



HaloPSA Integration

Fetches on 28/10/2026



Abstract

This article explains how to connect IRONSCALES to HaloPSA. You will learn how to prepare HaloPSA, complete the setup wizard, and link synced counts to your recurring invoices. The integration syncs daily usage for billing and creates HaloPSA tickets for IRONSCALES incidents.



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Introduction

The HaloPSA integration connects each IRONSCALES tenant to a HaloPSA client. It does two things:

- **Billing:** IRONSCALES writes daily usage counts to a subscription record for each client. Your billing then reflects actual seat counts.
- **Ticketing:** IRONSCALES creates a HaloPSA ticket for supported incidents. Your team can track and respond to threats in your professional services automation (PSA) tool.

Requirements and Limitations

- The integration is available to IRONSCALES managed service provider (MSP) partners only. Tenants cannot configure or view it.
- You set up the integration in the IRONSCALES setup wizard. API-based setup is not supported.
- Ticket sync is one way. Changes you make in HaloPSA do not sync back to IRONSCALES.

How IRONSCALES Maps to HaloPSA

IRONSCALES term	HaloPSA term	Description
Tenant	Client	IRONSCALES maps each tenant to one HaloPSA client.
Product or add-on	Item and subscription record	You own the item (name and price). The subscription carries the daily count.
Daily usage	Subscription count	IRONSCALES writes seat and add-on counts automatically.



IRONSCALES term	HaloPSA term	Description
No equivalent	Recurring invoice line	You create this line. It links the subscription to the client's bill.
Incident	Ticket	IRONSCALES creates a ticket for supported incidents.
Ticket queue or board	Ticket type	The ticket type sets the workflow, queue, and service level agreement (SLA) for IRONSCALES tickets.

Understanding Usage and Billing

HaloPSA uses four objects for billing:

Object	What it is	Who owns it
Item	The product in your catalog, with a name and price	You
Subscription	A per-client counter of IRONSCALES seats	IRONSCALES, updated daily
Recurring invoice	The client's monthly bill	You
Line	A row on that bill: your item, your price, and a quantity taken from the subscription	You

Syncing is not billing. IRONSCALES keeps the subscription count accurate every day. A count on a subscription does not appear on an invoice by itself. The invoice line must take its quantity from the IRONSCALES subscription. Without that link, the invoice bills the static quantity you typed, until you change it.

You create the link once for each client, in HaloPSA. See **Link Synced Counts to Your Invoices**.



IRONSCALES resets a count you edit by hand at the next sync. Do not edit the count.

How Syncing Works

- **Subscription destination:** In the wizard, you choose where IRONSCALES writes counts.
 - **Subscriptions tab:** We recommend this option. A recurring invoice line reads it with the quantity option **Calculate quantity from Subscription count on creation**.
 - **Software Licenses tab:** This option is supported. The linking works the same way, with the quantity option **Calculate quantity from Licence count on creation**. HaloPSA also fills this tab from Azure Partner Center, so IRONSCALES records appear with your Microsoft licensing.
- **Sync schedule:** IRONSCALES updates counts once a day at 09:30 UTC. If that run fails, a retry runs at 12:00 UTC. A sync also runs when you activate the integration.
- **Record creation:** On the first sync, IRONSCALES creates its own subscription record for each client and product. IRONSCALES names the record after the item you map in the wizard. Every sync after that finds the record by client, name, and the tab you chose, and updates only that record. IRONSCALES does not change records that have a different name.
- **Zero counts:** If a tenant's usage drops to zero, IRONSCALES writes a count of 0. The same happens when a product leaves the usage report. IRONSCALES does not delete the record. If a product has a count of 0 and no record, IRONSCALES creates nothing. HaloPSA has a setting named **Don't allow invoice lines with zero quantity**. This setting affects how such a line behaves on the invoice.
- **Pricing:** IRONSCALES writes quantities only. IRONSCALES does not write a price. Each subscription links to the item you map in wizard Step 4. Your price comes from your item or from the invoice line. Never price a line from the IRONSCALES record.



Preparing HaloPSA

Complete these HaloPSA steps before you open the IRONSCALES wizard.

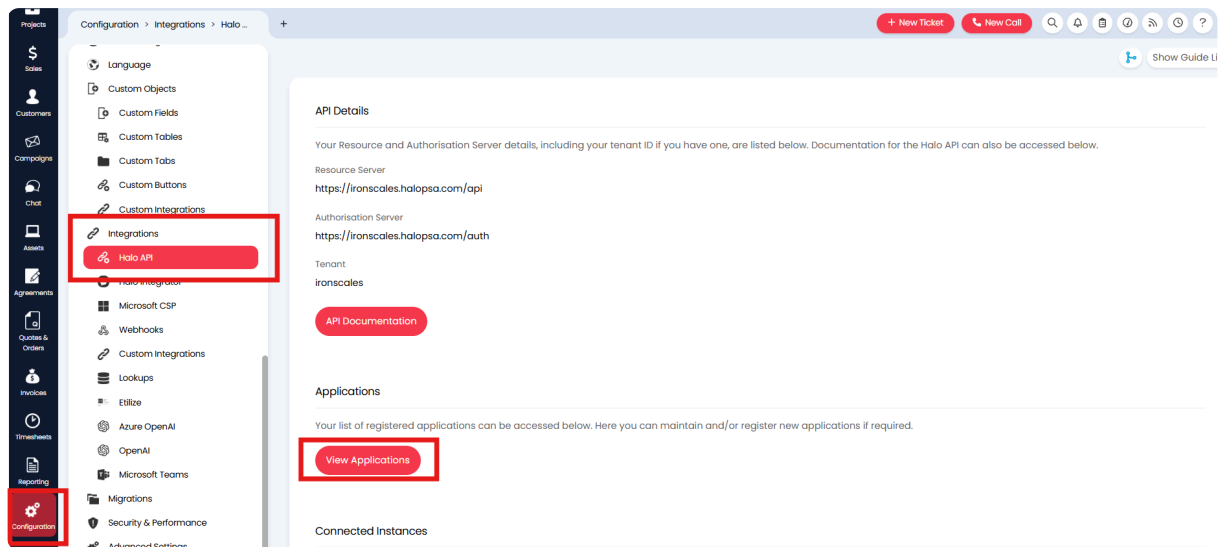
Create an API Agent

Create a dedicated agent for the API application:

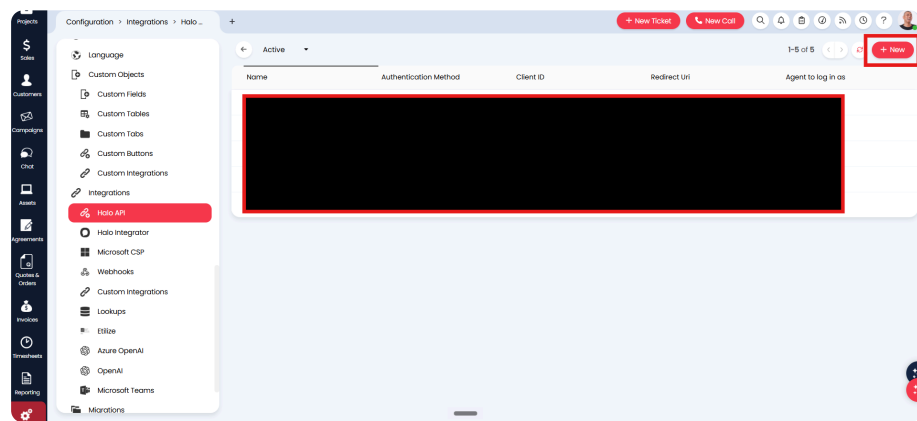
1. Go to **Configuration > Teams & Agents > Agents** and select **New**.
2. Tick **Is an API-only Agent**.
3. Save the agent. Then set its **Feature Access** as described in **Required Permissions** below.



Create an API Application



1. Go to **Configuration > Integrations > HaloPSA API**.



2. Select **View Applications**, then **New**.



Configuration > Integrations > Halo ...

Documents
Forecasting
Event Management
Knowledge Base
Items and Stock Control
Notifications
Project Management
Purchase Orders
Quotations
Remote Support
Reporting
Sales
Sales Orders
Self Service Portal
Service Catalogue
Service Level Agreements
Suppliers
Supplier Agreements
Time Management
Language
Custom Objects

Save

Add an Application

Details Permissions Security

Application Name *

IRONSCALES Integration

Description

☒ Active

Authentication Method *

☐ Username & Password

☐ Implicit Flow (Single Page Application)

☐ Authorisation Code (Native Application)

☒ Client ID and Secret (Services)

☐ **BETA** JWT Assertion (Services)

☐ API Key

- On the **Details** tab, enter an **Application Name**, for example **IRONSCALES Integration**. Keep **Active** ticked.
- Set **Authentication Method** to **Client ID and Secret (Services)**.

Configuration > Teams & Agents > A...

Service Desk
Organisation
Teams & Agents
Teams
Roles
Agents
Workbooks
Statuses
Holiday Management
Qualification Matching
Users
Email
Tickets
AI
Asset Management
Billing
Calendars and Appointments
Call Management
Chat
Agreements
PDF Templates
Documents
Forecasting
Event Management

Save

New Agent

Details Preferences

Password

Enter a password for the Agent to login here

Roles

Give Roles to an Agent to control their access permissions

☒ Account Active

☒ Is an API-only Agent

Be aware that API-only Agents may not log into the Web or Mobile Applications nor can they be assigned tickets. However, they do not take up a licence

Agent Details

First Name

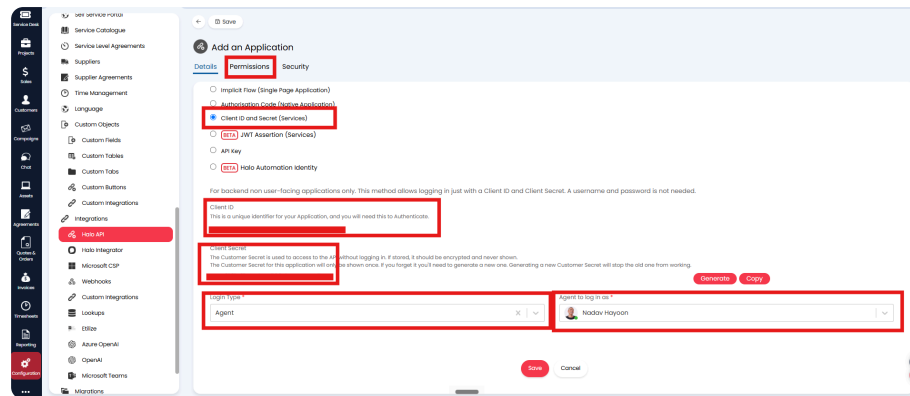
Surname

Initials

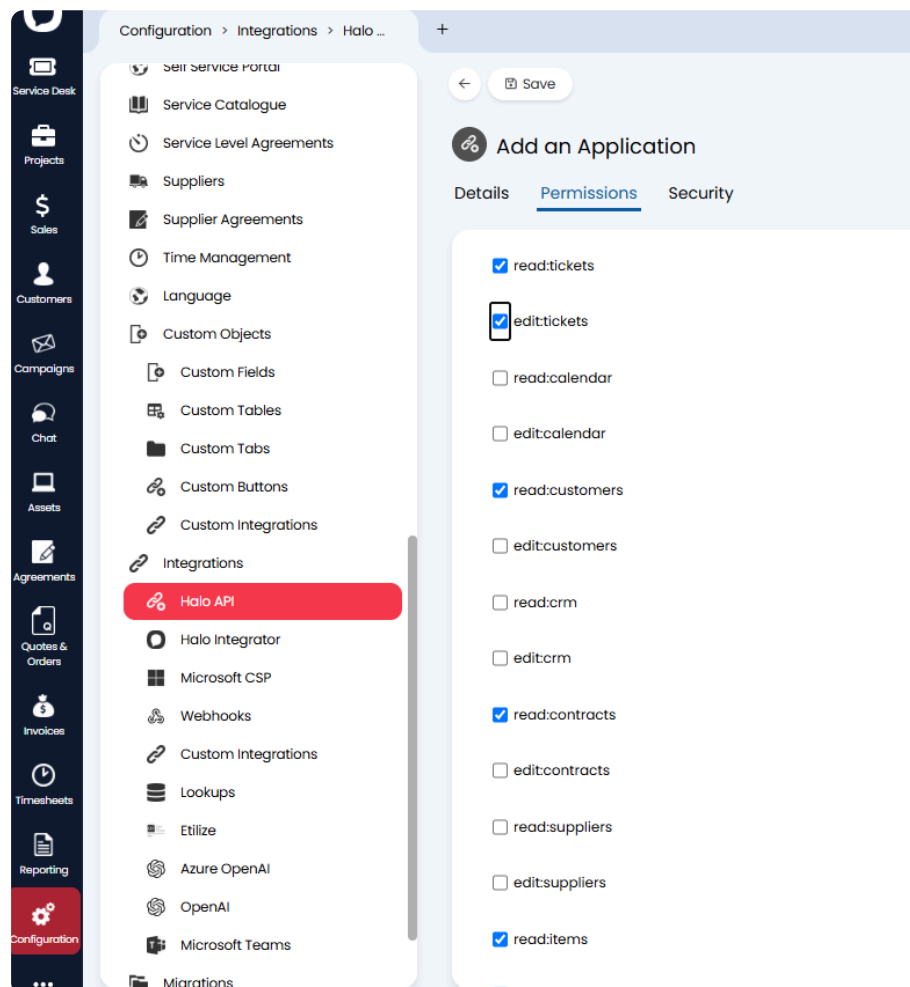
Phone

- Set **Login Type** to **Agent**. For **Agent to log in as**, select the API agent you created.





6. Copy the **Client ID** and **Client Secret**.



7. On the **Permissions** tab, tick the scopes in the table below.

8. Select **Save**.

Caution: HaloPSA shows the Client Secret only once. If you close the screen without copying it, you must generate a new secret.



Required Permissions

Grant the scopes for the features you will use when you create the application. To add a scope to an existing application, edit it in HaloPSA. Then select **Test connection** in the wizard again.

Feature	HaloPSA permission scope	What IRONSCALES uses it for
Always	<code>read:customers</code>	Reads your clients, so you can map them to IRONSCALES tenants
Billing	<code>read:items</code>	Lists your catalog items for wizard Step 4
Billing	<code>read:softwarelicensing</code>	Reads the subscription records
Billing	<code>edit:softwarelicensing</code>	Creates and updates the subscription records
Tickets	<code>read:tickets</code>	Reads ticket types and finds IRONSCALES tickets
Tickets	<code>edit:tickets</code>	Creates tickets, changes their status, and adds notes

Optional scopes: `edit:items` , `read:invoices` , and `edit:invoices` .

IRONSCALES does not use these scopes for any feature. You can grant them or leave them out. If an IRONSCALES feature needs them, add them to this API application (or create a new one). Then select **Test connection** in the wizard again.

The application gets only the access that both its scopes and its agent allow. On the agent's **Permissions** tab, under **Feature Access**, set at least the following:

- **Customers:** Read Only
- **Products:** Read Only
- **Software Licensing:** Read and Modify
- **Tickets:** Read and Modify



The connection test checks the read scopes only. It fails if `read:customers` is missing, and it names any other missing read scope. It cannot check the edit scopes. When you select **Next** on the Features step, IRONSCALES checks `read:customers` and the read scope for each feature you chose.

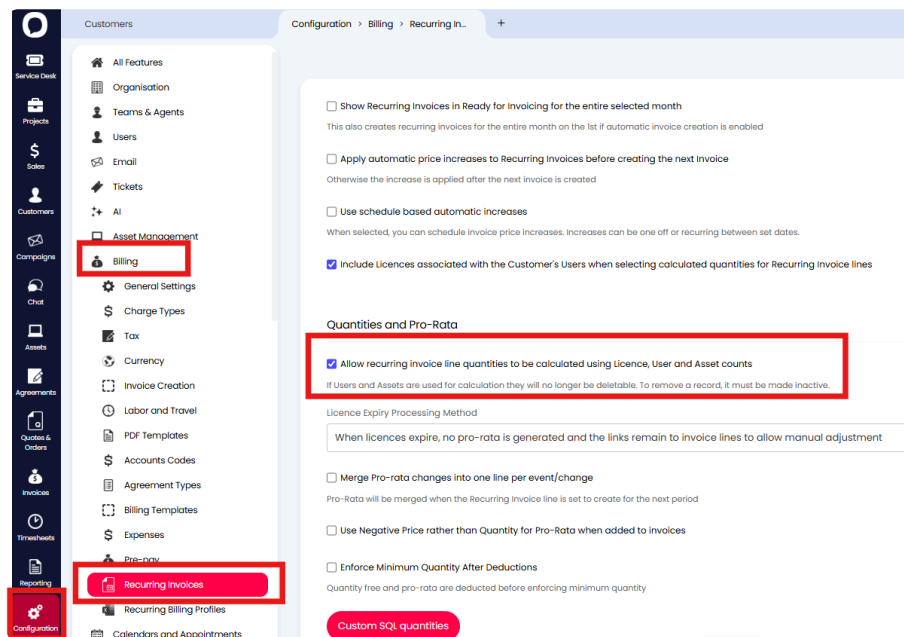
If the wizard reports missing permissions although the scopes are correct, check the agent's role.



Prepare Billing in HaloPSA

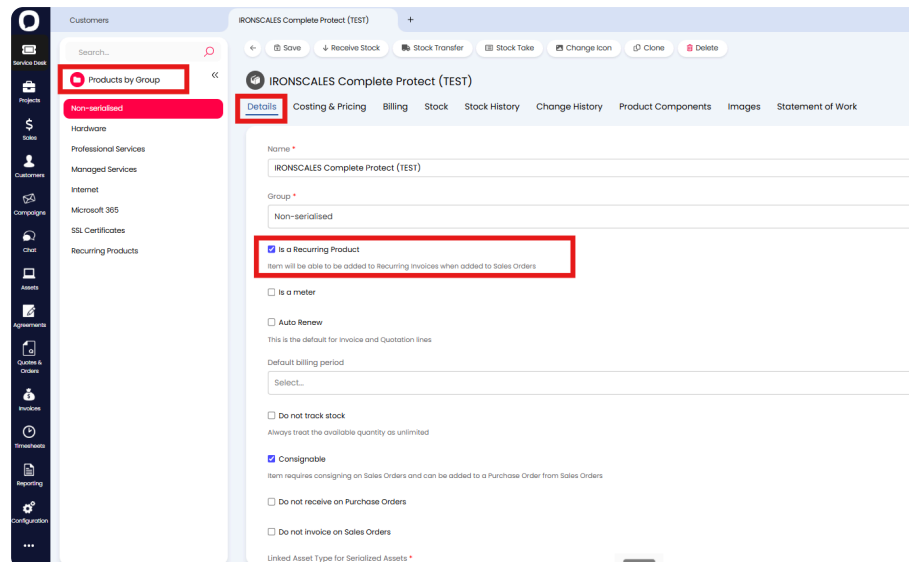
Skip this section if you use ticketing only. If you bill from usage, complete these steps before wizard Step 4.

1. Enable the count-based quantity setting. Go to **Configuration > Billing > Recurring Invoices**. In the **Quantities and Pro-Rata** section, tick **Allow recurring invoice line quantities to be calculated using Licence, User and Asset counts**. Without this setting, an invoice line cannot take its quantity from a count.



2. Create an item for each IRONSCALES product you bill. On the item's **Details** tab, tick **Is a Recurring Product**. This option lets you add the item to a recurring invoice. Set your price on the item's **Costing & Pricing** tab.





3. Check that each client you bill has a recurring invoice. You attach the IRONSCALES count to a line on that invoice in **Link Synced Counts to Your Invoices**.

Collect Required Details

- **HaloPSA URL:** The Resource Server URL from **Configuration > Integrations > HaloPSA API**. Enter the base URL without the `/api` suffix.
- **Client ID** and **Client Secret:** From the API application you created.

Using the IRONSCALES Wizard

Open the **Integrations** page and select the HaloPSA tile to start the wizard.

Step 1: Connect to HaloPSA

Enter the **HaloPSA URL**, **Client ID**, and **Client Secret** of the API application you created. Enter the URL without `/api`, for example `https://yourcompany.halopsa.com`. Select **Test connection**. A successful test lets you continue.



If the test fails, check the following:

- The URL is the address you use to open HaloPSA, without `/api` .
- The Client ID and Client Secret come from the API application you created.
- The application's **Authentication Method** is `Client ID and Secret (Services)` .

When you reopen the wizard, the saved secret stays hidden. Select **Replace** to enter a new secret.

Step 2: Features

HALOPSA HaloPSA

Cancel & leave

Steps

Connect

2 Features

3 Map clients

4 Billing

5 Tickets

6 Review and activate

2 Features

Choose what IRONSCALES sends to HaloPSA. You can change this later.

☒ Billing

Sends daily usage for IRONSCALES products to the matching HaloPSA client, so recurring invoices can bill it.

☒ Tickets

Opens a HaloPSA ticket for new IRONSCALES incidents and closes it when they're resolved.

Back

Next



Choose what IRONSCALES sends to HaloPSA. Both options are selected by default. You can change these options at any time.

- **Billing:** Sends daily usage for IRONSCALES products to the matching HaloPSA client, so recurring invoices can bill it. This option adds Step 4.
- **Tickets:** Creates HaloPSA tickets for IRONSCALES incidents and closes them when the incidents are resolved. This option adds Step 5.

Step 3: Map Your Clients

Match each IRONSCALES tenant to its HaloPSA client.

HALOPSA HaloPSA

Cancel & leave

Steps

✓ Connect

✓ Features

③ Map clients

✓ Billing

✓ Tickets

✓ Review and activate

③ Map your clients

Match each IRONSCALES tenant to its HaloPSA client. Tenants with Sync on send their usage and tickets to that client.

Search tenants

All (2)

Sync	IRONSCALES tenant	HaloPSA client
☒	Gates Ltd(company_10_profiles) wright.kennedy.net	Acorn Construction
☐	Joseph, Bentley and Knight(company... smith.clark.org	

Back

Next



Select the HaloPSA client for each tenant. Selecting a client turns **Sync** on for that tenant, and each row has a **Sync** toggle. Clear a client to remove the mapping and turn Sync off. Search by tenant name or domain, and use the **All**, **Mapped**, and **Unmapped** filters to find tenants that still need a client.

Tenants with no client, or with Sync off, send nothing to HaloPSA.

Step 4: Set Up Billing (Billing Only)

Choose where IRONSCALES records usage in HaloPSA:

- **Subscriptions (Recommended):** Adds an IRONSCALES subscription for each product a client uses, for every client with Sync on.
- **Software Licenses:** Records usage on the Software Licenses tab instead. Use this option if your invoices already bill from Software Licenses.

Both options bill the same way. Only the name of the quantity option on the invoice line differs.

Caution: If you change this choice after activation, new syncs write to the newly selected tab. IRONSCALES does not move existing records from the previous tab. Your billing team must remove them manually.

Match each product you bill to a HaloPSA item on the **Plans** and **Add-ons** tabs. The wizard does not create items. If an item is missing, create it in HaloPSA first, then select it. Each item can match only one product. With Billing on, at least one product or add-on needs an item. IRONSCALES does not bill a product that has no item.

Step 5: Configure Incident Tickets (Tickets Only)

Setting	What it does	Required
Ticket type	Sets the workflow, queue, and SLA. The status lists below come from this ticket type.	Yes
Assign to team	Sends tickets to a specific team. Leave it empty to use the HaloPSA default routing.	No



Setting	What it does	Required
Open status	IRONSCALES applies this status when it opens a ticket.	Yes
Closed status	IRONSCALES applies this status when the incident is resolved. If your technicians close tickets themselves, select a status that does not end the ticket, such as a review status.	Yes
Default priority	The priority given to every new IRONSCALES ticket.	Yes

Open status and Closed status must be different.

Select **Send test ticket** to check your settings. IRONSCALES creates a ticket for one of your synced clients and closes it right away. The test needs a ticket type, both statuses, a priority, and at least one synced client. Find the ticket in HaloPSA under that client. If the test fails, check the ticket type and team, and check that the two statuses differ. If IRONSCALES creates the test ticket but cannot close it, close it yourself in HaloPSA.

IRONSCALES loads ticket types, teams, statuses, and priorities from HaloPSA.

Step 6: Review and Activate

Select **Activate** on the review screen. Then:

- **Billing:** Usage syncs when you activate, and then daily. To bill the usage, you must still link each client's IRONSCALES subscription to its recurring invoice. See **Link Synced Counts to Your Invoices**.
- **Tickets:** IRONSCALES creates tickets for supported incidents.



Link Synced Counts to Your Invoices

Complete this section in HaloPSA after you activate the integration. IRONSCALES creates a subscription for each client and product with usage when the first sync runs. The steps take a few minutes for each client, and you do them once.



Customers Recurring Invoice IronScales Recurring Invoice IronScales +

Save Hide Inactive Lines Add Note Edit Columns Delete

Invoice Change History Internal Notes Attachments

Recurring Invoice (IronScales)

Composite Tax will be calculated when the invoice is saved. Due to limitations of rounding, lines with composite tax may not show an accurate representative line tax value compared to that line's contribution to total tax.

Add Recurring Item Add Product Add generic Product Add Product Bundle Add New Group Clone Lines from another Invoice Update Table Values

Description	SKU	Quantity	Price	Net Amount	Discount (%)	Tax	Product ID for Accounting Integr...
Non-serialised							
Email protect ++ [PeriodStartDate - PeriodEndDate]		26	0.00	0.00	0	0.00	
Apple Magic Keyboard [PeriodStartDate - PeriodEndDate]		500	40.00	20,000.00	0	4,000.00	

Net Total: 20,000.00
Tax: 4,000.00
Gross Total: 24,000.00
Total Profit: 5,000.00

1. Go to **Customers**, select the client, then select **Recurring Invoices**. You can also go to **Invoices > Recurring Invoices**. A client can have several recurring invoices, so open the one that bills IRONSCALES. Select **Edit**.
2. Select **Add Recurring Item** and select your IRONSCALES item.

Edit Line ID 77

You can use Agreement, Recurring Billing and Asset variables in the Description and Notes fields. View available variables.

Sequence * 5

Description * Email protect ++ [PeriodStartDate - PeriodEndDate]

Long description Email protect ++ For Period [PeriodStartDate - PeriodEndDate]

Group Non-serialised

Quantity

- Calculate quantity from Subscription count on creation
- Choose quantity
- Calculate quantity from licence count on creation
- Calculate quantity from user count on creation
- Calculate quantity from Asset count on creation
- Calculate quantity from Subscription count on creation
- Custom SQL quantity

Update Licences

Subscription Quantities

3. Open the line with the edit pencil. Under **Quantity**, select **Calculate quantity from Subscription count on creation**.

Add Subscription Quantity

Description * Email protect ++ for specific tenant IronScales [5]

Quantity 0

Minimum Quantity 0

Pro-rata

Pro-rata from the date the change occurred

A pro-rata line will be automatically added to the recurring invoice line when the count increases

☐ Update Invoice unit price when the linked subscription price changes

☐ Update Invoice unit cost when the linked subscription cost changes

Save Cancel



4. In the **Subscription Quantities** section, select **+ Add**. The **Add Subscription Quantity** dialog opens.
5. In **Subscription**, select the IRONSCALES subscription for this client by name. This is the link. The line's quantity comes from the record that IRONSCALES updates daily. Check the count in the list to pick the right record.
6. Leave **Update Invoice unit price when the linked subscription price changes** and the matching **unit cost** option unticked. IRONSCALES does not write a price to its subscriptions. If these options are on, HaloPSA can reprice your line to 0.
7. Select **Save** in the dialog. Set the **price** on the line, or use the item's price. Then save the invoice.

Repeat steps 2 to 7 for each IRONSCALES product that you bill this client for. If the subscription is missing from the list in step 5, check three things. The product has an item in wizard Step 4. The client is mapped with Sync on. The product has usage. Then wait for the next sync.

After this, each time HaloPSA creates this recurring invoice, the quantity comes from the IRONSCALES subscription, not a typed number.

Note: If you chose Software Licenses in wizard Step 4, the steps are the same but the names differ. Select **Calculate quantity from Licence count on creation**. Then select the IRONSCALES record in the **Licence Quantities** section.

Warning: Do not delete the IRONSCALES subscription. If you delete it, IRONSCALES creates a new subscription on the next sync. Then you must link the client's invoice line to the new subscription. Until you do, that line stops billing.

If You Already Bill IRONSCALES Manually

IRONSCALES creates its own subscription for each mapped client and updates only that record. IRONSCALES does not change your existing records that have a different name. If you already have a record with the exact name of the item you map, on the tab you chose, IRONSCALES updates it instead of creating a new one. To bill the synced usage, link your invoice line to the IRONSCALES subscription. Then remove or zero your old entry. Until you do, the invoice keeps billing your old count.



IRONSCALES Tickets in HaloPSA

When Tickets is on, IRONSCALES creates a HaloPSA ticket for these incident types:

- **Account takeover (ATO):** Account takeover incidents.
- **User Challenged:** Messages that IRONSCALES flags and presents to end users for verification.
- **Quarantine Release:** Requests to release quarantined messages.

Ticket behavior:

- **When IRONSCALES creates a ticket:** IRONSCALES creates a ticket when it reaches a verdict on an incident. For ATO incidents and release requests, IRONSCALES creates the ticket right away.
- **Auto-resolved incidents:** If an incident is already auto-resolved when IRONSCALES processes the event, IRONSCALES creates no ticket.
- **Closing:** When an incident is resolved, IRONSCALES sets the ticket to your Closed status and adds a note with the verdict. If the verdict changes after the close, IRONSCALES adds a note that starts with **VERDICT UPDATED**.
- **Release requests:** For email incidents, a safe verdict closes both the incident ticket and its release-request ticket.
- **Notes:** Close notes are internal. End users cannot see them, and IRONSCALES never emails them.
- **Deleted tickets:** If you delete or merge an IRONSCALES ticket in HaloPSA, IRONSCALES does not create it again.
- **Who closes:** The IRONSCALES agent closes the ticket, not a technician. A final status (a status that ends the ticket) blocks technician time entry in HaloPSA. To credit a technician, select a status that does not end the ticket. The technician then closes it.



Ticket Title

IRONSCALES names each ticket in this format: `IRONSCALES-<event type>-IS-<report ID>-<recipient>` . The recipient is the affected user. For example:
`IRONSCALES-Account Takeover-IS-123456-john.doe@acme.com` .

