  
**Revise Price** to amend the suppliers price.  
**Request Interview** to request an interview on behalf of the client.  
**Withdrawn** to cancel the suppliers submission.

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Candidate - # OF1487571 (Status: Submitted) v



2

Candidate # :	OF1487571
Supplier :	Great Recruiters Ltd - Test
Order # :	RQ417349
Status :	Submitted

**Other Items** 3

- Run Candidate Report
- Report Map
- Activity
- Pre-Employment Documents 7
- Notes 0
- Candidate Questions 0
- Unused Rates 0

1. **Candidate Status**
  - a. Submitted – Available to review
  - b. Rejected – Rejected status
  - c. Withdrawn – No longer available
  - d. Cancelled - No longer available
  - e. Pending Placement – This submission has been accepted and is pending the creation of a Placement
  - f. Successful – Already accepted for role
  
2. **Summary** – Basic summary of Candidate information
  
3. **Other Items** – Quick access to sub sections of Candidate Profile
  - a. Pre-Employment Documents – Here is where you can download all documents for the candidate (i.e. References)





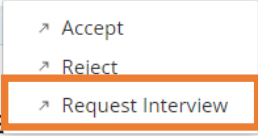
## Requesting Interviews

Interviews with Candidates can be requested via Matrix-CR.net from the Candidate summary page.

1. Click the  button and select 'Request Interview'.


Candidate - # OF1487607 (Status: Submitted)


 REFRESH 



**Current**

This is currently pending your review. Once the Closing Date has passed you may accept or reject submissions. Alternatively you can request interviews at any time.

Candidate - # OF1487607 (Status: Submitted) 



Candidate # : OF1487607  
Supplier : Great Recruiters Ltd - Test  
Order # : RQ417914  
Status : Submitted

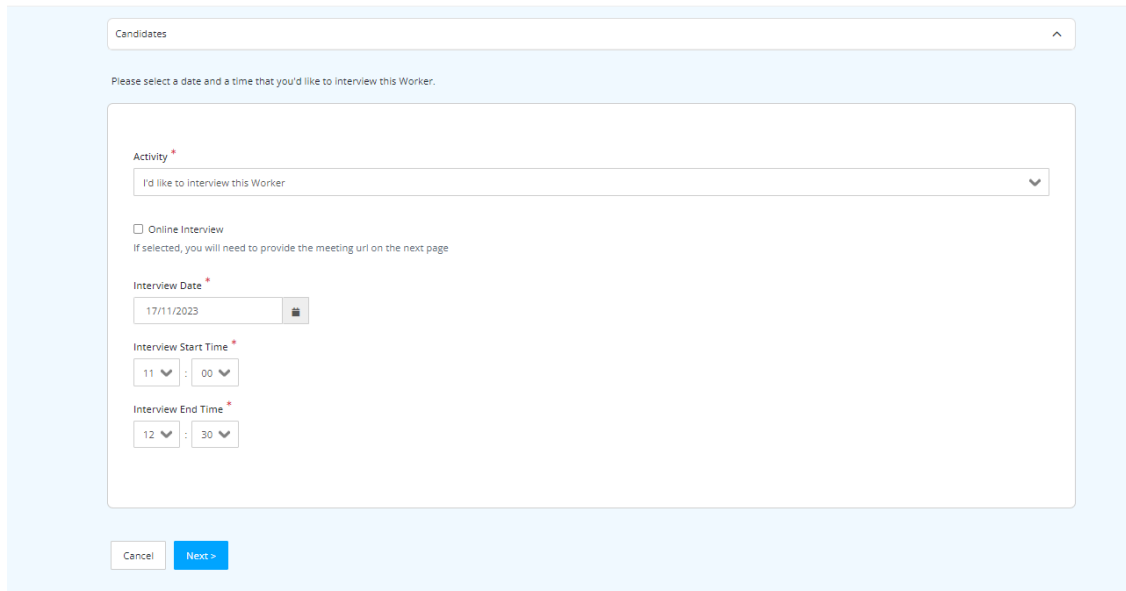
Supplier Contact : Training Consultant  
**Contract Type : PAYE**

You will then be taken to the next page to enter in all the requirements.



2. Submit the date and time that you would like to interview the Candidate click

, and add.



Candidates

Please select a date and a time that you'd like to interview this Worker.

Activity \*

I'd like to interview this Worker

Online Interview  
If selected, you will need to provide the meeting url on the next page

Interview Date \*

17/11/2023

Interview Start Time \*

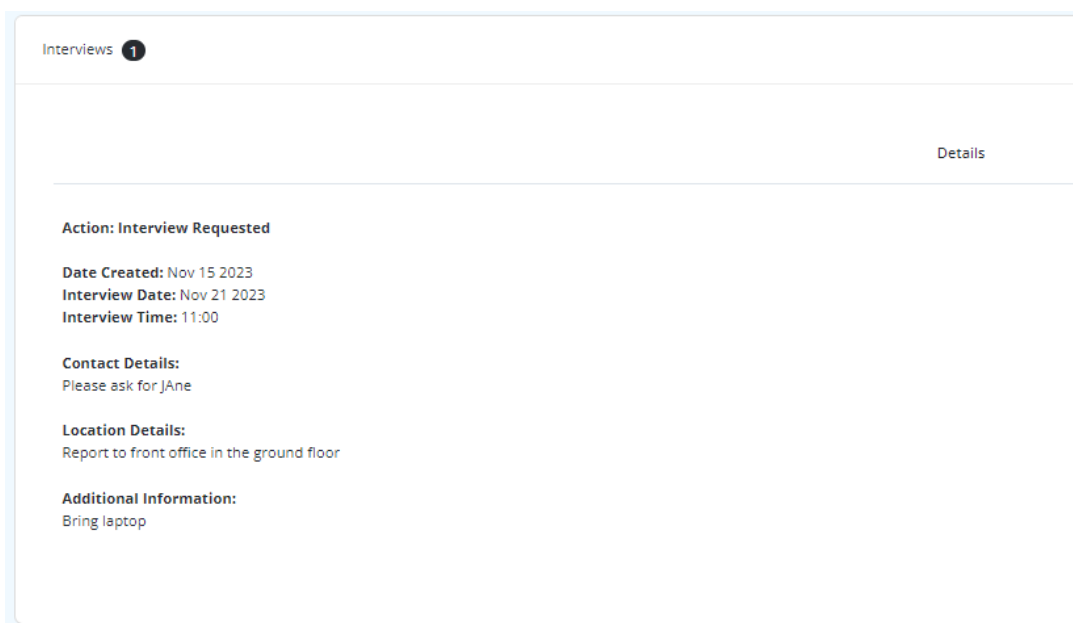
11 : 00

Interview End Time \*

12 : 30

3. Any additional information for the interview on the following page ensuring you click when you have entered in all relevant information

4. Once saved, the interview will show on the Candidate summary page:



Interviews **1**

Details

**Action: Interview Requested**

**Date Created:** Nov 15 2023  
**Interview Date:** Nov 21 2023  
**Interview Time:** 11:00

**Contact Details:**  
Please ask for JAne

**Location Details:**  
Report to front office in the ground floor

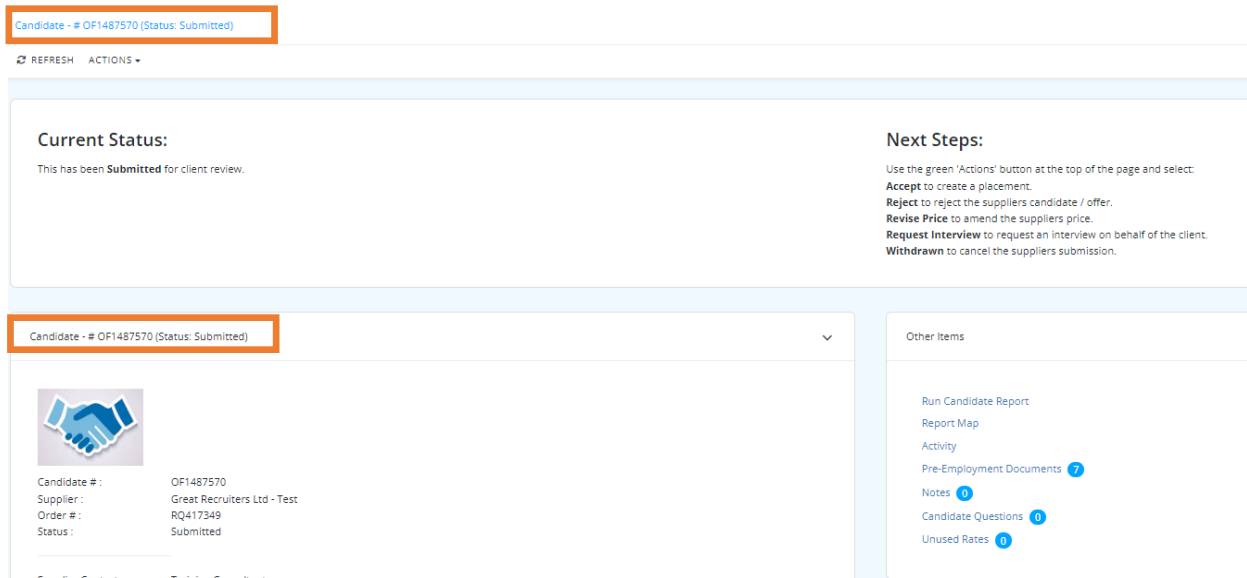
**Additional Information:**  
Bring laptop





## Rejecting a Candidate – Through Candidate Summary Page

1. Navigate to the Candidate summary page.



Candidate - # OF1487570 (Status: Submitted)

REFRESH ACTIONS

**Current Status:**  
This has been **Submitted** for client review.

**Next Steps:**  
Use the green 'Actions' button at the top of the page and select:  
**Accept** to create a placement.  
**Reject** to reject the suppliers candidate / offer.  
**Revise Price** to amend the suppliers price.  
**Request Interview** to request an interview on behalf of the client.  
**Withdrawn** to cancel the suppliers submission.

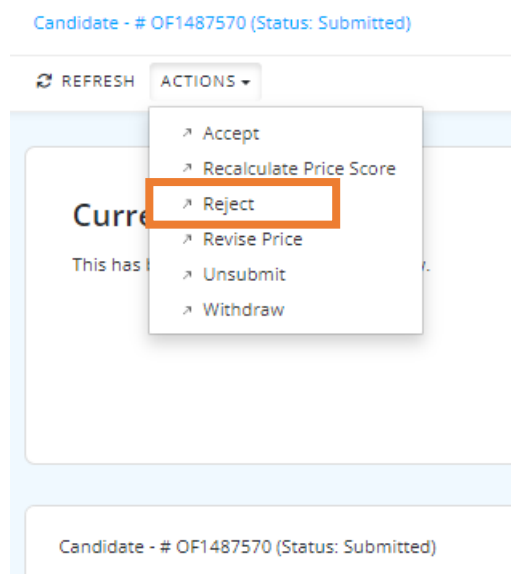
Candidate - # OF1487570 (Status: Submitted)

Other Items

- Run Candidate Report
- Report Map
- Activity
- Pre-Employment Documents 7
- Notes 0
- Candidate Questions 0
- Unused Rates 0

Candidate #: OF1487570  
Supplier: Great Recruiters Ltd - Test  
Order #: RQ417349  
Status: Submitted

2. The candidate can be rejected by clicking on **ACTIONS** and selecting the 'Reject' option on their Candidate summary page.



Candidate - # OF1487570 (Status: Submitted)

REFRESH ACTIONS

- Accept
- Recalculate Price Score
- Reject**
- Revise Price
- Unsubmit
- Withdraw

Candidate - # OF1487570 (Status: Submitted)



3. Select the reason for rejecting the Candidate from the dropdown list and add any supporting comments. Ensure you click **Reject**. Once submitted, the Candidate's status will update to Rejected.

Candidate ^

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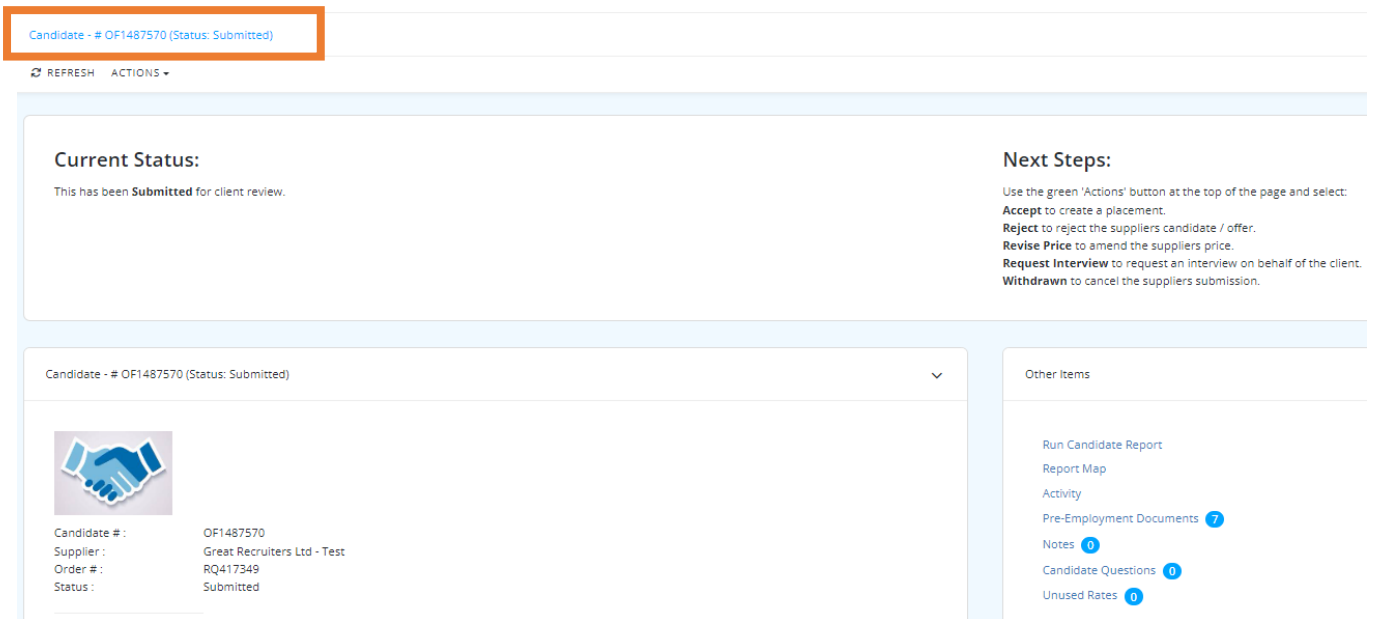
**Reject the suppliers Candidate.**

Reason <sup>\*</sup>

Comments

## Accepting a Candidate – Through Candidate Summary Page

### 1. Navigate to the Candidate Summary Page



Candidate - # OF1487570 (Status: Submitted)

REFRESH ACTIONS

**Current Status:**  
This has been **Submitted** for client review.

**Next Steps:**  
Use the green 'Actions' button at the top of the page and select:  
**Accept** to create a placement.  
**Reject** to reject the suppliers candidate / offer.  
**Revise Price** to amend the suppliers price.  
**Request Interview** to request an interview on behalf of the client.  
**Withdrawn** to cancel the suppliers submission.

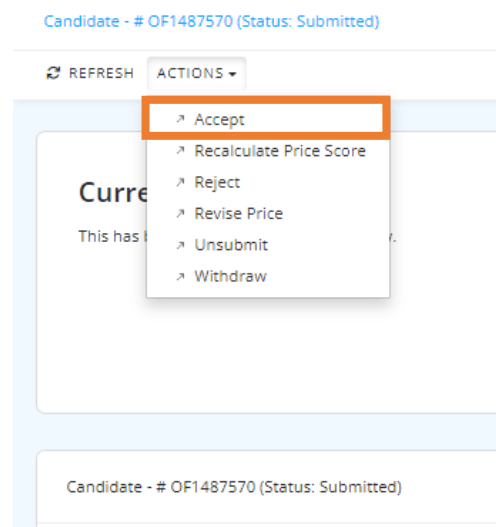
Candidate - # OF1487570 (Status: Submitted)

Other Items

- Run Candidate Report
- Report Map
- Activity
- Pre-Employment Documents **7**
- Notes **0**
- Candidate Questions **0**
- Unused Rates **0**

Candidate #: OF1487570  
Supplier: Great Recruiters Ltd - Test  
Order #: RQ417349  
Status: Submitted

### 2. The candidate can be Accepted by clicking on **ACTIONS** and selecting the 'Accept' option on their Candidate summary page.



Candidate - # OF1487570 (Status: Submitted)

REFRESH ACTIONS

- Accept
- Recalculate Price Score
- Reject
- Revise Price
- Unsubmit
- Withdraw

Candidate - # OF1487570 (Status: Submitted)



3. Ensure that Accept – Progress to New Placement is highlighted and click the green accept button.

Candidate ^

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Accept the suppliers Candidate so a Placement can be created.

Comments

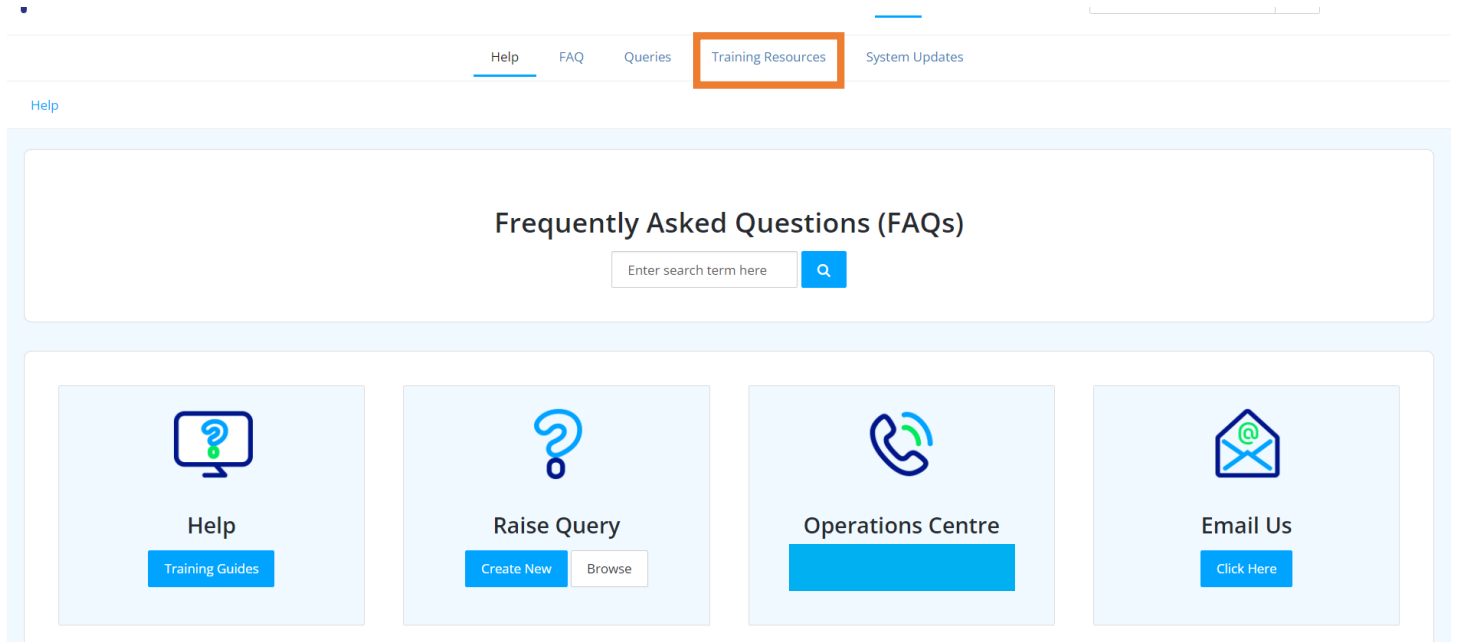
Accept - Progress To New Placement  
 Accept - Return To Candidate

Go Back < Accept



## 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.

