



*Supplier*

Process and System Guidance



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# Overview

Matrix Milestone is a dedicated, fully compliant, and reliable route to market for the Public Sector to buy and manage Statement of Works.

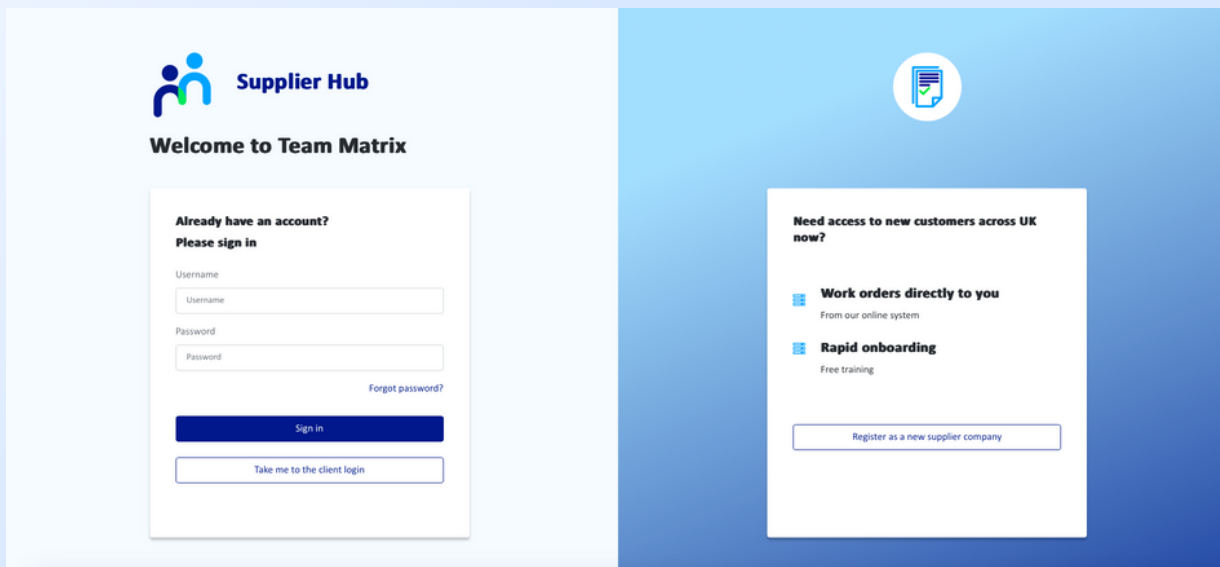
This guide will help you to understand the processes and how to manage the actions required to submit a contractor to a Statement of Work, all the way through to reaching milestones and completing projects.



# Getting Started

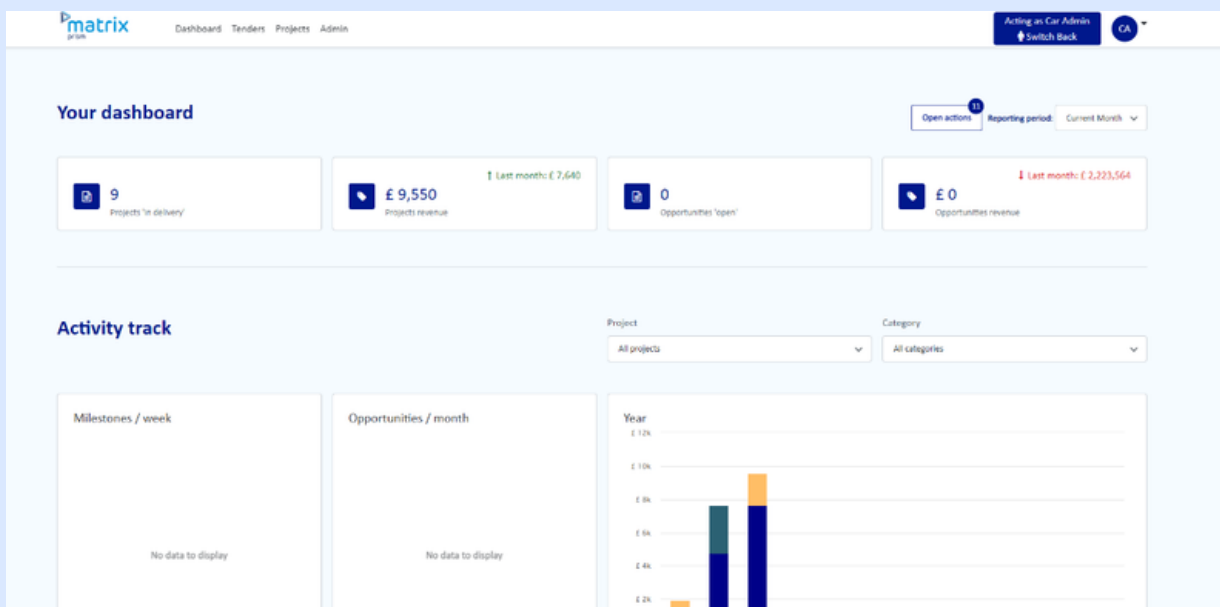
Visit the [registration page](#).

If you have an account, log in with your username and password.  
If you have forgotten your password, select 'forgot password'.



If you don't have an account, [get in touch](#) with our friendly team who will set you up. Alternatively, you can fill out the form under 'register as a new supplier company'.

Once logged in, you'll be directed to the Dashboard tab. This will show you a summary of all activities on the Matrix Milestone platform.



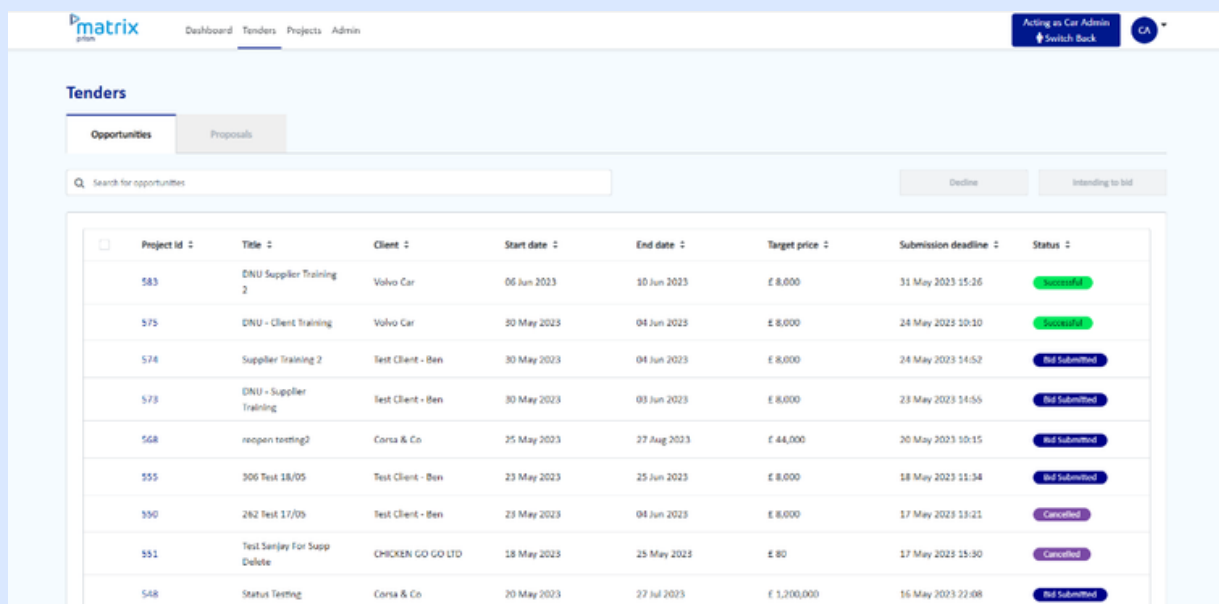
# Opportunities and Proposals

Once logged in, you'll be able to see if there are any opportunities available to submit towards. These can be viewed under the 'Tenders' tab.

Please note that suppliers will need to be invited to a project to submit a proposal unless there is an open tender that falls under the category you have selected.

Under Tenders, you'll find a list of projects split into opportunities and proposals:

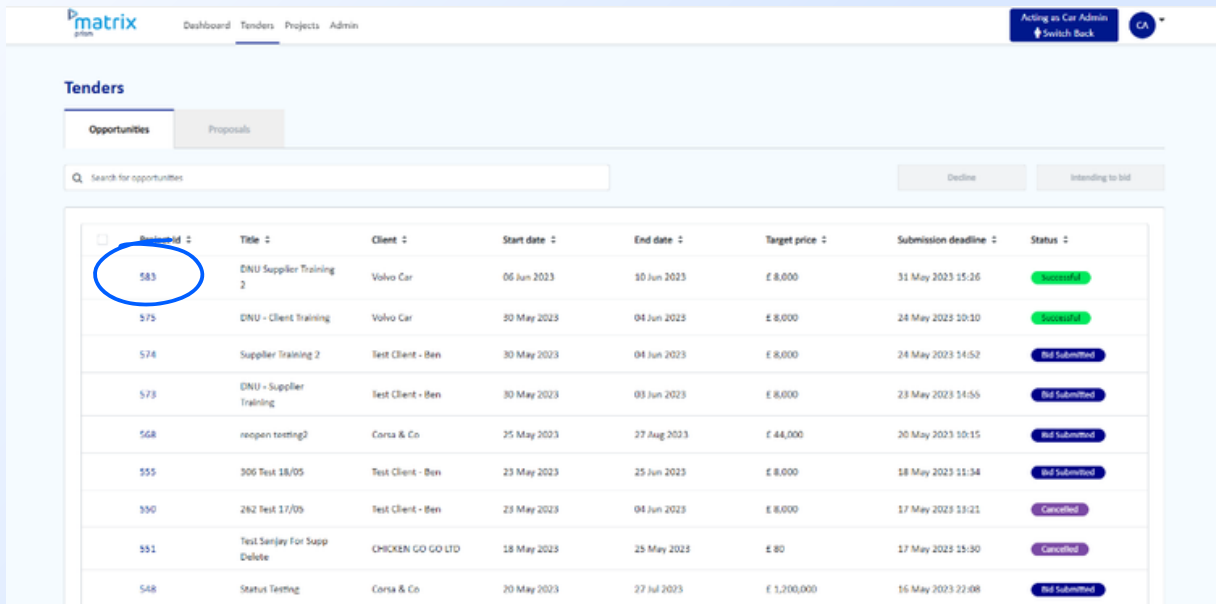
- Opportunities are projects against which proposals can be submitted
- Proposals are projects for which you have already submitted or registered an interest



The screenshot shows the 'matrix' portal interface. At the top, there's a navigation bar with 'Dashboard', 'Tenders', 'Projects', and 'Admin'. The 'Tenders' tab is active. Below the navigation bar, there's a search bar labeled 'Search for opportunities' and two buttons: 'Decline' and 'Intending to bid'. The main content area is titled 'Tenders' and has two sub-tabs: 'Opportunities' (selected) and 'Proposals'. Below these tabs is a table listing various opportunities. The table has columns for Project id, Title, Client, Start date, End date, Target price, Submission deadline, and Status. The status column uses color-coded labels: 'Successful' (green), 'Bid Submitted' (blue), and 'Cancelled' (purple).

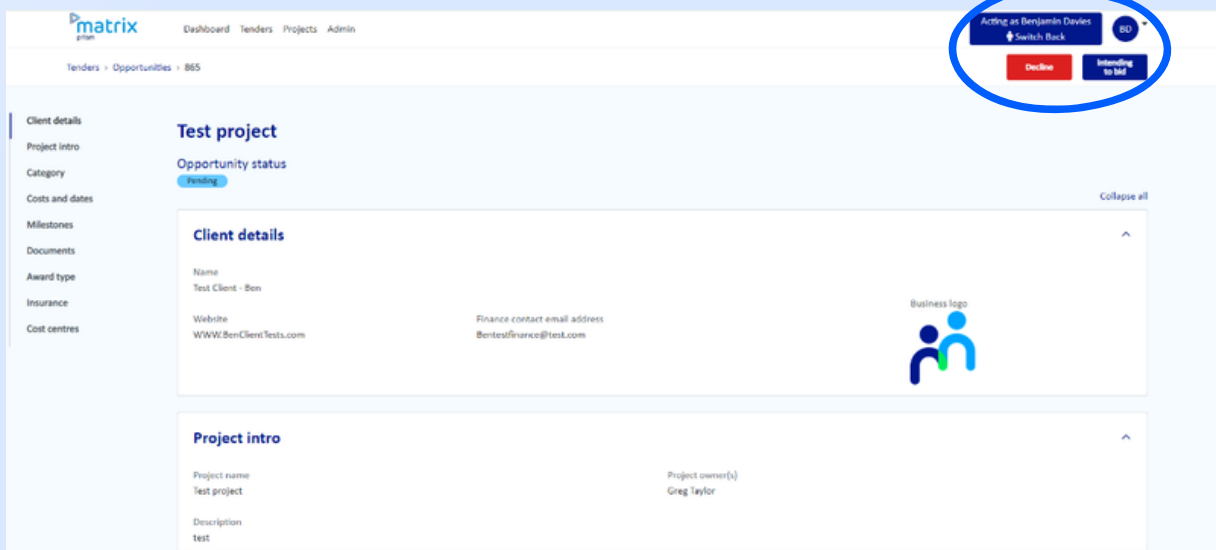
| Project id | Title                       | Client            | Start date  | End date    | Target price | Submission deadline | Status        |
|------------|-----------------------------|-------------------|-------------|-------------|--------------|---------------------|---------------|
| 583        | DNU Supplier Training 2     | Volvo Car         | 06 Jun 2023 | 10 Jun 2023 | £ 8,000      | 31 May 2023 15:26   | Successful    |
| 575        | DNU - Client Training       | Volvo Car         | 30 May 2023 | 04 Jun 2023 | £ 8,000      | 24 May 2023 10:10   | Successful    |
| 576        | Supplier Training 2         | Test Client - Ben | 30 May 2023 | 04 Jun 2023 | £ 8,000      | 24 May 2023 14:52   | Bid Submitted |
| 573        | DNU - Supplier Training     | Test Client - Ben | 30 May 2023 | 03 Jun 2023 | £ 8,000      | 23 May 2023 14:55   | Bid Submitted |
| 568        | reopen testing2             | Corsa & Co        | 25 May 2023 | 27 Aug 2023 | £ 44,000     | 20 May 2023 10:15   | Bid Submitted |
| 555        | 306 Test 18/05              | Test Client - Ben | 23 May 2023 | 25 Jun 2023 | £ 8,000      | 18 May 2023 11:34   | Bid Submitted |
| 550        | 262 Test 17/05              | Test Client - Ben | 23 May 2023 | 04 Jun 2023 | £ 8,000      | 17 May 2023 13:21   | Cancelled     |
| 551        | Test Senjay For Supp Delete | CHICKEN GO GO LTD | 18 May 2023 | 25 May 2023 | £ 80         | 17 May 2023 15:30   | Cancelled     |
| 548        | Status Testing              | Corsa & Co        | 20 May 2023 | 27 Jul 2023 | £ 1,200,000  | 16 May 2023 22:08   | Bid Submitted |

If a project has not been actioned, the status will show as 'pending'.  
To submit a proposal, click the Project ID number.



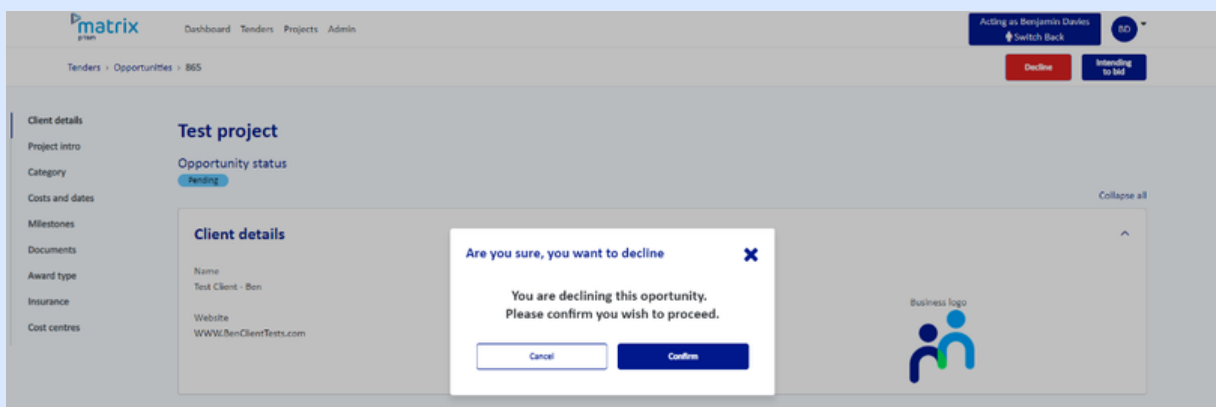
| Business ID | Title                       | Client            | Start date  | End date    | Target price | Submission deadline | Status        |
|-------------|-----------------------------|-------------------|-------------|-------------|--------------|---------------------|---------------|
| 583         | DNU Supplier Training 2     | Volvo Car         | 06 Jun 2023 | 10 Jun 2023 | £ 8,000      | 31 May 2023 15:26   | Successful    |
| 575         | DNU - Client Training       | Volvo Car         | 30 May 2023 | 04 Jun 2023 | £ 8,000      | 28 May 2023 10:10   | Successful    |
| 574         | Supplier Training 2         | Test Client - Ben | 30 May 2023 | 04 Jun 2023 | £ 8,000      | 24 May 2023 14:52   | Bid Submitted |
| 573         | DNU - Supplier Training     | Test Client - Ben | 30 May 2023 | 03 Jun 2023 | £ 8,000      | 23 May 2023 14:56   | Bid Submitted |
| 568         | reopen testing2             | Corsa & Co        | 25 May 2023 | 27 Aug 2023 | £ 44,000     | 20 May 2023 10:15   | Bid Submitted |
| 555         | 306 Test 18/05              | Test Client - Ben | 23 May 2023 | 25 Jun 2023 | £ 8,000      | 18 May 2023 11:34   | Bid Submitted |
| 550         | 262 Test 17/05              | Test Client - Ben | 23 May 2023 | 04 Jun 2023 | £ 8,000      | 17 May 2023 13:21   | Cancelled     |
| 551         | Test Sanjay For Supp Delete | CHICKEN GO GO LTD | 18 May 2023 | 25 May 2023 | £ 80         | 17 May 2023 15:30   | Cancelled     |
| 548         | Status Testing              | Corsa & Co        | 20 May 2023 | 27 Jul 2023 | £ 1,200,000  | 16 May 2023 22:08   | Bid Submitted |

Once in the project, you can either decline the opportunity or select 'intending to bid'.



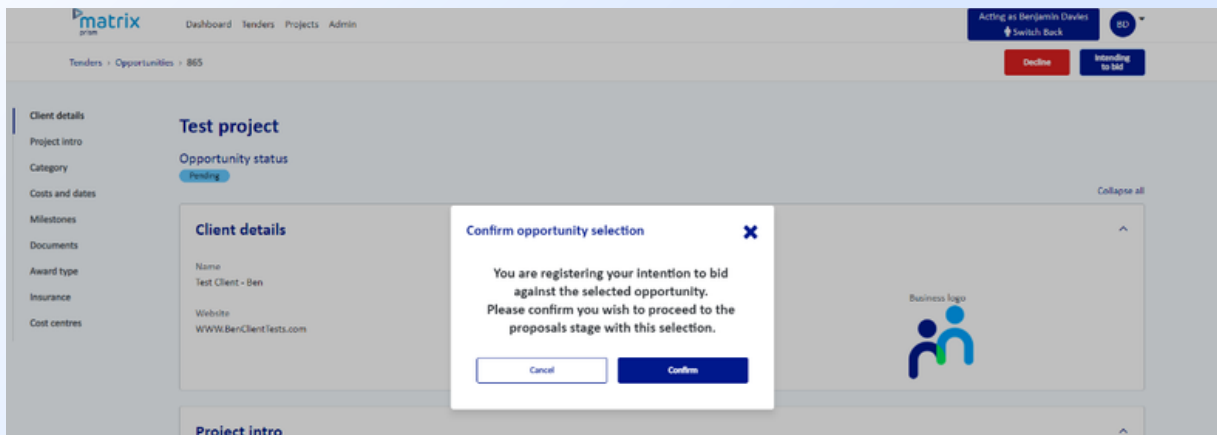
The screenshot shows the 'Test project' page with the opportunity status 'Pending'. In the top right corner, there are two buttons: 'Decline' (red) and 'Intending to bid' (blue). These buttons are circled in blue. The page also displays client details for 'Test Client - Ben' and project intro information.

Should you wish to decline the opportunity, you will be directed to confirm that you are not intending to bid for the project.



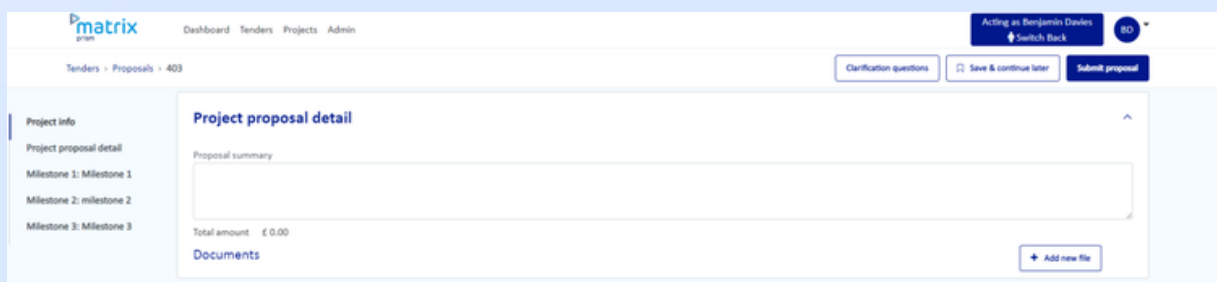
The screenshot shows the 'Test project' page with a confirmation dialog box open. The dialog box has the title 'Are you sure, you want to decline' and the message 'You are declining this opportunity. Please confirm you wish to proceed.' There are two buttons: 'Cancel' and 'Confirm'. The 'Decline' and 'Intending to bid' buttons from the previous screenshot are still visible in the top right corner.

Should you wish to respond, select 'intending to bid', select 'confirm' and then select 'create your proposal'.

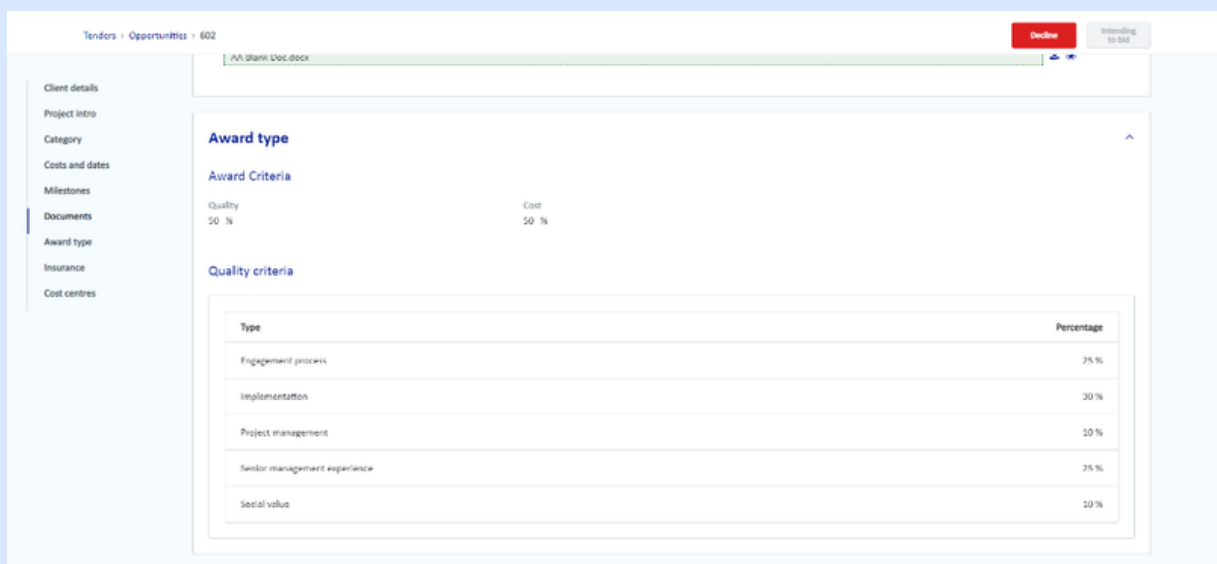


The proposal page will have the status and the detail of the project.

You will need to input details of your proposal. Suppliers will also have the opportunity to add attachments to support their proposal which may include details of practices and the payment of milestones,



Your proposal will need to have specific reference to the Quality Criteria – clients evaluate proposals based on this detail. The Quality Criteria outlines the importance of certain skills in the project.



After the key proposal details and attachments have been completed, you'll need to allocate an amount of the budget to each of the Milestones. You can add supporting notes and attachments to each Milestone if necessary.

It's important to take note of how the management fee will be added to the project. Within some projects, the supplier will absorb the fee whilst in other projects, no reductions will be made. You can see how the management fee will be added when submitting your pricing. You'll see one of two notifications:

Please note that successful supplier proposals will be subject to a management fee of 4.5%. This will be deducted from each milestone payment at the point of invoicing.

Please note that for this project no deductions are applied to the Supplier Proposal

Once all sections have been completed, you can either save the proposal and review later or submit the proposal for client review.

The screenshot shows the 'Milestone 3: Milestone 3' form in the Matrix portal. A confirmation dialog is displayed in the center, asking 'Are you sure you want to submit?'. The dialog includes the text 'By submitting, your proposal will be put forward for evaluation.' and two buttons: 'Back to form' and 'Confirm & submit'. The background form shows fields for 'Name: Milestone 3', 'Amount (£)' set to '2,000', and a 'Notes' section.

Once submitted, the proposal will be reviewed by the client after the deadline. You can track progress of your proposals in the 'Proposals' tab. The status will change dependant on the stage of the tender.

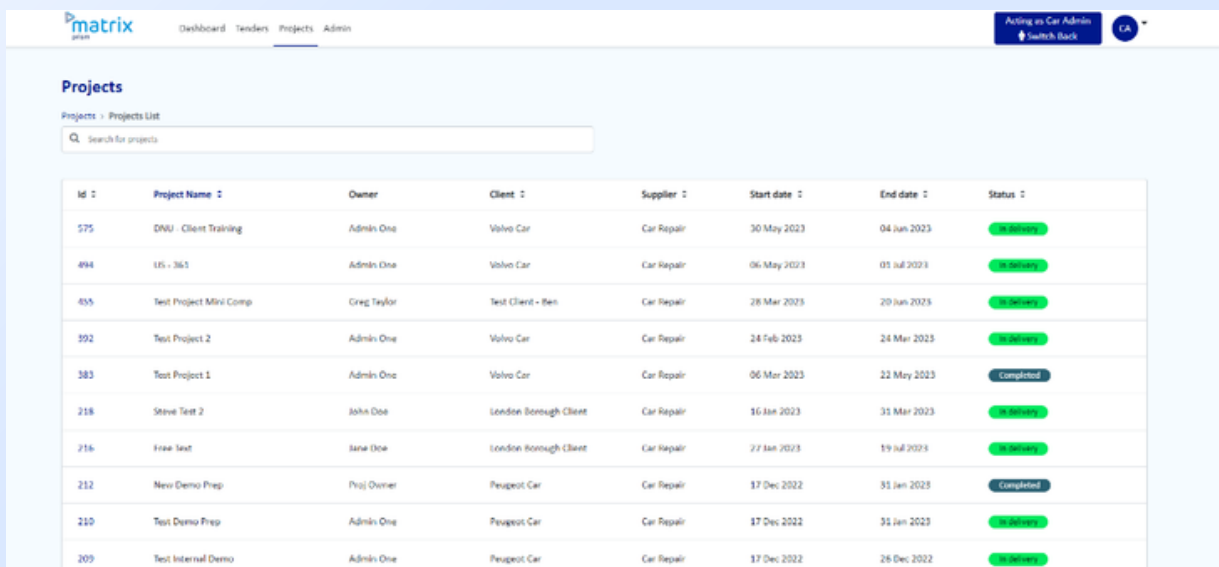
The screenshot shows the 'Tenders' tab in the Matrix portal, specifically the 'Proposals' sub-tab. It displays a table with the following columns: Project id, Title, Client, Start date, End date, Target price, Submission deadline, and Status. The table contains six rows of data.

| Project id | Title                 | Client            | Start date  | End date    | Target price | Submission deadline | Status     |
|------------|-----------------------|-------------------|-------------|-------------|--------------|---------------------|------------|
| 586        | Test project          | Test Client - Ben | 12 Jun 2023 | 19 Jun 2023 | £ 8,000      | 07 Jun 2023 12:20   | Submitted  |
| 585        | Build a House         | Test Client - Ben | 06 Jun 2023 | 24 Jun 2023 | £ 20,000     | 02 Jun 2023 15:32   | Submitted  |
| 576        | Training Session 1    | Volvo Car         | 30 May 2023 | 09 Jun 2023 | £ 7,000      | 25 May 2023 14:42   | Successful |
| 569        | Milestone status test | Corse & Co        | 24 May 2023 | 22 Jul 2023 | £ 80,000     | 20 May 2023 10:19   | Successful |
| 568        | reopen testing2       | Corse & Co        | 25 May 2023 | 27 Aug 2023 | £ 44,000     | 20 May 2023 10:15   | Submitted  |
| 555        | 306 Test 18/05        | Test Client - Ben | 23 May 2023 | 25 Jun 2023 | £ 8,000      | 18 May 2023 11:34   | Draft      |

# Current Projects and Milestones

Current projects can be viewed under the 'Projects' tab.

You'll see the basic information of each project, including title, start and end date, and the client.

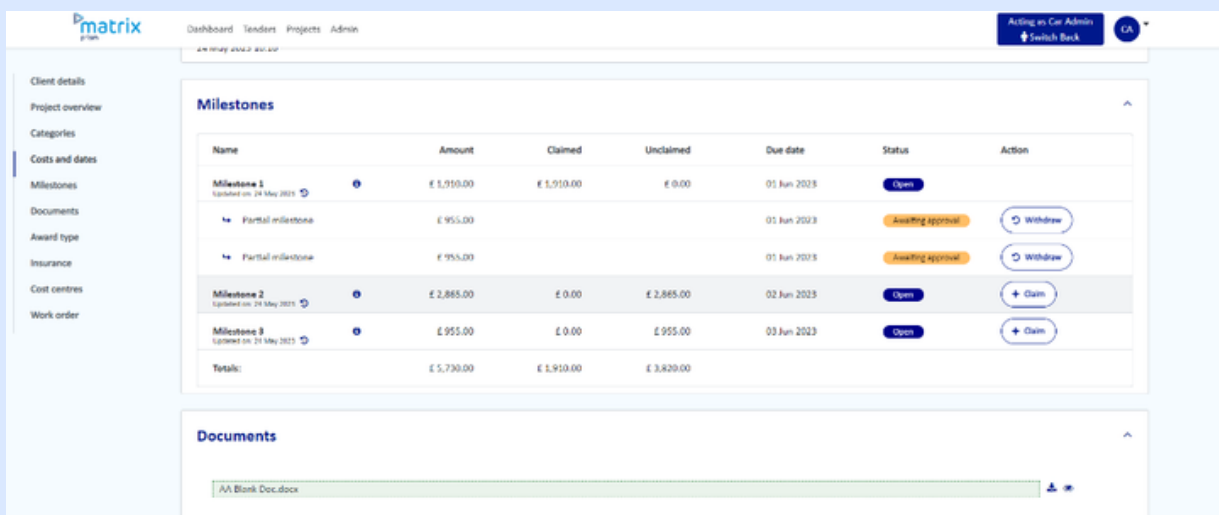


The screenshot shows the 'matrix' web application interface. At the top, there's a navigation bar with 'Dashboard', 'Tenders', 'Projects', and 'Admin'. The 'Projects' tab is active. Below the navigation bar, there's a 'Projects' section with a 'Projects List' and a search bar. The main content is a table listing various projects with columns for ID, Project Name, Owner, Client, Supplier, Start date, End date, and Status.

| ID  | Project Name           | Owner       | Client                | Supplier   | Start date  | End date    | Status     |
|-----|------------------------|-------------|-----------------------|------------|-------------|-------------|------------|
| 575 | DMU - Client Training  | Admin One   | Volvo Car             | Car Repair | 30 May 2023 | 04 Jun 2023 | To Deliver |
| 494 | U5 - 363               | Admin One   | Volvo Car             | Car Repair | 06 May 2023 | 03 Jul 2023 | To Deliver |
| 455 | Test Project Mini Comp | Greg Taylor | Test Client - Ben     | Car Repair | 28 Mar 2023 | 20 Jun 2023 | To Deliver |
| 392 | Test Project 2         | Admin One   | Volvo Car             | Car Repair | 24 Feb 2023 | 24 Mar 2023 | To Deliver |
| 383 | Test Project 1         | Admin One   | Volvo Car             | Car Repair | 06 Mar 2023 | 22 May 2023 | Completed  |
| 218 | Steve Test 2           | John Doe    | London Borough Client | Car Repair | 16 Jan 2023 | 31 Mar 2023 | To Deliver |
| 216 | Jane Test              | Jane Doe    | London Borough Client | Car Repair | 27 Jan 2023 | 19 Jul 2023 | To Deliver |
| 212 | New Demo Prep          | Proj Owner  | Peugeot Car           | Car Repair | 17 Dec 2022 | 31 Jan 2023 | Completed  |
| 210 | Test Demo Prep         | Admin One   | Peugeot Car           | Car Repair | 17 Dec 2022 | 31 Jan 2023 | To Deliver |
| 209 | Test Internal Demo     | Admin One   | Peugeot Car           | Car Repair | 17 Dec 2022 | 26 Dec 2022 | To Deliver |

To view the project in more detail, you will need to select the Project ID Number. Once selected, you'll be able to see more detailed information and the project progress.

Further down the page, you'll be able to see the key project detail and status of each Milestone.



The screenshot shows the 'matrix' web application interface for a specific project. The left sidebar contains a navigation menu with 'Client details', 'Project overview', 'Categories', 'Costs and dates', 'Milestones', 'Documents', 'Award type', 'Insurance', 'Cost centres', and 'Work order'. The 'Milestones' section is active, displaying a table with columns for Name, Amount, Claimed, Unclaimed, Due date, Status, and Action. Below the table, there's a 'Documents' section showing a list of documents.

| Name                                   | Amount            | Claimed           | Unclaimed         | Due date    | Status            | Action   |
|----------------------------------------|-------------------|-------------------|-------------------|-------------|-------------------|----------|
| Milestone 1<br>Updated on: 24 May 2023 | £ 5,910.00        | £ 5,910.00        | £ 0.00            | 01 Jun 2023 | Open              |          |
| Partial milestone                      | £ 955.00          |                   |                   | 01 Jun 2023 | Awaiting approval | Withdraw |
| Partial milestone                      | £ 955.00          |                   |                   | 01 Jun 2023 | Awaiting approval | Withdraw |
| Milestone 2<br>Updated on: 24 May 2023 | £ 2,865.00        | £ 0.00            | £ 2,865.00        | 02 Jun 2023 | Open              | + Claim  |
| Milestone 3<br>Updated on: 24 May 2023 | £ 955.00          | £ 0.00            | £ 955.00          | 03 Jun 2023 | Open              | + Claim  |
| <b>Totals:</b>                         | <b>£ 5,730.00</b> | <b>£ 5,910.00</b> | <b>£ 3,820.00</b> |             |                   |          |

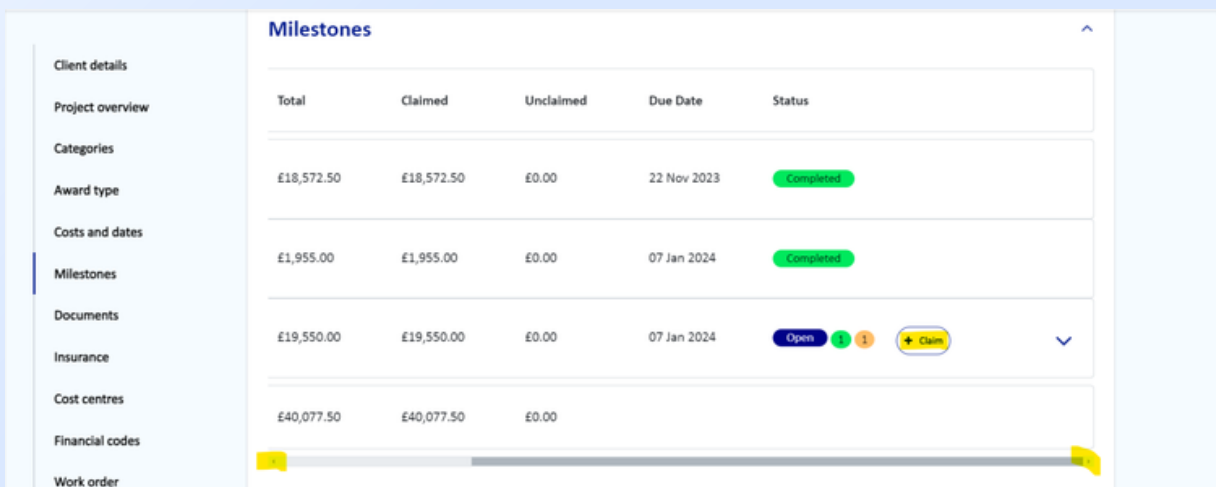
**Documents**

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# Submitting Milestones

Some Milestones may have already been completed and approved by the client. However, if you need to submit a specific Milestone, select 'Claim' next to the open Milestone.

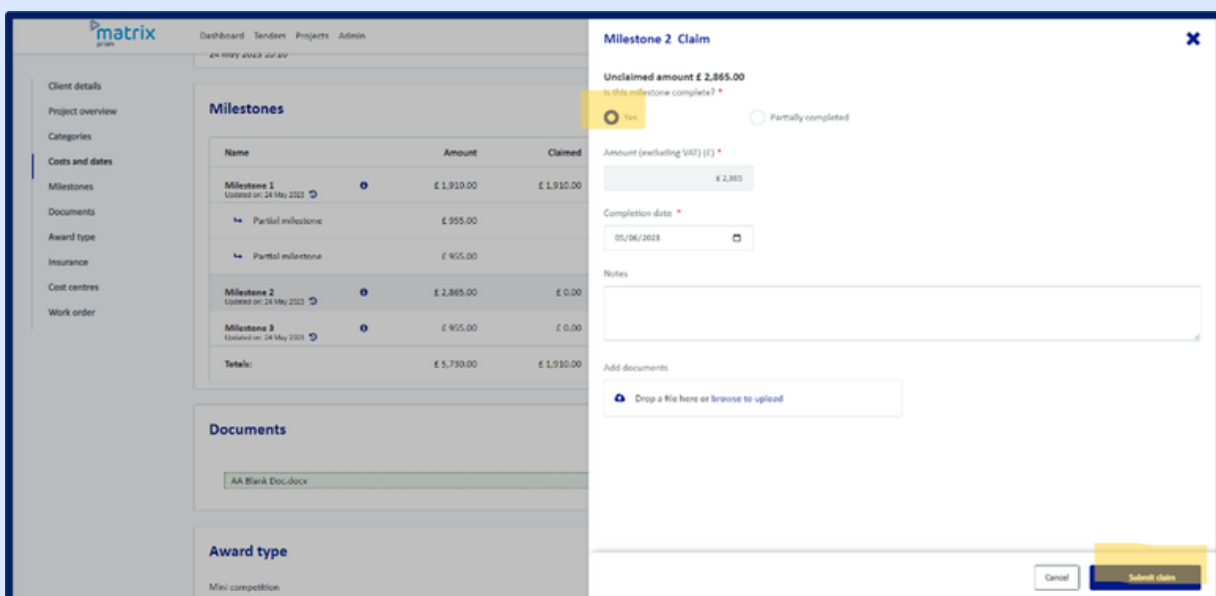
Please note you may have to scroll across the screen using the grey scroll bar to see the claim button.



| Total      | Claimed    | Unclaimed | Due Date    | Status                    |
|------------|------------|-----------|-------------|---------------------------|
| £18,572.50 | £18,572.50 | £0.00     | 22 Nov 2023 | Completed                 |
| £1,955.00  | £1,955.00  | £0.00     | 07 Jan 2024 | Completed                 |
| £19,550.00 | £19,550.00 | £0.00     | 07 Jan 2024 | Open <span>+ Claim</span> |
| £40,077.50 | £40,077.50 | £0.00     |             |                           |

You will have the option to claim for the full cost of the Milestone, or you can select 'Partially Completed' if you haven't completed the Milestone but have agreed part payment with the client.

To make a full claim, mark the Milestone as complete and submit.



**Milestone 2 Claim**

Unclaimed amount £ 2,865.00

Is this milestone complete? ☒ Full ☐ Partially completed

Amount (excluding VAT) (£)

Completion date

Notes

Add documents

Drop a file here or browse to upload

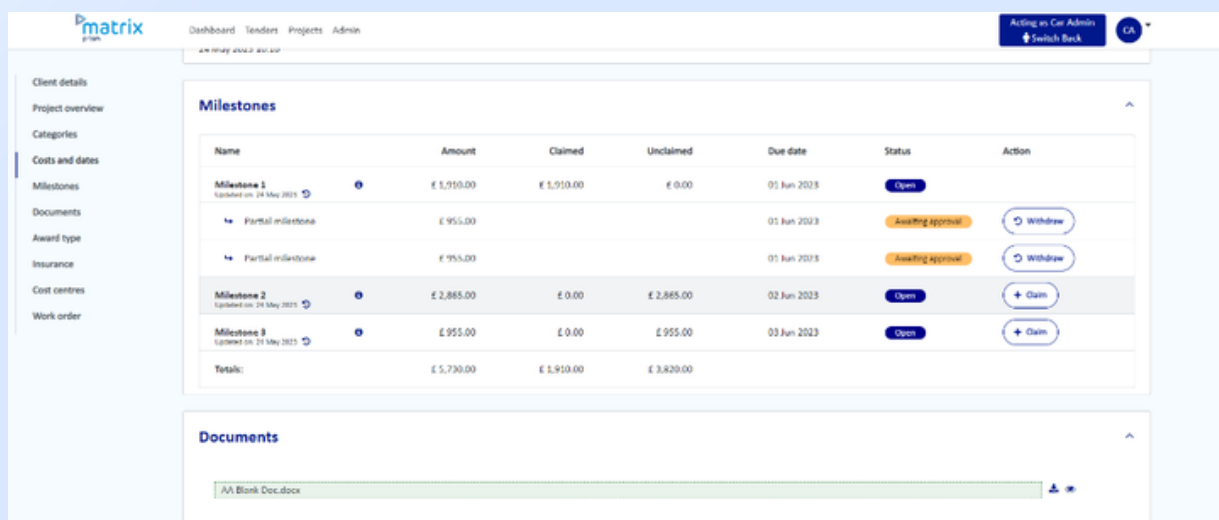
Cancel Submit claim

To make a part claim, mark the Milestone as partially complete and enter the amount you'd like to claim.

Please note, the amount you are claiming is the amount that you will receive - you do not need to incorporate the management fee.

Before selecting 'Submit Claim', please ensure any supporting comments have been attached with the Milestone Payment Report.

Once claimed, the Milestone will go to 'Awaiting Approval'. This is where the client is required to review the submitted Milestone Payment Report and either approve or reject dependant on whether the Milestone deliverables have been met.



| Name                                                         | Amount     | Claimed    | Unclaimed  | Due date    | Status            | Action   |
|--------------------------------------------------------------|------------|------------|------------|-------------|-------------------|----------|
| <b>Milestone 1</b><br><small>Updated on: 24 May 2023</small> | £ 1,910.00 | £ 1,910.00 | £ 0.00     | 01 Jun 2023 | Open              |          |
| Partial milestone                                            | £ 955.00   |            |            | 01 Jun 2023 | Awaiting approval | Withdraw |
| Partial milestone                                            | £ 955.00   |            |            | 01 Jun 2023 | Awaiting approval | Withdraw |
| <b>Milestone 2</b><br><small>Updated on: 24 May 2023</small> | £ 2,865.00 | £ 0.00     | £ 2,865.00 | 02 Jun 2023 | Open              | + Claim  |
| <b>Milestone 3</b><br><small>Updated on: 24 May 2023</small> | £ 955.00   | £ 0.00     | £ 955.00   | 03 Jun 2023 | Open              | + Claim  |
| <b>Totals:</b>                                               | £ 5,730.00 | £ 1,910.00 | £ 3,820.00 |             |                   |          |

**Documents**

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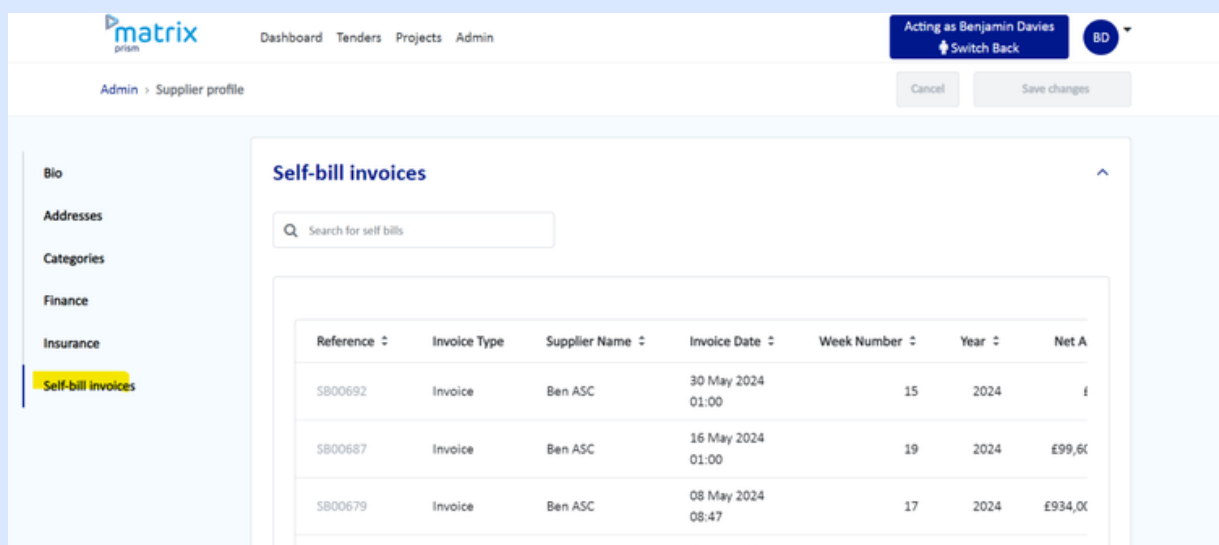
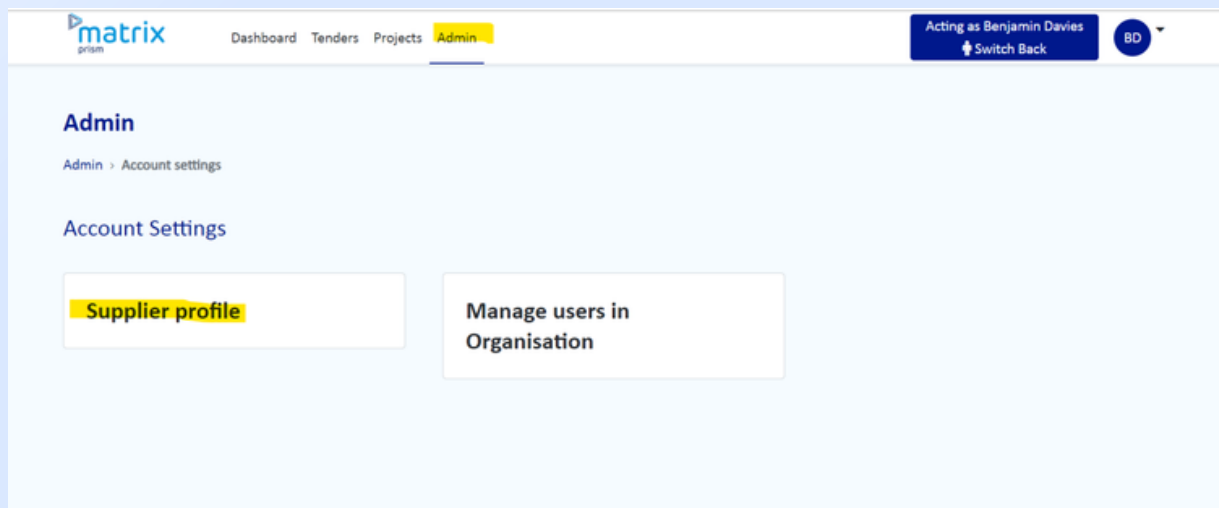
Once approved, the Milestone will be completed and sent for invoicing. You will then be paid based on the agreed payment terms.

# Invoices and Payments

Once a Milestone has been approved, you will receive your self-bill invoice the following Thursday on the weekly invoice run.

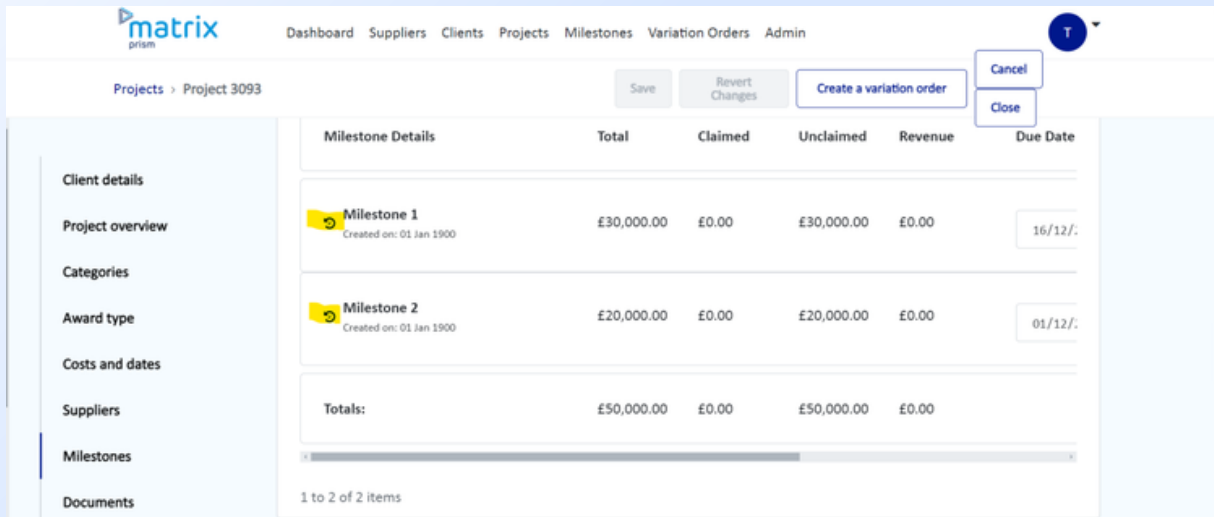
Payment will be made 30 days (45 days for existing SCM suppliers) from the date of the self-bill invoice.

Your self-bill invoice will be emailed to that finance contact that you have provided. You can also view your self-bill invoices in the 'Supplier Admin' tab under supplier profile:



# Viewing Milestone History

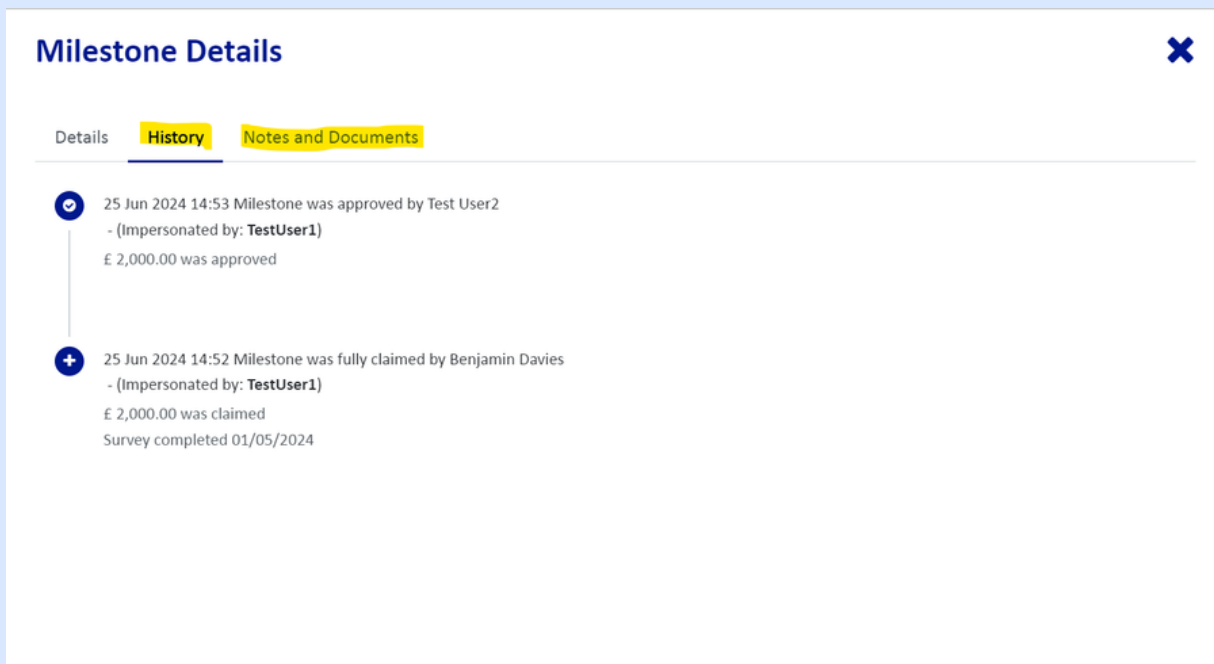
You can view the Milestone history by clicking on the history icon next to the Milestone.



The screenshot shows the 'Milestones' page for Project 3093. It features a table with columns: Milestone Details, Total, Claimed, Unclaimed, Revenue, and Due Date. Two milestones are listed: Milestone 1 and Milestone 2, both created on 01 Jan 1900. Milestone 1 has a total of £30,000.00, and Milestone 2 has a total of £20,000.00. The 'Totals' row shows a combined total of £50,000.00. A sidebar on the left contains navigation links for Client details, Project overview, Categories, Award type, Costs and dates, Suppliers, Milestones (selected), and Documents. At the top right, there are buttons for Save, Revert Changes, Create a variation order, Cancel, and Close.

| Milestone Details                             | Total      | Claimed | Unclaimed  | Revenue | Due Date |
|-----------------------------------------------|------------|---------|------------|---------|----------|
| <b>Milestone 1</b><br>Created on: 01 Jan 1900 | £30,000.00 | £0.00   | £30,000.00 | £0.00   | 16/12/.  |
| <b>Milestone 2</b><br>Created on: 01 Jan 1900 | £20,000.00 | £0.00   | £20,000.00 | £0.00   | 01/12/.  |
| <b>Totals:</b>                                | £50,000.00 | £0.00   | £50,000.00 | £0.00   |          |

You can then select the 'History' tab where you will find details of when a Milestone was submitted, when it was approved, any notes, and any documents that have been submitted.



The screenshot shows the 'Milestone Details' modal window with the 'History' tab selected. It displays a list of events related to the milestone. The first event shows the milestone was approved by Test User2 on 25 Jun 2024 at 14:53, with a note that £2,000.00 was approved. The second event shows the milestone was fully claimed by Benjamin Davies on 25 Jun 2024 at 14:52, with a note that £2,000.00 was claimed and the survey was completed on 01/05/2024.

| Details                                                                                                                                                                    | History | Notes and Documents |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------------------|
| <b>25 Jun 2024 14:53</b> Milestone was approved by Test User2<br>- (Impersonated by: <b>TestUser1</b> )<br>£ 2,000.00 was approved                                         |         |                     |
| <b>25 Jun 2024 14:52</b> Milestone was fully claimed by Benjamin Davies<br>- (Impersonated by: <b>TestUser1</b> )<br>£ 2,000.00 was claimed<br>Survey completed 01/05/2024 |         |                     |

# Management Fees

Within some projects, the supplier will absorb the fee whilst in other projects, no reductions will be made. You can see how the management fee will be added when submitting your pricing. You'll see one of two notifications:

Please note that successful supplier proposals will be subject to a management fee of 4.5%. This will be deducted from each milestone payment at the point of invoicing.

Please note that for this project no deductions are applied to the Supplier Proposal

The fee is determined upon the award type and how the fee will be added.

If the supplier absorbs the fee, the Matrix Milestone platform will calculate the fee by client cost minus the fee.

Example:

Cost = £1000

Fee = 2.25%

$£1000 - 2.25\% = £977.50$

The supplier will receive £977.50

If the project is set up without deductions, the Matrix Milestone platform will calculate the fee by supplier cost + the % fee.

Example:

Cost = £1000

Fee = 2.25%

$£1000 + 2.25\% = £1022.50$

The supplier will receive £1000

Client cost = £1022.50

# Insurance

Please remember to provide up-to-date insurance documents to avoid any delay in being awarded a project.

Your insurance documents can be uploaded at any time under your supplier profile.

Please ensure insurance levels and dates are accurate.



*Questions?*

If you have any questions or require support, contact:  
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