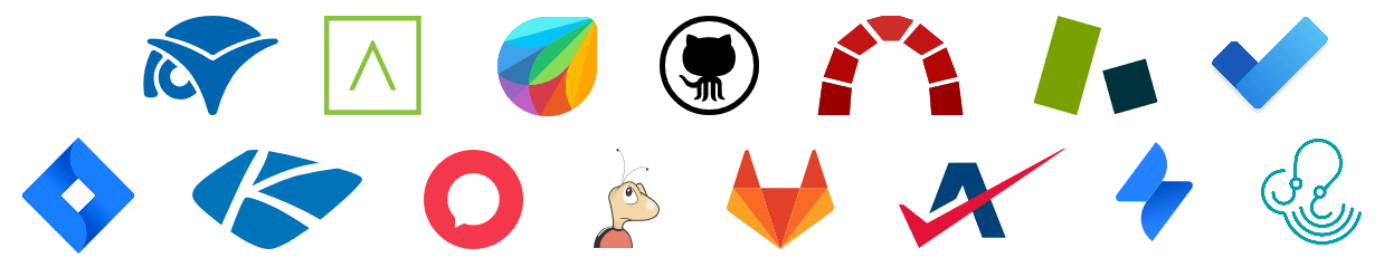
HaloPSA Integration

CHECKCENTRAL

BINARYFORTRESS

HaloPSA Integration



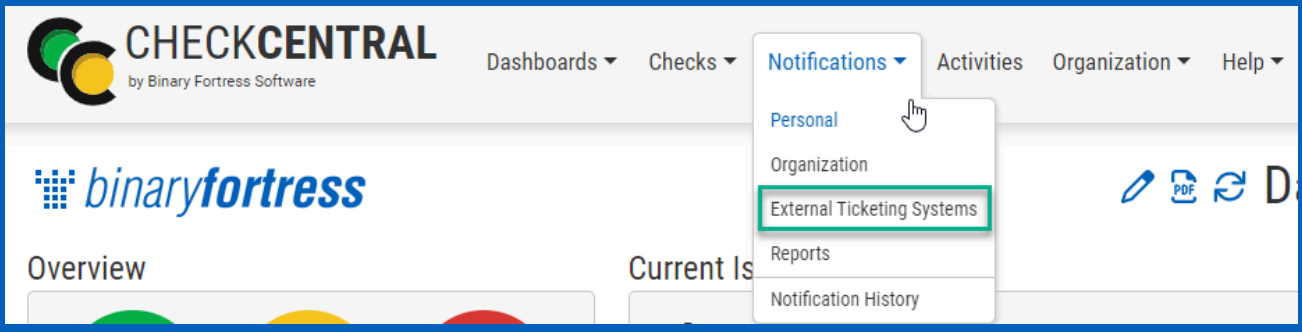
CheckCentral integrates with several RMMs, PSAs, and ticketing software, including HaloPSA, helping you consolidate service ticket issues.



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

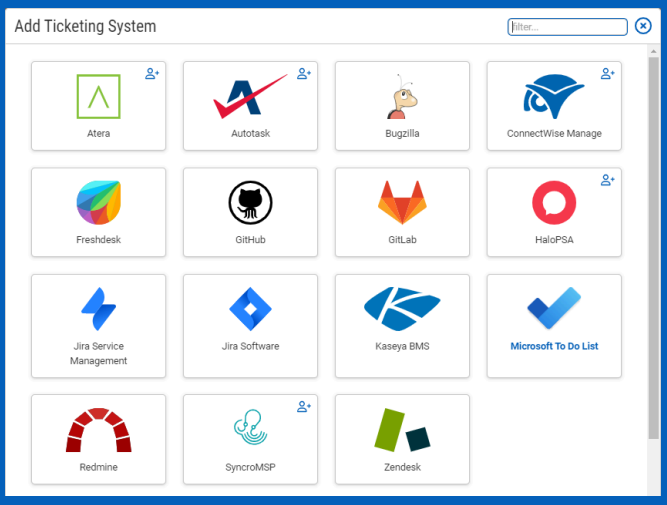
CheckCentral

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

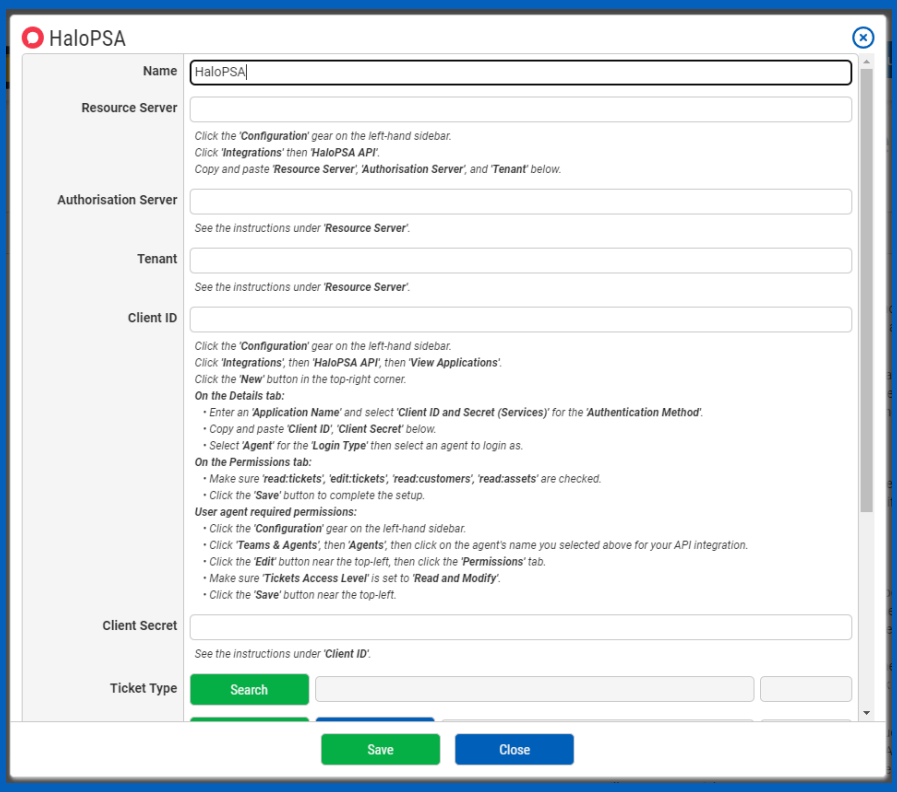


Click Add Ticketing System and choose HaloPSA.





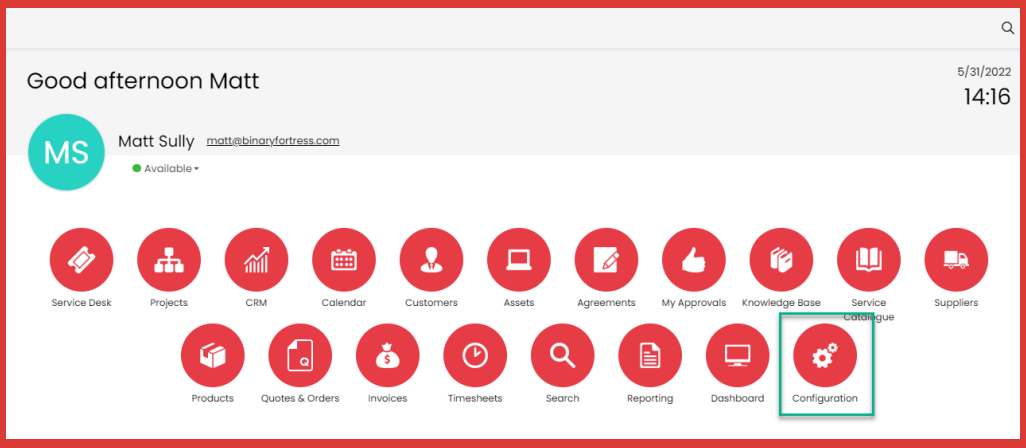
This will bring up the configuration options required for CheckCentral to communicate with HaloPSA servers via the API.



You can name this configuration anything you'd like.

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

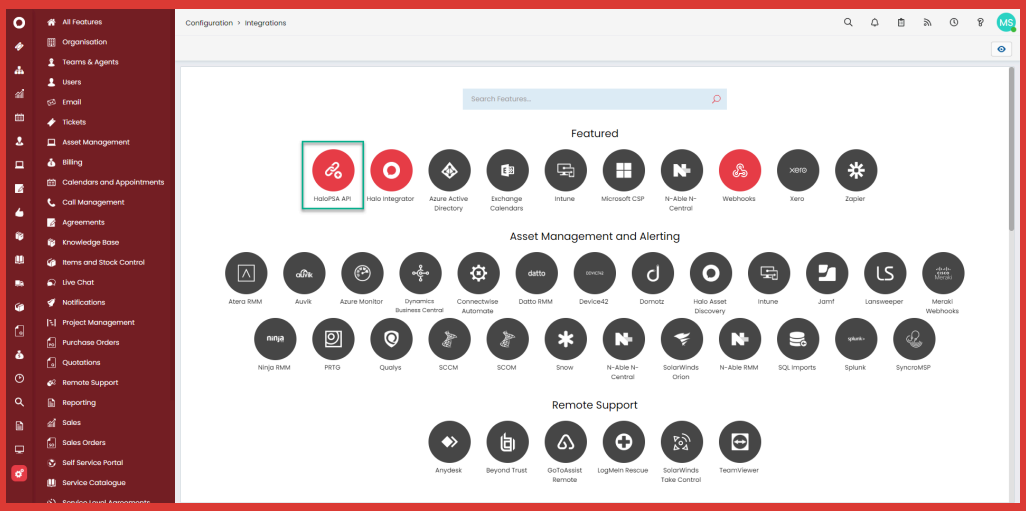
Halo



Click Configuration.



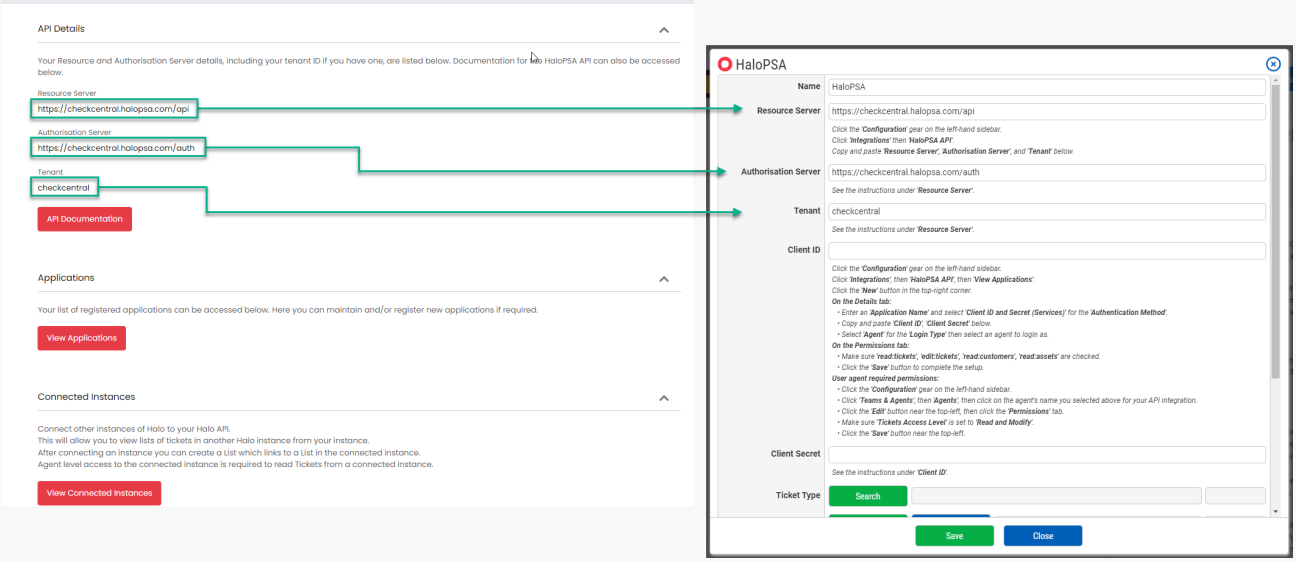
Click Integrations.



Click HaloPSA API.

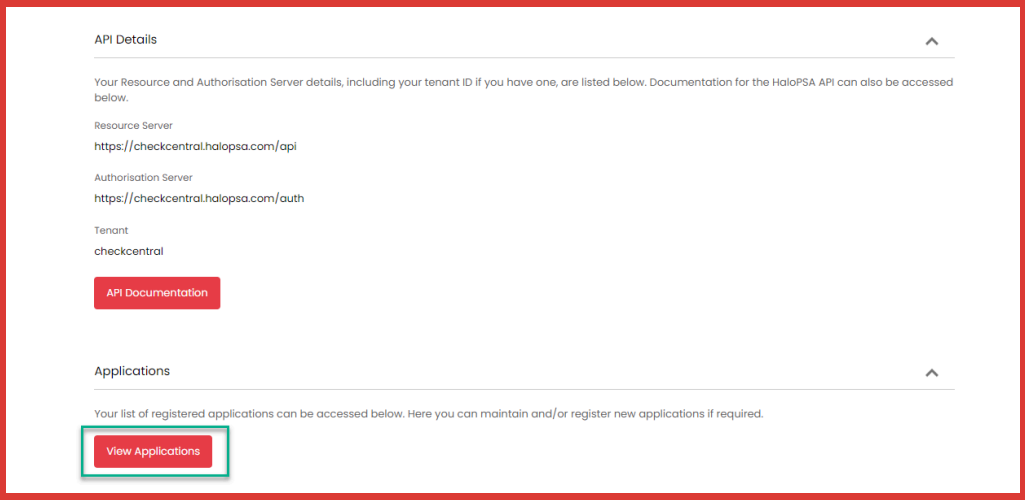
Both

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

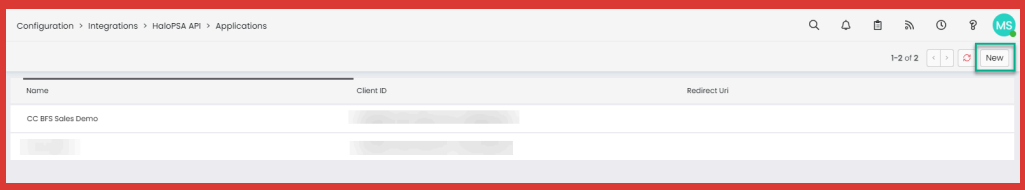


Halo

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

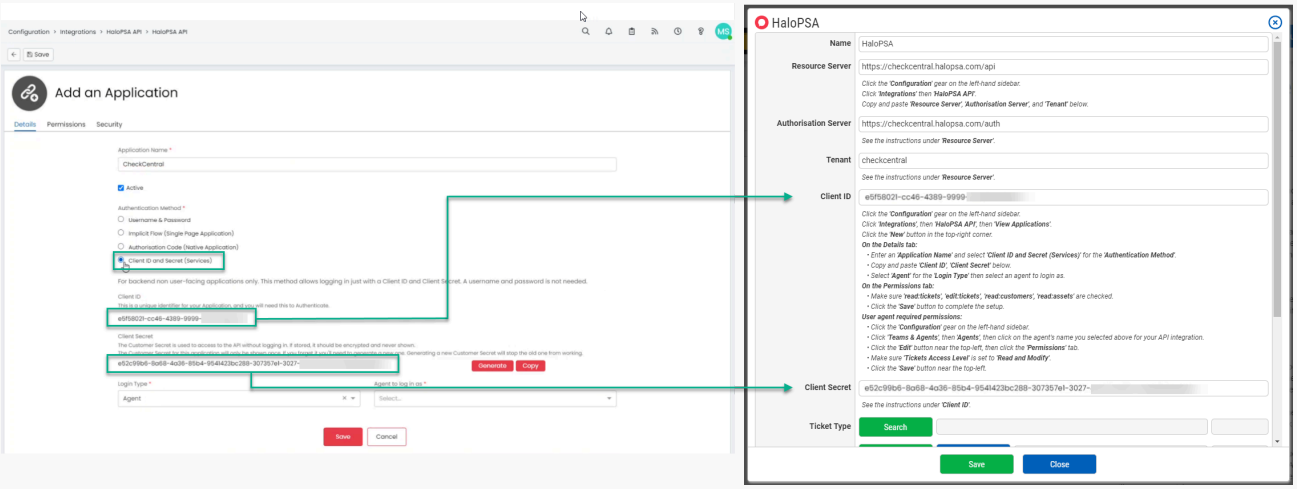


Click New.



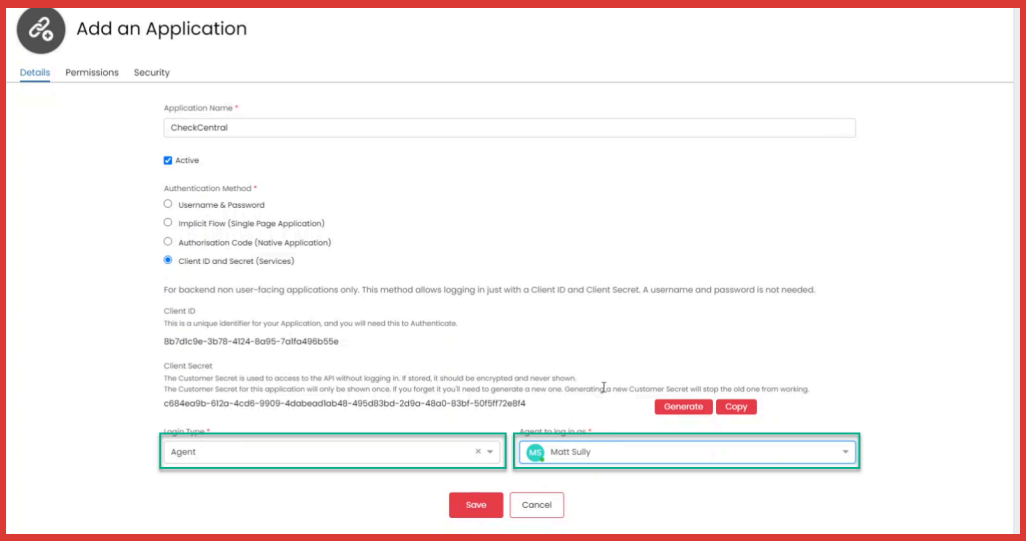
Both

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.

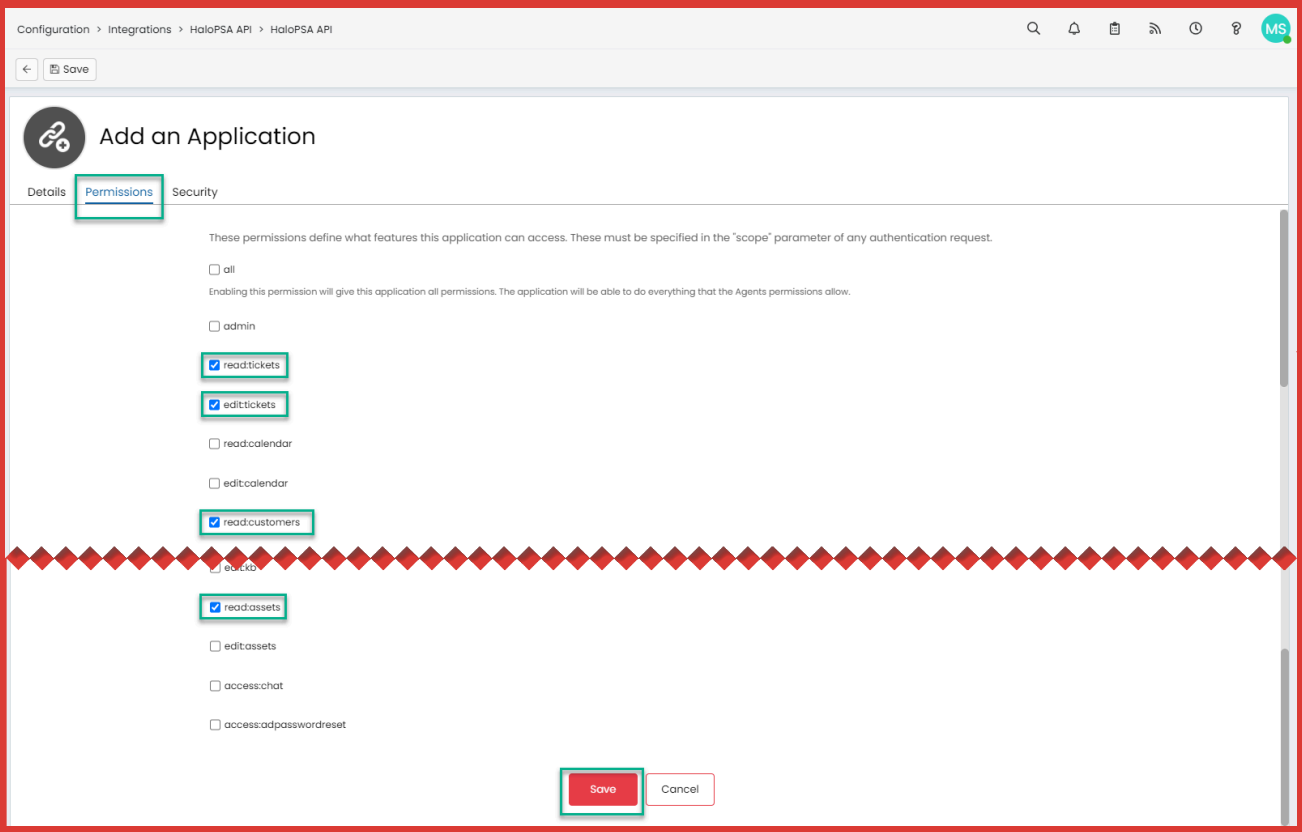


Halo

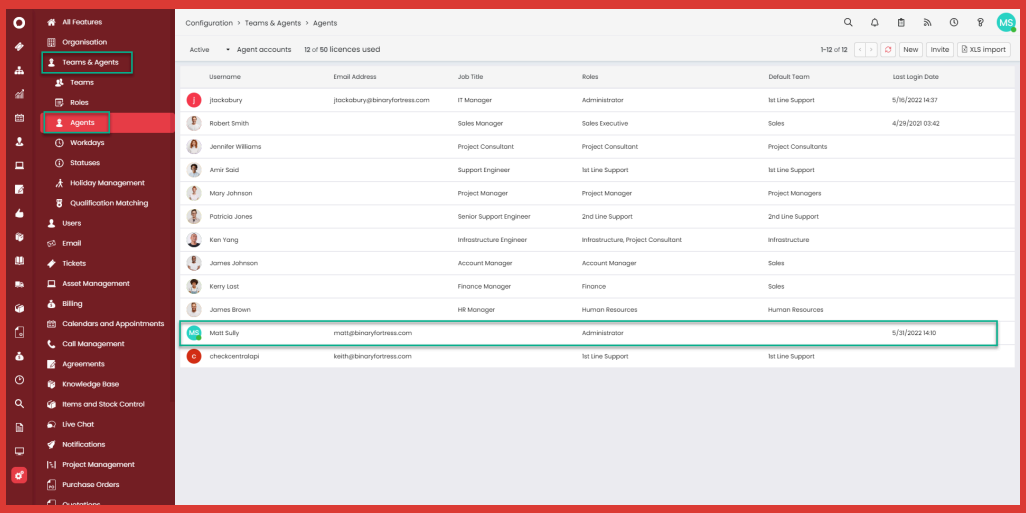
Back in Halo, Select Agent as the login type, then choose the desired agent. This is the agent whose login will be used in association with this API application, though an alternative agent can be chosen for future tickets created via CheckCentral.



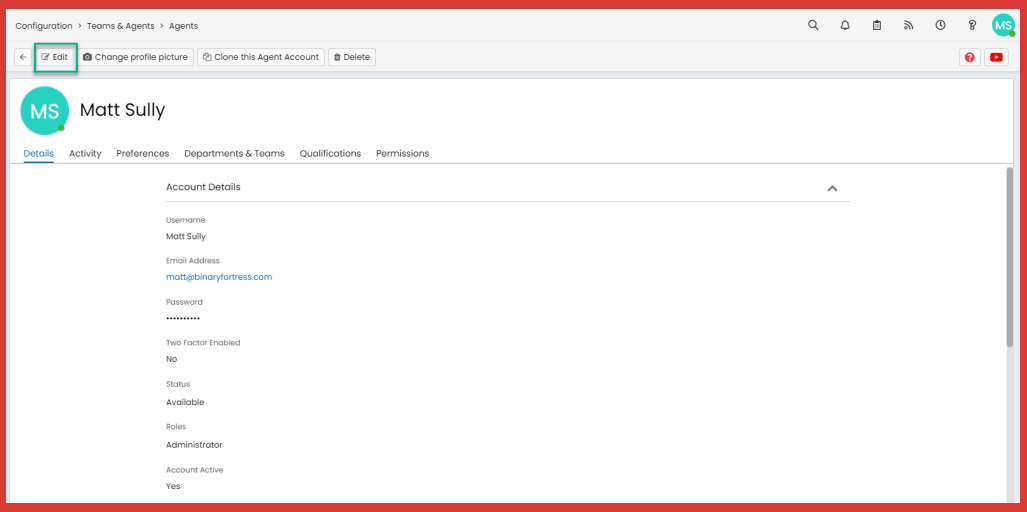
Now move to the tab labeled Permissions. Ensure Read Tickets, Edit Tickets, Read Customers, and Read Assets are enabled. Scroll down and click Save.



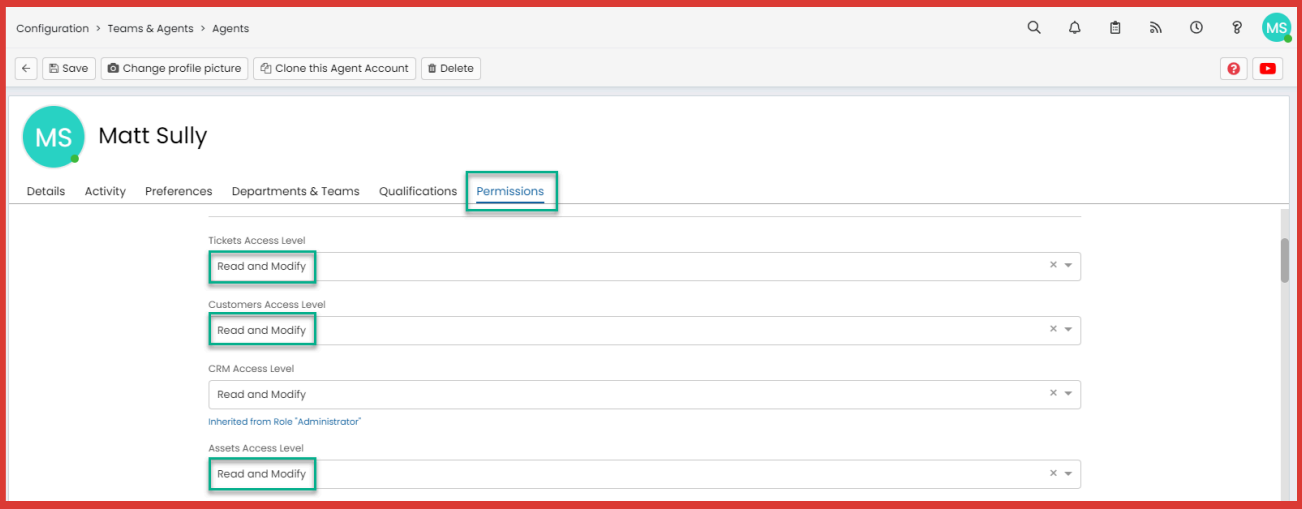
Still in the Configuration window of HaloPSA, click Teams and Agents, then Agents. Click on the same agent's name chosen earlier.

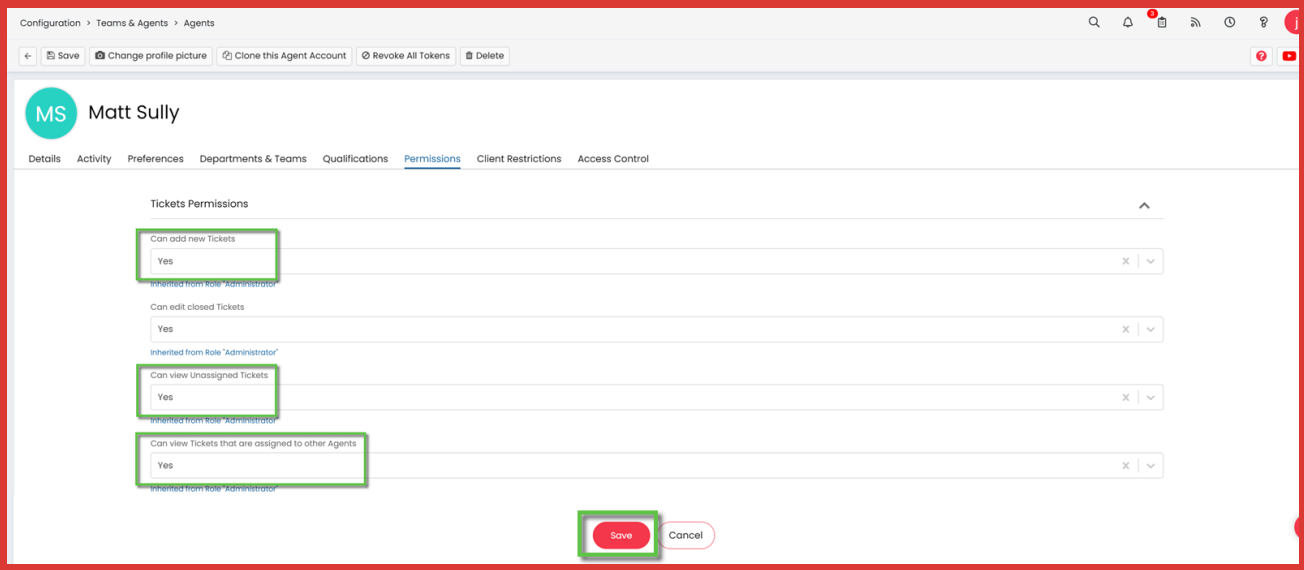


Click Edit near the top-left.



Then click the Permissions tab.



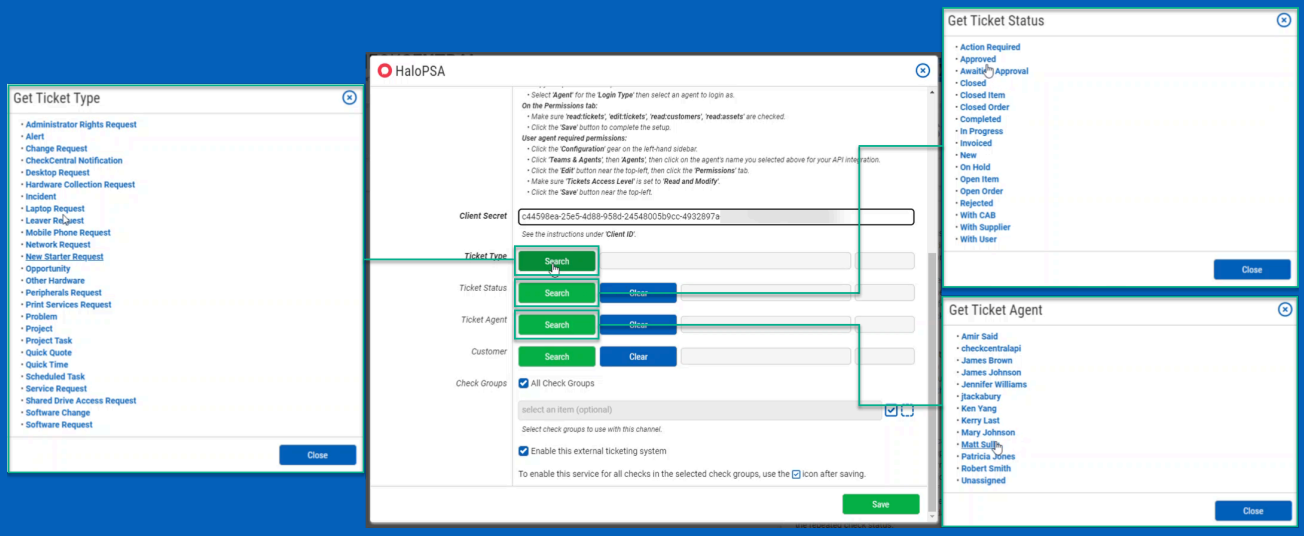


Once here, under the Feature Access category, ensure Tickets Access Level, Customers Access Level, and Assets

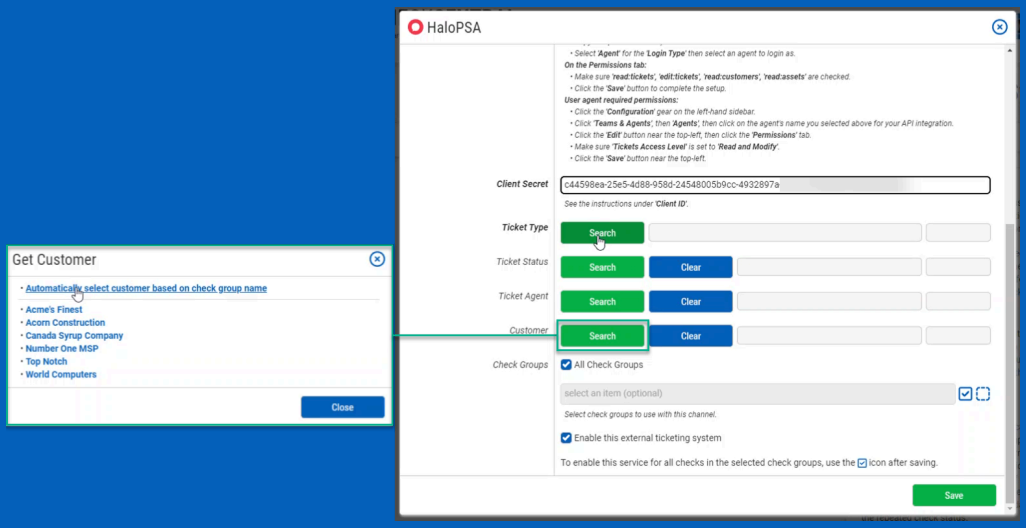
tickets belong to. Every ticket is always part of a team and department so the agent needs to be part of the relevant team/department as well.

CheckCentral

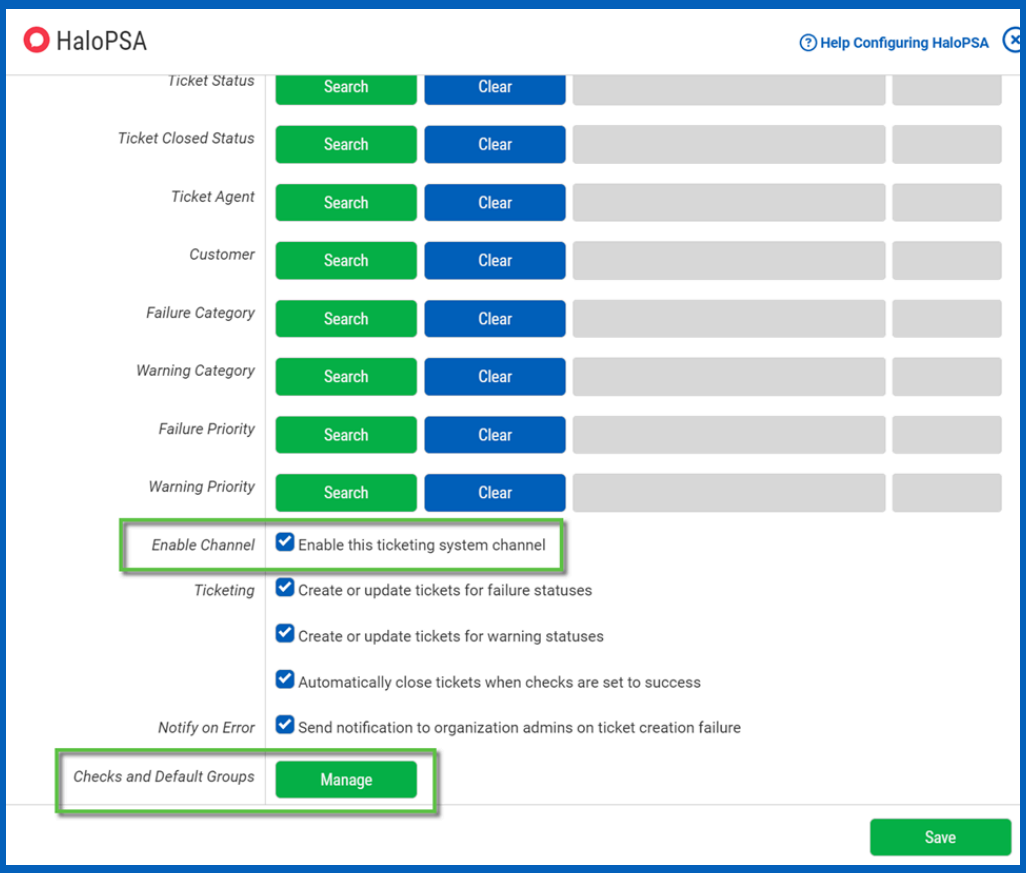
Return to the CheckCentral configuration window to finish.



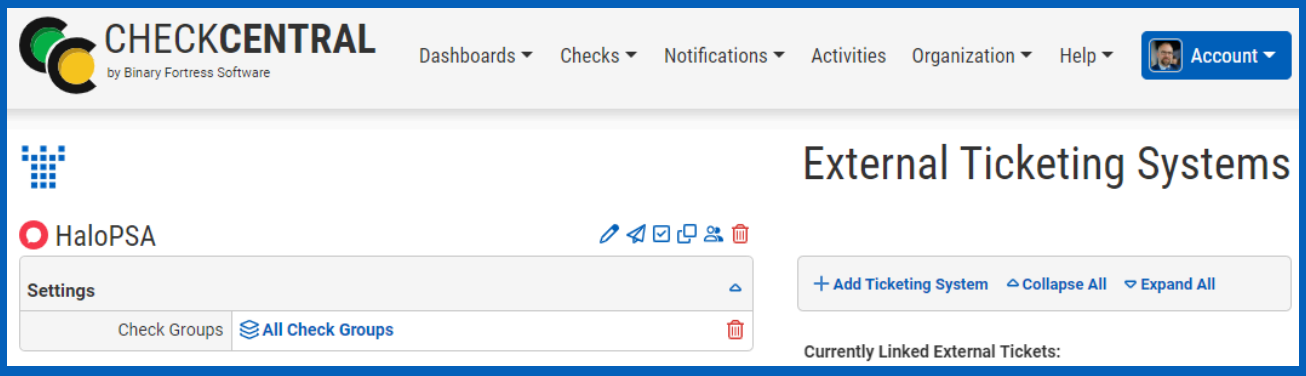
With the API configuration details added, you can now select the Ticket Type, Ticket Status, and Ticket Agent that will be used to manage tickets in HaloPSA. Click on the Search button to bring up relevant lists and choose one from each list.



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.



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.

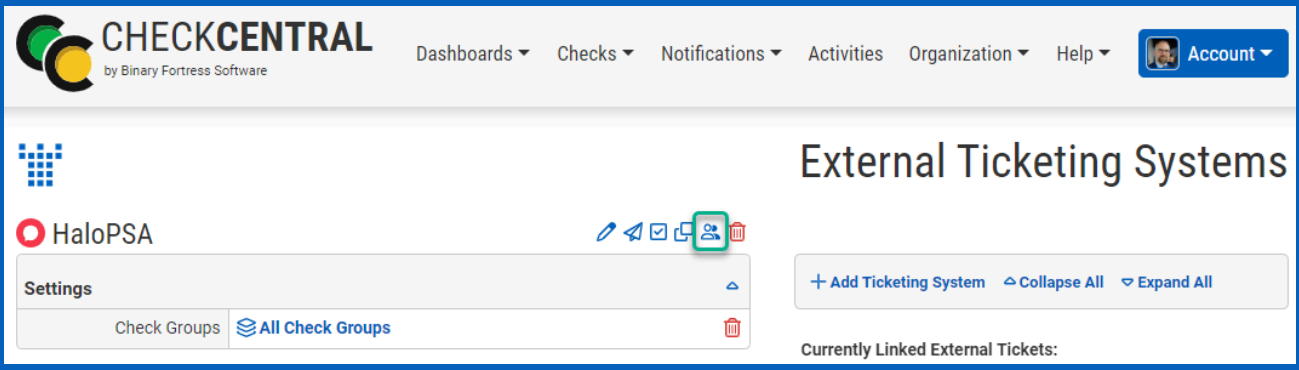


This External Ticketing System channel will now be available for use with any check under your Check Central account.

Import Customers as Check Groups

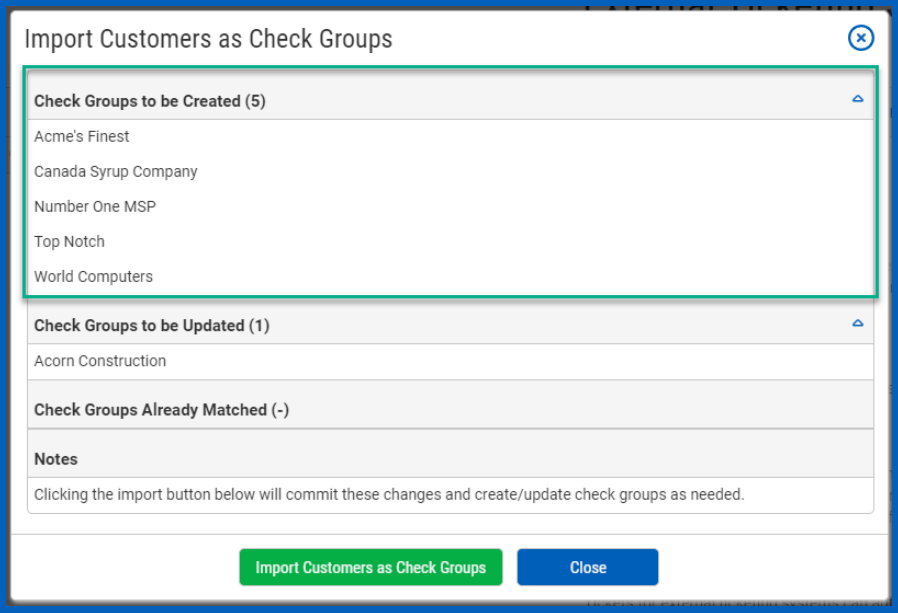
CheckCentral

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

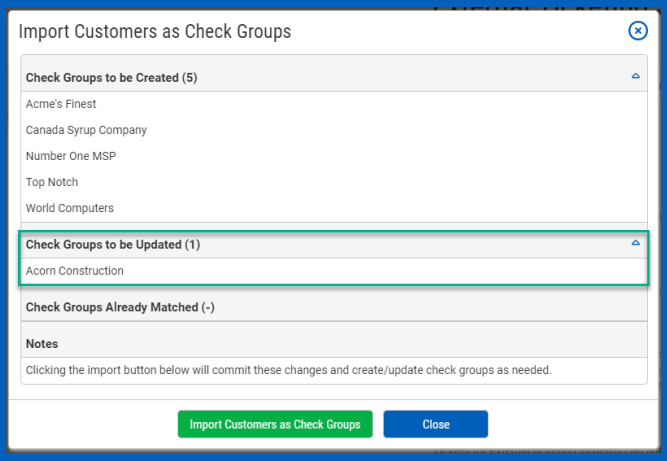


From the External Ticketing Systems page, click on the Customer Import icon above your newly-created channel.

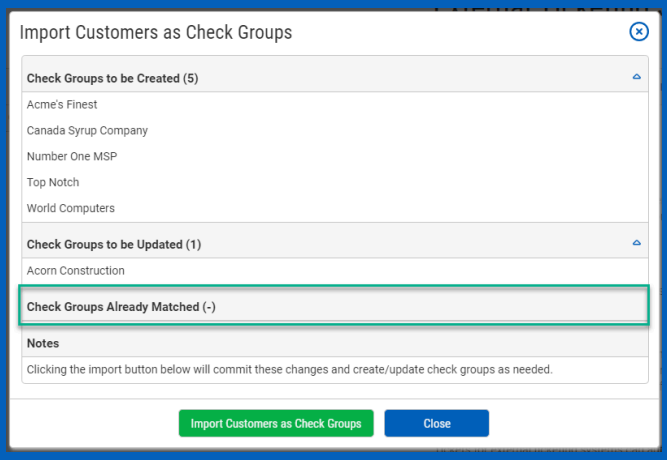
If no similar check groups exist, your customers will be listed under Check Groups to be Created.



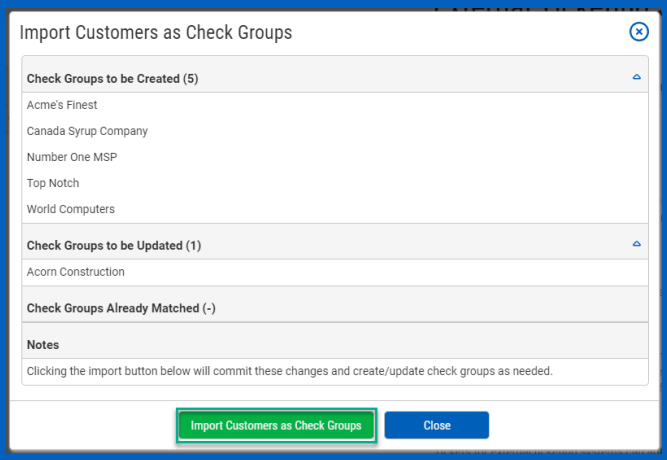
If you've already created Check Groups using customer names, they will display in the Check Groups to be Updated section, ensuring they match with Halo.



Existing Groups Already Matched with Halo will be skipped.



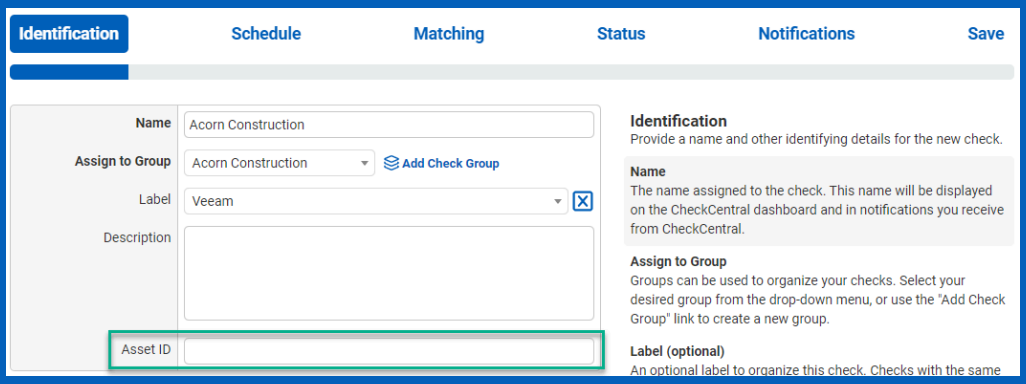
Now click Import Customers as Check Groups to complete the import.



Asset ID Integration

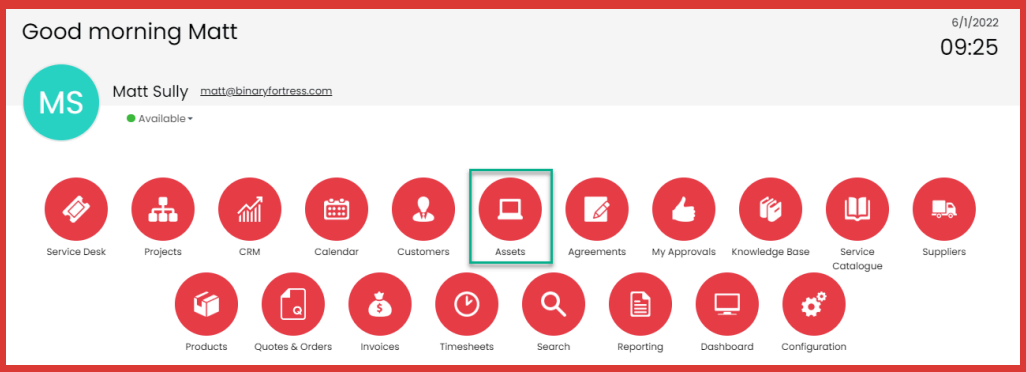
CheckCentral

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

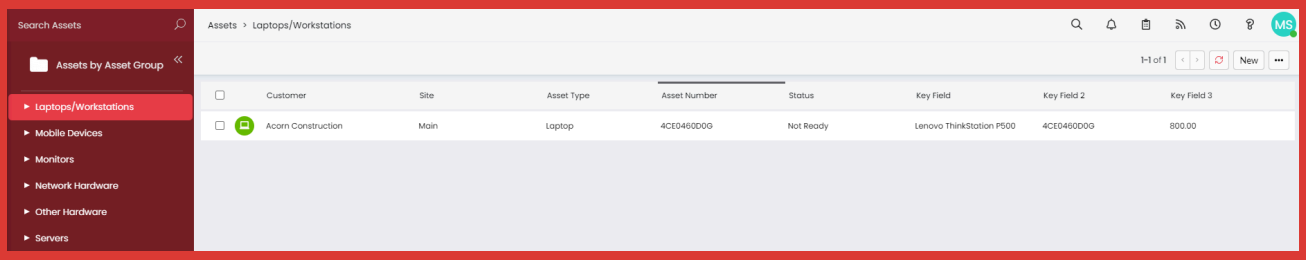


To create this association, look for the Asset ID field when creating or editing a Check.

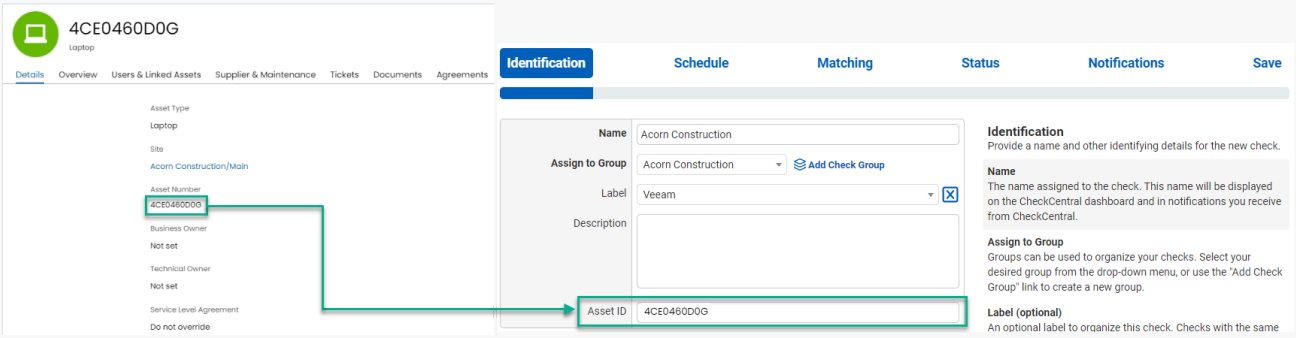
Halo



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

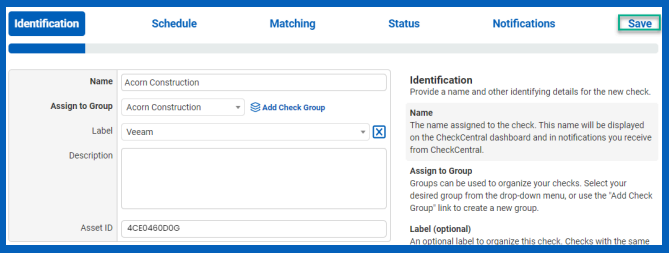


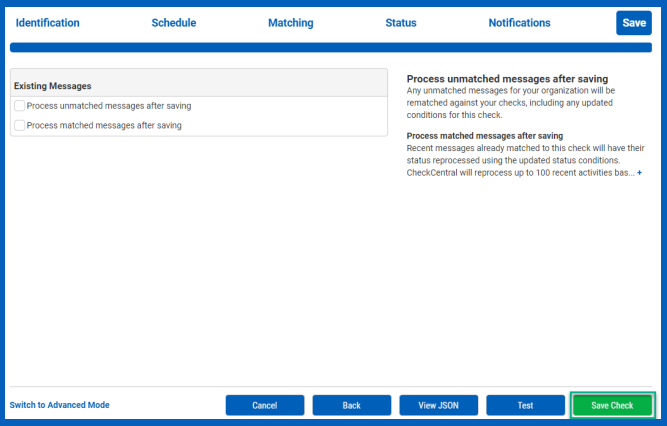
Both



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

CheckCentral





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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