# **HaloPSA Integration**



# 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.

CHECKCENTRAL by Binary Fortress Software	Dashboards ▼ Checks •	Notificati	ons ▼ Activities	organization ▼ Help ▼
' <b>!!</b> " binary <b>fortress</b>		Organizatio External Tie	on cketing Systems	🧷 🗟 🤗 Da
Overview	Current	S Reports	n History	
			,	

#### Click Add Ticketing System and choose HaloPSA.

W	External Ticketing Systems	Add Ticketing System			[filter
No notification channels configured.	+ Add Ticketing System Collapse All © Expand All	<u>گ</u>	<u>A</u> *	6	ê*
		Atera	Autotask	Bugzilla	ConnectWise Manage
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		Freshdesk	GitHub	GitLab	HaloPSA
		4	<b>♦</b>		✓
		Jira Service Management	Jira Software	Kaseya BMS	Microsoft To Do List
			<u>≙</u> +		
		Redmine	SyncroMSP	Zendesk	

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

Name	Halopsa
Resource Server	
	Click the 'Configuration' gear on the left-hand sidebar.
	Click 'Integrations' then 'HaloPSA API'.
	copy and paste Resource Server, Authonisation 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 ton-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', 'adit-tickets', 'read-outomers', '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.
	<ul> <li>Click 'Teams &amp; Agents', then 'Agents', then click on the agent's name you selected above for your API integration.</li> </ul>
	Click the 'Edit Dutton hear the top-left, then click the 'Permissions' tab.     Make sure 'Tickets Access Level' is set to 'Bead and Modify'
	Click the 'Save' button near the top-left.
Client Secret	
	See the instructions under 'Client ID'.
Ticket Type	Search
Tioket Type	Scalul
	Save Close
	and the second

You can name this configuration anything you'd like.

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



### Halo









# Both

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

our Resource and Authorisation Server details, including your tenant ID if you have one, are listed below. Documentation for be HaloPSA API can also be accessed	O HaloPSA		$\otimes$
now. Isource Server	Name	IaloPSA	^
tps://checkcentral.halopsa.com/api	Resource Server	ttps://checkcentral.halopsa.com/api	
athorisation Server pp://checkcentralhalopsa.com/auth	0 0 0	Not the Configuration part on the HR-hand sidebar. Not integrations them HubbPSA.PTC opy and pasts Resource Server, Xuthorisation Server, and Tenant below.	- 1
nant	Authorisation Server	ttps://checkcentral.halopsa.com/auth	
neckcentrol	Si	ee the instructions under Resource Server'.	
API Documentation	Tenant cl	heckcentral	
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onnected instances		<ul> <li>- Link me <b>computation</b> pairs on the lett-rains observed.</li> <li>- Link The <b>set</b> Adjust on the lett-rains observed.</li> <li>- Click The <b>set</b> Adjusts, then toplent, then click on the agent's name you selected above for your API integration.</li> <li>- Click The <b>Set</b> Adjusts.</li> <li>- Click</li></ul>	
nneet other instances of Haio to your Haio API. ils will allow you to view lists of tickets in another Haio instance from your instance.		Click the 'Save' button near the top-left.	
ter connecting an instance you can create a List which links to a List in the connected instance. gent level access to the connected instance is required to read Tickets from a connected instance.	Client Secret	an the function of the William DDI	
View Connected Instances	Ticket Type	search	

# Halo

The remaining information is in Halo's Applications area. From the HaloPSA API screen, click View Applications.	API Details	A Jaccessed
	Applications Your list of registered applications can be accessed below. Here you can maintain and/or register new applications if required. View Applications	<u>^</u>
Click New.	Configuration > HaloPSA API > Applications         Q         Q         Q         Q         D         D           Nome         Client D         Redirect Uri	₩ 0 9 MS of 2 < > ○ 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.

In the second secon	Image: Section of the sec	suration > Integrations > HoloPSA API > HoloPSA API		O HaloPSA		
Add an Application  <	<form></form>	B Sow		Name Resource Server	HaloPSA https://checkcentral.halopsa.com/api	
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	Concel			Ticket Type	See the instructions under 'Wient ID'.	
	See Cone	Sove Cancel				

### 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.

Application Nome *
CheckCentral
Z Active
Authentication Method *
O Username & Password
Implicit Flow (Single Page Application)
Authorisation Code (Native Application)
Client ID and Secret (Services)
For backend non user-facing applications only. This method allows logging in just with a Client ID and Client Secret. A username and password is not needed.
Client ID. This is a unique identifier for your Application, and you will need this to Authenticate.
8b7dlc9e-3b78-4124-8a95-7a1fa496b55e
Client Secret The Customer Secret is used to access to the API without logging is. If stored, it should be encrypted and never shown. The Customer Secret is used to access to the application will only be shown once if you logging it. If stored it application are one. Generating a new Customer Secret will stop the old one from working. c684eo3b-512a-4cc66-5909-4dobeodlob48-495d53bc4-2d90-480o-53bt-50f5ff72e8f4 Convertee Copy
login type *
Agent × • Q Mott Sully •



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 > H	IGIOPSA API > HGIOPSA API	Q	۵	Ē	۳	0	g	MS
← 🖺 Save								
Radd an A	Application							
Details Permissions Secu	unity							_
	These permissions define what features this application can access. These must be specified in the "scope" parameter of any authentication request.							1
	all Enabling this permission will give this application all permissions. The application will be able to do everything that the Agents permissions allow.							
	admin							
	C readtickets							
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•••••		••	••			<b>*</b> *		••
	Z read-assets							
	editassets							
	access.chat							
	access:adpasswordreset							
	Save							

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

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0	🖀 All Features	Configuration > Teams & Agents > a	Agents			Q (	u 🗈 a O 8 👧
*	Organisation	Active • Agent accounts 12 of	f 50 licences used			1-12 of 12	3 New Invite XLS import
4	1 Teams & Agents	Utemana	Empil Address	tob Title	Boles	Padault Team	Last Logia Data
1	🙎 Teams	Cariname		200 110	NUMBA		tan taga tan
	Roles	Jtockobury	jtackabury@binaryfortress.com	IT Manager	Administrator	Ist Line Support	6/16/2022 14:37
	2 Agents	Robert Smith		Sales Manager	Sales Executive	Sales	4/29/2021 03:42
2	() Workdays	Jennifer Williams		Project Consultant	Project Consultant	Project Consultants	
•	③ Statuses	Amir Said		Support Engineer	Ist Line Support	Ist Line Support	
	A Holiday Management	Mary Johnson		Project Manager	Project Manager	Project Managers	
6	Qualification Matching     Isons	Patricia Jones		Senior Support Engineer	2nd Line Support	2nd Line Support	
۴	çã Email	Ken Yang		Infrastructure Engineer	Infrastructure, Project Consultant	Infrastructure	
	🔶 Tickets	James Johnson		Account Manager	Account Monager	Sales	
	Asset Management	Kerry Lost		Finance Manager	Finance	Sales	
6	👌 Billing	James Brown		HR Manager	Human Resources	Human Resources	
n	Colendars and Appointments	Matt Sully	matt@binaryfortness.com		Administrator		5/31/2022 1410
	Call Management						
•	Z Agreements	checkcentralapi	kethpbnoryfortress.com		tat Line Support	lat Line Support	
O	🎁 Knowledge Base						
۹	🕜 Items and Stock Control						
B	Live Chat						
	🚀 Notifications						
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Click Edit near the top-left.	Configuration > Teams & Agents > Agents C Z Edit Change profile picture C Clone this Agent Account D Delete	Q Q 🖞 🗎 🔊 O 8 🚾
	Matt Sully Deteils Activity Preferences Departments & Teams Qualifications Permissions	
	Account Detoils	^
	Usename Matt Suly	
	Email Address matt@binaryfortress.com	
	Password	
	Two Factor Enabled No	
	Stotus Available	
	Roles Administrator	
	Account Active Ves	

#### Then click the Permissions tab.

Configuration > Teams & Agents > Agents	Q	۵	Ē	٣	0	ę	MS
← 🔄 Save 🗖 Change profile picture 🖉 Clone this Agent Account 🗋 Delete						0	
Details Activity Preferences Departments & Teams Qualifications Permissions							
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Configuration > Teams & Agents > Agents		Q	۵	8	9	0	8 <b>(</b>
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Tickets Permissions				^			
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Can view Tackets that are assigned to other Agents Ves			×	~			



Important Note: The agent that you use for permissions needs to have access to the teams or departments the 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.

			Get Ticket Status	$\otimes$
	O HaloPSA	() ()	Action Required     Approved     Awaitian Approval	
Get Ticket Type	Client Secret Ticket Type Ticket Status	- Second Se	Cooled Inter-     Cooled Inter-     Cooperational Confere-     Completed     In Progress     Involved     New     On Indd     Open Order     Open Order     With CABplier     With User	Cinter
Point Services Request     Problem     Project     Project Task     Oucle Choose     Oucle Time     Scheduburd Task     S	Ticket Agent Customer Check Groups	Select and International Science of Control	Get Ticket Agent - Amir Said - decicembalagi - amas Johnson - amore Subhann - jackabary - Keny Last - Kany Johnson - Matt Jago	٥
		To enable this service for all checks in the selected check groups, use the 🔁 con after saving.	Robert Smith     Unassigned	Close

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				(7) Help Configuring HaloPSA	6
Ticket Status	Search	Clear			
Ticket Closed Status	Search	Clear			
Ticket Agent	Search	Clear			
Customer	Search	Clear			
Failure Category	Search	Clear			
Warning Category	Search	Clear			
Failure Priority	Search	Clear			
Warning Priority	Search	Clear			
Enable Channel	C Enable this ticketir	ng system channel			
Ticketing	Create or update ti	ckets for failure stat	uses		
	Create or update ti	ckets for warning sta	atuses		
	Automatically clos	e tickets when check	ks are set to success		
Notify on Error	Send notification t	o organization admir	ns on ticket creation failure		
Checks and Default Groups	Manage	]			
*		-		Save	

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 -
1				Exter	nal Ticke	eting	Systems
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Settings			<b>\$</b>	+ Add Tick	eting System 🗠 Co	llapse All	
Check Groups SAll Check Groups			Ŵ	Currently Lir	nked External Ticke	ts:	

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.

CHECKCENTRAL by Binary Fortress Software	Dashboards 🔻	Checks ▼	Notifications 🔻	Activities	Organization 🔻	Help 🔻	Account -
				Exter	nal Ticke	eting	Systems
O HaloPSA		04	☑ᇆᆂᅟᆒ				
Settings			<u>م</u>	+ Add Tick	eting System 🗠 Co	llapse All	▽ Expand All
Check Groups SAll Check Groups			Ū	Currently Lir	ked External Ticke	ts:	

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.

Import Customers as Check Groups	$\otimes$
Check Groups to be Created (5)	۵
Acme's Finest	
Canada Syrup Company	
Number One MSP	
Top Notch	
World Computers	
Check Groups to be Updated (1)	۵
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	

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 Alread	y 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)	4
Acme's Finest	
Canada Syrup Company	
Number One MSP	
Top Notch	
World Computers	
Check Groups to be Updated (1)	۵
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	

mport Customers as Check Groups	$\otimes$
Check Groups to be Created (5)	۵
Acme's Finest	
Canada Syrup Company	
Number One MSP	
Top Notch	
World Computers	
Check Groups to be Updated (1)	۵
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	⊗
Check Groups to be Created (5)	۵
Acme's Finest	
Canada Syrup Company	
Number One MSP	
Top Notch	
World Computers	
Check Groups to be Updated (1)	۵
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.

Identification	Schedule	Matching	Sta	atus	Notifications	Save
Name	Acorn Construction			Identificatio	n	
Assign to Group	Acorn Construction	▼	* X	Name The name assi on the CheckC from CheckCe	igned to the check. This name will entral dashboard and in notification	be displayed
Description				Assign to Grou Groups can be desired group Group" link to o	up used to organize your checks. Se from the drop-down menu, or use create a new group.	lect your the "Add Checl
Asset ID				Label (optional An optional lab	I) bel 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.

Search Assets 🔎	Assets >	Laptops/Workstations						۹ ۵	Ē	<i>۳</i> (	9	MS
📄 Assets by Asset Group									1-1 of 1		Ø New	
Laptops/Workstations		Customer	Site	Asset Type	Asset Number	Status	Key Field	Key Field 2		Key Field 3		
Mobile Devices	• 😑	Acorn Construction	Main	Laptop	4CE0460D0G	Not Ready	Lenovo ThinkStation P500	4CE0460D0G		800.00		
► Monitors												
<ul> <li>Network Hardware</li> </ul>												
<ul> <li>Other Hardware</li> </ul>												
Servers												



Both							
ACE0460D0G Laptop Details Overview Users & Linked Assets Supplier & Maintenance Tackets Documents Agreements	Identification	Schedule	Matching	SI	tatus	Notifications	Save
Asset Type Loptop Ste	Name	Acorn Construction			<b>Identificatio</b> Provide a name	<b>n</b> e and other identifying details fo	the new check.
Acom Construction/Main Asset Number 4:253400000	Assign to Group Label	Acorn Construction Veeam	<ul> <li>Add Check Group</li> </ul>	- X	Name The name assi on the CheckC from CheckCer	gned to the check. This name wi entral dashboard and in notificat ntral.	II be displayed ions you receive
Business Outer Not set Technicol Owner Not set	Description				Assign to Grou Groups can be desired group t Group" link to c	IP used to organize your checks. S from the drop-down menu, or use create a new group.	elect your e the "Add Check
Sendor Level Agreement Do not override	Asset ID	4CE0460D0G			Label (optional An optional lab	I) bel to organize this check. Check	s with the same

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



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 18 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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