Onboarding

Getting Started · https://scopematch.com/docs/onboarding/

Create an Account

To access the platform, the first step is to create a user account. This is required even if you've received an invitation from another user outside the platform.

To create your account:

1. Create a ScopeMatch Account or click "Sign up now" at app.scopematch.com
2. Verify your email address using the code sent to your inbox.
3. Enter your information and company name as prompted.
4. Review and accept the **Terms of Service** to complete the registration.

Note: The verification email might be delivered to your **junk** or **spam** folder. Please check these folders if you don't see the email in your inbox.

Company Association

After entering your information, ScopeMatch will search for existing companies with similar names. You will then be presented with three possible paths:

A. Claim an Existing Company

If you see your company listed and no one has claimed it yet:

- Click on your **company name**.
- You will be directed into the **Onboarding flow** to complete the setup as the company's first admin.

Note: Even if your company profile exists in the platform, you still need to create a user account.

B. Join an Existing Company

If your company has already been claimed by a colleague:

- Select the correct company from the list.
- The **admin of your company profile** will be notified of your request.
  - They can approve it via the **Notifications** page (click the three-dot menu in the top-right corner).
- Once approved, you'll gain access to the company profile.
  - You **will not** go through the full onboarding flow in this case.

C. Create a New Company

If no relevant matches are found:

- You'll be prompted to **create a new company**.
- If similar company names appear but none belong to you, scroll to the **bottom of the page** and click **"Create New Company"**.

Onboarding Flow

Once you've claimed or created a company, you will be guided through the onboarding process:

1. **Select your company type** from the available options.
2. **Enter your head office location**:
   - Start typing the **city name**, and choose from the dropdown list.
   - Include **region** and **country** as prompted.
3. **Provide a contact information**.
4. Click **Enter** to complete the onboarding.