Halo Integration Setup

Connecting HaloPSA to MSPbots lets you leverage automation and Business Intelligence (BI) solutions to manage every aspect of your MSP business. The integration is done by assigning the appropriate user permissions in HaloPSA, entering the integration settings in the MSPbots app, and configuring webhooks. This article provides the prerequisites and step-by-step guide to establishing a HaloPSA connection with MSPbots.

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1. Prerequisites for connecting HaloPSA to MSPbots

You need the following to establish a successful HaloPSA integration with MSPbots:

• Correct permissions set in HaloPSA:

o Identify the user who will run the API and have access to the MSPbots app. Use the Agent to log in as field.

Permissions	Security
	Application Nome *
	Enter the name of the Application here
	Z Active
	Authentication Method *
	O Username & Password
	O implicit Flow (Single Page Application)
	Authorisation Code (Native Application)
	Client ID and Secret (Services)
	For backend non user-facing opplications 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.
	Client Sucret
	The Client Secret is used to access to the API without logging in. If stored, it should be encrypted and never shown.
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	Login Type * Agont log in zo *

Assign the appropriate permissions to the identified user. For example, granting the read:tickets permission will give MSPbots read-only
access to all data to which the user has access.

60	Add c	in Application
etails	Permissions	Security
		These permissions define what features this application can access. These must be specified in the "scope" parameter of any authentication request.
		oli oli
		Enabling this permission will give this application all permissions. The application will be able to do everything that the Agents permissions allow.
		🗋 admin
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		editiciets
		🗋 readcalendar
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		readcustomers
		editcustomers
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^o Ensure the user is part of a department or team that has the corresponding permissions to access the relevant data.

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Refer to the HaloPSA Guides for the instructions on setting up these permissions.

- Required information for configuring the integration in MSPbots:
 - Auth URL
 - ° Resource URL
 - Tenant
 - Client ID
 - ° Client Secret

Refer to the HaloPSA Guides for the instructions on setting up the API permission.

2. How to set up the HaloPSA and MSPbots integration

2.1. 1. Complete the prerequisites for the integration.

2.2. 2. Submit the required information in the MSPbots app.



b. Search for Halo PSA and click it to open the connection settings.

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c. When the HaloPSA configuration settings appear, fill in all of the following required fields:

- Auth URL
- Resource URL .
- Tenant
- Client ID
- Client Secret

Halo PSA		≈ ⑦
* Auth URL :		
Please Enter Auth URL		
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* Tenant :		
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* Client ID :		
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- d. Click Save And Sync when done.
- e. You will know that HaloPSA's connection is successful when the webhook callback URL field appears on the configuration box. Copy the the value of webhook callback URL to your desktop.

C. Integrations ⑦	Request New Integrations
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webhook callback url https://	â)
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* Resource URL:	
*Tenant: ===/TeningEfr=	
* Oleri D : Internativa Sur contractor santar	
* Client Secret :	
Saw And Sync	

2.3. 3. Configure the HaloPSA webhook

A webhook is required for HaloPSA dashboards to function properly. Configure the HaloPSA webhook according to the steps below.

It is important to configure the webhook correctly. If not properly set, an incorrect webhook may affect the normal data synchronization adversely and trigger HaloPSA's request limit rate of 450 requests within 5 minutes. A correct webhook configuration request ensures that the system will not initiate duplicate synchronizations, thereby reducing the possibility of triggering the rate limit.

a. Once the field for webhook callback URL is visible, log in to the HaloPSA app.

b. Navigate to Configuration > Integrations > Webhooks

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	Configure	ition > In	tegrations > Webhooks			Q	φ	Ξ	9)	G	¥ 🗛
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	Na	me			Payload URL		-	_			Enabled
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d. Fill in the fields for Webhook Name and Payload URL. You can leave the other fields with their default values.

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Details	Deliveries					
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	Enter a name for this Webhook here					
	Payload URL *					
	Webhook Type					
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	application/json × 👻					
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	Use a custom payload					

- Payload URL Enter the webhook callback URL from Step 2.e.
- e. Next, click the Add button to add a new event.

Configuration ← 🖹 Save	> Integrations > Webhooks		Q Q 🎽 🕈 0	8
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h.	Repeat S	Steps 3.e, 3.f and 3 Ticket Changed New Ticket Logge Site created Site updated Site deleted User created User updated User deleted Invoice created Invoice updated Invoice updated	B.g until all the follow	ing events are add	led.	
i.	Then clic	k Save on the Nev	w Webhook screen t	o keep the configu	ration.	
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3. What are the Webhook statuses and messages for the HaloPSA integration?

of1 Cancel

Status		Message	
		messaye	
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Webhoo k received no data for some events	East success autit: 04/01/2022 11:38 CST Type: PSA	Webhook Received No Data For Some Events	0 #
Webhoo k received no data	Halo PSA Last success auth: 04/01/2022 11:38 CST Type: PSA	Webhook Received No Data	0 z
Webhoo k received no data within 4 days	Halo PSA Last success auth: 04/01/2022 11:38 CST Type: PSA	Webhook Received No Data Within 4 Days	0 *

The Webhook statuses for your HaloPSA interaction can show any of the following:



4. Related Topics

- NextTicket Manager for Halo
 API Data Synchronization Failure or Pending in Halo Integration
 Halo Public Datasets