

Connect Halo to Monjur

Put your Monjur contract terms on the quotes you send from Halo. When your client accepts the quote, they accept your terms in the same step. You set this up once, and it takes about 10 minutes.

Before you start

- A Halo login that can create roles and API applications (usually a Halo admin).
- Your Monjur Pilot login.
- Your Halo web address, for example **yourcompany.halopsa.com**.

PART 1 · IN HALO

Create a Monjur role and an API application, then copy two codes.

PART 2 · IN MONJUR

Paste the codes in, connect, and pick the quote template you send.

PART 3 · IN HALO

Set your new template as the default for quotes.

PART 1 · IN HALO

Give Monjur access to your quote templates

1 Create a role named Monjur

In Halo, go to **Configuration → Teams & Agents → Roles → New**.

Name the role **Monjur** and set these three things. Leave everything else as it is.

Quotations Access Level Read and Modify

Can Create PDF Templates Yes

Halo Administrator No

Click **Save**.

This role gives Monjur what it needs to copy your quote templates, without Halo admin rights.

Configuration > Teams & Agents > R...

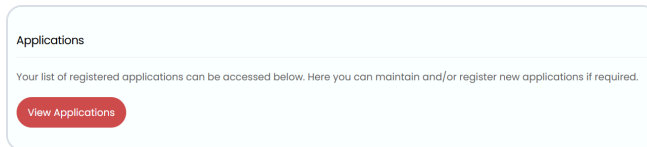
-  All Features
-  Organization
-  Teams & Agents
-  Teams
-  **Roles**
-  Agents
-  Workdays
-  Statuses
-  Holiday Management
-  Qualification Matching

Roles sits under Teams & Agents.

2

Create the API application

Go to **Configuration → Integrations → Halo API → View Applications → New** .



Click View Applications, then New.

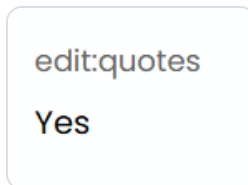
Name the application **Monjur** and set:

Authentication Method Client ID and Secret (Services)

Agent to log in as Application Identity

Role Monjur (the role from step 1)

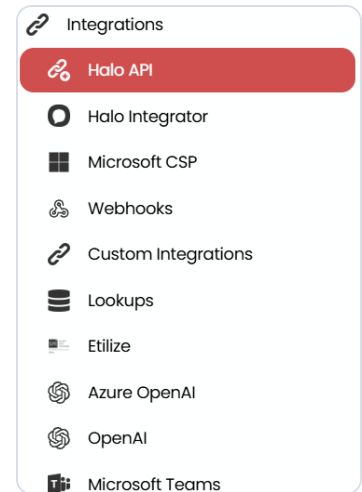
Permissions tab Quotations (edit:quotes)



Permissions tab: edit:quotes set to Yes.

Click **Save**. Then copy the **Client ID** and **Client Secret** and keep them handy for Part 2.

Copy the Client Secret right away and keep it somewhere safe. If you already have a Monjur application in Halo, you can reuse it.



Halo API sits under Integrations.

[←](#) [Edit](#) [Download Examples](#) [Remove this Application](#)

 **Monjur**

[Details](#) [Permissions](#) [Security](#)

Application Name

Monjur

Description

Not set

Creation Date

Created By

Active

Yes

Authentication Method

Client ID and Secret (Services)

For backend non user-facing applications only. This method allows logging in just with a Client ID a

Client ID

XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX

Client Secret

Login Type

Agent

Identity Roles

Monjur

Your finished API application in Halo should look like this.

Connect Halo and install your terms

3 Open the Halo integration

Sign in to Monjur Pilot. Open your **Profile**, select the **Integrations** tab, then choose **HaloPSA**.

4 Enter your Halo details and connect

1. **Halo tenant subdomain:** the first part of your Halo web address. If you sign in at `yourcompany.halopsa.com`, enter **yourcompany**. If you use your own domain for Halo, enter the full address.
2. **Client ID** and **Client Secret:** paste the two codes you copied in step 2.
3. Click **Connect Halo**.

HaloPSA

Connect Halo so Pilot can install Contract Acceptance and Exhibit A onto a copy of the quotation template you send. Your original template is not changed.

1 Connect Halo

First, get your credentials from Halo. It takes about 3 minutes and you only do it once.

A Create a role named Monjur

Configuration → Teams & Agents → Roles → New

Set three things. Leave the rest as they are:

Quotations Access Level	Read and Modify
Can Create PDF Templates	Yes
Halo Administrator	No

B Create the API application

Configuration → Integrations → HaloPSA API → View Applications → New

Authentication	Client ID and Secret (Services)
Agent to Login	Application Identity
Role	Monjur
Permissions	Quotations (edit:quotes)

Save, then copy the Client ID and Client Secret. If a Monjur application already exists, reuse it.

Halo tenant subdomain

yourcompany

`https://{tenant}.halopsa.com`

Client ID

Paste your Client ID

Client Secret

.....

Connect Halo

Pilot verifies the credentials, then lists your quotation templates.

The setup steps from Part 1 are also shown on this screen.

5

Pick the quote template you send

Once Halo shows as **Connected**, you'll see a list of your quotation templates. Select the one you use for client quotes, then click **Clone and install**.

HaloPSA

Connect Halo so Pilot can install Contract Acceptance and Exhibit A onto a copy of the quotation template you send. Your original template is not changed.



Connect Halo

yourcompany.halopsa.com

Last verified 10/12/2026, 1:45:28 PM · Agent login, edit:quotes

2 Install onto a quotation template

Pick the template you actually send. Your live template is never overwritten.

☒ Formal Proposal

☐ Formal Proposal - Basic

☐ Proposal - PDF Format

☐ Proposal (Alternate Style)

☐ Quick Quote

Clone and install

6

Review and confirm

Monjur shows what it will add to a copy of your template:

- An **Acceptance and Incorporation by Reference** section above the quote signature
- An **Exhibit A** page that links to your live Monjur terms

Halo's standard Terms & Conditions pages are left off the copy, since your Monjur terms replace them. Your original template is not changed. Click **Clone and install** to finish.

HaloPSA

Connect Halo so Pilot can install Contract Acceptance and Exhibit A onto a copy of the quotation template you send. Your original template is not changed.



Connect Halo

yourcompany.halopsa.com

Last verified 10/12/2026, 1:45:28 PM · Agent login, edit:quotes

2 Install onto a quotation template

Formal Proposal → **Formal Proposal — Monjur**

- Acceptance and Incorporation by Reference above \$QUOTESIGNATURE / \$AGENTQUOTESIGNATURE.
- Exhibit A on its own following page, linked to your live terms.
- Stock HaloPSA Terms & Conditions pages dropped.
- Formal Proposal is not changed.

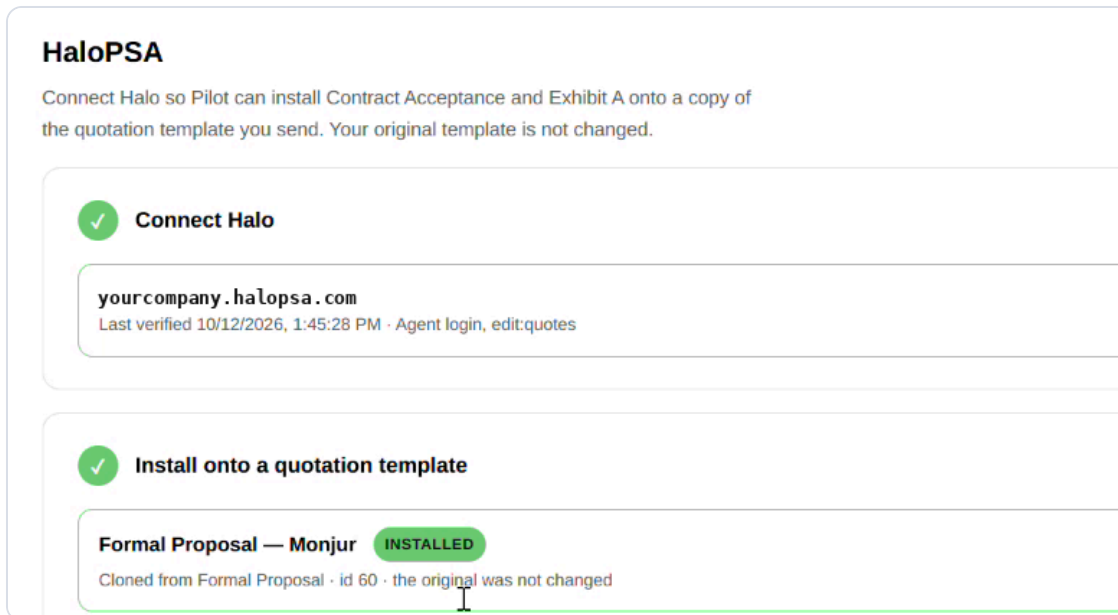
Clone and install

Cancel

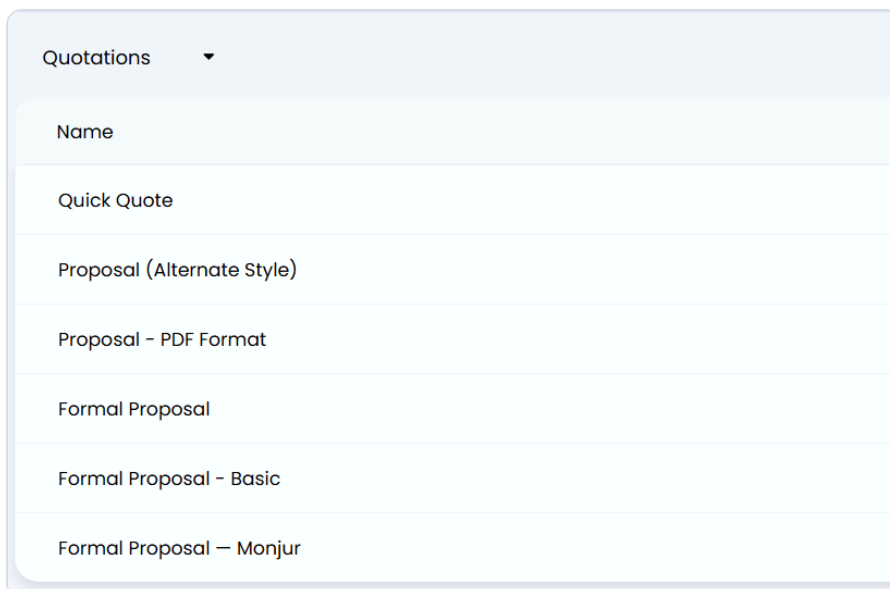
Make your new template the default

7 Switch your quotes to the new template

When the install finishes, you'll see **Installed** in Monjur. Your new template has the same name as the original with **Monjur** added to the end.



Monjur will remind you of one last step. Until you switch to the new template, your quotes still go out on the original one. In Halo, go to **Configuration → Quotations → General Settings** and set **Default PDF Template for Quotations** to your new Monjur template. Save.



The new template appears in Halo next to your original (Configuration → Reporting → PDF Templates).

8

Check a quote

Open or preview any quote. Above the signature you'll see the acceptance section, and the next page lists your contract documents as links under Exhibit A.

Acceptance and Incorporation by Reference

This Order together with the Master Services Agreement and Service Attachments and other terms and conditions identified on Exhibit A, all of which are incorporated herein by reference (collectively, the "Agreement") is between Example Provider, LLC (sometimes referred to as "we," "us," "our," or "Provider"), and the customer identified on the Order (sometimes referred to as "you," "your," or "Client"). This Agreement is effective as of the date the Client accepts the Order (the "Effective Date").

By signing or accepting this Order, Client acknowledges, represents, and warrants that it has read and agrees to the terms and conditions identified on Exhibit A to this Order which are incorporated as if fully set forth herein.

The parties hereby agree that electronic signatures to this Order shall be relied upon and will bind them to the obligations stated herein. Each party hereby warrants and represents that it has the express authority to execute this Agreement(s).

Provider may make changes to the Agreement at any time. If there are changes, Provider will revise the date at the top of the document. Provider may or may not provide Client with additional notice regarding such changes. Client should review the terms and conditions regularly. Unless otherwise noted, the amended terms and conditions will be effective immediately, and your continued use of the Services thereafter constitutes your acceptance of the changes. If you do not agree to the amended terms and conditions, you must stop using the Services immediately. Please note, you may incur a termination fee or other third-party fees, if applicable.

Your signer
Director

4/28/2026

Client signer

Acceptance section above the quote signature.

Exhibit A

[Master Services Agreement](#)

[Service Attachment for Managed Services](#)

[Schedule of Services](#)

[Data Processing Agreement](#)

[Service Level Objectives](#)

[Schedule of Third-Party Services](#)

Exhibit A with links to your live terms.

You're set up

From here, every quote sent on that template includes your Monjur terms, and clients accept them when they accept the quote.

Good to know: To add your terms to another template, click **Install onto another template** in Monjur. Installing onto the same template again updates your existing copy instead of making a new one. You can disconnect Halo from Monjur at any time.

Questions? Email inquiries@monjur.com.