

How To Flag a Query on an Application



This guide provides a step-by-step process for flagging and resolving queries within an application, ensuring users can efficiently manage and document issues. By following these instructions, users can enhance their workflow, maintain clear communication, and ensure that queries are properly tracked and resolved. It's an essential resource for anyone looking to streamline their application management tasks and improve overall productivity.

1

Navigate to <https://matrixscmlimited-tst2.outsystemsenterprise.com/MatrixScreening/Dashboard>

Dashboard Demonstration RB

Categories

38 All	14 Awaiting Candidate	17 With Org	2 To Action	0 With Third Party	2 In Progress	3 Completed
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2 Click **To Action** from the Dashboard

The screenshot shows the Matrix Security Watchdog Dashboard. The top navigation bar includes the Matrix logo, a menu with 'Dashboard', 'Applications', 'Admin', and 'Reports', and a user profile dropdown for 'DR Demo Rb'. The main heading is 'Dashboard Demonstration RB'. Below this, the 'Categories' section displays seven cards: 'All' (38), 'Awaiting Candidate' (14), 'With Org' (17), 'To Action' (2), 'With Third Party' (0), 'In Progress' (2), and 'Completed' (3). The 'To Action' card is circled in orange. At the bottom, there is a copyright notice 'Copyright © 2025 Matrix', a row of links: 'Application Consent Form', 'Rehabilitation of Offenders Guidance', 'DBS Code of Practice', and 'RB Link', and a 'Back to top' button.

3 Click the 'Our Ref' of the application you wish to flag a query on

The screenshot shows the Matrix Security Watchdog Applications page. The top navigation bar is identical to the dashboard. Below the navigation bar, there is a breadcrumb 'Dashboard > Applications' and a 'Back to Dashboard' link. The main heading is 'Applications'. The 'Categories' section shows the same seven cards as the dashboard, but the 'To Action' card is now dark blue with a downward arrow icon. Below the categories, a text block states: 'This list contains all applications that have been submitted by the organisation and are awaiting authorisation before the checks can be processed.' To the right of this text is a search bar with the placeholder 'Search for Name or Reference', a 'Search' button, and a 'Filters' button. Below the search bar is a table with the following columns: 'Date Approved', 'Name', 'Our Ref', 'Organisation', 'Status', and 'Checks Required'. The table contains two rows of data. The 'Our Ref' column in the first row is circled in orange. At the bottom left, there is a 'Results per page' dropdown set to '10' and a text '1 to 2 of 2 items'.

Date Approved	Name	Our Ref	Organisation	Status	Checks Required
10 Sep 2025	Ellis Reeves	205REEVCEFA10	Org Ref: PhotoLtd Group Ref: PhotoLtd	Awaiting Authorisation	DBS Standard/Enhanced
08 Sep 2025	Tessa Hoke	700HOKED00F0	Org Ref: PhotoLtd Group Ref: PhotoLtd	Awaiting Authorisation	DBS Standard/Enhanced

4 Click the 'Notes' tab

The screenshot displays the Matrix Security Watchdog application interface. At the top, the navigation bar includes 'matrix security watchdog', 'Dashboard', 'Applications' (selected), 'Admin', and 'Reports'. A user profile dropdown shows 'DR Demo Rb'. The breadcrumb trail is 'Dashboard > Applications > Ellis Reeves'. A 'Back to Applications' link is present. The application ID '205REEVCEFA10' is shown with a status of 'Awaiting Authorisation'. A green banner states: 'The application is now ready to be authorised by a Countersignatory'. Below this, the candidate's name 'Ellis Reeves' is displayed with a profile icon. Action buttons include 'Countersign', 'Withdraw', 'Reset ID Check', and 'Delete'. Metadata on the right shows: 'Created: 18 Aug 2025', 'Identity Check: 10 Sep 2025', 'Section Y: 10 Sep 2025', and 'Approved: 10 Sep 2025'. A tabbed interface at the bottom has 'Summary', 'Details', 'Notes' (circled in orange), 'Documents', and 'History'. The 'Summary' tab is active, showing 'Candidate Details' in a table.

Candidate Details	
Candidate Name	Ellis Reeves
Date Of Birth	13/08/1990
Reference	205REEVCEFA10
Group Name	Photo Ltd (Default)
Organisation	Photo Ltd
Organisation Reference	PhotoLtd

5 Click **Add Note**

The screenshot shows the Matrix Security Watchdog interface. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Admin', and 'Reports'. A user profile 'DR Demo Rb' is in the top right. Below the navigation, the breadcrumb is 'Dashboard > Applications > Ellis Reeves'. A 'Back to Applications' link is on the left. The application ID '205REEVCEFA10' is shown with a status 'Awaiting Authorisation'. A green banner states 'The application is now ready to be authorised by a Countersignatory'. Below this is the user's name 'Ellis Reeves' with a profile icon. To the right are buttons for 'Countersign', 'Withdraw', 'Reset ID Check', and 'Delete'. Further right, creation and approval dates are listed: 'Created: 18 Aug 2025', 'Identity Check: 10 Sep 2025', 'Section Y: 10 Sep 2025', and 'Approved: 10 Sep 2025'. A tabbed interface at the bottom has 'Summary', 'Details', 'Notes' (selected), 'Documents', and 'History'. Under the 'Notes' tab, there's a section 'Application Notes' with an 'Add Note +' button circled in orange. Below it, it says 'No notes have been added to this application'. At the very bottom, there's a footer with 'Copyright © 2025 Matrix' and links to 'Application Consent Form', 'Rehabilitation of Offenders Guidance', 'DBS Code of Practice', and 'RB Link'. A 'Back to top' button is also present.

6 Enter the title of the query in the 'Title' field

This screenshot shows the same application page as before, but with the 'Add Note' modal open. The modal has a title 'Note' and a close button 'X'. It contains a 'Title *' field, a 'Note Type *' dropdown menu (set to 'Note'), and a 'Note Content *' text area. The 'Title' field is circled in orange. Below the text area are 'Cancel' and 'Save' buttons. The background application page is dimmed.

7

Enter the Note Type as 'Query'

The screenshot displays the Matrix Security Watchdog application interface. The main content area shows the 'Application Notes' section for the application 'Ellis Reeves'. The 'Note Type' dropdown menu is highlighted with an orange circle, indicating the selection of 'Query'. The 'Title' field contains 'Application Query'. The 'Note Content' field is empty. The 'Save' button is visible at the bottom right of the note form.

matrix security watchdog

Dashboard Applications Ellis Reeves

Back to Applications

205REEVCEFA10 **Awaiting Authorisation**

The application is now ready to be

Ellis Reeves

Summary Details No

Application Notes **Add Note +**

No notes have been added to this application

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Application

Note

Title * Note Type *

Application Query Query

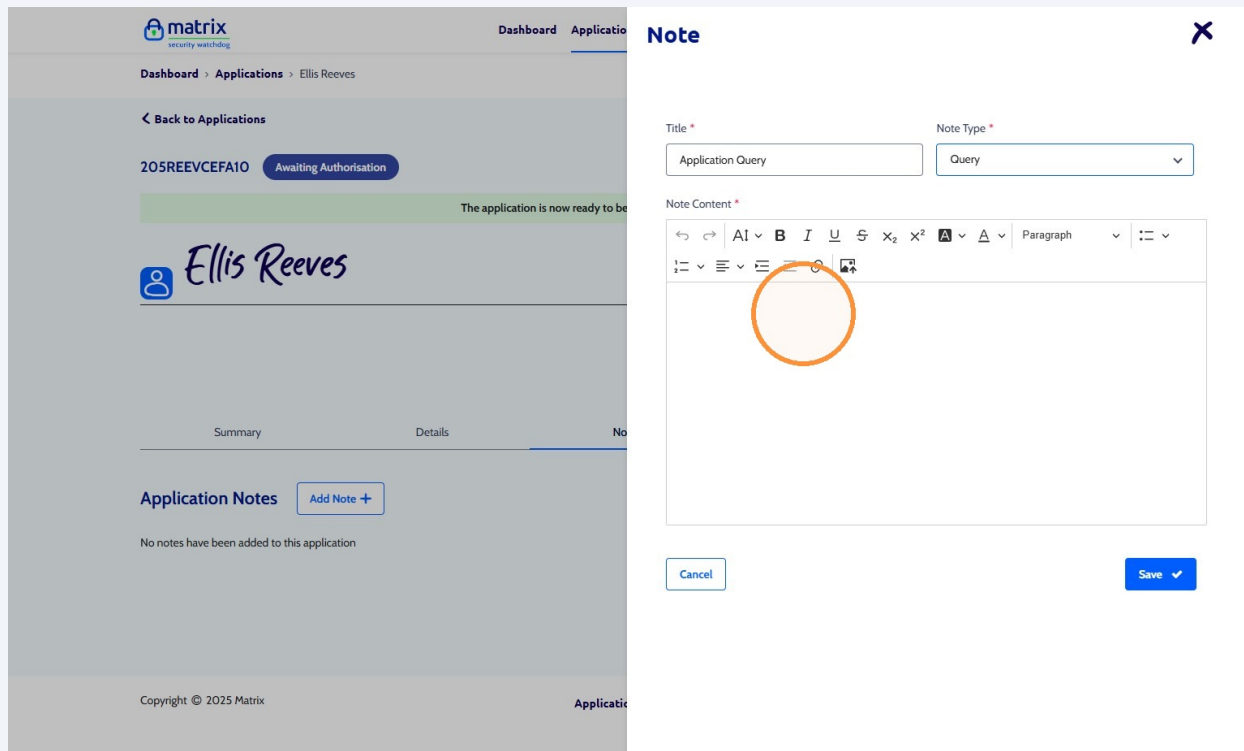
Note Content *

← → AI B I U S x₂ x² A A Paragraph

≡ ≡ ≡ ≡ ≡ ≡

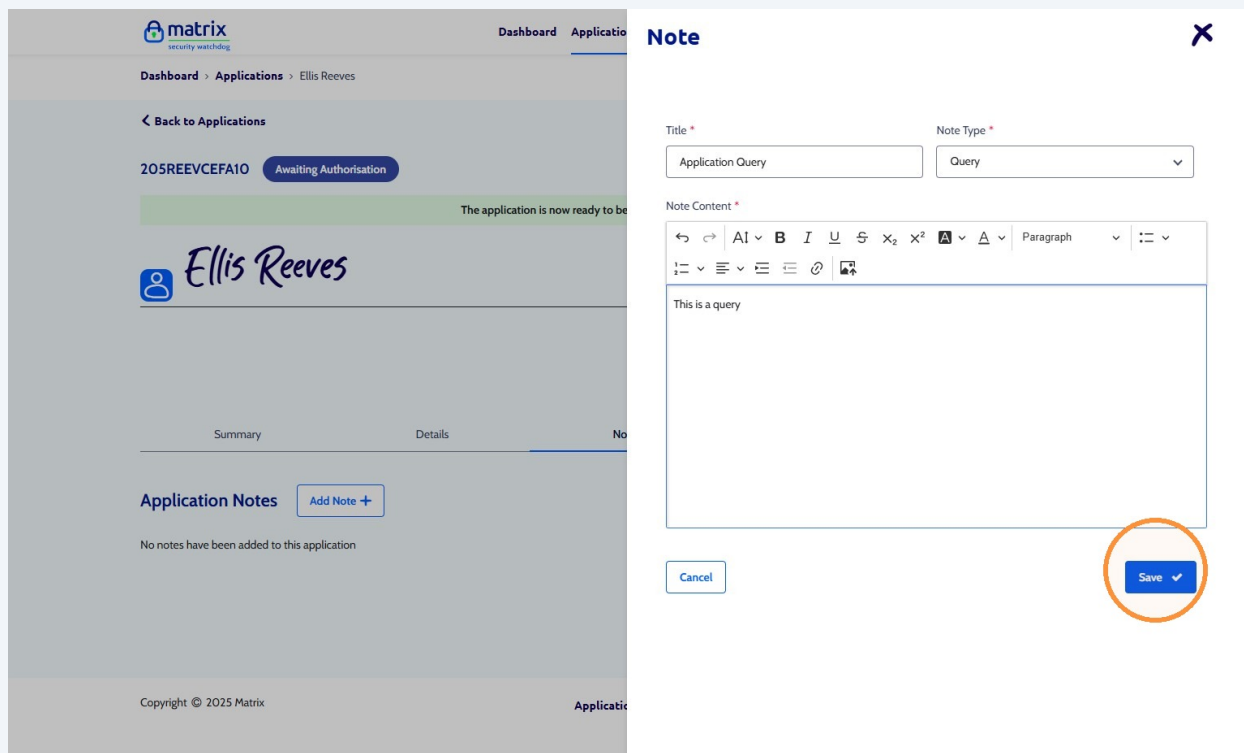
Cancel Save ✓

8 Enter the description of the query in the 'Note Content' section



The screenshot shows the Matrix Security Watchdog interface. On the left, the 'Applications' page for 'Ellis Reeves' is visible, showing the application ID '205REEVCEFA10' and a status of 'Awaiting Authorisation'. The 'Application Notes' section is empty. On the right, the 'Note' modal is open. The 'Title' field contains 'Application Query' and the 'Note Type' dropdown is set to 'Query'. The 'Note Content' text area is highlighted with an orange circle, indicating where the user should enter the description of the query. The modal also includes 'Cancel' and 'Save' buttons.

9 Click Save



The screenshot shows the same Matrix Security Watchdog interface as before. The 'Note' modal is open, and the 'Note Content' text area now contains the text 'This is a query'. The 'Save' button at the bottom right of the modal is highlighted with an orange circle, indicating where the user should click to save the note. The 'Cancel' button is also visible.

10 The application will now display a Query icon

The screenshot displays the Matrix Security Watchdog application interface. At the top, the navigation bar includes the Matrix logo, a breadcrumb trail (Dashboard > Applications > Ellis Reeves), and a user profile dropdown (DR Demo Rb). The main content area shows the application ID 205REEVCEFA10 with two status buttons: 'Awaiting Authorisation' and 'Query'. A green notification banner states: 'The application is now ready to be authorised by a Countersignatory'. Below this is the user profile for Ellis Reeves, with buttons for 'Countersign', 'Withdraw', 'Reset ID Check', and 'Delete'. To the right of the profile, a list of dates is shown: 'Created: 18 Aug 2025', 'Identity Check: 10 Sep 2025', 'Section Y: 10 Sep 2025', and 'Approved: 10 Sep 2025'. A tabbed interface at the bottom shows 'Notes' as the active tab. The 'Application Notes' section includes an 'Add Note +' button and a table with one entry:

Date	Title	Note	Created By	Query
24 Oct 2025 - 15:42	Application Query	This is a query	Demo Rb	

At the bottom left, there is a 'Results per page' dropdown set to 10 and a count of '1 to 1 of 1 items'.

11 A query flag will also be displayed in the application list view

matrix security watchdog

Dashboard Applications Admin Reports

DR Demo Rb

Dashboard > Applications

< Back to Dashboard

Applications

Categories

38 All	14 Awaiting Candidate	17 With Org	2 To Action	0 With Third Party	2 In Progress	3 Completed
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This list contains all applications that have been submitted by the organisation and are awaiting authorisation before the checks can be processed.

Search for Name or Reference Search Filters

Date Approved	Name	Our Ref	Organisation	Status	Checks Required
10 Sep 2025	Ellis Reeves	205REEVCEFA10	Org Ref: PhotoLtd Group Ref: PhotoLtd	Awaiting Authorisation	DBS Standard/Enhanced
08 Sep 2025	Tessa Hoke	700HOKE38D0F0	Org Ref: PhotoLtd Group Ref: PhotoLtd	Awaiting Authorisation	DBS Standard/Enhanced

Results per page 10 1 to 2 of 2 items

12 To remove a query, click the 'Notes' tab again

matrix security watchdog

Dashboard Applications Admin Reports

DR Demo Rb

Dashboard > Applications > Ellis Reeves

< Back to Applications

205REEVCEFA10 Awaiting Authorisation Query

The application is now ready to be authorised by a Countersignatory

Ellis Reeves

Countersign Withdraw Reset ID Check Delete

Created: 18 Aug 2025
Identity Check: 10 Sep 2025
Section Y: 10 Sep 2025
Approved: 10 Sep 2025

Summary Details Notes Documents History

Summary

Candidate Details

Candidate Name	Ellis Reeves
Date Of Birth	13/08/1990
Reference	205REEVCEFA10
Group Name	Photo Ltd (Default)
Organisation	Photo Ltd
Organisation Reference	PhotoLtd

13 Click **Add Note** to add a new note

The screenshot shows the Matrix Security Watchdog application interface. At the top, there is a navigation bar with the Matrix logo, a user profile dropdown (DR Demo Rb), and tabs for Dashboard, Applications, Admin, and Reports. Below the navigation bar, the breadcrumb trail reads 'Dashboard > Applications > Ellis Reeves'. A 'Back to Applications' link is visible. The application ID '205REEVCEFA10' is displayed with status buttons 'Awaiting Authorisation' and 'Query'. A green banner states: 'The application is now ready to be authorised by a Countersignatory'. Below this, the user 'Ellis Reeves' is shown with a profile icon and buttons for 'Countersign', 'Withdraw', 'Reset ID Check', and 'Delete'. Metadata on the right includes: 'Created: 18 Aug 2025', 'Identity Check: 10 Sep 2025', 'Section Y: 10 Sep 2025', and 'Approved: 10 Sep 2025'. A tabbed interface at the bottom shows 'Summary', 'Details', 'Notes' (active), 'Documents', and 'History'. The 'Notes' tab contains an 'Add Note +' button, which is circled in orange. Below the button is a table of application notes.

Date	Title	Note	Created By	Query
24 Oct 2025 - 15:42	Application Query	This is a query	Demo Rb	 

Results per page: 10 1 to 1 of 1 items

14 Add a title

The screenshot shows the Matrix Security Watchdog interface. On the left, the application details for '205REEVCEFA10' are visible, including a status of 'Awaiting Authorisation' and a 'Query' button. The user 'Ellis Reeves' is logged in. The 'Application Notes' section shows a table with one entry: '24 Oct 2025 - 15:42' with the title 'Application Query'. An 'Add Note +' button is present. On the right, the 'Note' modal is open. The 'Title' field is highlighted with an orange circle and is currently empty. The 'Note Type' dropdown is set to 'Note'. The 'Note Content' field is also empty. The modal includes a rich text editor toolbar and buttons for 'Cancel', 'Save', and 'Save & remove query'.

15 Enter the note content

The screenshot shows the same Matrix Security Watchdog interface as in step 14. In the 'Note' modal, the 'Title' field now contains the text 'Query Resolved'. The 'Note Content' field is still empty and is highlighted with an orange circle, indicating where the user should enter the note content. The 'Note Type' dropdown remains set to 'Note'. The 'Cancel', 'Save', and 'Save & remove query' buttons are still visible at the bottom of the modal.

16 Click **Save & remove query**

The screenshot shows the Matrix Security Watchdog application interface. The main panel displays the application details for 'Ellis Reeves' with a status of 'Awaiting Authorisation' and a 'Query' button. A green banner indicates 'The application is now ready to be...'. Below this, there are tabs for 'Summary', 'Details', and 'Notes'. The 'Notes' tab is active, showing a table of application notes. The table has columns for 'Date', 'Title', and 'Note'. One note is visible, dated '24 Oct 2025 - 15:42', with the title 'Application Query' and the note 'This is a que...'. Below the table, there is a 'Results per page' dropdown set to '10' and a '1 to 1 of 1 items' indicator.

The 'Note' modal is open, showing the following fields:

- Title ***: Query Resolved
- Note Type ***: Note
- Note Content ***: This query was resolved

At the bottom of the modal, there are three buttons: 'Cancel', 'Save', and 'Save & remove query'. The 'Save & remove query' button is highlighted with an orange circle.