TD Ameritrade Integration Setup

Setting up a TD Ameritrade integration with MSPbots is done by authorizing TD Ameritrade in MSPbots and configuring the data source.

*This procedure requires TD Ameritrade login. Log in to TD Ameritrade before you start. When prompted to authorize MSPbots to pull data, click **Yes**.*

To set up and connect TD Ameritrade to MSPbots:

1. Log in to the MSPbots dashboard as an administrator.
2. Go to **Integrations** and search for **TD Ameritrade**.
3. Click on **TD Ameritrade** and click the **Sync** button.

4. You will see a message saying that you have successfully linked TD Ameritrade. Click the **Save** button.
5. Test the connection.