

SCOPEBetter Salesforce connector Installation guide

SCOPEBETTER

Setup steps



Install SCOPEBetter connector

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

Connect to your SCOPEBetter account

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

Add SCOPES to the Opportunity page

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

Test your new connection

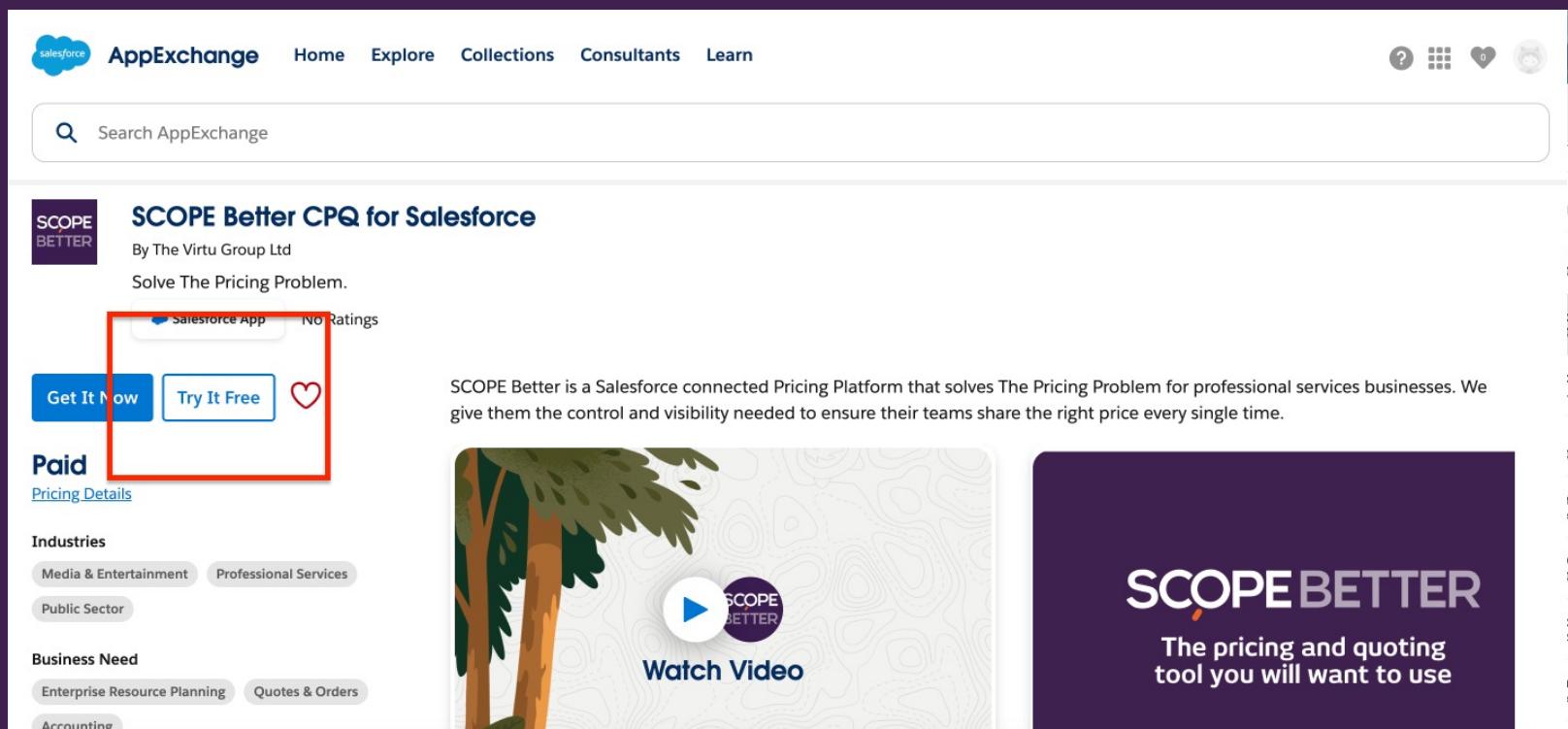
Create a scope from Salesforce and continue working on it in SCOPEBetter. Observe the changes to your scopes' status, margin and revenue are synced to Salesforce

Install a connector

SCOPE BETTER

Download the app from Salesforce Marketplace

- Link



Follow the installation prompts

 **AppExchange**



All set! The solution is ready to install.

Package	Version
Scope Better (1.6 /1.6.0)	1.6 /1.6.0
Duration	Number of Subscribers
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

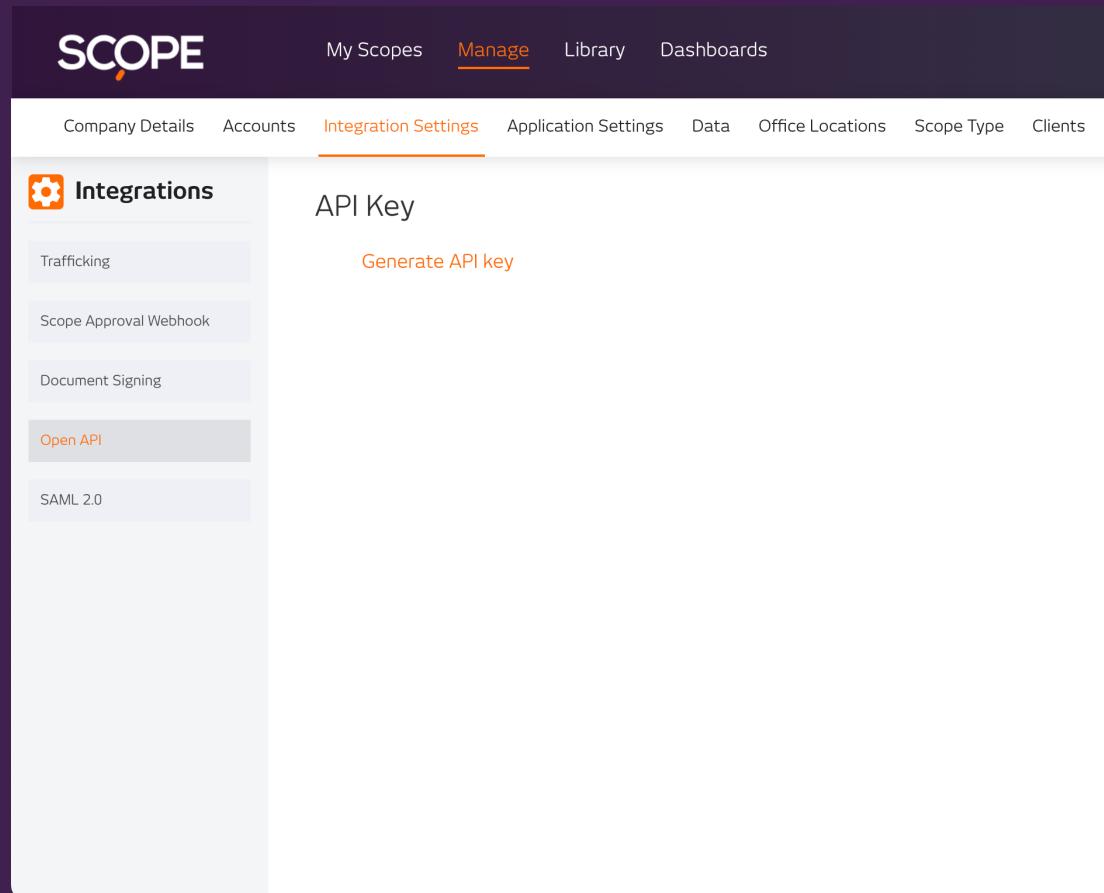


Salesforce isn't the provider of this listing but has conducted a limited [security review](#).

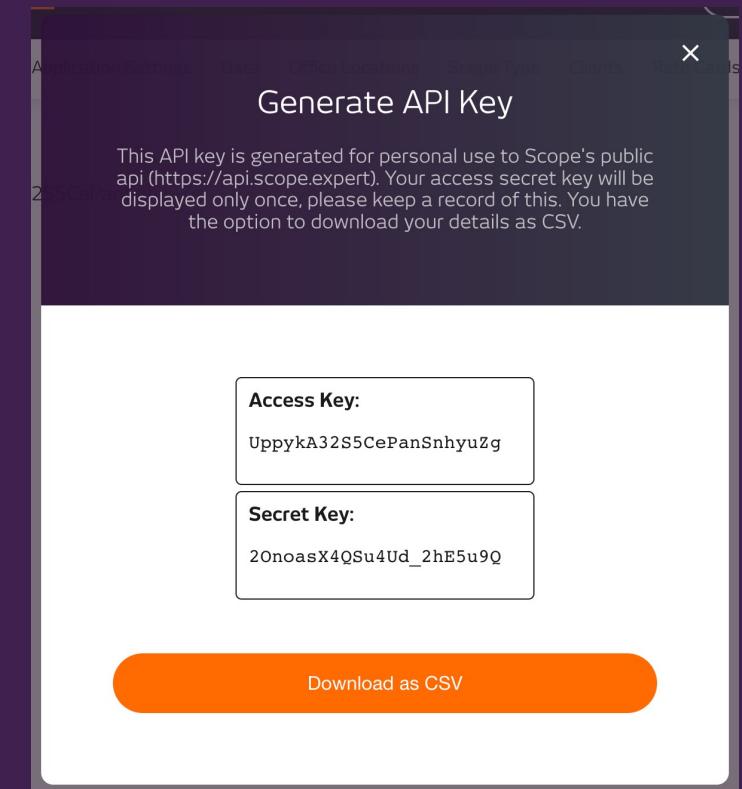
Connect to your SCOPE account

SCOPE BETTER

Obtain API key and Secret Key

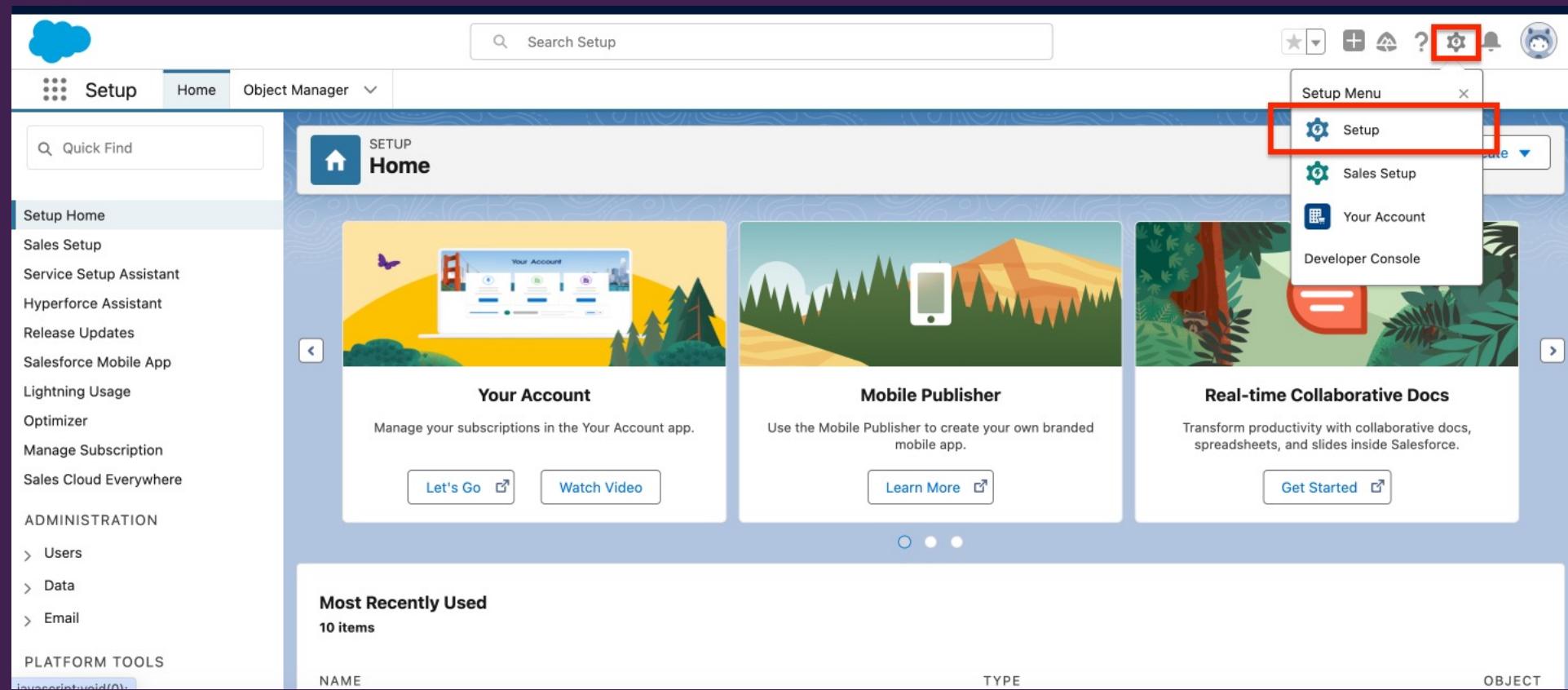


The screenshot shows the SCOPE web interface. The top navigation bar includes 'My Scopes', 'Manage' (which is underlined in orange), 'Library', and 'Dashboards'. Below this, a secondary navigation bar includes 'Company Details', 'Accounts', 'Integration Settings' (underlined in orange), 'Application Settings', 'Data', 'Office Locations', 'Scope Type', 'Clients', and 'Rate Limits'. On the left, a sidebar titled 'Integrations' lists 'Trafficking', 'Scope Approval Webhook', 'Document Signing', 'Open API' (which is highlighted with a grey box), and 'SAML 2.0'. The main content area is titled 'API Key' and contains a 'Generate API key' button. A large orange arrow points from the 'Open API' section of the sidebar to the 'Generate API key' button.

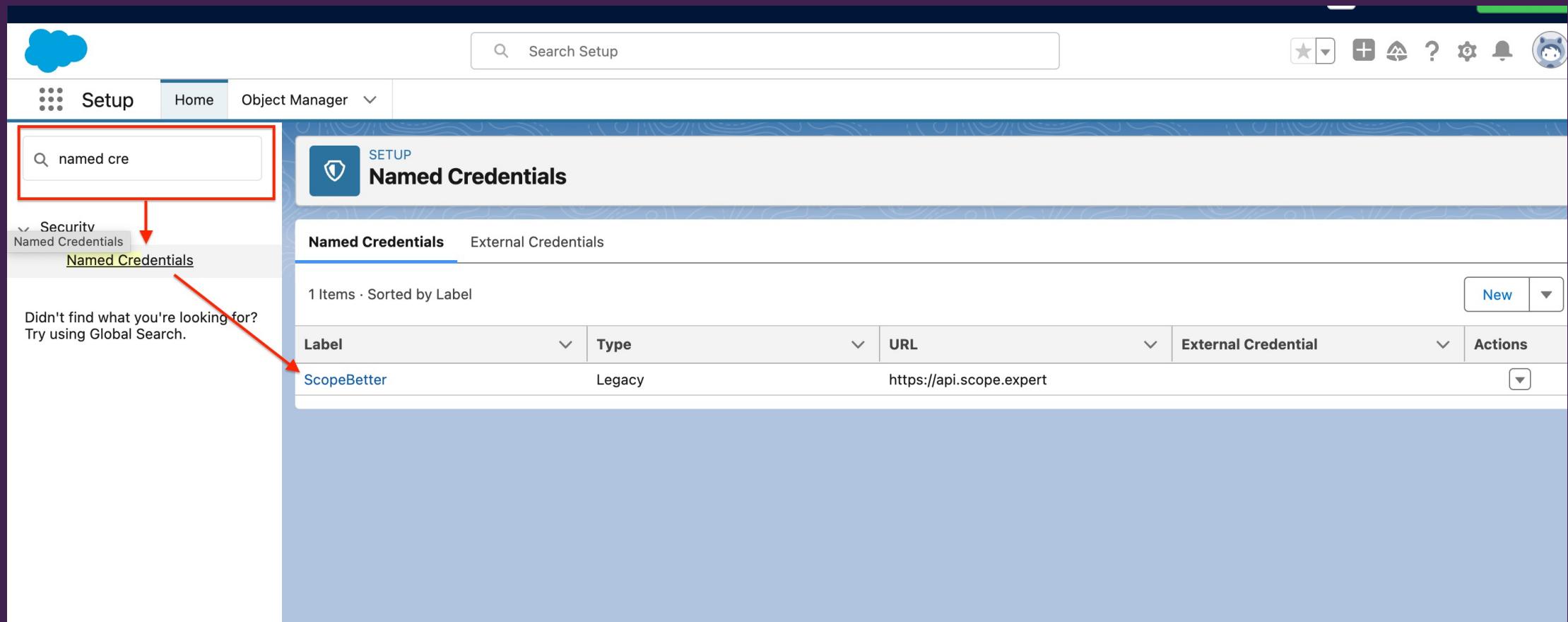


The screenshot shows a modal window titled 'Generate API Key'. The window contains a message: 'This API key is generated for personal use to Scope's public api (<https://api.scope.expert>). Your access secret key will be displayed only once, please keep a record of this. You have the option to download your details as CSV.' Below the message, there are two text boxes: 'Access Key:' containing 'UppykA32S5CePanSnhyuZg' and 'Secret Key:' containing '20noasX4QSu4UD_2hE5u9Q'. At the bottom of the modal is an orange 'Download as CSV' button.

Open "Setup"



Search for “Named Credentials”



The screenshot shows the Salesforce Setup interface. The search bar at the top contains the text "named cre". The "Named Credentials" tab is selected under the "Named Credentials" section of the navigation menu. A message at the bottom left says "Didn't find what you're looking for? Try using Global Search." A red box highlights the search bar, and a red arrow points from the "Named Credentials" message to the "ScopeBetter" entry in the list.

Search Setup

named cre

Setup Home Object Manager

SETUP

Named Credentials

Named Credentials External Credentials

1 Items · Sorted by Label

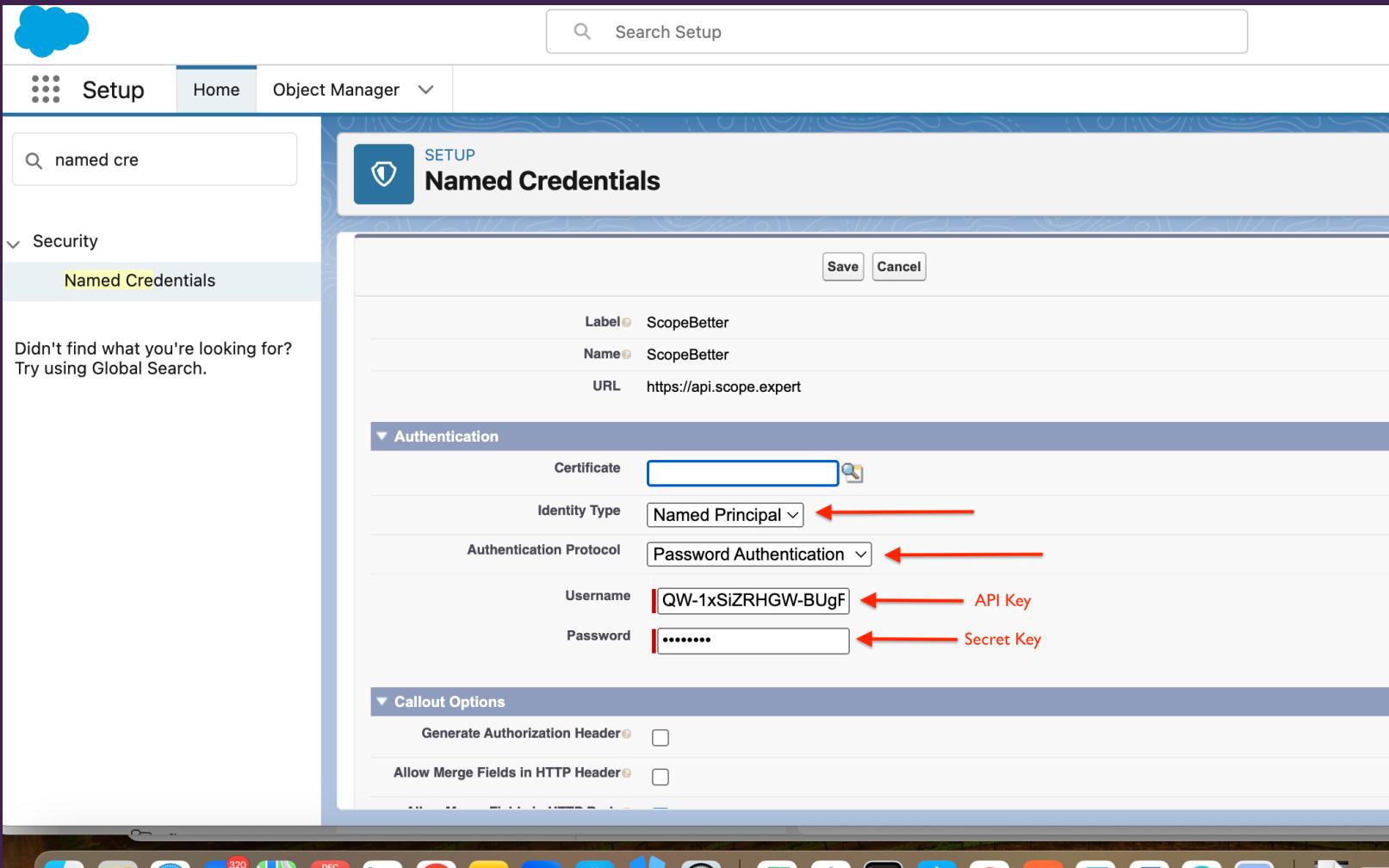
New

Label Type URL External Credential Actions

ScopeBetter	Legacy	https://api.scope.expert	
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Didn't find what you're looking for?
Try using Global Search.

Update Named Credentials



Edit Opportunity page

SCOPE BETTER

Find Opportunities page

Sales Home Leads Accounts Contacts Opportunities Calendar Forecasts Dashboards Reports Quotes

App Launcher

Search apps and items...

Apps

- Sales (selected)
- Inside Sales
- Sales Leader
- Success Manager
- Sales Operations
- Usage
- Your Account

View All

View Opportunities

3

Plan My Accounts

Accounts owned by me

3 Accounts

- 3 Upcoming Activity
- 0 Past Activity
- 0 No Activity

View Accounts

7

Grow Relationships

Contacts owned by me and created in the last 90 days

7 Contacts

- 6 Upcoming Activity
- 0 Past Activity
- 1 No Activity

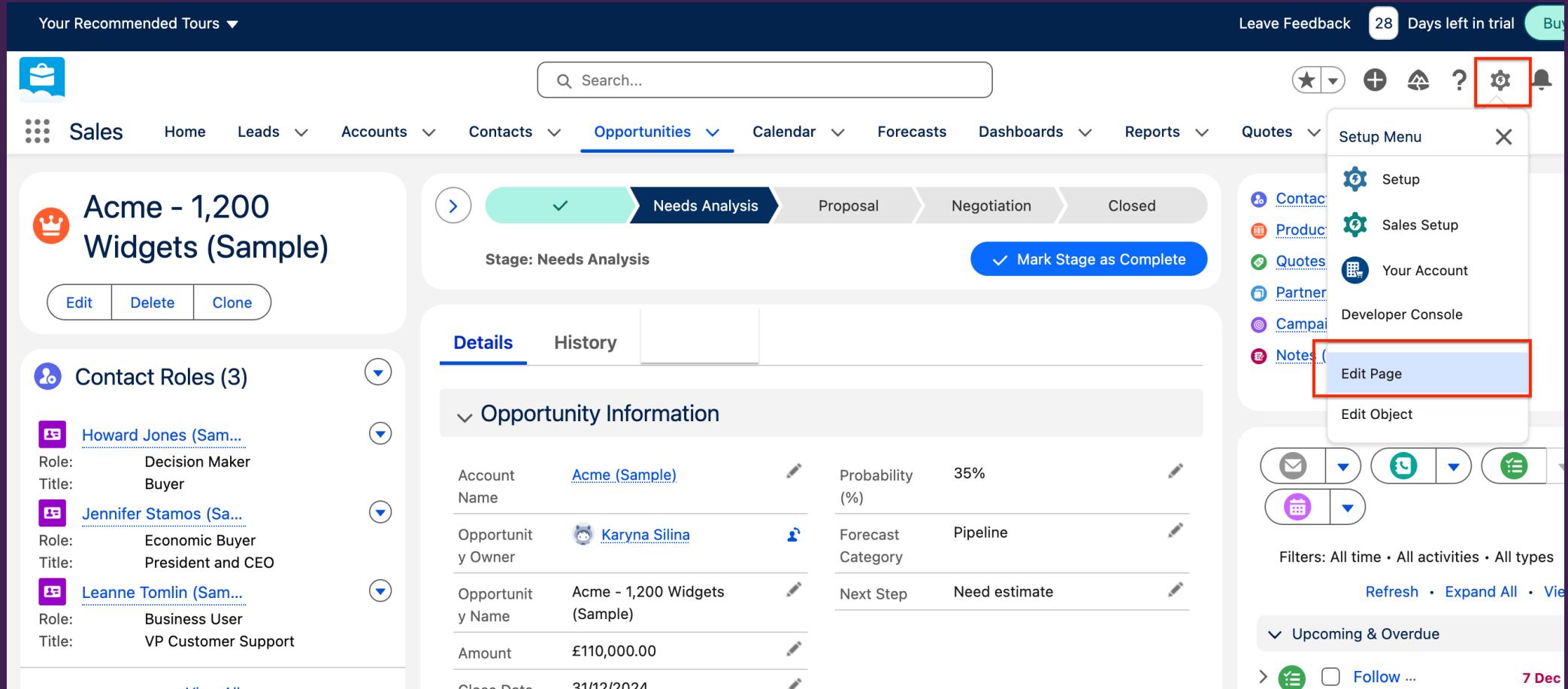
View Contacts

Build Pipeline

My Goals

Today's Events

In one of Opportunities – Edit Page



The screenshot shows the Salesforce Opportunities page for an opportunity named "Acme - 1,200 Widgets (Sample)". The opportunity is in the "Needs Analysis" stage. The "Edit Page" option is highlighted in the Setup menu.

Opportunity Details:

- Account:** Acme (Sample)
- Name:** Acme - 1,200 Widgets (Sample)
- Opportunity Owner:** Karyna Silina
- Probability (%):** 35%
- Forecast Category:** Pipeline
- Next Step:** Need estimate
- Amount:** £110,000.00
- Close Date:** 31/12/2024

Contact Roles (3):

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

Setup Menu:

- Setup
- Contact
- Product
- Quotes
- Partner
- Campaign
- Notes
- Edit Page (highlighted)

Buttons:

- Edit
- Delete
- Clone
- Mark Stage as Complete

Header:

- Your Recommended Tours
- Leave Feedback
- 28 Days left in trial
- Buy

Toolbar:

- Search...
- Star
- Plus
- Up
- Down
- Question
- Settings (highlighted)
- Bell

Add Tab

The screenshot shows a CRM application interface with a dark blue header and a light gray content area. The header includes standard navigation buttons (Back, Forward, Home, etc.), a dropdown for 'Desktop' (with 'Shrink To View' and 'Full Screen' options), and buttons for 'Analyze', 'Activation...', and 'Save'.

The main content area is divided into several sections:

- Components** (selected): A sidebar with a search bar for 'Custom' components. It lists three categories: **Standard (0)**, **Custom (0)**, and **Custom - Managed (0)**.
- Opportunity** (Active): A card for 'Acme - 1,200 Widgets (Sample)' showing the opportunity stage: 'Needs Analysis'.
- Details** (Active): The main view showing 'Opportunity Information' and 'Additional Information' sections. The 'History' tab is also visible.
- History** (Active): A view showing a timeline of recent activities, including tasks and events. A red arrow points from the 'History' tab in the main view to this section.
- Page > Tabs**: A sidebar for managing tabs. It shows the 'Default Tab' set to '<First Tab>'. The 'Tabs' section lists 'Details' and 'History' (which is currently active). A red arrow points to the 'Add Tab' button.
- Set Component Visibility**: A section for managing component visibility, with a 'Filters' button and a 'Add Filter' button.

Select “Custom” and name it “SCOPE”

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

Components Fields

Custom

Standard (0)

Custom (0)

Custom - Managed (0)

Acme - 1,200 Widgets (Sample)

Contact Roles (3)

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

View All

Partners (0)

Quotes (0)

Products (0)

Details History Details

Needs Analysis Proposal Negotiation Closed

Stage: Needs Analysis

Mark Stage as Complete

Contact Roles (3)

Products (0)

Quotes (0)

Partners (0)

Campaign Influence (9)

Notes (3)

Account Name

Opportunity Owner

Opportunity Name

Amount

Close Date

Stage

Probability (%)

Forecast

Next Step

Tab Label

Details

Set Component Visibility

Filters

+ Add Filter

Done

Find “Custom” in the dropdown!

Page > Tabs

Default Tab

<First Tab>

Details

History

Details

Add Tab

Set Component Visibility

Filters

+ Add Filter

Tab Label

Custom

*Custom Label

SCOPE

Set Component Visibility

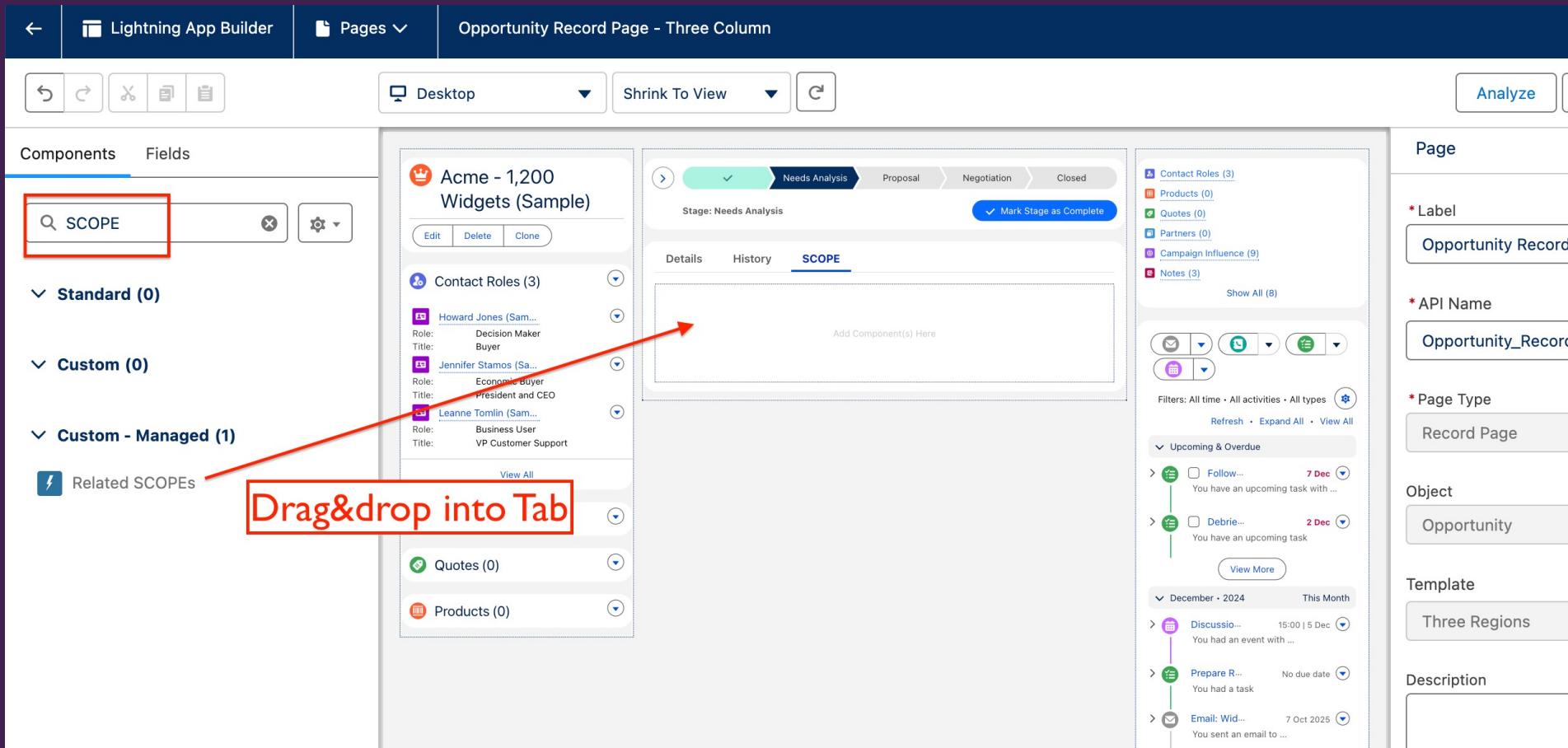
Filters

+ Add Filter

Done

The screenshot shows the Lightning App Builder interface for creating a custom tab on an Opportunity Record Page. The 'Components' tab is selected in the sidebar. A search bar shows 'Custom'. The main area displays a list of standard components: Contact Roles (3), Partners (0), Quotes (0), and Products (0). A 'Custom' component is listed under 'Custom (0)'. A 'Custom - Managed (0)' section is also present. A red box highlights the 'Custom' component in the list. A red arrow points from the 'Custom' label in the sidebar to the 'Custom' label in the 'Tab Label' field of the 'Set Component Visibility' dialog. The 'Tab Label' field contains 'SCOPE'. The 'Done' button is visible at the bottom of the dialog. The 'Page > Tabs' sidebar shows the 'Default Tab' set to '<First Tab>'. The 'Details' tab is selected. A 'Set Component Visibility' dialog is open, showing 'Filters' and 'Tab Label' fields. The 'Tab Label' field is highlighted with a blue border. The 'Done' button is visible at the bottom of the dialog. The 'Page > Tabs' sidebar shows the 'Default Tab' set to '<First Tab>'. The 'Details' tab is selected. A 'Set Component Visibility' dialog is open, showing 'Filters' and 'Tab Label' fields. The 'Tab Label' field is highlighted with a blue border. The 'Done' button is visible at the bottom of the dialog.

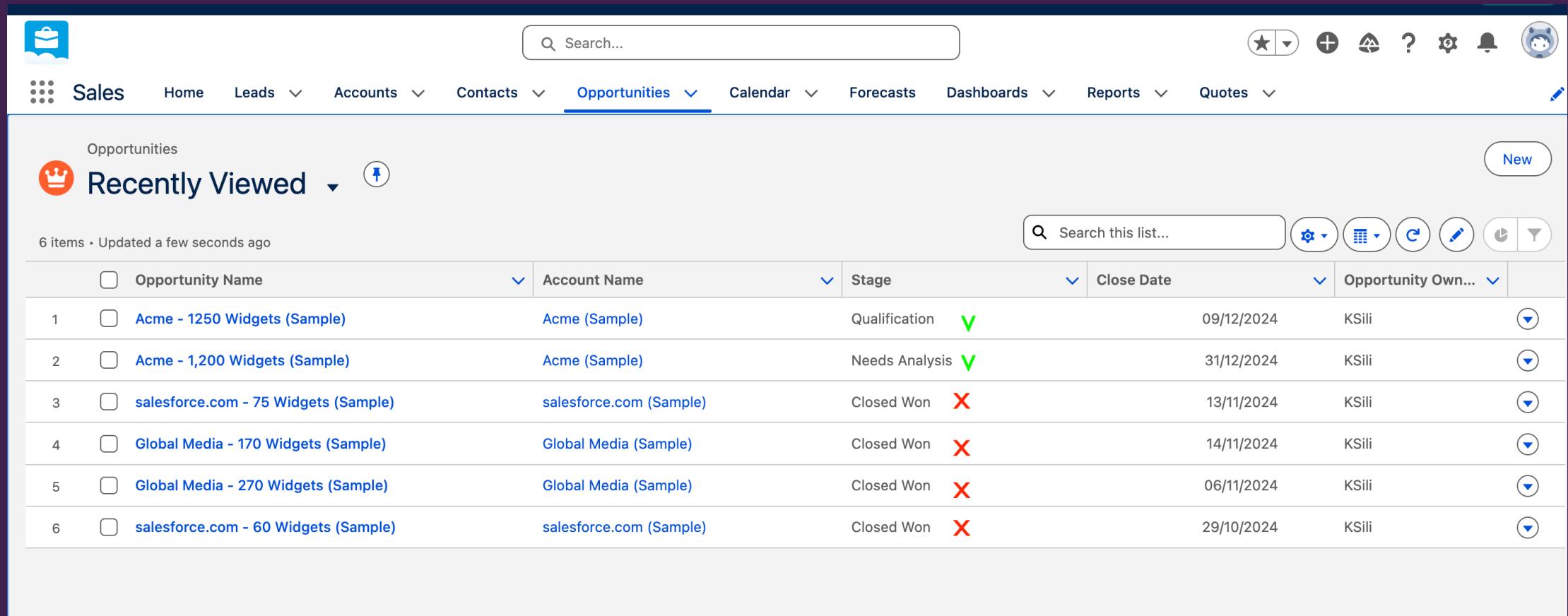
Add “Related SCOPES” component to the new tab



Test your new connector

SCOPE BETTER

Stages eligible for creating scopes



Sales Home Leads Accounts Contacts Opportunities Calendar Forecasts Dashboards Reports Quotes

Opportunities

Recently Viewed

Opportunity Name	Account Name	Stage	Close Date	Opportunity Own...
Acme - 1250 Widgets (Sample)	Acme (Sample)	Qualification	09/12/2024	KSili
Acme - 1,200 Widgets (Sample)	Acme (Sample)	Needs Analysis	31/12/2024	KSili
salesforce.com - 75 Widgets (Sample)	salesforce.com (Sample)	Closed Won	13/11/2024	KSili
Global Media - 170 Widgets (Sample)	Global Media (Sample)	Closed Won	14/11/2024	KSili
Global Media - 270 Widgets (Sample)	Global Media (Sample)	Closed Won	06/11/2024	KSili
salesforce.com - 60 Widgets (Sample)	salesforce.com (Sample)	Closed Won	29/10/2024	KSili

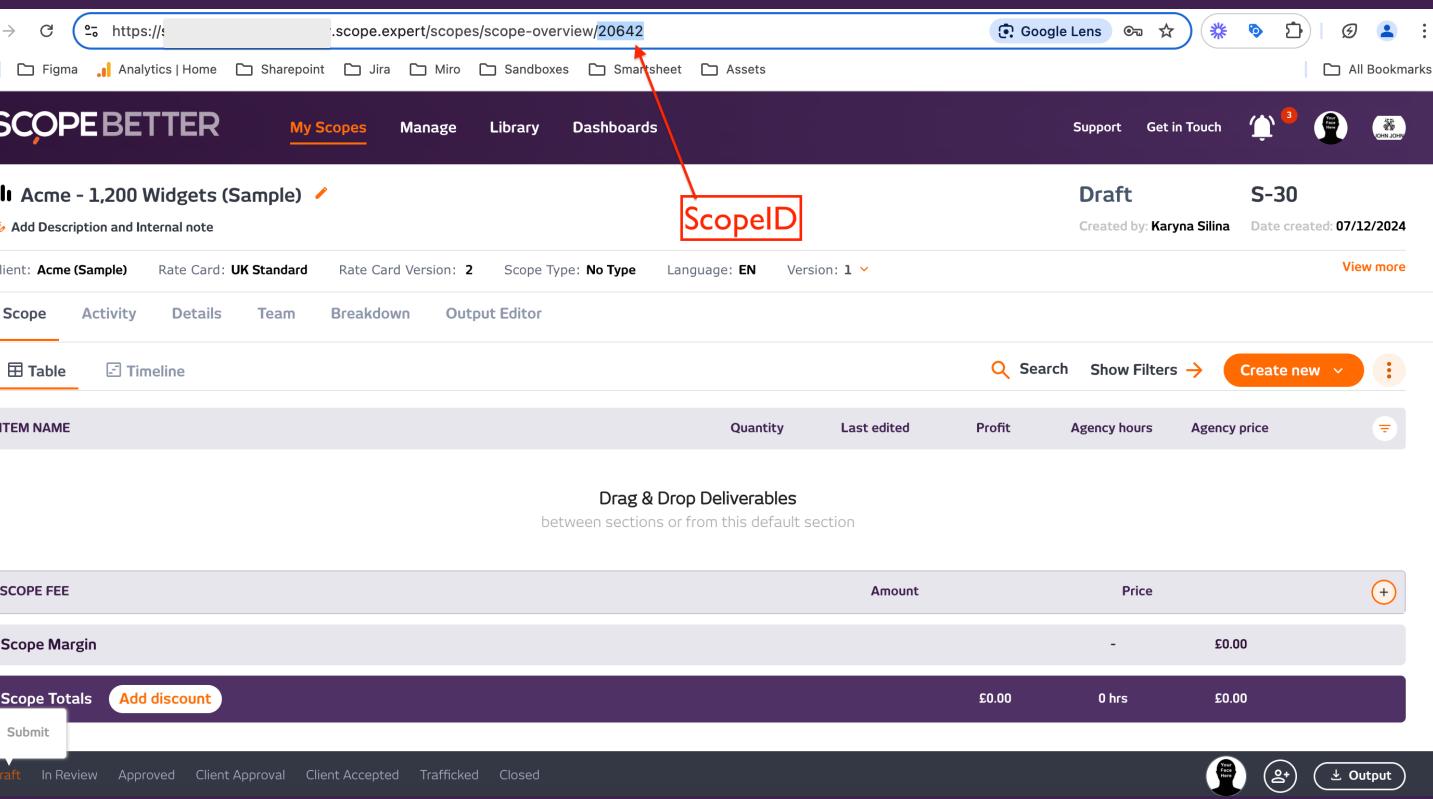
Create a scope

- 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

The screenshot shows a software interface for managing project scopes. At the top, a navigation bar indicates the current stage: 'Needs Analysis' (highlighted in green), followed by 'Proposal', 'Negotiation', and 'Closed'. Below the stage, a button says 'Mark Stage as Complete'. The main area is titled 'Stage: Needs Analysis'. There are three tabs: 'Details', 'History', and 'SCOPE', with 'SCOPE' being the active tab. A sub-header 'Related SCOPES' is shown with a 'Create Scope' button and a 'Link Scope' button. A 'Refresh' button is also present. A table lists three related scopes with columns for SCOPE ID, Name, Status, Start, End, Budget, Revenue, and Margin. The first scope is '20642 Acme - 1,200 Wi...', 'DRAFT', with a budget of 500, revenue of 0, and margin of 0. The second scope is '20535 Dummy', 'DRAFT', with a budget of 6000, revenue of 324, and margin of 209. The third scope is '20641 Acme - 1,200 Wi...', 'CLOSED', with a budget of 110000, revenue of 3300, and margin of 1185.

SCOPE ID	Name	Status	Start	End	Budget	R.	M.
20642	Acme - 1,200 Wi...	DRAFT	7 D...	31 ...	500	0	0
20535	Dummy	DRAFT	3 D...	3 M...	6000	324	209
20641	Acme - 1,200 Wi...	CLOSED	7 D...	31 ...	110000	3300	1185

Add (Link) existing ScopelD to Opportunities



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

ScopelD

Acme - 1,200 Widgets (Sample)

Draft S-30

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

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

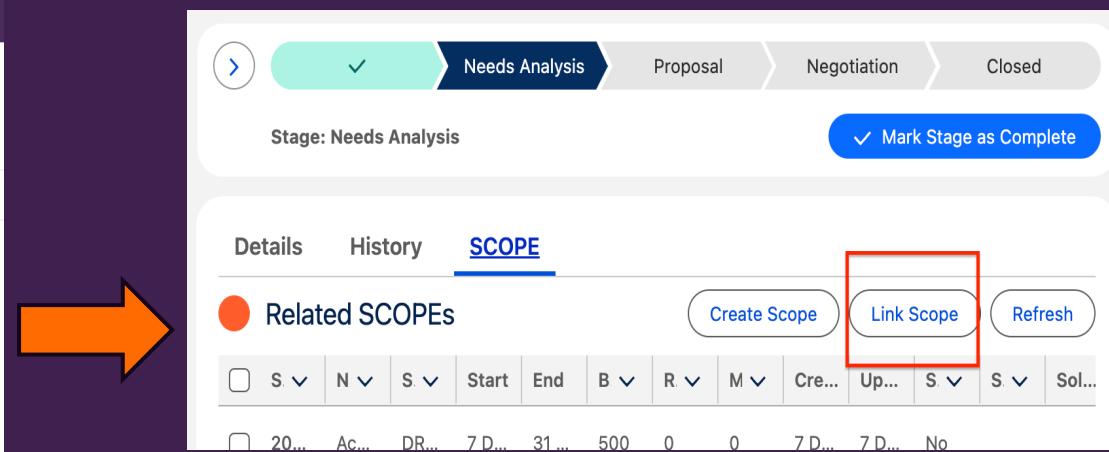
Scope Margin

Scope Totals Add discount

£0.00 0 hrs £0.00

Submit

In Review Approved Client Approval Client Accepted Trafficked Closed



Needs Analysis

Stage: Needs Analysis

Mark Stage as Complete

Details History SCOPE

Related SCOPES

Create Scope Link Scope Refresh