

# SCOPEBetter Salesforce connector

## Installation guide

SCOPEBETTER

# Setup steps

1.

## Install SCOPEBetter connector

Follow the instructions on Salesforce marketplace to download the connector and install in your sandbox/account

2.

## Connect to your SCOPEBetter account

Obtain the API credentials on your SCOPEBetter account and apply them in Salesforce

3.

## Add SCOPE to the Opportunity page

Add a SCOPE tab to create, link and track the scopes within opportunities

4.

## Test your new connection

Create a scope from Salesforce and continue working on it in SCOPEBetter. Observe the changes to your scopes' status, margin and revenue are synced to Salesforce

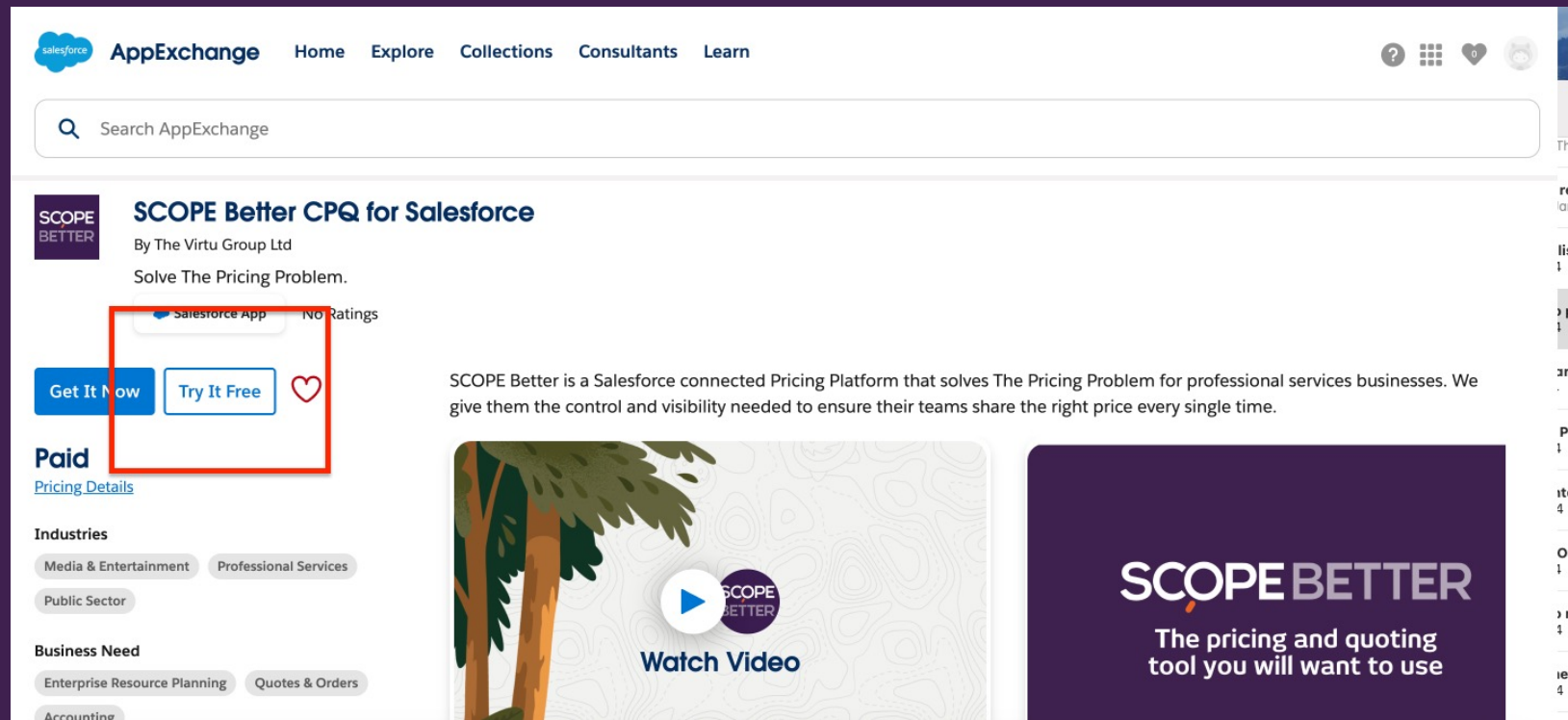
# Install a connector

---



SCOPEBETTER


# Download the app from Salesforce Marketplace

- Link



# Follow the installation prompts

 AppExchange





## All set! The solution is ready to install.

<b>Package</b>	<b>Version</b>
Scope Better (1.6 / 1.6.0)	1.6 / 1.6.0
<b>Duration</b>	<b>Number of Subscribers</b>
Does Not Expire	Site-Wide

To start the installation, log in to your sandbox. After the installation finishes, the solution is ready to explore.

[Log In & Install](#)

**SCOPE Better CPQ for Salesforce**  
by The Virtu Group Ltd  
No Ratings



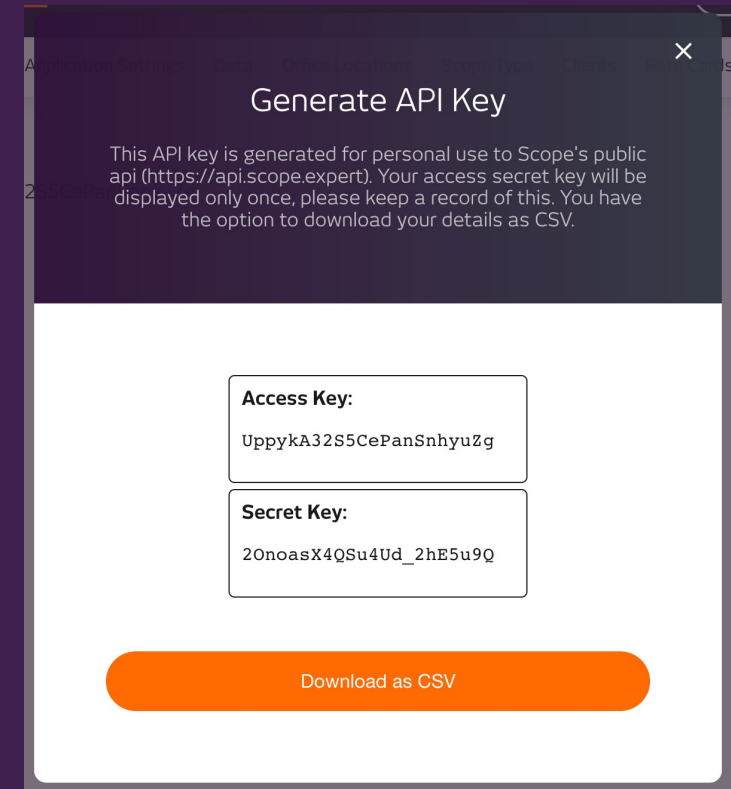
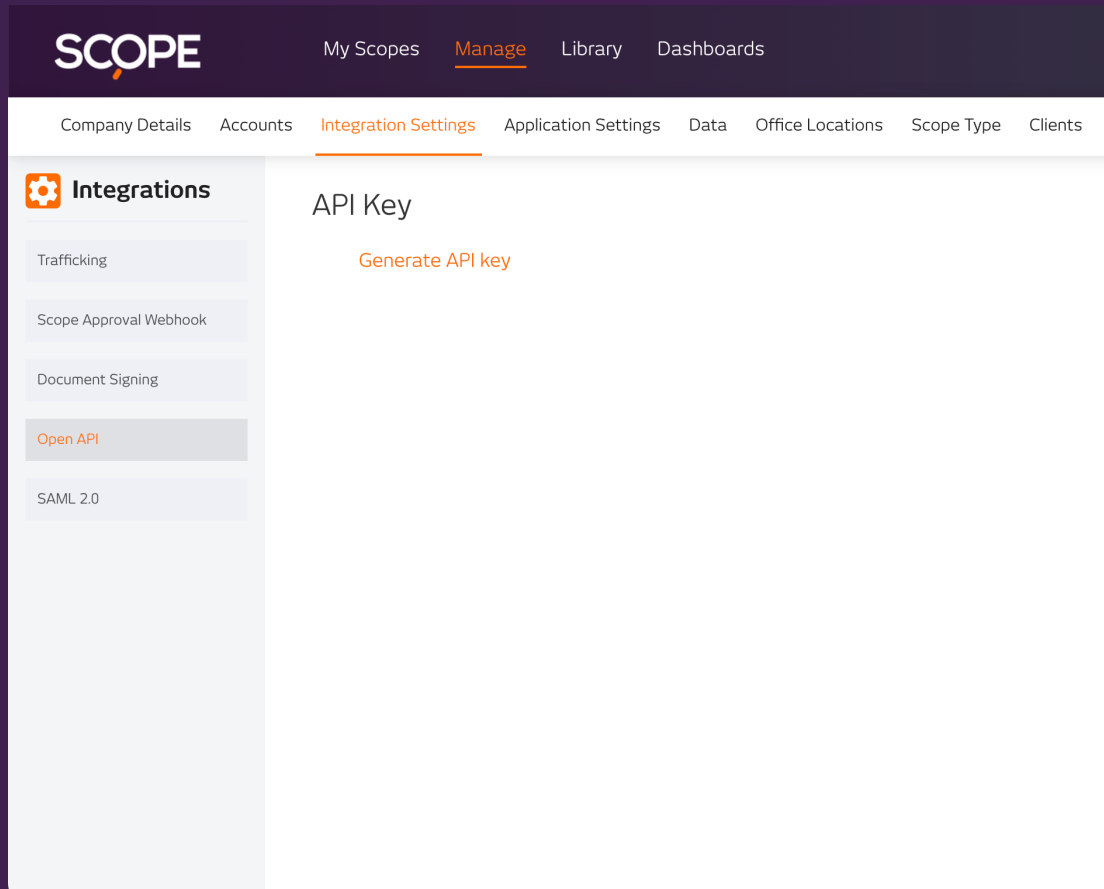
Salesforce isn't the provider of this listing but has conducted a limited [security review](#).

**Connect to your SCOPE account**

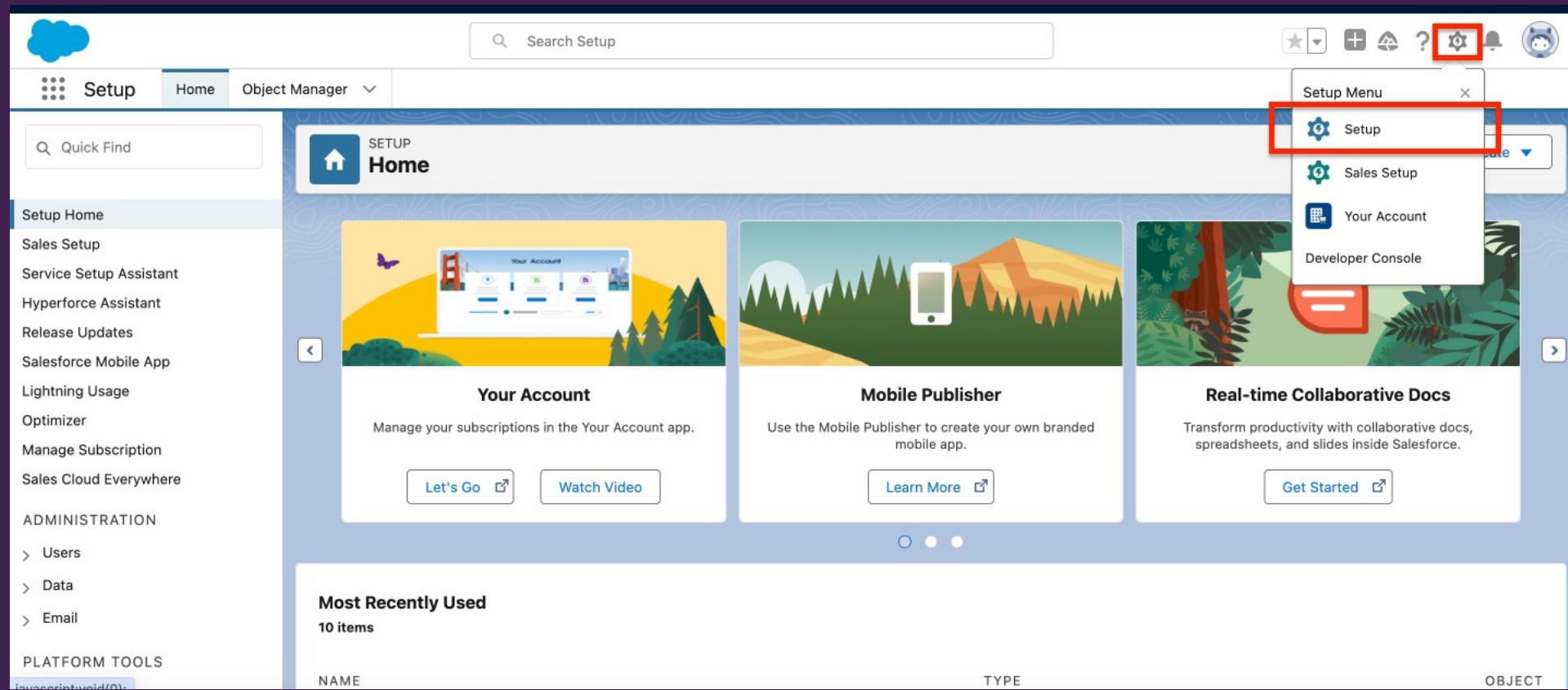
---

**SCOPE**BETTER

# Obtain API key and Secret Key



# Open "Setup"





# Search for "Named Credentials"

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". A search bar on the left contains the text "named cre", which is highlighted with a red box. Below this search bar, the "Named Credentials" link is highlighted with a red box and a red arrow points to it. The main content area displays the "Named Credentials" page, which includes a "New" button and a table with one item, "ScopeBetter".

Search Setup

Setup Home Object Manager

named cre

Security  
Named Credentials  
Named Credentials

Didn't find what you're looking for?  
Try using Global Search.

SETUP  
Named Credentials

Named Credentials External Credentials

1 Items · Sorted by Label

New

Label	Type	URL	External Credential	Actions
ScopeBetter	Legacy	https://api.scope.expert		

# Update Named Credentials

Setup

Home Object Manager

Search Setup

named cre

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

Save Cancel

Label ScopeBetter

Name ScopeBetter

URL https://api.scope.expert

Authentication

Certificate

Identity Type Named Principal

Authentication Protocol Password Authentication

Username QW-1xSiZRHGW-BUgF

Password .....

API Key

Secret Key

Callout Options

Generate Authorization Header

Allow Merge Fields in HTTP Header

**Edit Opportunity page**

---

**SCOPE**BETTER

# Find Opportunities page

The screenshot shows the Salesforce interface with the following elements and annotations:

- Annotation 1:** Points to the App Launcher icon (a 3x3 grid of dots) in the top-left corner.
- Annotation 2:** Points to the 'Sales' app in the App Launcher dropdown menu.
- Annotation 3:** Points to the 'Opportunities' tab in the top navigation bar.

The main content area displays three cards:

- Plan My Accounts:** Accounts owned by me. Shows 3 Accounts. Activity summary: 3 Upcoming Activity, 0 Past Activity, 0 No Activity. Button: View Accounts.
- Grow Relationships:** Contacts owned by me and created in the last 90 days. Shows 7 Contacts. Activity summary: 6 Upcoming Activity, 0 Past Activity, 1 No Activity. Button: View Contacts.

At the bottom, there are partial views of 'Build Pipeline', 'My Goals', and 'Today's Events' sections.

# In one of Opportunities – Edit Page

**Acme - 1,200 Widgets (Sample)**

Edit Delete Clone

**Contact Roles (3)**

- Howard Jones (Sam...)**  
Role: Decision Maker  
Title: Buyer
- Jennifer Stamos (Sa...)**  
Role: Economic Buyer  
Title: President and CEO
- Leanne Tomlin (Sam...)**  
Role: Business User  
Title: VP Customer Support

**Details History**

**Opportunity Information**

Account Name	<a href="#">Acme (Sample)</a>	Probability (%)	35%
Opportunity Owner	<a href="#">Karyna Silina</a>	Forecast Category	Pipeline
Opportunity Name	Acme - 1,200 Widgets (Sample)	Next Step	Need estimate
Amount	£110,000.00		
Close Date	31/12/2024		

**Setup Menu**

- Setup
- Sales Setup
- Your Account
- Developer Console
- Edit Page**
- Edit Object

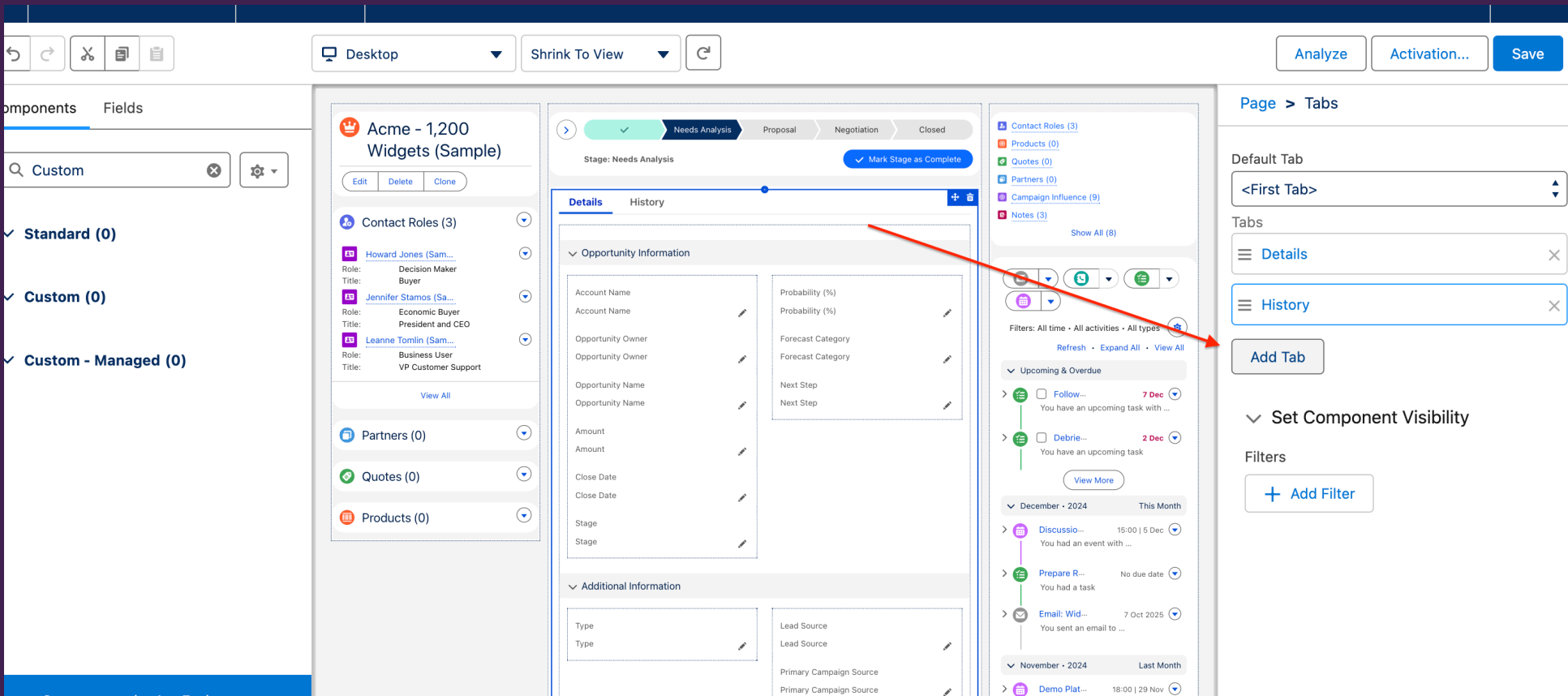
Filters: All time • All activities • All types

Refresh • Expand All • View

Upcoming & Overdue

Follow ... 7 Dec

# Add Tab



# Select "Custom" and name it "SCOPE"

The screenshot displays the Lightning App Builder interface for configuring a page titled "Opportunity Record Page - Three Column". The left sidebar shows the "Components" panel with a search bar containing "Custom". Under the "Custom" category, there are three items: "Standard (0)", "Custom (0)", and "Custom - Managed (0)". The main canvas shows a preview of the page layout, including a "Details" tab and a "History" tab. A red box highlights the "Details" tab label, with a red arrow pointing to it from the text "Find 'Custom' in the dropdown". The right sidebar shows the "Page > Tabs" configuration panel, which includes a "Default Tab" dropdown set to "<First Tab>", a list of tabs ("Details", "History", "Details"), and a "Set Component Visibility" section with a "Filters" button and an "Add Filter" button. The "Done" button is visible at the bottom right of the configuration panel.

Lightning App Builder | Pages | Opportunity Record Page - Three Column

Components | Fields

Search: Custom

Standard (0)

Custom (0)

Custom - Managed (0)

Acme - 1,200 Widgets (Sample)

Contact Roles (3)

Howard Jones (Sam...)

Role: Decision Maker

Title: Buyer

Jennifer Stamos (Sa...)

Role: Economic Buyer

Title: President and CEO

Leanne Tomlin (Sam...)

Role: Business User

Title: VP Customer Support

View All

Partners (0)

Quotes (0)

Products (0)

Details | History | Details

Stage: Needs Analysis

Mark Stage as Complete

Find "Custom" in the dropdown

Tab Label

Details

Set Component Visibility

Filters

+ Add Filter

Done

Page > Tabs

Default Tab

<First Tab>

Tabs

Details

History

Details

Add Tab

Set Component Visibility

Filters

+ Add Filter

Done

# Add "Related SCOPes" component to the new tab

The screenshot displays the Lightning App Builder interface for editing an 'Opportunity Record Page - Three Column'. The top navigation bar includes a back arrow, 'Lightning App Builder', 'Pages', and the page title. Below this is a toolbar with undo, redo, delete, copy, and paste icons, along with a 'Desktop' view selector and a 'Shrink To View' button. The main workspace is divided into three columns. The left column, titled 'Components', has a search bar with 'SCOPE' entered and a list of component categories: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (1)'. The 'Related SCOPes' component is highlighted in the 'Custom - Managed (1)' category. A red box around the search bar and the 'Related SCOPes' component is labeled 'Drag&drop into Tab'. The middle column shows a preview of the 'Acme - 1,200 Widgets (Sample)' record. It features a 'Details' tab, a 'History' tab, and a 'SCOPE' tab. A red arrow points from the 'Related SCOPes' component in the left column to the 'SCOPE' tab in the middle column. The right column shows a preview of the 'Opportunity Record' page, which includes a 'Page' section with fields for 'Label', 'API Name', and 'Page Type', and an 'Object' section with a field for 'Opportunity'. The 'Template' section shows 'Three Regions' and the 'Description' section is empty.

Lightning App Builder | Pages | Opportunity Record Page - Three Column

Desktop | Shrink To View

Components | Fields

SCOPE

Standard (0)

Custom (0)

Custom - Managed (1)

Related SCOPes

Drag&drop into Tab

Acme - 1,200 Widgets (Sample)

Contact Roles (3)

Howard Jones (Sam...)

Jennifer Stamos (Sa...)

Leanne Tomlin (Sam...)

Quotes (0)

Products (0)

Details | History | SCOPE

Stage: Needs Analysis

Mark Stage as Complete

Add Component(s) Here

Page

\* Label

Opportunity Record

\* API Name

Opportunity\_Record

\* Page Type

Record Page

Object

Opportunity

Template

Three Regions

Description




**Test your new connector**

---

**SCOPE**BETTER

# Stages eligible for creating scopes



Sales

Home

Leads

Accounts

Contacts

Opportunities

Calendar

Forecasts

Dashboards

Reports

Quotes

Search...

★

+

🏠

?

⚙️

🔔

🐙

New

Opportunities

👑

Recently Viewed

📌

6 items • Updated a few seconds ago

🔍

Search this list...

⚙️

📊

🔄

✎

📈

🔼

	<input type="checkbox"/> <div>Opportunity Name</div>	<div>Account Name</div>	<div>Stage</div>	<div>Close Date</div>	<div>Opportunity Own...</div>	
1	<input type="checkbox"/> <div>Acme - 1250 Widgets (Sample)</div>	Acme (Sample)	Qualification <span>✓</span>	09/12/2024	KSili	⌵
2	<input type="checkbox"/> <div>Acme - 1,200 Widgets (Sample)</div>	Acme (Sample)	Needs Analysis <span>✓</span>	31/12/2024	KSili	⌵
3	<input type="checkbox"/> <div>salesforce.com - 75 Widgets (Sample)</div>	salesforce.com (Sample)	Closed Won <span>✗</span>	13/11/2024	KSili	⌵
4	<input type="checkbox"/> <div>Global Media - 170 Widgets (Sample)</div>	Global Media (Sample)	Closed Won <span>✗</span>	14/11/2024	KSili	⌵
5	<input type="checkbox"/> <div>Global Media - 270 Widgets (Sample)</div>	Global Media (Sample)	Closed Won <span>✗</span>	06/11/2024	KSili	⌵
6	<input type="checkbox"/> <div>salesforce.com - 60 Widgets (Sample)</div>	salesforce.com (Sample)	Closed Won <span>✗</span>	29/10/2024	KSili	⌵

# Create a scope

- Scope(s) for the specified client and budgets is created
- New client is created in SCOPE if not found
- Status, revenue, margin are synced back from SCOPE

>

✓

Needs Analysis

Proposal

Negotiation

Closed

Stage: Needs Analysis

✓ Mark Stage as Complete

DetailsHistorySCOPE

Related SCOPES

Create ScopeLink ScopeRefresh

<input type="checkbox"/>	SCOPE ID ▾	Name ▾	Status ▾	Start	End	Budget ▾	R ▾	M ▾
<input type="checkbox"/>	20642	Acme - 1,200 Wi...	DRAFT	7 D...	31 ...	500	0	0
<input type="checkbox"/>	20535	Dummy	DRAFT	3 D...	3 M...	6000	324	209
<input type="checkbox"/>	20641	Acme - 1,200 Wi...	CLOSED	7 D...	31 ...	110000	3300	1185

# Add (Link) existing ScopeID to Opportunities

https://scope.expert/scopes/scope-overview/20642

SCOPEBETTER

My Scopes Manage Library Dashboards Support Get in Touch

Acme - 1,200 Widgets (Sample) **Draft** S-30

Created by: Karyna Silina Date created: 07/12/2024

Client: Acme (Sample) Rate Card: UK Standard Rate Card Version: 2 Scope Type: No Type Language: EN Version: 1

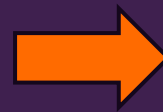
Scope Activity Details Team Breakdown Output Editor

Table Timeline Search Show Filters Create new

ITEM NAME	Quantity	Last edited	Profit	Agency hours	Agency price
Drag & Drop Deliverables between sections or from this default section					
SCOPE FEE	Amount		Price		
Scope Margin			-		£0.00
Scope Totals			£0.00	0 hrs	£0.00

Submit

Output



> ✓ Needs Analysis Proposal Negotiation Closed

Stage: Needs Analysis Mark Stage as Complete

Details History SCOPE

Related SCOPES Create Scope Link Scope Refresh

	S	N	S	Start	End	B	R	M	Cre...	Up...	S	S	Sol...
	20...	Ac...	DR...	7 D...	31...	500	0	0	7 D...	7 D...	No		