



HALO ITSM · MICROSOFT 365

Five native integrations. One licence. Everything connected.

Teams, Entra ID, Intune, Email, and CSP — built into Halo at no extra cost. This guide covers what each integration does, how to set it up, and what it looks like in practice.

IT Managers

Service Desk Leaders

Microsoft 365 Admins

MSPs

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HALO + MICROSOFT 365

Most Microsoft integrations cost extra. Halo includes five.

If your organisation runs Microsoft 365, Halo connects to it across every layer — identity, devices, communication, email, and licensing. Every integration is first-party, built and maintained by Halo's engineering team, and included in the standard monthly licence.

INTEGRATION	WHAT IT DOES	KEY CAPABILITY
 Microsoft Teams	Five integration layers: notifications, bot, self-service portal, click-to-call, and virtual agent.	Agents raise tickets from Teams chats. End users raise requests from a Teams tab. Channels receive live ticket updates.
 Microsoft Entra ID	SSO for agents and end users, MFA enforcement via conditional access, and automated user provisioning.	New starters appear in Halo automatically. Leavers lose access when their Entra account is disabled.
 Microsoft Intune	Continuous device sync from Intune into the Halo CMDB — Windows, macOS, iOS, and Android.	Device data appears on tickets automatically. Non-compliant devices trigger incidents before users call the helpdesk.
 Email (M365)	Native connection to Microsoft 365 shared mailboxes via Microsoft Graph with webhook delivery.	Tickets created in under 5 seconds. Full conversation threading. Shared mailboxes supported natively.
 Microsoft CSP	Connects to Microsoft Partner Center via GDAP. Syncs customers, users, and licence data into Halo Organisations.	MSPs see every customer's Microsoft subscription and seat counts inside Halo — no Partner Center tab-switching.

Every integration listed above ships with every Halo licence — HaloITSM and HaloPSA. There are no per-integration fees, no middleware requirements, and no add-on subscriptions. Allied ESM configures all five as part of your implementation.

5

M365 integrations included in every licence

£0

Additional cost for any of the five integrations

<5s

Ticket creation from incoming email via webhook

1

App Registration connects Halo to your Microsoft tenant

INTEGRATION LAYER 1 OF 5

Your team lives in Teams. Now your service desk does too.

Most ITSM platforms have a basic Teams notification. Halo has five distinct integration layers — each one designed to keep agents and end users working where they already are. All included in the standard licence, with no middleware required.

CHANNEL NOTIFICATIONS

Ticket updates delivered to Teams channels

Any event in Halo — new ticket, status change, priority escalation, SLA breach — pushes a rich message card to any Teams channel. Configure exactly which events fire a notification and route them to any channel or group chat.

TEAMS BOT

Raise and manage tickets from any Teams chat

The Halo bot is available from the Teams App Store. Agents and end users can raise a ticket directly from any message, search by ticket number, follow updates, and add notes — in both private and group chats. Connect your Halo account once; the bot works everywhere from that point forward.

SELF-SERVICE PORTAL

The full Halo portal, embedded as a Teams tab

Embed the Halo self-service portal as a tab inside Teams. End users raise requests, check ticket status, and browse the knowledge base without opening a browser. With Entra ID SSO, they log in automatically using their Microsoft 365 identity. MSPs can push the tab to individual customer tenants.

CLICK-TO-CALL

Initiate a Teams call from inside a Halo ticket

Agents call users via Teams directly from a Halo ticket — one click, no context switching. When a Teams call arrives, a pop-up surfaces the relevant ticket and caller record so agents have full context before they answer.

VIRTUAL AGENT

AI-powered support running inside Teams

Halo's virtual agent runs as a bot in Teams. End users describe their issue in plain language — the agent surfaces knowledge base articles, raises a ticket automatically if needed, or escalates to a live agent. Powered by Halo AI, included in every licence at no extra cost.

Setup: enable the integration in Halo (Configuration - Integrations - Microsoft Teams), register the Halo app in your Microsoft 365 tenant, add the bot from the Teams App Store, configure notification channels, then optionally embed the self-service portal as a tab. Allied ESM handles all of this as part of your implementation.

INTEGRATION LAYER 2 OF 5

One identity. Everything unlocked.

If your organisation runs Microsoft 365, you already have Entra ID. Halo's native integration uses it to handle identity, access, and provisioning — so your service desk works the same way as every other tool in your Microsoft estate.

SINGLE SIGN-ON

Sign in to Halo with your Microsoft identity

Agents and end users authenticate using their Microsoft 365 credentials — the same login as Teams, Outlook, and SharePoint. No separate Halo password. SSO applies to agent logins, the self-service portal, or both.

MFA ENFORCEMENT

Your MFA policy applies to Halo automatically

If you enforce MFA through Entra conditional access policies, those controls extend to Halo at no extra configuration cost. No separate MFA setup required inside Halo itself.

AUTOMATED PROVISIONING

Users stay in sync with your directory

Halo continuously syncs users and technicians from Entra ID via Task Scheduler. New starters appear in Halo automatically. Leavers lose access when their account is disabled. No manual user management, no access drift.

SELF-SERVICE PORTAL AUTH

End users access the portal with zero friction

The Halo self-service portal authenticates via Entra ID — end users open the portal already logged in. Works in-browser and when the portal is embedded inside Microsoft Teams.

Before you start — what your Azure team needs to do

These steps require your Azure team before Halo can connect. Allied ESM guides you through each one.

WHO	TASK	WHY IT MATTERS
Azure Admin	Create an App Registration in the Entra admin centre	Registers Halo as a trusted application in your tenant
Global Admin	Grant API permissions and admin consent	Cannot be delegated to a lower-privilege account
Azure Team	Generate a client secret and rotate it every 1-2 years	If the secret expires without rotation, SSO and user sync will halt
Azure Team	Review conditional access policies before enabling SSO	Existing policies apply to Halo once SSO is active

The Entra ID integration is included in every Halo licence — HaloITSM and HaloPSA. No middleware, no third-party connectors, no add-on fees. Can be added to an existing live Halo environment without disruption.

INTEGRATION LAYER 3 OF 5

Your device estate, live inside your service desk.

Halo's native Intune integration automatically syncs every managed device into your CMDB — Windows, macOS, iOS, and Android. Set up once via a single App Registration in your Microsoft tenant; syncs continuously from that point forward with no agents or middleware to install.

CONTINUOUS SYNC

No manual imports. No scheduled jobs to maintain.

Halo polls Intune on a schedule you define. Every managed device syncs automatically — your CMDB reflects the current state of your estate at all times.

DEVICE DATA ON TICKETS

Every device detail surfaced when a ticket is raised

When a user raises a ticket, their device details appear automatically — OS version, compliance status, serial number, and last Intune check-in. No asking users to find their own serial numbers.

COMPLIANCE AUTOMATION

Non-compliant devices trigger incidents automatically

When a device's compliance status changes in Intune, Halo's automation rules raise an incident immediately. Proactive security — your team is alerted before users start calling the helpdesk.

USER-TO-DEVICE LINKING

Complete picture of who owns what

Devices are automatically linked to their assigned users via Entra ID. Full asset lifecycle tracked alongside your service desk activity — no duplicate imports, no configuration overlap.

Setup — three steps, done once

1 Connect your tenant

Provide your Microsoft tenant details and App Registration credentials in Halo's integration settings. A single app registration — the same one used for Entra ID — connects Halo to both Intune and your user directory.

2 Initial device import

Halo pulls your full Intune device inventory into the CMDB. Every managed device — Windows, macOS, iOS, Android — becomes an asset record with full metadata: OS version, compliance status, serial number, and last check-in.

3 Continuous sync keeps it current

Halo polls Intune on a schedule you control. New devices, compliance changes, and ownership updates sync automatically — no ongoing maintenance, no manual exports, no stale CMDB records.

The Intune integration is included in every Halo licence. No additional licensing, no agents to install, no third-party middleware. Allied ESM configures this as part of your implementation.

INTEGRATION LAYER 4 OF 5

Email in. Tickets out. The moment it arrives.

Halo connects directly to your Microsoft 365 mailbox and turns every incoming email into a ticket — instantly, automatically, with zero manual work. Native integration via Microsoft Graph, included in every licence, supporting shared mailboxes like support@company.com out of the box.

Two processing methods — choose what works for your environment

RECOMMENDED

⚡ Webhooks (Instant Delivery)

Azure sends a notification to Halo the instant an email arrives. Tickets created in under 5 seconds. Uses application permissions with fewer Azure AD requirements. Azure subscription auto-renews before expiry — no manual token management.

ALTERNATIVE

✉ Mailbox Scan (Polling)

Halo polls the mailbox every 3-5 minutes. Straightforward to set up with delegated permissions. Best suited for lower-volume environments or where webhooks are not possible.

What's included beyond email-to-ticket

✉ Shared Mailbox Support

Connect team inboxes — support@, helpdesk@, facilities@ — not personal accounts. Halo handles shared mailboxes natively for both processing methods.

🔗 Email Threading

When a user replies to a ticket notification, Halo recognises the thread and updates the existing ticket. Full conversation history stays in one place.

📋 Inbound Logging

Every email is logged — when it arrived, how it was processed, whether it succeeded. Search the inbound log from within Halo at any time.

🔄 Auto Token Renewal

For webhook connections, Halo automatically renews the Azure subscription before it expires. No maintenance windows, no risk of the mailbox going silent.

🔔 Per-Agent Error Alerts

Configure which agents receive a notification if email processing fails. No silent errors — the right person knows the moment something goes wrong.

📅 Exchange Calendar Sync

Agents' Exchange calendars connect two-way to Halo. Appointments created in Halo appear in Exchange and vice versa — full team availability visible in one place.

Also supported: Google Workspace (Gmail API via OAuth 2.0), on-premises Exchange (EWS), and IMAP/POP3. Allied ESM handles the full email integration setup as part of every Halo implementation.

PURE-PLAY HALO PARTNER

Allied ESM is 100% focused on Halo.

We are one of a small number of pure-play Halo ITSM partners globally. Every consultant, every project, every support call is built exclusively around Halo — no competing platforms, no divided loyalties.

Allied ESM holds Cyber Essentials certification. Our Halo-certified delivery consultants configure all five Microsoft 365 integrations as part of every implementation — Teams, Entra ID, Intune, Email, and CSP.

WHAT ALLIED ESM DELIVERS

- Implementation — fixed-price plans from 5 weeks (Micro) to 17 weeks (Complex)
- Full Microsoft 365 integration setup — app registrations, SSO, bot, CMDB sync, email
- Change and adoption — making Halo stick across your organisation
- Managed services — ongoing expert support with a named dedicated team
- ITSM staffing — UK-based Halo-certified consultants for your team
- Virima + Halo — IT asset discovery and CMDB integration

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