



Primary Sense HaloConnect Transition Basic Troubleshooting Steps

July 2026

V2.0

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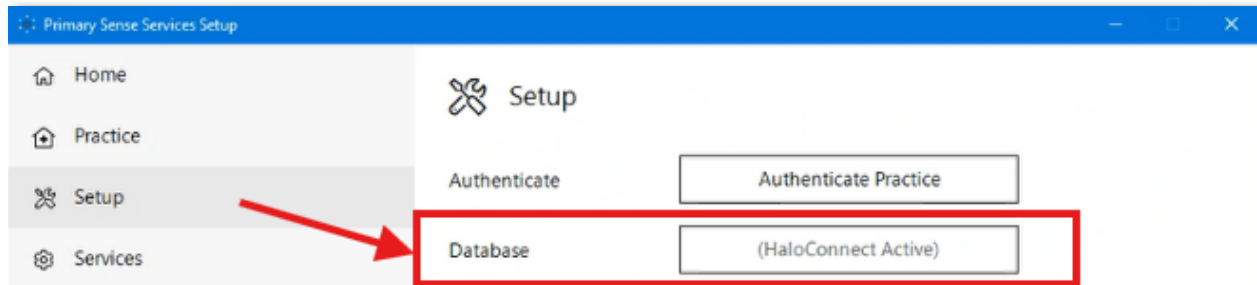
Revision History / Change

Version	Date	Author	Description of Changes
1.0	28 July 2026	J.Fernandez	Document creation
2.0	03 August 2026	J.Fernandez	Formatting changes and updating of Table of Contents

Overview:

Primary Sense has now transitioned to HaloConnect for Best Practice, replacing the existing direct database connection method.

To verify that the practice's Primary Sense Extractor has successfully transitioned to HaloConnect, kindly ensure that the button displayed next to Database shows **(HaloConnect Active)** and is **no longer clickable**.

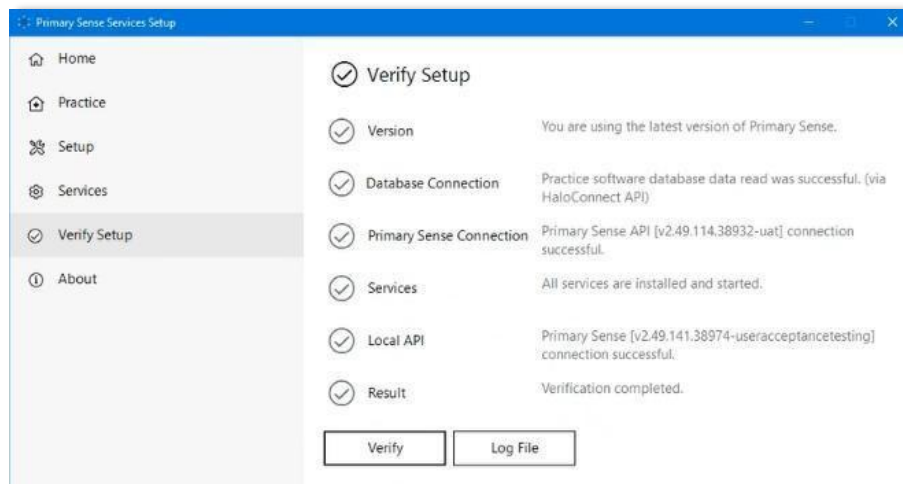


Common Issues That May Arise from HaloConnect Transition and Some Basic Troubleshooting Steps:

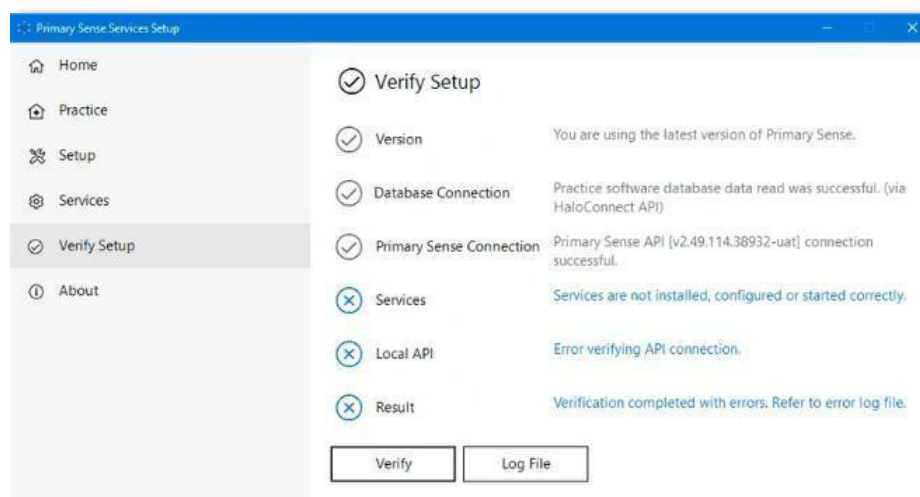
Issue Description: Primary Sense Extractor has gone offline / Desktop(s) unable to connect

Action Steps:

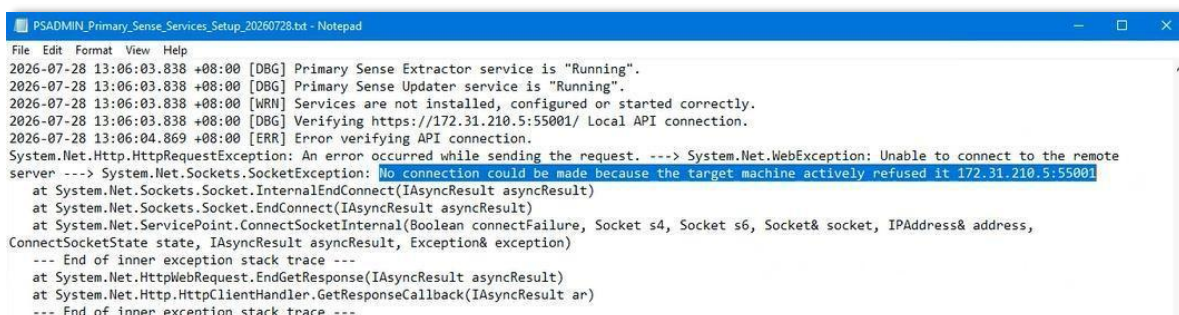
1. Log into the server where the PS Extractor is hosted or installed
2. Launch the Primary Sense Services Setup via the Start Menu
3. Click the Verify Setup from the left panel
4. Click the [Verify] button
5. Check the results. Fully working PS Services will show all ticks.



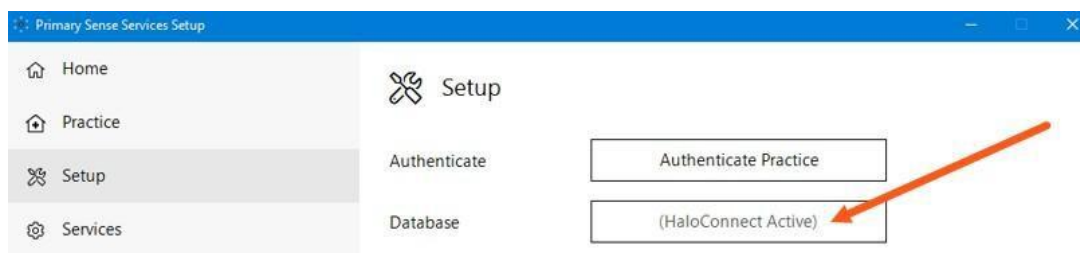
Otherwise, it will provide you with a description of which verification step it failed



- If there are errors, click the **[Log File]** button to view the logs. We are expecting to see a similar error(s) as shown in the example below.



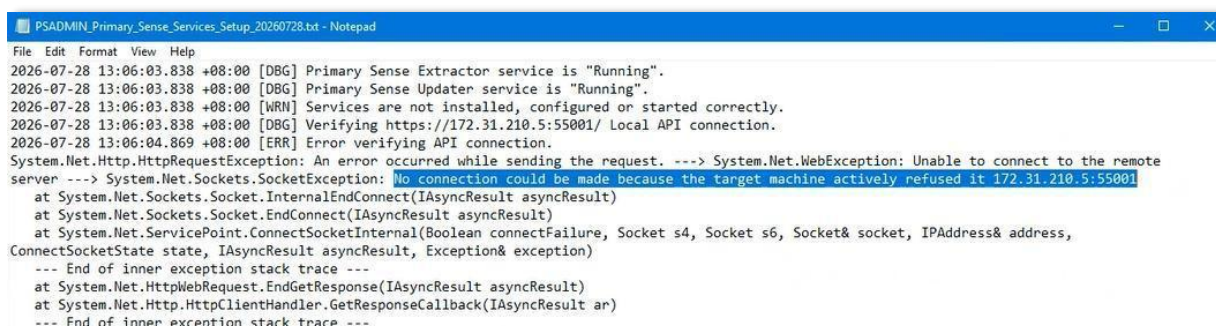
Issue Description: Primary Sense Extractor is not showing Database as (HaloConnect Active)



Action Steps:

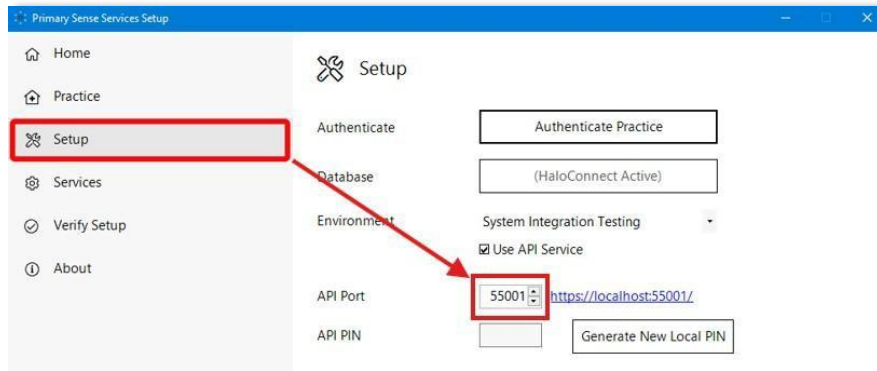
1. Log into the Best Practice software
2. Navigate to Setup > Configuration > Database > click [Search for third-party integration]
3. Search for Primary Sense (via Halo Connect)
4. Ensure that Primary Sense (via Halo Connect) is enabled or "ticked"
5. Also, follow the User Guide for pairing with HaloConnect

Issue Description: Error from the logs file 'Unable to connect to the remote server'



Action Steps:

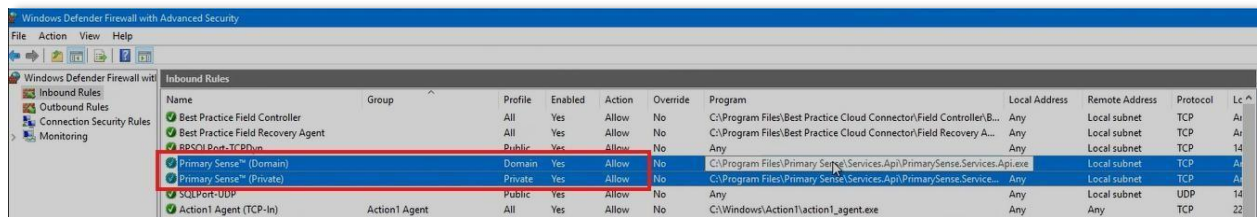
1. Verify that TCP port 55001 is available and not currently in use by another application, process, or service to prevent communication and port-binding conflicts.
2. If TCP port 55001 is already bound to another application or service, allocate an available, unassigned port for Primary Sense and update the port configuration accordingly within the Setup window and click Save.



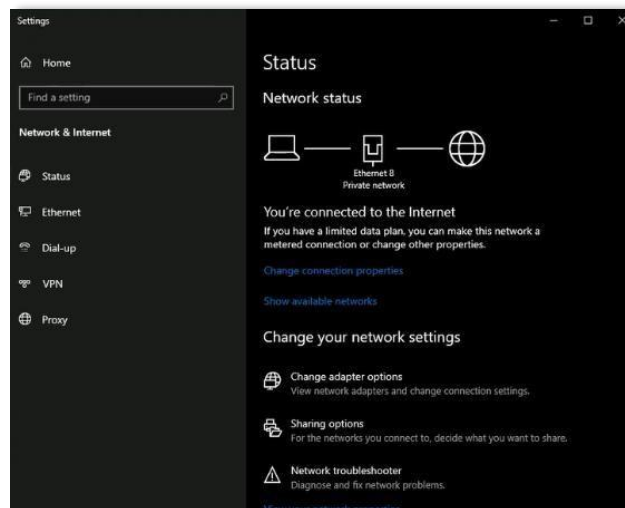
Issue Description: Resolving other API connection issues

Action Steps:

1. Launch Windows Defender Firewall settings
2. Ensure that Primary Sense™ is allowed on both Inbound Rules as shown below



3. If using a third-party firewall software, ensure to set it up equivalent rules as shown above, or allow incoming TCP port 55001 from the local network.
4. Also ensure that Network Connection is set to Private or Domain profile, as the public network profile may restrict inbound and outbound communications required by Primary Sense.



Issue Description: Primary Sense Desktop App shows an orange or grey colored tile (see below)

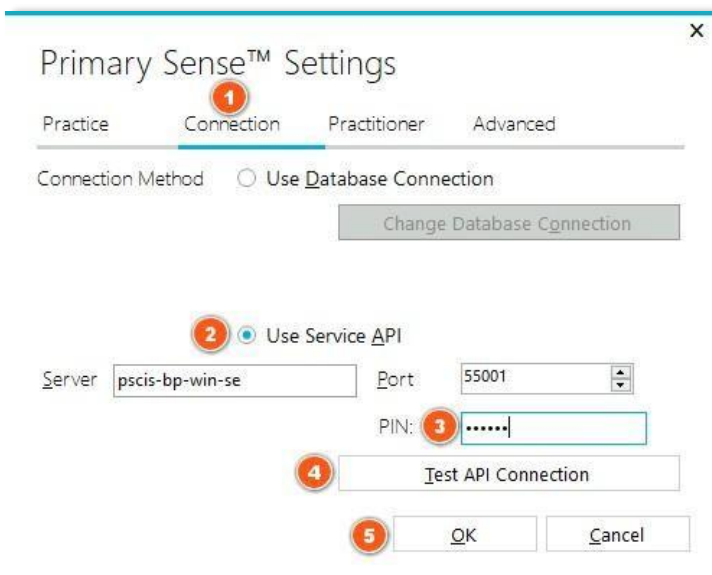


Action Steps:

1. An orange-colored tile indicates that the PS Desktop app or Extractor is not online. A grey-colored tile indicates the Desktop failed to establish communication with the Primary Sense Local API Service.
2. Click the PS Desktop app to expand the displayed tiles then click Settings



3. The Primary Sense Settings window will display on your screen.
 - 3.1 Click the Connection tab
 - 3.2 Tick the option for 'Use Service API'
 - 3.3 Enter the PIN (this can be derived from the Primary Sense Services Setup in the server)
 - 3.4 Click [Test API Connection]
 - 3.5 Once connection succeeds, click [OK]



Issue Description: Any other issues that cannot be resolved

Action Steps:

1. Book an IT support session with the Primary Sense technical team [here](#).