Halo

The Halo integration imports tickets from your Halo instance into Alchemer Voice as support conversations, along with your Halo clients and users. The integration is read-only. Because you create the API application in your own Halo instance, you control its access and can revoke it at any time.

What's imported

Item	Behavior
Tickets	Imported with their actions as comments. Only ticket types that end users can select are imported. Private actions, system actions, and actions with no note aren't imported.
Clients and users	Halo clients become accounts and Halo users become contacts. Clients of Halo's internal customer type are skipped, along with their users and tickets. Refreshed daily.
Frequency	Tickets are checked every 5 minutes, and changed tickets are imported again.

Set up

Before you begin

- A Halo administrator who can create an application under **Configuration** > **Integrations** > **Halo API**.
- The domain of your Halo instance, for example mycompany.halopsa.com.
- The **Manage connections** permission in Alchemer Voice. See Roles and permissions.

Steps

1. In Halo, go to **Configuration** > **Integrations** > **Halo API** , open **View Applications**, and create a new application.
2. Set the **Authentication Method** to **Client ID and Secret (Services)**.
3. Set the **Login Type** to an agent with read-only access to tickets, clients, and users.
4. Under **Permissions**, grant read access to tickets, actions, clients, and users only.
5. Save the application and copy its **Client ID** and **Client Secret**. The Halo API page also lists your Resource Server, Authorisation Server, and Tenant values.
6. In Alchemer Voice, go to **Admin** > **Connections**, find **Halo** under **Service management**, and click **Connect**.

7. Enter the Halo **Domain** (without /api).
8. Enter the **Tenant** if your Halo instance uses one. It's optional and defaults to the first part of the domain.
9. Enter the **Client ID** and **Client Secret**, then click **Connect**.

Troubleshooting

- **"Please enter the public domain of your Halo instance":** Enter the address you use to sign in to Halo, for example mycompany.halopsa.com. Private or internal addresses can't be used.
- **"Halo rejected the provided credentials":** Check the Client ID and Client Secret, that the Authentication Method is Client ID and Secret (Services), and the Tenant if you entered one.
- **Authentication failed:** Halo no longer accepts Alchemer Voice's access, for example because the application was deleted or the secret changed. Click **Disconnect**, then **Connect** and enter the current details.
- **Tickets are missing:** Check that the ticket type can be selected by end users and that the ticket belongs to a client that isn't of the internal customer type. Tickets whose actions are all private or empty arrive with no comments.

Disconnecting removes the saved credentials. Conversations already imported stay in Alchemer Voice.

Permissions

Connecting and disconnecting Halo requires the **Manage connections** permission, which admins usually have. Without it, you can't connect or disconnect Halo. See Roles and permissions.

If you need help, contact Alchemer Support.

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