

## 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.

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 Manage	24/09/20	24/12/20	
3				Account Manager	24/09/20	24/12/20	
4	Project Smart	Ad board					
5							
6							
7							
8							
9							
10	Project Smart	Ad board		Attendee Email In	24/09/20	24/12/20	
11							
12	Project Smart	Ad board		Landing Page/Sit	24/09/20	24/12/20	
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.

Task	% 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					215	Overall Program and client manage	
					70		
1/12/20						Management of broadcast attendee	
1/12/20					115	Amendments to site content, social	
					85		
					15		
					15		
1/10/20					205	TBC	
1/10/20					25	Management of print production of :	
					25		
1/10/20					180	Development of program registratio	
					15		
					5		
					70		

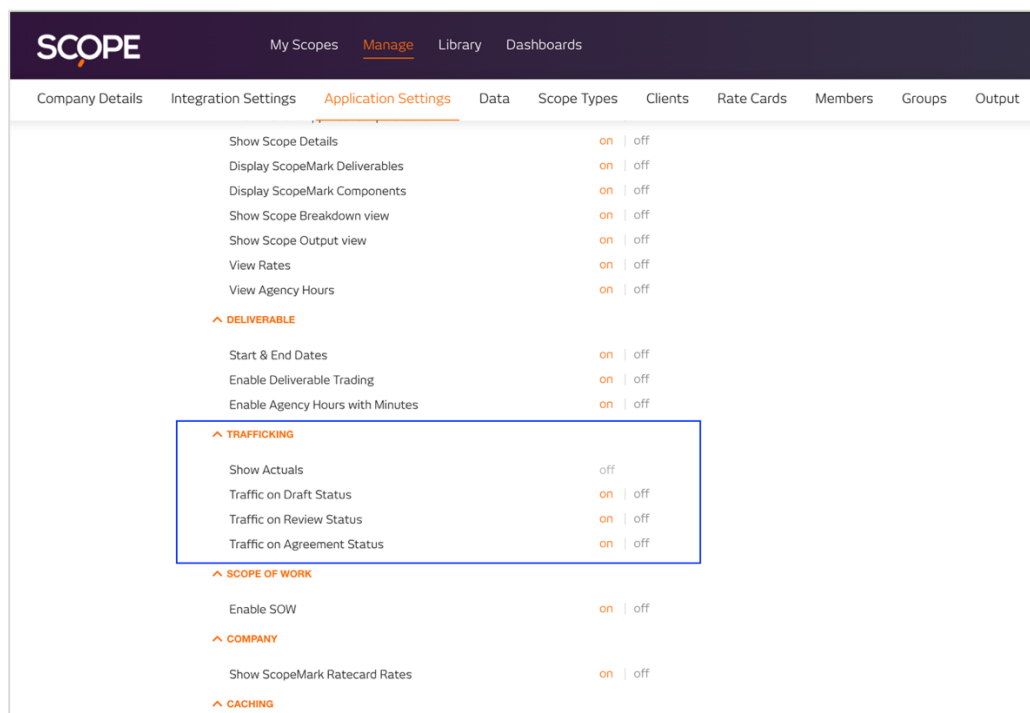
Being able to assign each line item task to one of your team, seeing the overall hours and the description of the tasks all in one place, from scoping, to project plan to resource planning in 3 simple steps.

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:

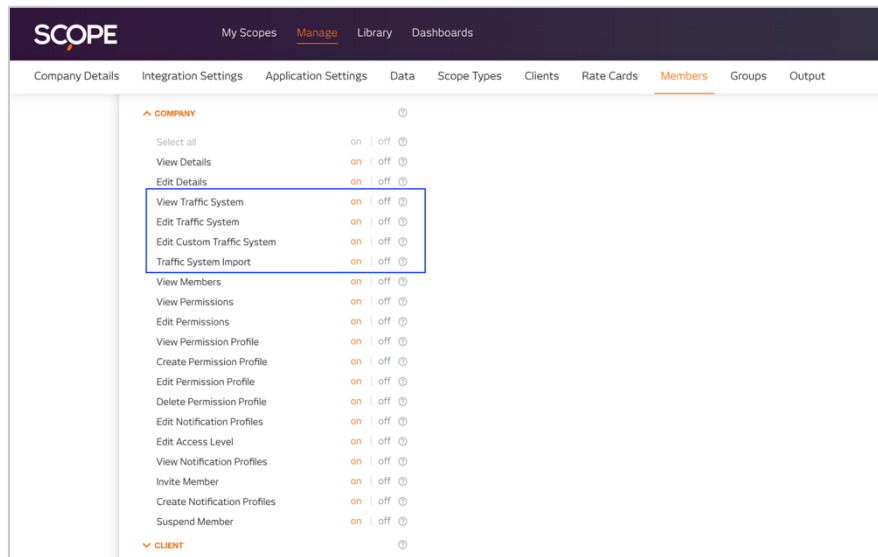
- Log into SCOPE Better
- Select 'Manage'
- Select 'Application Settings'
- Switch all Traffic option required to 'on'



### Step 2:

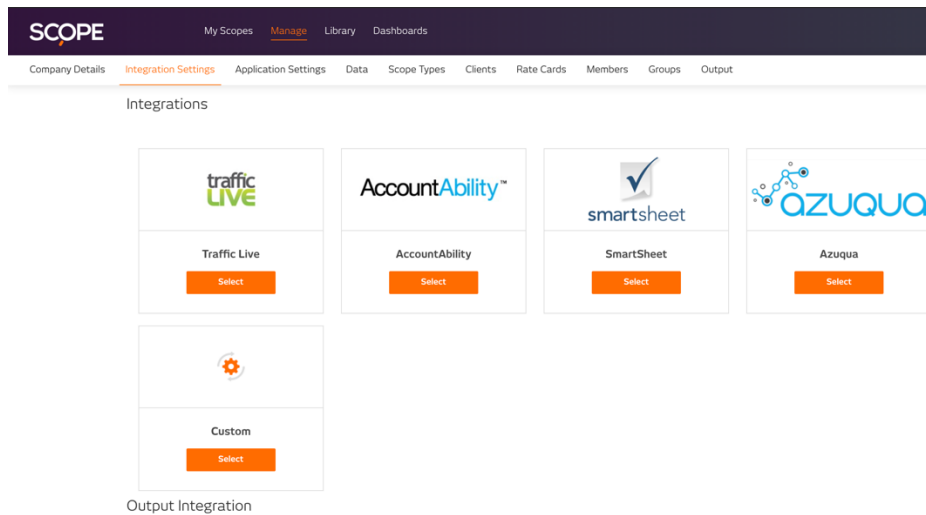
**SCOPE BETTER**

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



### Step 3:

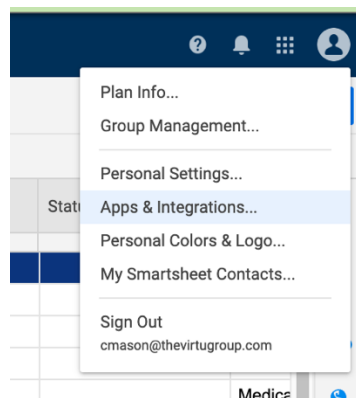
- Go to Manage
- Select 'Integration Settings'
- Choose 'Select' for 'Smartsheet'



## Smartsheet – Generate a new access token.

### Step 4:

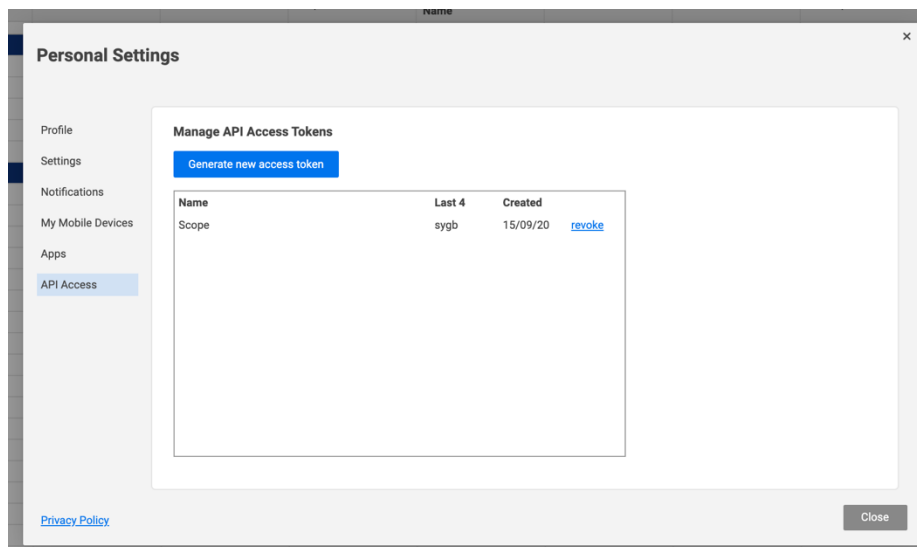
- Log into Smartsheets
- Go to 'Settings'
- Select 'Apps & Integrations'



### Step 5:

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

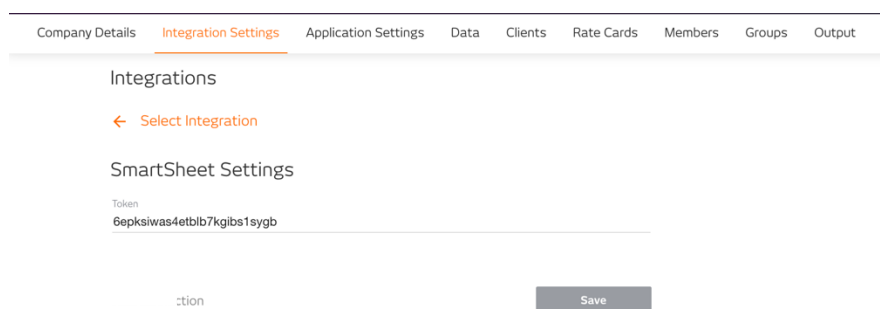
- Copy the token detail from the page



## 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'

Test connection  
✔ connection is successful

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

## Trafficking your scope to Smartsheets

### Step 8:

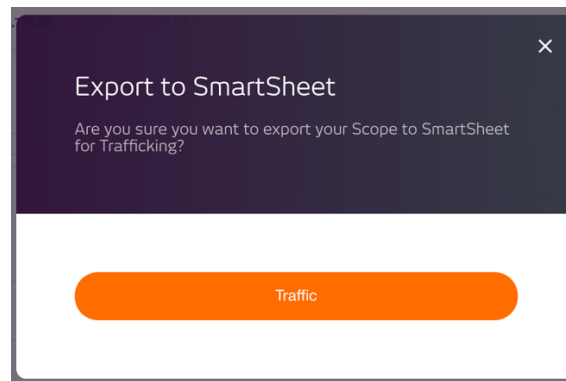
- Your scope is ready to be trafficked
- Select 'Traffic'

The screenshot displays the 'Scope' tab in the Scope Better interface. At the top, a navigation bar includes 'Scope', 'Activity', 'Details', 'Team', 'Breakdown', and 'Output'. Below this, the scope is identified as 'S-4 Virtual Ad Scope (Test)'. A summary bar provides key details: Language: EN, Client: Amgen, Rate Card: AGENCY RATECARD, Rate Card Version: 2, Traffic Status: Traffickable, 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, and Balance: \$-89,375.00.

The 'Deliverables' section contains a table with the following data:

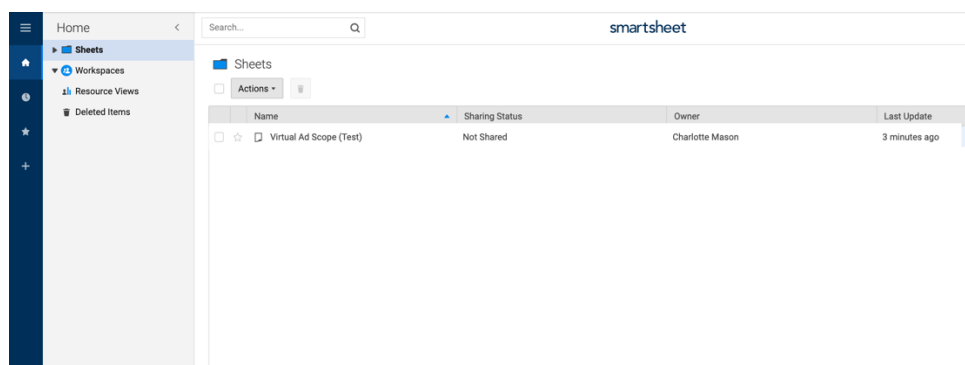
	START DATE	END DATE	SCOPEMARK HOURS	SCOPEMARK PRICE	AGENCY HOURS	AGENCY PRICE	
Virtual ad Advisory Board	15/09/2020	15/12/2020	0 hrs	--	218 hrs	\$35,325.00	⋮
test KOL 1:1 Engagements	15/09/2020	15/12/2020	0 hrs	--	310 hrs	\$54,050.00	⋮
Scope Totals			0 hrs	--	528 hrs	\$89,375.00	

At the bottom, a status bar shows the workflow: Draft, In Review, To Agree, Approved, In Flight, Closed. On the right, there are buttons for 'Output' and 'Traffic'. Two blue arrows point to the 'Traffic' button and the 'In Flight' status.



### 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

 A screenshot of a Smartsheet document view. The interface includes a top navigation bar, a menu bar (File, Automation, Forms), and a toolbar. The main area is a table with columns: Deliverable/Component Name, Start, Finish, % Complete, Status, Role, Assigned To, Hours, Description, and Comments. The table contains three rows of data. The second row is highlighted.
 

	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 scc	
7	Landing page	23/06/20	23/09/20			Account Director	Charlotte Mason	8	A basic homepage for e	
8						Manager	Charlotte Mason cmason@thevirtugroup.com			
9						Middle Creative				
10						Middle Designer				
11						Outsourced		3		