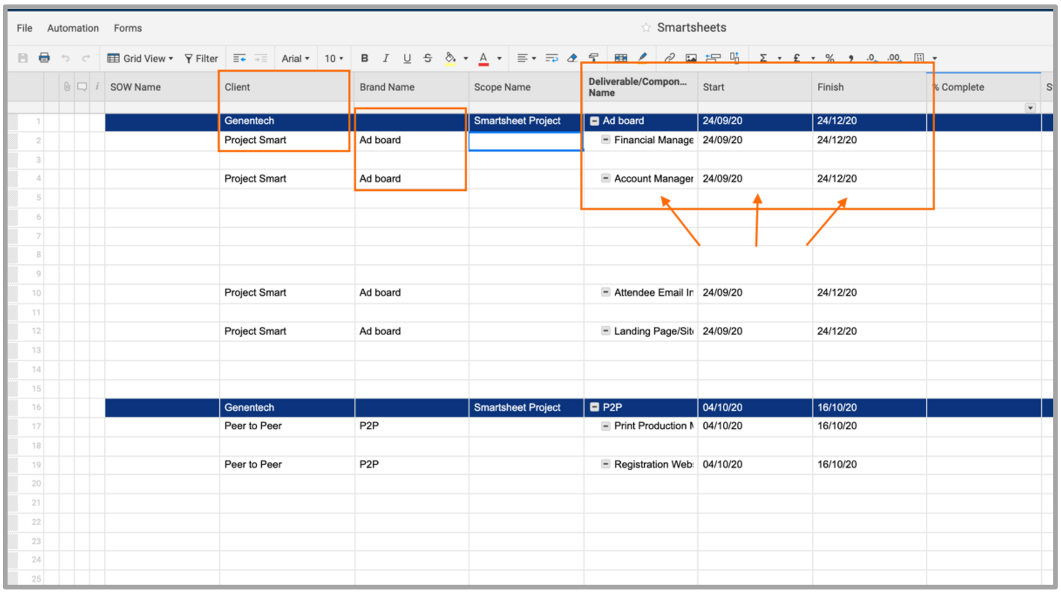
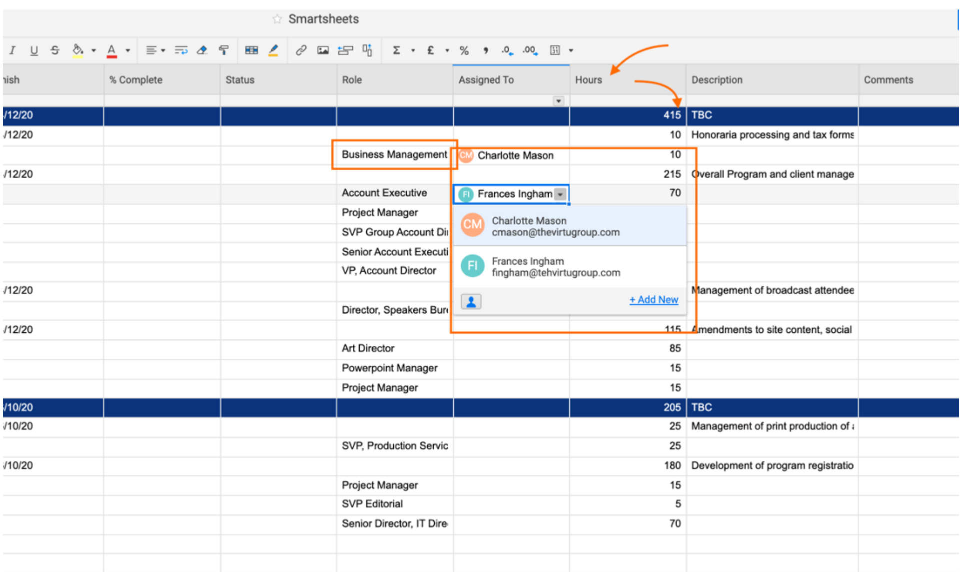
Set up SCOPE Better with Smartsheets.

With the SCOPE Better system managing your scoping price and taxonomy consistency, the integration between SCOPE Better and Smartsheet enables the detail of each scope created, to be published directly in to Smartsheet removing hours of time spent after the scoping process - project planning.



The data contained within each scope formatted by deliverable/component line items, transfers to Smartsheets ready to be manipulated into a larger project plan – where adapting timelines, associating tasks with users, and applying a Gantt chart.



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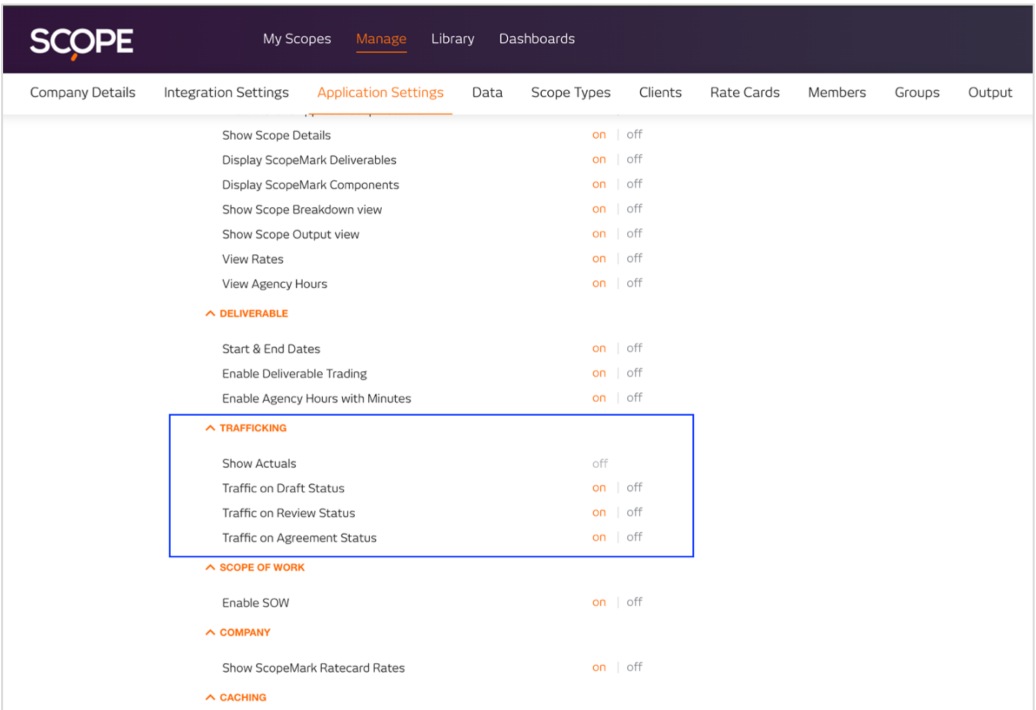
Being able to assign each line item task to one of your team, seeing the overall hours and the description of the tasks all in one place, from scoping, to project plan to resource planning in 3 simple steps.

For integrations, you will need an account with Smartsheets

Integrating SCOPE Better to your Smartsheet account is a simple process and once complete, allows you to push a scope out to Smartsheet at any of your businesses selected stages of the scoping process.

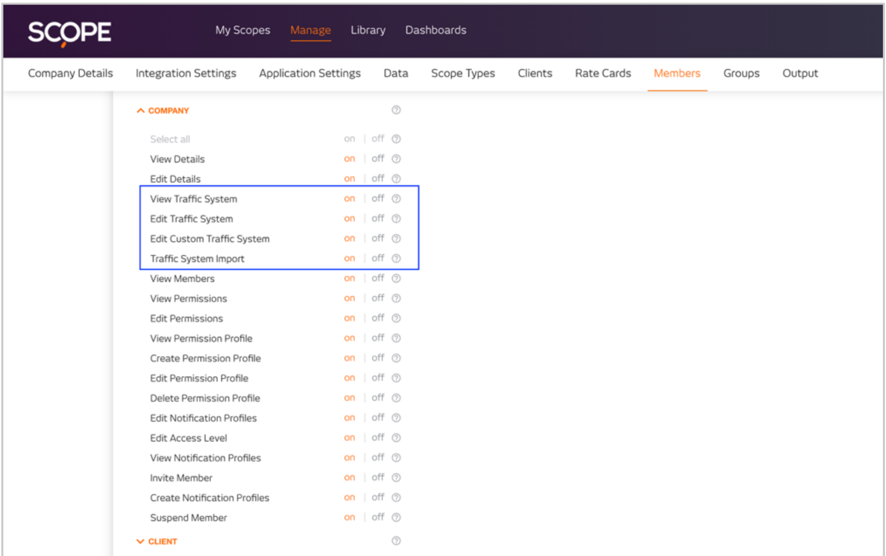
Step 1:

- Log into SCOPE Better
- Select 'Manage'
- Select 'Application Settings'
- Switch all Traffic option required to 'on'



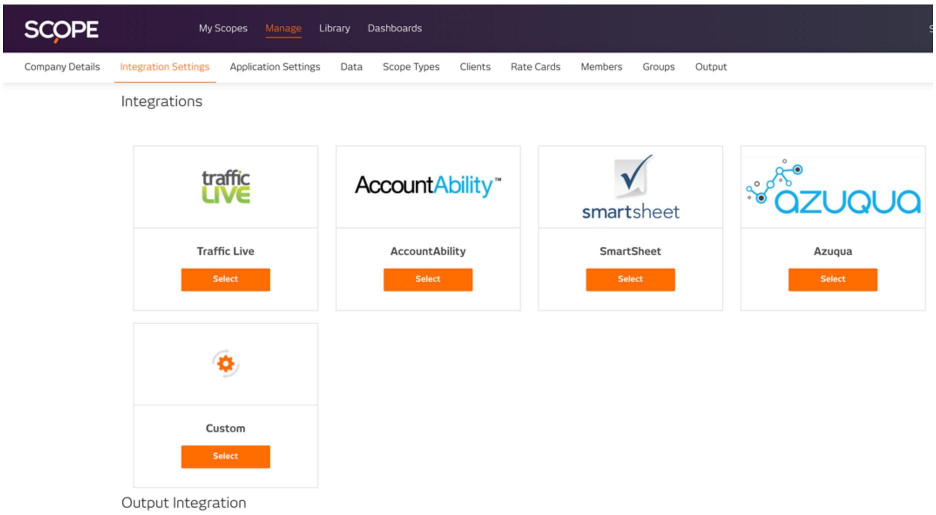
Step 2:

- Go to ‘Members’
- Click the arrow to view members permission settings
- Scroll to ‘Company’
- Switch on all Traffic options required to ‘on’



Step 3:

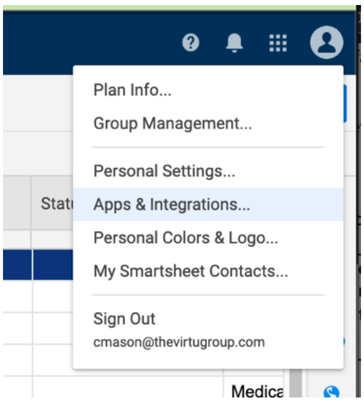
- Go to Manage
- Select ‘Integration Settings
- Choose ‘Select’ for ‘Smartsheet’



Smartsheet – Generate a new access token.

Step 4:

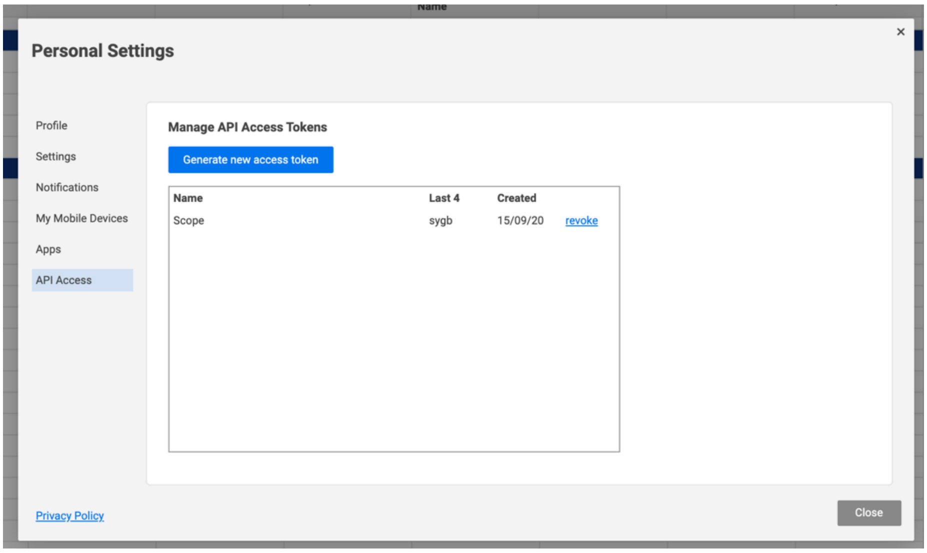
- Log into Smartsheets
- Go to ‘Settings’
- Select ‘Apps & Integrations’



Step 5:

- Go to ‘API Access’
- Click ‘Generate new ‘Access token’

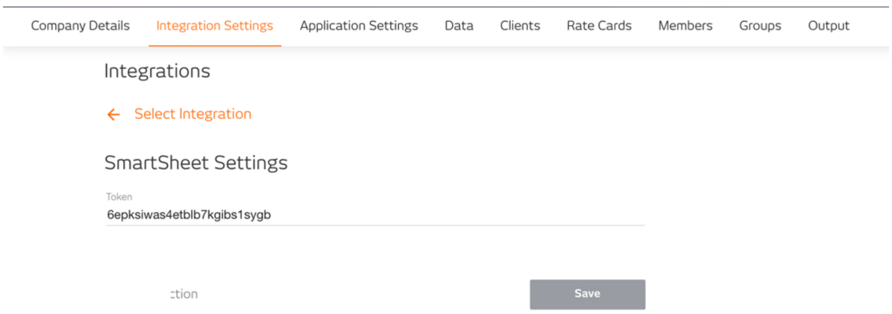
- Copy the token detail from the page



Scope – Applying the token to your Scope account

Step 6:

- Go to 'Manage'
- In 'Integrations Settings'
- Paste the Token detail



Step 7:

Testing the connection

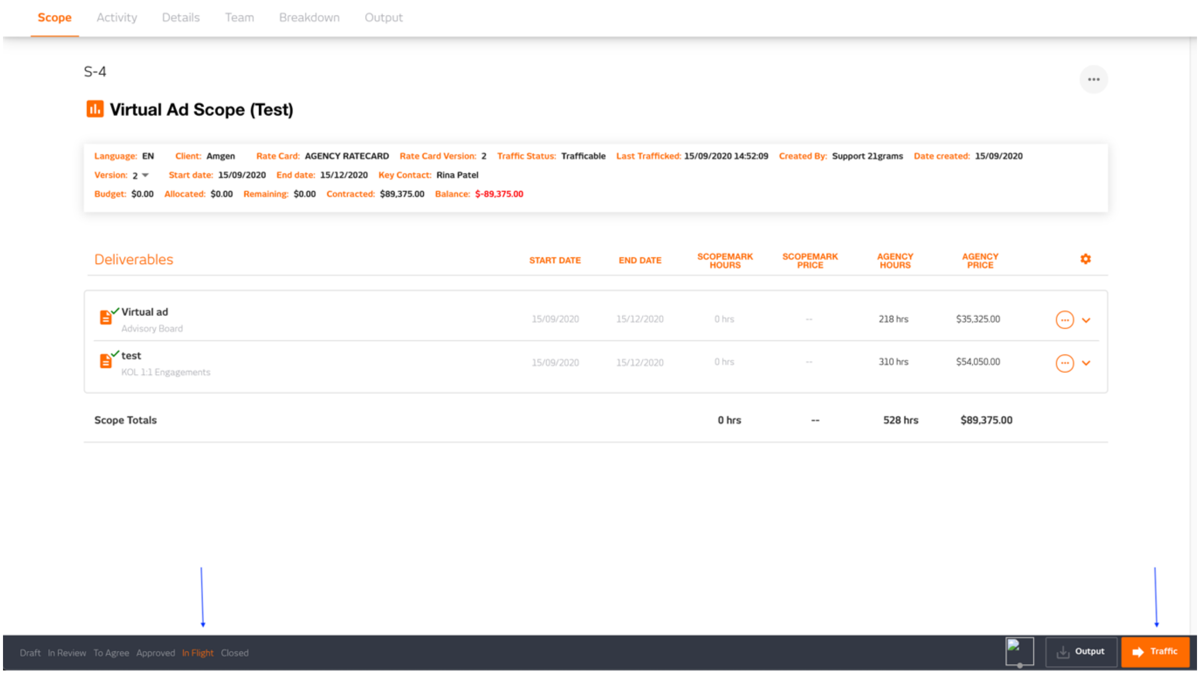
- Click on 'Test Connection'
- If green successful message appears, select 'Save'

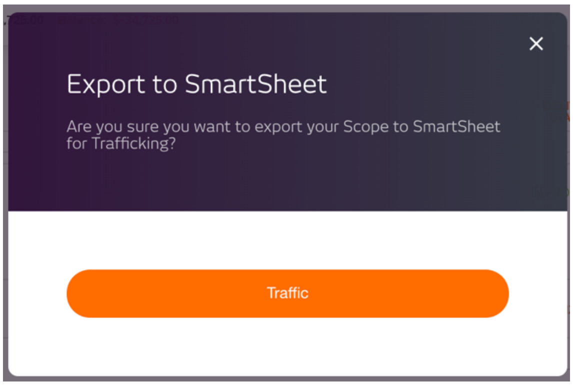
- If unsuccessful message appears, follow steps above again – try regenerating the token.

Trafficking your scope to Smartsheets

Step 8:

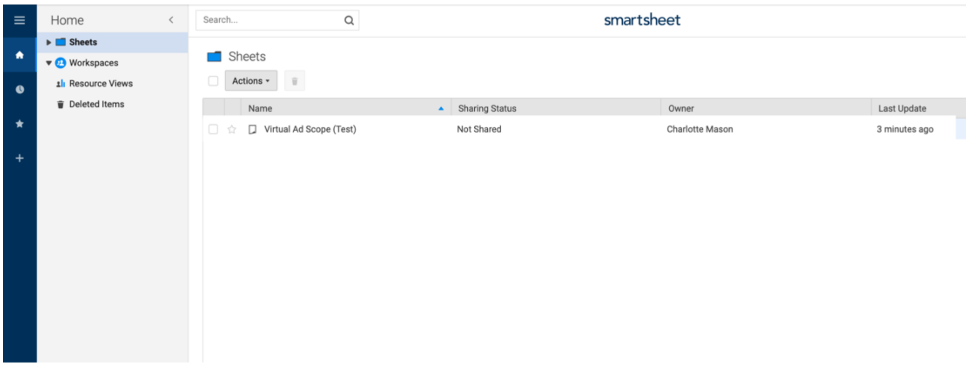
- Your scope is ready to be trafficked
- Select ‘Traffic’





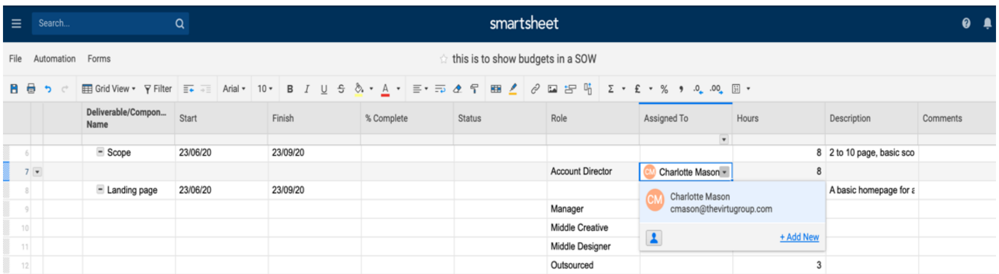
Step 9:

- Log into Smartsheets
- Click on 'sheets'
- See the trafficked scope listed as a file



Step 10:

- Select your document from the Smartsheet list of documents
- Review the data, amend dates, allocate names to roles if needed etc



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