



Duplicating an Order

Client Guide
Vol. 3




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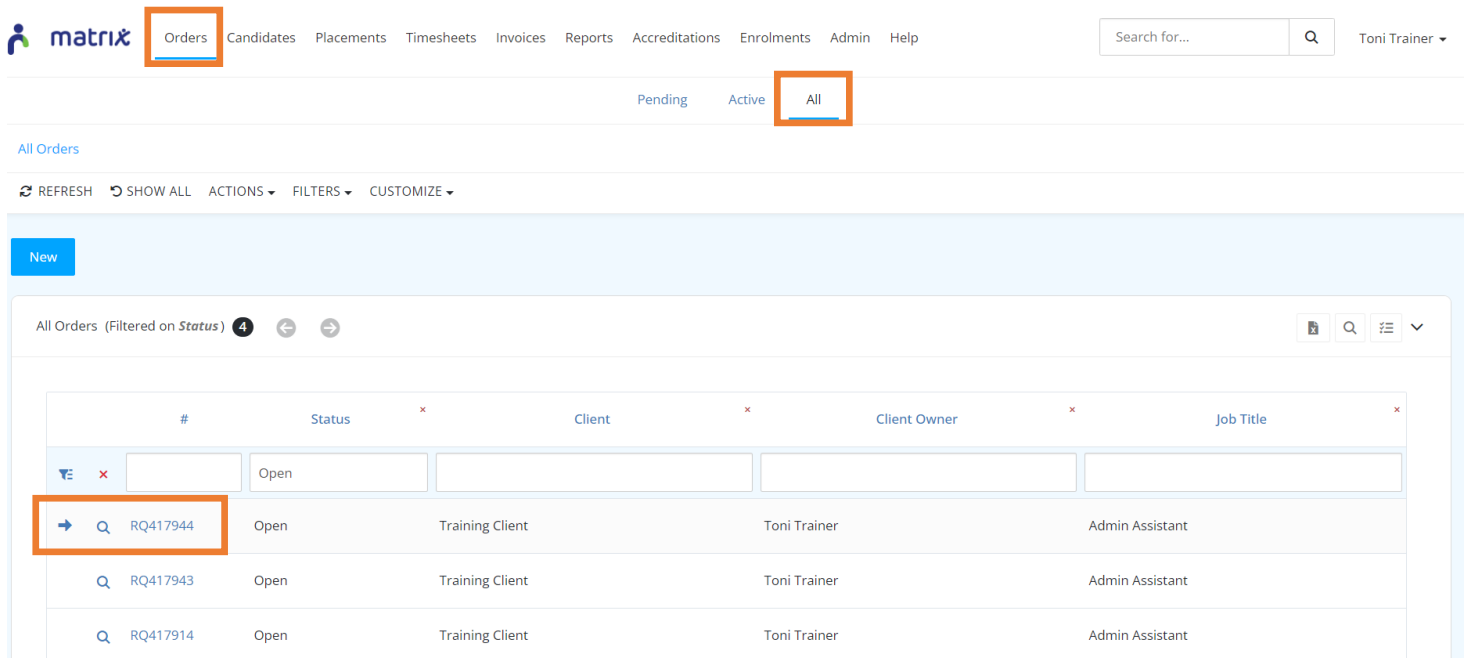
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Duplicating an Order

Any order on Matrix-CR.net can be duplicated from any status.

1. Open your Orders Navigational tab and select 'All' on the sub section (highlighted below). Locate the Order you wish to duplicate and open it via the  icon to the left of the RQ number.



matrix **Orders** Candidates Placements Timesheets Invoices Reports Accreditations Enrolments Admin Help

Search for... Toni Trainer




Pending Active **All**

All Orders

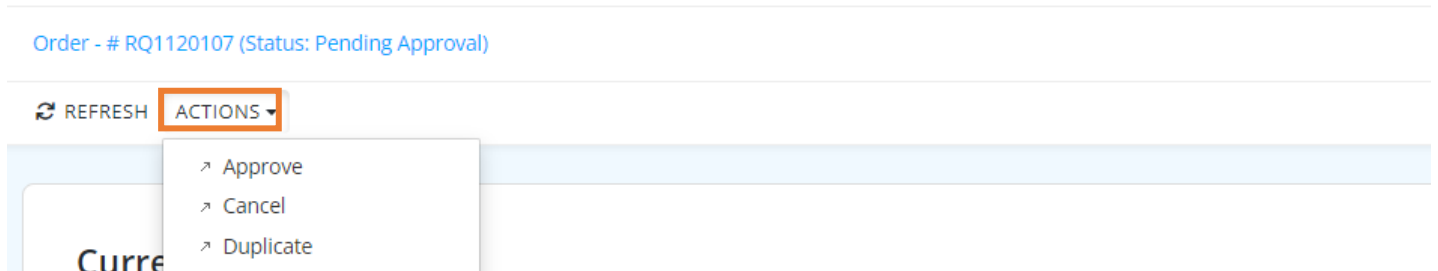
REFRESH SHOW ALL ACTIONS FILTERS CUSTOMIZE

New

All Orders (Filtered on Status) 4

#	Status	Client	Client Owner	Job Title
 RQ417944	Open	Training Client	Toni Trainer	Admin Assistant
 RQ417943	Open	Training Client	Toni Trainer	Admin Assistant
 RQ417914	Open	Training Client	Toni Trainer	Admin Assistant

2. Once on the Order you wish to duplicate, click the **ACTIONS** button and select 'Duplicate'.



Order - # RQ1120107 (Status: Pending Approval)

REFRESH **ACTIONS**

- Approve
- Cancel
- Duplicate

Curre



3. Tick the sections you wish you duplicate to the new Order and click



Order

Select which parts of the Order you wish to duplicate to a new draft Order.

- Order Detail
This is required for the duplication process
- Questions And Answers
- Rates
- Cost Codes
- Documents
- Profile

4. This will put your Order in Draft Status

Order - # RQ1120161 (Status: Draft)

REFRESH ACTIONS

Current Status:
This order is in **Draft**.

Next Steps:
Use the green 'Actions' button at the top of the page and select:
Cancel if the order is no longer required.
Complete New Wizard to follow the step by step order process.
Duplicate to copy details of this order and create a new one.
Submit to send the completed order for the internal approval (where applicable) or to distribute to the select suppliers.

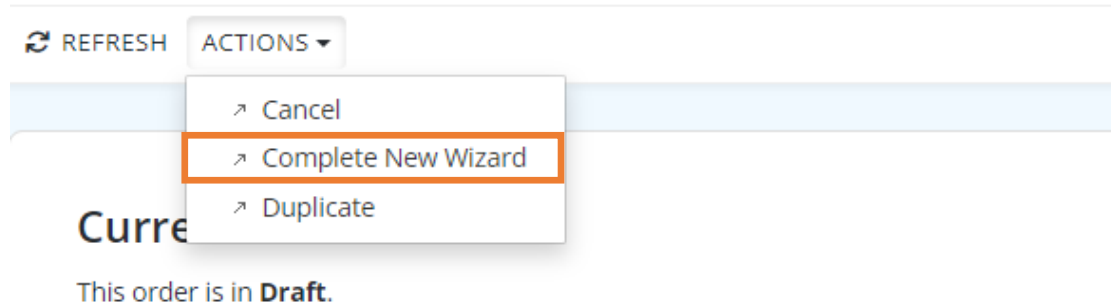
Draft Progress 4

Action	Status	
Does the Order contain cost codes?	Incomplete	✘
Have all of the required fields been filled in?	Completed	✔
Have all of the required documents been successfully uploaded?	Completed	✔



5. Click the **ACTIONS** button and select 'Complete New Wizard' to be taken through each step of the Order Creation Wizard as if creating a new Order.

Order - # RQ1120161 (Status: Draft)

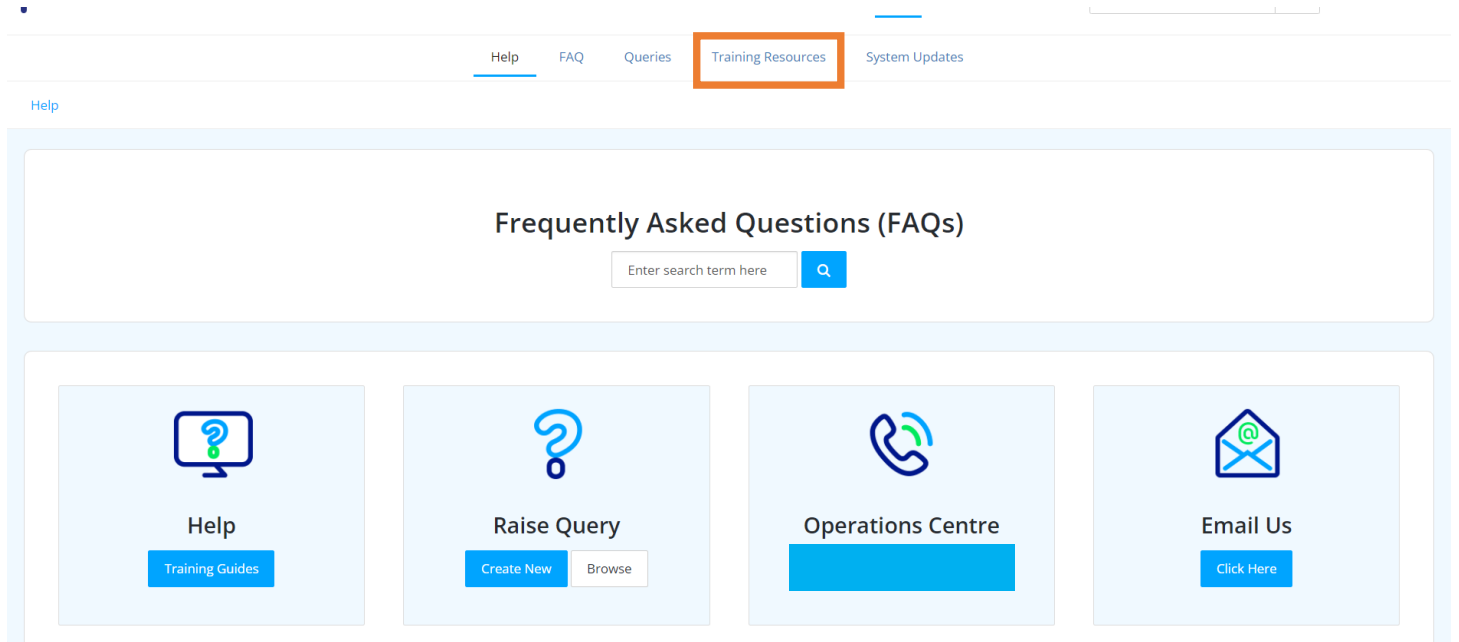


The screenshot shows a user interface for an order. At the top, there is a header "Order - # RQ1120161 (Status: Draft)". Below this, there is a toolbar with a "REFRESH" button and an "ACTIONS" dropdown menu. The "ACTIONS" menu is open, showing three options: "Cancel", "Complete New Wizard", and "Duplicate". The "Complete New Wizard" option is highlighted with an orange border. Below the toolbar, the text "Current" is partially visible, and below that, it says "This order is in **Draft**."

6. Once all sections under Draft Progress are marked as 'Completed' you will be able to click the **ACTIONS** button and select 'Submit' to send the Order to the relevant approver (Client Specific) or distribute to the supply chain.

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.

