



HaloPSA Before You Start Readiness Guide

Visionary 360, Inc.
9018 Balboa Blvd. #563
Northridge, CA 91325
818-459-3950
www.visionary360.com

Before You Start HaloPSA

Implementation readiness guide for DIY, hybrid, and consultant-led projects

A practical implementation resource from Visionary 360

Executive Summary

A successful HaloPSA implementation is rarely blocked by the software. It is usually delayed by unclear ownership, incomplete data, missing access, undecided processes, or insufficient testing time. This guide helps your team prepare before configuration begins.

Who This Guide Is For

- MSP owners and operations leaders preparing for HaloPSA.
- Service desk managers who need to translate current processes into HaloPSA workflows.
- Finance and billing stakeholders responsible for agreements, charge rates, invoicing, and accounting integrations.
- Internal implementation leads deciding whether to implement DIY, with a consultant, or through a hybrid approach.

The Core Principle

Do not start with configuration. Start with decisions, data, access, and testing discipline. HaloPSA is highly configurable; that flexibility is a strength only when your team knows what the business process should be.

Common Implementation Mistake

Treating HaloPSA setup as a background task. Your consultant can guide and configure, but your team must supply decisions, data exports, validation, process ownership, and user adoption effort.

1. Decide Your Implementation Approach

There is no universal right answer. The right approach depends on your timeline, internal capacity, complexity, and appetite for rework.

Approach	Best Advantages	Main Risks	Best Fit
DIY	Lower cost; deeper internal learning; useful for simple environments.	Requires strong internal ownership; higher risk of misconfiguration; slower if requirements are unclear.	Small teams with technical admin capacity and simple billing.
Consultant-Led	Structured methodology; faster decisions; better use of best practices; less rework.	Requires budget and stakeholder availability; still needs client-side ownership.	Busy teams, complex billing, multiple integrations, or tight go-live dates.
Hybrid	Balanced cost and control; consultant handles critical architecture while internal team owns simpler build tasks.	Requires clear division of responsibilities and strong project management.	Most MSPs that want enablement plus expert guardrails.

2. Assign the Real Project Team

HaloPSA touches service delivery, finance, sales, projects, reporting, and customer experience. A single technical admin cannot make every decision alone.

Role	Responsibility	Why It Matters
Executive Sponsor	Owens priority, budget, scope decisions, and go/no-go approval.	Approves tradeoffs and removes blockers.
Implementation Lead	Coordinates tasks, meetings, documentation, and follow-up.	Keeps the project moving between consultant sessions.
Service Desk Lead	Defines tickets, statuses, queues, SLAs, workflows, and escalation logic.	Validates agent workflow usability.
Billing / Finance Lead	Defines agreements, charge types, products, taxes, recurring invoices, and accounting sync expectations.	Validates invoice accuracy.
Data / Migration Lead	Owens exports, cleanup, mapping, imports, and sample validation.	Prevents bad data from becoming permanent.
Integration Owner	Provides access for email, identity, RMM, documentation, accounting, CSP, and other connected systems.	Coordinates credentials and vendor approvals.
Training Champion	Helps document procedures and supports agent adoption.	Turns configuration into daily habits.

3. Confirm Access Before the First Build Session

Access delays are one of the fastest ways to lose implementation momentum. Validate every credential and approval path before configuration work begins.

System	Required Before Configuration	Owner / Notes
HaloPSA Tenant	Production URL, admin credentials, license count, enabled modules.	
Sandbox	Sandbox requested/available, clearly marked, and safe for training or testing.	
Email Platform	Microsoft 365 or Google Workspace admin access, service account plan, mailbox list.	
Accounting	QuickBooks, Xero, Sage, or other accounting admin access and chart-of-account expectations.	
Identity / SSO	Entra ID or identity provider admin access, security groups, MFA requirements.	
RMM / Documentation	API credentials, integration permissions, mapping decisions.	
Legacy PSA	Export permissions, migration fields, historical ticket scope, attachments decision.	
DNS / Portal	Subdomain decisions, portal URL, branding assets, DNS owner identified.	

4. Clean the Data Before Importing It

HaloPSA will reflect the quality of the data you import. Clean, consistent data makes configuration and reporting easier; messy data creates confusing tickets, billing issues, and poor adoption.

Data Set	Preparation Standard	Why It Matters
Customers	Duplicate names removed; inactive customers excluded or tagged; billing names aligned.	Customer records are the anchor for sites, users, assets, agreements, tickets, and invoices.
Sites	Addresses standardized; primary site identified; remote-only clients handled consistently.	Sites influence routing, contacts, assets, service scope, and reporting.
Users	Email addresses valid; VIPs identified; inactive users removed; domain mapping checked.	Users create tickets and drive portal access and communication.
Agents	Active employees only; roles and teams planned; managers identified.	Permissions and queue visibility depend on agent setup.
Assets	Serial numbers, hostnames, device ownership, asset type, and customer/site links cleaned.	Bad asset mapping creates unreliable support history and automation.
Agreements	Active contracts reviewed; billing cycle, start dates, inclusions, exclusions, and rates confirmed.	Billing accuracy depends on contract quality.
Products / Services	Catalogue rationalized; recurring products identified; old SKUs retired.	Quotes, invoices, and recurring schedules depend on item structure.
Historical Tickets	Decide migration depth; avoid importing years of noise unless required.	Ticket history can be useful, but excessive migration adds cost and complexity.

5. Document Current-State Processes

Do not copy every legacy process. Capture the current state, decide what should change, then configure the future state intentionally.

- How do tickets enter today: email, portal, phone, RMM alert, chat, manual entry?
- How are tickets triaged, prioritized, assigned, escalated, and closed?
- Which SLA commitments are contractual versus internal targets?
- What work is billable, covered, no charge, project, after-hours, or excluded?
- How are approvals handled for service requests, purchases, changes, and projects?
- What reports are actually used for management decisions?
- Which workflows are mandatory on day one, and which can wait until phase two?

6. Decide Your Phase 1 Scope

A strong Phase 1 gives the business a stable service and billing foundation. It does not need to include every advanced feature on day one.

Scope Category	Recommended Treatment
Usually Phase 1	Organisation, teams, roles, customers, sites, users, email, core ticket types, SLAs, workflows, time tracking, basic billing, essential integrations, training, go-live validation.
Often Phase 1.5 / Phase 2	Self-service portal enhancements, service catalogue, advanced approvals, reporting dashboards, sales pipeline, project templates, inventory, suppliers, knowledge base, advanced automation.
Avoid in Phase 1 Unless Required	Over-customized PDF templates, complex multi-stage automations, excessive custom fields, full historical ticket migration, advanced BI, non-essential integrations.

7. Make the Hard Decisions Early

The following decisions shape the entire build. Capture them before configuration begins.

Decision Area	Question to Answer	Decision / Owner
Customer Hierarchy	What is the source of truth for customers, sites, and users?	
Team Structure	Will teams reflect departments, queues, escalation tiers, customer pods, or service lines?	
Roles and Permissions	Who can view billing, edit configuration, approve work, close tickets, and see other agents' tickets?	
Ticket Types	Which work types need different forms, workflows, SLAs, or reporting?	
SLA Model	Which priorities exist, how are they set, and what business hours apply?	
Billing Model	What is included, excluded, billable, recurring, prepaid, fixed fee, or project-based?	
Go-Live Strategy	Big bang, phased, or parallel operation? What risk level is acceptable?	
Training Strategy	Who must be trained before go-live, and what competency must they demonstrate?	

8. Readiness Scorecard

Use this simple scorecard to determine whether your team is ready to begin configuration.

Readiness Factor	Score
Project ownership assigned	0 / 1 / 2 / 3 / 4 / 5
All required access confirmed	0 / 1 / 2 / 3 / 4 / 5
Customer/site/user data cleaned	0 / 1 / 2 / 3 / 4 / 5
Billing model documented	0 / 1 / 2 / 3 / 4 / 5
Service desk process documented	0 / 1 / 2 / 3 / 4 / 5
Integration owners identified	0 / 1 / 2 / 3 / 4 / 5
Training plan drafted	0 / 1 / 2 / 3 / 4 / 5
Go-live risk tolerance agreed	0 / 1 / 2 / 3 / 4 / 5

Scoring Guidance

32-40: ready to start. 24-31: start only if gaps have owners and due dates. Below 24: pause and prepare; otherwise the implementation will likely stall or require rework.

9. Pre-Implementation Checklist

Convert this list into tasks before the project kickoff.

Task	Definition of Done	Owner / Due Date
Confirm implementation approach	DIY, consultant-led, or hybrid selected.	
Create shared project space	Workbook, decisions log, exports, notes, recordings, and issue tracker organized.	
Set recurring meeting cadence	Implementation sessions, internal working blocks, validation checkpoints.	
Collect admin credentials	HaloPSA, email, accounting, identity, RMM, documentation, CSP, legacy PSA.	
Export and clean data	Customers, sites, users, agents, assets, agreements, products, tickets if needed.	
Define Phase 1	Required day-one modules and deferred items agreed.	
Prepare test scripts	Ticket creation, email, workflow, SLA, time entry, invoice, portal, integration checks.	
Prepare training plan	Admin, service desk, finance, management, and end-user roles covered.	

10. What Visionary 360 Brings to the Table

A mature implementation partner does more than click settings. The value is in helping you make better decisions, avoid rework, and launch with confidence.

- Structured implementation sequencing so foundational objects are configured before dependent modules.
- Discovery prompts that expose billing, workflow, and data risks early.
- Configuration guidance based on how service desk, finance, sales, projects, and reporting connect.
- Testing discipline across email, tickets, SLAs, workflows, billing, integrations, and go-live readiness.
- Training and adoption support so the system is not only configured but actually used correctly.

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.