# HaloPSA Getting Started Guide

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# HaloPSA Getting Started Guide

*A practical field guide for your first 30 days of implementation*

A practical implementation resource from Visionary 360

**Purpose**
This guide explains what to do first, what to avoid, and how to turn a new HaloPSA instance into a working operational platform. It is written for teams that want a clear path, not a product brochure.

## The First 30 Days at a Glance

| Period | Focus | Exit Criteria |
|---|---|---|
| Week 1 | Access, project setup, discovery, data collection, sandbox validation. | Everyone can log in, project workspace exists, data owners assigned. |
| Week 2 | Organisation, teams, roles, customers, sites, users, email foundation. | Core structure exists and inbound/outbound email design is known. |
| Week 3 | Tickets, statuses, actions, SLAs, workflows, time tracking, charge types. | Service desk can process work end-to-end in test scenarios. |
| Week 4 | Billing validation, integrations, training, go-live preparation. | Test invoices, workflow routing, portal access, and agent readiness validated. |

## 1. Learn the HaloPSA Mental Model

Before configuring details, understand how the platform thinks. Most confusion comes from not knowing which object controls which behavior.

| Concept | What It Controls |
|---|---|
| Organisation → Department → Team → Agent | Your internal structure, queue visibility, assignment, and permissions. |
| Customer → Site → User | Your client structure: companies, locations, and end users who raise tickets. |
| Tickets | The work object used for incidents, requests, projects, sales opportunities, changes, and more. |
| Ticket Types | Different kinds of work with different fields, workflows, statuses, SLAs, and behavior. |
| Actions | What agents do on tickets: reply, update, escalate, log time, close, approve, and so on. |
| Workflows | The allowed lifecycle and actions for a ticket type. |
| Agreements / Contracts | The commercial rules for service coverage and recurring billing. |
| Charge Types | How time is categorized for billing, reporting, and invoicing. |

**Practical Tip**
When something behaves unexpectedly, trace it back to the controlling object. Is it the ticket type, workflow, action, SLA, team, role, agreement, or customer record?

## 2. Start With the Foundation

Build in dependency order. Do not configure billing automations before customers, products, and agreements are clean. Do not configure complex workflows before ticket types and statuses are settled.

| Step | Task | Why It Comes Here |
| --- | --- | --- |
| 1 | Verify production and sandbox access. | Prevents access delays and unsafe testing in production. |
| 2 | Confirm organisation details, timezone, business hours, branding basics. | Affects communications, SLAs, and system identity. |
| 3 | Create departments, teams, agents, and roles. | Controls queue visibility and assignment. |
| 4 | Import or create customers, sites, and users. | Everything operational ties back to customers. |
| 5 | Connect email mailboxes and templates. | Turns communications into reliable ticket intake and updates. |
| 6 | Configure ticket types, statuses, actions, categories, SLAs. | Defines how work moves through the service desk. |
| 7 | Configure workflows and assignment rules. | Automates routing and standardizes process. |
| 8 | Configure time tracking, charge types, billing basics. | Connects service delivery to revenue. |
| 9 | Validate integrations. | Confirms connected systems exchange the expected data. |
| 10 | Train, test, and go live. | Launch only when users can perform core tasks. |

## 3. Your First Configuration Decisions

These decisions should be recorded in the project workbook or implementation notes before build work proceeds.

| Area | Decision Prompt | Decision / Notes |
| --- | --- | --- |
| Teams | What queues do agents actually work from each day? | |
| Roles | What should technicians, dispatchers, managers, finance, sales, and admins be able to see or edit? | |
| Ticket Types | Which request types need different forms or workflows? | |
| Statuses | Which statuses are meaningful for agents and customers? Avoid creating too many. | |
| Priorities | How is priority determined: impact, urgency, customer type, agreement, or manual triage? | |
| SLAs | Which timers matter and which business hours do they follow? | |
| Email Templates | What should customers receive when a ticket is created, updated, or closed? | |
| Time Entries | What is required for billable, non-billable, included, project, and after-hours work? | |
| Billing | Which charges are recurring, variable, prepaid, fixed fee, or one-off? | |

## 4. Build a Minimum Viable Service Desk

A reliable service desk is the heart of a successful HaloPSA launch. Start with a manageable set of ticket types and workflows.

- Begin with Incident and Service Request unless your business has a clear reason to split more work types on day one.
- Define a simple ticket lifecycle: New, In Triage, In Progress, Waiting on Customer, Waiting on Vendor, Resolved, Closed.
- Configure the essential actions agents need to work tickets without confusion.
- Create field lists that capture necessary information but do not slow down intake.
- Use categories for reporting and routing, not as a dumping ground for every possible problem.
- Validate that inbound email, manual tickets, and portal tickets land in the right queues.
- Confirm customer-facing email templates are professional and readable.

| Test | Expected Result | Pass / Notes |
|---|---|---|
| Email Intake | Send an email to support mailbox; confirm ticket created with correct customer/user/team. | |
| Manual Ticket | Create a ticket as an agent; confirm required fields and default values. | |
| Portal Ticket | Submit as an end user; confirm form, confirmation message, and ticket visibility. | |
| Assignment | Apply category/priority/team rule; confirm routing and notifications. | |
| SLA | Create a priority ticket; confirm response and resolution timers use expected business hours. | |
| Agent Update | Reply to customer; confirm email format and ticket history. | |
| Closure | Close ticket; confirm resolution note, customer notification, and status. | |

## 5. Get Billing Right Before You Trust Automation

Billing configuration deserves careful validation. Small errors can create customer-facing problems quickly.

| Billing Area | What to Validate | Owner / Notes |
|---|---|---|
| Charge Types | Define what time means commercially: included, billable, no charge, project, after-hours, travel. | |
| Products / Items | Clean catalogue; identify recurring products and one-time items. | |
| Agreements | Confirm customer, start date, billing frequency, inclusions, exclusions, and rates. | |
| Recurring Invoices | Validate lines, schedule, quantities, taxes, and accounting mapping. | |
| Invoice Sync | Test one invoice type at a time: labor, product, recurring, project if applicable. | |
| Finance Approval | Finance validates sample invoices before automation is trusted. | |

**Billing Rule**

Never go live with billing automation based only on configuration review. Create test scenarios and have finance verify the output before enabling production invoice workflows.

## 6. Integrations to Plan Early

Integrations are often dependent on security approvals, API permissions, vendor settings, and data mapping. Start planning them before the week you need them.

| Integration | Planning Focus | Typical Timing |
|---|---|---|
| Email | Inbound ticket creation, outbound notifications, mailbox permissions, signatures. | Day-one for service desk. |
| Identity / SSO | Agent authentication, security groups, MFA, role mapping. | Day-one if required by policy. |
| Accounting | Customers, products, invoices, tax codes, accounts codes. | Day-one if billing launches with HaloPSA. |
| RMM | Asset sync, alert ticket creation, customer/site mapping. | High value, but can be phased if needed. |
| Documentation | Customer context, passwords, knowledge links, operational handoff. | Often phase 1.5 depending on process. |
| CSP / Licensing | User/license sync and recurring billing inputs. | Important if license billing is part of launch. |
| Portal | Branding, authentication, ticket visibility, service catalogue. | Can be simple at first, expanded later. |

## 7. Training Plan by Role

Do not train everyone on everything. Train each role on the tasks they need to perform confidently at go-live.

| Audience | Training Scope | Competency Target |
|---|---|---|
| Administrators | Configuration navigation, user/role management, templates, workflows, logs, troubleshooting. | Can explain where key settings live and safely make minor changes. |
| Service Desk Agents | Ticket intake, triage, updates, time entry, closure, searching, queues, notifications. | Can process a ticket from creation to closure without help. |
| Team Leads | Queue management, escalations, approvals, reports, quality checks. | Can monitor team workload and resolve process questions. |
| Finance | Agreements, charge review, invoice generation, sync validation, exceptions. | Can validate charges and invoice accuracy. |
| Managers | Dashboards, reports, SLA visibility, operational metrics. | Can use HaloPSA to manage the business, not just view activity. |
| End Users | Portal login, submitting requests, reviewing ticket status, responding to updates. | Can submit and track requests with minimal friction. |

## 8. Go-Live Readiness Checklist

Use this list before moving from configuration to production operations.

| Area | Definition of Done | Pass / Notes |
|---|---|---|
| Agent access | All agents can log in, see correct modules, and access queues. | |
| Customer records | Sample customers, sites, users, contacts, and domains validated. | |
| Email | Inbound and outbound messages tested; templates approved. | |
| Tickets | Core ticket types, statuses, actions, priorities, categories, and fields tested. | |
| SLAs | Timers calculate correctly for business hours and priorities. | |
| Workflows | Routing, escalation, approvals, and notifications tested. | |
| Time tracking | Agents can log time with correct charge types and notes. | |
| Billing | Sample invoices match finance expectations. | |
| Integrations | Connected systems sync successfully and errors are monitored. | |
| Training | Role-based training complete; support path known. | |
| Cutover | Go/no-go owner, rollback path, issue log, and communication plan prepared. | |

## 9. First Week After Go-Live

The first week is about stabilization, not perfection. Capture issues, distinguish training gaps from configuration defects, and avoid making major changes without review.

| Activity | Purpose | Cadence |
|---|---|---|
| Daily 10-minute check-in | Review blockers, ticket routing issues, user confusion, and urgent configuration fixes. | Days 1-5. |
| Issue triage | Classify as training, data, configuration, integration, or enhancement. | Prevents everything becoming an emergency. |
| Email review | Confirm tickets are not duplicated, missed, or assigned incorrectly. | Daily. |
| SLA review | Confirm timers and breaches behave as expected. | Daily for first week. |
| Billing hold | Review charge entries before sending first production invoices. | Until finance signs off. |
| Enhancement backlog | Park non-critical improvements for phase two. | Protects stability. |

## 10. What Good Looks Like

A successful first implementation phase does not mean every feature is enabled. It means the core business process works reliably.

- Agents know where to find their work and how to update it.
- Tickets enter from the expected channels and route to the correct queues.
- Customers receive clear communications.
- SLAs, priorities, and business hours are understandable and accurate.
- Time entries and charge types support accurate billing.
- Finance can validate invoices before customers receive them.
- Managers can see basic operational health.
- Enhancements are tracked without destabilizing the live system.

## Source Basis

This guide is based on Visionary 360 implementation curriculum concepts, HaloPSA Academy onboarding structure, and field implementation practices. It is intended as a planning and enablement document, not a replacement for your project workbook, configuration notes, or HaloPSA administrator documentation.

**How to use this document**

Use it to prepare stakeholders, gather decisions, and avoid common blockers before your implementation begins. During a live project, convert each checklist item into a named task with an owner and due date.