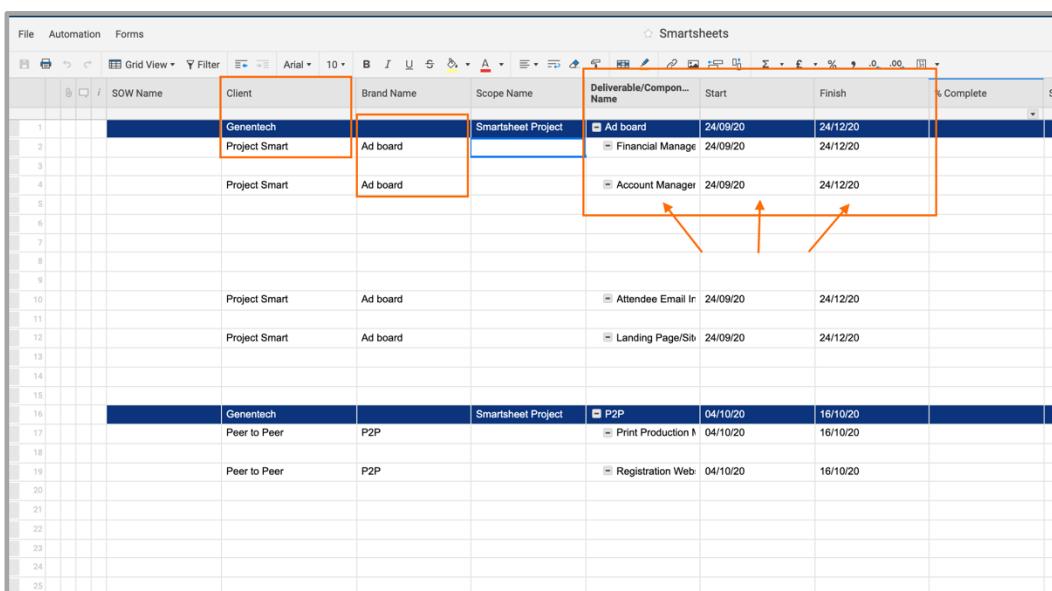


Set up SCOPE Better with Smartsheets.

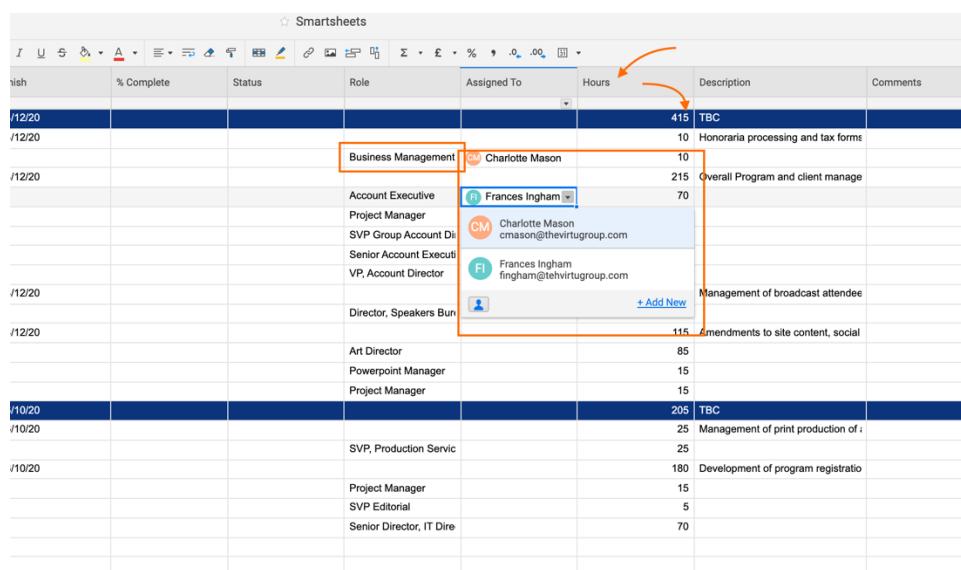
With the SCOPE Better system managing your scoping price and taxonomy consistency, the integration between SCOPE Better and Smartsheet enables the detail of each scope created, to be published directly in to Smartsheet removing hours of time spent after the scoping process - project planning.



The screenshot shows a Smartsheets grid with several rows of data. The columns include 'SOW Name', 'Client', 'Brand Name', 'Scope Name', 'Deliverable/Component Name', 'Start', 'Finish', and '% Complete'. The 'Client' column has rows for 'Genentech' and 'Project Smart'. The 'Scope Name' column has rows for 'Smartsheet Project', 'Ad board', and 'Ad board'. The 'Deliverable/Component Name' column has rows for 'Ad board', 'Financial Manager', and 'Account Manager'. Arrows point from the 'Scope Name' rows to the 'Deliverable/Component Name' rows, indicating a mapping or relationship between them.

SOW Name	Client	Brand Name	Scope Name	Deliverable/Component Name	Start	Finish	% Complete
1	Genentech		Smartsheet Project	Ad board	24/09/20	24/12/20	
2	Project Smart		Ad board	Financial Manager	24/09/20	24/12/20	
3			Ad board	Account Manager	24/09/20	24/12/20	
4							
5							
6							
7							
8							
9							
10		Project Smart	Ad board	Attendee Email	24/09/20	24/12/20	
11				Landing Page/Sit	24/09/20	24/12/20	
12							
13							
14							
15							
16	Genentech		Smartsheet Project	P2P	04/10/20	16/10/20	
17	Peer to Peer	P2P		Print Production	04/10/20	16/10/20	
18							
19	Peer to Peer	P2P		Registration Web	04/10/20	16/10/20	
20							
21							
22							
23							
24							
25							

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.



The screenshot shows a Smartsheets grid with several rows of data. The columns include 'Start', '% Complete', 'Status', 'Role', 'Assigned To', 'Hours', 'Description', and 'Comments'. The 'Assigned To' column contains user icons and names, such as 'Charlotte Mason' and 'Frances Ingham'. Arrows point from the 'Hours' column to the 'Description' column, indicating the duration of specific tasks.

Start	% Complete	Status	Role	Assigned To	Hours	Description	Comments
1/12/20					415	TBC	
1/12/20					10	Honoraria processing and tax forms	
1/12/20			Business Management	Charlotte Mason	215	Overall Program and client manage	
1/12/20			Account Executive	Frances Ingham	70		
			Project Manager				
			SVP Group Account Di				
			Senior Account Execut				
			VP, Account Director				
1/12/20			Director, Speakers Bur		115	Management of broadcast attendee	
1/12/20					85	Amendments to site content, social	
1/12/20					15		
1/12/20					15		
1/10/20					205	TBC	
1/10/20					25	Management of print production of	
1/10/20					25		
1/10/20			SVP, Production Servic		180	Development of program registratio	
1/10/20					15		
1/10/20					5		
1/10/20			Project Manager		70		
1/10/20			SVP Editorial				
1/10/20			Senior Director, IT Dire				

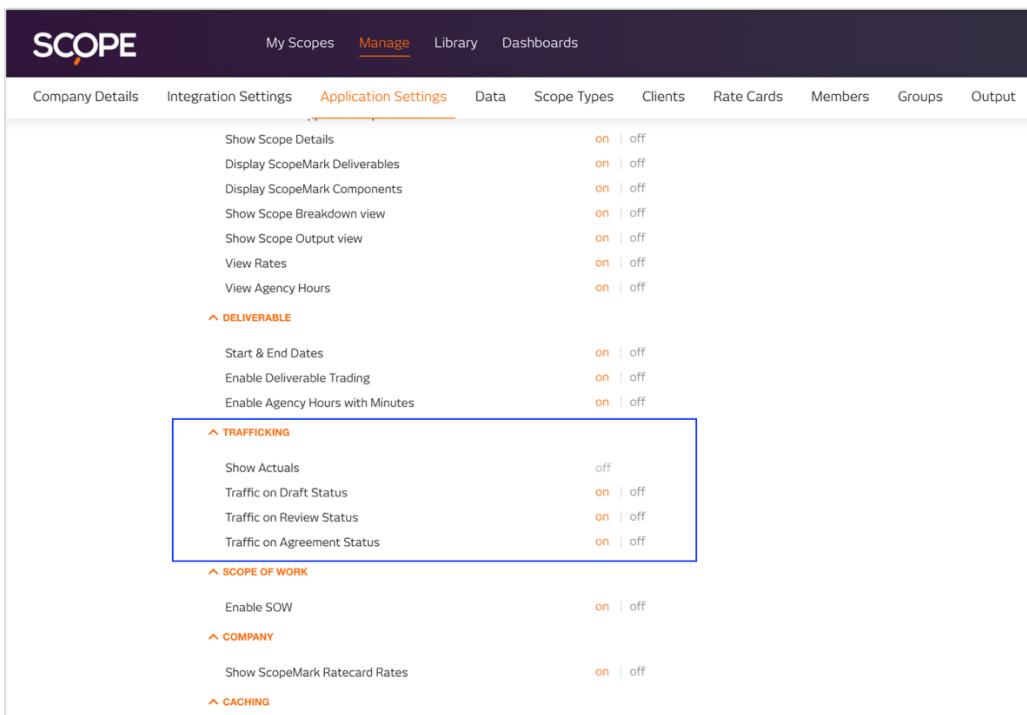
Being able to assign each line item task to one of your team, seeing the overall hours and the description of the tasks all in one place, from scoping, to project plan to resource planning in 3 simple steps.

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'



The screenshot shows the 'Application Settings' tab selected in the SCOPE Better interface. The 'TRAFFICKING' section is highlighted with a blue box. The table lists various settings with their current status (on/off).

Setting	Status
Show Scope Details	on off
Display ScopeMark Deliverables	on off
Display ScopeMark Components	on off
Show Scope Breakdown view	on off
Show Scope Output view	on off
View Rates	on off
View Agency Hours	on off
▲ DELIVERABLE	
Start & End Dates	on off
Enable Deliverable Trading	on off
Enable Agency Hours with Minutes	on off
▲ TRAFFICKING	
Show Actuals	off
Traffic on Draft Status	on off
Traffic on Review Status	on off
Traffic on Agreement Status	on off
▲ SCOPE OF WORK	
Enable SOW	on off
▲ COMPANY	
Show ScopeMark Ratecard Rates	on off
▲ CACHING	

Step 2:

SCOPE BETTER

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

Permission	Status
Select all	on off ⓘ
View Details	on off ⓘ
Edit Details	on off ⓘ
View Traffic System	on off ⓘ
Edit Traffic System	on off ⓘ
Edit Custom Traffic System	on off ⓘ
Traffic System Import	on off ⓘ
View Members	on off ⓘ
View Permissions	on off ⓘ
Edit Permissions	on off ⓘ
View Permission Profile	on off ⓘ
Create Permission Profile	on off ⓘ
Edit Permission Profile	on off ⓘ
Delete Permission Profile	on off ⓘ
Edit Notification Profiles	on off ⓘ
Edit Access Level	on off ⓘ
View Notification Profiles	on off ⓘ
Invite Member	on off ⓘ
Create Notification Profiles	on off ⓘ
Suspend Member	on off ⓘ

Step 3:

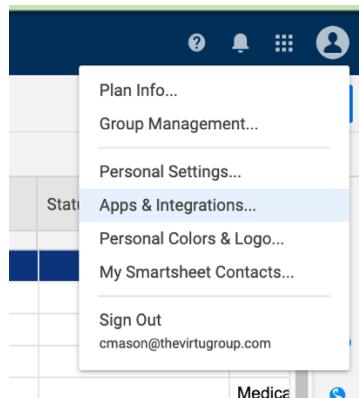
- Go to Manage
- Select 'Integration Settings'
- Choose 'Select' for 'Smartsheet'

The screenshot shows the SCOPE application's 'Integration Settings' page. At the top, there are tabs for 'Company Details', 'Integration Settings' (which is selected and highlighted in orange), 'Application Settings', 'Data', 'Scope Types', 'Clients', 'Rate Cards', 'Members', 'Groups', and 'Output'. Below the tabs, the word 'Integrations' is centered. There are four main integration cards: 'trafficLIVE' (with a 'Select' button), 'AccountAbility™' (with a 'Select' button), 'Smartsheet' (with a 'Select' button), and 'Azuqua' (with a 'Select' button). Below these is a 'Custom' section with a 'Select' button. At the bottom of this section, the text 'Output Integration' is visible.

Smartsheet – Generate a new access token.

Step 4:

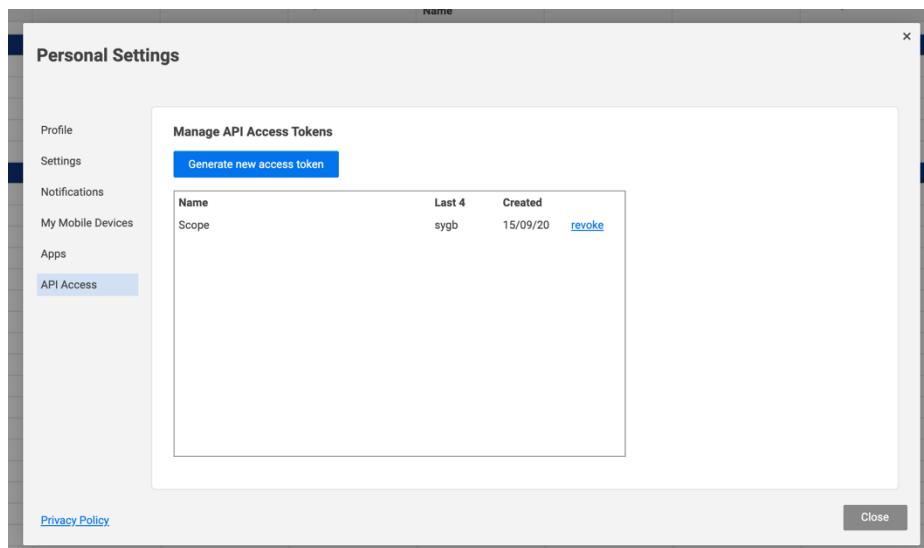
- Log into Smartsheets
- Go to 'Settings'
- Select 'Apps & Integrations'



Step 5:

- Go to 'API Access'
- Click 'Generate new 'Access token''

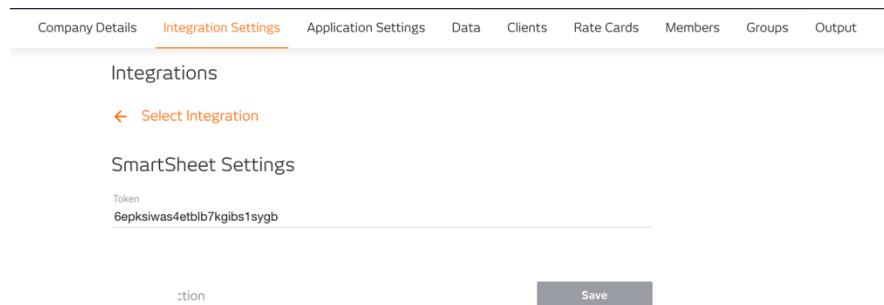
- Copy the token detail from the page



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'

Test connection
connection is successful

- 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'

Scope Activity Details Team Breakdown Output

S-4

Virtual Ad Scope (Test)

Language: EN	Client: Amgen	Rate Card: AGENCY RATECARD	Rate Card Version: 2	Traffic Status: Trafficable	Last Trafficked: 15/09/2020 14:52:09	Created By: Support 21grams	Date created: 15/09/2020
Version: 2	Start date: 15/09/2020	End date: 15/12/2020	Key Contact: Rina Patel				
Budget: \$0.00	Allocated: \$0.00	Remaining: \$0.00	Contracted: \$89,375.00	Balance: \$-89,375.00			

Deliverables

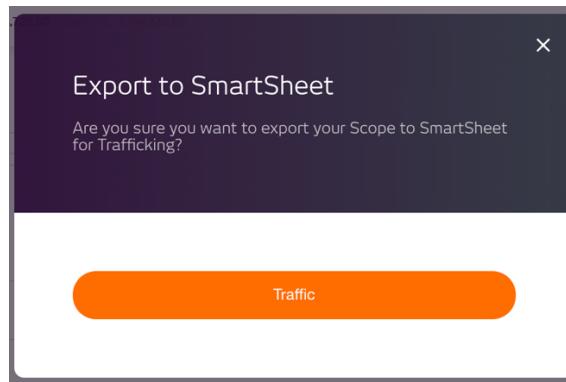
	START DATE	END DATE	SCOPEMARK HOURS	SCOPEMARK PRICE	AGENCY HOURS	AGENCY PRICE	...
Virtual ad Advisory Board	15/09/2020	15/12/2020	0 hrs	--	218 hrs	\$35,325.00	...
test KOL 1:1 Engagements	15/09/2020	15/12/2020	0 hrs	--	310 hrs	\$54,050.00	...

Scope Totals

0 hrs	--	528 hrs	\$89,375.00
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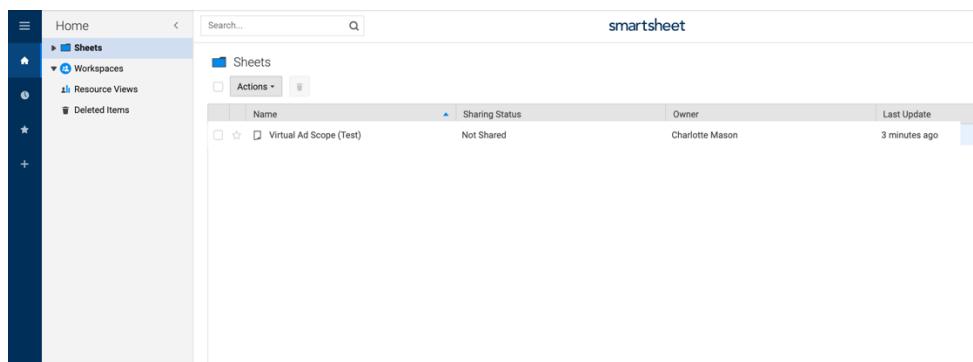
Draft In Review To Agree Approved In Flight Closed

Output 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

	Deliverable/Component Name	Start	Finish	% Complete	Status	Role	Assigned To	Hours	Description	Comments
6	Scope	23/06/20	23/09/20						8	2 to 10 page, basic scope
7	Landing page	23/06/20	23/09/20			Account Director	Charlotte Mason	8		
8						Manager	CM	Charlotte Mason	cmason@thevirtugroup.com	A basic homepage for a
9						Middle Creative				
10						Middle Designer				
11						Outsourced				
12										