

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.

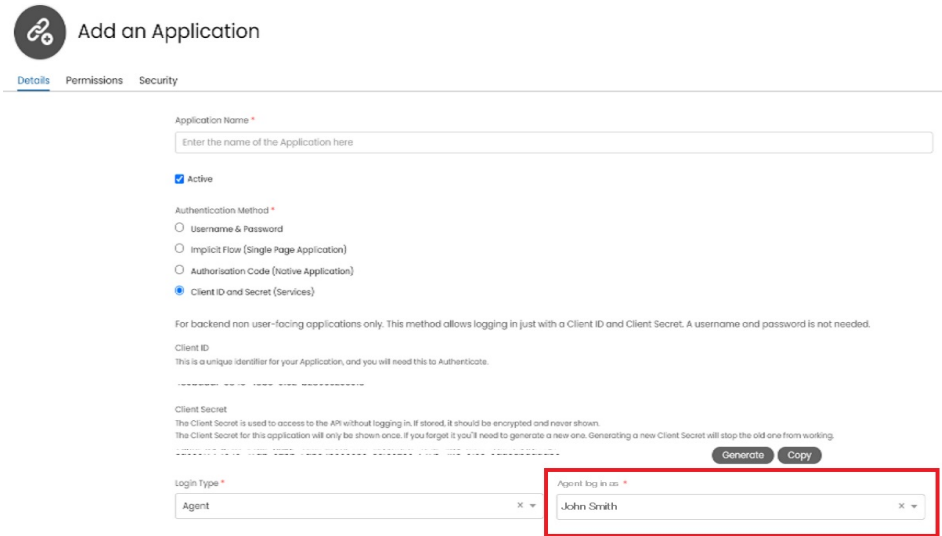
What's on this page:

- [1. Prerequisites for connecting HaloPSA to MSPbots](#)
- [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.](#)
 - [2.3. 3. Configure the HaloPSA webhook](#)
- [3. What are the Webhook statuses and messages for the HaloPSA integration?](#)
- [4. Related Topics](#)

1. Prerequisites for connecting HaloPSA to MSPbots

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

- Correct permissions set in HaloPSA:
 - Identify the user who will run the API and have access to the MSPbots app. Use the **Agent to log in as** field.



Add an Application

Details Permissions Security

Application Name *

Enter the name of the Application here

☒ Active

Authentication Method *

☐ 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.

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Client Secret

The Client Secret is used to access to the API without logging in. If stored, it should be encrypted and never shown. The Client Secret for this application will only be shown once. If you forget it you'll need to generate a new one. Generating a new Client Secret will stop the old one from working.

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Generate Copy

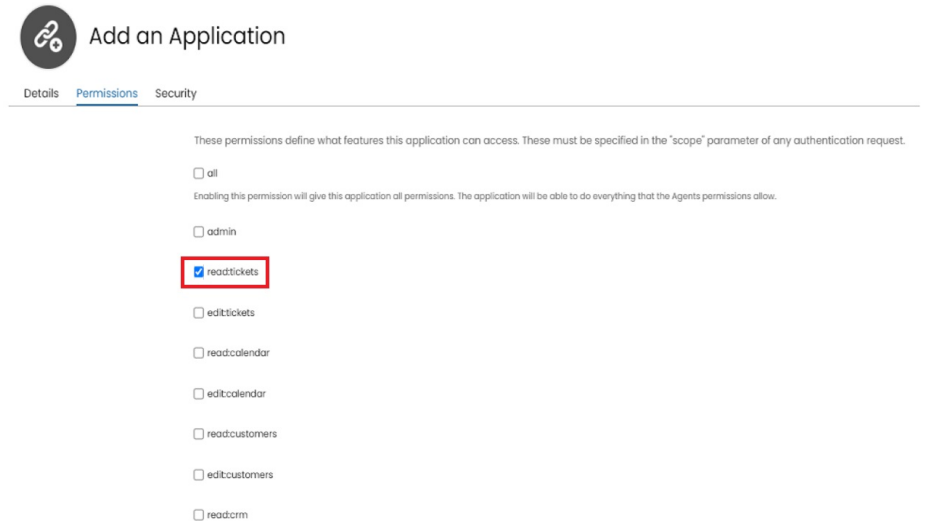
Login Type *

Agent X

Agent to log in as *

John Smith X

- 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.



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

☒ read:tickets

☐ edit:tickets

☐ read:calendar

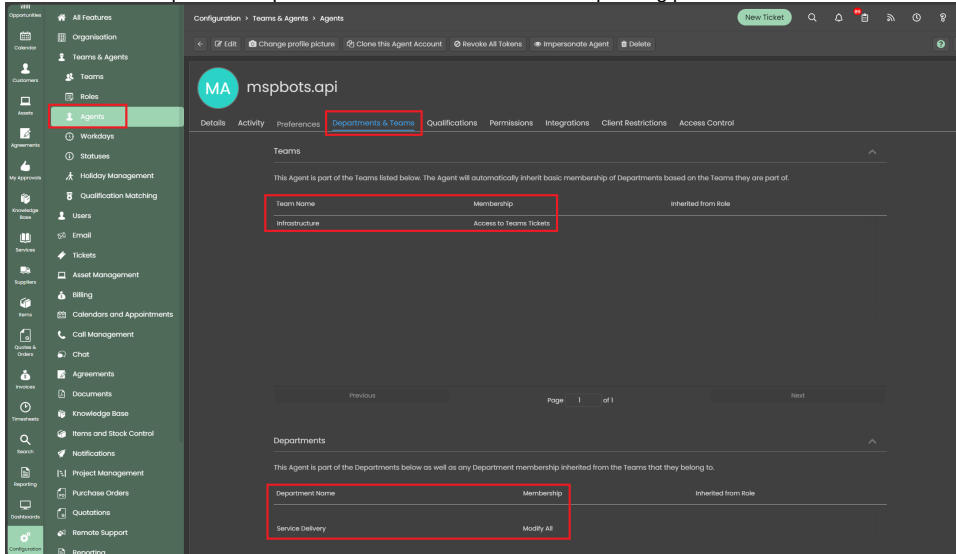
☐ edit:calendar

☐ read:customers

☐ edit:customers

☐ read:crm

- Ensure the user is part of a department or team that has the corresponding permissions to access the relevant data.



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

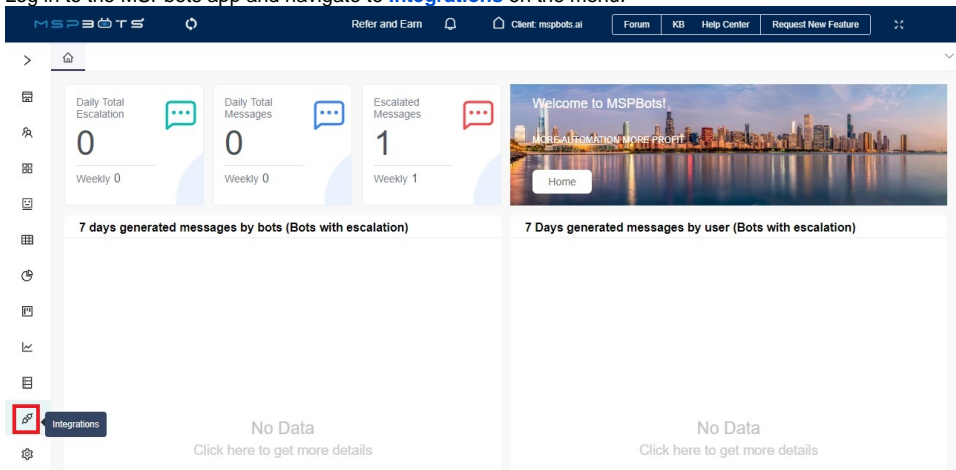
Refer to the [HaloPSA Guides](#) for the instructions on setting up the API permission.

2. How to set up the HaloPSA and MSPbots integration

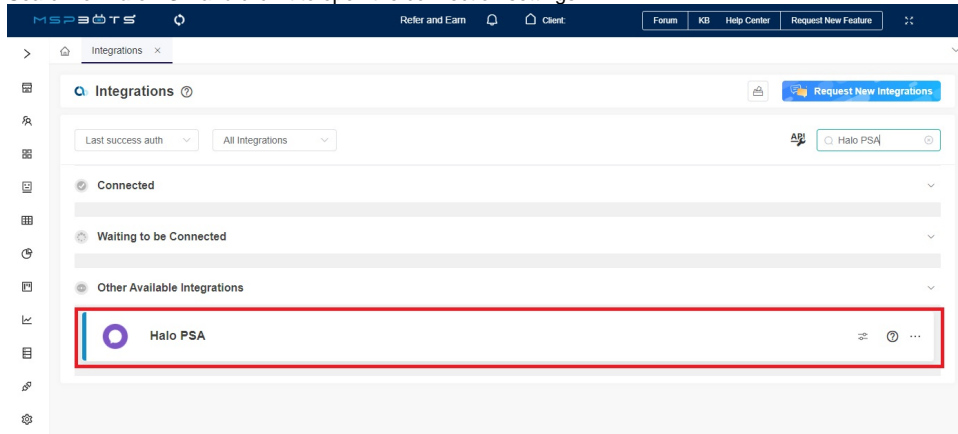
2.1. 1. Complete the [prerequisites](#) for the integration.

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

- Log in to the MSPbots app and navigate to [Integrations](#) on the menu.



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



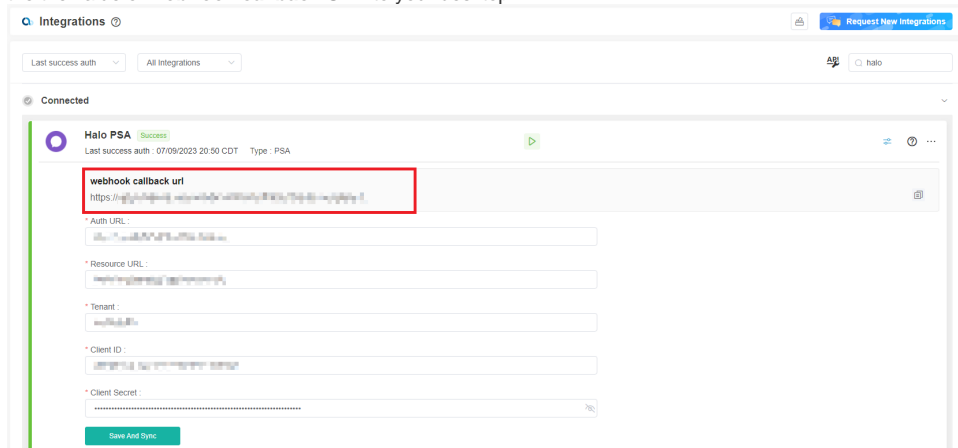
c. When the HaloPSA configuration settings appear, fill in all of the following required fields:

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

A screenshot of the 'Halo PSA' configuration settings form. The form is titled 'Halo PSA' and has a sidebar on the left with a purple circle icon. The main content area contains five required fields, each with a red asterisk and a placeholder text: 'Auth URL : Please Enter Auth URL', 'Resource URL : Please Enter Resource URL', 'Tenant : Please Enter Tenant', 'Client ID : Please Enter Client Id', and 'Client Secret : Please Enter Client Secret'. At the bottom of the form is a green button labeled 'Save And Sync'.

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 value of **webhook callback URL** to your desktop.



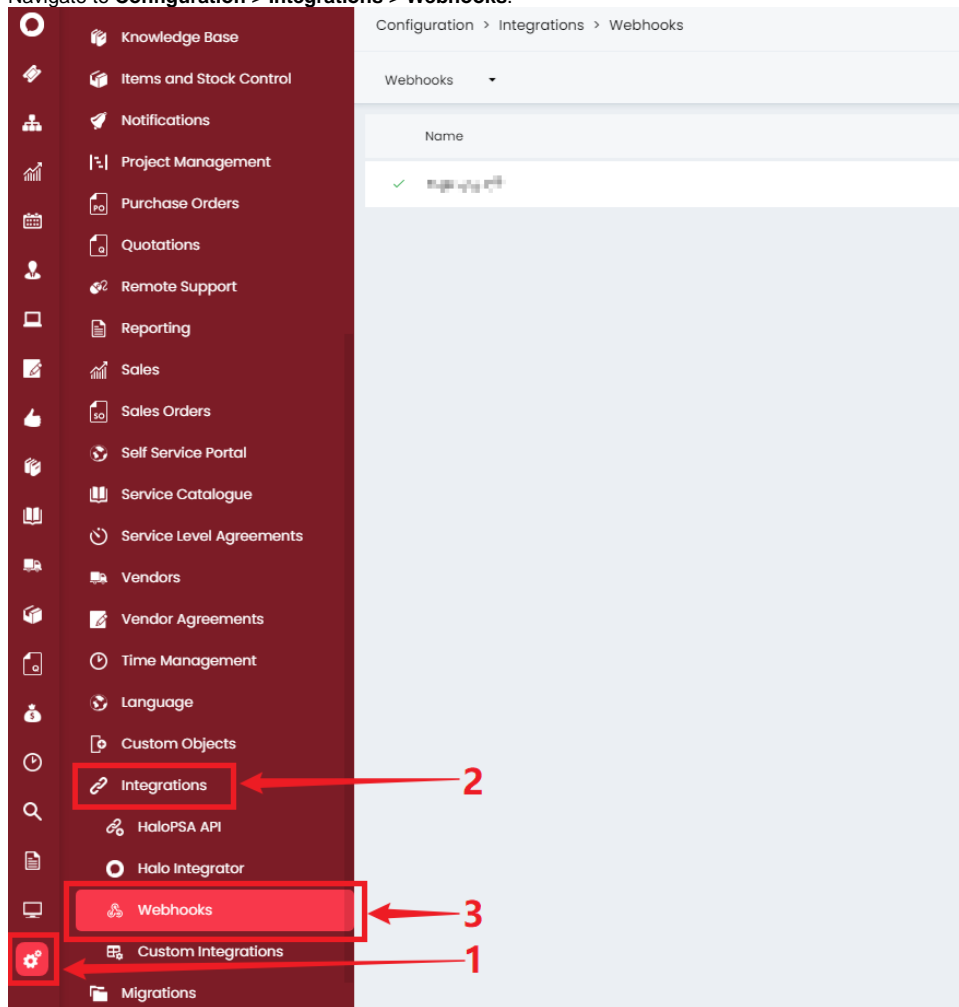
2.3. 3. Configure the HaloPSA webhook

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

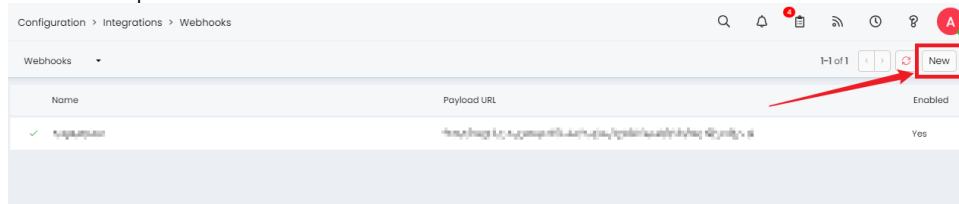
It is important to configure the webhook correctly. If not properly set, an incorrect webhook may affect the normal data synchronization adversely and trigger HaloPSA's request limit rate of 450 requests within 5 minutes. A correct webhook configuration request ensures that the system will not initiate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



c. Click **New** to open the New Webhook screen.



d. Fill in the fields for **Webhook Name** and **Payload URL**. You can leave the other fields with their default values.

- **Webhook Name** - Enter a unique webhook name.

Configuration > Integrations > Webhooks

← Save

New Webhook

Details Deliveries

Webhook Name
Enter a name for this Webhook here

Payload URL *

Webhook Type
Standard Webhook

Method
Post

Content Type
application/json

Authentication
No authentication

☒ Enabled

☐ Use a custom payload

Events

Choose which events trigger this webhook

- **Payload URL** - Enter the webhook callback URL from [Step 2.e](#).

e. Next, click the **Add** button to add a new event.

Configuration > Integrations > Webhooks

← Save

New Webhook

Details Deliveries

Authentication
No authentication

☒ Enabled

☐ Use a custom payload

Events

Choose which events trigger this webhook

Add




Name	Conditions
No rows found	

Previous Page 1 of 1 Next

Save Cancel

- f. On the New Event screen, select **Ticket Changed** from the Event dropdown menu.

Save



New Event

[Setup](#)

Event *

Ticket Changed

Ticket Changed

Add +

Field	Rule Type	Value
No rows found		

Previous

Page 1 of 1

Next

Save

Cancel

g. Click **Save** on the New Event screen.

Event *

Ticket Changed

All of the following criteria must be matched for this notification to be sent

Add +

Field	Rule Type	Value
No rows found		

Previous Page 1 of 1 Next

Save Cancel

h. Repeat Steps 3.e, 3.f and 3.g until all the following events are added.

- Ticket Changed
- New Ticket Logged
- Site created
- Site updated
- Site deleted
- User created
- User updated
- User deleted
- Invoice created
- Invoice updated
- Invoice deleted

i. Then click **Save** on the New Webhook screen to keep the configuration.

Configuration > Integrations > Webhooks

Save

New Webhook

Details Deliveries

Events

Choose which events trigger this webhook

Add +





















Name	Conditions
Customer created	0
Customer deleted	0
Customer updated	0
Site created	0
Site deleted	0
Site updated	0
Ticket Updated	0

Previous Page 1 of 1 Next

Save Cancel

3. What are the Webhook statuses and messages for the HaloPSA integration?

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

Status	Message
Webhook Successful	<div><div> Halo PSA Success</div><div>Last success auth: 04/01/2022 11:38 CST Type: PSA</div><div><div></div> Webhook Successful</div><div></div></div>
Webhook received no data for some events	<div><div> Halo PSA Success</div><div>Last success auth: 04/01/2022 11:38 CST Type: PSA</div><div><div></div> Webhook Received No Data For Some Events</div><div></div></div>
Webhook received no data	<div><div> Halo PSA</div><div>Last success auth: 04/01/2022 11:38 CST Type: PSA</div><div><div></div> Webhook Received No Data</div><div></div></div>
Webhook received no data within 4 days	<div><div> Halo PSA</div><div>Last success auth: 04/01/2022 11:38 CST Type: PSA</div><div><div></div> Webhook Received No Data Within 4 Days</div><div></div></div>

4. Related Topics

- [NextTicket Manager for Halo](#)
- [API Data Synchronization Failure or Pending in Halo Integration](#)
- [Halo Public Datasets](#)