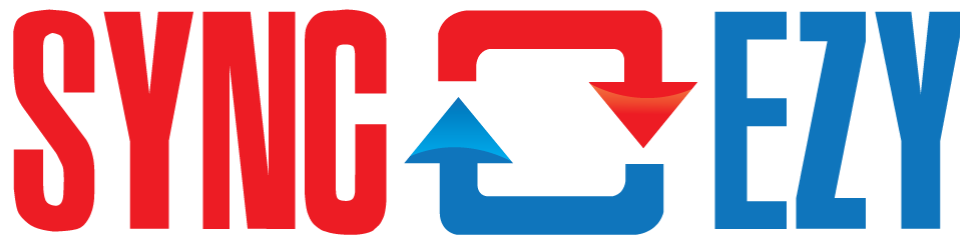


simPRO to SharePoint (One-Way) Integration Overview



Summary

This guide will give a detailed overview of every section and tab that you can find in your simPRO to SharePoint (One-Way) integration.

Details

simPRO

CONNECTED

Disconnect

Reconnect

One Way

SharePoint

CONNECTED

Disconnect

Details Data View Sync Status Configuration Root Folder Reset Credentials FAQ More


Details

simPRO URL

Company ID

SharePoint Storage File

Auto Generate Text File

Integration Name*
 

Notification Emails:

simPRO-URL

This is the URL of your connected simPRO account.

Company ID

This is the connected simPRO company Id.

SharePoint-Storage-File

This is the selected SharePoint site where data will be stored from simPRO.

Auto Generate Text File

Enabling these toggles will automatically convert simPRO job/site/quote to a text file and save it into SharePoint folder location for better search and discoverability.

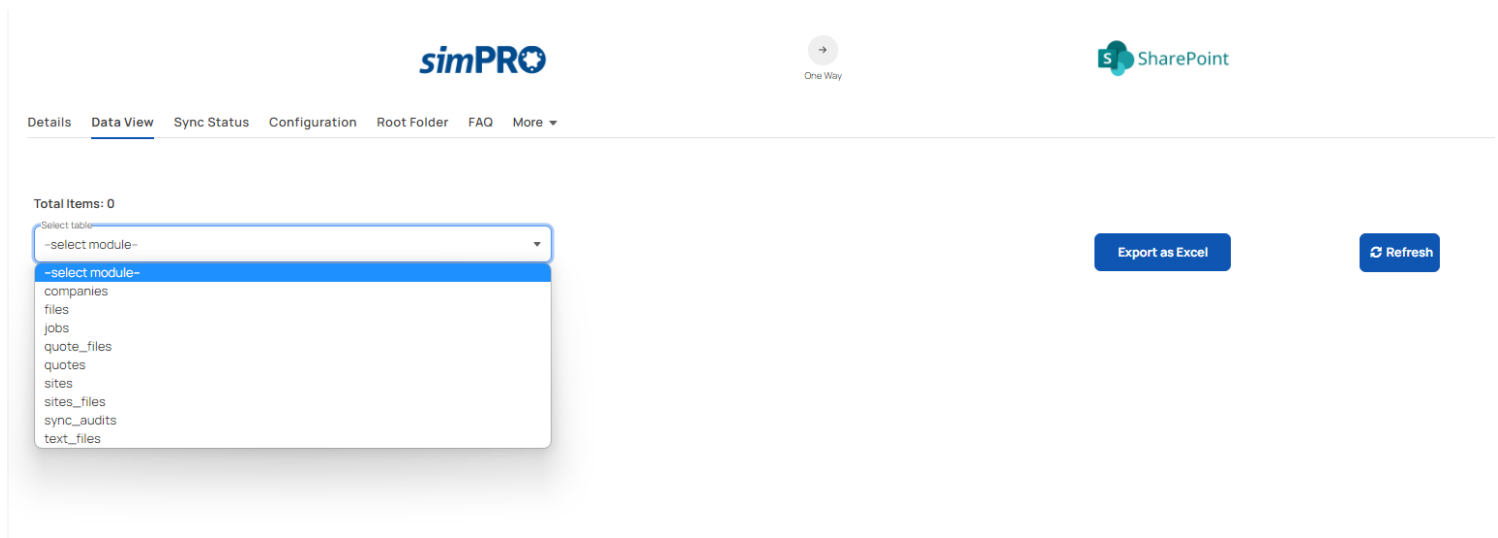
Integration Name

This setting is to give a custom name to your integration. Click on the pencil icon to edit and click save when you are done. You can enter 70 characters maximum.

Notification Emails

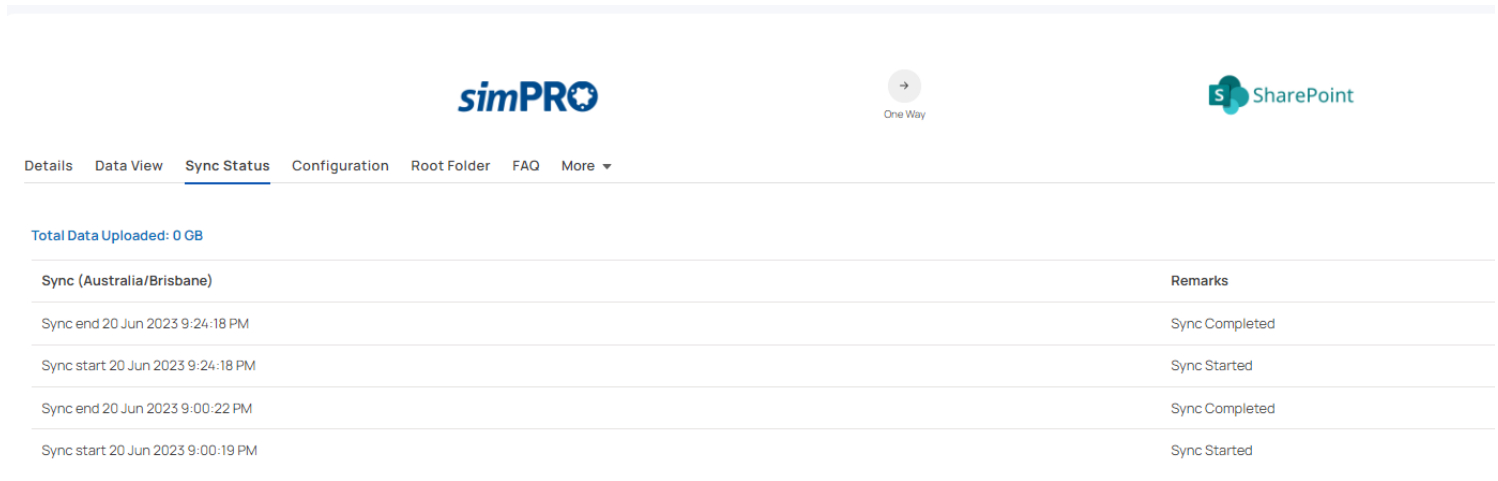
That is where you enter the email to receive notifications about your sync status. You can change it or add multiple emails (separate each email with a comma).

Data View



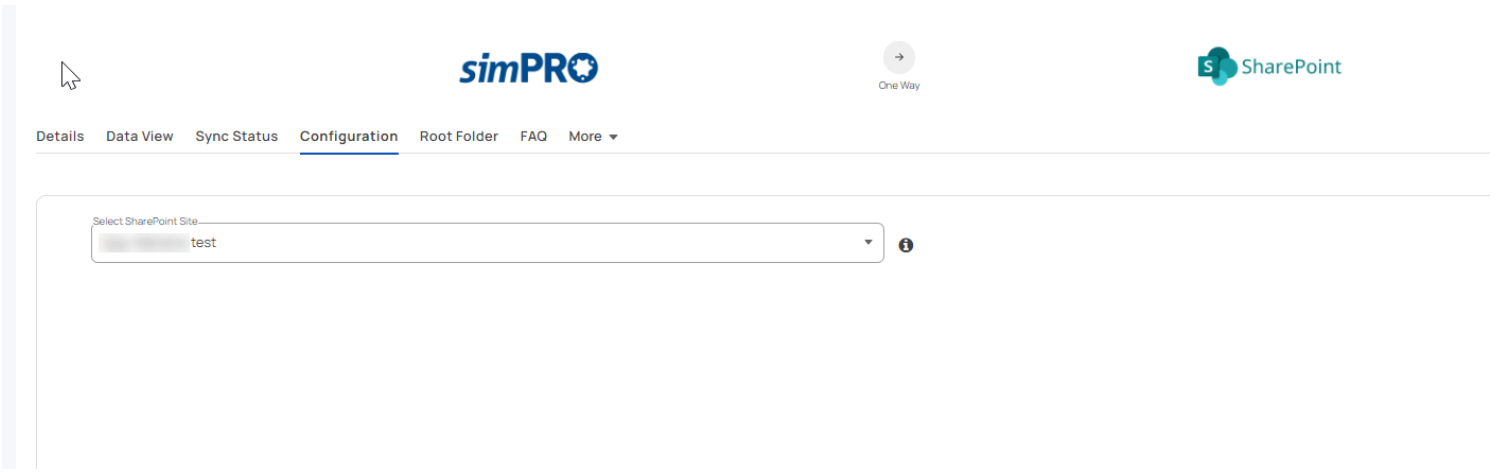
In the Data view tab, you can view data related to the simPRO to SharePoint sync. You can also export them as an Excel spreadsheet.

Sync Status



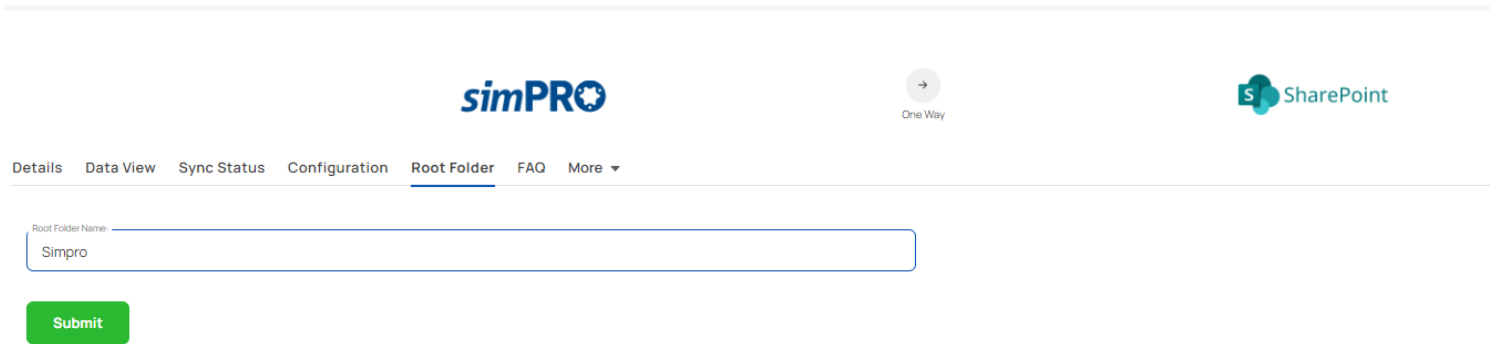
In this tab, you can view the sync status - success or failure. The sync runs everyday and you will be able to see when it starts and when it completes.

Configuration



In this tab, it will allow you to choose the SharePoint Site from the drop down menu where you would like to sync Job/quote/Site data. The integration will create a separate library to sync the data within the chosen site.

Root Folder



This is the (Library)folder name where your data will be synced in SharePoint. You can rename the root folder (Library name) in which all the data is syncing.

Plan Details

Customer Name	Customer Email
Plan Name	Plan Code
Plan Price	Interval of Subscription
Interval-Unit of Subscription	Next Bill Date
Subscription Status	Subscription id
Subscription Number	SyncEzy App ID

The Plan Details tab is a summary of your current subscription status. Below is a brief explanation of each text box.

Customer Name

This is the name you signed up with on the integrations portal.

Customer Email

This is the email you signed up with on the integrations portal

Plan Name

This will always be the Integration name you purchased.

Plan Code

This is the code we use internally and it is related to the plan name.

Plan Price

This will show the amount you paid for the integration, depending on the plan tier and how long you have chosen to subscribe for.

Interval of Subscription and Interval - unit of subscription

These two fields are related and specify how many months or years you have opted to subscribe for.

Next Bill Date

This field specifies the next date you will be billed for the subscription.

Subscription Status

This field specifies whether your integration is live/trial or in other status.

Subscription ID and Subscription Number

These two fields are the references to your subscription. If you have any issues with your subscription, you can give either of these to SyncEzy's support team to help you check.

FAQ

The FAQ tab is a button that will link you to the simPRO to OneDrive [FAQ](#) document.

Have a support question?

We offer three support channels:

Chat - Live Chat (24x5 support) from within your [integration portal](#).

Phone - #1 for Support

AUS: +61 2 9136 9448

NZ: +64 9 303 2999

UK: +44 203 670 1109

US: +1 720 500 9302

Email - support@syncezy.com