

Spectora Version A - Integration Instructions (Last updated: May 11, 2022)

1. In order to create inspections in Spectora when orders are created in Homebase, first navigate to the Team page (<u>https://app.spectora.com/team</u>) and click "Add Staff Member"

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	😥 SPECTORA						Search	everything		۹ 💡		•			
					ADD INSPECT	OR									
	SUPPORT STAFF														
	First Name Last Name	Email	Phone	Schedule?	Edit inspections?	Publish?	Add to template?	Edit template?	Can manage contacts?	Can access financial data?	Admin?				
				\checkmark	\checkmark	\checkmark	\checkmark	~	\checkmark	~	\checkmark	•			
				\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	0			
			Ē	A	DD STAFF MEN	MBER									
		MULTIPLE LOCA	TIONS? FF	RANCH	IISING?										
		Create an organization wi Our Organization Tools al templates, agreements ar	ith multiple comp llow you to view nd automation so	panies, lo metrics a ettings.	cations or fram cross multiple	chises. companie	es and share as	sets betweer	i companies like						
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2. Give the new staff member a first name of "Homebase" a last name of "Integration", and a valid email address. Make a note of the email address you used, then click "Add Staff Member". Homebase will use this Staff Member to add notes to Spectora inspections on your behalf.

First name		0
Homebase	Can schedule new inspections?	0
Last name	✓ Can edit/update inspections?	0
Integration	✓ Can publish reports?	0
Phone	✓ Can add new comments to template?	6
Email (required)	✓ Can edit templates?	
test@example.com	✓ Can manage contacts?	•
✓ Send confirmation link	 Can access financial data? 	0
		0

3. After a moment or two, you should receive an invitation from Spectora sent to the email you entered. Click the "Confirm My Account" link in the email, then enter a password for this account. Make note of this password, as you'll need it in the next step.

Douglas Laurent has invited you to join Spectora!					
Spectora is a home inspection platform for report writing, scheduling, and business automation.					
You can confirm your account email through the link below:					
Confirm My Account					
$\widehat{\mathbf{b}}$					
SPECTORA					

4. Sign in to Homebase and navigate to the Manage screen (<u>https://</u> <u>www.inspectorshomebase.com/Manage/index.html</u>). Scroll down and open the "Spectora Integration" section. Enter the email and password for the Staff Member you just created, then click "Verify Integration".

Spectora Integration	(Image From Homebase Manage Tab)
Integration Type	
 Use Homebase for so With this type of inter When Spectora report 	cheduling and Spectora for reports gration, Homebase creates a new inspection in Spectora each time a new Homebase order is created. ts are published, a new Report URL is added to the Homebase order.
Use Spectora for sch With this type of inter Homebase order is up	neduling and reports gration, a new Homebase order is created each time an inspection is created in Spectora. As the pdated, notes are added to the Spectora order.
(i) Click here to view our	instructions for setting up this type of integration
Email Address	
Email Address	
Password	
Password	
Verify Integration	

5. After a few moments, the "Verification Status" should change to "VERIFIED". If it does not, please click the "Remove Integration" button, double check your credentials, and try verification again. If it continues to fail, please reach out to support@inspectorshomebase.com.

Spec	tora Integration	^
Integr	ation Type	
0	Use Homebase for scheduling and Spectora for reports With this type of integration, Homebase creates a new inspection in Spectora each time a new Homebase order is created. When Spectora reports are published, a new Report URL is added to the Homebase order.	
	Use Spectora for scheduling and reports With this type of integration, a new Homebase order is created each time an inspection is created in Spectora. As the Homebase order is updated, notes are added to the Spectora order.	
i	Click here to view our instructions for setting up this type of integration	
Email Ad	Idress	
doug@	Phomefaxinspections.com	
Verificat	ion Status	
VERIFI	ED	
Rem	ove Integration	

6. Once your Verification Status has changed to "VERIFIED", Homebase will be able to add inspections in Spectora as you create orders in Homebase.