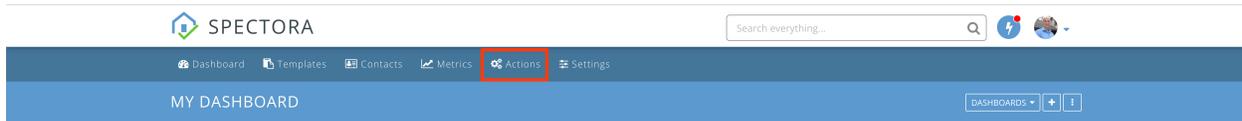


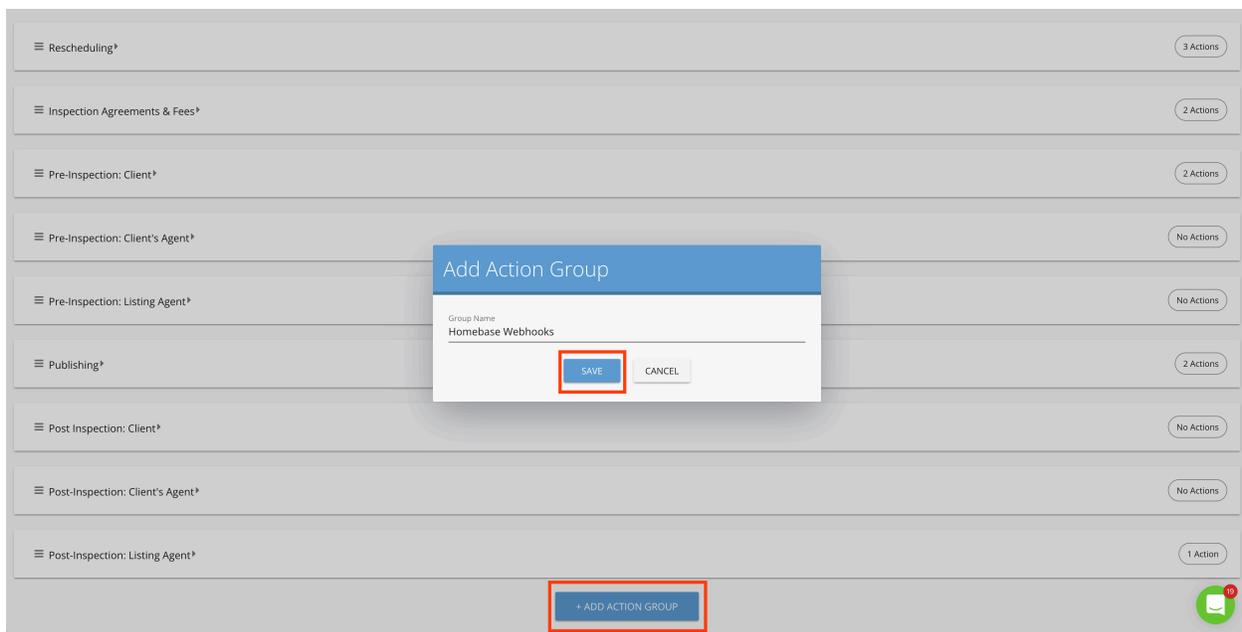


## Spectora Version B - Integration Instructions *(Last updated: May 11, 2022)*

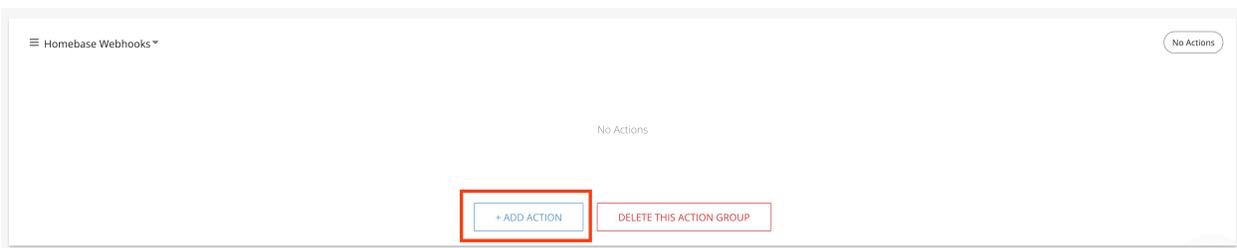
1. Sign in to Spectora and navigate to the “Actions” screen



2. Scroll down and click “+ ADD ACTION GROUP”. Give the action group a name of “Homebase Webhooks” and click “Save”



3. Open the new “Homebase Webhooks” action group and click “+ Add Action”



4. Configure the event to run 0 hours after **Inspection Scheduled**, then click “Next”

1 Choose an Event 2 Add Rules 3 Choose an Action 4 Add Details

0 hours After Inspection scheduled

Only trigger once  
 Send even when notifications disabled  
 Send during certain hours only  
 Do not send on weekends

CANCEL NEXT →

5. We don't need to add any rules, so click “Next” again

1 Choose an Event 2 Add Rules 3 Choose an Action 4 Add Details

Without rules, this Action will happen for EVERY inspection!

+ ADD RULE

CANCEL NEXT →

6. Change the action dropdown to “Call webhook” and click “Next”

1 Choose an Event 2 Add Rules 3 Choose an Action 4 Add Details

Action Name (Optional)

Call webhook

CANCEL NEXT →

7. Copy and paste the webhook URL found on the Homebase Manage screen under “Spectora Integration” into the URL field.

Spectora Integration (Image From Homebase Manage Tab)

[Click here to view our instructions for setting up a Spectora integration](#)

Webhook URL

`https://api.inspectorshomebase.com/Sandbox/spectora?organizationId=organization_7c03b018b13a348747d8bcc3bab19681`

Integrate with Spectora to automatically update orders in Homebase when they are updated in Spectora.

# Spectora

Choose an Event | Add Rules | Choose an Action | **4 Add Details**

Provide details necessary to **Call webhook**

Url  
https://api.inspectorshomebase.com/Sandbox/spectora?organizationId=organization\_7c03b018b13a348747d8bcc3bab19681

Payload  
inspection

CANCEL SAVE

8. Open the Payload dropdown and select all the checkboxes shown below

Choose an Event | Add Rules | Choose an Action | **4 Add Details**

Provide details necessary to **Call webhook**

Url  
https://api.inspectorshomebase.com/Sandbox/spectora?organizationId=organization\_7c03b018b13a348747d8bcc3bab19681

Payload  
inspection property inspectors charges payments buyers buying\_agent selling\_agent event\_details

CANCEL SAVE

9. Repeat steps 4-8 with four additional event types:

- **Service or Addon Added After Scheduling/Confirmation**
- **Service or Addon Removed After Scheduling/Confirmation**
- **Inspection rescheduled**
- **Inspection canceled**

10. You should end up with **5 actions**. Once these actions have been created, Homebase will begin to receive updates when new orders are created and updated in Spectora.

11. In order to add notes in Spectora when changes are made in Homebase, first navigate to the Team page (<https://app.spectora.com/team>) and click "Add Staff Member"

← → <https://app.spectora.com/team>

SPECTORA Search everything...

ADD INSPECTOR

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? |
|------------|------------|------------|------------|-----------|-------------------|----------|------------------|----------------|----------------------|----------------------------|--------|
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ✓         | ✓                 | ✓        | ✓                | ✓              | ✓                    | ✓                          | ✓      |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ✓         | ✓                 | ✓        | ✓                | ✓              | ✓                    | ✓                          | ✓      |

ADD STAFF MEMBER

**MULTIPLE LOCATIONS? FRANCHISING?**  
Create an organization with multiple companies, locations or franchises.  
Our Organization Tools allow you to view metrics across multiple companies and share assets between companies like templates, agreements and automation settings.

GET STARTED

WhatsApp icon

12. 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.

**Add a support staff**

First name  
**Homebase**

Last name  
**Integration**

Phone

Email (required)  
**test@example.com**

Send confirmation link

Can schedule new inspections?

Can edit/update inspections?

Can publish reports?

Can add new comments to template?

Can edit templates?

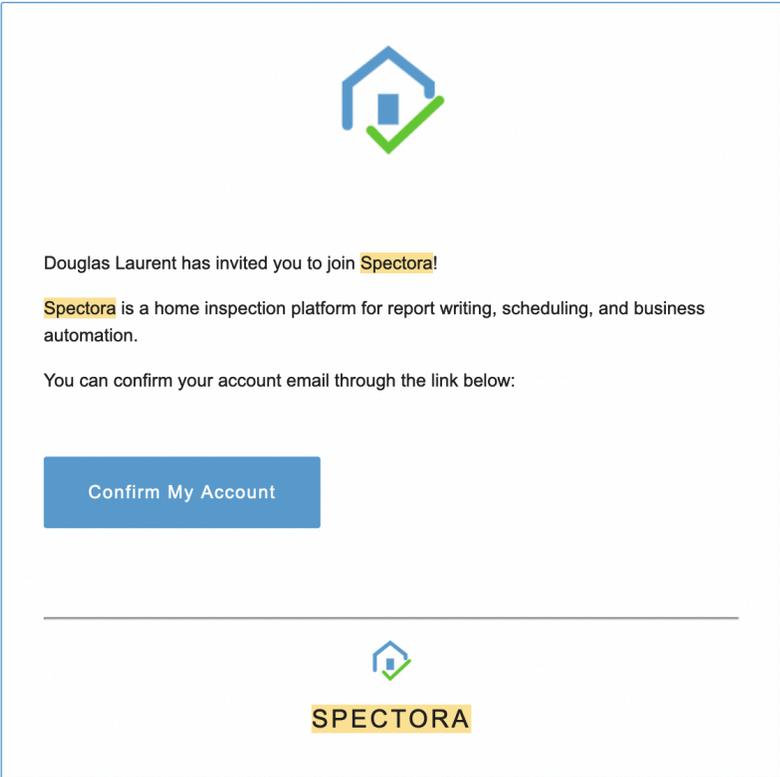
Can manage contacts?

Can access financial data?

Full company admin?

**ADD STAFF MEMBER**

13. 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.



14. Sign in to Homebase and navigate to the Manage screen (<https://www.inspectorshomebase.com/Manage/index.html>). 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 ^

**Integration Type**

**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.

 [Click here](#) to view our instructions for setting up this type of integration

Webhook URL  
`https://api.inspectorshomebase.com/Sandbox/spectora?organizationId=organization_7c03b018b13a348747d8bcc3bab19681`

Email Address

Password

**Verify Integration**

15. 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.

### Spectora Integration ^

**Integration Type**

**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.

[Click here to view our instructions for setting up this type of integration](#)

Webhook URL  
https://api.inspectorshomebase.com/Sandbox/spectora?organizationId=organization\_7c03b018b13a348747d8bcc3bab19681

Email Address  
doug@homefaxinspections.com

Verification Status  
VERIFIED

[Remove Integration](#)

16. Once your Verification Status has changed to “VERIFIED”, Homebase will be able to add notes in Spectora as you update orders in Homebase.