

HaloPSA Integration

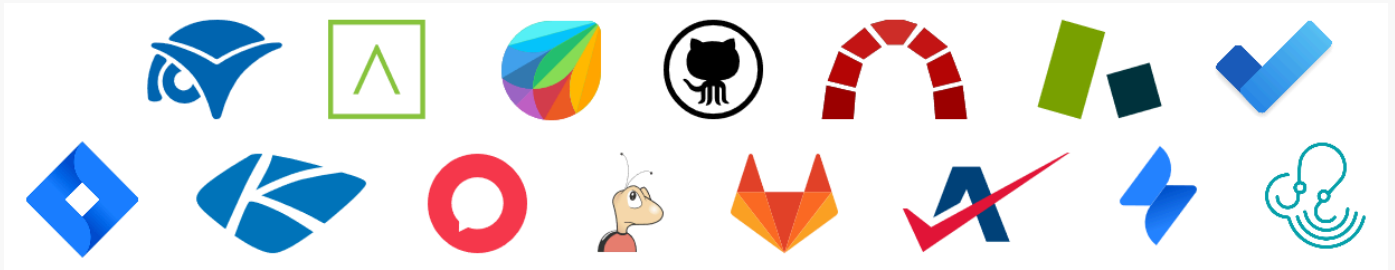


CHECKCENTRAL



BINARYFORTRESS

HaloPSA Integration



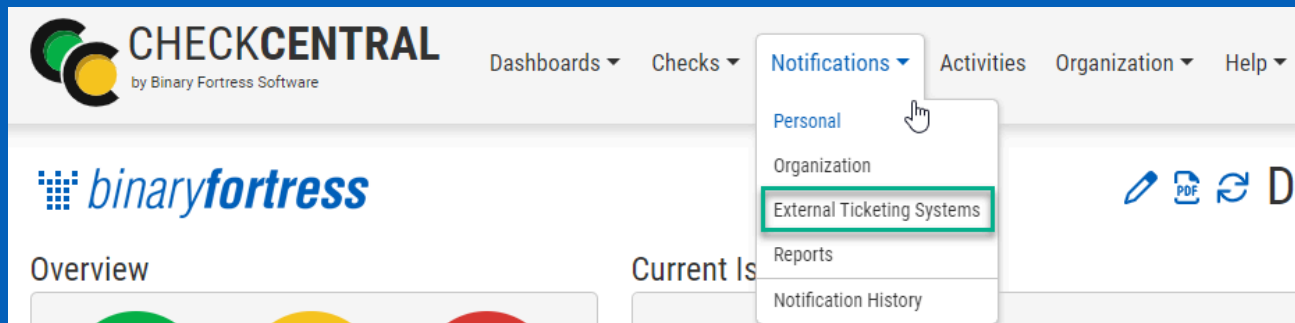
CheckCentral integrates with several RMMs, PSAs, and ticketing software, including HaloPSA, helping you consolidate service ticket issues.



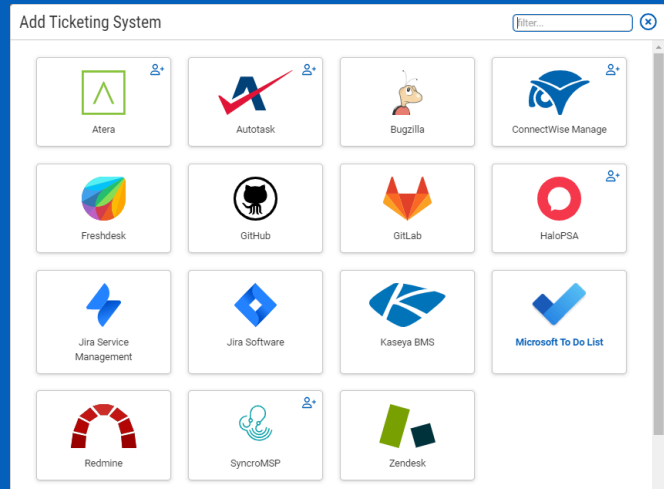
To integrate HaloPSA with CheckCentral, begin by logging into your CheckCentral account.

CheckCentral

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



Click Add Ticketing System and choose HaloPSA.

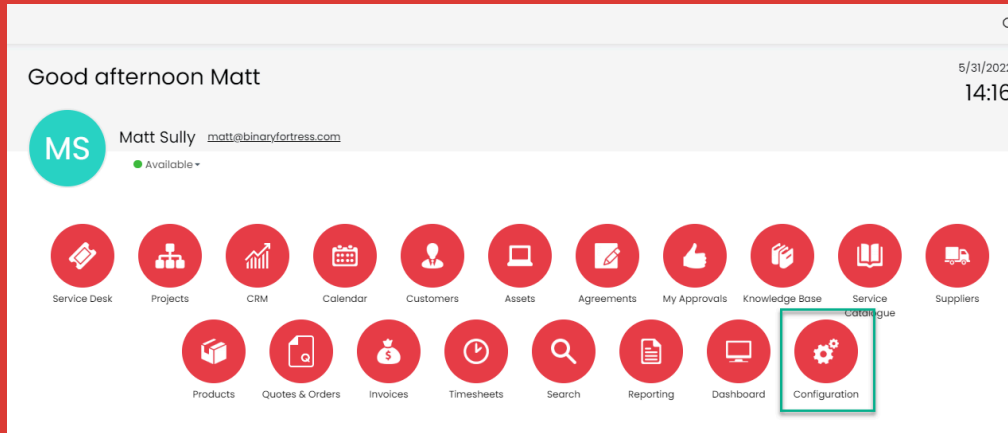


This will bring up the configuration options required for CheckCentral to communicate with HaloPSA servers via the API.

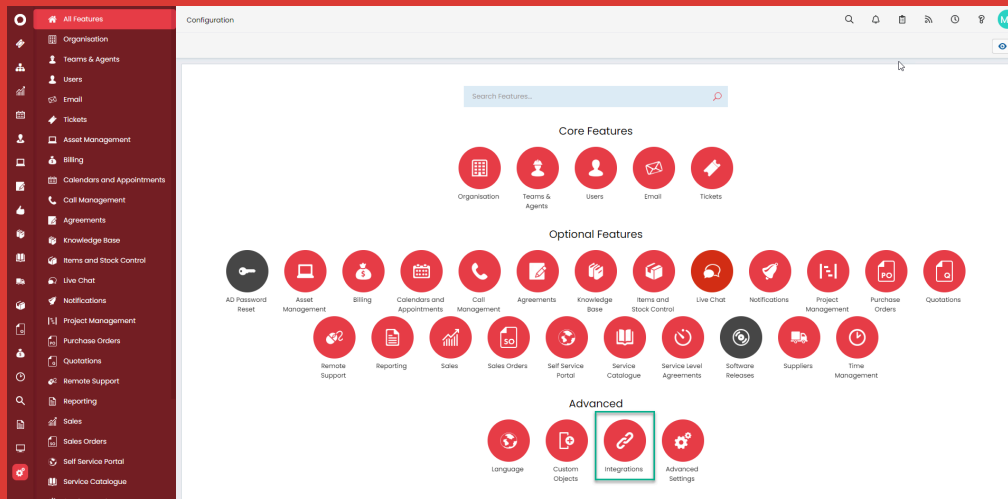
You can name this configuration anything you'd like.

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

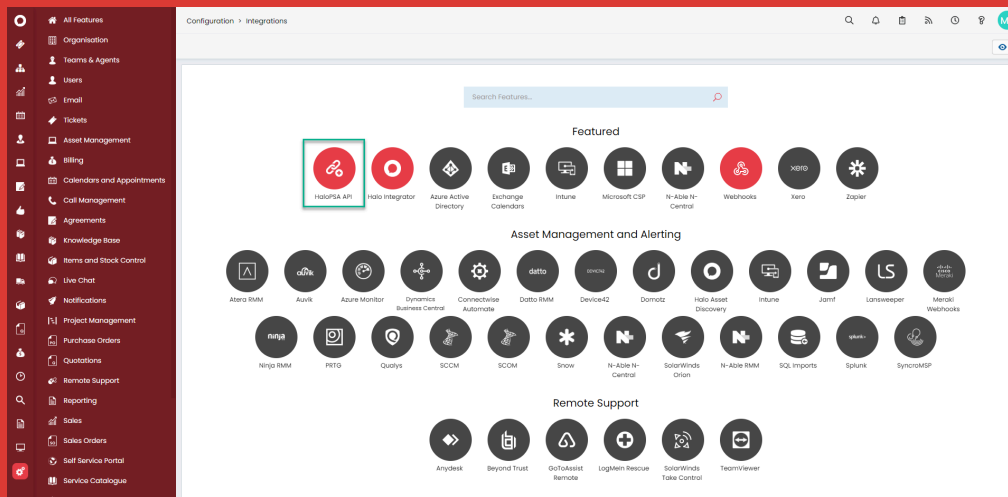
Halo



Click Configuration.



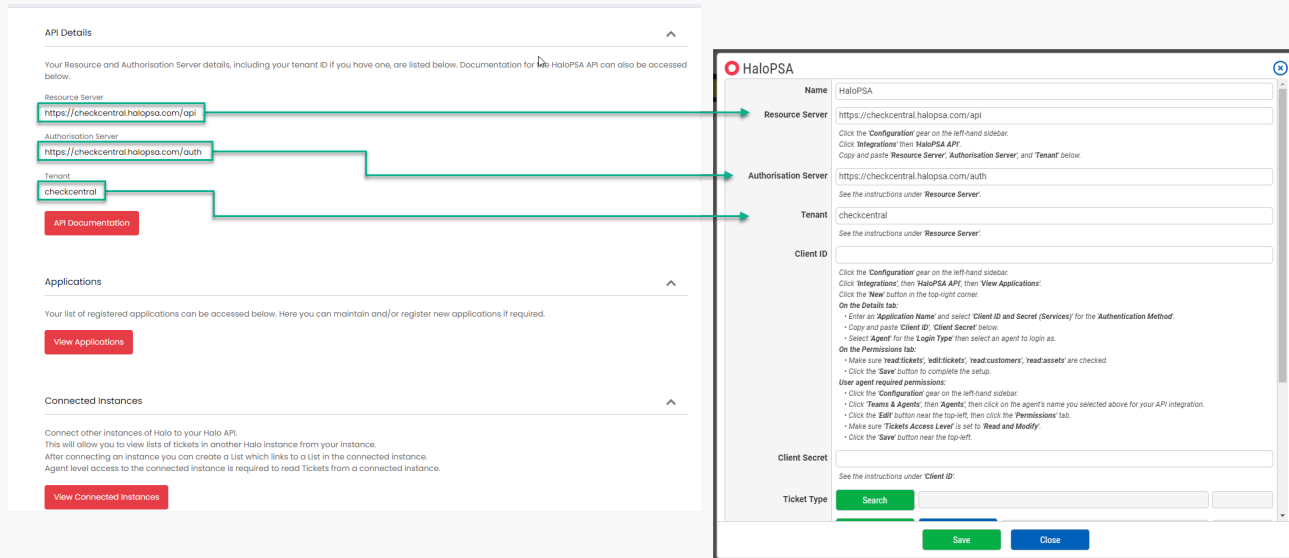
Click Integrations.



Click HaloPSA API.

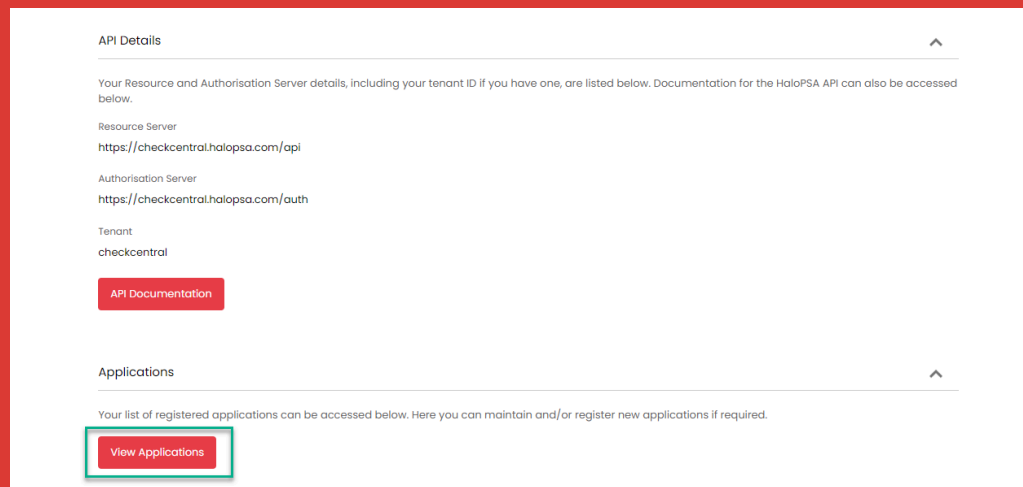
Both

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

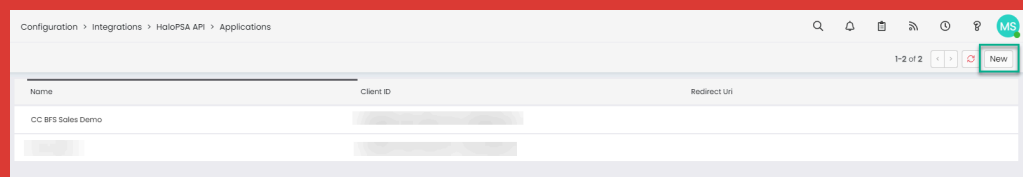


Halo

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

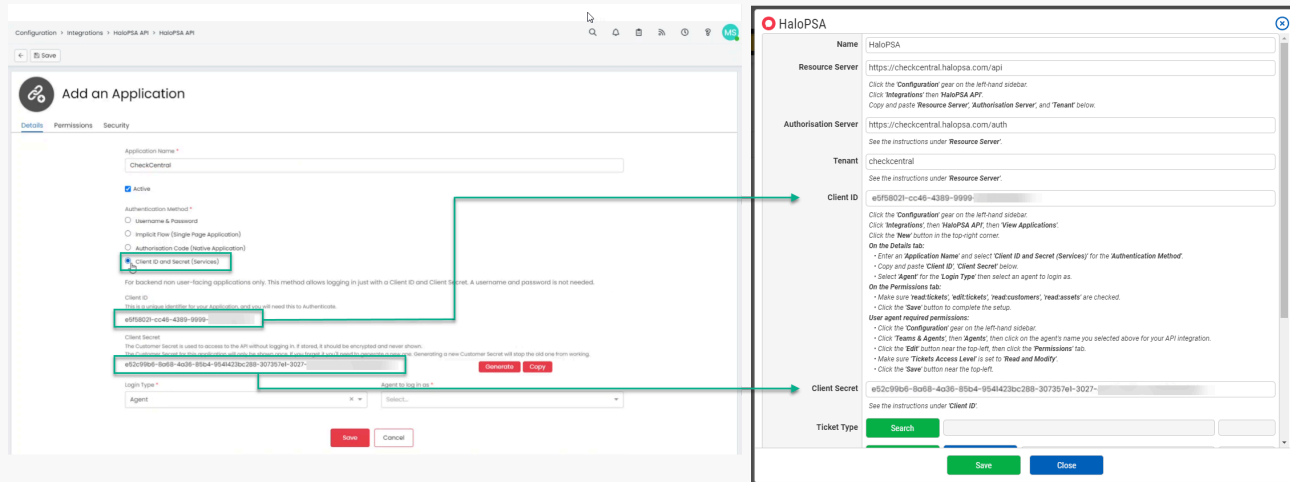


Click New.



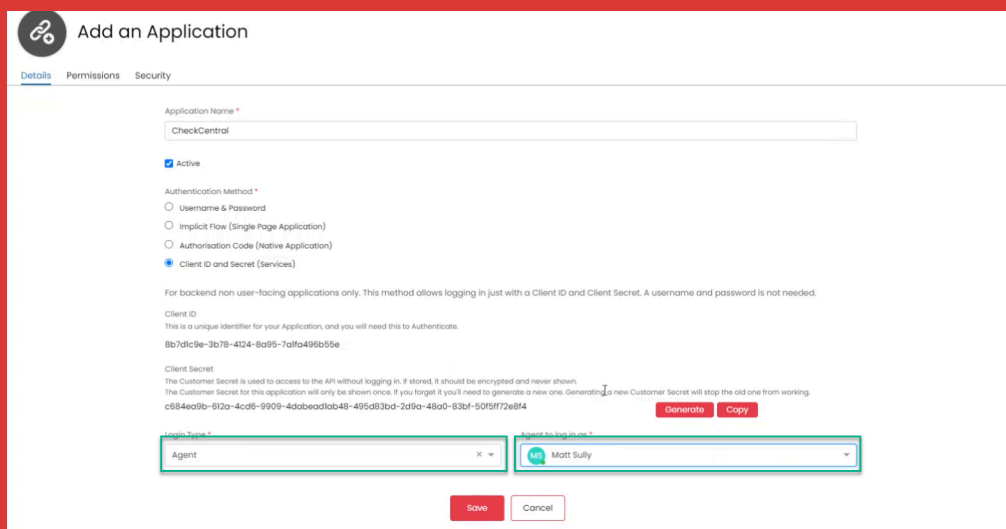
Both

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.

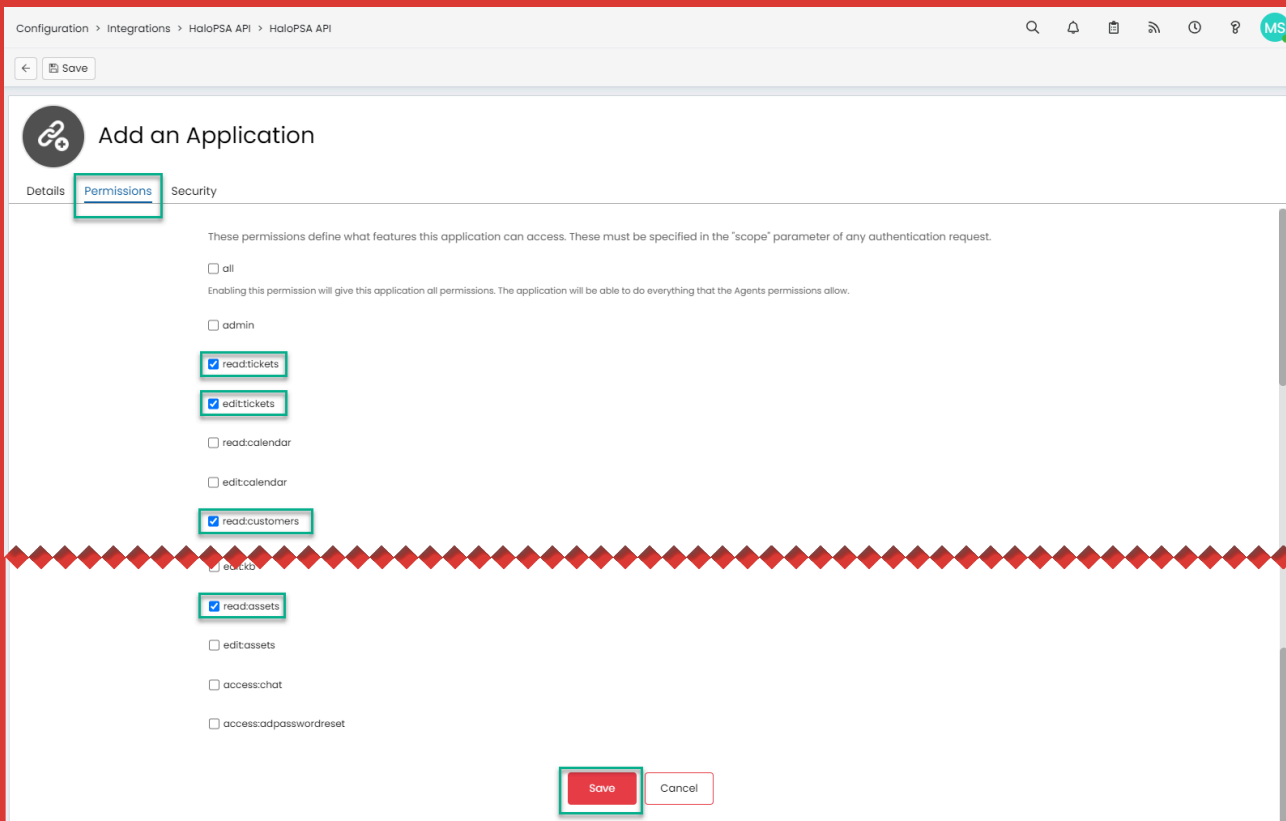


Halo

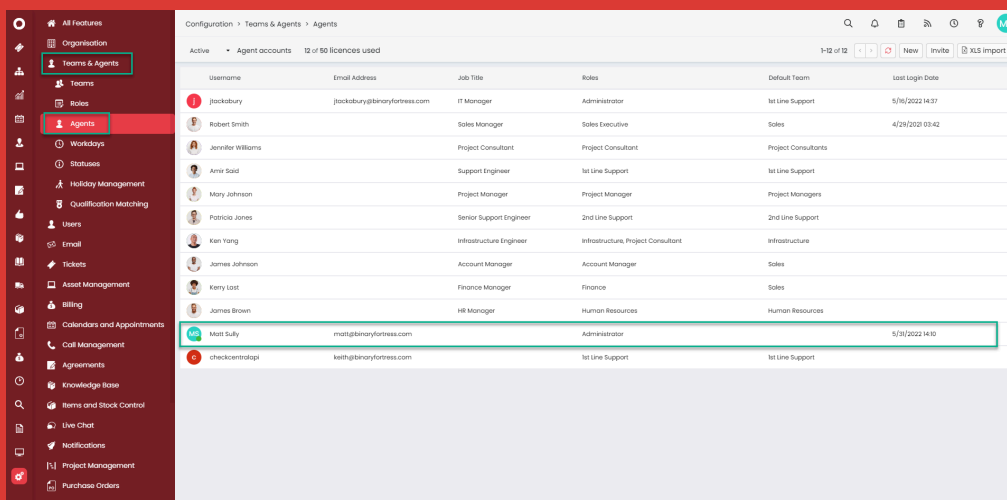
Back in Halo, Select Agent as the login type, then choose the desired agent. This is the agent whose login will be used in association with this API application, though an alternative agent can be chosen for future tickets created via CheckCentral.



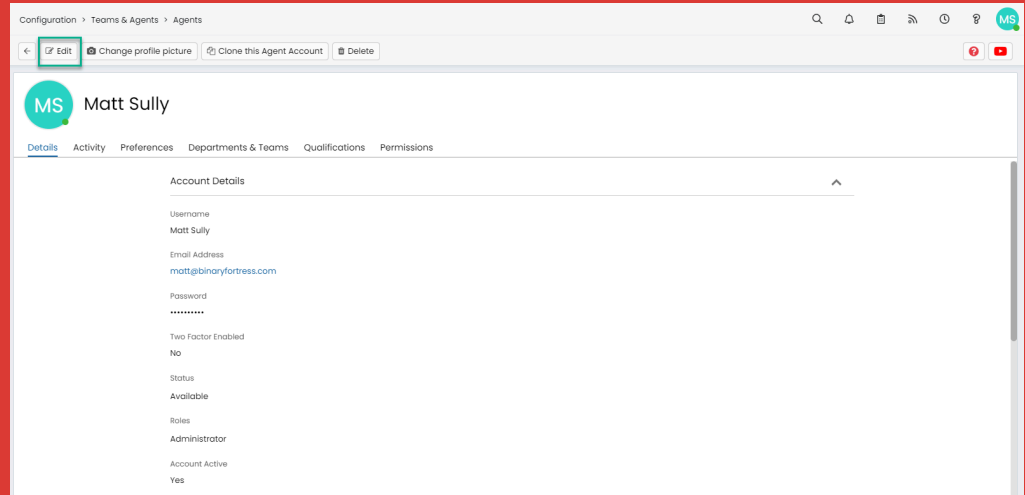
Now move to the tab labeled Permissions. Ensure Read Tickets, Edit Tickets, Read Customers, and Read Assets are enabled. Scroll down and click Save.



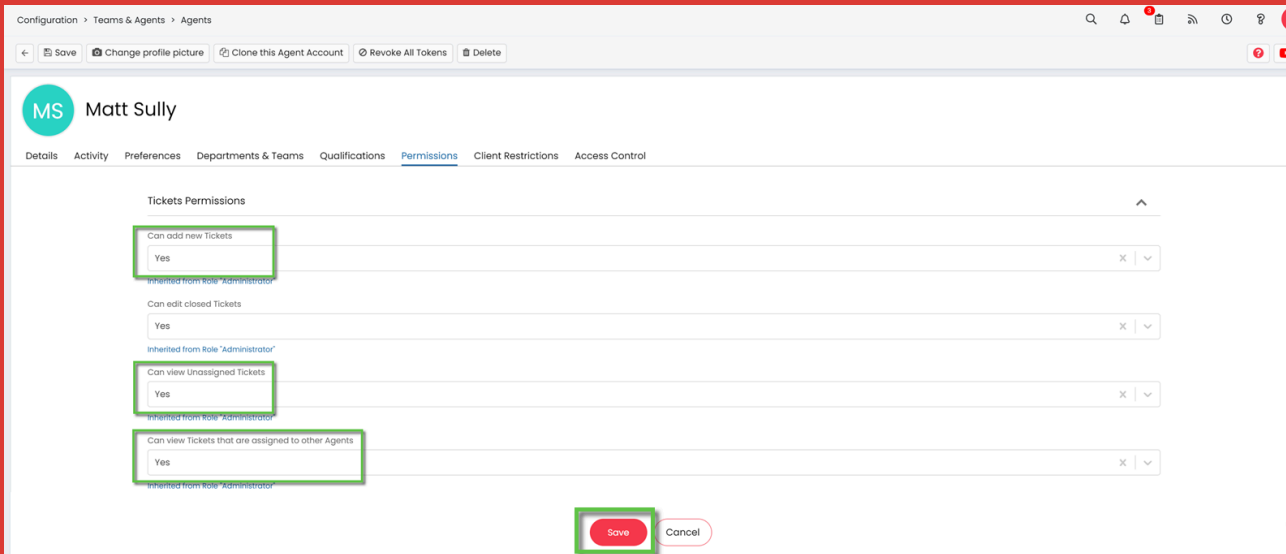
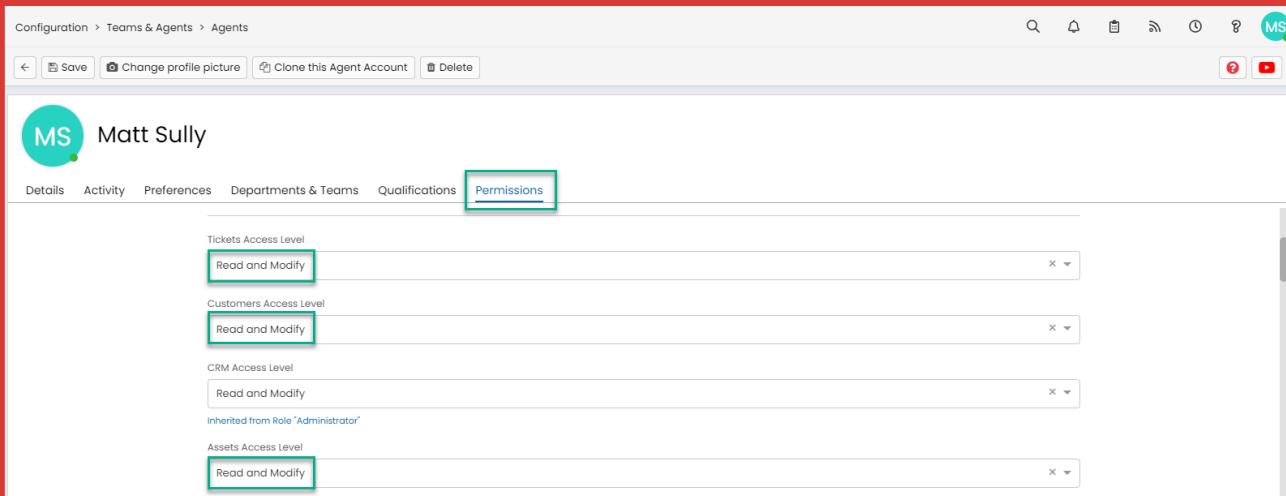
Still in the Configuration window of HaloPSA, click Teams and Agents, then Agents. Click on the same agent's name chosen earlier.



Click Edit near the top-left.



Then click the Permissions tab.

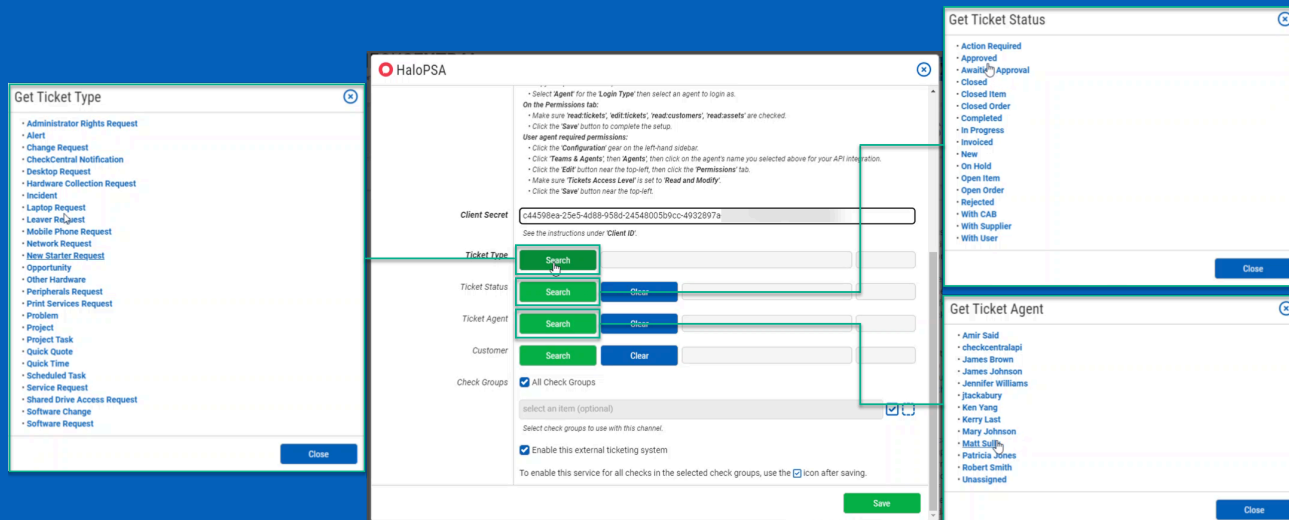


Once here, under the Feature Access category, ensure Tickets Access Level, Customers Access Level, and Assets

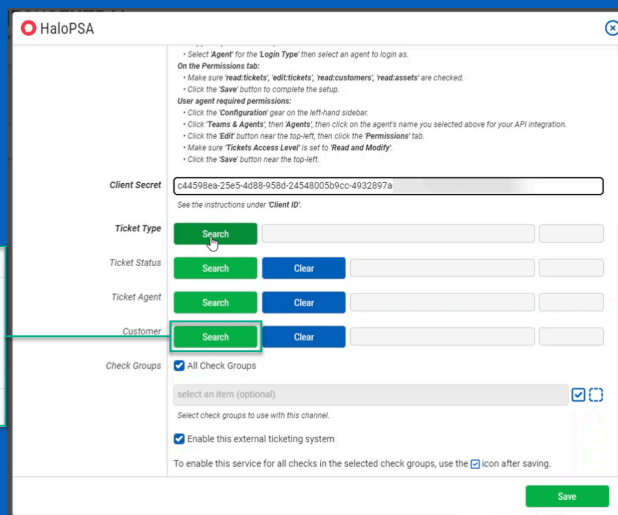
tickets belong to. Every ticket is always part of a team and department so the agent needs to be part of the relevant team/department as well.

CheckCentral

Return to the CheckCentral configuration window to finish.



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.



For customers, you can select specific customers or set the channel to automatically select the customer based on the Check Group name. Note: If you're using automatic Customer selection for ticket creation, please ensure that all Customers in your HaloPSA instance have at least one Site or User assigned on the Sites & Users tab.

HaloPSA Help Configuring HaloPSA

Ticket Status

Ticket Closed Status

Ticket Agent

Customer

Failure Category

Warning Category

Failure Priority

Warning Priority

Enable Channel Enable this ticketing system channel

Ticketing Create or update tickets for failure statuses
 Create or update tickets for warning statuses
 Automatically close tickets when checks are set to success

Notify on Error Send notification to organization admins on ticket creation failure

Checks and Default Groups

Finally, choose which Check Groups will use this HaloPSA ticketing channel. By default, all check groups are selected. To be more selective, click the green Manage button next to the Checks and Check Groups label and use the tree view dialog to select the checks and check groups you want to use this ticketing system. Once you've selected your check groups, ensure the 'Enable this external ticketing system' checkbox is enabled, and click Save.

CHECKCENTRAL by Binary Fortress Software

Dashboards ▾ Checks ▾ Notifications ▾ Activities Organization ▾ Help ▾ Account ▾

External Ticketing Systems

HaloPSA ✎ ↶ ↷ ↵ 🗑

Settings ▾

Check Groups 📁 All Check Groups 🗑

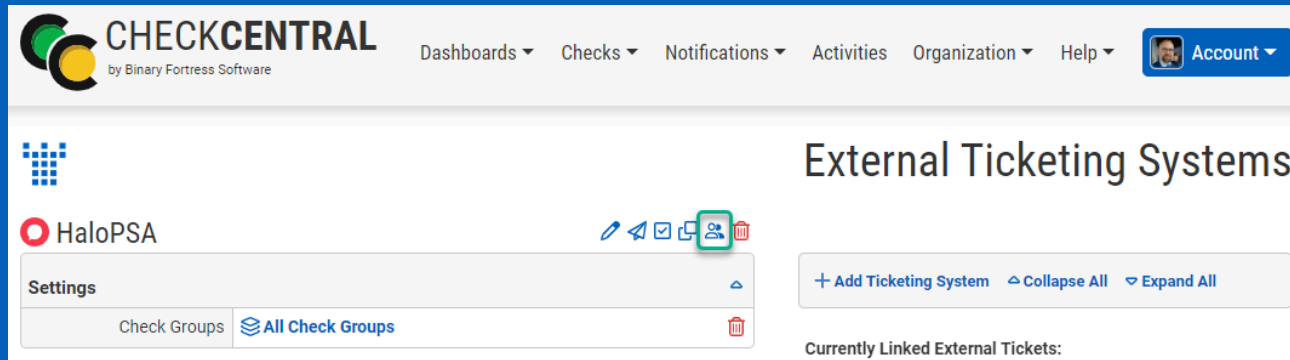
Currently Linked External Tickets:

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

Import Customers as Check Groups

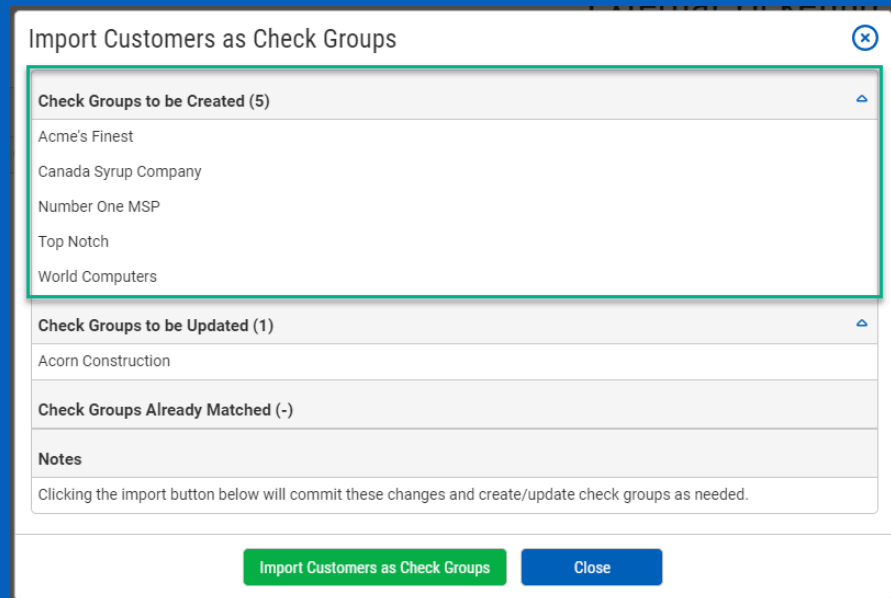
CheckCentral

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.

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**

Existing Groups Already Matched with Halo will be skipped.

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**

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**

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 a form with the following fields:

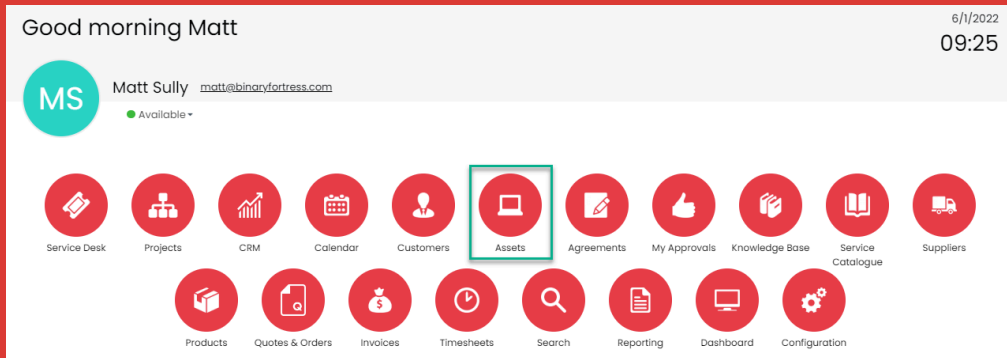
- Name:** Acorn Construction
- Assign to Group:** Acorn Construction (with an 'Add Check Group' link)
- Label:** Veeam
- Description:** (empty text area)
- Asset ID:** (highlighted with a green box)

 To the right of the form, there is explanatory text:

- 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 the assets, with the first row highlighted. The 'Assets' icon from the previous screenshot is highlighted with a green box.

Customer	Site	Asset Type	Asset Number	Status	Key Field	Key Field 2	Key Field 3
Acorn Construction	Main	Laptop	4CE046000	Not Ready	Lenovo ThinkStation P500	4CE046000	800.00

Both

The screenshot shows the 'Identification' tab of the CheckCentral interface. On the left, the 'Asset Details' for asset '4CE0460D0G' (Laptop) are visible. The 'Asset Number' field is highlighted with a green box. A green arrow points from this field to the 'Asset ID' field in the 'Check Configuration' section on the right, which also contains the value '4CE0460D0G'. Other fields in the configuration include 'Name' (Acorn Construction), 'Assign to Group' (Acorn Construction), 'Label' (Veem), 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 CheckCentral interface. The 'Save' button in the top right corner is highlighted with a green border. The configuration fields are visible, including 'Name', 'Assign to Group', 'Label', 'Description', and 'Asset ID'.

This screenshot shows the 'Save' tab of the CheckCentral interface. The 'Save Check' button in the bottom right corner is highlighted with a green border. The 'Existing Messages' section is visible, with options to 'Process unmatched messages after saving' and 'Process matched messages after saving'.

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.cc>

About Binary Fortress Software

Binary Fortress has spent 19 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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