

# SQL Agent Integration Setup

This guide will help you do the following steps for connecting the MSPbots SQL agent.

What's in this article:

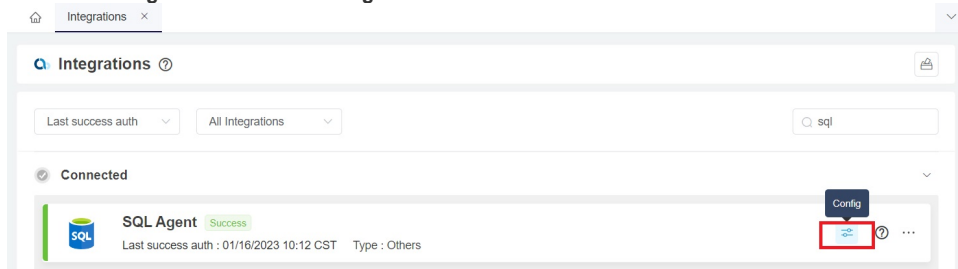
1. [Complete the prerequisites](#)
2. [Connect the MSPbots agent](#)
3. [Set up the MSPbots Agent Connector](#)
4. [Create a dataset and validate the data](#)
5. [Save the logs and send the file to MSPbots Support Team](#)
6. [Related Topics](#)

## 1. Complete the prerequisites

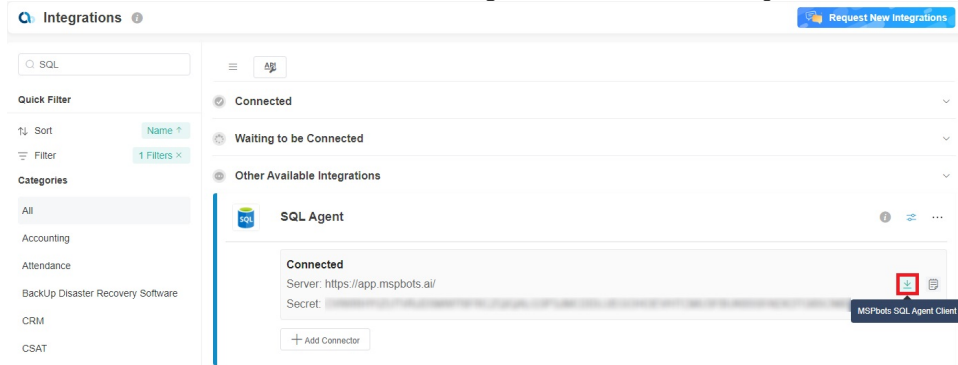
Please create a new read-only account in your SQL Server or MySQL as follows: [How to Create a Read-only Account for Your SQL Server or MySQL](#). If you already have a read-only account specifically for communicating with MSPbots, please skip this prerequisite.

## 2. Connect the MSPbots agent

- a. Go to **Integrations** on the MSPbots app menu.
- b. Find the **SQL Agent** and click the **Config** icon.

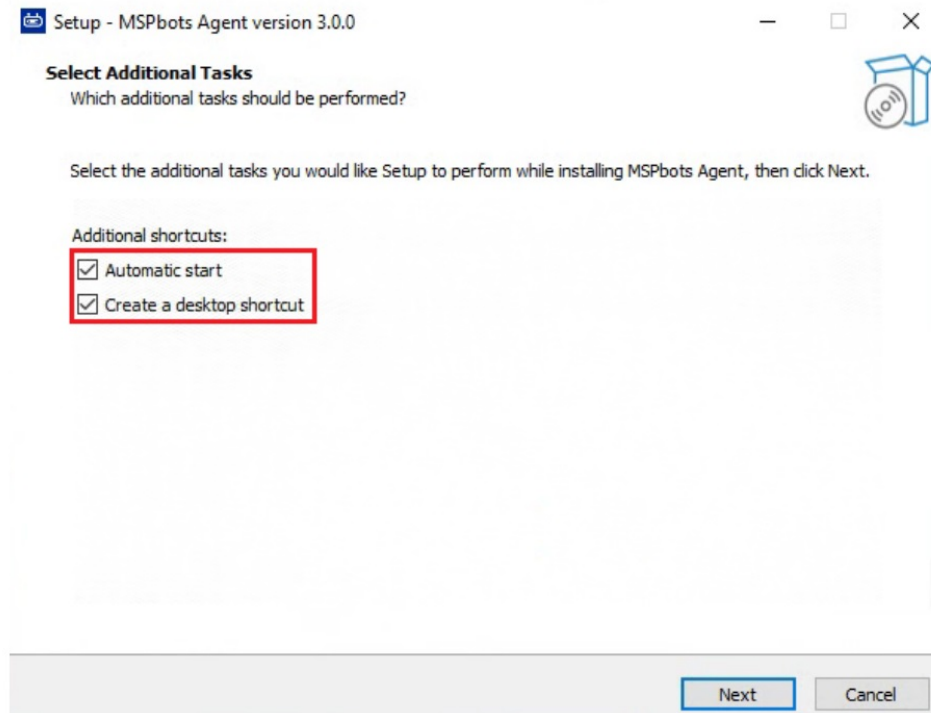


- c. Next, click the download icon for the **MSPbots SQL Agent Client** to start downloading the installer file.

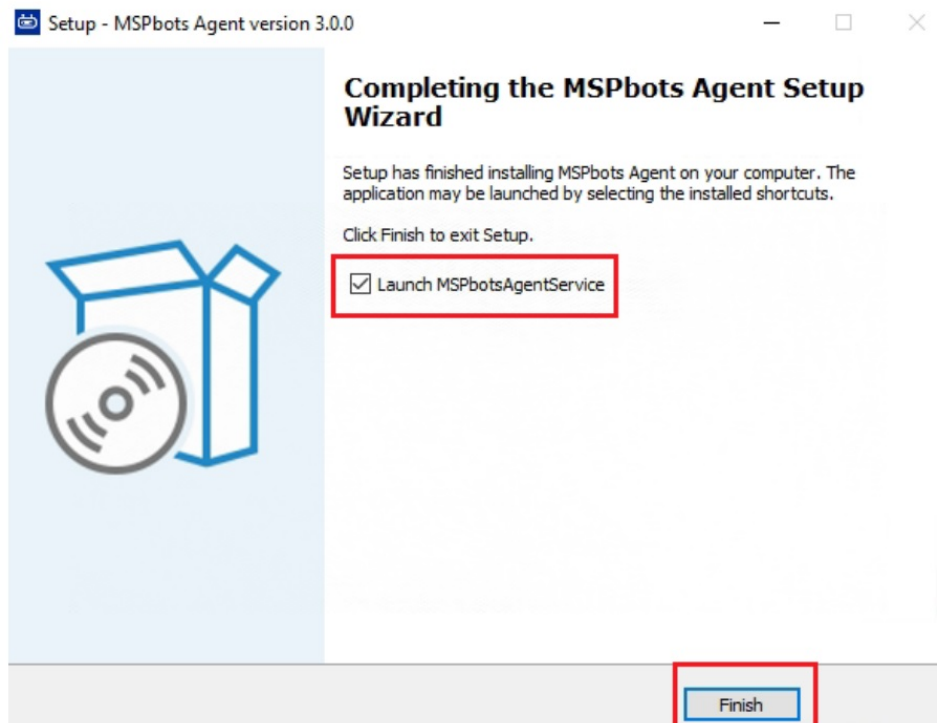


- d. After the download is complete, follow the prompts to install the **MSPbots SQL Agent** client.

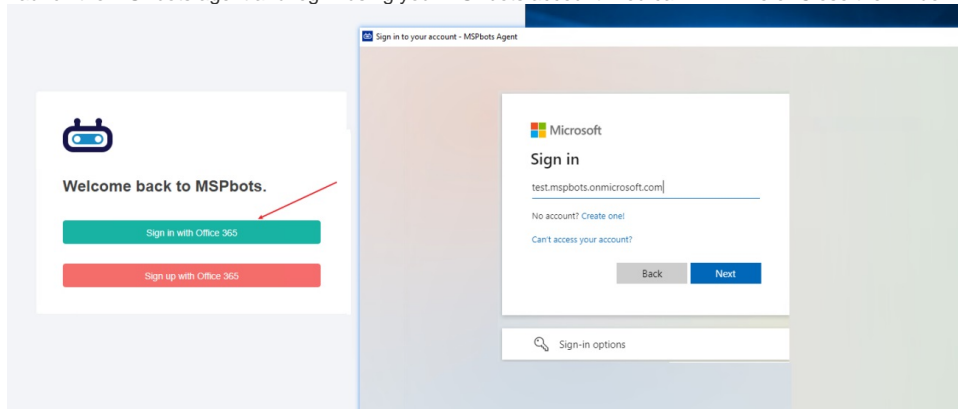
- e. During the setup, select **Automatic Start** and **Create a desktop shortcut**, then click **Next**.



- f. In the last step, tick the **Launch MSPbotsAgentService** checkbox and click **Finish**. The window will automatically close when the service starts.

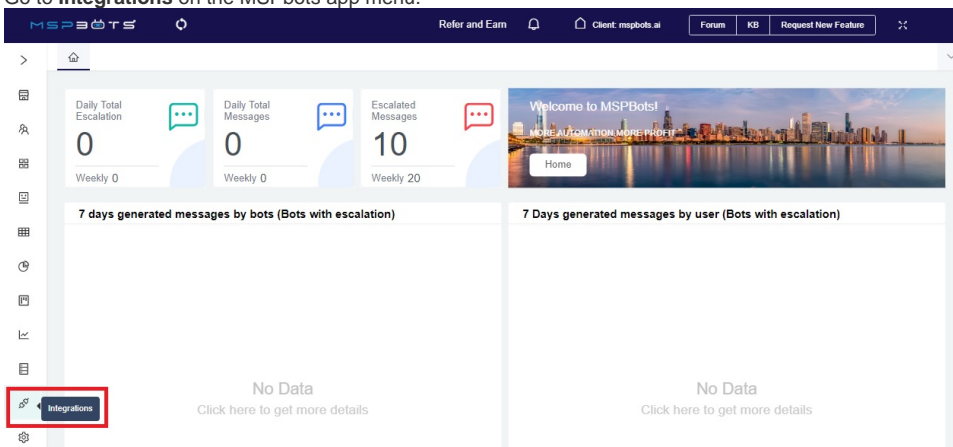


- g. Launch the MSPbots agent and log in using your MSPbots account. You can Minimize or Close the window after login but do not log out.

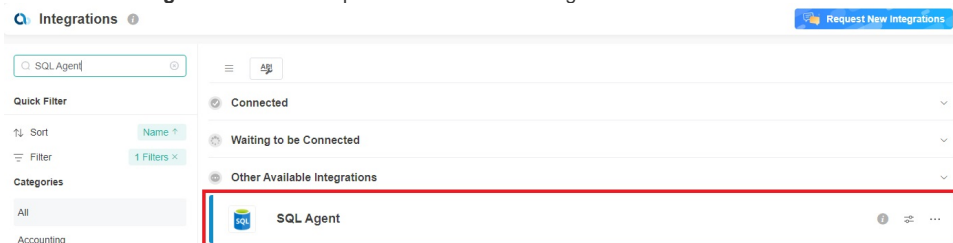


### 3. Set up the MSPbots Agent Connector

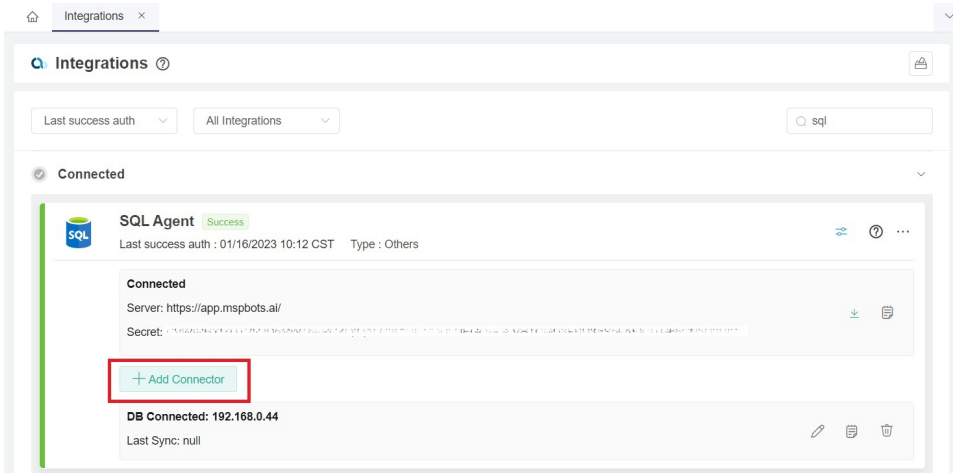
1. Go to **Integrations** on the MSPbots app menu.



2. Search for **SQL Agent** and click it to open the connection settings.



3. Click the **+Add Connector** button.



*The last success auth shows the last time when the MSPbots Agent successfully pulled the database configuration information. By default, this process is set to occur every 5 minutes.*

4. Fill in all of the following required fields. It may take a few moments for the agent to check in after installation.

- **Database Type** - Select either **SQL Server** or **MySQL**.
- **Agent** - The agent will auto-populate with the machine name you installed.
- **IP** - Provide the internal IP address or FQDN of the SQL or MySQL server.
- **Database Name**
- **Time Zone** - Select the time zone used by the connected database.
- **User ID** - This is the username of the user with read-only access to the database.
- **Password** - This is the password of the user with read-only access to the database.

SQL Agent **Success**  
Last success auth: 03/22/2023 12:00 CDT Type: Others

**Connected**  
Server: https://app.mispbts.ai/  
Secret: [REDACTED]

+ Add Connector

**SQL Server** **Connect success**  
DB Type: SQL Server DB Server: sql.rabbitechinc.com Logins Dataset: BG Status User Name: mispbtsapp

Database Type: SQL Server A  
Agent: RAB-AAP-SQL01 B  
IP: sql.rabbitechinc.com Logins C  
Database Name: bgstatus D  
Time Zone: America/Chicago E  
User ID: mispbtsapp F  
Password: ..... G

Save And Sync Delete

If you have installed **multiple MSPbots agents** with different databases in different network segments, you have to select the device name where you manually installed the MSPbots Agent. You can find the device name in the Agent selection box. Select the one under the corresponding gateway of the database.

5. Click **Save And Sync**.

## 4. Create a dataset and validate the data

1. Go to **Datasets** on the MSPbots app menu and click the **New Agent Dataset** button.

MSPBOTS  
Refer and Earn Client: mispbts.ai

Datasets

Sort: Last Modified Filter

Integration Group  
Show all integration  
Chargebee  
ConnectWise Manage

**2**  
New New Agent Dataset

**1**  
Datasets

**ConnectWise Manage Ticket Details**  
Update CW's ticket through Bot  
Linked Bots: 0 Linked Widgets: 1 Custom  
CREATED: 2023/05/31 10:07:30 CST LAST MODIFIED: 2023/05/31 10:07:30 CST LAST SYNCED: OWNER: Set Data Source

**Interview Satisfaction Survey**  
Dataset for Interview Satisfaction Survey  
Linked Bots: 0 Linked Widgets: 1 Custom  
CREATED: LAST MODIFIED: LAST SYNCED: OWNER:

2. When the New window appears, click **Integration** and select **SQL Agent**. Don't forget to fill in the dataset **Name** and **Description** fields.

New

Name

Name

Integration

SQL Agent

E-Automate ON-PERMISE

SQL Agent

Role

Admin +1

Data Source type

SQL Agent

Description

Description

Cancel

Confirm

3. Next, go to the **Data Cleaning** tab to show the Validate SQL section below.

a. Select a database from the **DB** dropdown list.

b. Scroll down to the Validate SQL section, fill in the **SQL field**. The most common SQL statement to use here is "select \* from TABLENAME".

c. Input your desired **Sync Frequency** in minutes.

Sync Frequency is currently limited to 30 minutes and can only be decreased for smaller datasets. For larger datasets, the frequency may be limited due to a large amount of data ingestion and the constraint it would place on both your server and ours.

Default

Fields Description

Data Cleaning

Refresh Type

SQL

DB

Refresh Name

SQL

Please Enter Content, Required field cannot be empty

Validate SQL

Description

Please Enter Content, Required field cannot be empty

Sync Frequency(Mins)

30

Cancel

Confirm

- Click **Confirm** when done. This will show a preview of the data for your validation. You can customize or use the default character length for string-type fields, and the time field can be set with a timezone.

Integration: SQL Agent Role: Admin +1

☒ Remind user to link integration

Dataset Key: [Placeholder]

Validate SQL

opponent Mitt Romney, Obama was sworns

The SQL statement passes validation and the following table will be generated.

| Column      | Timezone               | Length |
|-------------|------------------------|--------|
| ids         |                        |        |
| username    |                        | 305    |
| stats       |                        |        |
| createtime  | Please enter Time Zone |        |
| description |                        | 65585  |
| price       |                        |        |

OK

Cancel Confirm

- Once you confirm the data is correct, click **OK** to create and save the dataset. The data will be synchronized in 10 minutes.

## 5. Save the logs and send the file to MSPbots Support Team

- Open the **MSPbots Agent** client and click the **Save Log** button on the upper right corner of the window.

- Click **Confirm** on the Tips popup that appears.

- Next, select the location to save the logs, provide a filename, and click **Save**.
- Send the file to [support@mspbots.ai](mailto:support@mspbots.ai).

## 6. Related Topics

- Reminders for Connecting to MSPbots via API or SQL Agent
- How to Create a Read-only Account for Your SQL Server or MySQL
- How to Create a Read-Only Account on the MySQL or SQL Server