

HaloPSA Integration

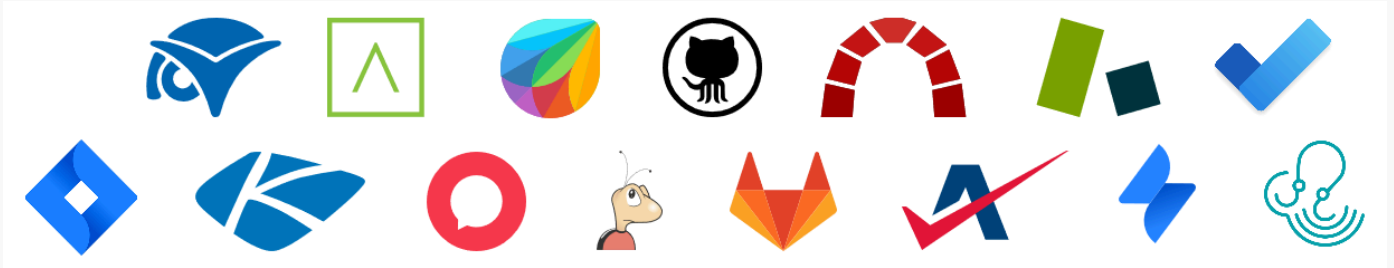


CHECKCENTRAL



BINARYFORTRESS

HaloPSA Integration



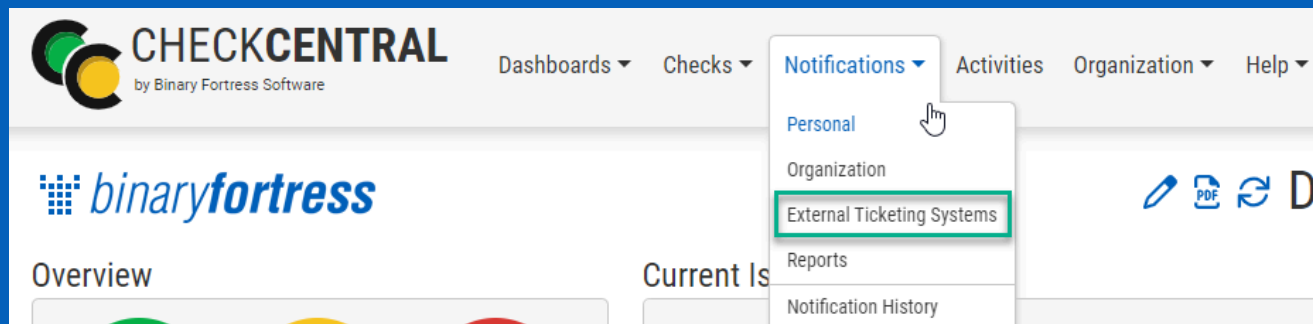
CheckCentral integrates with several RMMs, PSAs, and ticketing software, including HaloPSA, helping you consolidate service ticket issues.



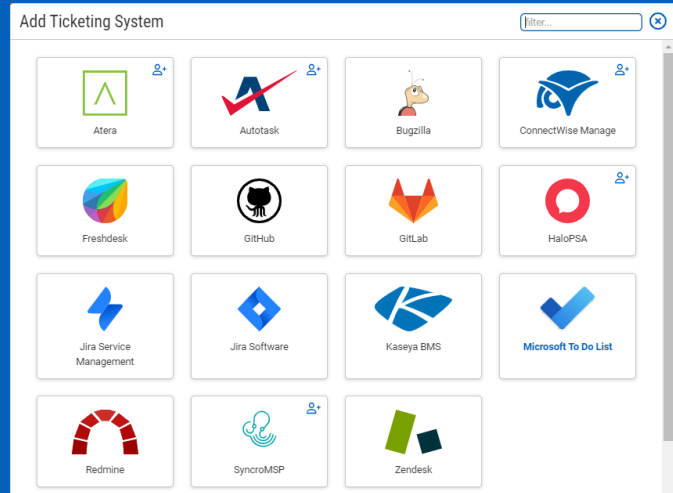
To integrate HaloPSA with CheckCentral, begin by logging into your CheckCentral account.

CheckCentral

From the main menu, click Notifications, then External Ticketing Systems.



Click Add Ticketing System and choose HaloPSA.



This will bring up the configuration options required for CheckCentral to communicate with HaloPSA servers via the API.

HaloPSA

Name: HaloPSA

Resource Server:
Click the 'Configuration' gear on the left-hand sidebar.
Click 'Integrations' then 'HaloPSA API'.
Copy and paste 'Resource Server', 'Authorisation Server', and 'Tenant' below.

Authorisation Server:
See the instructions under 'Resource Server'.

Tenant:
See the instructions under 'Resource Server'.

Client ID:
Click the 'Configuration' gear on the left-hand sidebar.
Click 'Integrations', then 'HaloPSA API', then 'View Applications'.
Click the 'New' button in the top-right corner.
On the Details tab:
• Enter an 'Application Name' and select 'Client ID and Secret (Services)' for the 'Authentication Method'.
• Copy and paste 'Client ID', 'Client Secret' below.
• Select 'Agent' for the 'Login Type' then select an agent to login as.
On the Permissions tab:
• Make sure 'read:tickets', 'edit:tickets', 'read:customers', 'read:assets' are checked.
• Click the 'Save' button to complete the setup.
User agent required permissions:
• Click the 'Configuration' gear on the left-hand sidebar.
• Click 'Teams & Agents', then 'Agents', then click on the agent's name you selected above for your API integration.
• Click the 'Edit' button near the top-left, then click the 'Permissions' tab.
• Make sure 'Tickets Access Level' is set to 'Read and Modify'.
• Click the 'Save' button near the top-left.

Client Secret:
See the instructions under 'Client ID'.

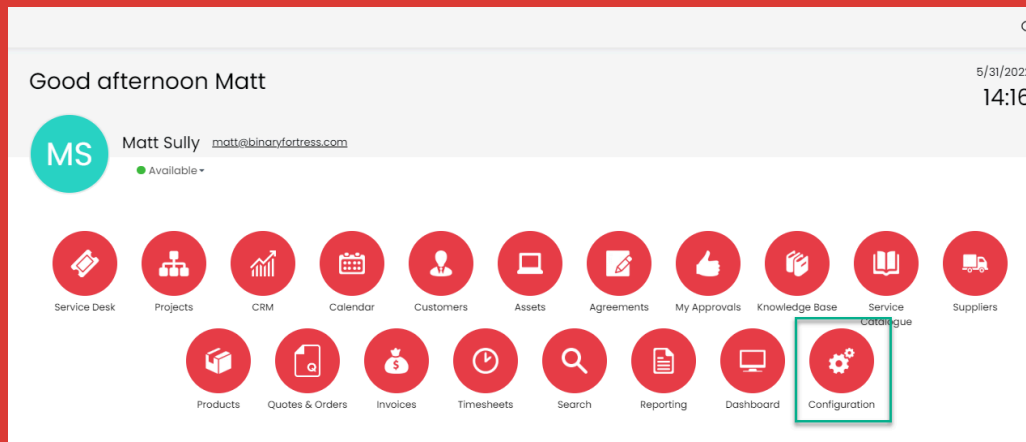
Ticket Type: Search

Save Close

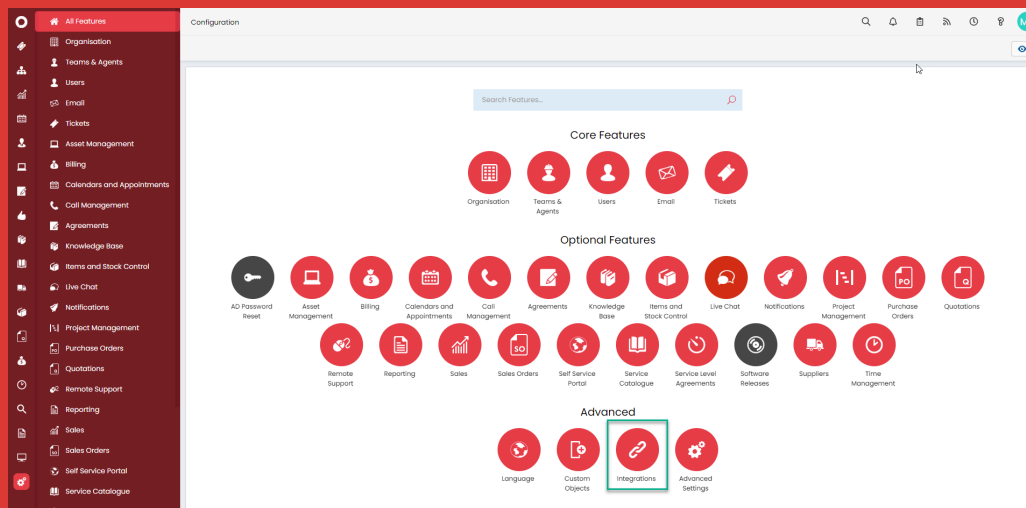
You can name this configuration anything you'd like.

The other details require you to log into your HaloPSA account.

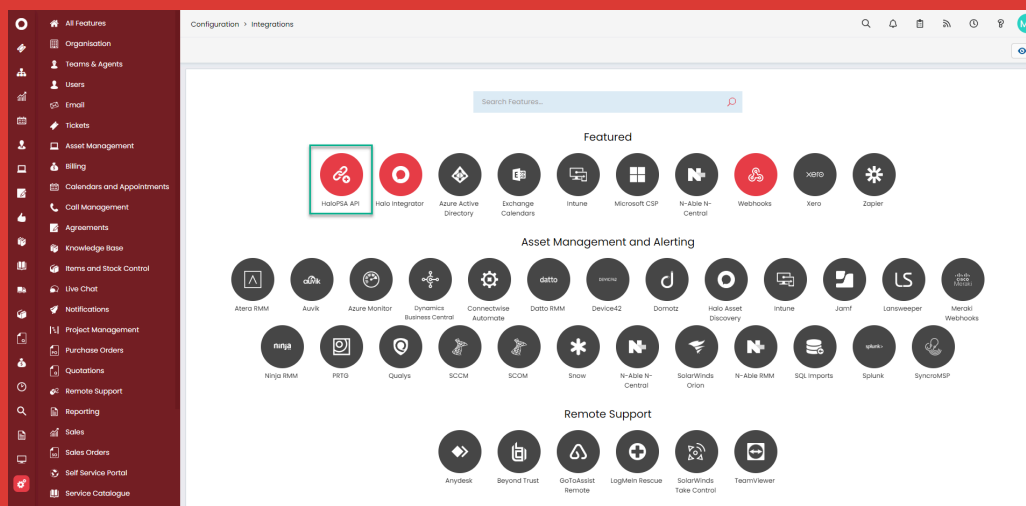
Halo



Click Configuration.



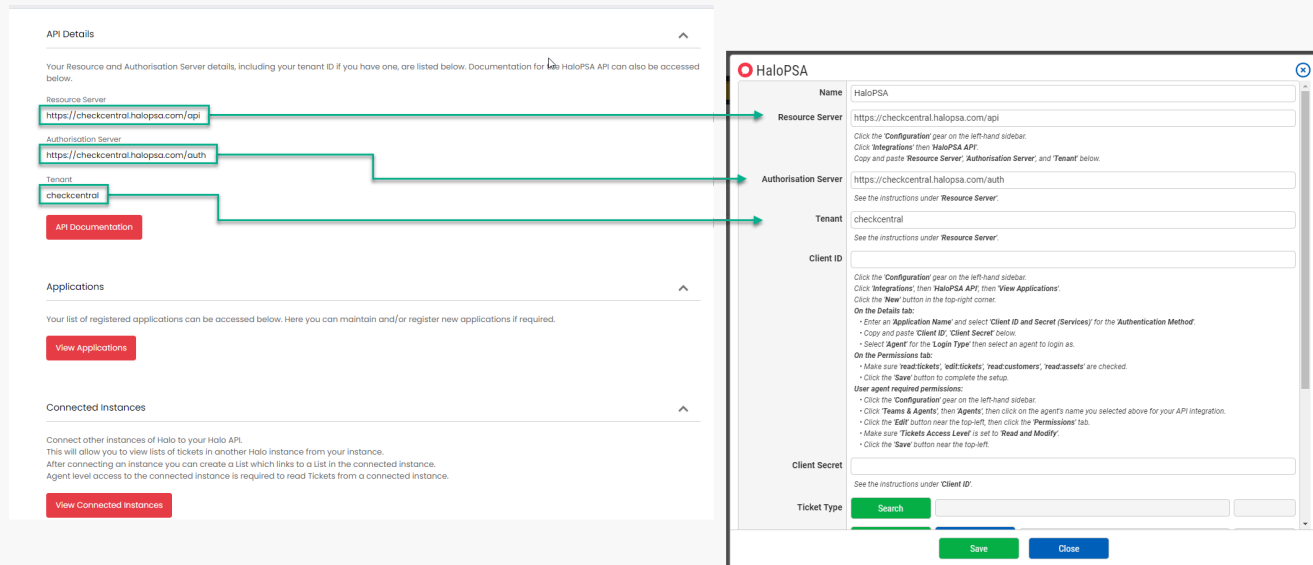
Click Integrations.



Click HaloPSA API.

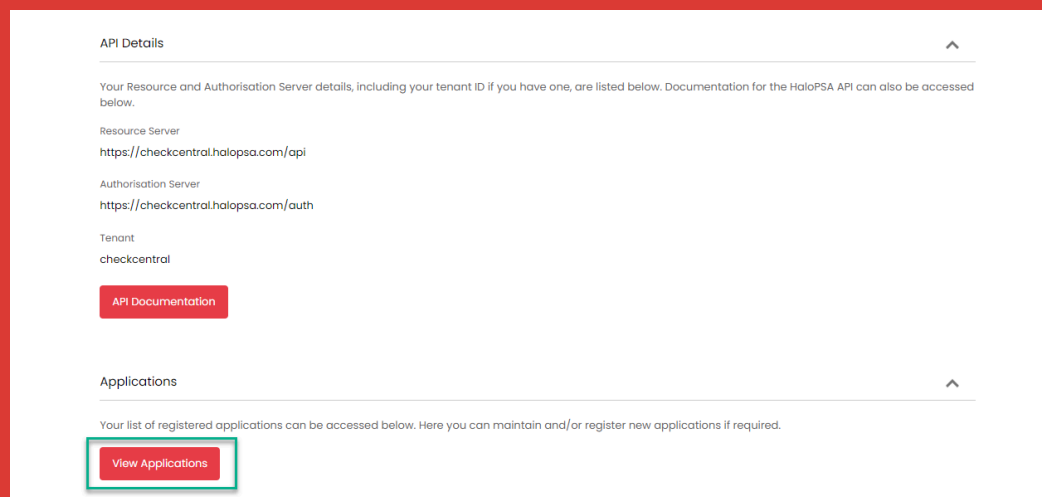
Both

Here you can copy your Resource Server, Authorization Server, and Tenant details, pasting each into the proper fields of the CheckCentral configuration window.

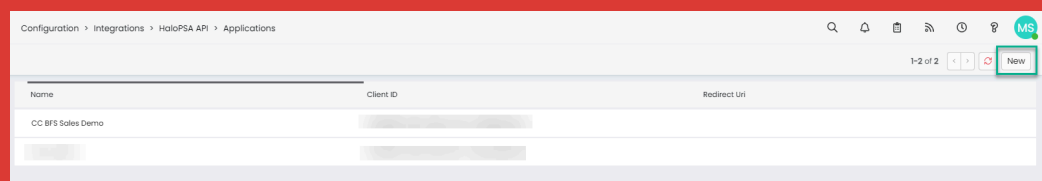


Halo

The remaining information is in Halo's Applications area. From the HaloPSA API screen, click View Applications.

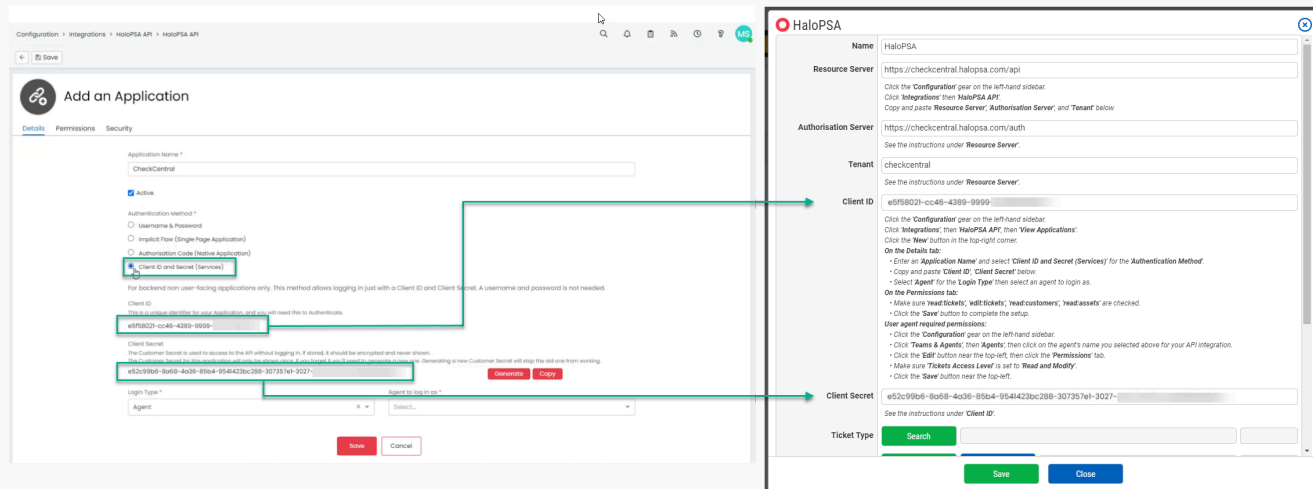


Click New.



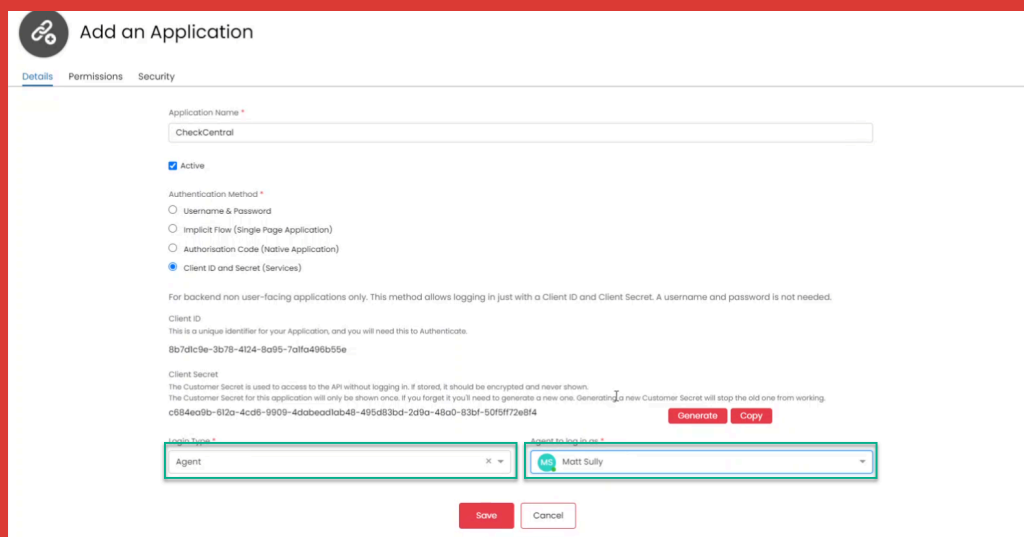
Both

In the Details tab you'll create new API credentials for CheckCentral. Select Client ID and Secret Services for the Authentication Method, then copy the Client ID and Client Secret details, pasting them in the proper fields of the CheckCentral configuration window.



Halo

Back in Halo, Select Agent as the login type, then choose the desired agent. This is the agent whose login will be used in association with this API application, though an alternative agent can be chosen for future tickets created via CheckCentral.



Now move to the tab labeled Permissions. Ensure Read Tickets, Edit Tickets, Read Customers, and Read Assets are enabled. Scroll down and click Save.

Configuration > Integrations > HaloPSA API > HaloPSA API

← Save

Add an Application

Details **Permissions** Security

These permissions define what features this application can access. These must be specified in the 'scope' parameter of any authentication request.

☐ all
Enabling this permission will give this application all permissions. The application will be able to do everything that the Agents permissions allow.

☐ admin

☒ readtickets

☒ edittickets

☐ readcalendar

☐ editcalendar

☒ readcustomers

☐ editcustomers

☒ readassets

☐ editassets

☐ accesschat

☐ accessadpasswordreset

Save Cancel

Still in the Configuration window of HaloPSA, click Teams and Agents, then Agents. Click on the same agent's name chosen earlier.

Configuration > Teams & Agents > Agents

Active Agent accounts 12 of 10 licences used

1-12 of 12 New Invite XLS Import

Username	Email Address	Job Title	Roles	Default Team	Last Login Date
Jackobury	jackobury@binaryfortress.com	IT Manager	Administrator	1st Line Support	6/16/2022 14:37
Robert Smith		Sales Manager	Sales Executive	Sales	4/26/2022 03:42
Jennifer Williams		Project Consultant	Project Consultant	Project Consultants	
Amir Said		Support Engineer	1st Line Support	1st Line Support	
Mary Johnson		Project Manager	Project Manager	Project Managers	
Patricia Jones		Senior Support Engineer	2nd Line Support	2nd Line Support	
Ken Yang		Infrastructure Engineer	Infrastructure, Project Consultant	Infrastructure	
James Johnson		Account Manager	Account Manager	Sales	
Kerry East		Finance Manager	Finance	Sales	
James Brown		HR Manager	Human Resources	Human Resources	
Matt Sully	matt@binaryfortress.com		Administrator		6/16/2022 14:10
checkcentral@	test@binaryfortress.com		1st Line Support	1st Line Support	

Click Edit near the top-left.

Configuration > Teams & Agents > Agents

← Edit Change profile picture Clone this Agent Account Delete

MS Matt Sully

Details Activity Preferences Departments & Teams Qualifications Permissions

Account Details

Username
Matt Sully

Email Address
matt@binaryfortress.com

Password

Two Factor Enabled
No

Status
Available

Roles
Administrator

Account Active
Yes

Then click the Permissions tab.

Configuration > Teams & Agents > Agents

← Save Change profile picture Clone this Agent Account Delete

MS Matt Sully

Details Activity Preferences Departments & Teams Qualifications Permissions

Tickets Access Level
Read and Modify X

Customers Access Level
Read and Modify X

CRM Access Level
Read and Modify X

Inherited from Role "Administrator"

Assets Access Level
Read and Modify X

Can change whether Suppliers/Customers/sites/Users are active or inactive
Yes X

Inherited from Role "Administrator"

Save Cancel

Once here, ensure Tickets Access Level, Customers Access Level, and Assets Access Level are set to Read and Modify, then scroll down and click Save.

CheckCentral

Return to the CheckCentral configuration window to finish.

The screenshot shows the HaloPSA configuration window with three pop-up windows open. The 'Get Ticket Type' window on the left lists various ticket types such as 'Administrator Rights Request', 'Alert', 'Change Request', 'CheckCentral Notification', 'Desktop Request', 'Hardware Collection Request', 'Incident', 'Laptop Request', 'Leaver Request', 'Mobile Phone Request', 'Network Request', 'New Starter Request', 'Opportunity', 'Other Hardware', 'Peripherals Request', 'Print Services Request', 'Problem', 'Project', 'Quick Quote', 'Quick Time', 'Scheduled Task', 'Service Request', 'Shared Drive Access Request', 'Software Change', and 'Software Request'. The 'Get Ticket Status' window on the right lists status options like 'Action Required', 'Approved', 'Awaiting Approval', 'Closed', 'Closed Item', 'Closed Order', 'Completed', 'In Progress', 'Invoiced', 'New', 'On Hold', 'Open Item', 'Open Order', 'Rejected', 'With CAB', 'With Supplier', and 'With User'. The 'Get Ticket Agent' window on the right lists agents including 'Amir Said', 'checkcentralapi', 'James Brown', 'James Johnson', 'Jennifer Williams', 'Jackabury', 'Ken Yang', 'Kerry Last', 'Mary Johnson', 'Matt Smith', 'Patricia Jones', 'Robert Smith', and 'Unassigned'. The main HaloPSA window has fields for 'Client Secret' (c44598ea-25e5-4088-958d-24548005b9cc-4932897a), 'Ticket Type' (with a 'Search' button), 'Ticket Status' (with 'Search' and 'Clear' buttons), 'Ticket Agent' (with 'Search' and 'Clear' buttons), 'Customer' (with 'Search' and 'Clear' buttons), and 'Check Groups' (with a checkbox for 'All Check Groups' and a 'Save' button).

With the API configuration details added, you can now select the Ticket Type, Ticket Status, and Ticket Agent that will be used to manage tickets in HaloPSA. Click on the Search button to bring up relevant lists and choose one from each list.

The screenshot shows the HaloPSA configuration window with the 'Get Customer' pop-up window open. The 'Get Customer' window on the left lists customer options such as 'Automatically select customer based on check group name', 'Acme's Finest', 'Acorn Construction', 'Canada Syrup Company', 'Number One MSP', 'Top Notch', and 'World Computers'. The main HaloPSA window has fields for 'Client Secret' (c44598ea-25e5-4088-958d-24548005b9cc-4932897a), 'Ticket Type' (with a 'Search' button), 'Ticket Status' (with 'Search' and 'Clear' buttons), 'Ticket Agent' (with 'Search' and 'Clear' buttons), 'Customer' (with 'Search' and 'Clear' buttons), and 'Check Groups' (with a checkbox for 'All Check Groups' and a 'Save' button).

For customers, you can select specific customers or set the channel to automatically select the customer based on the Check Group name.

• Select 'Agent' for the 'Login Type' then select an agent to login as.

On the Permissions tab:

- Make sure 'read:tickets', 'edit:tickets', 'read:customers', 'read:assets' are checked.
- Click the 'Save' button to complete the setup.

User agent required permissions:

- Click the 'Configuration' gear on the left-hand sidebar.
- Click 'Teams & Agents', then 'Agents', then click on the agent's name you selected above for your API integration.
- Click the 'Edit' button near the top-left, then click the 'Permissions' tab.
- Make sure 'Tickets Access Level' is set to 'Read and Modify'.
- Click the 'Save' button near the top-left.

Client Secret

c44598ea-25e5-4d88-958d-24548005b9cc-4932897a

See the instructions under 'Client ID'.

Ticket Type

Search

Ticket Status

Search

Clear

Ticket Agent

Search

Clear

Customer

Search

Clear

Check Groups

☒ All Check Groups

select an item (optional)

☒

Select check groups to use with this channel.

☒ Enable this external ticketing system

To enable this service for all checks in the selected check groups, use the ☒ icon after saving.

Save

Finally, choose which Check Groups will use this HaloPSA ticketing channel. By default, all check groups are selected. To be more selective, disable the All Check Groups checkbox then use the multi-select dropdown field below. Once you've selected your check groups, ensure the 'Enable this external ticketing system' checkbox is enabled, and click Save.

Dashboard ▾
Checks ▾
Notifications ▾
Activities
Organization ▾
Help ▾

Account ▾

Settings

Check Groups

+ Add Ticketing System
Collapse All
Expand All

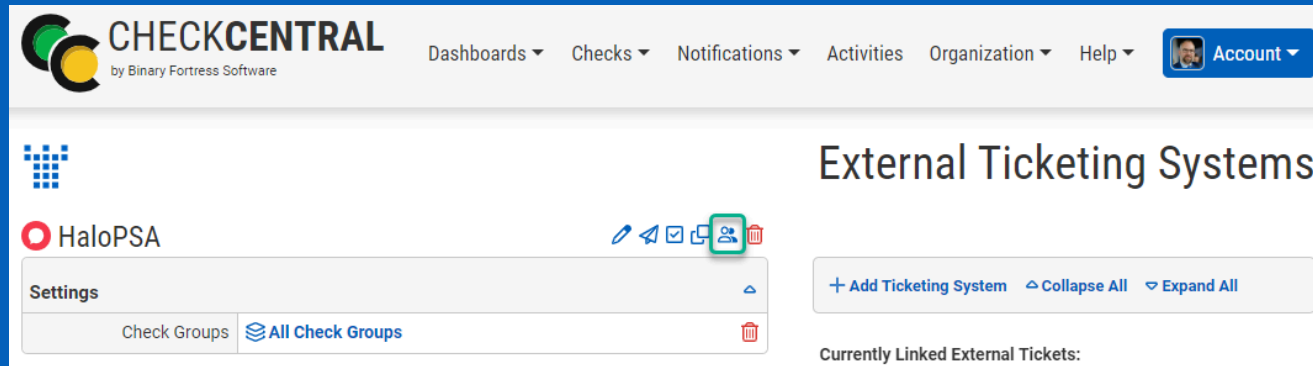
Currently Linked External Tickets:

This External Ticketing System channel will now be available for use with any check under your Check Central account.

Import Customers as Check Groups

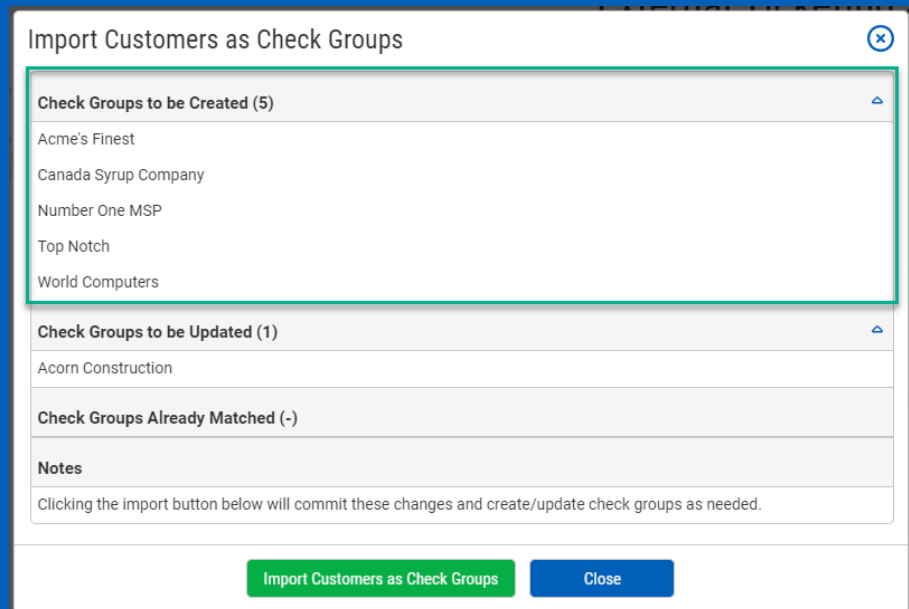
CheckCentral

To create and match customer-centric check groups, we'll use this new API connection to import customers directly from HaloPSA.



From the External Ticketing Systems page, click on the Customer Import icon above your newly-created channel.

If no similar check groups exist, your customers will be listed under Check Groups to be Created.



If you've already created Check Groups using customer names, they will display in the Check Groups to be Updated section, ensuring they match with Halo.

Existing Groups Already Matched with Halo will be skipped.

Now click Import Customers as Check Groups to complete the import.

Import Customers as Check Groups

Check Groups to be Created (5)

Acme's Finest
Canada Syrup Company
Number One MSP
Top Notch
World Computers

Check Groups to be Updated (1)

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import Customers as Check Groups

Close

Import Customers as Check Groups

Check Groups to be Created (5)

Acme's Finest
Canada Syrup Company
Number One MSP
Top Notch
World Computers

Check Groups to be Updated (1)

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import Customers as Check Groups

Close

Import Customers as Check Groups

Check Groups to be Created (5)

Acme's Finest
Canada Syrup Company
Number One MSP
Top Notch
World Computers

Check Groups to be Updated (1)

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import Customers as Check Groups

Close

Asset ID Integration

CheckCentral

Checks within each Check Group can be directly tied to a Halo asset.

The screenshot shows the 'Identification' tab of the CheckCentral interface. It includes fields for Name, Assign to Group, Label, Description, and Asset ID. The 'Asset ID' field is highlighted with a green box. To the right, there is explanatory text for each field.

Identification
Provide a name and other identifying details for the new check.

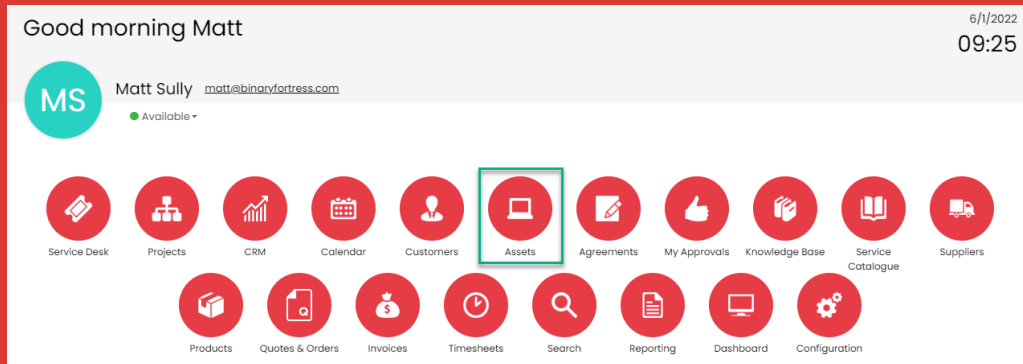
Name
The name assigned to the check. This name will be displayed on the CheckCentral dashboard and in notifications you receive from CheckCentral.

Assign to Group
Groups can be used to organize your checks. Select your desired group from the drop-down menu, or use the 'Add Check Group' link to create a new group.

Label (optional)
An optional label to organize this check. Checks with the same

To create this association, look for the Asset ID field when creating or editing a Check.

Halo



To find this ID in Halo, go to the Home screen or side navigation bar and click Assets.

The screenshot shows the 'Assets' page in Halo, specifically for 'Laptops/Workstations'. A table lists assets with columns for Customer, Site, Asset Type, Asset Number, Status, Key Field, Key Field 2, and Key Field 3. The 'Asset ID' field is highlighted in the table.

Customer	Site	Asset Type	Asset Number	Status	Key Field	Key Field 2	Key Field 3
Acorn Construction	Main	Laptop	4CE0460D00	Not Ready	Lenovo ThinkStation P500	4CE0460D00	800.00

Both

The screenshot shows two side-by-side panels. The left panel displays an asset profile for '4CE0460D0G' (Laptop). The 'Asset Number' field is highlighted with a green box. A green arrow points from this field to the 'Asset ID' field in the right panel. The right panel shows the 'Identification' tab of a check configuration form. The 'Asset ID' field is also highlighted with a green box and contains the value '4CE0460D0G'. Other fields in the form include 'Name' (Acorn Construction), 'Assign to Group' (Acorn Construction), 'Label' (Veeam), and 'Description'.

Click on the target Asset, copy its Asset Number, and paste it into the Asset ID field in Check Central.

CheckCentral

This screenshot shows the 'Identification' tab of the check configuration form. The 'Name' is 'Acorn Construction', 'Assign to Group' is 'Acorn Construction', 'Label' is 'Veeam', and 'Asset ID' is '4CE0460D0G'. The 'Save' button in the top right corner is highlighted with a green box.

This screenshot shows the 'Matching' tab of the check configuration form. It contains sections for 'Existing Messages' with checkboxes for 'Process unmatched messages after saving' and 'Process matched messages after saving'. There is also a section for 'Process matched messages after saving' with a description. At the bottom, the 'Save Check' button is highlighted with a green box.

With all other Check configurations completed, click the Save tab and click Save Check.

When a check is configured to use HaloPSA, such as a backup software job that failed to run, a ticket will automatically be created in your HaloPSA Service Desk. A subsequent warning or failure for the same check will update the open ticket. If that same check returns successful, the open ticket will automatically be closed.

About CheckCentral

CheckCentral Monitoring consolidates and simplifies backup, system, and software email updates into a clean, graphical dashboard, bringing peace of mind to IT administrators of SMBs, Enterprises, and MSPs.

To learn more about CheckCentral, visit: <https://www.checkcentral.com>

About Binary Fortress Software

Binary Fortress has spent 17 years in pursuit of one goal: create software to make life easier. Our software ranges from display management and system enhancement utilities to monitoring tools and digital signage. IT administrators, professional gamers, coffee-shop owners, and MSPs all rely on Binary Fortress to make their days better, and their lives easier.

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