SyncroMSP Integration Setup

What's in this article:

- How to connect SyncroMSP to MSPbots
- Prebuilt Datasets for SyncroMSP
- Prebuilt Widgets for SyncroMSP
- Prebuilt Dashboards for SyncroMSP

How to connect SyncroMSP to MSPbots

1. Secure the Site and Token information for your SyncroMSP account.
   a. Go to SyncroMSP API Tokens page and click the **+New Token** button.
   b. Click the **Custom Permissions** tab.
   c. Give the new token a **Name**.
   d. Enter an **Expiration** date.
   e. Select the **Permissions** that you want to activate.
   f. Select the **Create API Token** option.

New Token

ⓘ TOKEN TYPES

API tokens in Syncro come in two types: prebuilt **App Integration** tokens for your convenience and **Custom** for flexibility.

| App Integration | Custom Permissions |

Please note: The permissions available for selection are limited by the permissions of the current user.

Name

Custom Token Example

Expiration

31-08-2020

⚙ **Edit API Permissions**   Show all permissions

☐ Assets - View Details

☐ Assets - List/Search

☐ Assets - Delete

☐ Assets - Edit

☐ Assets - Create

☐ Appointments - View All (see-own never restricted)

☑ Contacts - Import

☑ Customers - Create

☑ Customers - List/Search

☑ Customers - View Detail

☑ Customers - View Total Invoiced

☑ Customers - Edit

☑ Customers - Delete

☑ Customers - Edit Block Hours

☑ Customers - De Duplicate

☐ Credentials - View

☐ Credentials - New

2. Log in to the MSbots app and navigate to **Integrations** on the menu.
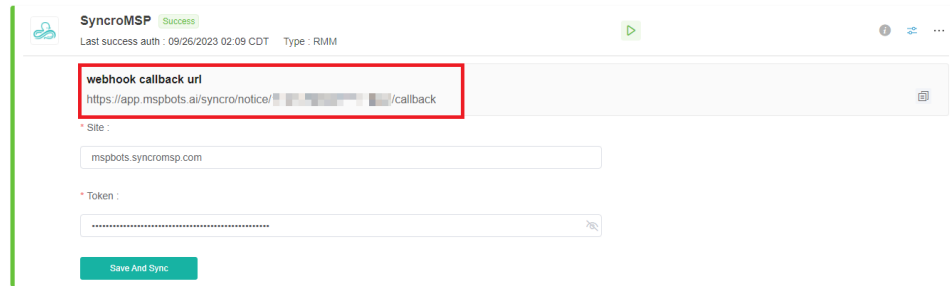3. On the **Integrations** tab, search for **SyncroMSP** and click it.

4. Enter the **Site** and **Token** in the corresponding fields.

5. Click **Save And Sync**.
6. Once SyncroMSP is connected successfully to the MSPbots app, an automatic generation of the **webhook callback url** will occur. Simply click

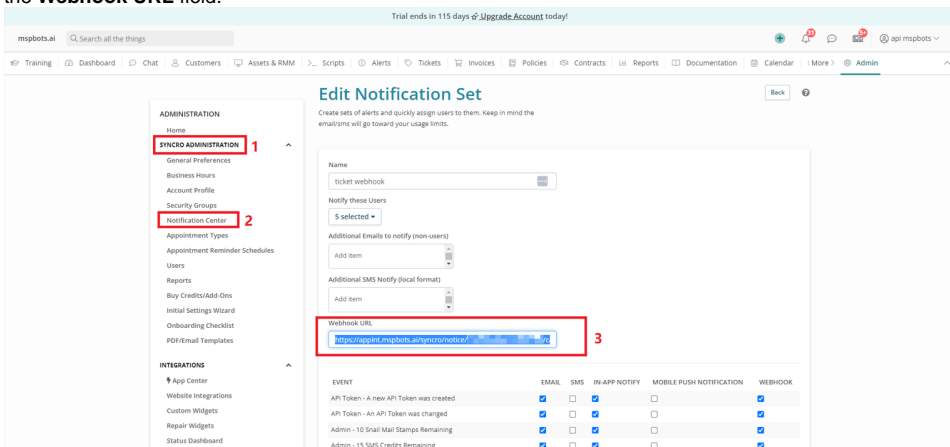   to **copy this webhook callback URL.**

The webhook callback URL is a real-time callback URL provided by the MSPbots app to establish a seamless connection between the SyncroMSP integration and the MSPbots app.

When specific events or notifications occur in SyncroMSP, such as ticket updates or device failures, the webhook is triggered instantly and transmits the corresponding data to the MSPbots app. This ensures that you have immediate access to important SyncroMSP information within the MSPbots, allowing prompt responses and decision-making.

The webhook callback URL also eliminates the need for manual checking of SyncroMSP. As a result, you can easily track and manage notifications and events originating from SyncroMSP and seamlessly integrate with other business processes or tools.
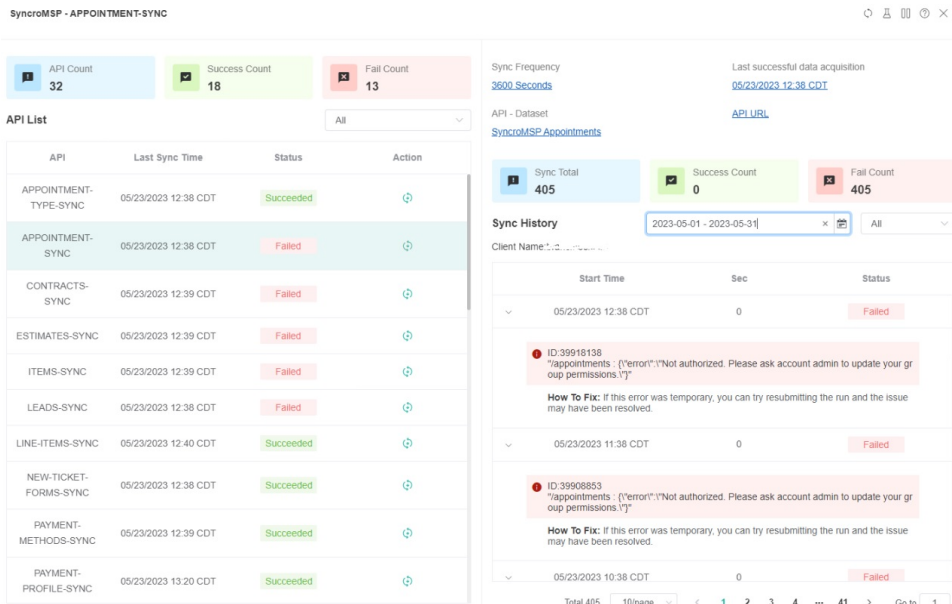
7. In the SyncroMSP app, navigate to **SYNCRO ADMINISTRATION** > **Notification Center** and paste the value of the webhook callback URL into the **Webhook URL** field.

If the API is not authorized, you will see a synchronization failure log on the API details page like the example below.

For information on investigating and resolving synch issues, read the article *How can I fix the red number alert on Integrations?* and section 2.2 in the article *Integrations*.

Prebuilt Datasets for SyncroMSP

View the available SyncroMSP datasets on the page SyncroMSP Public Datasets.

Prebuilt Widgets for SyncroMSP

View the available SyncroMSP widgets on the page SyncroMSP Public Widgets.

Prebuilt Dashboards for SyncroMSP

View the available SyncroMSP dashboards on the page SyncroMSP Public Dashboards.