



Cancelling an Order

Client Guide
Vol. 4



Content

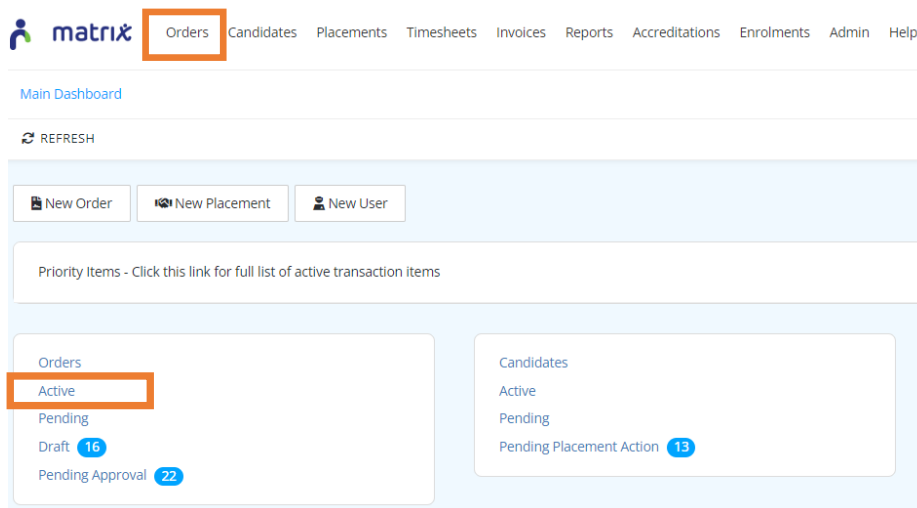
Cancelling an Order.....	3
Need More Support?.....	9



Cancelling an Order





Sometimes you may need to cancel an order, for various reasons. Please follow the steps below to cancel your order.

1. From the Home screen, Click on either the 'Orders navigational tab' or 'Active' from the orders dashboard.



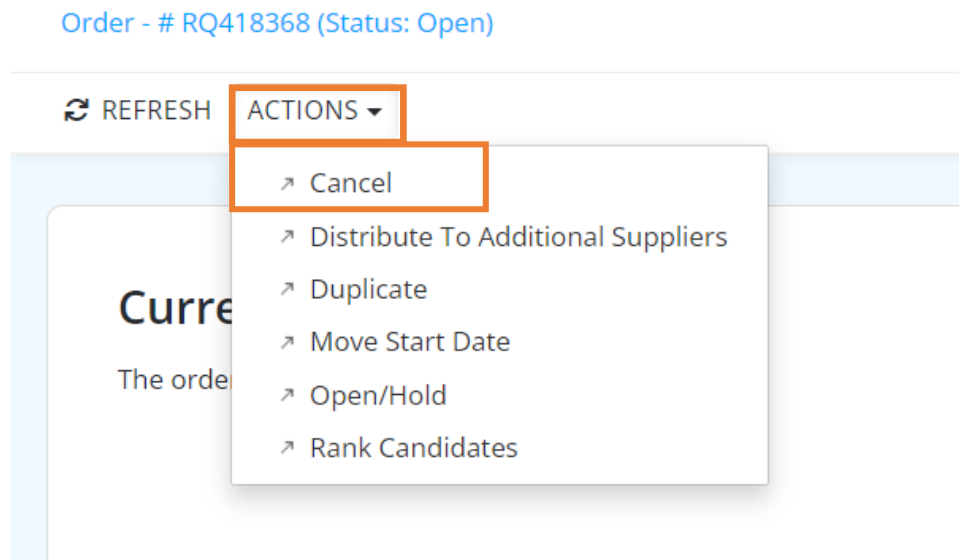
The screenshot shows the Matrix dashboard interface. At the top, the navigation menu includes 'Orders', 'Candidates', 'Placements', 'Timesheets', 'Invoices', 'Reports', 'Accreditations', 'Enrolments', 'Admin', and 'Help'. The 'Orders' tab is highlighted with an orange box. Below the navigation, there is a 'Main Dashboard' section with a 'REFRESH' button and three buttons: 'New Order', 'New Placement', and 'New User'. A 'Priority Items' section contains a link for a full list of active transaction items. The dashboard features two main widgets. The left widget, titled 'Orders', has a sub-section for 'Active' which is highlighted with an orange box. Other sub-sections include 'Pending', 'Draft' (with a count of 16), and 'Pending Approval' (with a count of 22). The right widget, titled 'Candidates', has sub-sections for 'Active', 'Pending', and 'Pending Placement Action' (with a count of 13).


2. Click into the order that you wish to cancel via the 

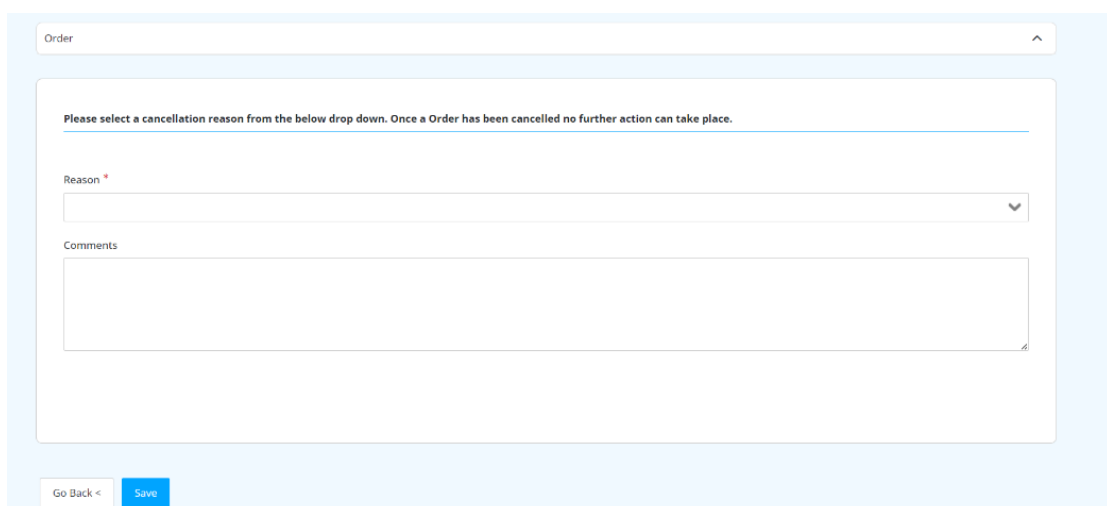
#	Status	Client
 RQ418428	Open	Training Client
 RQ418427	Open	Training Client
 RQ418368	Open	Training Client
 RQ418071	Open	Training Client



3. Select the actions button and select the cancel.



4. Enter in the reason for cancelling the order and any additional comments, if necessary, then click the  button.



Order

Please select a cancellation reason from the below drop down. Once a Order has been cancelled no further action can take place.


Reason *

Comments

Go Back < Save

5. You will see the status change to Cancelled.

Order - # RQ418368 (Status: Cancelled)

 REFRESH ACTIONS ▾

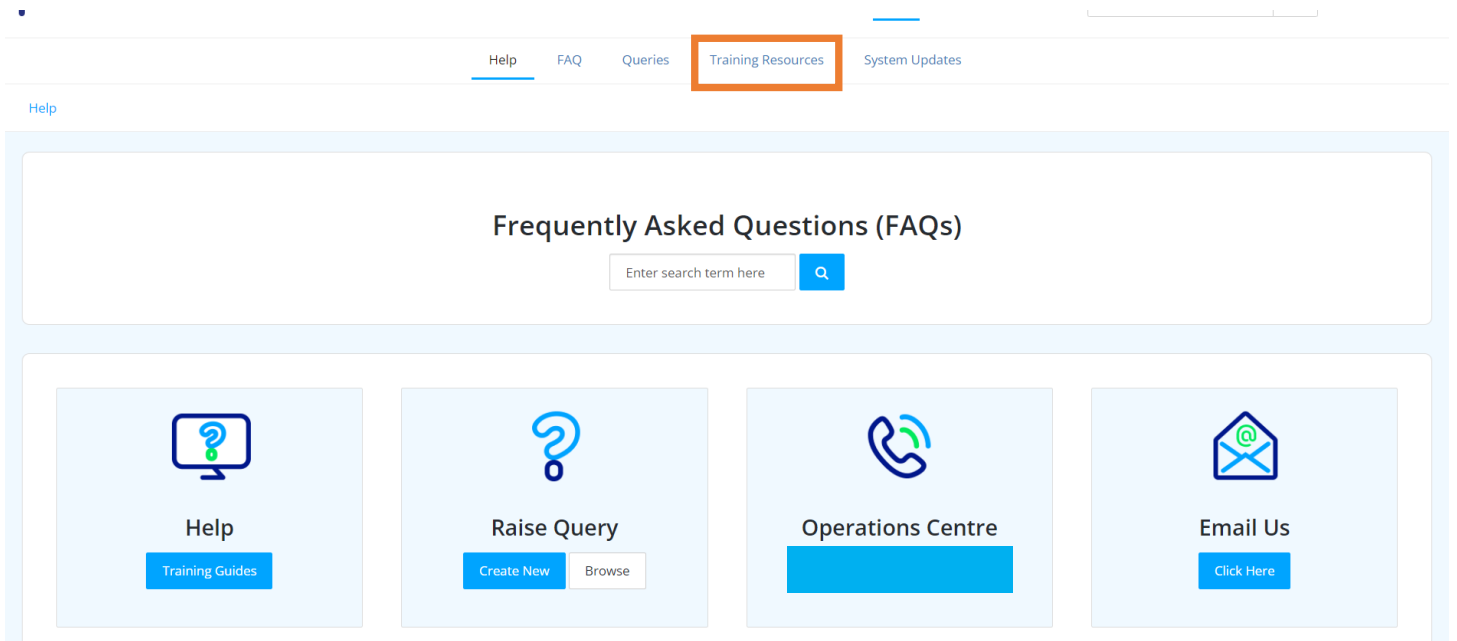
Current Status:

This order has been **Cancelled** (To view the reason why please use the 'Activity' link in the 'Other Items' section).



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 'Frequently Asked Questions (FAQs)' section with a search bar containing the text 'Enter search term here' and a magnifying glass icon. Below the search bar are four service tiles: 'Help' with a 'Training Guides' button, 'Raise Query' with 'Create New' and 'Browse' buttons, 'Operations Centre' with a blue button, and 'Email Us' with a 'Click Here' button.

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.

