

SyncroMSP Integration Setup

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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

① 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

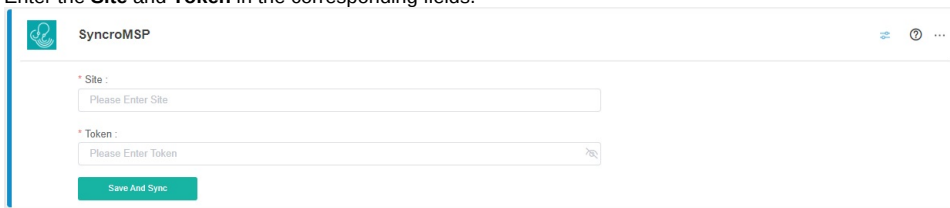
31-08-2020

⚙ 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 MSPbots app and navigate to [Integrations](#) on the menu.
3. On the **Integrations** tab, search for **SyncroMSP** and click it.

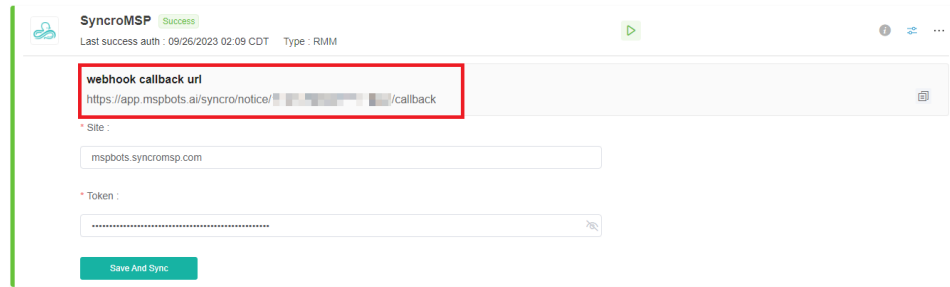
4. Enter the **Site** and **Token** in the corresponding fields.



The screenshot shows the 'SyncroMSP' configuration window. It has two input fields: '* Site :' with a placeholder 'Please Enter Site' and '* Token :' with a placeholder 'Please Enter Token'. Below these fields is a green button labeled 'Save And Sync'.

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**.



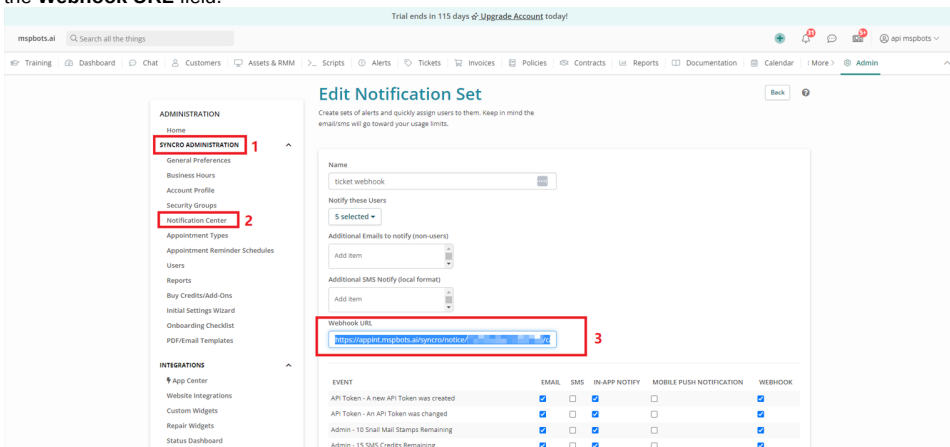
The screenshot shows the 'SyncroMSP' configuration window after successful connection. It displays 'Last success auth : 09/26/2023 02:09 CDT' and 'Type : RMM'. A red box highlights the 'webhook callback url' field, which contains the URL 'https://app.mspbots.ai/syncro/notice/[redacted]/callback'. Below this are the 'Site' and 'Token' fields, and a 'Save And Sync' button.

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.



The screenshot shows the 'Edit Notification Set' page in the MSPbots app. The left sidebar has 'SYNCRO ADMINISTRATION' (1) and 'Notification Center' (2) highlighted. The main content area shows a form with fields for 'Name', 'Notify these Users', 'Additional Emails to notify (non-users)', 'Additional SMS Notify (local format)', and 'Webhook URL' (3). The 'Webhook URL' field contains the URL 'https://app.mspbots.ai/syncro/notice/[redacted]/callback'. Below the form is a table with columns for 'EVENT', 'EMAIL', 'SMS', 'IN-APP NOTIFY', 'MOBILE PUSH NOTIFICATION', and 'WEBHOOK'.

EVENT	EMAIL	SMS	IN-APP NOTIFY	MOBILE PUSH NOTIFICATION	WEBHOOK
API Token - A new API Token was created	☒	☐	☒	☐	☒
API Token - An API Token was changed	☐	☐	☐	☐	☒
Admin - 10 Email Mail Stamps Remaining	☒	☒	☒	☐	☒
Admin - 15 SMS Credits Remaining	☒	☐	☐	☐	☒

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

SyncroMSP - APPOINTMENT-SYNC

API Count

32

Success Count

18

Fail Count

13

Sync Frequency

3600 Seconds

Last successful data acquisition

05/23/2023 12:38 CDT

API - Dataset

SyncroMSP Appointments

API URL

API URL

API List

All

API	Last Sync Time	Status	Action
APPOINTMENT-TYPE-SYNC	05/23/2023 12:38 CDT	Succeeded	
APPOINTMENT-SYNC	05/23/2023 12:38 CDT	Failed	
CONTRACTS-SYNC	05/23/2023 12:39 CDT	Failed	
ESTIMATES-SYNC	05/23/2023 12:39 CDT	Failed	
ITEMS-SYNC	05/23/2023 12:39 CDT	Failed	
LEADS-SYNC	05/23/2023 12:38 CDT	Failed	
LINE-ITEMS-SYNC	05/23/2023 12:40 CDT	Succeeded	
NEW-TICKET-FORMS-SYNC	05/23/2023 12:38 CDT	Succeeded	
PAYMENT-METHODS-SYNC	05/23/2023 12:39 CDT	Succeeded	
PAYMENT-PROFILE-SYNC	05/23/2023 13:20 CDT	Succeeded	

Sync Total

405

Success Count

0

Fail Count

405

Sync History

2023-05-01 - 2023-05-31

All

Client Name: [redacted]

Start Time	Sec	Status
05/23/2023 12:38 CDT	0	Failed
ID:39918138 "appointments": {"error": "Not authorized. Please ask account admin to update your group permissions."} How To Fix: If this error was temporary, you can try resubmitting the run and the issue may have been resolved.		
05/23/2023 11:38 CDT	0	Failed
ID:39908853 "appointments": {"error": "Not authorized. Please ask account admin to update your group permissions."} How To Fix: If this error was temporary, you can try resubmitting the run and the issue may have been resolved.		
05/23/2023 10:38 CDT	0	Failed

Total 405

10/page

<

1

2

3

4

...

41

>

Go to 1

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](#).