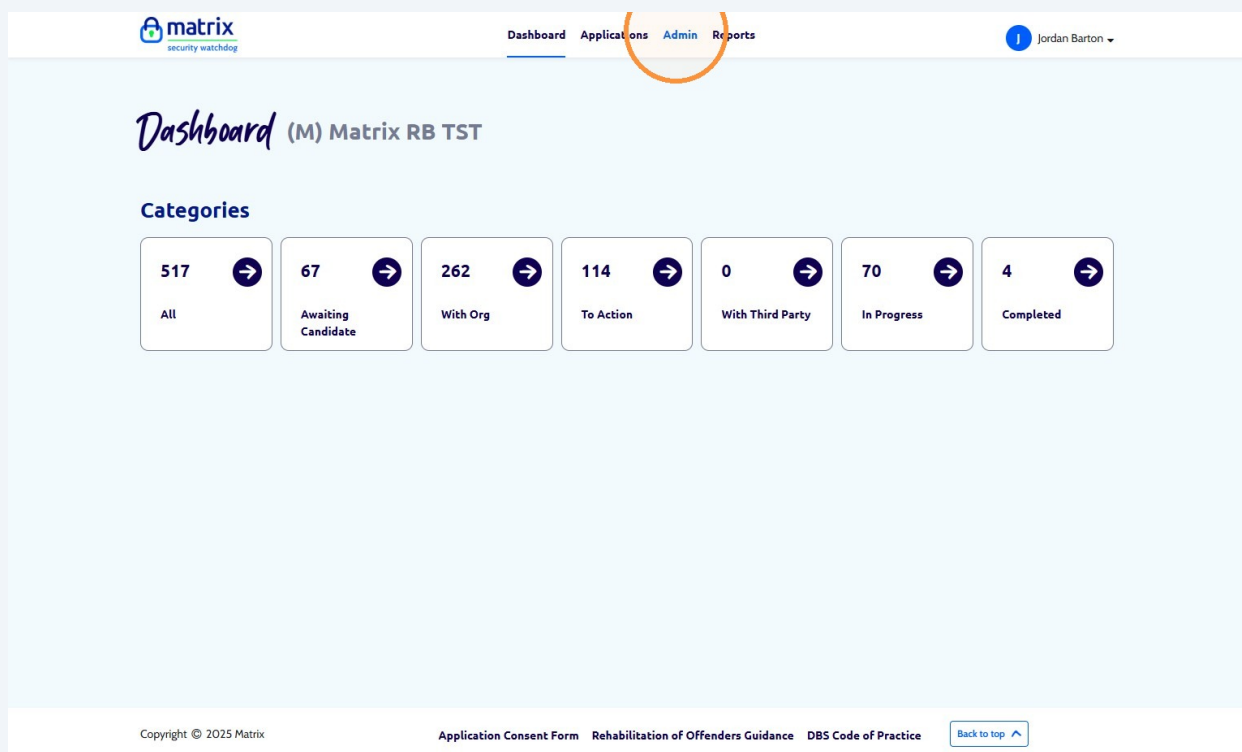


How To Add a New Organisation



This guide provides a step-by-step process for adding a new organization in the Matrix Screening system, making it essential for users who need to manage organisational data efficiently. By following these instructions, users can ensure accurate entry of vital information, streamline administrative tasks, and maintain up-to-date records. It's a valuable resource for anyone involved in organisational management or administration within the platform.

1 Click **Admin** in the toolbar



2 Navigate to **Organisations**

The screenshot shows the Matrix Admin Hub interface. At the top, there's a navigation bar with 'matrix security watchdog' logo, 'Dashboard', 'Applications', 'Admin' (selected), and 'Reports'. A user profile 'Jordan Barton' is in the top right. Below the navigation bar, there's a 'Back' link. The main heading is 'Admin Hub (M) Matrix RB TST'. A grid of menu items is displayed: 'Registered body details', 'Brand Settings', 'Application Templates', 'Comms Templates', 'Integrations', 'Job Roles', 'Services', 'User Directory', and 'Organisations'. The 'Organisations' item is circled in orange. At the bottom, there's a footer with 'Copyright © 2025 Matrix', 'Application Consent Form', 'Rehabilitation of Offenders Guidance', 'DBS Code of Practice', and a 'Back to top' link.

3 Click **Add new Organisation**

The screenshot shows the Matrix Organisations page. At the top, there's a navigation bar with 'matrix security watchdog' logo, 'Dashboard', 'Applications', 'Admin' (selected), and 'Reports'. A user profile 'Jordan Barton' is in the top right. Below the navigation bar, there's a 'Back to Admin Hub' link. The main heading is 'Organisations'. Below the heading, there's a search bar with 'Search for Organisation' and a 'Search' button. To the right of the search bar, there's a dropdown menu for 'All Statuses' and a blue button 'Add new Organisation' with a plus icon, which is circled in orange. Below the search bar, there's a table with columns: 'Name', 'Reference', 'Created Date', 'Status', 'No. of Users', 'No. of Groups', and 'Settings'. The table contains several rows of organisation data.

Name	Reference	Created Date	Status	No. of Users	No. of Groups	Settings
Andy Ltd	AndyLtd	28 Jul 2025	Draft	2	6	
AndysOrg	AndysOrg	25 Jul 2025	Draft	0	2	
AndysOrg 25/07/2025	AndysOrg25/07/2025	25 Jul 2025	Draft	0	1	
Apex Window Cleaning Tayside Ltd	ApexWindowCleaningTaysideLtd	2 Apr 2025	Draft	0	1	
Bartnik Limited	BartnikLimited	8 Apr 2025	Draft	0	1	
Bedhampton Pianoshop Limited1	BedhamptonPianoshopLimited1	4 Jul 2025	Draft	0	1	
Billing org	Billingorg	23 Apr 2025	Draft	0	1	
Business Services Ltd	BusinessServicesLtd	28 Jul 2025	Active	3	3	

4

Enter the name of the Organisation in the **Organisation Name** field. If you know the Organisation's CRN, entering this in the **CRN** field will pre-populate information for you

matrix security watchdog

Dashboard Applications Admin Reports

Jordan Barton

New Organisation

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 Audit

Organisation details

Company Registration Number (CRN)

Organisation Name *

Legal Name *

Organisation Reference *

Sector *

Address *

United Kingdom

Tips for onboarding a new organisation

Adding the company registration number (CRN) will automatically populate all the required fields under the organisation section. Don't know the CRN? Go to the [Company House Gov UK](#) to get it.

Why do we need this?

The Organisation Reference will be used to identify this organisation within the system. It will also be used by candidates of this organisation when accessing the generic link to the application portal.

5

Enter the legal name of the Organisation into the **Legal Name** field

matrix security watchdog

Dashboard Applications Admin Reports

Jordan Barton

New Organisation

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 Audit

Organisation details

Company Registration Number (CRN)

Organisation Name *

Legal Name *

Organisation Reference *

Sector *

Address *

United Kingdom

United Kingdom

Tips for onboarding a new organisation

Adding the company registration number (CRN) will automatically populate all the required fields under the organisation section. Don't know the CRN? Go to the [Company House Gov UK](#) to get it.

Why do we need this?

The Organisation Reference will be used to identify this organisation within the system. It will also be used by candidates of this organisation when accessing the generic link to the application portal.

6

The Organisation Reference will be automatically created, but this can be amended if required

matrix
security watchdog

Dashboard Applications Admin Reports

1 Jordan Barton

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 Audit

Organisation details

Company Registration Number (CRN)

Organisation Name *

Legal Name *

Organisation Reference *

Sector *

Address *

Address line 1 * Address line 2

i Tips for onboarding a new organisation

Adding the company registration number (CRN) will automatically populate all the required fields under the organisation section. Don't know the CRN? Go to the **Company House Gov UK** to get it.

i Why do we need this?

The Organisation Reference will be used to identify this organisation within the system. It will also be used by candidates of this organisation when accessing the generic link to the application portal.

7

Select the Organisation sector from the **Sector** field drop-down list

Company Registration Number (CRN)

Organisation Name *

Legal Name *

Organisation Reference *

Sector *

Q Search...

Blue Light

Central Government

Charity

Child Care

Construction

i Tips for onboarding a new organisation

Adding the company registration number (CRN) will automatically populate all the required fields under the organisation section. Don't know the CRN? Go to the **Company House Gov UK** to get it.

i Why do we need this?

The Organisation Reference will be used to identify this organisation within the system. It will also be used by candidates of this organisation when accessing the generic link to the application portal.

8 Enter the Organisation address into the **Address** field

Organisation Reference *

DEMOCO

Sector *

Charity

Address *

United Kingdom

LE2 1AA

LE2 0AH, Disjointed Ltd, 1A Garendon Street, Leicester

LE2 0AH, Tajdaar E Madina, 1A Garendon Street, Leicester

LE2 0AL, Kadiri Laundry, 1A Keythorpe Street, Leicester

LE2 0DE, 1A Donnington Street, Leicester

LE2 0DH, 1A Earl Howe Street, Leicester

LE2 0FH, 1A Buxton Street, Leicester

LE2 0FQ, 1A Chatsworth Street, Leicester

Address line 1 *

Address line 2

City *

County/State

i Why do we need this?

The Organisation Reference will be used to identify this organisation within the system. It will also be used by candidates of this organisation when accessing the generic link to the application portal.

9 Click Add new contact to enter the primary contact for the Organisation

matrix security watchdog

Dashboard Applications Admin Reports

Jordan Barton

Key contacts

Primary contact *

Add new contact +

Operations contact

Do you want to add an Operations contact?

☒ No

☐ Yes

Finance contact

Do you want to add a Finance contact?

☒ No

☐ Yes

IT contact

Do you want to add an IT contact?

☒ No

☐ Yes

10 Enter the name and email address of the primary contact

The screenshot displays the 'matrix security watchdog' application interface. On the left, a sidebar shows 'Key contacts' with sections for 'Primary contact', 'Operations contact', 'Finance contact', and 'IT contact'. Each section has a radio button to add a contact (currently set to 'No') and an 'Add new contact +' button. The main area on the right is titled 'Add a new Primary contact' and contains a form with the following fields: 'First name *' (highlighted with an orange circle), 'Last name *', 'Preferred name', 'Email address *', 'Mobile number' (with a dropdown for '+44'), and 'Work phone' (with a dropdown for '+44'). At the bottom right of the form are 'Cancel' and 'Save ✓' buttons.

11 Click **Save**

The screenshot shows the Matrix Security Watchdog interface. On the left, the 'Key contacts' section is visible, with options to add new contacts for Primary, Operations, Finance, and IT roles. On the right, a modal titled 'Add a new Primary contact' is open. The modal contains fields for First name (John), Last name (Smith), Preferred name, Email address (john@democold.com), Mobile number, and Work phone. The 'Save' button is highlighted with an orange circle.

matrix security watchdog

Dashboard Applications

Key contacts

Primary contact *

Add new contact +

Operations contact

Do you want to add an Operations contact?

☒ No ☐ Yes

Finance contact

Do you want to add a Finance contact?

☒ No ☐ Yes

IT contact

Do you want to add an IT contact?

☒ No ☐ Yes

Add a new Primary contact

First name * John

Last name * Smith

Preferred name

Email address * john@democold.com

Mobile number +44

Work phone +44

Cancel Save ✓

12 If you would like the primary contact to receive an automated email every time an application is created under their Organisation, this field can be changed to 'Yes'

The screenshot shows the Matrix Security Watchdog interface. The 'IT contact' section is visible, with options to add a new IT contact. Below this, the 'Contact preference' section is highlighted. The 'Receive application submission notifications' field is set to 'No' and is circled in orange. A 'Why do we need this?' tooltip is visible, explaining that setting this to 'Yes' will result in automated emails for all primary contacts.

matrix security watchdog

Dashboard Applications Admin Reports

Jordan Barton

IT contact

Do you want to add an IT contact?

☒ No ☐ Yes

Contact preference

Receive application submission notifications *

No

Why do we need this?

Answering this as yes will mean all primary contacts listed above will receive automated emails informing them every time an application is created under this organisation

Services

Disclosure & Barring Service (DBS)

Why do we need this?

Setting these fees allows this organisation to receive these fees for the services they receive.

Organisation DBS Basic Admin fee * £ 5.00

Organisation DBS Standard Admin fee * £ 10.00

Organisation DBS Enhanced Admin fee *

13

The Admin Fees for this organisation will be automatically populated based on default fees configured in your environment. If they need to be different for this Organisation, these can be changed

matrix
security watchdog

Dashboard Applications Admin Reports

Jordan Barton

Why do we need this?
Answering this as yes will mean all primary contacts listed above will receive automated emails informing them every time an application is created under this organisation

Services

Disclosure & Barring Service (DBS)

Why do we need this?
Setting these fees allows this organisation to receive these fees for the services they receive.

Organisation DBS Basic Admin fee *	£ 5.00
Organisation DBS Standard Admin fee *	£ 10.00
Organisation DBS Enhanced Admin fee *	£ 10.00
Organisation DBS Enhanced Adult First Admin fee *	£ 2.00

Cancel Save & Continue >

Copyright © 2025 Matrix

Application Consent Form Rehabilitation of Offenders Guidance DBS Code of Practice

Back to top

14 Click **Save & Continue**

The screenshot shows the Matrix Security Watchdog Admin interface. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Admin', and 'Reports'. The 'Admin' tab is selected. A user profile 'Jordan Barton' is in the top right. A purple information box explains the need for the DBS service. Below, the 'Services' section is titled 'Disclosure & Barring Service (DBS)'. It contains a table for configuring fees:

Fee Type	Amount
Organisation DBS Basic Admin fee *	£ 5.00
Organisation DBS Standard Admin fee *	£ 10.00
Organisation DBS Enhanced Admin fee *	£ 10.00
Organisation DBS Enhanced Adult First Admin fee *	£ 2.00

At the bottom left, there are 'Cancel' and 'Save & Continue >' buttons. The 'Save & Continue >' button is circled in orange. At the bottom of the page, there's a footer with copyright information and a 'Back to top' button.

15 You will now be redirected to the 'Personalisation' tab.

Click **Edit** to amend the values in this section

The screenshot shows the Matrix Security Watchdog Personalisation tab for 'Demo Company Ltd'. A green notification bar at the top says 'Organisation Demo Company Ltd saved as draft'. The company name is 'Demo Company Ltd' with a 'Draft' status. A 'Change Status' dropdown is on the right. A progress bar at the top shows five steps: 1. Organisation Details, 2. Personalisation, 3. Groups, 4. Org. Users, and 5. Audit. The 'Personalisation' step is selected and circled in orange. Below the progress bar, the 'Personalisation' section is titled 'Default fields'. It contains two sections of default values for application fields:

Default values for application fields (DBS Only)

Fixed list of positions applied for	Not provided
Position applied for	Not provided

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type	Not provided
Workforce	Not provided
Working with adults in regulated activity	Not provided
Working with children in regulated activity	Not provided
Working at home address	Not provided
Is volunteer	Not provided
DBS Adult first check required	Not provided
Cost code mandatory	Not provided

The 'Edit' button next to the 'Personalisation' step is circled in orange.

16

From within the 'Personalisation' tab you can specify whether applications created under this Organisation should use preset job roles or not, and whether Section Y values should be defaulted

The screenshot displays the 'matrix security watchdog' Admin interface. The top navigation bar includes 'Dashboard', 'Applications', 'Admin' (selected), and 'Reports'. The user 'Jordan Barton' is logged in. The main section is titled 'Default values for application fields (DBS Only)'. It contains a toggle for 'Fixed list of positions applied for' set to 'No' and a text input for 'Position applied for'. Below this is the 'Default values for Section Y fields (Standard/Enhanced Only)' section. It features several dropdown menus: 'Certificate type' (highlighted with an orange circle), 'Workforce', 'Working with adults in regulated activity' (with a dropdown menu open showing 'Select', 'Standard', and 'Enhanced' options), 'Working with children in regulated activity', 'Working at home address', 'Is volunteer', 'DBS Adult first check required', and 'Cost code mandatory' (a toggle set to 'No'). At the bottom, the 'Permitted levels of check' section shows 'Allow Basic applications'.

matrix security watchdog

Dashboard Applications Admin Reports

Jordan Barton

Default values for application fields (DBS Only)

Fixed list of positions applied for ☐ No

Position applied for

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type

Workforce

Working with adults in regulated activity

Working with children in regulated activity

Working at home address

Is volunteer

DBS Adult first check required

Cost code mandatory ☐ No

Permitted levels of check

Allow Basic applications ☐

17

If you process Basic, Standard and Enhanced DBS checks, you can specify which types this Organisation can invite their candidates to submit by using these toggles

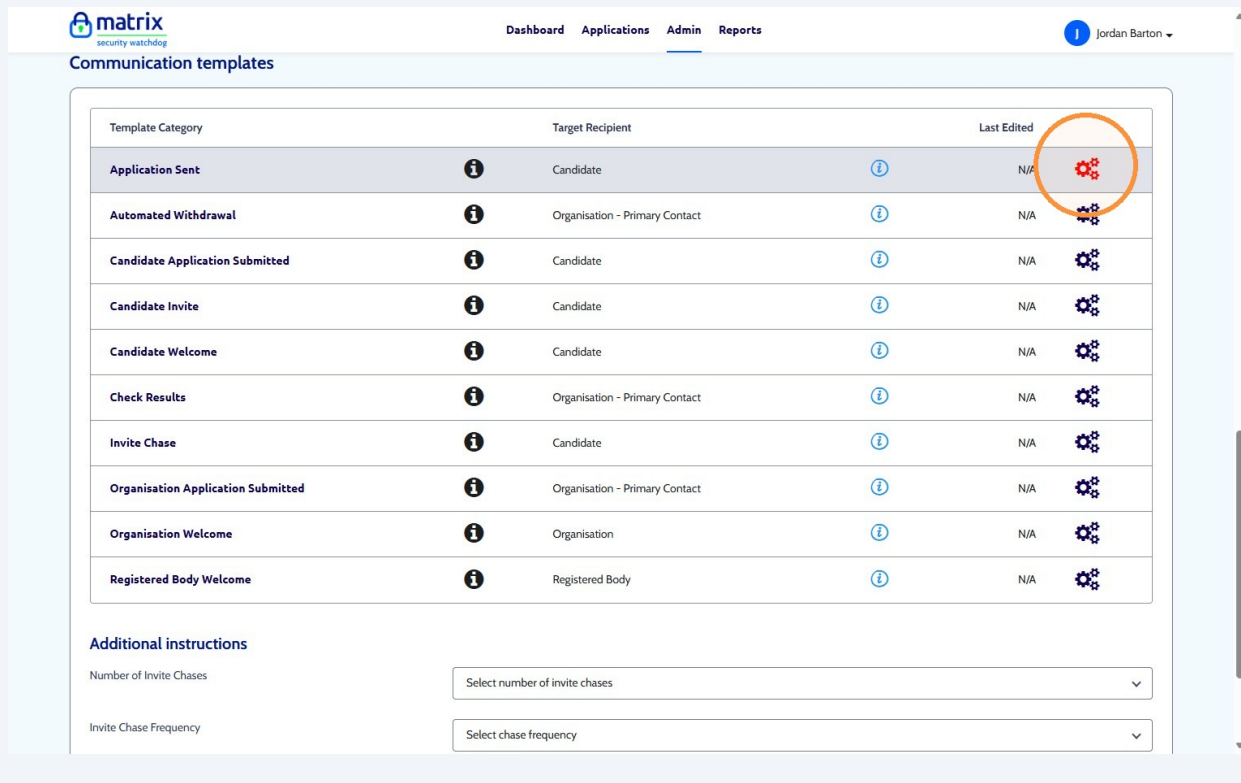
The screenshot shows the 'matrix security watchdog' Admin interface. The top navigation bar includes 'Dashboard', 'Applications', 'Admin' (selected), and 'Reports'. A user profile for 'Jordan Barton' is in the top right. The main content area has a sidebar on the left with 'DBS Adult first check required' (a dropdown menu) and 'Cost code mandatory' (a toggle switch set to 'No'). The 'Permitted levels of check' section contains two toggles: 'Allow Basic applications' (set to 'Yes') and 'Allow Standard/Enhanced applications' (set to 'Yes'). The 'Communication templates' section features a table with the following data:

Template Category		Target Recipient		Last Edited	
Application Sent	i	Candidate	i	N/A	⚙️
Automated Withdrawal	i	Organisation - Primary Contact	i	N/A	⚙️
Candidate Application Submitted	i	Candidate	i	N/A	⚙️
Candidate Invite	i	Candidate	i	N/A	⚙️
Candidate Welcome	i	Candidate	i	N/A	⚙️
Check Results	i	Organisation - Primary Contact	i	N/A	⚙️

18

The automated emails that this Organisation's candidates and users receive, will be automatically inherited from your default **Comms Templates** list.

If this Organisation requires bespoke templates specific to them, the default templates can be amended by clicking the **Settings** icon



matrix
security watchdog

Dashboard Applications Admin Reports

Jordan Barton

Communication templates

Template Category		Target Recipient		Last Edited	
Application Sent	i	Candidate	i	N/A	
Automated Withdrawal	i	Organisation - Primary Contact	i	N/A	
Candidate Application Submitted	i	Candidate	i	N/A	
Candidate Invite	i	Candidate	i	N/A	
Candidate Welcome	i	Candidate	i	N/A	
Check Results	i	Organisation - Primary Contact	i	N/A	
Invite Chase	i	Candidate	i	N/A	
Organisation Application Submitted	i	Organisation - Primary Contact	i	N/A	
Organisation Welcome	i	Organisation	i	N/A	
Registered Body Welcome	i	Registered Body	i	N/A	

Additional instructions

Number of Invite Chases

Invite Chase Frequency

19

From here, you can edit the template to contain bespoke wording that will just apply to candidates and users of this Organisation

matrix
security watchdog

Communication template

- Template Category
- Application Sent
- Automated Withdrawal
- Candidate Application Submitted
- Candidate Invite
- Candidate Welcome
- Check Results
- Invite Chase
- Organisation Application Submitted
- Organisation Welcome
- Registered Body Welcome

Edit Application Sent

Email Content ^

Subject *

Your DBS Application Has Been Submitted!

Heading *

It's Being Processed!

Salutation *

Dear

* Section 1 - Above the CTA Button

Thank you for submitting your DBS application through eBulkPlus.

We're pleased to inform you that the DBS has now received your application. Your DBS tracking reference is: [DBS Reference]

You can use this tracking reference to monitor the progress of your application at the link below.

CTA Button Label *

20

Specify how many chases to submit their application, candidates belonging to this Organisation should receive by selecting a number in the **Number of Invite Chases** field

matrix
security watchdog

Dashboard Applications Admin Reports

Jordan Barton

Candidate Application Submitted	i	Candidate	i	N/A	⚙️
Candidate Invite	i	Candidate	i	N/A	⚙️
Candidate Welcome	i	Candidate	i	N/A	⚙️
Check Results	i	Organisation - Primary Contact	i	N/A	⚙️
Invite Chase	i	Candidate	i	N/A	⚙️
Organisation Application Submitted	i	Organisation - Primary Contact	i	N/A	⚙️
Organisation Welcome	i	Organisation	i	N/A	⚙️
Registered Body Welcome	i	Registered Body	i	N/A	⚙️

Additional instructions

Number of Invite Chases

3

Invite Chase Frequency

Select chase frequency

Cancel Save ✓

Copyright © 2025 Matrix

Application Consent Form Rehabilitation of Offenders Guidance DBS Code of Practice

Back to top ^

21

Now specify the frequency of those chases by selecting a value in the **Invite Chase Frequency** field.

This will configure the time in days between each chase email that the candidate will receive

The screenshot shows the Matrix Security Watchdog Admin interface. At the top, there is a navigation bar with 'Dashboard', 'Applications', 'Admin', and 'Reports'. The 'Admin' tab is selected. On the right, the user 'Jordan Barton' is logged in. Below the navigation bar is a table with 8 rows, each representing a different event type. The 'Invite Chase' row is highlighted. Below the table, there is a section titled 'Additional instructions' with two dropdown menus: 'Number of Invite Chases' (set to 3) and 'Invite Chase Frequency' (set to 3 Days). The '3 Days' option is circled in orange. At the bottom left, there are 'Cancel' and 'Save' buttons. At the bottom right, there is a 'Back to top' button. The footer contains copyright information and links to 'Application Consent Form', 'Rehabilitation of Offenders Guidance', and 'DBS Code of Practice'.

Event Type	Icon	Recipient	Frequency	Days	Settings
Candidate Application Submitted	i	Candidate	i	N/A	⚙️
Candidate Invite	i	Candidate	i	N/A	⚙️
Candidate Welcome	i	Candidate	i	N/A	⚙️
Check Results	i	Organisation - Primary Contact	i	N/A	⚙️
Invite Chase	i	Candidate	i	N/A	⚙️
Organisation Application Submitted	i	Organisation - Primary Contact	i	N/A	⚙️
Organisation Welcome	i	Organisation	i	N/A	⚙️
Registered Body Welcome	i	Registered Body	i	N/A	⚙️

Additional instructions

Number of Invite Chases: 3

Invite Chase Frequency: 3 Days

Cancel Save

Copyright © 2025 Matrix Application Consent Form Rehabilitation of Offenders Guidance DBS Code of Practice Back to top

22 Click **Save**

The screenshot shows the Matrix Security Watchdog Admin interface. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Admin', and 'Reports'. The user 'Jordan Barton' is logged in. Below the navigation bar is a table with 8 rows of application statuses. Each row has an information icon, a status name, a role, an information icon, a status, and a settings gear icon. Below the table is a section titled 'Additional instructions' with two dropdown menus: 'Number of Invite Chases' set to '3' and 'Invite Chase Frequency' set to '3 Days'. At the bottom left, there are 'Cancel' and 'Save' buttons. The 'Save' button is circled in orange. At the bottom right, there is a 'Back to top' button.

Status	Role	Status	Settings
Candidate Application Submitted	Candidate	N/A	⚙️
Candidate Invite	Candidate	N/A	⚙️
Candidate Welcome	Candidate	N/A	⚙️
Check Results	Organisation - Primary Contact	N/A	⚙️
Invite Chase	Candidate	N/A	⚙️
Organisation Application Submitted	Organisation - Primary Contact	N/A	⚙️
Organisation Welcome	Organisation	N/A	⚙️
Registered Body Welcome	Registered Body	N/A	⚙️

Additional instructions

Number of Invite Chases: 3

Invite Chase Frequency: 3 Days

Buttons: Cancel, **Save** ✓, Back to top

23 The Organisation has now been saved as a draft status, ready to be activated when required.

Please refer to our guide 'How to create Groups within an Organisation' to learn how to split an Organisation into multiple departments/branches