

AISOC INTEGRATION GUIDE

This guide contains the information required to integrate HaloPSA with AISOC.

AISOC uses the HaloPSA API to create, update, and retrieve ticket information.

INFORMATION REQUIRED

The AISOC team will collaborate closely with you to set up the integration. Typically, we will need to gather specific configuration details, but the exact requirements may vary depending on your HaloPSA setup.

- Client id and client secret: AISOC uses these fields for authentication to the Halo API. It can be obtained in a call together, alternatively we can share steps to obtain them.
- Halo domain (organisation): organisation name in halo.<organisation>.com
- Ticket type: AISOC will create tickets using an existing Halo ticket type and will search for tickets using this type. We recommend the ticket type to be unique to AISOC, i.e. a new ticket type to be created for AISOC (e.g. "Incident - AISOC", or "Alert - AISOC"). Alternatively, AISOC could use an existing ticket type (e.g. a pre-defined ITIL ticket type).
- End-user: AISOC will create tickets under a user, which would typically be a "general user" to avoid sending emails to a specific email address on ticket creation and when notes are added to the ticket. This can also be set to a specific user based on your requirements. After ticket creation, when the ticket gets assigned to an agent, they will be notified based on your Halo settings.
- Agent: by default, AISOC will assign a ticket to a team and load balancing or round robin would be applied based on your Halo settings (see below), unless you would like tickets to be assigned to a specific agent/user.
- Team: AISOC uses it to assign tickets within an existing team in Halo (e.g. "Security team"), typically using load balancing or round robin based on your Halo settings of the ticket type.
- Customer(s): names of customer(s) under which tickets would be created, whether it is only under your organisation name or your customers (e.g. "contoso").

- Source: the pre-defined Halo source of the ticket set at creation (e.g. "Email").
- Category: the pre-defined Halo category of a ticket set at creation (e.g. "Security").
- Priorities: range of priorities you would like AISOC to use for ticket creation (e.g. "P1 - P4").
- SLA: whether to exclude the ticket from SLA or not (yes or no).

CUSTOM FIELD CONSIDERATIONS

If your Halo configuration includes mandatory or custom fields beyond the standard setup, please let us know. Some of the fields we typically request may also be optional depending on your specific configuration.