Creating a New Order & Distribution of the Order

Client Guide

Vol. 2

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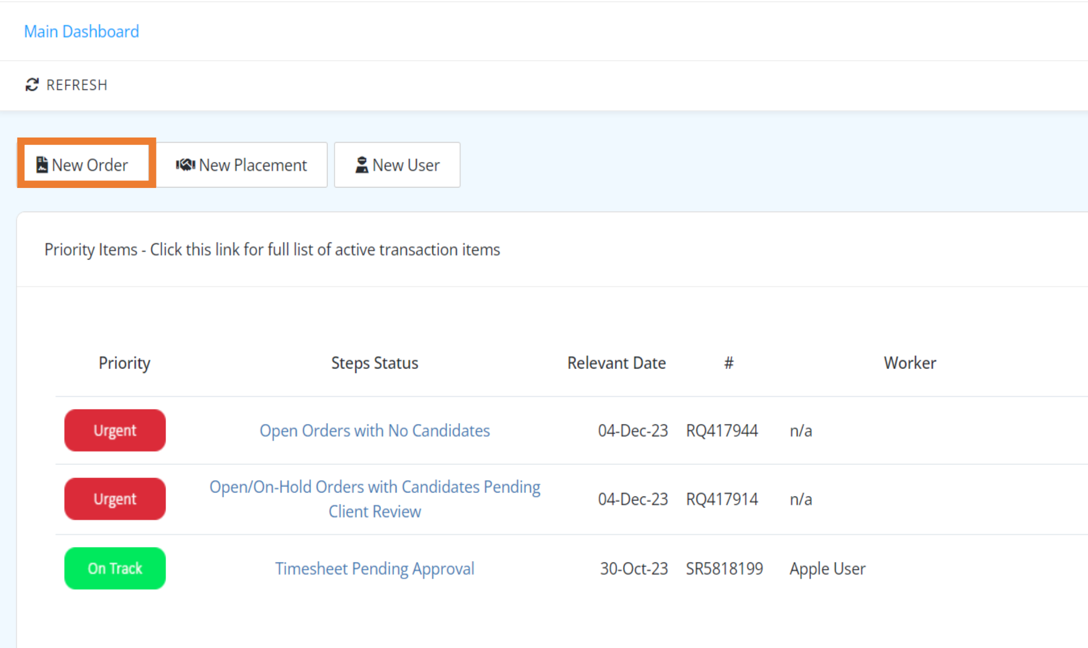
Connecting People to Work

Content

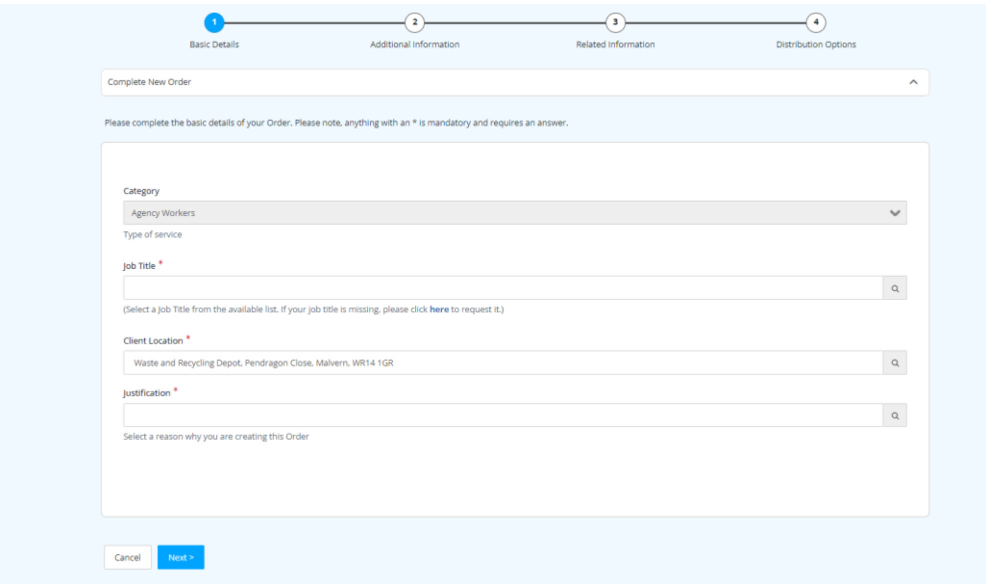
Creating a New Order

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



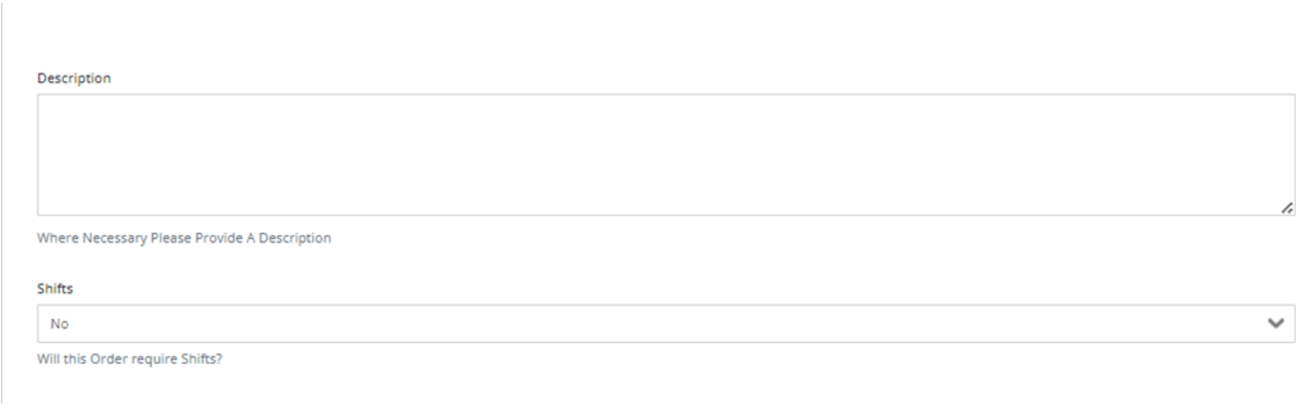
2. Fill out the Basic Order details. Search for the Job Title, Location and Justification via the  Icon. Once completed, click 

to continue and save your Draft Order.

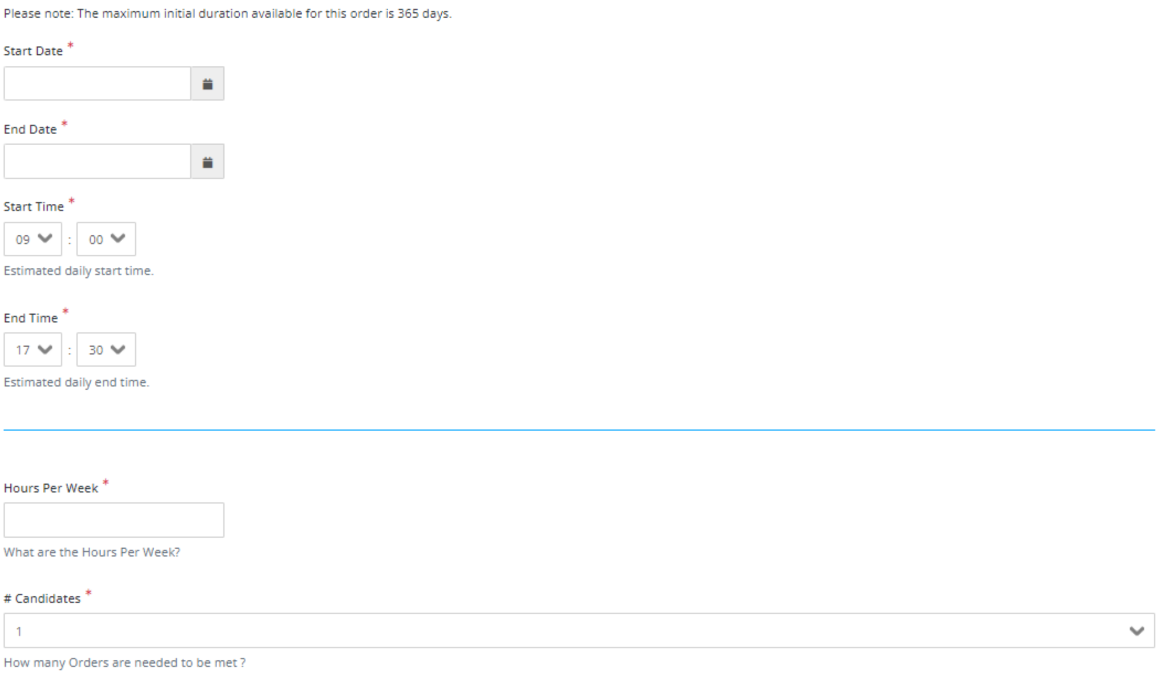


3. On the next Additional Information Page, fill in all required Order details. Ensure to add further information for agencies in the free text description box. This can be why it would be good to work for your company, if the role is Hybrid working, what the shift pattern will be etc.

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



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



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.

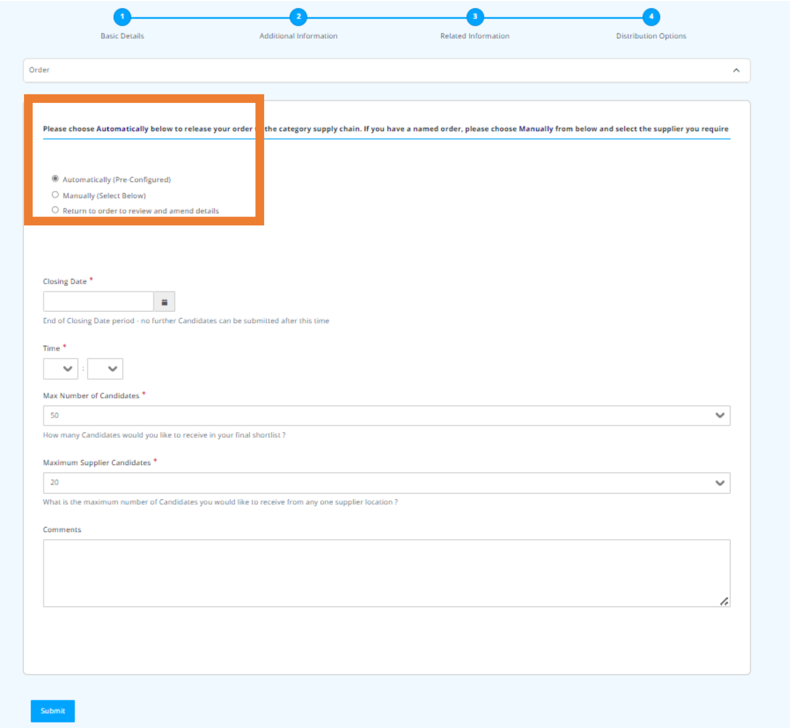
- To action the above click Find more items... Once clicked a separate pop up will appear where you can search, select via the tick boxes, and click Add. Ensure you click Done when you have finished adding the required skills. You can remove these by clicking .

Screening Questions – these are free-type questions you can ask for responses to when Candidates are submitted. To add a new question, click New... 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 Save 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 New... 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 Save when you have finished uploading the document.

When you are happy with the Candidate Criteria, click Next > 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 Done when you have finished selecting suppliers.

c. **Return to Order** – Order will remain in Draft Status, and you can review Order details before distributing.

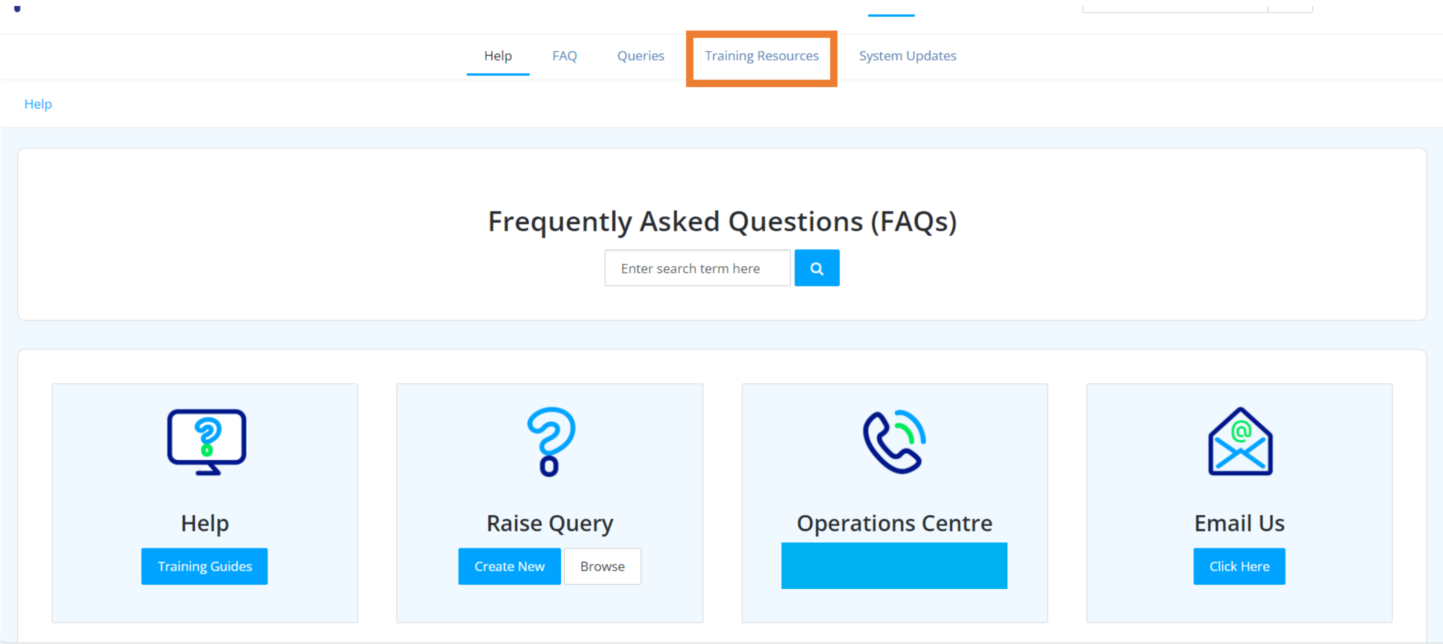
1. **Closing Date** – You may be asked to enter in a Closing Date. This is a date you can set for your Order to automatically go on-hold and you will receive no further submissions. Please be aware, if you enter in a closing date, you cannot accept any candidates into post until this date has been met.
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 Submit 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 ACTIONS ▾ and select 'Submit' to send the Order to the relevant approver (Client Specific) or Supply Chain.
3. Alternatively, you can click ACTIONS ▾ 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:



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.