

SCOPE

SCOPE User Guide – Parent / Child

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Parent / Child Intro

- Parent / Child structure allows Scope users to manage how different business units
- Data created in the parent account can be inherited by child accounts.
- Settings need to be managed in the child accounts directly.

CREATED & MANAGED IN PARENT

- Rate cards
- Clients
- Brands
- Custom fields
 - Scope fields
 - Rate card fields
- Scoping data
 - TPCs
- Output templates
- SSO / SAML integration

MANAGED IN CHILD

- Application Settings
- Permissions
 - Setting permissions
 - Permission profiles
- Member invites
 - Member settings
 - Approval settings
- Scoping data
 - Deliverables & Components
 - TPCs

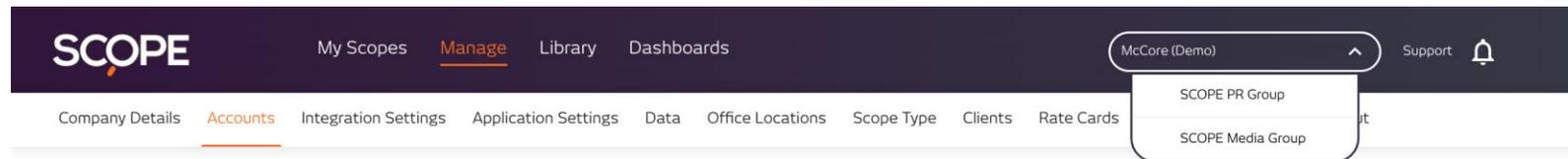
Parent / Child Intro

- Data created in the parent account can be inherited by the Child account.
- Who inherited what data is managed in the 'Accounts' section of SCOPE.
- To access the accounts section go to
 - Manage > Accounts
- Here you can see a list of child accounts associated with the parent
- Select the child you want to administer and click 'edit settings'

The screenshot shows the SCOPE web application interface. The navigation bar at the top includes the SCOPE logo, 'My Scopes', 'Manage', 'Library', and 'Dashboards'. A dropdown menu is open for 'McCore (Demo)', showing 'SCOPE PR Group' and 'SCOPE Media Group'. The 'Accounts' section displays three account cards: 'McCore (Demo)' (United Kingdom), 'SCOPE Media Group' (United Kingdom), and 'SCOPE PR Group' (United Kingdom). Each card has an 'Edit Settings' button and a 'Set-up New Account' button.

Parent / Child Switcher

- As a user who has access to the parent account and one (or more) child accounts you can switch between
- The account switcher will appear in the top navigation bar



- Click the switcher to select the account you would like to switch to
 - The account you are viewing will appear on the top navigation bar



Company Details

1. Edit from parent
2. Edit as child

Company Details – Edit as parent

Parent users can manage company details for their child accounts - From the Parent

1. Go to Manage > Accounts
2. Select the account you would like to manage company details for
3. Go to the 'Company Details' Tab

The screenshot shows the SCOPE user interface. At the top, there is a navigation bar with 'SCOPE' logo, 'My Scopes', 'Manage', 'Library', and 'Dashboards'. A dropdown menu shows 'McCore (Demo)'. Below this is a secondary navigation bar with 'Company Details', 'Accounts', 'Integration Settings', 'Application Settings', 'Data', 'Office Locations', 'Scope Type', 'Clients', 'Rate Cards', 'Members', 'Groups', and 'Output'. The 'Accounts' section is active, displaying three account cards. The 'SCOPE Media Group' card is highlighted with an orange border and has an 'Edit Settings' button highlighted with a blue box. Above it, a 'Set-up New Account' button is also highlighted with a blue box. The 'McCore (Demo)' dropdown menu in the top navigation is also highlighted with a blue box.

The screenshot shows the 'Company Details' page for 'SCOPE Media Group'. The 'Company Details' tab is selected in the top navigation. The page displays various fields for editing company information, including Company name, Country, Number of SCOPE Members, Agency Discipline, Agency Industry Speciality, Price Plan, and Subdomain. A 'Save Changes' button is visible in the top right corner.

Company Set-up		Parent Company	
SCOPE Media Group		McCore (Demo)	
Company name	SCOPE Media Group	Country	United Kingdom
Number of SCOPE Members	5	Agency Date Format	DD/MM/YYYY
Agency Discipline	Media	Default Third Party Cost Mark Up	0
Agency Industry Speciality	B2C	MSA fees & rebates	Add new MSA Line Item
Price Plan	Enterprise +	FTE	1800
Subdomain	omnicommediagroup-291		

Company Details – Edit as child

Or, Parent users can edit the Company Details from within their child accounts

1. Choose the child account from the Child Account selector
2. Go to Manage > Company Details

SCOPE My Scopes **Manage** Library Dashboards

SCOPE PR Group Support

Company Details Integration Settings Application Settings Data Scope Type Clients Rate Cards Members Output

Company Details

[Save Changes](#)

Company name SCOPE PR Group	Country United Kingdom
Number of SCOPE Members 2	Agency Date Format DD/MM/YYYY
Agency Discipline Full service	Default Third Party Cost Mark Up 0
Agency Industry Speciality Other	MSA fees & rebates Add new MSA Line Item
Price Plan Enterprise +	FTE 1800
Subdomain havas-382	

Upload Company logo

Drag and drop or browse
Recommend min 200x200px
Maximum file size is 5MB

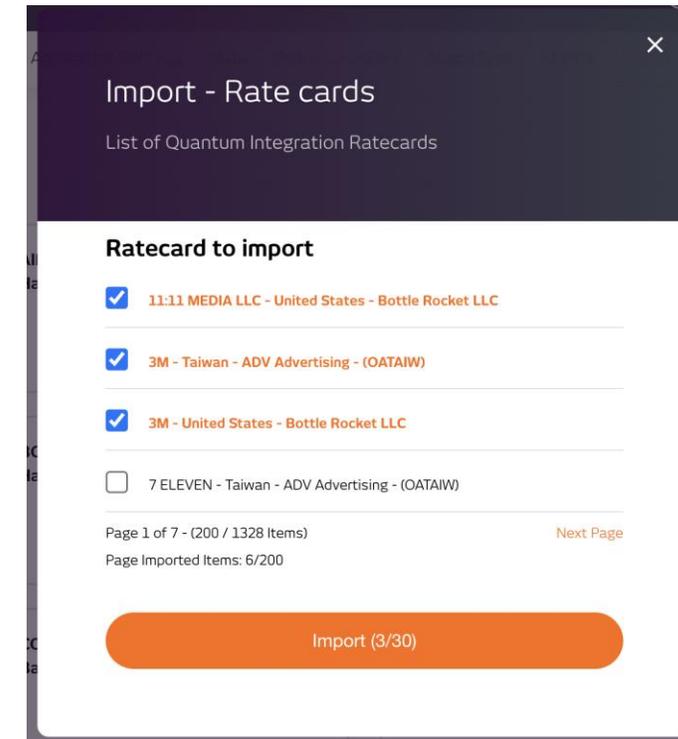
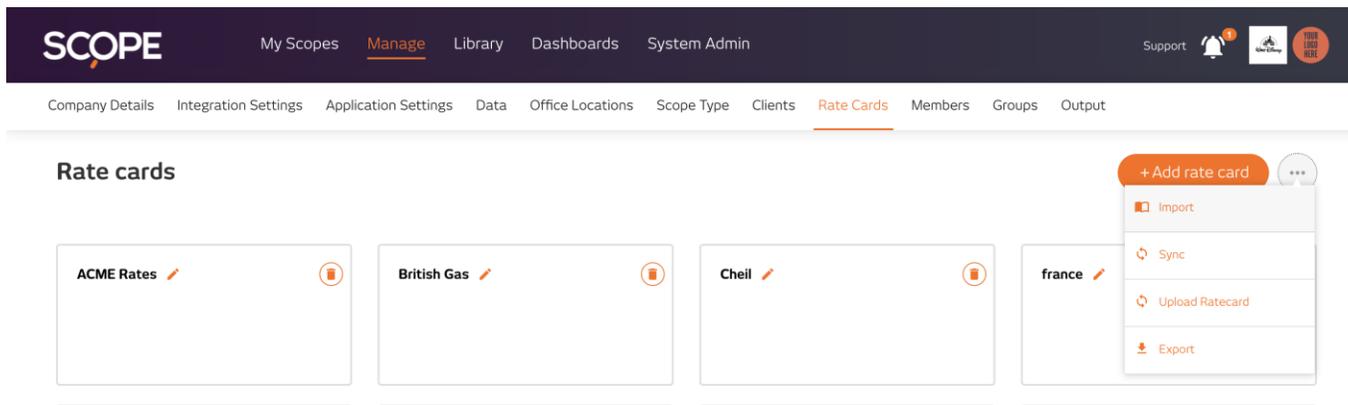
[Browse](#)

1. Rate cards

1. Import rate cards
2. Upload rate cards
3. Create rate card manually
4. Export rate cards
5. Assign rate cards to a client
6. Assign rate cards to a brand
7. Sharing rate cards to child accounts

1.1 Importing rate cards

- If you have an integration with your ERP, ratecards can be pushed into SCOPE



Click:

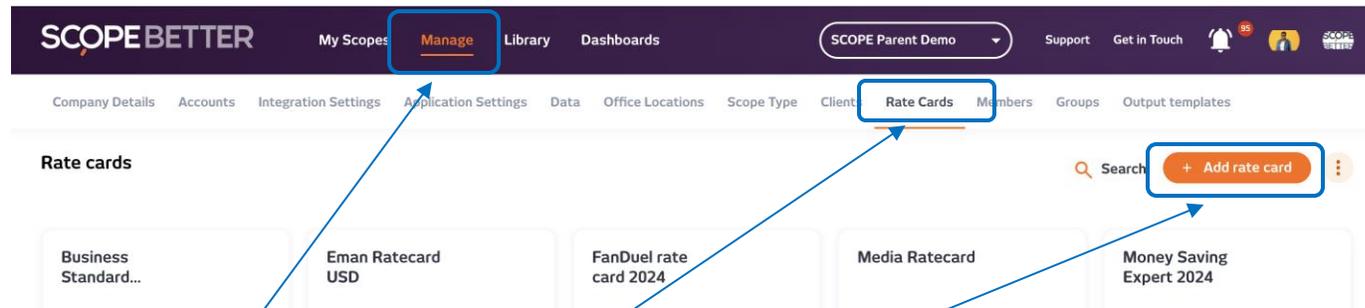
- Manage > rate cards > (...)
- Import

See rate card selector pop up

- Select the rate cards you would like to import

1.2 Upload rate cards (1)

- Upload one or multiple rate cards directly into SCOPE using the **Excel uploader template**

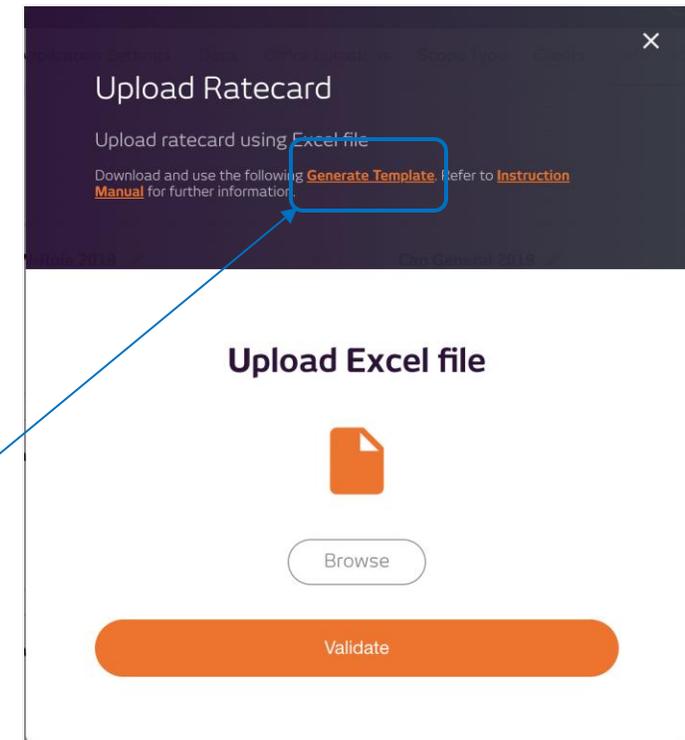


Click:

- Manage > Rate cards > (...)
- Upload Rate card

See rate card uploader pop up

- Click 'Generate Template' to download the excel template



1.2 Upload rate cards (2)

○ Populate your excel template with your rate card data using the structure provided:

- Ratecard Name
- Currency (i.e. USD/GBP/EUR)
- Department name
- Role name
- Rate (this is the charge out rate per hour)
- Cost (this is the cost rate per hour)

	A	B	C	D	E
1	Rate-card Name	ABC Client Ratecard 2020			
2	Department Name	Agency Role	Rate	Cost	Custom Field 1
3	Client Services	Group Account Director	300	120	L2
4		Account Director	350	100	L1
5		Senior Account Manager	190	70	L5
6		Account Manager	150	70	L4
7		Account Executive	110	55	L3
8	Media	Executive Vice President	500	200	L1
9		Media Director	289	90	L2
10		Associate Media Director	240	70	L1
11		Media Supervisor	140	50	L3
12		Media Planner	120	50	L2
13		Associate Media Planner	80	50	L1
14	Paid Social	Vice President, Paid Social	300	100	L1
15		Director, Paid Social	250	100	L2
16		Associate Director, Paid Social	170	80	L2
17		Paid Social Supervisor	140	60	L3
18		Paid Social Manager	120	50	L2
19		Paid Social Associate	80	30	L1
20	Strategy	Executive Vice President, Strategy	500	100	L3
21		Senior Vice President, Strategy	450	150	L2
22		Group Vice President, Strategy	400	130	L1
23		Vice President, Strategy	320	100	L3
24		Director, Strategy	350	80	L2
25		Manager, Research	120	60	L3
26		Analyst, Research	80	50	L2
27					
28					

NOTE -

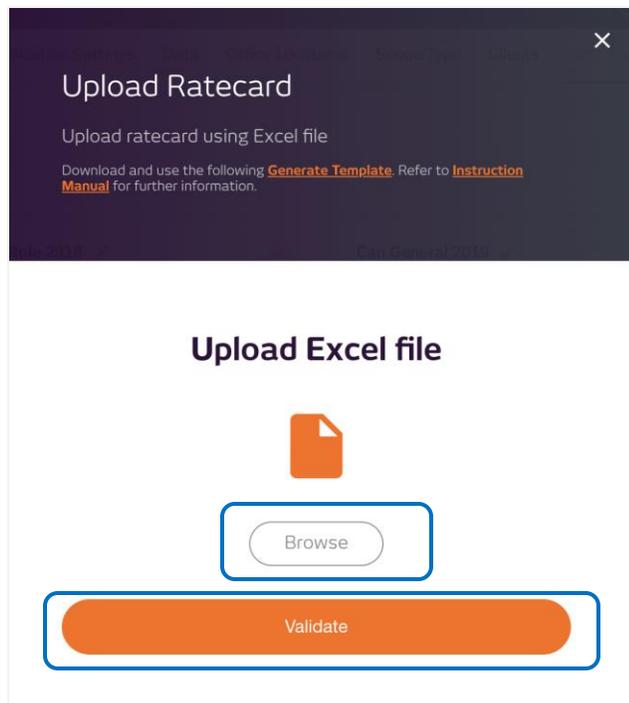
- If uploading multiple rate cards, each different rate card needs to be on a separate tab (example below)
- All roles should be grouped by the department (do not duplicate department name in the Department name column)
- The format **cannot** be changed otherwise the upload will fail

Creative			85
2022 EMEA Rate cards - UK - s	USD Example	UK Example	2022 EMEA Rate cards - UK - R

1.2 Upload rate cards (3)

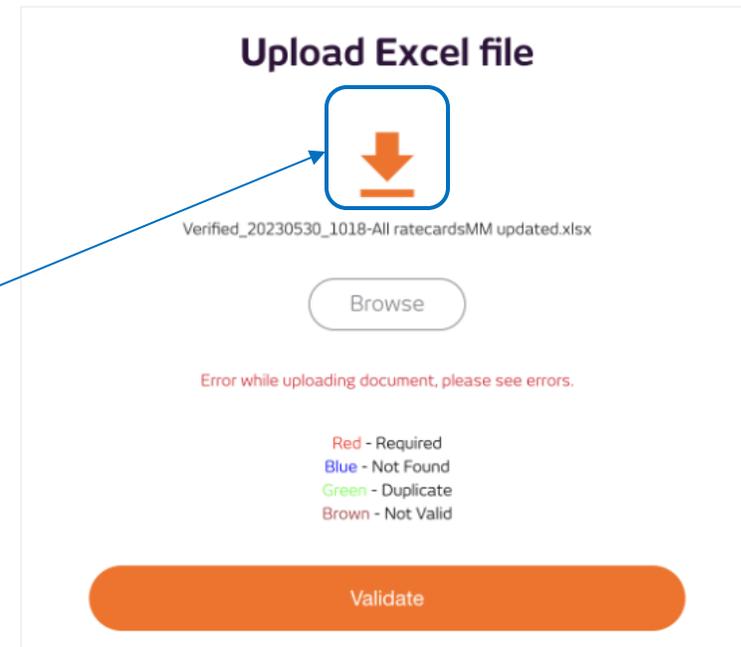
Once your file is ready for upload click 'Browse'

1. Choose the file you wish to upload
2. Click 'Validate' - wait for the file to be validated and then click 'upload'



- Click the arrow icon to download
- See any errors with the uploaded file highlighted according to the colour code
- Make change and save to re-upload

In the case of any invalid or missing data in the upload file, you will see the option to download the validated excel file.



1.3 Create rate cards manually

To create a ratecard manually go to **manage > ratecards > + Add rate card**

1. Add departments and roles, rates and costs to build out your rate card by selecting the pencil icon
2. Save changes

Create Ratecard

Create a new ratecard providing name and currency. Optionally use a Ratecard Structure to base the ratecard off.

Ratecard Name

Currency

Ratecard Structure

Start building Ratecard

Ratecard Name: UK 300 roles ✓

Currency: GBP

Location Card: default

Default ratecard:

Version: 1

Cancel Save

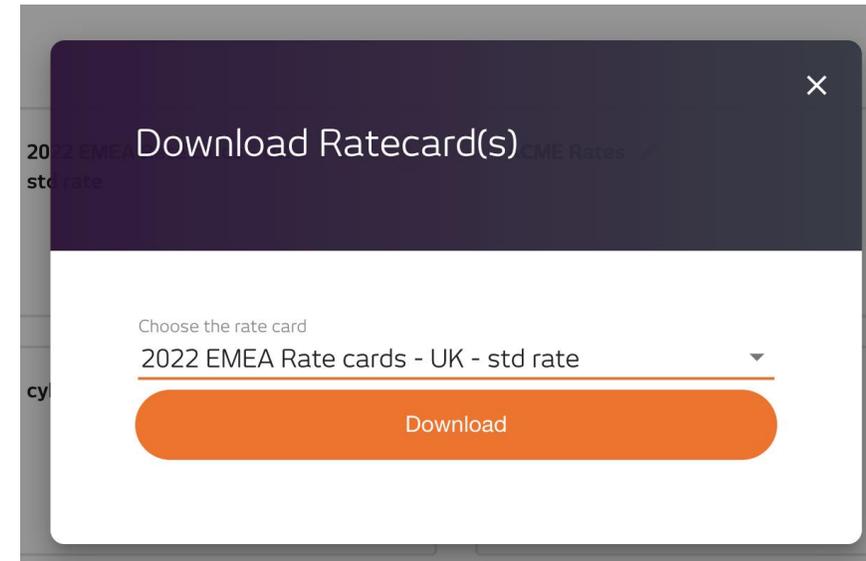
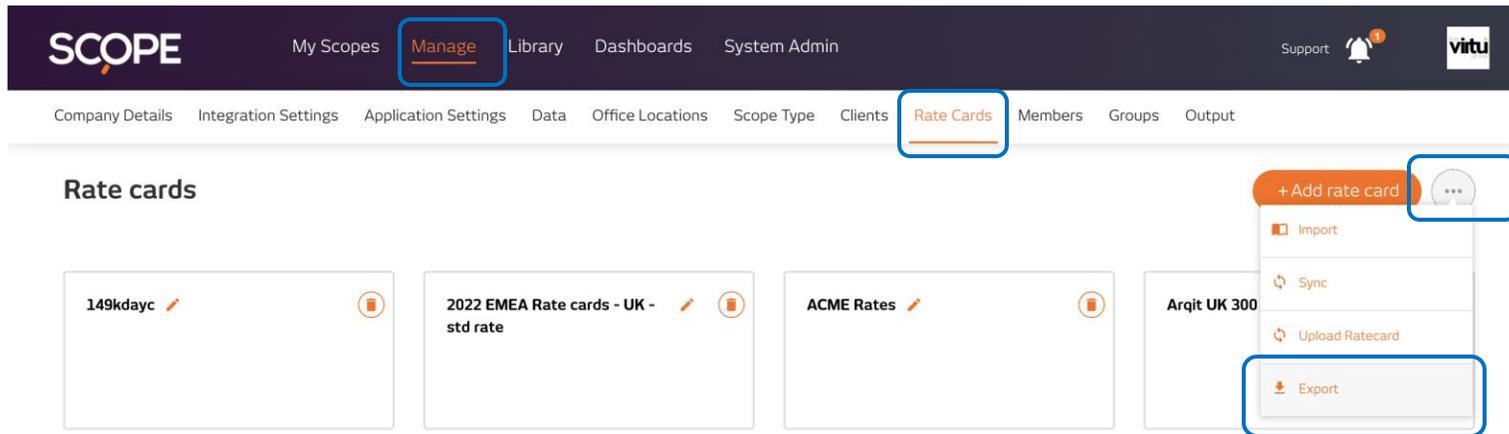
Departments	Agency Roles	Agency Role Configuration
3D ART / VFX - HLV 25 >	3D Artist	Agency Role Name L-Code 3D Artist
ACCOUNT MANAGEMENT - LOCAL 5 >	Senior 3D Artist	Rate 97.07 (GBP)
ADAPT - UA 5 >	3D Artist (modeling)	Cost 0.00 (GBP)
ANIMATION - HLV 17 >	Senior 3D Artist (modeling)	
ART & ILLUSTRATION - HLV 12 >	3D Artist (texturing)	
BACK-END DEV - HLV 11 >	Senior 3D Artist (texturing)	
BUSINESS ANALYSIS - HLV 2 >	3D Artist (rigging)	
	Enter new role	
	Rate	
	Cost	

1 ROLE TO SCOPE MARK MAPPING 2 ROLE TO DISCIPLINE MAPPING

Select Role Type Select Role Discipline Enter Split Value (%) Add

1.4 Export rate cards

- To export **one** or **all** of your rate cards go to **manage > rate cards**
 - Select to export all rate cards or the one you would like to download



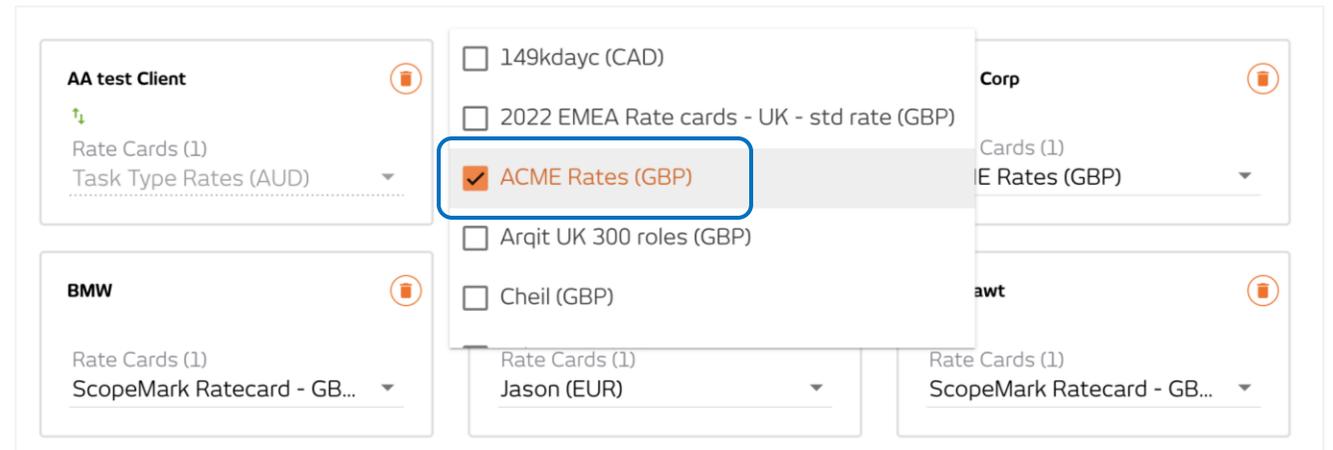
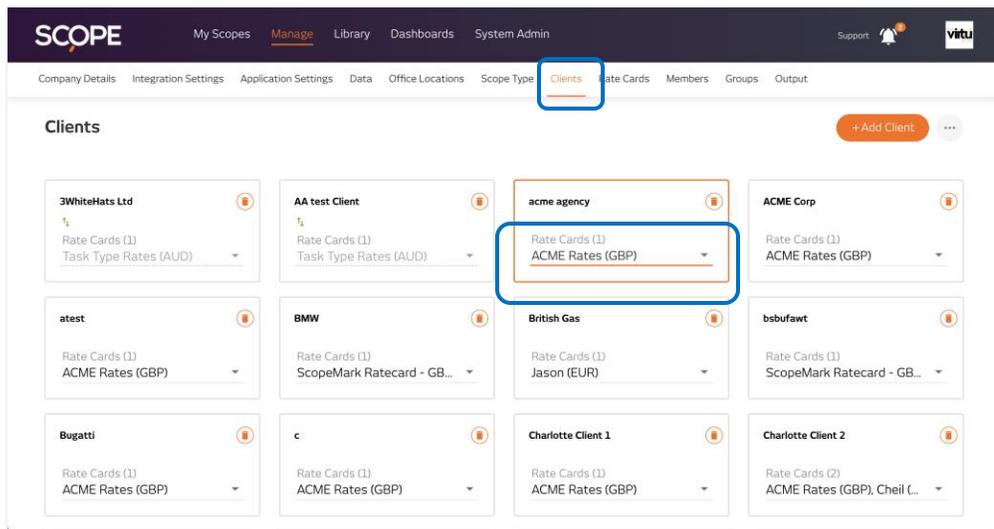
TIP

Downloaded rate cards can be edited and re-uploaded. This will update the data on your rate card and create a new ratecard version.

1.5 Assign rate card to a client

To assign a rate card to a client go to **Manage > Clients**

1. Select the client you would like to assign a rate card to
2. Click the dropdown and select the ratecard you would like to associate with that client
3. This can be done on the overall client page or on a specific client page



TIP

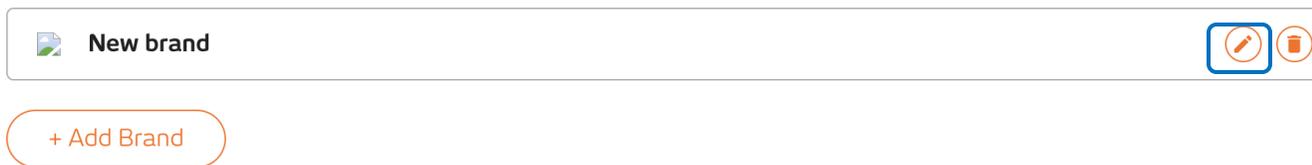
Multiple ratecards can be assigned to one client

1.6 Assign rate card to a brand

To assign a rate card to a brand, select the client the brand belongs to

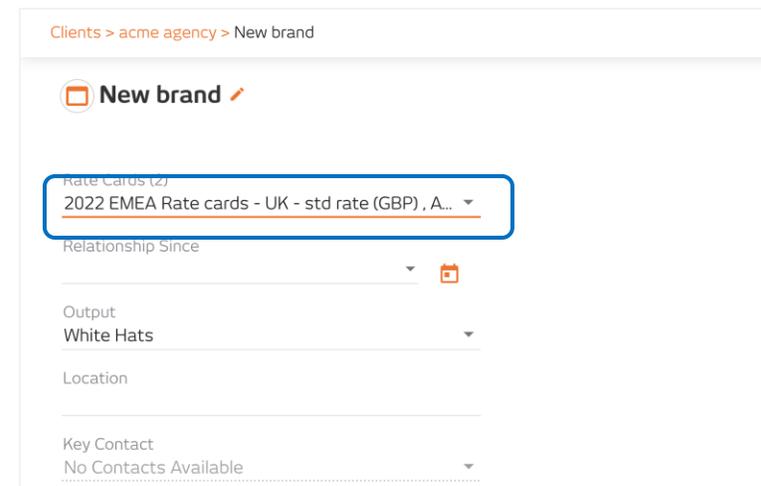
1. In the **Brand** section of the **Client** page, click the edit icon
2. Select the ratecard you would like to associate with the brand
 - **NOTE** – you can only associate a rate card to a brand which is also associated with the larger client

Brands



New brand

+ Add Brand



Clients > acme agency > New brand

New brand

Rate Cards (2)
2022 EMEA Rate cards - UK - std rate (GBP) , A...

Relationship Since

Output
White Hats

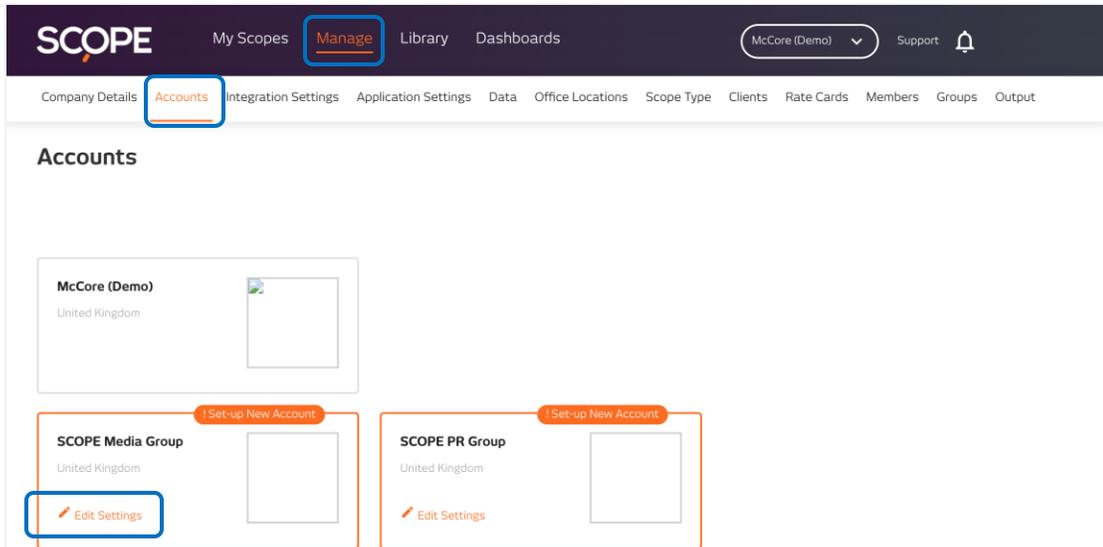
Location

Key Contact
No Contacts Available

1.7 Sharing rate cards to child accounts

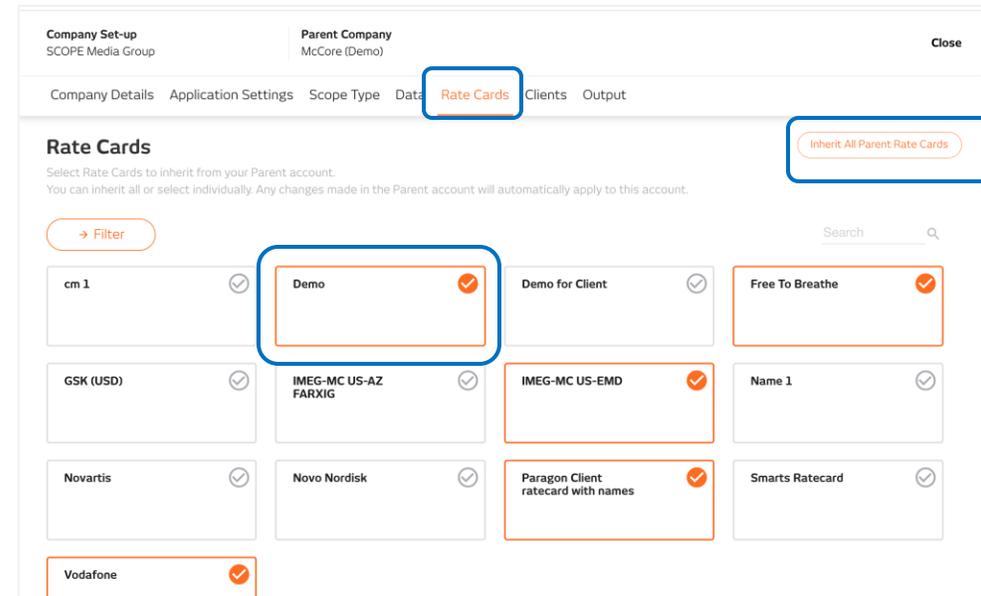
To share a rate card from parent to child go to manage > accounts

1. Select the child Account you would like to share the rate card to
2. Click 'edit settings'



Click the 'rate card' tab and select the rate card you want to share with the child account

- Any rate card with a tick and orange border will be inherited by the child account – or choose 'inherit all'



NOTE:

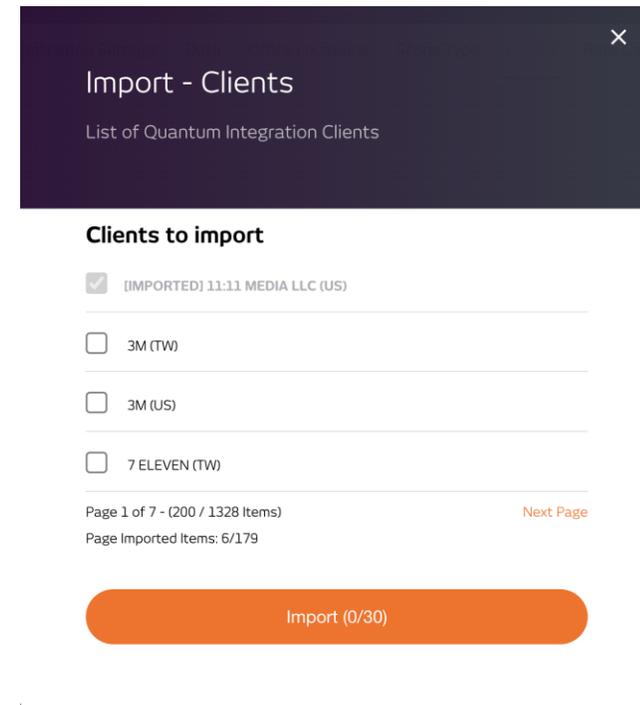
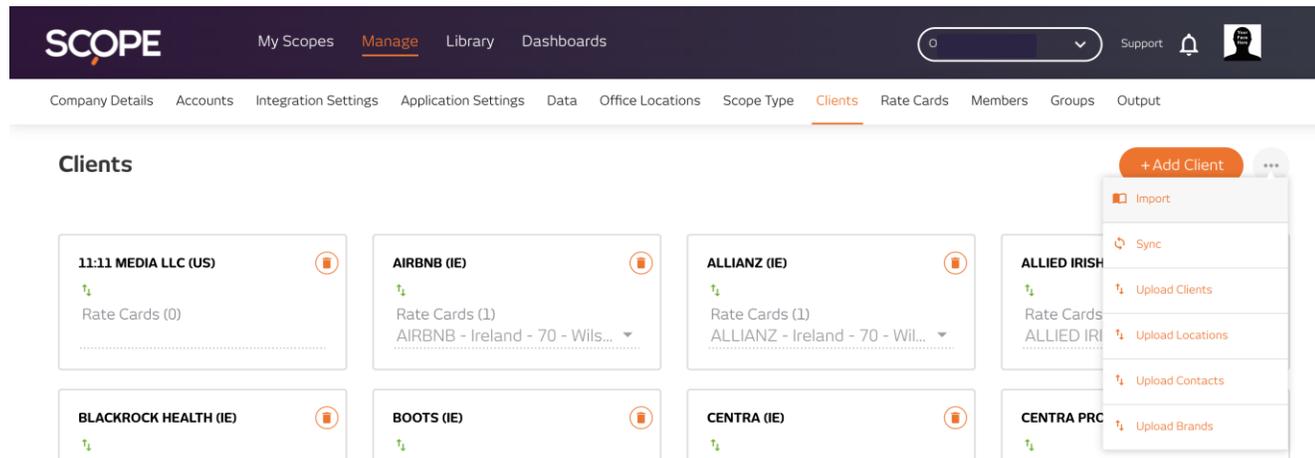
- Any edits to rate cards in the parent account will be inherited by the child account automatically
- Any new rate cards created by the parent will need to be selected and shared to the child account

Clients

1. Import clients
2. Upload clients
3. Create client manually
4. Assign brand to client
5. Sharing clients to child accounts
6. Sharing brands to child accounts

2.1 Importing clients

- If you have an integration with your ERP, clients can be pushed into SCOPE



Click:

- Manage > Clients > (...) and click 'Import'

See client selector pop up

- Select the clients you would like to import

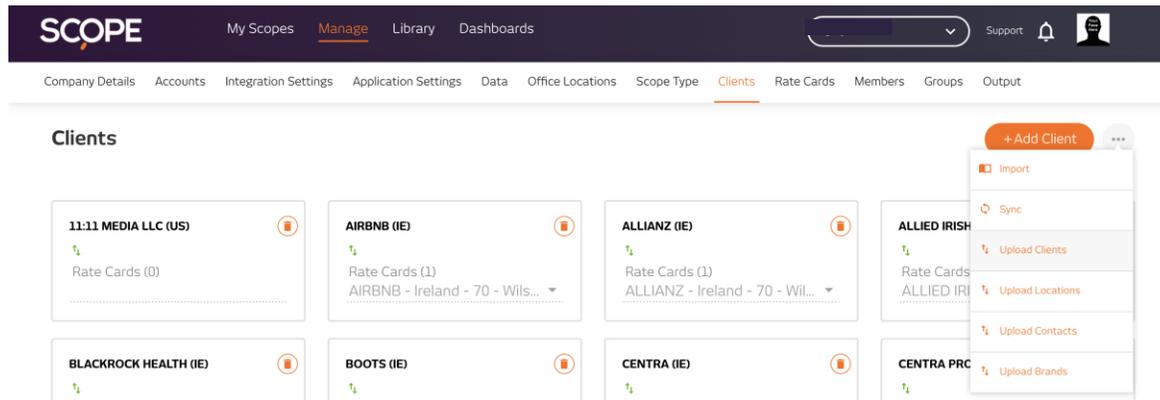
NOTE

Imported clients will appear after a short delay

Click 'Sync' to update client data for imported clients

2.2 Upload clients (1)

- Upload clients directly into Scope from our Excel template

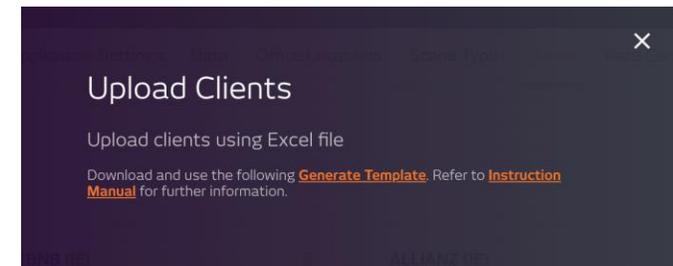


Click:

- Manage > Rate cards > (...) and click 'Upload Clients'

See client uploader pop up

- Click 'Generate Template' to download the excel template
- Populate your excel template with your client data



Upload Excel file

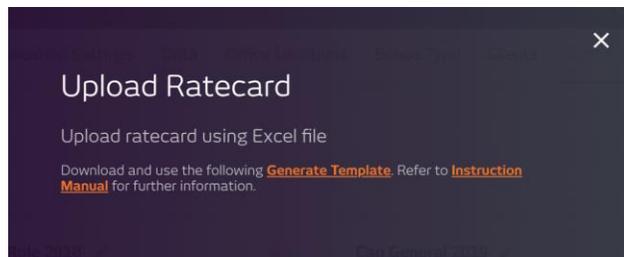


Browse

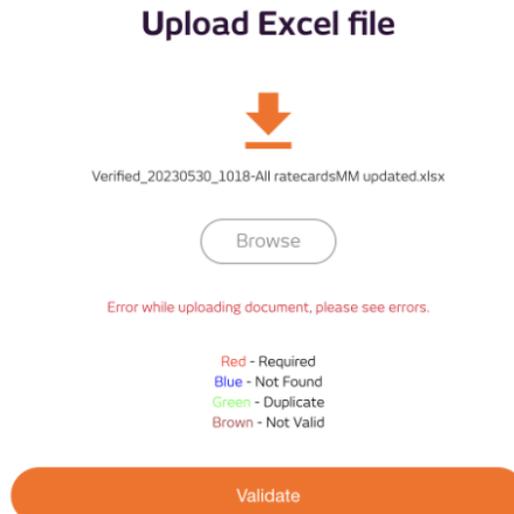
Validate

2.2 Upload client (2)

- Once your file is ready for upload click 'Browse'
 - Choose the file you wish to upload
 - Click 'Validate' - wait for the file to be validated and then click 'upload'



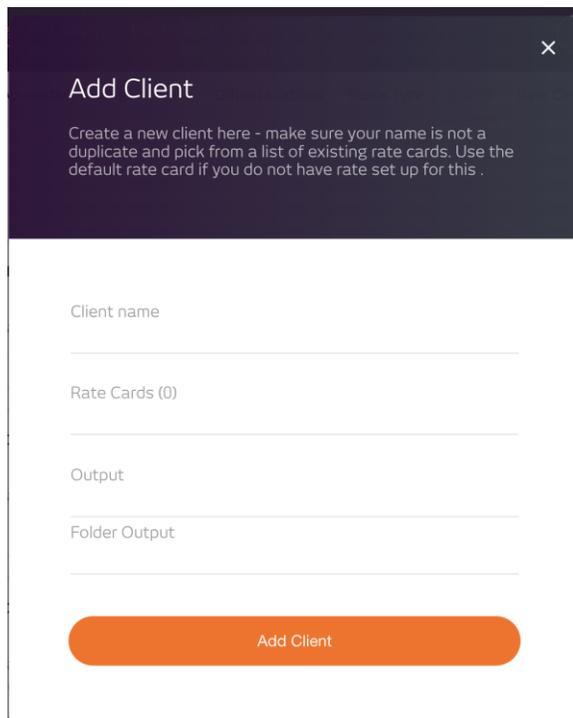
In the case of any invalid or missing data in the upload file, you will see the option to download the validated excel file.



- Click the arrow icon to download
- See any errors with the uploaded file highlighted according to the colour code (left)

2.3 Create clients manually

- To create a ratecard manually go to manage > clients > + Add Client



The screenshot shows a modal window titled "Add Client" with a close button (X) in the top right corner. Below the title is a dark header bar with the text "Add Client" and a close button. Below the header is a dark grey box containing the following text: "Create a new client here - make sure your name is not a duplicate and pick from a list of existing rate cards. Use the default rate card if you do not have rate set up for this .". Below this box are four input fields: "Client name", "Rate Cards (0)", "Output", and "Folder Output". At the bottom of the form is a large orange button labeled "Add Client".

- Add the client name
 - Select the ratecard(s) you want to associate with the client
 - Select any default outputs you want for that client

2.3 Assign brands to a client

- To assign a brand to a client go to manage > clients
 - Select the client you want to add brands to
 - Scroll to the brand section on the client page
 - Click '+ Brand'
 - Enter brand details
 - Select rate card you wish to associate with the brand
 - **NOTE** – you can only select from rate cards associated with the higher-level client

Brands

+ Add Brand

Add Brand

Enter the details of your brand

Brand name

Ratecards

ScopeMark Ratecard - GBP (GBP)

Location

Not selected

Key Contact

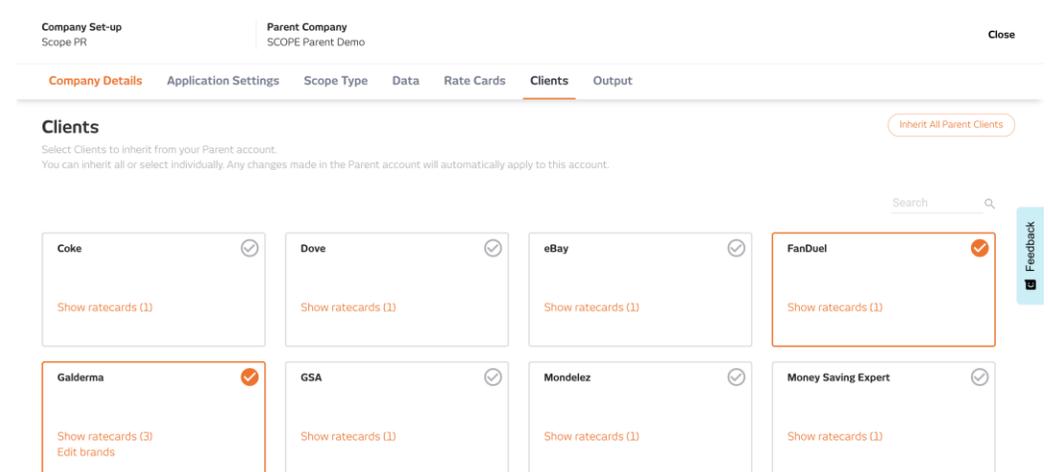
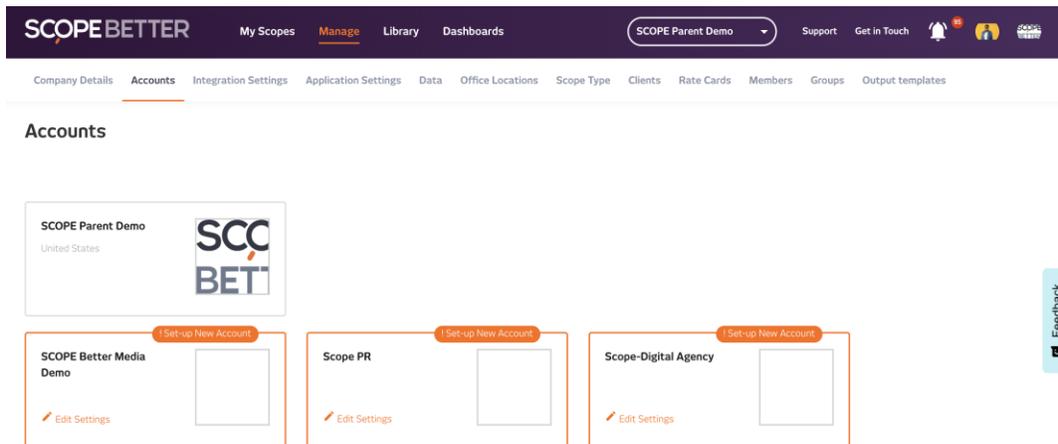
No available contacts

Scope Template

Add Brand

2.4 Sharing clients to child accounts

- To share a client from parent to child go to manage > accounts
 - Select the child account you would like to share the rate card to
 - Click 'edit settings'



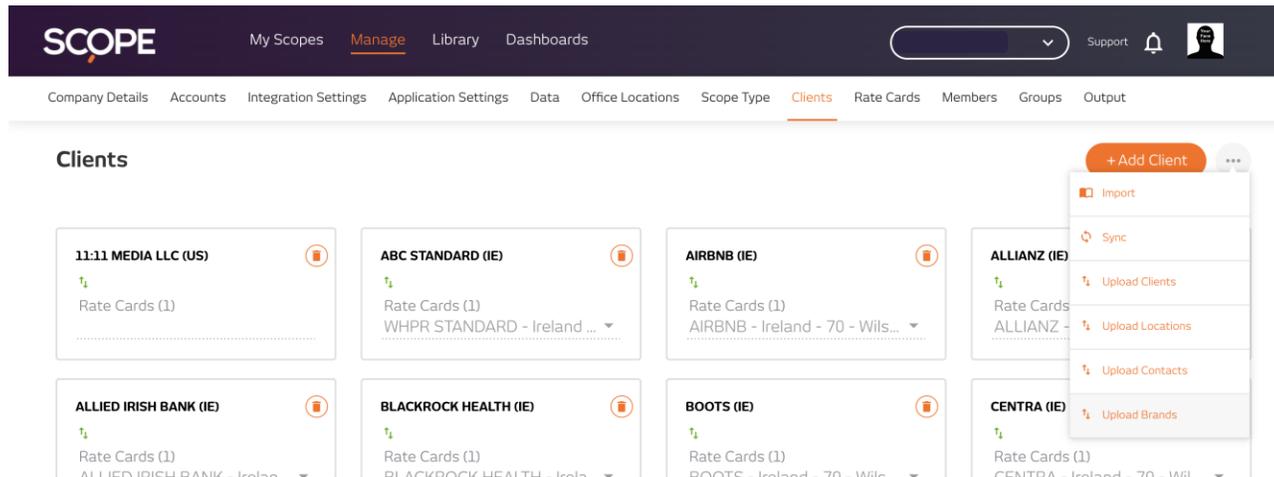
- Click the 'client' tab and select the client you want to share with the child account
 - Any clients with a tick and orange border will be inherited by the child account
 - NOTE - Any edits to clients in the parent account will be inherited by the child account automatically
 - NOTE - Any new client created by the parent will need to be selected and shared to the child account

Brands

1. Upload brands
2. Create brands manually
 - Assign rate card to a brand
 - Assign brands to a client
3. Sharing brands to child accounts

3.1 Upload brands (1)

- Upload brands directly into Scope from our Excel template

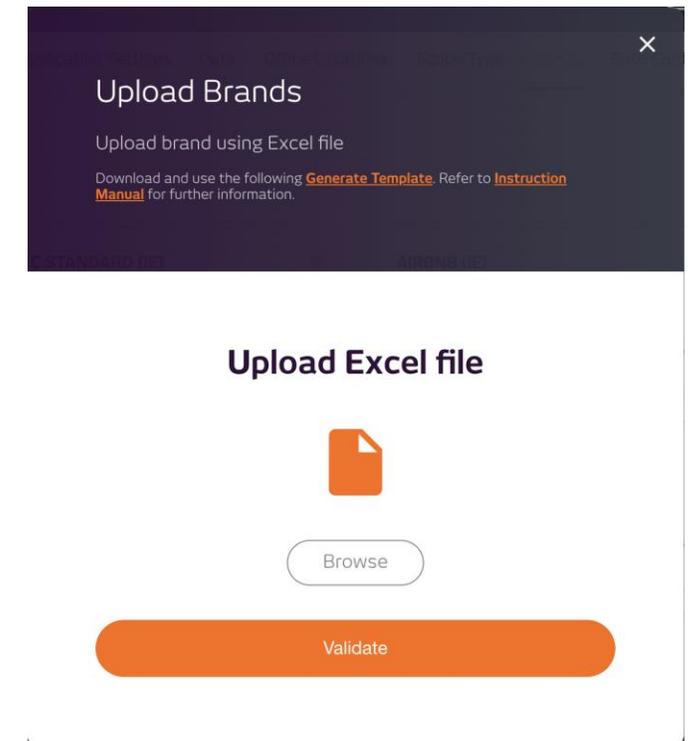


Click:

- Manage > Rate cards > (...) and click 'Upload Brands'

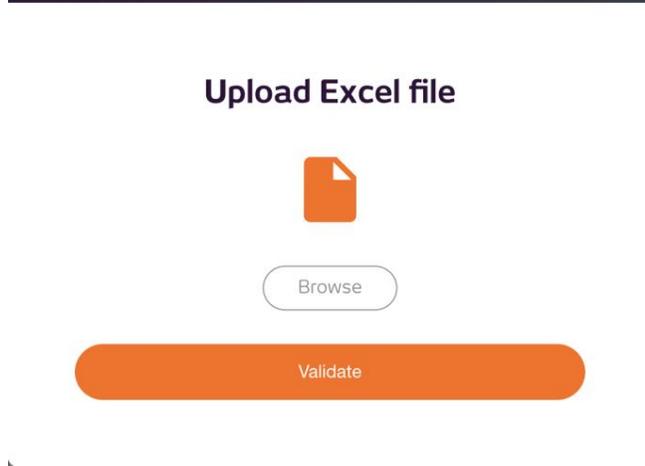
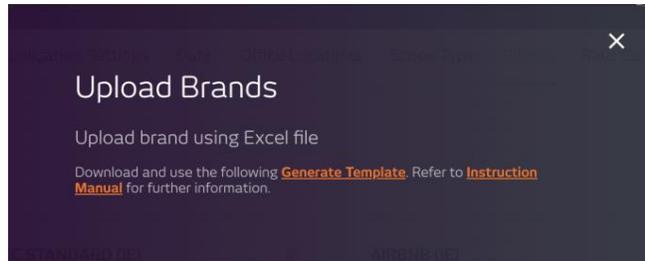
See client uploader pop up

- Click 'Generate Template' to download the excel template
- Populate your excel template with your client data

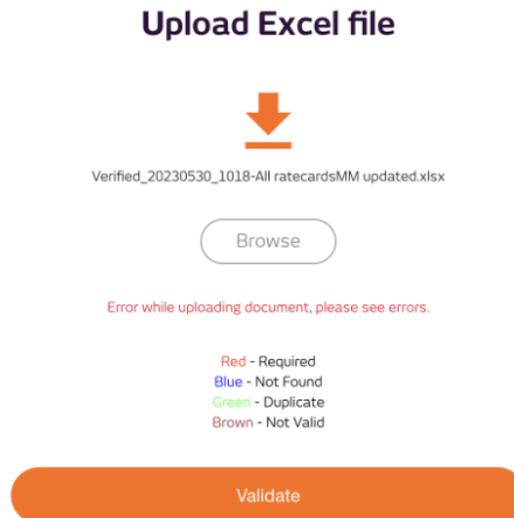


3.1 Upload brands (2)

- Once your file is ready for upload click 'Browse'
 - Choose the file you wish to upload
 - Click 'Validate' - wait for the file to be validated and then click 'upload'



In the case of any invalid or missing data in the upload file, you will see the option to download the validated excel file.



- Click the arrow icon to download
- See any errors with the uploaded file highlighted according to the colour code (left)

3.2 Create a brands manually

- All brands sit within a client
- To create a brand to a client go to manage > clients
 - Select the client you want to add the brand to
 - Scroll to the brand section on the client page
 - Click '+ Brand'
 - Enter brand details
 - Select rate card you wish to associate with the brand
 - **NOTE** – you can only select from rate cards associated with the higher-level client

Brands

+ Add Brand

Add Brand

Enter the details of your brand

Brand name

Ratecards
ScopeMark Ratecard - GBP (GBP) ▼

Location
Not selected ▼

Key Contact
No available contacts ▼

Scope Template

Add Brand

3.3 Sharing brands to child accounts

- To share a brand from parent to child go to manage > accounts
 - Select the child account you would like to share the brands to
 - Click 'edit settings'

The screenshot shows the 'Clients' management page for a parent company. The page title is 'Company Set-up' and 'Parent Company SCOPE Parent Demo'. The navigation bar includes 'Company Details', 'Application Settings', 'Scope Type', 'Data', 'Rate Cards', 'Clients', and 'Output'. The 'Clients' tab is active, and there is a button to 'Inherit All Parent Clients'. Below the header, there is a search bar and a grid of client cards. Each card has a checkmark in the top right corner and a 'Show ratecards' link. The 'Galderma' card is highlighted with an orange border and has an 'Edit brands' link below the 'Show ratecards' link. Other clients shown include Coke, Dove, eBay, FanDuel, GSA, Mondelez, and Money Saving Expert.

The screenshot shows the 'Brands' management page for the Galderma client. The page title is 'Company Set-up' and 'Parent Company SCOPE Parent Demo'. The navigation bar includes 'Company Details', 'Application Settings', 'Scope Type', 'Data', 'Rate Cards', 'Clients', and 'Output'. The 'Brands' tab is active, and there is a button to 'Inherit All Parent Brands'. Below the header, there is a search bar and a grid of brand cards. The 'Brand A' card is highlighted with an orange border and has a checkmark in the top right corner. Below the brand name, there is a 'Rate Cards' link and a dropdown menu showing 'PR US-STAN2023 (US...)'.

- Click the 'client' tab and select the client you want to share with the child account
- Click 'edit brands'
 - Select the brands you want the client account to inherit

Scope Type

1. Create Scope types
2. Sharing Scope types to child accounts

4.1 Creating Scope types

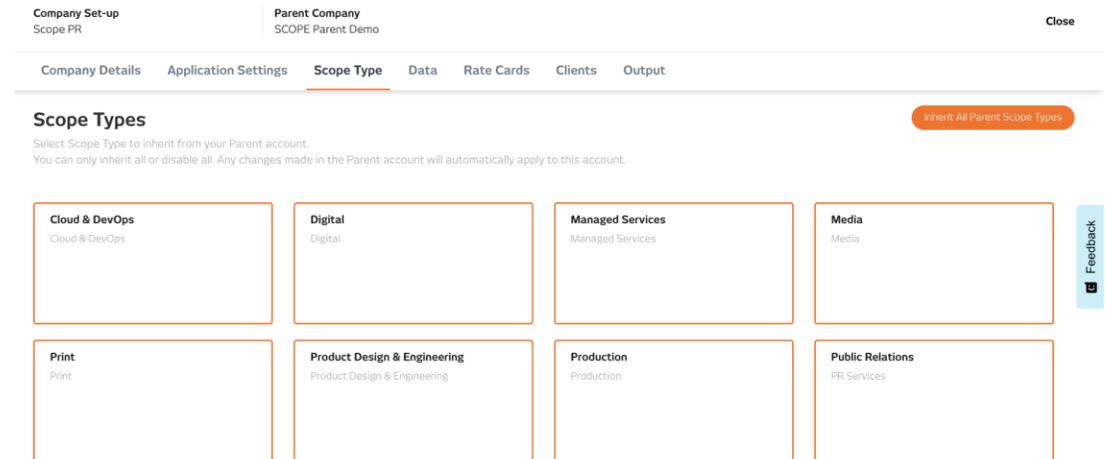
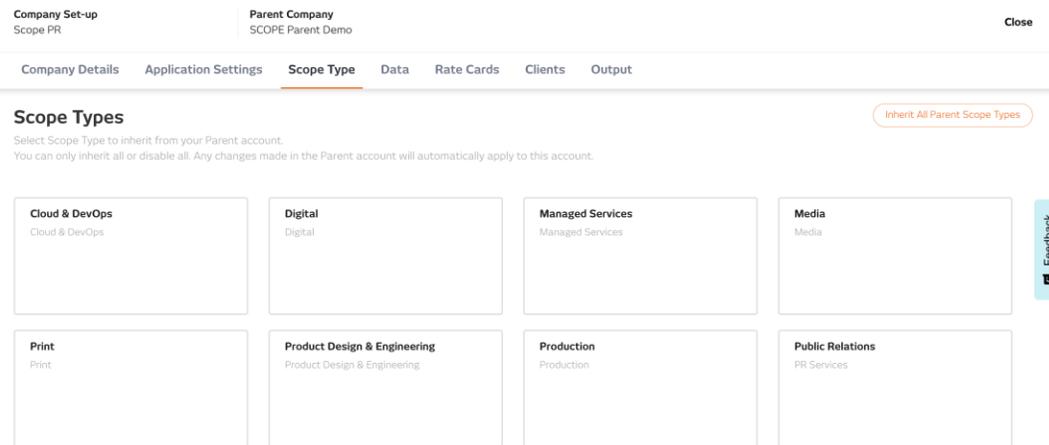
- Scope types let you label Scopes with pre-set categories
 - This supports reporting and scoping metrics
- To create a Scope type go to Manage > Scope Types
 - Click 'Add New Scope Type'
 - Add a Scope type name (eg. Digital) and add a description

The screenshot shows the SCOPE application interface. The top navigation bar includes 'SCOPE', 'My Scopes', 'Manage' (highlighted), 'Library', 'Dashboards', and 'System Admin'. A 'Support' button with a notification icon is also present. Below the navigation bar, a secondary menu includes 'Company Details', 'Integration Settings', 'Application Settings', 'Data', 'Office Locations', 'Scope Type' (highlighted), 'Clients', 'Rate Cards', 'Members', 'Groups', and 'Output'. The main content area is titled 'Scope Type' and features a '+ Add Scope Type' button. Two existing scope types are displayed: 'DTC' and 'HCP', each with a trash icon.

The 'Create Scope Type' modal form is shown. It has a title bar with a close button (X). The main area contains two input fields: 'Name' and 'Description'. A 'Create' button is located at the bottom of the form.

4.2 Sharing scope types to child accounts

- To share a scope type from parent to child go to manage > accounts
 - Select the child account you would like to share the scope type to
 - Click 'edit settings' and navigate to the 'Scope Type' tab



- **NOTE** – you can only share all Scope types to child accounts
- Click 'Inherit All Parent Scope Types' to share / unshare scope types
 - When Scope Types are being shared they will be bordered in orange and the button will be orange

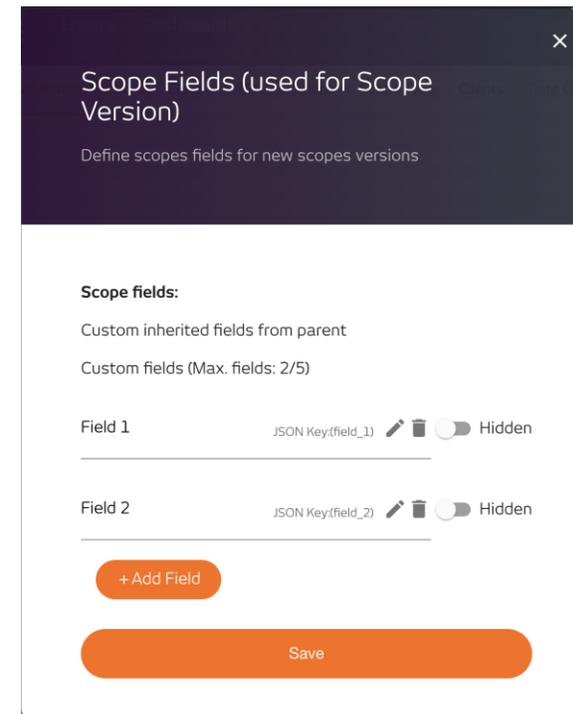
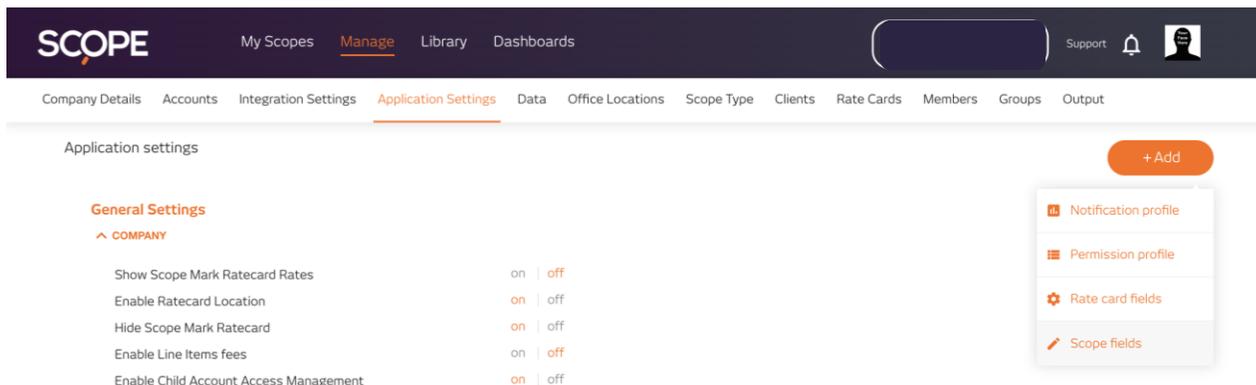


Custom Fields

1. Create Scope custom fields
2. Create rate card custom fields
3. Share custom fields to child accounts

5.1 Creating Scope custom fields

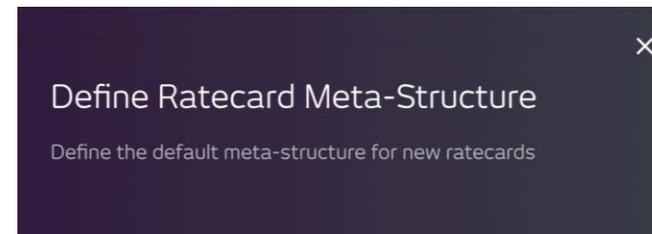
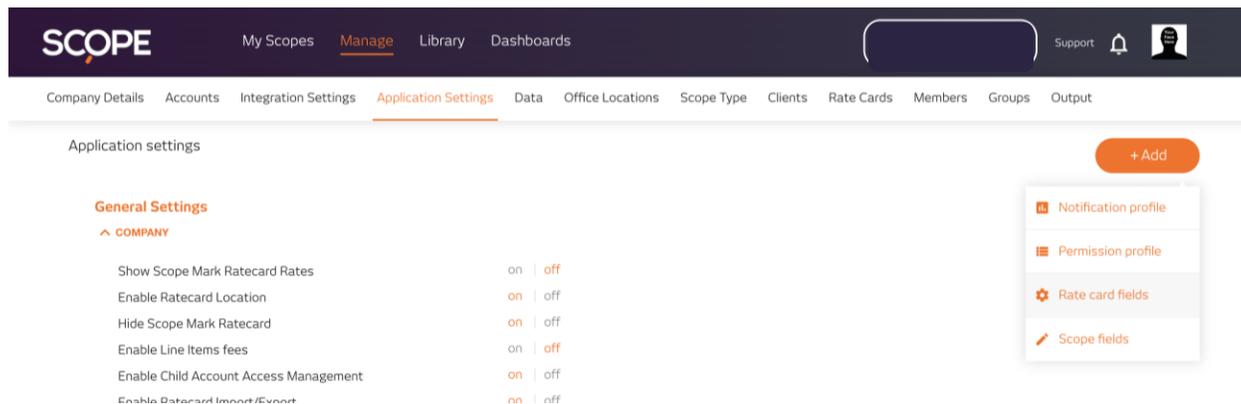
- Custom fields can be created on the Scope level or the rate card level
- You can add up to 5 custom fields on the scope level
- To create custom fields go to manage > application settings
 - Click +Add and Select 'Scope Fields'
 - Name the fields you want to add and click save



NOTE – these fields will appear when you are creating a Scope

5.2 Creating rate card custom fields

- Custom fields can be created on the Scope level or the rate card level
- You can add up to 3 custom fields on the scope level
- To create custom fields go to manage > application settings
 - Click +Add and Select 'Rate card fields'
 - Name the fields you want to add and click save



Ratecard Role Meta-structure:

Additional fields (Max. fields: 1/3)

Job Title

+ Add Field

Save

NOTE – these fields will appear when you are creating / editing a rate card

5.3 Sharing custom fields to child accounts

- To share a custom field from parent to child go to manage > accounts
 - Select the child account you would like to share the custom field to
 - Click 'edit settings' and navigate to the 'Application settings' tab
 - To share scope fields click the Scope custom fields section
 - To share rate card fields click the ratecard custom fields section

- **NOTE** – you can only share all custom fields to child accounts
- Click 'Inherit All Parent Fields' to share / unshare custom fields
 - When custom fields are being shared they will be bordered in orange and the button will be orange

The screenshot shows the 'Parent Company' settings page. The 'Application Settings' tab is selected, and the 'Ratecard Custom Fields' section is active. A text input field with the value 'Job Title' is highlighted with an orange border. In the top right corner, there is an orange button labeled 'Inherit All Parent Fields'. The left sidebar shows 'Application settings' with 'Ratecard Custom Fields' selected. The top navigation bar includes 'Company Set-up', 'Parent Company', and 'Close'. The main navigation bar includes 'Company Details', 'Application Settings', 'Scope Type', 'Data', 'Rate Cards', 'Clients', and 'Output'.

Output Templates

1. Managing output templates
3. Share output templates to child accounts

6.1 Managing output templates

- Output templates can be assigned to scopes and can be in document or spreadsheet form
 - To manage your existing templates go to 'Manage' and 'Output'
 - Here you can see word templates and excel templates
 - You can click to view the templates and edit them
 - Or select 'Add Template' to create a new template

The screenshot shows the 'SCOPEBETTER' web application interface. The top navigation bar includes 'My Scopes', 'Manage' (highlighted), 'Library', and 'Dashboards'. A dropdown menu is open for 'SCOPE Parent Demo'. The main navigation bar lists various settings and sections, with 'Output templates' selected. Below the navigation, there is a descriptive paragraph about creating and editing Word and Excel templates, followed by an 'Add Template' button. The main content area is divided into 'Document templates (10)' and 'Spreadsheet templates (3)'. A grid of ten template cards is displayed, each with a 'BLANK TEMPLATE' icon and a title: 'Default Folder Template' (Folder), 'Scope Output Template' (Scope), 'Custom SOW Template' (Scope), 'Example PS MSA' (Scope), 'Example SOW Tech' (Scope), 'Master Templated SOW content...' (Scope), 'MSA Template' (Scope), 'Red Letter SOW' (Scope), 'SCOPE Media MSA' (Scope), and 'Track and Trade example/Change...' (Scope).

6.2 Sharing output templates to child accounts

- To share an output template from parent to child go to manage > accounts
 - Select the child account you would like to share the output template to
 - Click 'edit settings' and navigate to the 'Output' tab
 - Select the output template you would like to share
 - Or select 'share all'
 - Or search & select the template
- **NOTE** – you can only share word document templates from parent to child (you cannot share excel templates)
- Outputs outlined in orange are shared from parent to child

Company Set-up
Scope PR

Parent Company
SCOPE Parent Demo

Company Details Application Settings Scope Type Data Rate Cards Clients **Output**

Output

Select output templates to share from your Parent account.
You can share all or select individually. Any changes made in the child account will automatically apply to this account.

Share All / Unshare All

Search

Custom SOW Template <input checked="" type="checkbox"/>	Default Folder Template <input checked="" type="checkbox"/>	Example PS MSA <input checked="" type="checkbox"/>	Example SOW Tech <input checked="" type="checkbox"/>
Master Templated SOW content block options <input checked="" type="checkbox"/>	MSA Template <input checked="" type="checkbox"/>	Red Letter SOW <input checked="" type="checkbox"/>	SCOPE Media MSA <input checked="" type="checkbox"/>
Scope Output Template <input checked="" type="checkbox"/>	Track and Trade example/Change order <input checked="" type="checkbox"/>		



Application Settings

1. Managing Application settings for Child Accounts

7.1 Application Settings

- Application settings need to be set on the child account
 - Parent users can use the account switcher to select the child account they want to edit
- On the child account go to manage > application settings
 - Edit the settings you wish to change for that account accordingly
 - **NOTE** – the application settings page is also where you can create permission profiles

The screenshot displays the 'SCOPE BETTER' application interface. The top navigation bar includes the logo and menu items: 'My Scopes', 'Manage' (highlighted), 'Library', and 'Dashboards'. A dropdown menu for 'Scope PR' is visible. Below the navigation bar, a secondary menu lists various settings categories, with 'Application Settings' currently selected. The main content area is titled 'Application settings' and features a '+ Add' button. Underneath, the 'General Settings' section is expanded, showing a list of settings for the selected 'SCOPE' account. Each setting has a label and a toggle switch (on/off).

Setting	On	Off
Show Scope date	on	off
Enable Client Approval Scope Status	on	off
Show price in Components panel	on	off
Enable Fixed Cost Deliverable and Component Editing	on	off
Show Scope Details	on	off
Display ScopeMark TPCs	on	off
Display ScopeMark Disciplines	on	off



Managing Members

1. Member Page
2. Inviting / Deactivating members
3. Member Access Level & permission profiles

8.1 Member Page

- The member page is where you view and manage members belonging to an account
 - To manage members for a child account, use the account switcher to pick the account
 - Go to Manage > Members
- Here you can see a list of the members who have access to the account
 - **NOTE** – the parent account and each specific child account have different members pages

The screenshot shows the SCOPE web application interface. At the top, there is a dark navigation bar with the SCOPE logo on the left, navigation links for 'My Scopes', 'Manage' (highlighted), 'Library', and 'Dashboards' in the center, and a dropdown menu for 'McCore (Demo)' along with 'Support', a notification bell, and a profile icon on the right. Below this is a secondary navigation bar with links for 'Company Details', 'Accounts', 'Integration Settings', 'Application Settings', 'Data', 'Office Locations', 'Scope Type', 'Clients', 'Rate Cards', 'Members' (highlighted), 'Groups', and 'Output'. The main content area is titled 'Members' and features a '+ Add Member' button. A filter section shows 'Filters: Show deactivated user'. Below this is a table with the following columns: MEMBER, ACCESS LEVEL, PERMISSION PROFILE, NOTIFICATION PROFILE, CLIENTS, GROUPS, and ACTIVITY. The table contains four rows of member data.

MEMBER	ACCESS LEVEL	PERMISSION PROFILE	NOTIFICATION PROFILE	CLIENTS	GROUPS	ACTIVITY
Charlotte Mason	Administrator	User Defined	User Defined	9	1	07/27/21
Karen Mason	Administrator	Master	Developer	9	1	07/27/20
Ayan Shukatayev	User	User Defined	User Defined	9	0	04/15/20
Jake Smith	User	User Defined	User Defined	9	1	06/04/20

8.2 Inviting / Deactivating Members

- To invite a member go to Manage > Members and click 'Add Member'
 - Insert the email and select the access level and permission profile
 - The user will receive an email and link to complete sign up

- To deactivate a member, find the member and click '...'
 - Select 'deactivate' and confirm you want to deactivate the user
 - This means the user will no longer be able to log in to Scope

	Karen Mason	Administrator	Master	Developer	9	1	07/27/20	
	Ayan Shukatayev	User	User Defined	User Defined	9	0	04/15/20	
	Jake Smith	User	User Defined	User Defined	9	1	08/04/20	

×

Add a Member

Invite a new member here and set their access level - They will receive an email to sign up to Scope

Email
This is required!

Access level
User

Permission profile
This is required!

Confirm

8.3 Permission Profiles

- Each member has an access level they are assigned upon invitation
 - Administrator – this gives full access to Scope
 - User – this allows the user to draft scopes, it does not allow the user to administer settings or data
- These permissions can be customized in the Permission profile page
 - Go to Manage > Application Settings and click 'Add'
 - Select Permission profiles
 - Here you can edit the permissions for Administrator and User
 - You can also add / edit new permission profiles
 - Click 'Add Profile' and set a name & access level (which can then be customised)

