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About this document

This document is intended for partner administrators who want to use Cyber Protect Cloud to provide services to their clients.

This document describes how to set up and manage the services available in Cyber Protect Cloud by using the management portal.
About Cyber Protect

Cyber Protect is a cloud platform that enables service providers, resellers, and distributors to deliver data protection services to their partners and customers.

The services are provided at the partner level, down to the customer company level and the end-user level.

The services management is available through web applications called the service consoles. The tenant and user account management is available through a web application called the management portal.

The management portal enables administrators to:
- Monitor the usage of services and access the service consoles
- Manage tenants
- Manage user accounts
- Configure services and quotas for tenants
- Manage storage
- Manage branding
- Generate reports about the service usage

Cyber Protect services

This section describes feature sets introduced in March 2021 with the new billing model. Read more about the advantages of the new billing model in the Cyber Protect data sheet.

The following services and feature sets are available in Cyber Protect Cloud:

- **Cyber Protect**
  - Protection - complete cyber protection with security and management functionality included in the base product, and disaster recovery, back up and recovery, automation, and email security available as pay as you go features. This functionality can be extended with advanced protection packs that are subject to additional charges.
  - Advanced protection packs are sets of unique features that address more sophisticated scenarios in a specific functional area, for example, Advanced Backup, Advanced Security, and others. Advanced packs extend the functionality available in the standard Cyber Protect service.
    - For more information on Advanced Protection packs, see "Advanced Protection packs" (p. 144).
  - File Sync & Share - a solution for secure sharing of corporate content from anywhere, at any time, and on any device.
  - Physical Data Shipping - a solution that helps you save time and network traffic by sending the data to the cloud data center on a hard drive.
  - Notary - a blockchain-based solution that ensures the authenticity of shared content.

- **Cyber Infrastructure SPLA**
In the management portal, you can select which services and feature sets will be available to your tenants. The configuration is done per tenant, when you provision or edit a tenant, as described in Creating a tenant.

**Billing modes for Cyber Protect**

A billing mode is a scheme for accounting and billing for the use of services and their features. The billing mode determines what units will be used as the base for pricing calculations. Billing modes can be set by partners at the Customer level.

The licensing engine automatically acquires the offering items depending on what features are requested in protection plans. Users can optimize the level of protection and cost by customizing their protection plans.

**Note**

You can use only one billing mode per Customer tenant.

**Billing modes for the Protection component**

The Protection has two billing modes:

- Per workload
- Per gigabyte

The feature set of both billing modes is identical.

In both billing modes, the Protection service includes standard protection features that covers the majority of cyber security risks. Users can use them at no additional charge. The use of included features will be accounted, but not billed for. For a complete list of included and billable offering items, see "Cyber Protect services" (p. 7).

Though an advanced pack is enabled for a customer, billing will start only after the customer starts using the features of that pack in a protection plan. When an advanced feature is applied in a protection plan, the licensing engine automatically assigns the required license to the protected workload.

When the advanced feature is no longer used, the license is revoked and the billing stops. The licensing engine assigns automatically the license that reflects the actual usage of the features.

You can assign licenses only for the standard Cyber Protect service features. Advanced features are billed based on the usage and their licenses cannot be modified manually. The licensing engine assigns and unassigns these licensed automatically. You can change the license type for a workload manually, but it will be reassigned when the protection plan for that workload is modified by a user.
Note
The billing for the advanced protection features does not start when you enable them. Billing starts only after a customer starts using the advanced features in a protection plan. Enabled feature sets will be accounted and included in usage reports, but will not be billed for, unless their features are used.

Billing modes for File Sync & Share
File Sync & Share has the following billing modes:

- Per user
- Per gigabyte

You can also apply the billing rules of the legacy File Sync & Share edition.

Note
The billing for Advanced File Sync & Share does not start when you enable it. Billing starts only after a customer starts using its advanced features. The enabled advanced feature set will be accounted for and included in usage reports, but will not be billed for, unless its features are used.

Billing for Physical Data Shipping
The billing for Physical Data Shipping follows the pay-as-you-go model.

Billing for Notary
The billing for Notary follows the pay-as-you-go model.

Using the billing modes with legacy editions
If you still have not migrated to the current billing model, use the offering items under one of the billing modes to replace the legacy editions. The licensing engine will automatically optimize the licenses that are assigned to the customer to minimize the billable amount.

Note
You cannot mix editions with billing modes.

Switching from legacy editions to the current licensing model
You can manually switch the offering items for your tenants by editing their profile and selecting offering items for them. For more information about the switching process, see "Switching between editions and billing modes" (p. 10).

To switch from editions to billing modes for multiple customers, see Mass edition switch for multiple customers (67942).
Switching between editions and billing modes

In the management portal, you can modify a tenant account to switch offering items between billing modes (per workload to per gigabyte and vice versa) and between legacy editions and billing modes.

For information about mass switching of tenants, see Mass edition switch for multiple customers (67942).

The switching process includes the following steps.

1. Provision the new offering items to a customer tenant (enabling of offering items and quota setup) to match the functionality that was available in the original offering item.
2. Unassign unused offering items and assign the offering items to workloads according to the features used in the protection plans (usage reconciliation).

The following table illustrates the process in both directions.

<table>
<thead>
<tr>
<th>Switch direction</th>
<th>Edition &gt; Billing modes</th>
<th>Billing mode &gt; Billing mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offering items switch</td>
<td>Enable offering items to fulfill the functionality that was available in the source edition.</td>
<td>The identical set of the offering items will be enabled.</td>
</tr>
<tr>
<td>Quota switch</td>
<td>Quota will be replicated from the source offering item to destination offering items. Source Standard → destination Standard product. Source Standard → destination packs.</td>
<td>Quotas will be replicated from the source offering item to the destination offering item.</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>If you are switching from an edition with sub-editions (for example, &quot;Cyber Protect (per workload)&quot;), the quotas will be summarized.</td>
<td></td>
</tr>
<tr>
<td>Usage switch</td>
<td>Offering items will be reassigned to the workloads according to the features requested in the protection plans assigned on these workloads.</td>
<td></td>
</tr>
</tbody>
</table>

Example: Switching Cyber Protect Advanced edition to Per workload billing

In this scenario, a customer tenant has Cyber Protect Advanced edition used on 8 workstations, and the quota is set to 10 workloads. 3 of the workstations are using software inventory and patch management in their protection plans, 2 of the workstations have URL filtering enabled in their protection plans, and one of the machines is using continuous data protection. The following table illustrates the conversion of the edition to new offering items.

<table>
<thead>
<tr>
<th>Source offering items - usage/quota</th>
<th>Destination offering items - usage/quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyber Protect Advanced workstation 8/10</td>
<td>• Workstation - 8/10</td>
</tr>
</tbody>
</table>
The following steps were executed during the switch:

1. The offering items that cover the functionality that was available in the source edition were enabled automatically.
2. The quota was replicated on the new offering items.
3. The usage was reconciled according to the actual usage in protection plans: three workloads use features of the Advanced Management pack, two use features from the Advanced Security pack, and one uses features of the Advanced Backup pack.

Example: Cyber Protect per workload edition to Per workload billing

In this example, the customer has multiple editions assigned on workloads. Each workload can have only one edition or one billing mode assigned.

<table>
<thead>
<tr>
<th>Source offering items - usage/quota</th>
<th>Destination offering items - usage/quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyber Protect Essentials Workstation - 6/12</td>
<td>Workstation - 14/42</td>
</tr>
<tr>
<td>Cyber Protect Standard Workstation - 5/10</td>
<td>Advanced Backup workstation - 2/42</td>
</tr>
<tr>
<td>Cyber Protect Advanced Workstation - 2/10</td>
<td>Advanced Security - 13/42</td>
</tr>
<tr>
<td>Cyber Backup Standard Workstation - 1/10</td>
<td>Advanced Management - 5/42</td>
</tr>
</tbody>
</table>

The following steps were executed during the switch:

1. The offering items that cover the functionality that was available in all source editions were enabled automatically. With billing modes, multiple offering items can be assigned to a workload as needed.
2. The quotas were summarized and replicated.
3. The usage was reconciled according to the protection plans.

Changing the billing mode for a partner tenant

To change the billing mode for a partner tenant

1. In the management portal, go to Clients.
2. Select the partner tenant whose billing mode you want to change, click the ellipsis icon, and then click Configure.
3. On the Cyber Protect tab, select the service for which you want to change the billing mode and click Edit.
4. Select the desired billing mode and enable or disable the available offering items as needed.
5. Click **Save**.

**Changing the billing mode for a customer tenant**

You can change the billing for a customer tenant by:

- Editing the original billing mode, by enabling or disabling offering items.
- Switching to a completely new billing mode.

For more information about how to edit the available offering items, refer to Enabling or disabling offering items.

**To switch the billing mode for a customer tenant**

1. In the management portal, go to **Clients**.
2. Select the customer tenant whose edition you want to change, click the ellipsis icon ..., and then click **Configure**.
3. On the **Configure** tab, under **Service**, select the new billing mode. A dialog pops up to inform you about the consequences of the change to the new billing mode.
4. Enter your user name to confirm your choice.

**Note**

This change may take up to 10 minutes to complete.

**Offering items and quota management**

This section describes the following:

- What are services and offering items?
- How are offering items enabled or disabled?
- What are billing modes?
- What are Advanced protection packs?
- What are legacy editions and sub-editions?
- What are the soft and hard quotas?
- When can the hard quota be exceeded?
- What is backup quota transformation?
- How does the offering item availability affect the workload type availability in the Cyber Protect console?
Services and offering items

Services

A cloud service is a set of functionality that is hosted by a partner, or at end customer's private cloud. Usually, services are sold as a subscription or on a pay-as-you-go basis.

The Cyber Protect service integrates cyber security, data protection, and management to protect your endpoints, systems, and data from cyber security threats. The Cyber Protect service consists of several components: Protection, File Sync & Share, Notary, and Physical Data Shipping. Some of them can be extended with advanced functionality by using Advanced protection packs. For detailed information about included and advanced features, see "Cyber Protect services" (p. 7).

Offering items

An offering item is a set of service features that are grouped by specific workload type or functionality, for example, storage, disaster recovery infrastructure, and others. By enabling specific offering items, you determine what workloads can be protected, how many workloads can be protected (by setting quotas), and the level of the protection that will be available to your partners, customers, and their end users (by enabling or disabling advanced protection packs).

The functionality that is not enabled will be hidden from customers and users, unless you configure an upsell scenario. For more information on upsell scenarios, see "Configuring upsell scenarios for your customers" (p. 74).

The feature usage is gathered from the services and reflected on the offering items, which is used in the reports and further billing.

Billing modes and editions

With legacy editions, you can enable one offering item per workload. With billing modes, the functionality is split, so you can enable multiple offering items (service features and advanced packs) per workload to better suit the needs of your customers and apply more precise billing, only for the features that your customers actually use.

For more information about the billing modes for Cyber Protect, see "Billing modes for Cyber Protect" (p. 8).

You can use billing modes or editions to configure the services available to your tenants. You can select one billing mode or one edition per Customer tenant. As a result, to apply different billing modes for different service features, you need to create multiple tenants for a customer. For example, if the customer wants to have Microsoft 365 mailboxes in Per gigabyte billing mode, and Teams in Per workload billing mode, you must create two different customer tenants for this customer.

To limit the use of services in an offering item, you can define quotas for that offering item. See "Soft and hard quotas" (p. 15).
Enabling or disabling offering items

You can enable all offering items available for a given edition or a billing mode, as described in Creating a tenant.

**Note**
Disabling all offering items of a service does not disable the service automatically.

There are some limitations to disabling offering items, listed in the table below.

<table>
<thead>
<tr>
<th>Offering item</th>
<th>Disabling</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup storage</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>The cloud storage will become unavailable as a destination for backups within a customer tenant.</td>
</tr>
<tr>
<td>Local backup</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>The local storage will become unavailable as a destination for backups within a customer tenant.</td>
</tr>
<tr>
<td>Data sources (including Microsoft 365 and Google Workspace)*</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>The protection of the disabled data sources (including Microsoft 365 and Google Workspace) will become unavailable within a customer tenant, as follows:</td>
</tr>
<tr>
<td>All Disaster Recovery offering items</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>See the details in &quot;Soft and hard quotas&quot;.</td>
</tr>
<tr>
<td>All Notary offering items</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>The Notary service will be unavailable within a customer tenant.</td>
</tr>
<tr>
<td>All File Sync &amp; Share offering items</td>
<td>Offering items cannot be enabled or disabled separately.</td>
<td>The File Sync &amp; Share service will be unavailable within a customer tenant.</td>
</tr>
<tr>
<td>All Physical Data Shipping offering items</td>
<td>Can be disabled when the usage is equal to zero.</td>
<td>The Physical Data Shipping service will be unavailable within a customer tenant.</td>
</tr>
</tbody>
</table>

For an offering item that cannot be disabled when its usage is more than zero, you can manually remove usage, and then disable the corresponding offering item.

* The offering items relate to the workloads that you can add in the Cyber Protect console. For more information, refer to "Workload dependency on offering items" (p. 24). The table below summarizes which workload types will not be available if an offering item, a combination of offering items, or an advanced pack is not enabled in the Management portal.
<table>
<thead>
<tr>
<th>If you disable these offering items or advanced packs</th>
<th>You will not be able to add these types of workloads</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following combination:</td>
<td>Microsoft 365 Business</td>
</tr>
<tr>
<td>• Microsoft 365 seats</td>
<td></td>
</tr>
<tr>
<td>• Microsoft 365 SharePoint online</td>
<td></td>
</tr>
<tr>
<td>• Microsoft 365 Teams</td>
<td></td>
</tr>
<tr>
<td>The following combination:</td>
<td>Google Workspace</td>
</tr>
<tr>
<td>• Google Workspace</td>
<td></td>
</tr>
<tr>
<td>• Google Workspace Shared Drive</td>
<td></td>
</tr>
<tr>
<td>The following combination:</td>
<td>• Microsoft SQL Server</td>
</tr>
<tr>
<td>• Servers</td>
<td>• Microsoft Exchange Server</td>
</tr>
<tr>
<td>• Virtual machines</td>
<td>• Microsoft Active Directory</td>
</tr>
<tr>
<td>The following offering item:</td>
<td>Synology</td>
</tr>
<tr>
<td>• NAS</td>
<td></td>
</tr>
<tr>
<td>The following offering item:</td>
<td>• iOS devices</td>
</tr>
<tr>
<td>• Mobile</td>
<td>• Android devices</td>
</tr>
<tr>
<td>The following advanced pack:</td>
<td>Oracle Database</td>
</tr>
<tr>
<td>• Advanced Backup</td>
<td></td>
</tr>
</tbody>
</table>

**Soft and hard quotas**

*Quotas* enable you to limit a tenant's ability to use the service. To set the quotas, select the client on the **Clients** tab, select the service tab, and then click **Edit**.

When a quota is exceeded, a notification is sent to the user's email address. If you do not set a quota overage, the quota is considered "soft." This means that restrictions on using the Cyber Protection service are not applied.

When you specify the quota overage, then the quota is considered "hard." An **overage** allows the user to exceed the quota by the specified value. When the overage is exceeded, restrictions on using the service are applied.

**Example**

**Soft quota**: You have set the quota for workstations equal to 20. When the number of the customer's protected workstations reaches 20, the customer will get a notification by email, but the Cyber Protection service will be still available.

**Hard quota**: If you have set the quota for workstations equal to 20 and the overage is 5, then your customer will get the notification by email when the number of protected workstations reaches 20, and the Cyber Protection service will be disabled when the number reaches 25.
When a hard quota is reached, service gets limited (It is not possible to protect another workload or use more storage). When the hard quota is exceeded, a notification is sent to the user's email address.

**Levels on which quotas can be defined**

The quotas can be set on the levels listed in the table below.

<table>
<thead>
<tr>
<th>Tenant/User</th>
<th>Soft quota (only quota)</th>
<th>Hard quota (quota and overage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Folder</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Customer</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Unit</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td>User</td>
<td>yes</td>
<td>yes</td>
</tr>
</tbody>
</table>

The soft quotas can be set on the partner and folder levels. On the unit level no quotas can be set. The hard quotas can be set on the customer and user levels.

The total amount of hard quotas that are set on the user level cannot exceed the related customer hard quota.

**Setting up soft and hard quotas**

*To set up quotas for your clients*

1. In the management portal, go to Clients.
2. Select the client for which you want to setup quotas.
3. Select the Protection tab, and then click Edit.
4. Select the type of quota that you want to set. For example, select Workstations or Servers.
5. Click the Unlimited link on the right to open the Quota edit window.
   - If you want to inform the client about the quota and do not want to limit the client’s ability to use the service, set the quota value in the **Soft quota** field.
     The client will receive an email notification upon reaching the quota, but the Cyber Protection service will be still available.
   - If you want to limit the client’s ability to use the service, select **Hard quota** and set the quota value in the field below **Hard quota**.
     The client will receive an email notification upon reaching the quota, and the Cyber Protection service will be disabled.
6. In the Quota edit window, click Done, and then click Save.
Backup quotas
You can specify the cloud storage quota, the quota for local backup, and the maximum number of machines/devices/websites a user is allowed to protect. The following quotas are available.

Quotas for devices
- **Workstations**
- **Servers**
- **Virtual machines**
- **Mobile devices**
- **Web hosting servers** (Linux-based physical or virtual servers running Plesk, cPanel, DirectAdmin, VirtualMin, or ISPManager control panels)
- **Websites**

A machine/device/website is considered protected as long as at least one protection plan is applied to it. A mobile device becomes protected after the first backup.

When the overage for a number of devices is exceeded, the user cannot apply a protection plan to more devices.

Quotas for cloud data sources
- **Microsoft 365 seats**
  This quota is applied by the service provider to the entire company. Company administrators can view the quota and the usage in the management portal.
  Licensing of the Microsoft 365 seats depends on the selected billing mode for Cyber Protection.

**Important**
The local agent and the cloud agent consume separate quotas. If you back up the same workloads by using the both agents, you will be charged twice. For example:
- If you back up the mailboxes of 120 users by using the local agent, and you back up the OneDrive files of the same users by using the cloud agent, you will be charged for 240 Microsoft 365 seats.
- If you back up the mailboxes of 120 users by using the local agent, and you back up the same mailboxes also by using the cloud agent, you will be charged for 240 Microsoft 365 seats.

In the **Per workload** billing mode, the **Microsoft 365 seats** quota is counted per unique users. A unique user is a user who has at least one of the following:
- Protected mailbox
- Protected OneDrive
- Access to at least one protected company-level resource: Microsoft 365 SharePoint Online site, or Microsoft 365 Teams.

To learn how to check the number of members of a Microsoft 365 SharePoint or Teams site, refer to this knowledge base article.
Note
Blocked Microsoft 365 users that do not have a protected personal mailbox or OneDrive, and can only access shared resources (shared mailboxes, SharePoint sites, and Microsoft Teams), are not charged.
Blocked users are those who do not have a valid login and cannot access the Microsoft 365 services. To learn how to block all unlicensed users in a Microsoft 365 organization, refer to "Preventing unlicensed Microsoft 365 users from signing in" (p. 20).

The following Microsoft 365 seats are not charged and do not require a per-seat license:
- Shared mailboxes
- Rooms and equipment
- External users with access to backed up SharePoint sites and/or Microsoft Teams

For more information about the licensing options with the per gigabyte billing mode, refer to Cyber Protect Cloud: Microsoft 365 per GB licensing.
For more information about the licensing options with the per workload billing mode, refer to Cyber Protect Cloud: Microsoft 365 licensing and pricing changes.

- **Microsoft 365 Teams**
  This quota is applied by the service provider to the entire company. This quota enables or disables the ability to protect Microsoft 365 Teams and sets the maximum number of teams that can be protected. For protection of one team, regardless of the number of its members or channels, one quota is required. Company administrators can view the quota and the usage in the management portal.

- **Microsoft 365 SharePoint Online**
  This quota is applied by the service provider to the entire company. This quota enables or disables the ability to protect SharePoint Online sites and sets the maximum number of site collections and group sites that can be protected. Company administrators can view the quota in the management portal. They can also view the quota, together with the amount of storage occupied by the SharePoint Online backups, in the usage reports.

- **Google Workspace seats**
  This quota is applied by the service provider to the entire company. The company can be allowed to protect Gmail mailboxes (including calendar and contacts), Google Drive files, or both. Company administrators can view the quota and the usage in the management portal.

- **Google Workspace Shared drive**
  This quota is applied by the service provider to the entire company. This quota enables or disables the ability to protect Google Workspace Shared drives. If the quota is enabled, any number of Shared drives can be protected. Company administrators cannot view the quota in the management portal, but can view the amount of storage occupied by Shared drive backups in the usage reports.
  Backing up Google Workspace Shared drives is only available to customers who have at least one Google Workspace seats quota in addition. This quota is only verified and will not be taken up.
A Microsoft 365 seat is considered protected as long as at least one protection plan is applied to the user’s mailbox or OneDrive. A Google Workspace seat is considered protected as long as at least one protection plan is applied to the user’s mailbox or Google Drive.

When the overage for a number of seats is exceeded, a company administrator cannot apply a protection plan to more seats.

**Quotas for storage**

- **Local backup**

  The **Local backup** quota limits the total size of local backups that are created by using the cloud infrastructure. An overage cannot be set for this quota.

- **Cloud resources**

  The **Cloud resources** quota combines the quota for backup storage and quotas for disaster recovery. The backup storage quota limits the total size of backups located in the cloud storage. When the backup storage quota overage is exceeded, backups fail.

**Exceeding the quota for backup storage**

The backup storage quota cannot be exceeded. The protection agent certificate has technical quota that equals the tenant’s backup quota + overage. A backup cannot start if the quota is exceeded. If the quota in the certificate is reached during backup creation but the overage is not reached, the backup will complete successfully. If the overage is reached during backup creation, the backup will fail.

**Example:**

A user tenant has 1 TB of free space of their quota, and the overage configured for this user is 5 TB. The user starts a backup. If the size of the created backup is, for example, 3 TB, the backup will complete successfully because the overage is not exceeded. If the size of the created backup is larger than 6 TB, the backup will fail when the overage is exceeded.

**Backup quota transformation**

In general, this is how acquiring a backup quota and offering item mapping to resource type works: the system compares the available offering items with the resource type, and then acquires the quota for the matched offering item.

There is also a capability to assign another offering item quota, even if it does not exactly match the resource type. This is called the **backup quota transformation**. If there is no matching offering item, the system tries to find a more expensive appropriate quota for the resource type (automatic backup quota transformation). If nothing appropriate is found, then you can manually assign the service quota to the resource type in the Cyber Protect console.

**Example**

You want to back up a virtual machine (workstation, agent-based).
First, the system will check if there is an allocated **Virtual machines** quota. If it is not found, then the system automatically tries to acquire the **Workstations** quota. If that is also not found, the other quota will not be automatically acquired. If you have enough quota that is more expensive than the **Virtual machines** quota and it is applicable to a virtual machine, then you can log in to the Cyber Protect console and assign the **Servers** quota manually.

**Preventing unlicensed Microsoft 365 users from signing in**

You can prevent all unlicensed users in your Microsoft 365 organization from signing in by editing their sign-in status.

**To prevent unlicensed users from signing in**

1. Log in to the Microsoft 365 admin center ([https://admin.microsoft.com](https://admin.microsoft.com)) as a global administrator.
2. In the navigation menu, go to **Users > Active Users**.

   ![Microsoft 365 admin center](image)

3. Click **Filter**, and then select **Unlicensed users**.

4. Select the check boxes next to the user names, and then click the ellipsis (…) icon.

5. From the menu, select **Edit sign-in status**.
6. Select the **Block users from signing in** check box, and then click **Save**.

**Disaster Recovery quotas**

**Note**
The Disaster Recovery offering items are available only with the Disaster Recovery add-on.

These quotas are applied by the service provider to the entire company. Company administrators can view the quotas and the usage in the management portal, but cannot set quotas for a user.

- **Disaster recovery storage**
  The Disaster recovery storage shows the backup storage size of the servers that are protected with disaster recovery. The usage of the Disaster recovery storage equals the usage of the backup
storage of the workloads that are protected with disaster recovery servers. This storage is calculated starting from the time when a recovery server is created, regardless of whether the server is currently running. If the overage for this quota is reached, it will not be possible to create primary and recovery servers, or add/extend disks of the existing primary servers. If the overage for this quota is exceeded, it will not be possible to initiate a failover or start a stopped server. Running servers continue to run.

• **Compute points**
  This quota limits the CPU and RAM resources that are consumed by primary and recovery servers during a billing period. If the overage for this quota is reached, all primary and recovery servers are shut down. It is not possible to use these servers until the beginning of the next billing period. The default billing period is a full calendar month.
  When the quota is disabled, the servers cannot be used regardless of the billing period.

• **Public IP addresses**
  This quota limits the number of public IP addresses that can be assigned to the primary and recovery servers. If the overage for this quota is reached, it is not possible to enable public IP addresses for more servers. You can disallow a server to use a public IP address, by clearing the **Public IP address** check box in the server settings. After that, you can allow another server to use a public IP address, which usually will not be the same one.
  When the quota is disabled, all of the servers stop using public IP addresses, and thus become not reachable from the Internet.

• **Cloud servers**
  This quota limits the total number of primary and recovery servers. If the overage for this quota is reached, it is not possible to create primary or recovery servers.
  When the quota is disabled, the servers are visible in the Cyber Protect console, but the only available operation is **Delete**.

• **Internet access**
  This quota enables or disables the Internet access from the primary and recovery servers.
  When the quota is disabled, the primary and recovery servers will not be able to establish connections to the Internet.

**File Sync & Share quotas**

You can define the following File Sync & Share quotas for a tenant:

• **Users**
  This defines the limit to the number of File Sync & Share users.

  **Note**
  Only User and User + Administrator user roles count towards this quota.
  Administrator and Guest user roles are excluded from this quota.

• **Cloud storage**
  This defines the limit to the cloud storage allocated for the tenant.
Physical Data Shipping quotas

The Physical Data Shipping service quotas are consumed on a per-drive basis. You can save initial backups of multiple machines on one hard drive.

You can define the following Physical Data Shipping quotas for a tenant:

- **To the cloud**
  Allows sending an initial backup to the cloud data-center by using a hard disk drive. This quota defines the maximum number of drives to be transferred to the cloud data-center.

Notary quotas

You can define the following Notary quotas for a tenant:

- **Notary storage**
  Defines the maximum cloud storage space for notarized files, signed files, and files whose notarization or signing is in progress.
  To decrease usage of this quota, you can delete already notarized or signed files from notary storage.
- **Notarizations**
  Defines the maximum number of files that can be notarized using the notary service.
  A file is considered notarized as soon as it is uploaded to notary storage, and its notarization status changes to **In progress**.
  If the same file is notarized multiple times, each notarization counts as a new one.
- **eSignatures**
  Defines the maximum number of digital eSignatures.

Changing the service quota of machines

The protection level of a machine is defined by the service quota that is applied to it. Service quotas relate to the offering items available for the tenant in which the machine is registered.

A service quota is automatically assigned when a protection plan is applied to a machine for the first time.

The most appropriate quota is assigned, depending on the type of the protected machine, its operating system, required level of protection, and the quota availability. If the most appropriate quota is not available in your organization, the second-best quota is assigned. For example, if the most appropriate quota is **Web Hosting Server** but it is not available, the **Server** quota is assigned.

Examples of quota assignment:

- A physical machine that runs a Windows Server or a Linux server operating system (such as Ubuntu Server) is assigned the **Server** quota.
- A physical machine that runs a Windows or a Linux desktop operating system (such as Ubuntu Desktop) is assigned the **Workstation** quota.
• A physical machine that runs Windows 10 with enabled Hyper-V role is assigned the **Workstation** quota.

• A desktop machine that runs on a virtual desktop infrastructure and whose protection agent is installed inside the guest operating system (for example, Agent for Windows), is assigned the **Virtual machine** quota. This type of machine can also use the **Workstation** quota if the **Virtual machine** quota is not available.

• A desktop machine that runs on a virtual desktop infrastructure and which is backed up in the agentless mode (for example, by Agent for VMware or Agent for Hyper-V), is assigned the **Virtual machine** quota.

• A Hyper-V or vSphere server is assigned the **Server** quota.

• A server with cPanel or Plesk is assigned the **Web Hosting Server** quota. It can also use the **Virtual machine** or the **Server** quota, depending on the type of machine on which the web server runs, if the **Web Hosting Server** quota is not available.

• The application-aware backup requires the **Server** quota, even for a workstation.

You can manually change the original assignment later. For example, to apply a more advanced protection plan to the same machine, you might need to upgrade the machine's service quota. If the features required by this protection plan are not supported by the currently assigned service quota, the protection plan will fail.

Alternatively, you can change the service quota if you purchase a more appropriate quota after the original one is assigned. For example, the **Workstation** quota is assigned to a virtual machine. After you purchase a **Virtual machines** quota, you can manually assign this quota to the machine, instead of the original **Workstation** quota.

You can also release the currently assigned service quota, and then assign this quota to another machine.

You can change the service quota of an individual machine or for a group of machines.

**To change the service quota of an individual machine**

1. In the Cyber Protect console, go to Devices.
2. Select the desired machine, and then click Details.
3. In the Service quota section, click Change.
4. In the Change quota window, select the desired service quota or No quota, and then click Change.

**To change the service quota for a group of machines**

1. In the Cyber Protect console, go to Devices.
2. Select more than one machine, and then click Assign quota.
3. In the Change quota window, select the desired service quota or No quota, and then click Change.
Workload dependency on offering items

Depending on the enabled offering items, different workload types will be available in the Add devices pane in the Cyber Protect console. In the table below, you can see which workload types are available with different offering items.

<table>
<thead>
<tr>
<th>Workload type (Agent installer)</th>
<th>Enabled offering items</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Server(s)</td>
</tr>
<tr>
<td>Workstations – Agent for Windows</td>
<td>+</td>
</tr>
<tr>
<td>Workstations – Agent for macOS</td>
<td>+</td>
</tr>
<tr>
<td>Servers – Agent for Windows</td>
<td>+</td>
</tr>
<tr>
<td>Servers – Agent for Linux</td>
<td>+</td>
</tr>
<tr>
<td>Agent for Hyper-V</td>
<td></td>
</tr>
<tr>
<td>Agent for VMware</td>
<td></td>
</tr>
<tr>
<td>Agent for Virtuozzo</td>
<td></td>
</tr>
<tr>
<td>Agent for SQL</td>
<td>+</td>
</tr>
<tr>
<td>Agent for Exchange</td>
<td>+</td>
</tr>
<tr>
<td>Agent for Active Directory</td>
<td>+</td>
</tr>
<tr>
<td>Microsoft 365</td>
<td></td>
</tr>
<tr>
<td>Workload type (Agent installer)</td>
<td>Enabled offering items</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td></td>
<td>Servers</td>
</tr>
<tr>
<td>Business workloads</td>
<td></td>
</tr>
<tr>
<td>Google Workspace workloads</td>
<td></td>
</tr>
<tr>
<td>Full installer for Windows</td>
<td>+</td>
</tr>
<tr>
<td>Mobile (iOS and Android)</td>
<td></td>
</tr>
</tbody>
</table>
Using the management portal

The following steps will guide you through the basic use of the management portal.

Supported web browsers

The web interface supports the following web browsers:

- Google Chrome 29 or later
- Mozilla Firefox 23 or later
- Opera 16 or later
- Microsoft Edge 25 or later
- Safari 8 or later running in the macOS and iOS operating systems

In other web browsers (including Safari browsers running in other operating systems), the user interface might be displayed incorrectly or some functions may be unavailable.

Activating the administrator account

After signing the partnership agreement, you will receive an email message containing the following information:

- **Your login.** This is the user name that you use to log in. Your login is also shown on the account activation page.
- **Activate account** button. Click the button and set the password for your account. Ensure that your password is at least nine characters long. For more information about the password, refer to “Password requirements” (p. 26).

Password requirements

The password for a user account must be at least 9 characters long. Passwords are also checked for complexity, and fall into one of the following categories:

- Weak
- Medium
- Strong

You cannot save a weak password, even though it might contain 9 characters or more. Passwords that repeat the user name, the login, the user email, or the name of the tenant to which a user account belongs are always considered weak. Most common passwords are also considered weak.

To strengthen a password, add more characters to it. Using different types of characters, such as digits, uppercase and lowercase letters, and special characters, is not mandatory but it results in stronger passwords that are also shorter.
Accessing the management portal

1. Go to the service login page.
2. The address of the login page was included in the activation email message that you received.
3. Type the login, and then click Next.
4. Type the password, and then click Next.

Note
To prevent Cyber Protect Cloud from brute force attacks, the portal will lock you out after 10 unsuccessful login attempts. The lockout period is 5 minutes. The number of unsuccessful login attempts is reset after 15 minutes.

5. Use the menu to the right to navigate the management portal.

The timeout period for the management portal is 24 hours for active sessions and 1 hour for idle sessions.

Some services include the capability to switch to the management portal from the service console.

Configuring contacts in the Company profile wizard

You can configure contact information for your company. We will send updates on new features and other important changes in the platform to the contacts you provide.

When you log in to the management portal for the first time, the Company profile wizard guides you through the basic information about the company and the contacts to be provided.

You can create contacts from users that exist in the Cyber Protect platform or add contact information of people who do not have access to the service.

To configure company contacts using the Company profile wizard

1. In the Company information, specify the following details of your company:
   - Official (legal) company name
   - Company legal address (headquarters address)
     - Country
     - Zip code
2. Click Next.
3. In the Company contacts, configure contacts for the following purposes:
   - Billing contact — the contact that will get updates about important changes in usage reporting in the platform.
   - Business contact— the contact that will get updates about important business-related changes in the platform.
   - Technical contact— the contact that will get updates about important technical changes in the platform.
You can use a contact for more than one purpose. Select an option to create the contact.

- **Create from existing user.** Select a user from the drop-down list.
- **Create a new contact.** Provide the following contact information:
  - **First name** — First name of the contact person. This field is required.
  - **Last name** — Last name of the contact person. This field is required.
  - **Business email** — Email address of the contact person. This field is required.
  - **Business phone** — This field is optional.
  - **Job title** — This field is optional.

4. If you plan to use the Billing contact as a business or technical contact as well, select the corresponding flags in the **Billing contact** section:
   - **Use the same contact for Business contact**
   - **Use the same contact for Technical contact**

5. Click **Done**.

As a result, the contacts are created. You can edit the information and configure other contacts in the **Company Management > Company profile** section of the management console, as described in **Configuring company contacts**.

### Accessing the Cyber Protect console from the management portal

1. In the management portal, go to **Monitoring > Usage**.
2. Under **Cyber Protect**, select **Protection**, and then click **Manage service**.

   Alternatively, under **Clients**, select a customer, and then click **Manage service**.

As a result, you are redirected to the Cyber Protect console.

---

**Important**

If the customer is in **Self-service** management mode, you cannot manage services for him. Only the customer administrators can change the customer mode to **Managed by service provider**, and then manage the services.

### Navigation in the management portal

When using the management portal, at any given time you are operating within a tenant. The name of this tenant is indicated in the top-left corner.

By default, the highest hierarchy level available to you is selected. Click a tenant name in the list to drill down the hierarchy. To navigate back to an upper level, click its name in the top-left corner.
All parts of the user interface display and affect only the tenant in which you are currently operating. For example:

- The **Clients** tab displays only the tenants that are direct children of the tenant in which you are currently operating.
- The **Company Management** tab displays the company profile and the user accounts that exist in the tenant in which you are currently operating.
- By using the **New** button, you can create a tenant or a new user account only in the tenant in which you are currently operating. Note that you may have additional options in this menu, depending on the services you are subscribed to. For example, if you have activated Advanced Automation, you will also be able to create new tickets and time registrations.

### What's new in the Management portal

When new features of Cyber Protect Cloud are released, you see a pop-up window with a brief description of these features upon logging in to the Management portal. You can also view the description of the new features by clicking the **What's new** link in the bottom-left corner of the main Management portal window.

### Limiting the access to the web interface

Administrators can limit access to the web interface by specifying a list of IP addresses from which the members of a tenant are allowed to log in.

This restriction also applies to accessing the management portal via API.

This restriction applies only at the level where it is set. It is *not* applied to the members of the child tenants.

*To limit access to the web interface*
1. Log in to the management portal.
2. Navigate to the tenant in which you want to limit the access.
3. Click Settings > Security.
4. Enable the Login control switch.
5. In Allowed IP addresses, specify the allowed IP addresses.
   You can enter any of the following parameters, separated by a semicolon:
   • IP addresses, for example: 192.0.2.0
   • IP ranges, for example: 192.0.2.0-192.0.2.255
   • Subnets, for example: 192.0.2.0/24
6. Click Save.

Note
For service providers who use Cyber Infrastructure (hybrid model):
If the Login control switch is enabled under Settings > Security in the management portal, add the external public IP address (or addresses) of the Cyber Infrastructure nodes to the Allowed IP addresses list.

Accessing the services

Overview tab
The Overview > Usage section provides an overview of the service usage and enables you to access the services within the tenant in which you are operating.

To manage a service for a tenant by using the Overview tab
1. Navigate to the tenant for which you want to manage a service, and then click Overview > Usage.
   Note that some services can be managed at the partner tenant and at the customer tenant levels, while other services can be managed only at the customer tenant level.
2. Click the name of the service that you want to manage, and then click Manage service or Configure service.
   For information about using the services, refer to the user guides that are available in the service
consoles.

Clients tab

The Clients tab displays the child tenants of the tenant in which you are operating and enables you to access the services within them.

To manage a service for a tenant by using the Clients tab

1. Do one of the following:
   - Click Clients, select the tenant for which you want to manage a service, click the name or icon of the service that you want to manage, and then click Manage service or Configure service.
   - Click Clients, click the ellipsis icon next to the name of the tenant for which you want to manage a service, click Manage service, and then select the service that you want to manage.
Note that some services can be managed at the partner tenant and at the customer tenant levels, while other services can be managed only at the customer tenant level.

For information about using the services, refer to the user guides that are available in the service consoles.

### 7-day history bar

On the **Clients** screen, the **7-day history** bar shows the status of the workload backups for each customer tenant for the last seven days. The bar is divided into 168 colored lines. Each line represents a one-hour interval, and displays the worst status of a backup within the corresponding one-hour interval.

The following table provides information about the meaning of each color of the lines.

<table>
<thead>
<tr>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>red</td>
<td>at least one of the backups during the one-hour period failed</td>
</tr>
<tr>
<td>orange</td>
<td>at least one of the backup during the one-hour period completed with a warning, but without any backup errors</td>
</tr>
<tr>
<td>green</td>
<td>there was at least one successful backup during the one-hour period, without any backup errors and warnings</td>
</tr>
<tr>
<td>grey</td>
<td>there were no completed backups during the one-hour period</td>
</tr>
</tbody>
</table>

The **7-day history** bar shows "No backups" until the corresponding statistics is gathered.

For partner tenants, the **7-day history** bar is empty, as the aggregated statistics is not supported.

### User accounts and tenants

There are two user account types: administrator accounts and user accounts.
• **Administrators** have access to the management portal. They have the administrator role in all services.

• **Users** do not have access to the management portal. Their access to the services and their roles in the services are defined by an administrator.

Each account belongs to a tenant. A tenant is a part of the management portal resources (such as user accounts and child tenants) and service offerings (enabled services and offering items within them) dedicated to partner or a customer. The tenant hierarchy is supposed to match the client/vendor relationships between the service users and providers.

• A tenant type of **Partner** typically corresponds to service providers that resell the services.

• A tenant type of **Folder** is a supplementary tenant that is typically used by partner administrators to group partners and customers to configure separate offerings and/or different branding.

• A tenant type of **Customer** typically corresponds to organizations that use the services.

• A tenant type of **Unit** typically corresponds to units or departments within the organization.

An administrator can create and manage tenants, administrator accounts, and user accounts on or below their level in the hierarchy.

An administrator of parent tenant of type **Partner** can act as a lower-level administrator in tenants of type **Customer** or **Partner**, whose management mode is **Managed by service provider**. Thus, the partner-level administrator can, for example, manage user accounts and services, or access backups and other resources in the child tenant. However, the administrators at the lower level can limit the access to their tenant for higher-level administrators.

The following diagram illustrates an example hierarchy of the partner, folder, customer, and unit tenants.
The following table summarizes operations that can be performed by the administrators and users.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Users</th>
<th>Customer and unit administrators</th>
<th>Partner and folder administrators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create tenants</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create accounts</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Download and install the software</td>
<td>Yes</td>
<td>Yes</td>
<td>No*</td>
</tr>
<tr>
<td>Manage services</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create reports about the service usage</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Configure branding</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Note**
A user can be created from any type of tenant, and to have a shared email address as long as it is created from the most privileged to the least privileged. For example, a partner tenant can create a Folder, Customer and Unit tenant, while a Customer tenant cannot create a Folder tenant.

**Managing tenants**

The following tenants are available in Cyber Protect:

- A **Partner** tenant is normally created for each partner that signs the partnership agreement.
- A **Folder** tenant is normally created to group partners and customers to configure separate offerings and/or different branding.
- A **Customer** tenant is normally created for each organization that signs up for a service.
- A **Unit** tenant is created within a customer tenant to expand the service to a new organizational unit.

The steps for creating and configuring a tenant vary depending on the tenant that you create, but in general the process consists of the following steps:

1. Create the tenant.
2. Select services for the tenant.
3. Configure the offering items for the tenant.

**Creating a tenant**

1. Log in to the management portal.
2. **Navigate to the tenant** in which you want to create a tenant.
3. In the upper-right corner, click **New**, and then click one of the following, depending on the type of the tenant that you want to create:
• A Partner tenant is normally created for each partner that signs the partnership agreement.
• A Folder tenant is normally created to group partners and customers to configure separate offerings and/or different branding.
• A Customer tenant is normally created for each organization that signs up for a service.
• A Unit tenant is created within a customer tenant to expand the service to a new organizational unit.

A Supplier tenant is also available, but only if Advanced Automation is enabled. Suppliers are created in the Suppliers tab, which is accessed by navigating to Sales and billing > Company management.

The available types depend on the parent tenant type. Note that if the Advanced Automation service is enabled, you can also select the relevant tenant type in the Billing information section (see “Defining billing information for a tenant” (p. 39)).

4. In Name, specify a name for the new tenant.

5. [Only when creating a partner tenant] Enter Official (legal) company name (required) and VAT number/TAX ID/Company registration number (optional).

6. [Only when creating a customer tenant] In Mode, select whether the tenant is using services in the trial mode or in the production mode. Monthly service usage reports do not include usage data for trial-mode tenants.

**Important**

If you switch the mode from trial to production in the middle of a month, the entire month will be included in the monthly service usage report. For this reason, we recommend that you switch the mode on the first day of a month. The mode is automatically switched to production when a tenant remains in the trial mode for one full month.

There are two possible scenarios to automatically switch tenants' trial mode to production:
• In the middle of a month, in which case the entire next month will be also included in the monthly service usage report.
• [Recommended option] On the first day of a month – then only the current month will be counted.

7. In Management mode, select one of the following modes for managing access to the tenant:
• Self-service – this mode limits access to this tenant for administrators of the parent tenant: they can only modify the tenant properties, but cannot access or manage anything inside (e.g. tenants, users, services, backups, and other resources).
• Managed by service provider – this mode grants full access to the tenant for administrators of the parent tenant: modify properties, manage tenants, users, services; access backups and other resources.

Only the administrator of the tenant created by you will be able to change the Management mode if it is Self-service. For this, the administrator of the created tenant can go to Settings > Security and set up the Support access switch.

You can check the selected Management mode for your child tenants in the Clients tab.
8. In **Security**, enable or disable two-factor authentication for the tenant. 
   If enabled, all users of this tenant will be required to set up two-factor authentication for their
   accounts for more secure access. Users must install the authentication application on their
   second-factor devices and use the one-time generated TOTP code along with the traditional login
   and password to log in to the console. For more details, refer to "Setting up two-factor
   authentication". To view the two-factor authentication status for your customers, go to **Clients**.

9. [Only when creating a customer tenant in the Enhanced security mode] In **Security**, select the
    **Enhanced security mode** check box.
    With this mode, only encrypted backups are allowed. The encryption password must be set on
    the protected device and without it, creating backups will fail. All operations that require
    providing the encryption password to a cloud service are not available. For more details, refer to
    "Enhanced security mode" (p. 38).

   **Important**
   You cannot disable the Enhanced security mode after the tenant is created.

10. In **Create administrator**, configure an administrator account.

   **Note**
   The creation of an administrator is mandatory for a customer tenant and for a partner tenant
   with **Management mode** set to **Self-service**.

   a. Enter an email for the administrator account. This email will also serve as a login.
   b. If you prefer to use a login that is different from the email, select the check box **Use login
      that is different from email**, and then enter a login name and email for the administrator
      account.
      The rest of the fields are optional, but provide more communication channels in case we
      need to contact the administrator.
   c. Select a language.
      If you do not select a language, English will be used by default.
   d. Specify the company contacts.
      • **Billing**—the contact that will get updates about important changes in usage reporting in
        the platform.
      • **Technical**—the contact that will get updates about important technical changes in the
        platform.
      • **Business**—the contact that will get updates about important business-related changes in
        the platform.
      You can assign more than one company contact to a user.

11. In **Language**, change the default language of notifications, reports, and the software that will be
    used within this tenant.

12. Do one of the following:
    • To finish the tenant creation, click **Save and close**. In this case, all services will be enabled for
      the tenant. The billing mode for the Protection service will be set to per workload.
To select services for the tenant, click **Next**. See "Selecting the services for a tenant" (p. 40).

Note that if Advanced Automation is activated, you can now define billing information for your client in order to bill them for provided services and products.

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**Enhanced security mode**

The Enhanced security mode is designed for clients with higher security demands. This mode requires mandatory encryption for all backups and allows only locally set encryption passwords.

With the Enhanced security mode, all backups created in a customer tenant and its units are automatically encrypted with the AES algorithm and a 256-bit key. Users can set the encryption passwords only on the protected devices, and cannot set them in the protection plans.

**Important**

A partner administrator can enable the Enhanced security mode only when creating a new customer tenant, and cannot disable this mode later. Enabling the Enhanced security mode for already existing tenants is not possible.

---

**Limitations**

- The Enhanced security mode is compatible only with agents version 15.0.26390 or higher.
- The Enhanced security mode is not available for devices running Red Hat Enterprise Linux 4.x or 5.x, and their derivatives.
- Cloud services cannot access encryption passwords. Due to this limitation, some features are not available for tenants in the Enhanced security mode.

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**Unsupported features**

The following features are not available for tenants in the Enhanced security mode:

- Recovery through the Cyber Protect console
- File-level browsing of backups through the Cyber Protect console
- Cloud-to-cloud backup
- Website backup
- Application backup
- Backup of mobile devices
- Antimalware scan of backups
- Safe recovery
- Automatic creation of corporate whitelists
- Data protection map
- Disaster recovery
- Reports and dashboards related to the unavailable features
Defining billing information for a tenant

When Advanced Automation is activated for a tenant, you need to define billing information for the tenant. Billing information enables the tenant to bill for services and products they provide.

**Note**
If billing information is not defined at this stage, you will be prompted to enter the relevant information before using certain features of Advanced Automation, such as when approving time registrations, or creating contracts or sales items. For more information, see “Onboarding existing clients” (p. 160).

**To define billing information**

1. In the Billing information section of the create/edit tenant dialog, define the following fields:
   - **Business name**: The tenant's business name.
   - **Legal form**: The correct legal business name for the tenant.
   - **Type**: The Advanced Automation tenant type (select from Partner, Customer, Prospect)
   - **Debtor code**: (Optional) The customer code used in third party systems, such as accounting software.
   - **Email**: The tenant's email address, predefined with the administrator email address used in the General information section.
   - **Website**: (Optional) The tenant's website.
   - **Main office**: (Optional) Select the parent company from the list.
   - **VAT / Sales tax number**: (Optional) The relevant VAT or sales tax number.
   - **Time registration roundup time (minutes)**: Set the time (in minutes) of your ticket roundup time. When ticket work is approved for billing, the total billable hours will be rounded up according to this value. For example, if you set the roundup time value to 15 minutes, 7 minutes of ticket work will be rounded up to 15 before invoicing. Likewise, 21 minutes will be rounded up to 30, and 36 minutes will be rounded to 45, and so on. The default value is 10.
   - **Payment terms (days)**: (Optional) Define the number of days in which a customer has to make payment.
   - **Direct debit**: (Optional) Select the check box if payment will be made by direct debit. When enabled, direct debit payments are available in contracts, sales items, and invoices. This option enables the billing process to split direct debit line items from manual payment line items; each of these line item types are split over two different invoices and processed separately:
     - Customers can pay invoices via wire transfer or using one of the payment integrations (PayPal, Stripe).
     - Customers can send invoices to their local bank for direct debit processing.
   - **Create subtotals on invoice**: (Optional) Select the check box, if required.
   - **Consolidate billing into one invoice**: (Optional) Select the check box, if required.
• In the **Sales tax** section (optional), select the relevant sales tax (the default tax for the company). If no sales tax is selected, the default tax rate is applied. You can also select the **Tax exempt** check box if the tenant is tax exempt.
• In the **Bank account** section (optional), enter the bank account number for the tenant.
• In the **Address** section, enter the relevant address fields.

2. To configure the services for the tenant, click **Next**. See "Selecting the services for a tenant" (p. 40).

**Selecting the services for a tenant**

By default, all services are enabled when you create a new tenant. You can select which services will be available to the users within the tenant and its child tenants.

You can also select and enable services for multiple existing tenants in one action. For more information, see "Enabling services for multiple existing tenants" (p. 41).

This procedure is not applicable to a unit tenant.

*To select the services for a tenant*

1. In the **Select services** section of the create/edit tenant dialog, select a billing mode or an edition.
   • Select **Per workload** or **Per gigabyte** billing mode, and then clear the check boxes for the services that you want to disable for the tenant.
   The set of services is identical for both billing modes.
   For Advanced Disaster Recovery, if you registered your own disaster recovery location under your account, you can select the location for disaster recovery from the drop-down list.
   • To use a legacy edition, select the **Legacy Editions** radio button, and select an edition from the drop-down list.
   Disabled services will be hidden from the users within the tenant and its child tenants.

2. Do one of the following:
   • To finish the tenant creation, click **Save and close**. In this case, all offering items for the selected services will be enabled for the tenant with unlimited quota.
   • To configure the offering items for the tenant, click **Next**. See "Configuring the offering items for a tenant" (p. 40).

**Configuring the offering items for a tenant**

When you create a new tenant, all offering items for the selected services are enabled. You can select which offering items will be available to the users within the tenant and its child tenants, and set quotas for them.

This procedure is not applicable to a unit tenant.

*To configure the offering items for a tenant*

1. On the **Configure services** section of the create/edit tenant dialog, under each service tab, clear the check boxes for the offering items that you want to disable.
The functionality that corresponds to the disabled offering items will be unavailable for the users within the tenant and its child tenants.

**Note**
You can disable offering items that are related to advanced protection functionality, but they will be automatically re-enabled when a user enables an advanced feature in a protection plan.

2. For some services, you can select storages that will be available to the new tenant. Storages are grouped by locations. You can select from the list of locations and storages that are available to your tenant.
   - When creating a partner/folder tenant, you can select multiple locations and storages for each service.
   - When creating a customer tenant, you must select one location, and then select one storage per service within this location. The storages assigned to the customer can be changed later, but only if their usage is 0 GB – that is, either before the customer starts using the storage or after the customer removes all the backups from this storage. The information about the storage space usage is not updated in real time. Please allow up to 24 hours for the information to be updated.

   For details about storages, refer to "Managing locations and storage".

3. To specify the quota for an item, click on the **Unlimited** link next to the offering item. These quotas are "soft". If any of these values are exceeded, an email notification is sent to the tenant administrators and the administrators of the parent tenant. Restrictions on using the services are not applied. For a partner tenant it is expected that the offering item usage can exceed the quota because the overage cannot be set when creating a partner tenant.

4. [Only when creating a customer tenant] Specify the quota overages.
   An overage allows a customer tenant to exceed the quota by the specified value. When the overage is exceeded, restrictions on using the corresponding service are applied.

5. Click **Save and close**.

The newly created tenant appears on the **Clients** tab of the management console.

If you want to edit the tenant settings or change the administrator, select the tenant on the **Clients** tab, and then click the pencil icon in the section that you want to edit.

**Enabling services for multiple existing tenants**

You can mass-enable services, editions, packs, and offering items for multiple tenants (up to a maximum of 100 tenants in one session).

This procedure is applicable to sub-root, partner, folder, and customer tenants. Tenants of any of these different types can be selected simultaneously.

**To enable services for multiple tenants**

1. In the management portal, go to **Clients**.
2. In the top right corner, click **Configure services**.
3. Select each of the tenants you want to enable services for by selecting the check box next to the tenant name, and then click **Next**.

4. In the **Select services** section, select the relevant services you want to apply to all of the selected tenants, and then click **Next**.

   **1. Select services**

   Select the services and editions that you want to enable for the selected tenants.

   **Cyber Protect**

   All-in-one cyber protection solution that integrates advanced data protection, file sync and share, file notarization and e-signing, and physical data shipping functionality.

   **Protection**

   Provides all aspects of cyber protection for workloads through backup, antivirus, antimalware, anti-ransomware, monitoring, management, and disaster recovery functionality.

   **Per workload**

   The billing is based on the number of protected workloads, and cloud storage is charged separately.

   **Add advanced protection:**
   - [ ] Advanced Backup
   - [ ] Advanced Management
   - [ ] Advanced Security + EDR
   - [ ] Advanced Security
   - [ ] Advanced Email Security
   - [ ] Advanced Data Loss Prevention

   **Note**

   You cannot disable a previously enabled service in this screen. All services, editions, and offering items that were selected before you began this procedure will remain enabled.

5. In the **Configure services** section, select the service features and offering items you want to enable for the selected tenants, and then click **Next**.

6. In the **Summary** section, review the changes that will be applied to the selected tenants.

   You can click **Expand all** to see all the tenants' selected services and offering items that will be applied. Alternatively, you can expand each tenant to view the selected services and offering items specific to that tenant.

7. **Click Apply changes.** While the services are configured for each tenant, the tenant is disabled, and the **Tenant status** column indicates the services and offering items are currently being configured, as shown below.
8. When the configuration of services and offering items is successfully applied to the selected tenants, a confirmation message is displayed.

If for some reason the services and offering items could not be applied to a tenant, the Tenant status column shows Not applied. Click Try again to review the configuration for the selected tenants.

Viewing and updating a tenant's configuration

After a tenant has been created and configured, you can view and update their configured services and offerings as and when required.

To view and update a tenant's configuration

1. In the management portal, go to Clients.
2. Click the ellipsis icon for the tenant you want to view or update, and then select Configure.
3. In the right pane, you can:
   - Update the settings for available services by clicking on the relevant service tab. For example, click the Protection tab to update and manage the service.
   - Click the Configure tab to view and update sections in the tenant's configuration, including:
     - Service: Enable and disable services, as required.
     - Company profile: Update the company profile, add and remove company contacts, as required.
     - General settings: Update general information about the company, including the name, country, language and the status of the Enhanced security mode.
     - Billing information: Available only for the activated Advanced Automation service, you can update your billing and address details.
     - Finance: (Read-only) Available only for the activated Advanced Automation service, you can view a number of key metrics, including the current value of contracts and sales items to be invoiced, and the number of end users being served.
     - Tickets: (Read-only) Available only for the activated Advanced Automation service, you can view key metrics, including open tickets, SLA breaches, and unassigned tickets. You can also view a list of current open tickets.
     - Service desk: Available only for the activated Advanced Automation service, you can update the tenant's default settings.
For Supplier tenants, only the **Company profile**, **General settings**, and **Billing information** tabs are displayed.

### Enabling maintenance notifications

As a Partner user, you can allow your child tenants (partners and customers) to receive maintenance notification emails directly from the Cyber Protect data center, and receive in-product maintenance notifications inside the Management portal. This will help you to reduce the number of maintenance-related support calls.

**Note**

The maintenance notification emails are branded by the data center. Custom branding is not supported for these notifications.

**To enable the maintenance notifications for child partners or customers**

1. Log in to the management portal as a Partner user, click **Clients**, and then click the name of a partner or customer tenant for whom you want to enable the maintenance notifications.
2. Click **Configure**.
3. On the **General settings** tab, locate the **Maintenance notifications** option and enable it.
   
   If you do not see the **Maintenance notifications** option, contact your service provider.

**Note**

Maintenance notifications are enabled, but will not be sent until the selected tenant enables the notifications for their users or further propagates this option to child partners or customers to enable notifications for their users.

**To enable the maintenance notifications for a user**

1. Log in to the management portal as a Partner user or a Company administrator. As Partner, you can access the users for all tenants that are managed by you.
2. Navigate to **Company Management > Users**, and then click the name of a user for whom you want to enable the maintenance notifications.
3. On the **Services** tab, in the **Settings** section, click the pencil to edit the options.
4. Select the **Maintenance notifications** check box and click **Done**.

The selected user will receive email notifications for upcoming maintenance activities on the data center.

### Configuring self-managed customer profile

As a partner, you can configure self-managed customer profiles for the tenants managed by you. This option allows you to control visibility of tenants profile and contact information to each of your customers.
To configure self-managed customer profile

1. In the management portal, go to Clients.
2. Select the client for which you want to configure the self-managed customer profile.
3. Select the Configure tab, and then select the General settings tab.
4. Enable or disable the Enable self-managed customer profile switch.

When the self-managed customer profile is enabled, this client will see the Company profile section in the navigation menu and the contact-related fields in the user creation wizard (Business phone, Company contact and Job title).

When the self-managed customer profile is disabled, the Company profile section in the navigation menu and the contact-related fields in the user creation wizard will be hidden.

Configuring company contacts

As a partner, you can configure contact information for your company and for the tenants managed by you. We will send updates on new features and other important changes in the platform to the contacts in this list.

You can add multiple contacts and assign company contacts, depending on the user role. You can create contacts from users that exist in the Cyber Protect platform or add contact information of people who do not have access to the service.

To configure contacts for your company

1. In the management console, go to Company Management > Company profile.
2. In the Contacts section, click +.
3. Select an option to create the contact.
   • Create from existing user
     ○ Select a user from the drop-down list.
     ○ Select a company contact.
       ▪ Billing—the contact that will get updates about important changes in usage reporting in the platform.
       ▪ Technical—the contact that will get updates about important technical changes in the platform.
       ▪ Business—the contact that will get updates about important business-related changes in the platform.
       You can assign more than one company contact to a user.
   If you delete a contact that is associated with a user from the list of contacts in the Company profile, the user will not be deleted. The system will unassign all company contacts for the user, so they will no longer appear in the Company contacts column of the Users list.
   If you want to change the email address of the contact that is associated with the user, the system will request verification of the newly defined address. An email will be sent to this address, and the user will need to confirm the change.
• **Create a new contact**
  - Provide the contact information.
    - **First name**—First name of the contact person. This field is required.
    - **Last name**—Last name of the contact person. This field is required.
    - **Business email**—Email address of the contact person. This field is required.
    - **Business phone**—This field is optional.
    - **Job title**—This field is optional.
  - Select the **Company contacts**.
    - **Billing**—the contact that will get updates about important changes in usage reporting in the platform.
    - **Technical**—the contact that will get updates about important technical changes in the platform.
    - **Business**—the contact that will get updates about important business-related changes in the platform.

You can assign more than one company contact to a user.

4. Click **Add**.

**To configure contacts for a tenant**

**Note**
If you modify the contact information for a child tenant, your changes will be visible to the tenant.

1. In the management portal, go to **Clients**.
2. Click the tenant, and click **Configure**.
3. In the **Contacts** section, click **+**.
4. Select an option to create the contact.

• **Create from existing user**
  - Select a user from the drop-down list.
  - Select a company contact.
    - **Billing**—the contact that will get updates about important changes in usage reporting in the platform.
    - **Technical**—the contact that will get updates about important technical changes in the platform.
    - **Business**—the contact that will get updates about important business-related changes in the platform.
      
You can assign more than one company contact to a user.

If you delete a contact that is associated with a user from the list of contacts in the Company profile, the user will not be deleted. The system will unassign all company contacts for the user, so they will no longer appear in the **Company contacts** column of the **Users** list.
If you want to change the email address of the contact that is associated with the user, the system will request verification of the newly defined address. An email will be sent to this address, and the user will need to confirm the change.

- **Create a new contact**
  - Provide the contact information.
    - **First name**—First name of the contact person. This field is required.
    - **Last name**—Last name of the contact person. This field is required.
    - **Business email**—Email address of the contact person. This field is required.
    - **Business phone**—This field is optional.
    - **Job title**—This field is optional.
  - Select the **Company contacts**.
    - **Billing**—the contact that will get updates about important changes in usage reporting in the platform.
    - **Technical**—the contact that will get updates about important technical changes in the platform.
    - **Business**—the contact that will get updates about important business-related changes in the platform.
      You can assign more than one company contact to a user.

5. Click **Add**.

### Refreshing the usage data for a tenant

By default, the usage data is refreshed at fixed intervals. You can refresh the usage data for a tenant manually.

1. In the management console, go to **Clients**.
2. Click the tenant, and click the ellipsis in the tenant row.
3. Select **Refresh usage**.

**Note**

Fetching the data may take up to 10 minutes.

4. Reload the page to view the updated data.

### Disabling and enabling a tenant

You may need to disable a tenant temporarily. For example, in case your tenant has debts for using services.

**To disable a tenant**

1. In the management portal, go to **Clients**.
2. Select the tenant that you want to disable, then click the ellipsis icon > **Disable**.
3. Confirm your action by clicking **Disable**.

As the result:
• The tenant and all its sub-tenants will be disabled, their services will be stopped.
• Billing of the tenant and its sub-tenants will be continued as their data will be preserved and stored in Cyber Protect Cloud.
• All API clients within the tenant and its sub-tenants will be disabled and all integrations using these clients will stop working.

To enable a tenant, select it in the client list, then click the ellipsis icon > **Enable**.

**Moving a tenant to another tenant**

The management portal enables you to move a tenant from one parent tenant to another parent tenant. This may be useful if you want to transfer a customer from one partner to another partner, or if you created a folder tenant to organize your clients and want to move some of them to the newly created folder tenant.

**Type of tenants that can be moved**

<table>
<thead>
<tr>
<th>Type of tenant</th>
<th>Can be moved</th>
<th>Target tenant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>Yes</td>
<td>Partner or Folder</td>
</tr>
<tr>
<td>Folder</td>
<td>Yes</td>
<td>Partner or Folder</td>
</tr>
<tr>
<td>Customer</td>
<td>Yes</td>
<td>Partner or Folder</td>
</tr>
<tr>
<td>Unit</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

**Requirements and restrictions**

• You can move a tenant only if the target parent tenant has the same or a larger set of services and offering items as the original parent tenant.
• When moving a customer tenant, all storages assigned to the customer tenant in the original parent tenant must exist in the target parent tenant. This is required because the customer service-related data cannot be moved from one storage to another storage.
• In customer tenants that are managed by service providers, there can be plans that are applied to customer workloads from the service provider level (for example, scripting plans). When moving such a customer tenant, the plans of the service provider will be revoked from the customer workloads and all services associated with these plans will stop working for this customer.
• You can move tenants inside your partner account hierarchy. You can also move some customer tenants to a target tenant outside your partner account hierarchy. To learn whether that operation is possible, contact your account manager.
• Only administrators (for example, Administrator in Management Portal or Company administrator) can move tenants to different parent tenants.

How to move a tenant

1. Log in to the management portal.
2. Find and copy the Internal ID of the target partner or folder tenant to which you want to move a tenant. Do the following:
   a. On the Clients tab, select the target tenant to which you want to move a tenant.
   b. On the tenant properties panel, click the vertical ellipsis icon, and then click Show ID.
   c. Copy the text string that is shown in the Internal ID field, and then click Cancel.
3. Select the tenant that you want to move, and then move it to the target partner/folder. Do the following:
   a. On the Clients tab, select the tenant that you want to move.
   b. On the tenant properties panel, click the vertical ellipsis icon, and then click Move.
   c. Paste the internal identifier of the target tenant, and then click Move.

The operation starts immediately and takes up to 10 minutes.

If the tenant that you are moving has child tenants (for example, it is a partner or folder tenant with a customer tenant inside), the whole tenant sub-tree will be moved to the target tenant.

Converting a partner tenant to a folder tenant and vice versa

The management portal enables you to convert a partner tenant to a folder tenant.

This may be useful if you used a partner tenant for grouping purposes and now want to organize your tenant infrastructure properly. This is also useful if you want the operational dashboard to include aggregated information about the tenant.

You can also convert a folder tenant to a partner tenant.

Note
The conversion is a safe operation and does not affect the users within the tenant and any service-related data.

To convert a tenant

1. Log in to the management portal.
2. On the Clients tab, select the tenant that you want to convert.
3. Do one of the following:
   • Click the ellipsis icon next to the tenant name.
   • Select the tenant, and then click the ellipsis icon on the tenant properties panel.
4. Click Convert to folder or Convert to partner.
5. Confirm your decision.
Limiting the access to your tenant

Administrators at the customer level and higher can limit the access to their tenants for higher-level administrators.

If access to the tenant is limited, the parent tenant administrators can only modify the tenant properties. They do not see the accounts and child tenants at all.

To prevent higher-level administrators from accessing your tenant

1. Log in to the management portal.
2. Go to Settings > Security.
3. Disable the Support access switch.

As a result, the administrators of the parent tenants will have limited access to your tenant. They will only be able to modify the tenant properties, but won't be able to access or manage anything inside (e.g. tenants, users, services, backups and other resources).

If the Support access switch is enabled, then the administrators of the parent tenants will have full access to your tenant. They will be able to do the following: modify properties; manage tenants, users, and services; access backups, and other resources.

Deleting a tenant

You may want to delete a tenant in order to free up the resources that it uses. The usage statistics will be updated within a day after deletion. For large tenants it might take longer.

Before deleting a tenant, you have to disable it. For more information on how to do this, refer to Disabling and enabling a tenant.

Note
While Cyber Protect offers an opportunity to recover tenants, please note that recovery is not supported for the File Sync&Share service.

To delete a tenant

1. In the management portal, go to Clients.
2. Select the disabled tenant that you want to delete, and then click the ellipsis icon > Delete.
3. To confirm your action, enter your login, and then click Delete.

As a result:

- The tenant and its sub-tenants will be deleted.
- All services that were enabled within the tenant and its sub-tenants will be stopped.
- All users within the tenant and its sub-tenants will be deleted.
- All machines in the tenant and its sub-tenants will be unregistered.
• All service-related data, for example backups and synced files, in the tenant and its sub-tenants will be deleted.
• All API clients within the tenant and its sub-tenants will be deleted and all integrations using these clients will stop working.
• You will see the Tenant status as Deleted. When you hover over the Deleted status, you will see the date when the tenant was deleted and the note that you can still recover all relevant data and settings within 30 days of this deletion date.

**Recovering a tenant**

A tenant can be deleted accidentally, so Cyber Protect offers an opportunity to recover tenants.

You might need to recover a tenant for example in the following cases:

• The Partner has accidentally deleted his tenants.
• The Partner development team have accidentally deleted a part of or even the whole tenants hierarchy while testing their integration.
• The Partner integration accidentally de-provisioned the application instead of switching to the new edition, and you need to restore the data.
• The Partner has accidentally disabled the application while switching to new licensing, and you need to restore the data in the disabled application.

**To recover a tenant**

1. In the management portal, go to Clients.
2. On the Cyber Protect tab, find the tenant that you want to recover. Its status is displayed as Deleted.
3. Hover over the tenant, and then click the ellipsis icon...
4. Click Recover.
   You will see a confirmation window saying that the tenant will be recovered in the same state it was before being deleted, and it will be disabled by default.
5. [Optional] If you need to enable the tenant, select the check box I want to enable the tenant. You can enable the tenant at any time later.
6. Click Recover.

As a result:

• The tenant and its sub-tenants will be recovered.
• All services that were enabled within the tenant and its sub-tenants will be restarted.

**Note**

Recovery is not supported for the File Sync&Share service.

• All users within the tenant and its sub-tenants will be recovered.
• All machines in the tenant and its sub-tenants will be re-registered.
• All service-related data, for example backups, in the tenant and its sub-tenants will be recovered.
• All API clients within the tenant and its sub-tenants will be recovered and all integrations using these clients will start working again.
• You will see the Tenant status as Active, if you have enabled the tenant, or as Disabled, if you have not enabled the tenant yet.

Managing users
Partner administrators, Customer administrators, and Unit administrators can configure and manage user accounts under the tenants that are accessible to them.

Creating a user account
You may want to create additional accounts in the following cases:
• Partner/folder administrator accounts — to share the services management duties with other people.
• Customer/prospect/unit administrator accounts — to delegate the service management to other people whose access permissions will be strictly limited to the corresponding customer/prospect/unit.
• User accounts within the customer or a unit tenant — to enable the users to access only a subset of the services.

Be aware that existing accounts cannot be moved between tenants. First, you need to create a tenant, and then populate it with accounts.

To create a user account
1. Log in to the management portal.
2. Navigate to the tenant in which you want to create a user account. See "Navigation in the management portal" (p. 28).
3. In the upper-right corner, click New > User.
   Alternatively, go to Company management > Users, and click + New.
4. Specify the following contact information for the account:
   a. Email. This email will also serve as a login.
   b. If you prefer to use a login that is different from the email, select the check box Use login that is different from email, and then enter Login and Email.

   **Important**
   Each account must have a unique login.
Important
If the user is registered in the File Sync & Share service, please provide the email that was used for the File Sync & Share registration.
Please note that each customer user account must have a unique email address.

c. **First name**
d. **Last name**
e. [Optional] **Business phone**

**Note**
Fields like **Business phone**, **Job title** and **Company contact** are displayed in user creation wizard only if the parent partner has enabled the **Enable self-managed customer profile** option for the customer tenant. Otherwise, these fields are not displayed.

f. [Optional] **Job title**
g. In **Language**, change the default language of notifications, reports, and the software that will be used for this account.

5. [Optional] Specify the company contacts.
   - **Billing**—the contact that will get updates about important changes in usage reporting in the platform.
   - **Technical**—the contact that will get updates about important technical changes in the platform.
   - **Business**—the contact that will get updates about important business-related changes in the platform.

   You can assign more than one company contact to a user.

You can view the assigned company contacts for a user in the **Users** list, in column **Company contacts**, and edit the user account to change the company contacts if needed.

6. [Not available when creating an account in a partner / folder tenant] Select the services to which the user will have access and the roles in each service.

   Available services depend on the services that are enabled for the tenant in which the user account is created.
   - If you select the **Company administrator** check box, the user will have access to the management portal and the administrator role in all services that are currently enabled for the tenant. The user will also have the administrator role in all services that will be enabled for the tenant in the future.
   - If you select the **Unit administrator** check box, the user will have access to the management portal, but may or not have the service administrator role, depending on the service.
   - Otherwise, the user will have the **roles that you select in the services that you select**.

7. Click **Create**.

The newly created user account appears on the **Users** tab under **Company Management**.
If you want to edit the user settings, or specify notification settings and quotas (not available for partner/folder administrators) for the user, select the user on the Users tab, and then click the pencil icon in the section that you want to edit.

To reset a user’s password

1. In the management portal, go to Company Management > Users.
2. Select the user whose password you want to reset, and then click the ellipsis icon > Reset password.
3. Confirm your action by clicking Reset.

The user can now complete the resetting process by following the instructions in the email received.

For services that do not support two-factor authentication (for example, registration in Cyber Infrastructure), you may need to convert a user account into a Service account — an account that does not require two-factor authentication.

To convert a user account to the service account type

1. In the management portal, go to Company Management > Users.
2. Select the user whose account you want to convert to the service account type, and then click the ellipsis icon > Mark as service account.
3. In the confirmation window, enter the two-factor authentication code and confirm your action.

The account can now can be used for services that do not support two-factor authentication.

User roles available for each service

One user can have several roles but only one role per service.
For each service, you can define which role will be assigned to a user.

<table>
<thead>
<tr>
<th>Service</th>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td>Company administrator</td>
<td>This role grants full administrator rights for all services. This role grants access to the corporate allowlist. If the Disaster Recovery add-on of the Cyber Protection service is enabled for the company, this role also grants access to the disaster recovery functionality.</td>
</tr>
<tr>
<td>Management Portal</td>
<td>Administrator</td>
<td>This role grants access to the management portal where the administrator can manage users within the entire organization.</td>
</tr>
<tr>
<td></td>
<td>Read-only administrator</td>
<td>This role provides read-only access to all objects in the partner's management portal and the management portal of all this partner's customers. Such users can access data of other users of the organizations in the read-only mode.</td>
</tr>
<tr>
<td></td>
<td>Partner level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Read-only administrator</td>
<td>This role provides read-only access to all objects in the Management Portal of the entire company. Such users can access data of other users of the organization in read-only mode.</td>
</tr>
<tr>
<td></td>
<td>Customer level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Read-only administrator</td>
<td>This role provides read-only access to all objects in the management portal of the company unit and sub-units. Such users can access data of other users of the organization in the read-only mode.</td>
</tr>
<tr>
<td></td>
<td>Unit level</td>
<td></td>
</tr>
<tr>
<td>Vendor Portal</td>
<td>Developer</td>
<td>This role provides full access to the Vendor Portal. Developers can</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>User</td>
<td>This role allows the user to create, manage, request approvals of CyberApp Descriptions.</td>
<td></td>
</tr>
<tr>
<td>Read-only user</td>
<td>This role provides read-only access to the Vendor Portal.</td>
<td></td>
</tr>
</tbody>
</table>
| Cyber Protection                 | **Cyber administrator**  
In addition to the Administrator role rights, this role enables configuring and managing the Cyber Protection service, and approving actions in Cyber Scripting.  
The Cyber administrator role is only available for tenants with enabled Advanced Management pack. |
| Administrator                     | This role enables configuring and managing Cyber Protection for your customers.  
This role is required for configuring and managing the Disaster Recovery functionality and the corporate allowlist.                                                                                                                                                                    |
| Read-only administrator          | The role provides read-only access to all objects of the Cyber Protection service. Such users can access data of other users of the organization in the read-only mode.  
The read-only administrator cannot configure and manage the Disaster Recovery functionality or the corporate allowlist.                                                                                                     |
| Restore operator                 | The role provides access to backups of Microsoft 365 and Google Workspace organizations and allows their recovery, while restricting the access to sensitive content.                                                                                                                                                                |
| File Sync & Share                | **Administrator**  
This role enables configuring and managing File Sync & Share for your users.                                                                                                                                                                                                                                                                |
| Cyber Infrastructure             | **Administrator**  
This role enables configuring and managing Cyber Infrastructure for your users.                                                                                                                                                                                                                                                             |
| Advanced Automation              | There are a number of roles that can be assigned to Advanced Automation users. For more information, see "Advanced Automation roles" (p. 165).                                                                                                                                                                                                 |

One user can have several roles but only one role per service.
For each service, you can define which role will be assigned to a user.

<table>
<thead>
<tr>
<th>Service</th>
<th>Role</th>
<th>Description</th>
</tr>
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</tr>
<tr>
<td></td>
<td>Read-only administrator Partner level</td>
<td>This role provides read-only access to all objects in the partner’s management portal and the management portal of all this partner’s customers. Such users can access data of other users of the organizations in the read-only mode.</td>
</tr>
<tr>
<td></td>
<td>Read-only administrator Customer level</td>
<td>This role provides read-only access to all objects in the Management Portal of the entire company. Such users can access data of other users of the organization in read-only mode.</td>
</tr>
<tr>
<td></td>
<td>Read-only administrator Unit level</td>
<td>This role provides read-only access to all objects in the management portal of the company unit and sub-units. Such users can access data of other users of the organization in the read-only mode.</td>
</tr>
<tr>
<td>Vendor Portal</td>
<td>Developer</td>
<td>This role provides full access to the Vendor Portal. Developers can...</td>
</tr>
<tr>
<td>Role</td>
<td>Rights and Responsibilities</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
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<td>Read-only user</td>
<td>This role provides read-only access to the Vendor Portal.</td>
<td></td>
</tr>
<tr>
<td>Cyber Protection Administrator</td>
<td>In addition to the Administrator role rights, this role enables configuring and managing the Cyber Protection service, and approving actions in Cyber Scripting. The Cyber administrator role is only available for tenants with enabled Advanced Management pack.</td>
<td></td>
</tr>
<tr>
<td>Administrator</td>
<td>This role enables configuring and managing Cyber Protection for your customers. This role is required for configuring and managing the Disaster Recovery functionality and the corporate allowlist.</td>
<td></td>
</tr>
<tr>
<td>Read-only administrator</td>
<td>The role provides read-only access to all objects of the Cyber Protection service. Such users can access data of other users of the organization in the read-only mode. The read-only administrator cannot configure and manage the Disaster Recovery functionality or the corporate allowlist.</td>
<td></td>
</tr>
<tr>
<td>Restore operator</td>
<td>The role provides access to backups of Microsoft 365 and Google Workspace organizations and allows their recovery, while restricting the access to sensitive content.</td>
<td></td>
</tr>
<tr>
<td>File Sync &amp; Share Administrator</td>
<td>This role enables configuring and managing File Sync &amp; Share for your users.</td>
<td></td>
</tr>
<tr>
<td>Cyber Infrastructure        Administrator</td>
<td>This role enables configuring and managing Cyber Infrastructure for your users.</td>
<td></td>
</tr>
<tr>
<td>Advanced Automation</td>
<td>There are a number of roles that can be assigned to Advanced Automation users. For more information, see &quot;Advanced Automation roles&quot; (p. 165).</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

The Vendor portal is available exclusively to technology partners who registered on the Acronis Technology Ecosystem website after October 04, 2023. If you are a vendor looking to build an integration with Acronis and require access to the Vendor portal and a dedicated Sandbox, please follow the instructions.
Read-only administrator role

An account with this role has read-only access to the Cyber Protect console and can do the following:

- Collect diagnostic data, such as system reports.
- See the recovery points of a backup, but cannot drill down into the backup contents and cannot see files, folders, or emails.

A read-only administrator cannot do the following:

- Start or stop any tasks.
  For example, a read-only administrator cannot start a recovery or stop a running backup.
- Access the file system on source or target machines.
  For example, a read-only administrator cannot see files, folders, or emails on a backed-up machine.
- Change any settings.
  For example, a read-only administrator cannot create a protection plan or change any of its settings.
- Create, update, or delete any data.
  For example, a read-only administrator cannot delete backups.

All UI objects that are not accessible for a read-only administrator are hidden, except for the default settings of the protection plan. These settings are shown, but the Save button is not active.

Any changes related to the accounts and roles are shown on the Activities tab with the following details:

- What was changed
- Who did the changes
- Date and time of changes

Restore operator role

This role is available only in the Cyber Protection service and is limited to Microsoft 365 and Google Workspace backups.

A restore operator can do the following:

- View alerts and activities.
- Browse and refresh the list of backups.
- Browse backups without accessing their content. The Restore operator can see the names of the backed-up files and the subjects and senders of the backed-up emails.
- Search backups (full text search is not supported).
- Recover cloud-to-cloud backups to their original location within the original Microsoft 365 or Google Workspace organization.
A restore operator cannot do the following:

- Delete alerts.
- Add or delete Microsoft 365 or Google Workspace organizations.
- Add, delete, or rename backup locations.
- Delete or rename backups.
- Create, delete, or rename folders when recovering a backup to a custom location.
- Apply a backup plan or run a backup.
- Access backed-up files or the content of backed-up emails.
- Download backed-up files or email attachments.
- Send backed-up cloud resources, such as emails or calendar items, as email.
- View or recover Microsoft 365 Teams conversations.
- Recover cloud-to-cloud backups to non-original locations, such as a different mailbox, OneDrive, Google Drive, or Microsoft 365 Team.

**Read-only administrator role**

An account with this role has read-only access to the Cyber Protect console and can do the following:

- Collect diagnostic data, such as system reports.
- See the recovery points of a backup, but cannot drill down into the backup contents and cannot see files, folders, or emails.

A read-only administrator cannot do the following:

- Start or stop any tasks.
  - For example, a read-only administrator cannot start a recovery or stop a running backup.
- Access the file system on source or target machines.
  - For example, a read-only administrator cannot see files, folders, or emails on a backed-up machine.
- Change any settings.
  - For example, a read-only administrator cannot create a protection plan or change any of its settings.
- Create, update, or delete any data.
  - For example, a read-only administrator cannot delete backups.

All UI objects that are not accessible for a read-only administrator are hidden, except for the default settings of the protection plan. These settings are shown, but the **Save** button is not active.

Any changes related to the accounts and roles are shown on the **Activities** tab with the following details:

- What was changed
- Who did the changes
- Date and time of changes
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This role is available only in the Cyber Protection service and is limited to Microsoft 365 and Google Workspace backups.

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- Search backups (full text search is not supported).
- Recover cloud-to-cloud backups to their original location within the original Microsoft 365 or Google Workspace organization.

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- Add or delete Microsoft 365 or Google Workspace organizations.
- Add, delete, or rename backup locations.
- Delete or rename backups.
- Create, delete, or rename folders when recovering a backup to a custom location.
- Apply a backup plan or run a backup.
- Access backed-up files or the content of backed-up emails.
- Download backed-up files or email attachments.
- Send backed-up cloud resources, such as emails or calendar items, as email.
- View or recover Microsoft 365 Teams conversations.
- Recover cloud-to-cloud backups to non-original locations, such as a different mailbox, OneDrive, Google Drive, or Microsoft 365 Team.

**User roles and Cyber Scripting rights**

The available actions with scripts and scripting plans depend on the script status and your user role.

Administrators can manage objects in their own tenant and in its child tenants. They cannot see or access objects on an upper administration level, if any.

Lower-level administrators have only read-only access to the scripting plans applied to their workloads by an upper-level administrator.

The following roles provide rights with regard to Cyber Scripting:

- **Company administrator**
  
  This role grants full administrator rights in all services. With regard to Cyber Scripting, it grants the same rights as the Cyber administrator role.
• Cyber administrator
  This role grants full permissions, including approval of scripts that can be used in the tenant, and the ability to run scripts with the **Testing** status.
  
• Administrator
  This role grants partial permissions, with the ability to run approved scripts as well as create and run scripting plans that use approved scripts.
  
• Read-only administrator
  This role grants limited permissions, with the ability to view scripts and protection plans that are used in the tenant.
  
• User
  This role grants partial permissions, with the ability to run approved scripts as well as create and run scripting plans that use approved scripts, but only on the user’s own machine.

The following table summarizes all available actions, depending on the script status and the user role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Object</th>
<th>Script status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Draft</td>
</tr>
<tr>
<td>Cyber administrator</td>
<td>Scripting plan</td>
<td>Edit (Remove a draft script from a plan)</td>
</tr>
<tr>
<td>Company administrator</td>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Revoke</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Disable</td>
</tr>
<tr>
<td>Administrator</td>
<td></td>
<td>Stop</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrator</td>
<td>Script</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change status</td>
</tr>
<tr>
<td>Administrator</td>
<td>Scripting plan</td>
<td>View</td>
</tr>
</tbody>
</table>
### Changing the notification settings for a user

To change the notifications settings for a user, navigate to **Company Management > Users**. Select the user for which you want to configure the notifications, and then click the pencil icon in the **Settings** section. The following notifications settings are available if the Cyber Protection service is enabled for the tenant where the user is created:

- **Quota overuse notifications** (enabled by default)
  Notifications about exceeded quotas.
- **Scheduled usage reports** (enabled by default)
  Usage reports that are sent on the first day of each month.
- **URL branding notifications** (disabled by default)
  Notifications about the upcoming expiration of the certificate used for the custom URL for the Cyber Protect Cloud services. The notifications are sent to all administrators of the selected tenant - 30 days, 15 days, 7 days, 3 days, and 1 day prior the expiration of the certificate.
- **Failure notifications, Warning notifications, and Success notifications** (disabled by default)
  Notifications about the execution results of protection plans and the results of disaster recovery operations for each device.
- **Daily recap about active alerts** (enabled by default)
  The daily recap is generated based on the list of active alerts that are present in the Cyber Protect console at the moment when the recap is generated. The recap is generated and sent once a day,
between 10:00 and 23:59 UTC. The time when the report is generated and sent depends on the workload in the data center. If there are no active alerts at that time, the recap is not sent. The recap does not include information for past alerts that are no longer active. For example, if a user finds a failed backup and clears the alert, or the backup is retried and succeeds before the recap is generated, the alert will no longer be present and the recap will not include it.

- **Device control notifications** (disabled by default)
  Notifications about attempts to use peripheral devices and ports that are restricted by protection plans with the device control module enabled.

- **Recovery notifications** (disabled by default)
  Notifications about recovery actions on the following resources: user email messages and entire mailbox, public folders, OneDrive / GoogleDrive: entire OneDrive and files or folders, SharePoint files, Teams: Channels, entire Team, email messages, and Team site.
  In the context of these notifications, the following actions are considered recovery actions: send as email, download, or start a recovery operation.

- **Data loss prevention notifications** (disabled by default)
  Notifications about data loss prevention alerts related to the activity of this user on the network.

- **Security incident notifications** (disabled by default)
  Notifications about detected malware during on-access, on-execution, and on-demand scans, and about detections from the behavioral engine and the URL filtering engine.
  There are two options available: Mitigated and Not mitigated. These options are relevant for Endpoint Detection and Response (EDR) incident alerts, EDR alerts from threat feeds, and individual alerts (for workloads that do not have EDR enabled on them).
  When an EDR alert is created, an email is sent to the relevant user. If the threat status of the incident changes, a new email is sent. The emails include action buttons that enable the user to see details of the incident (if it was mitigated), or to investigate and remediate the incident (if it was not mitigated).

- **Infrastructure notifications** (disabled by default)
  Notifications about issues with the Disaster Recovery infrastructure: when the Disaster Recovery infrastructure is unavailable, or the VPN tunnels are unavailable.

All notifications are sent to the user's email address.

**Notifications received by user role**

The notifications that Cyber Protection sends depend on the user role.

<table>
<thead>
<tr>
<th>Notification type\User role</th>
<th>User</th>
<th>Customer and unit administrators</th>
<th>Partner and folder administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notifications for own devices</td>
<td>Yes</td>
<td>Yes</td>
<td>n/a*</td>
</tr>
<tr>
<td>Notifications for all devices of the child tenants</td>
<td>n/a</td>
<td>Yes (except Security incident notifications)</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Notifications for Microsoft 365, Google Workspace, and other cloud-based backups

<table>
<thead>
<tr>
<th>n/a</th>
<th>Yes</th>
<th>Yes</th>
</tr>
</thead>
</table>

* Partner administrators cannot register own devices, but can create their own customer administrator accounts and use those accounts to add own devices. See User accounts and tenants.

Disabling and enabling a user account

You may need to disable a user account in order to temporarily restrict its access to the cloud platform.

To disable a user account

1. In the management portal, go to Users.
2. Select the user account that you want to disable, and then click the ellipsis icon > Disable.
3. Confirm your action by clicking Disable.

As a result, this user will not be able to use the cloud platform or to receive any notifications.

To enable a disabled user account, select it in the users list, and then click the ellipsis icon > Enable.

Deleting a user account

You may need to delete a user account permanently in order to free up the resources it uses — such as storage space or license. The usage statistics will be updated within a day after deletion. For accounts with a lot of data, it might take longer.

Before deleting a user account, you have to disable it. For more information on how to do this, refer to Disabling and enabling a user account.

To delete a user account

1. In the management portal, go to Users.
2. Select the disabled user account, and then click the ellipsis icon > Delete.
3. To confirm your action, enter your login, and then click Delete.

As a result:

- All notifications configured for this account will be disabled.
- All data that belongs to this user account will be deleted.
- The administrator will not be able to access the management portal.
- All backups of workloads associated with this user will be deleted.
- All machines associated with this user account will be unregistered.
- All protection plans will be revoked from all workloads associated with this user.
- All File Sync & Share data that belongs to this user (for example, files and folders) will be deleted.
Notary data that belongs to this user (for example, notarized files, eSigned files) will be deleted. You will see the user Status as Deleted. When you hover over the Deleted status, you will see the date when the user was deleted and the note that you can still recover all relevant user data and settings within 30 days of this deletion date.

Recovering a user account
A user account can be deleted accidentally, so Cyber Protection offers an opportunity to recover user accounts.

You might need to recover a user account for example in the following case: the company administrator has deleted a user who has left the company, but you still need all the resources registered under that user.

To recover a user account
1. In the management portal, go to Company Management > Users.
2. On the Users tab, find the user account that you want to recover. Its status is displayed as Deleted.
3. Hover over the user account, and then click the ellipsis icon.
4. Click Recover.
   You will see a confirmation window saying that the user account will be recovered in the same state it was before being deleted, and it will be disabled by default.
5. [Optional] If you need to enable the user account, select the check box I want to enable the user. You can enable the user account at any time later.
6. Click Recover.

As a result:
- This user account will be recovered.
- All data that belongs to this user account will be recovered.
- All machines associated with this user account will be re-registered.
- You will see the user status as Active, if you have enabled the user account, or as Disabled, if you have not enabled the user account yet.

Transferring ownership of a user account
You may need to transfer the ownership of a user account if you want to keep the access to a restricted user's data.

Important
You cannot reassign the content of a deleted account.

To transfer the ownership of a user account:
1. In the management portal, go to Users.
2. Select the user account whose ownership you want to transfer, and then click the pencil icon in the General information section.
3. Replace the existing email with the email of the future account owner, and then click Done.
4. Confirm your action by clicking Yes.
5. Let the future account owner verify their email address by following the instructions sent there.
6. Select the user account whose ownership you are transferring, and then click the ellipsis icon > Reset password.
7. Confirm your action by clicking Reset.
8. Let the future account owner reset the password by following the instructions sent to their email address.

The new owner can now access this account.

Setting up two-factor authentication

Two-factor authentication (2FA) is a type of multi-factor authentication that checks a user identity by using a combination of two different factors:

- Something that a user knows (PIN or password)
- Something that a user has (token)
- Something that a user is (biometrics)

Two-factor authentication provides extra protection from unauthorized access to your account.

The platform supports Time-based One-Time Password (TOTP) authentication. If the TOTP authentication is enabled in the system, users must enter their traditional password and the one-time TOTP code in order to access the system. In other words, a user provides the password (the first factor) and the TOTP code (the second factor). The TOTP code is generated in the authentication application on a user second-factor device on the basis of the current time and the secret (QR-code or alphanumeric code) provided by the platform.

How it works

1. You enable two-factor authentication on your organization level.
2. All of your organization users must install an authentication application on their second-factor devices (mobile phones, laptops, desktops, or tablets). This application will be used for generating one-time TOTP codes. The recommended authenticators:
   - Google Authenticator
     iOS app version (https://apps.apple.com/app/google-authenticator/id388497605)
   - Microsoft Authenticator
Important
Users must ensure that the time on the device where the authentication application is installed is set correctly and reflects the actual current time.

3. Your organization users must re-log in to the system.
4. After entering their login and password, they will be prompted to set up two-factor authentication for their user account.
5. They must scan the QR code by using their authentication application. If the QR code cannot be scanned, they can use the 32-digit code shown below the QR code and add it manually in the authentication application.

Important
It is highly recommended to save it (print the QR-code, write down the temporary one-time password (TOTP) secret, use the application that supports backing up codes in a cloud). You will need the temporary one-time password (TOTP) to reset two-factor authentication in case of lost second-factor device.

6. The temporary one-time password (TOTP) code will be generated in the authentication application. It is automatically regenerated every 30 seconds.
7. The users must enter the TOTP code on the Set up two-factor authentication window after entering their password.
8. As a result, two-factor authentication for the users will be set up.

Now when users log in to the system, they will be asked to provide the login and password, and the one-time TOTP code generated in the authentication application. Users can mark the browser as trusted when they log in to the system, then the TOTP code will not be requested on subsequent logins via this browser.

To restore two-factor authentication on a new device

If you have access to the previously set-up mobile authentication app:
1. Install an authenticator app on your new device.
2. Use the PDF file that you saved when you set up 2FA on your device. This file contains the 32-digit code that has to be entered in the authenticator app to link the authenticator app again to your Acronis account.

Important
If the code is correct but it is not working, make sure to sync the time in the authenticator mobile app.

3. If you missed saving the PDF file during the setup:
a. Click **Reset 2FA** and enter the one-time password shown in the previously set-up mobile authenticator app.

b. Follow the on-screen instructions.

If you have no access to previously set-up mobile authenticator app:

1. Take a new mobile device.
2. Use the stored PDF file to link a new device (default name of the file is `cyberprotect-2fa-backupcode.pdf`).
3. Restore access to your account from backup. Ensure that backups are supported by your mobile app.
4. Open the app under the same account from another mobile device if it is supported by the app.

### Two-factor setup propagation across tenant levels

Two-factor authentication is set up on the **organization** level. You can enable or disable two-factor authentication:

- For your own organization.
- For your child tenant (only in case the **Support access** option is enabled within that child tenant).

The two-factor authentication settings are propagated across tenant levels as follows:

- Folders auto-inherit the two-factor authentication settings from their partner organization. On the scheme below, the red lines mean that the propagation of two-factor authentication settings is not possible.
Units auto-inherit the two-factor authentication settings from their customer organization.

* 2FA setting propagation from a partner level

* 2FA setting propagation from a customer level
Note
1. You can enable or disable two-factor authentication for your child organizations only in case the Support access option is enabled within that child organization.
2. You can manage the two-factor authentication settings for users of the child organizations only in case the Support access option is enabled within that child organization.
3. It is not possible to set up two-factor authentication on the folder or unit level.
4. You can configure the two-factor authentication setting even if your parent organization does not have this setting enabled.

Setting up two-factor authentication for your tenant
As an administrator, you can enable two-factor authentication for your organization.

To enable two-factor authentication for your tenant
1. In the management portal, go to Settings > Security.
2. Slide the Two-factor authentication toggle, and then click Enable.

Now, all users in the organization must set up two-factor authentication for their accounts. They will be prompted to do this the next time they try to sign in or when their current sessions expire.

The progress bar under the toggle shows how many users have set up two-factor authentication for their accounts. To check which users have configured their accounts, navigate to Company Management > Users tab and check the 2FA status column. The 2FA status of users who have not yet configured two-factor authentication for their accounts is Setup Required.

After the successful configuration of two-factor authentication, users will have to enter their login, password, and a TOTP code each time they log in to the service console.

To disable two-factor authentication for your tenant
1. In the management portal, go to Settings > Security.
2. To disable two-factor authentication, turn off the toggle, and then click Disable.
3. [If at least one user configured two-factor authentication within the organization] Enter the TOTP code generated in your authentication application on the mobile device.

As a result, two-factor authentication is disabled for your organization, all secrets are deleted, and all trusted browsers are forgotten. All users will log in to the system by using only their login and password. On the Company Management > Users tab, the 2FA status column will be hidden.

Managing two-factor authentication for users
You can monitor two-factor authentication settings for all your users and reset the settings in the management portal, under Company Management > Users tab.
Monitoring

In the management portal, under Company Management > Users, you can see a list of all users in your organization. The 2FA status indicates if the two-factor configuration is set up for a user.

To reset the two-factor authentication for a user
1. In the management portal, go to Company Management > Users.
2. On the Users tab, find a user for whom you want to change the settings, and then click the ellipsis icon.
3. Click Reset two-factor authentication.
4. Enter the TOTP code generated in the authentication application on your second-factor device and click Reset.

As a result, the user will be able to set up two-factor authentication again.

To reset the trusted browsers for a user
1. In the management portal, go to Company Management > Users.
2. On the Users tab, find a user for whom you want to change the settings, and then click the ellipsis icon.
3. Click Reset all trusted browsers.
4. Enter the TOTP code generated in the authentication application on your second-factor device, and then click Reset.

The user for whom you have reset all trusted browsers will have to provide the TOTP code on the next login.

Users can reset all trusted browsers and reset two-factor authentication settings by themselves. This can be done when they log in to the system, by clicking the respective link and entering the TOTP code to confirm the operation.

To disable two-factor authentication for a user

We do not recommend disabling the two-factor authentication because this creates potential for breaches in the tenant security.

As an exception, you can disable the two-factor authentication for a user and keep the two-factor authentication for all other users of the tenant. This is a workaround for cases when two-factor authentication is enabled within a tenant where a cloud integration is configured, and this integration authorizes to the platform via the user account (login password). In order to continue using the integration, as a temporary solution, the user can be converted into a service account for which two-factor authentication is not applicable.
Important
Switching regular users to service users in order to disable two-factor authentication is not recommended because it poses risks to the tenant security.

The recommended secure solution for using cloud integrations without disabling the two-factor authentication for tenants is to create API clients and configure your cloud integrations to work with them.

1. In the management portal, go to Company Management > Users.
2. On the Users tab, find a user for whom you want to change the settings, and then click the ellipsis icon.
3. Click Mark as service account. As a result, a user gets a special two-factor authentication status called Service account.
4. [If at least one user within a tenant has configured two-factor authentication] Enter the TOTP code generated in the authentication application on your second-factor device to confirm disabling.

To enable two-factor authentication for a user
You may need to enable two-factor authentication for a particular user for whom you have disabled it previously.

1. In the management portal, go to Company Management > Users.
2. On the Users tab, find a user for whom you want to change the settings, and then click the ellipsis icon.
3. Click Mark as regular account. As a result, a user will have to set up two-factor authentication or provide the TOTP code when entering the system.

Resetting two-factor authentication in case of lost second-factor device
To reset access to your account in case of lost second-factor device, follow one of the suggested approaches:

- Restore your TOTP secret (QR-code or alphanumeric code) from a backup.
  Use another second-factor device and add the saved TOTP secret in the authentication application installed on this device.
- Ask your administrator to reset the two-factor authentication settings for you.

Brute-force protection
A brute-force attack is an attack when an intruder tries to get access to the system by submitting many passwords, with the hope of guessing one correctly.

The brute-force protection mechanism of the platform is based on device cookies.
The settings for brute-force protection that are used in the platform are pre-defined:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Entering the password</th>
<th>Entering the TOTP code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attempt limit</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Attempt limit period (the limit is reset after timeout)</td>
<td>15 min (900 sec)</td>
<td>15 min (900 sec)</td>
</tr>
<tr>
<td>Lockout happens on</td>
<td>Attempt limit + 1 (11th attempt)</td>
<td>Attempt limit</td>
</tr>
<tr>
<td>Lockout period</td>
<td>5 min (300 sec)</td>
<td>5 min (300 sec)</td>
</tr>
</tbody>
</table>

If you have enabled two-factor authentication, a device cookie is issued to a client (browser) only after successful authentication using both factors (password and TOTP code).

For trusted browsers, the device cookie is issued after successful authentication using only one factor (password).

The TOTP code entering attempts are registered per user, not per device. This means that even if a user attempts to enter the TOTP code by using different devices, they will still be blocked out.

### Configuring upsell scenarios for your customers

Upselling is a technique to invite your customers to buy additional features.

Cyber Protection has several legacy editions, all of which differ in functionality and price. You may want to promote more expensive editions with more advanced capabilities for your existing customers who are using basic editions.

You can enable or disable the upsell capability per customer. By default, the upsell option is disabled. If you enable the upsell for a customer, they will then see additional functionality that is not available until the customer purchases the promoted edition. This additional functionality is marked with labels that show the name or icons of the promoted edition, all highlighted in orange. These upsell points will be shown to a customer, to motivate them to buy a more expensive edition. When clicking on these upsell points, a customer will see a dialog suggesting they purchase a more expensive edition, to enable the desired functionality.

The action item depends on the type of a customer user. The type of users (buyer or not buyer) can be configure by using the platform API, for details refer to the API documentation. For more information about action items, shown to your customers, refer to the table below:

<table>
<thead>
<tr>
<th>Type of users in customer tenant</th>
<th>Action item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator; buyer</td>
<td>The <strong>Buy now</strong> button is shown in the user interface.*</td>
</tr>
<tr>
<td>Administrator; not buyer</td>
<td>The message &quot;Contact your partner to upgrade the edition&quot; is shown in</td>
</tr>
</tbody>
</table>
User; buyer
The message “Contact your partner to upgrade the edition” is shown in the user interface.

User; not buyer
The message “Contact your partner to upgrade the edition” is shown in the user interface.

* The link for the Buy now button, which will redirect a customer to a website to purchase a more advanced edition, can be configured in Settings > Branding. In the Upsell section, you can specify Buy URL. The branding settings will be applied to all direct and indirect child partners/folders and customers of the tenant where the branding is configured.

To enable or disable the upsell capability for a customer

1. In the management portal, go to Clients.
2. Select the customer, go to the right pane, and then click the Configure tab.
3. In the Upsell section, do the following:
   - Enable Promote more advanced editions, to turn on the upsell scenario for customers.
   - Disable Promote more advanced editions, to turn off the upsell scenario for customers.

Upsell points shown to a customer

Vulnerability list

In the Cyber Protect console, the vulnerability list can be found in Software management > Vulnerabilities. When a user clicks on the stitch icon, the edition promotion dialog will be opened to prompt the user to buy the more expensive edition.

Creating or editing a protection plan

In the Cyber Protect console, this can be found in Plans > Protection. Click Create plan. Cyber Backup editions have only the Backup and Vulnerability modules enabled; the rest of the modules are available only in the Cyber Protect editions. Your customer will be able to get all the modules enabled after buying one of the Cyber Protect editions.

Autodiscovery wizard

In the Cyber Protect console, this wizard can be found in Devices > All devices. Your customer should launch the autodiscovery wizard by clicking Add, and then going to the Multiple devices section, and then clicking Windows only. The automatic machine discovery methods will be available only in the Advanced editions.

Actions in the Device list

In the Cyber Protect console, this list can be found in Devices > All devices. Your customer should select the machine and then two additional options will be shown in the left pane:
• Connect via HTML5 client
• Patch

These options will be available only if a customer buys a more expensive edition than the existing one.

Managing locations and storage

The Settings > Locations section shows the cloud storages and disaster recovery infrastructures that you can use to provide the Cyber Protection and the File Sync & Share services to your partners and customers.

Storages configured for other services will be shown on the Locations section in the future releases.

Locations

A location is a container that enables you to conveniently group the cloud storages and disaster recovery infrastructures. It can represent anything of your choice, like a specific data center or a geographical location of your infrastructure components.

You can create any number of locations and populate them with backup storages, disaster recovery infrastructures, and File Sync & Share storages. A location can contain multiple cloud storages but only one disaster recovery infrastructure.

For information about operations with storages, refer to “Managing storage”.

Choosing locations and storages for partners and customers

When creating a partner/folder tenant, you can select multiple locations and multiple storages per service within them that will be available in the new tenant.

When creating a customer tenant, you must select one location, and then select one storage per service within this location. The storages assigned to the customer can be changed later, but only if their usage is 0 GB – that is, either before the customer starts using the storage or after the customer removes all the backups from this storage.

The information about the storages that are assigned to a customer tenant is shown on the tenant details panel when the tenant is selected on the Clients tab. The information about the storage space usage is not updated in real time. Please allow up to 24 hours for the information to be updated.

For information on geo-redundancy, see "Geo-redundant storage" (p. 81).

Operations with locations

To create a new location, click Add location, and then specify the location name.
To move a storage or a disaster recovery infrastructure to another location, select the storage or the infrastructure, click the pencil icon in the **Location** field, and then select the target location.

To rename a location, click the ellipsis icon next to the location name, click **Rename**, and then specify the new location name.

To delete a location, click the ellipsis icon next to the location name, click **Delete**, and then confirm your decision. Only empty locations can be deleted.

**Managing storage**

**Adding new storages**

- **Cyber Protection** service:
  - By default, the backup storages are located in data centers.
  - If the **Partner-owned backup storage** offering item is enabled for a partner tenant by an upper-level administrator, the partner administrators can organize the storage in the partner's own data center, by using the Cyber Infrastructure software. Click **Add backup storage** on the **Locations** section to find information about organizing a backup storage in your own data center.
  - If the **Partner-owned disaster recovery infrastructure** offering item is enabled for a partner tenant by an upper-level administrator, the partner administrators can organize a disaster recovery infrastructure in the partner's own data center. For information about adding a disaster recovery infrastructure, contact the technical support.

**Note**
Backup validation is not possible with public cloud object storages, such as Amazon S3, Microsoft Azure, Google Cloud Storage, and Wasabi, used by the data centers.
Backup validation is possible with public cloud object storages used by partners. However, enabling it is not recommended because the validation operations increase the egress traffic from these public object storages and may lead to significant expenses.

- For information about adding storages that will be used by other services, contact the technical support.

**Deleting storages**

You can delete storages that were added by you or your child tenants.

If the storage is assigned to any customer tenants, you must disable the service that uses the storage for all customer tenants, before deleting the storage.

**To delete a storage**

1. Log in to the management portal.
2. **Navigate to the tenant** in which the storage was added.
3. Click **Settings > Locations**.
4. Select the storage that you want to delete.
5. On the storage properties panel, click the ellipsis icon, and then click **Delete storage**.
6. Confirm your decision.

**Immutable storage**

With immutable storage, you can access deleted backups during a specified retention period. You can recover content from these backups, but you cannot change, move, or delete them. When the retention period ends, the deleted backups are permanently deleted.

The immutable storage contains the following backups:

- Backups that are deleted manually.
- Backups that are deleted automatically, according to the settings in the **How long to keep** section in a protection plan or the **Retention rules** section in a cleanup plan.

These backups still use storage space and are charged accordingly.

You can configure immutable storage on the partner level and on the customer level.

---

**Important**

These levels are not interdependent. Customer administrators can enable immutable storage for their tenants even though immutable storage is not enabled in the parent partner tenant. Only when no custom settings are applied to a child tenant, the child tenant inherits the settings of the parent tenant.

Configuring the immutable storage settings requires two-factor authentication in the tenant to which the administrator account belongs.

**Immutable storage modes**

For partner tenants, there is no selection of immutable storage modes. An administrator can disable and re-enable immutable storage, and change its mode and retention period.

For customer tenants, immutable storage is available in the following modes:

- **Governance mode**
  
  In this mode, an administrator can disable and re-enable immutable storage, and change its mode and retention period.

- **Compliance mode**
  
  After this mode is selected, immutable storage cannot be disabled, and its mode or retention period cannot be changed anymore.

---

**Note**

Starting with the 21.12 release, immutable storage with a retention period of 14 days is enabled by default for new partner tenants. For existing tenants, you need to enable immutable storage manually.
Limitations

- Immutable storage is available for Acronis-hosted and partner-hosted storages that use Acronis Cyber Infrastructure version 4.7.1 or later.

Immutable storage requires that TCP port 40440 is open for the Backup Gateway service in Acronis Cyber Infrastructure. In version 4.7.1 and later, TCP port 40440 is automatically opened with the **Backup (ABGW) public** traffic type. For more information about the traffic types, refer to the Acronis Cyber Infrastructure documentation.

- Immutable storage requires a protection agent version 21.12 (build 15.0.28532) or later.

- Only TIBX (Version 12) backups are supported.

Enabling and disabling immutable storage

Configuring the immutable storage settings requires two-factor authentication in the tenant to which the administrator account belongs.

**To enable immutable storage**

**In a partner tenant**

1. Log in to the management portal as an administrator, and then go to **Settings > Security**.
2. Enable the **Immutable storage** switch.
3. Specify a retention period within the range of 14 to 3650 days.
   - The default retention period is 14 days. A longer retention period will result in increased storage usage.
4. Click **Save**.

**In a customer tenant**

1. Log in to the management portal as an administrator, and then go to **Clients**.
2. To edit the settings for a customer tenant, click its name.
3. In the navigation menu, go to **Settings > Security**.
4. Enable the **Immutable storage** switch.
5. Specify a retention period within the range of 14 to 3650 days.
   - The default retention period is 14 days. A longer retention period will result in increased storage usage.
6. Select the immutable storage mode, and then confirm your choice if prompted.
7. Click **Save**.

**Warning!**

Selecting **Compliance mode** is irreversible. After you select this mode, you will not be allowed to disable the immutable storage, or change its mode or retention period.

8. To make an existing archive support the immutable storage, create a new backup in that archive. To create a new backup, run the protection plan manually or on a schedule.
Warning!
If you delete a backup before making the archive support the immutable storage, the backup is deleted permanently.

To disable immutable storage

In a partner tenant
1. Log in to the management portal as an administrator, and then go to Settings > Security.
2. Disable the Immutable storage switch.

Important
This change will be inherited by all child tenants that do not use custom settings for immutable storage.

Warning!
Disabling the immutable storage does not come into effect immediately. During a grace period of 14 days, the immutable storage is still active and you can access the deleted backups according to their original retention period. When the grace period ends, all backups in the immutable storage are permanently deleted.

3. Confirm your choice by clicking Disable.

In a customer tenant
1. Log in to the management portal as an administrator, and then go to Clients.
2. To edit the settings for a customer tenant, click its name.
3. In the navigation menu, go to Settings > Security.
4. Disable the Immutable storage switch.

Note
You can disable immutable storage only in the Governance mode.

Warning!
Disabling the immutable storage does not come into effect immediately. During a grace period of 14 days, the immutable storage is still active and you can access the deleted backups according to their original retention period. When the grace period ends, all backups in the immutable storage are permanently deleted.

5. Confirm your choice by clicking Disable.

Billing example for immutable storage
The example below shows a deleted backup that goes to the immutable storage for 14 days, which is the default retention period. During this period, the deleted backup uses storage space. When the
retention period ends, the deleted backup is permanently deleted and storage usage decreases. Every month, the storage usage is charged accordingly.

<table>
<thead>
<tr>
<th>Date</th>
<th>Backups</th>
<th>Storage usage</th>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>April, 1</td>
<td>Backup A (10 GB) is created</td>
<td>10 GB + 1 GB = 11 GB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Backup B (1 GB) is created</td>
<td></td>
<td></td>
</tr>
<tr>
<td>April, 20</td>
<td>Backup B is deleted, goes to Immutable storage (with retention period of 14 days)</td>
<td>10 GB + 1 GB = 11 GB</td>
<td></td>
</tr>
<tr>
<td>April, 30</td>
<td>Backup B is permanently deleted because the retention period ended</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May, 4</td>
<td>Backup B is permanently deleted because the retention period ended</td>
<td>11 GB - 1 GB = 10 GB</td>
<td></td>
</tr>
<tr>
<td>May, 31</td>
<td></td>
<td></td>
<td>Billed 10 GB for May</td>
</tr>
</tbody>
</table>

**Geo-redundant storage**

Geo-redundant storage ensures data durability by asynchronously copying it to a secondary location that is geographically distant to the primary location. With geo-redundancy, your data is accessible even if the primary location is unavailable.

**Enabling and disabling geo-redundant storage**

**Prerequisites**

- Ensure that the geo-redundant storage is available for your cloud infrastructure.
- Only administrators can enable or disable the geo-redundant storage. Ensure you have the administrator rights.

**To enable geo-redundant storage for existing tenants**

1. In the Management portal, go to **Clients**.
2. Navigate to the tenant for which you want to enable geo-redundancy.

**Note**

For enabling geo-redundancy for multiple tenants, see "Enabling services for multiple existing tenants" (p. 41).

3. Click **Edit** to change the settings.
4. Under **Cloud resources**, select the **Geo-redundancy** check box under the required storage name.
5. Click **Save**.
Geo-redundancy is enabled for the tenant. Customer administrators can disable the geo-redundancy in the Cyber Protect console.

To disable geo-redundant storage for existing tenants

1. In the Management portal, go to Clients.
2. Navigate to the tenant for which you want to disable geo-redundancy.
3. Click Edit to change the settings.
4. Under Cloud resources, clear the Geo-redundancy check box under the required storage name.
5. Click Save.

**Warning!**
The geo-redundancy is disabled. The replicated data will be deleted within one day.

Limitations

- Currently, secondary locations for replicated data are only available in the United States and Canada.
- For information about the Disaster Recovery service limitations when using geo-redundancy, see the Disaster Recovery documentation.

Configuring branding and white labeling

The Settings > Branding section enables partner administrators to customize the user interface of the management portal and the Cyber Protection service to remove any association with the higher-level partners.
Branding can be configured on the partner and the folder levels. The branding is applied to all direct and indirect child partners/folders and customers of the tenant where the branding is configured.

Other services provide separate branding capabilities in their service consoles. For more information, refer to the user guides of the corresponding services.

**Branding items**

**Appearance**

- **Service name.** This name is used in all email messages that are sent by the management portal and Cloud services (account activation messages, service notification email messages), on the Welcome screen after the first login, and as the management portal browser tab name.
- **Web console logo.** The logo is displayed in the management portal and the services. Click Upload to upload an image file.
- **Favourite Icon** [Available only if a custom URL is configured]. The favicon is displayed next to the page title in the browser tab. Click Upload to upload an image file.
- **Color scheme.** The color scheme defines the combination of colors that is used for all user interface elements.
Note
Click Preview scheme in a new tab to preview what the interface will look like to your child tenants. The branding will not be applied until you click Done on the Choose color scheme panel.

Agent and installer branding
You can customize the branding of agent installation files and tray monitor for Windows and macOS.

Note
To enable this branding functionality, you must update the Cyber Protection agents to version 15.0.28816 (Release 22.01) or later.

- **Agent installer filename.** The name of the installation file that is downloaded on protected workloads.
- **Agent installer logo.** The logo that is displayed in the Setup wizard during agent installation. Click Upload to upload an image file.
- **Agent name.** The name that is displayed in the Setup wizard during agent installation.
- **Tray monitor name.** The name that is displayed on top of the tray monitor window.

Documentation and support

- **Home URL.** This page is opened when a user clicks the company name on the About panel.
- **Support URL.** This page is opened when a user clicks the Contact support link on the About panel or in an email message that is sent by the management portal.
- **Support phone.** This phone number is shown on the About panel.
- **Knowledge base URL.** This page is opened when a user clicks the Knowledge base link in an error message.
- **Management Portal administrator’s guide.** This page is opened when a user clicks the question mark icon in the upper-right corner of the management portal user interface, and then clicks About > Administrator guide.
- **Management Portal administrator’s help.** This page is opened when a user clicks the question mark icon in the upper-right corner of the management portal user interface, and then clicks Help.

URL for Cyber Protect Cloud services
You can make Cyber Protect Cloud services available from your custom domain. Click Configure to set a custom URL for the first time, or click Reconfigure to change the existing one. To use the default URL (https://cloud.acronis.com), click Reset to default. For more information about custom URLs, refer to "Configuring custom web interface URLs".
Legal documents settings

- **End-user License agreement (EULA) URL.** This page is opened when a user clicks the End-user license agreement link on the About panel, on the Welcome screen after the first login, and on File Sync & Share Upload Request landing pages.
- **Platform terms URL.** This page is opened when a partner administrator clicks the Platform terms link on the About panel or the Welcome screen after the first login.
- **Privacy statement URL.** This page is opened when a user clicks the Privacy statement link on the Welcome screen after the first login, and on File Sync & Share Upload Request landing pages.

**Important**

If you do not want a document to appear on the Welcome screen, do not enter a URL for that document.

**Note**

For more information about File Sync & Share Upload Requests, see the Cyber Files Cloud User's Guide.

Upsell

- **Buy URL.** This page is opened when a user clicks **Buy now** to upgrade to a more advanced edition of the Cyber Protection service. For more information about upsell scenarios, refer to "Configuring upsell scenarios for your customers".

Mobile apps

- **App Store.** This page is opened when the user clicks Add > iOS in the Cyber Protection service.
- **Google Play.** This page is opened when the user clicks Add > Android in the Cyber Protection service.

Email server settings

You can specify a custom email server that will be used to send email notifications from the management portal and the services. To specify a custom email server, click **Customize**, and then specify the following settings:

- In **From**, enter the name that will be shown in the From field of the email notifications.
- In **SMTP**, enter the name of the outgoing mail server (SMTP).
- In **Port**, enter the port of the outgoing mail server. By default, the port is set to 25.
- In **Encryption**, select whether to use SSL or TLS encryption. Select **None** to disable encryption.
- In **User name** and **Password**, specify the credentials of an account that will be used to send messages.
Configuring branding
1. Log in to the management portal.
2. Navigate to the tenant in which you want to configure branding.
3. Click Settings > Branding.
4. [If branding has not been enabled yet] Click Enable branding.
5. Configure the branding items described above.

Restoring the default branding settings
You can reset all branding items to their default values.
1. Log in to the management portal.
2. Navigate to the tenant in which you want to reset the branding.
3. Click Settings > Branding.
4. In the upper right, click Restore to defaults.

Disabling the branding
You can disable the branding for your account and all child tenants.
1. Log in to the management portal.
2. Navigate to the tenant in which you want to disable the branding.
3. Click Settings > Branding.
4. In the upper right, click Disable branding.

White labeling
You can control if the Cyber Protection agent (for Windows, macOS, and Linux), Cyber Protection Monitor (for Windows, macOS, and Linux), and Connect Client will be branded or white-labeled for all your child partners and customers. If you enable white labeling, the agent, Connect Client, and tray monitor will be white-labeled. This setting will also affect the names and logos used in the installer and the Cyber Protection Monitor.

Applying white labeling
1. Log in to the management portal.
2. Navigate to the tenant in which you want to apply white labeling.
3. Click Settings > Branding.
4. In the upper end of the window, click White label to clear all branding items, except for Service name, End-user License agreement (EULA) URL, Management portal administrator’s guide, Management portal administrator’s help, and Email server settings.
Configuring custom web interface URLs

**Note**
A customized URL will point to a different IP address compared to the default URL. Keep it in mind when configuring firewall policies.

**To configure the web interface URL for Cyber Protect Cloud services**

1. In the management portal, click **Settings > Branding**.
2. In the **URL for Cyber Protect Cloud services** section:
   - Click **Configure** to set a custom URL for the first time.
   - Click **Reconfigure** to change the existing custom URL.
3. On the **Domain Settings** step, prepare your domain and CNAME record.
   - To use a custom URL, you must have an active domain name and a CNAME record that is configured to point to the data center where your account is. The configuration of the CNAME record is done by your DNS registrar and might take up to 48 hours to propagate.
   - To locate the domain name of your data center and request the configuration of your CNAME record, refer to article **Branding Web Console URL (58275)**.
4. On the **Check Your URL** step, verify that your custom URL is accessible, and that your CNAME record is configured correctly. To do that, enter the main URL name and click **Check**. If you use a wildcard SSL certificate, you can add up to ten alternative domain names. If you use a "Let's Encrypt" certificate, alternative domain names will be ignored.
5. On the **SSL Certificate** step, you can do one of the following:
   - Create a "Let's Encrypt" certificate. To do this, click **Free SSL certificate with "Let's Encrypt"**. This option uses "Let's Encrypt" certificates issued by a third-party entity. The service provider is not liable for any issues resulting from the use of these free certificates. For more information about the "Let's Encrypt" terms, refer to [https://letsencrypt.org/repository/](https://letsencrypt.org/repository/).
   - Upload your wildcard certificate. To do this, click **Upload wildcard certificate**, and then provide a wildcard certificate and a private key.

**Note**
A certificate validation error might occur with the error message: "Failed to verify the certificate: x509: certificate signed by unknown authority". Usually it means that some intermediate certificates are missing. Use a certificate chain resolver to fix the structure of your certificate and upload the full certificate chain.

6. Click **Submit** to apply the changes.

**To reset the custom URL to default**

1. In the management portal, click **Settings > Branding**.
2. In the **URL for Acronis Cyber Protect Cloud services** section, click **Reset to default** to use the default URL ([https://cloud.acronis.com](https://cloud.acronis.com)).
Monitoring

To access information about services usage and operations, click Monitoring.

Usage

The Usage tab provides an overview of the service usage and enables you to access the services within the tenant in which you are operating.

The usage data includes both standard features and advanced features.

To refresh the usage data displayed on the tab, click the ellipsis in the upper right of the screen and select Refresh usage.

Note

Fetching the data may take up to 10 minutes. Reload the page to view the updated data.

Operations

The Operations dashboard provides a number of customizable widgets that give an overview of operations related to the Cyber Protection service. Widgets for other services will be available in future releases.

By default, the data is displayed for the tenant in which you are operating. You can change the displayed tenant individually for each widget by editing it. Aggregated information about the direct child customer tenants of the selected tenant is also shown, including those that are located in folders. The dashboard does not display information about child partners and their child tenants; you must drill-down into the specific partner to see its dashboard. However, if you convert a child partner tenant to a folder tenant, the information about this tenant’s child customers will appear on the parent tenant’s dashboard.
The widgets are updated every two minutes. The widgets have clickable elements that enable you to investigate and troubleshoot issues. You can download the current state of the dashboard in the .pdf or .xlsx format, or send it via email to any address, including external recipients.

You can choose from a variety of widgets, presented as tables, pie charts, bar charts, lists, and tree maps. You can add multiple widgets of the same type for different tenants or with different filters.

**To rearrange the widgets on the dashboard**

Drag and drop the widgets by clicking on their names.

**To edit a widget**

Click the pencil icon next to the widget name. Editing a widget enables you to rename it, change the period of time, select the tenant for which the data is displayed, and set filters.

**To add a widget**

Click **Add widget**, and then do one of the following:

- Click the widget that you want to add. The widget will be added with the default settings.
- To edit the widget before adding it, click the gear icon when the widget is selected. After editing the widget, click **Done**.

**To remove a widget**

Click the X sign next to the widget name.

**Protection status**

This widget shows the current protection status for all machines.

A machine can be in one of the following statuses:
- **Protected** – machines with applied protection plan.
- **Unprotected** – machines without applied protection plan. These include both discovered machines and managed machines with no protection plan applied.
- **Managed** – machines with installed protection agent.
- **Discovered** – machines without installed protection agent.

If you click on the machine status, you will be redirected to the list of machines with this status for more details.

### Discovered machines

This widget shows the list of discovered machines during the specified time range.

<table>
<thead>
<tr>
<th>Device name</th>
<th>IP address</th>
<th>OS</th>
<th>Organizational unit</th>
<th>Discovery type</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>10.250.41.189</td>
<td>-</td>
<td>-</td>
<td>Manual</td>
</tr>
<tr>
<td>-</td>
<td>10.248.44.199</td>
<td>-</td>
<td>-</td>
<td>Manual</td>
</tr>
<tr>
<td>win-6g34mv70qa3</td>
<td>10.248.90.221</td>
<td>Windows Server 2012 R2</td>
<td>-</td>
<td>Local Network</td>
</tr>
<tr>
<td>device1</td>
<td>10.248.90.238</td>
<td>Windows 10 Enterprise 2016 LTSB</td>
<td>OU1</td>
<td>Active Directory, Local Network</td>
</tr>
<tr>
<td>device2</td>
<td>-</td>
<td>Windows 10 Enterprise 2016 LTSB</td>
<td>OU1</td>
<td>Active Directory</td>
</tr>
<tr>
<td>device3</td>
<td>10.248.91.243</td>
<td>Windows 10 Enterprise 2016 LTSB</td>
<td>OU1</td>
<td>Active Directory, Manual, Loc...</td>
</tr>
<tr>
<td>device4</td>
<td>10.248.91.125</td>
<td>Windows 10 Enterprise 2016 LTSB</td>
<td>-</td>
<td>Active Directory, Local Network</td>
</tr>
<tr>
<td>device5</td>
<td>-</td>
<td>Windows 10 Enterprise 2016 LTSB</td>
<td>-</td>
<td>Active Directory, Manual</td>
</tr>
</tbody>
</table>
#CyberFit Score by machine

This widget shows for each machine the total #CyberFit Score, its compound scores, and findings for each of the assessed metrics:

- Antimalware
- Backup
- Firewall
- VPN
- Encryption
- NTLM traffic

To improve the score of each of the metrics, you can view the recommendations that are available in the report.

For more details about the #CyberFit Score, refer to "#CyberFit Score for machines".

## Endpoint Detection and Response (EDR) widgets

**Important**
This is an Early Access version of the EDR documentation. Some of the features and descriptions may be incomplete.

Endpoint Detection and Response (EDR) includes a number of widgets which can be accessed from the Operations dashboard.

The widgets available are:

- Top incident distribution per workload
- Incident MTTR
- Security incident burndown
- Workload network status
Top incident distribution per workload

This widget displays the top five workloads with the most incidents (click **Show all** to redirect to the incident list, which is filtered according to the widget settings).

Hover over a workload row to view a breakdown of the current investigation state for the incidents; the investigation states are **Not started**, **Investigating**, **Closed**, and **False positive**. Then click on the workload you want to analyze further, and select the relevant customer in the displayed popup; the incident list is refreshed according to the widget settings.

### Top Incident distribution per workload

<table>
<thead>
<tr>
<th>Workload</th>
<th>Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCRANTON</td>
<td>123</td>
</tr>
<tr>
<td>qa-gw3t68hh</td>
<td>41</td>
</tr>
<tr>
<td>RG_345</td>
<td>32</td>
</tr>
<tr>
<td>Georgy_Win_64</td>
<td>11</td>
</tr>
<tr>
<td>w_35jf_4</td>
<td>12</td>
</tr>
</tbody>
</table>

**Show all**

Incident MTTR

This widget displays the average resolution time for security incidents. It indicates how quickly incidents are being investigated and resolved.

Click on a column to view a breakdown of the incidents according to severity (**Critical**, **High**, and **Medium**), and an indication of how long it took to resolve the different severity levels. The % value shown in parentheses indicates the increase or decrease in comparison to the previous time period.

### Incident MTTR

- Critical: **4 h** (-1.1%)
- High: **1 h** (-1.1%)
- Medium: **2 h** (-1.1%)

![Incident MTTR graph]

92
Security incident burndown

This widget shows the efficiency rate in closing incidents; the number of open incidents are measured against the number of closed incidents over a period of time.

Hover over a column to view a breakdown of the closed and open incidents for the selected day. If you click the Open value, a popup is displayed in which you select the relevant tenant; the filtered incident list for the selected tenant is displayed, to display incidents currently open (in the Investigating or Not started states). If you click the Closed value, the incident list is displayed for the selected tenant, and filtered to display incidents that are no longer open (in the Closed or False positive states).

The % value shown in parentheses indicates the increase or decrease in comparison to the previous time period.

![Security incident burndown](image)

Workload network status

This widget displays the current network status of your workloads, and indicates how many workloads are isolated and how many are connected.

Click the Isolated value; a popup is displayed in which you select the relevant tenant. The displayed workload view is filtered to display isolated workloads. Click the Connected value to view the Workload with agents list filtered to display connected workloads (for the selected tenant).
Disk health monitoring

Disk health monitoring provides information about the current disk health status and a forecast about it, so that you can prevent data loss that might be related to a disk failure. Both HDD and SSD disks are supported.

Limitations

- Disk health forecast is supported only for machines running Windows.
- Only disks of physical machines are monitored. Disks of virtual machines cannot be monitored and are not shown in the disk health widgets.
- RAID configurations are not supported. The disk health widgets do not include any information about machines with RAID implementation.
- NVMe SSDs are not supported.

The disk health is represented by one of the following statuses:

- **OK**
  Disk health is between 70% and 100%.
- **Warning**
  Disk health is between 30% and 70%.
- **Critical**
  Disk health is between 0% and 30%.
- **Calculating disk data**
  The current disk status and forecast are being calculated.

How it works

The Disk Health Prediction Service uses an AI-based prediction model.

1. The protection agent collects the SMART parameters of the disks and passes this data to the Disk Health Prediction Service:
• SMART 5 – Reallocated sectors count.
• SMART 9 – Power-on hours.
• SMART 187 – Reported uncorrectable errors.
• SMART 188 – Command timeout.
• SMART 197 – Current pending sector count.
• SMART 198 – Offline uncorrectable sector count.
• SMART 200 – Write error rate.

2. The Disk Health Prediction Service processes the received SMART parameters, makes forecasts, and then provides the following disk health characteristics:
   • Disk health current state: OK, warning, critical.
   • Disk health forecast: negative, stable, positive.
   • Disk health forecast probability in percentage.
   The prediction period is one month.

3. The Monitoring Service receives these characteristics, and then shows the relevant information in the disk health widgets in the Cyber Protect console.

Disk health widgets
The results of the disk health monitoring are presented in the following widgets that are available in the Cyber Protect console.

• **Disk health overview** is a treemap widget with two levels of detail that can be switched by drilling down.
  - **Machine level**
    Shows summarized information about the disk health status of the selected customer machines. Only the most critical disk status is shown. The other statuses are shown in a tooltip when you hover over a particular block. The machine block size depends on the total size of all disks of the machine. The machine block color depends on the most critical disk status found.
Disk health overview

Resources

HV12-long
Total size: 2.27 TB
Warning: 1/3 disks

- Disk level
  Shows the current disk health status of all disks for the selected machine. Each disk block shows one of the following disk health forecasts and its probability in percentage:
  - Will be degraded
  - Will stay stable
- **Disk health status** is a pie chart widget that shows the number of disks for each status.

```
Disk health overview

Resources / HV12:long

WDC WD1003FBYX-01Y7B0 WD-W...  
  Disk size: 931.51 GB  
  Forecast: will be degraded (55%)

ST31000333AS STE0DDTP  
  Disk size: 931.51 GB  
  Forecast: will stay stable (85%)

WDC WD5000AAKS-00D2B0 WD-WCA5YF284499  
  Disk size: 465.76 GB  
  Forecast: will stay stable (58%)
```
Disk health status alerts

The disk health check runs every 30 minutes, while the corresponding alert is generated once a day. When the disk health changes from **Warning** to **Critical**, an alert always is generated.

<table>
<thead>
<tr>
<th>Alert name</th>
<th>Severity</th>
<th>Disk health status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disk failure is possible</td>
<td>Warning</td>
<td>(30 – 70)</td>
<td>The <code>&lt;disk name&gt;</code> disk on this machine is likely to fail in the future. Run a full image backup of this disk as soon as possible, replace it, and then recover the image to the new disk.</td>
</tr>
<tr>
<td>Disk failure is imminent</td>
<td>Critical</td>
<td>(0 – 30)</td>
<td>The <code>&lt;disk name&gt;</code> disk on this machine is in a critical state, and will most likely fail very soon. We do not recommend an image backup of this disk at this point, as the added stress can cause the disk to fail. Back up the most important files on this disk immediately and replace it.</td>
</tr>
</tbody>
</table>

Data protection map

The data protection map feature allows you to examine all data that are important for you and get detailed information about number, size, location, protection status of all important files in a treemap scalable view.

Each block size depends on the total number/size of all important files that belong to a customer/machine.

Files can have one of the following protection statuses:

- **Critical** – there are 51-100% of unprotected files with the extensions specified by you that are not being backed up for the selected customer tenant/machine/location.
- **Low** – there are 21-50% of unprotected files with the extensions specified by you that are not being backed up for the selected customer tenant/machine/location.
- **Medium** – there are 1-20% of unprotected files with the extensions specified by you that are not being backed up for the selected customer tenant/machine/location.
- **High** – all files with the extensions specified by you are protected (backed up) for the selected customer tenant/machine/location.

The results of the data protection examination can be found on the dashboard in the Data Protection Map widget, a treemap widget that has two levels of details that can be switched by drilling down:

- Customer tenant level – shows summarized information about the protection status of important files per customers that you have selected.
• Machine level – shows information about the protection status of important files per machines of the selected customer.

To protect files that are not protected, hover over the block and click **Protect all files**. In the dialog window, you can find information about the number of unprotected files and their location. To protect them, click **Protect all files**.

You can also download a detailed report in CSV format.
Vulnerability assessment widgets

Vulnerable machines
This widget shows the vulnerable machines by the vulnerability severity.
The found vulnerability can have one of the following severity levels according to the Common Vulnerability Scoring System (CVSS) v3.0:

- Secured: no vulnerabilities are found
- Critical: 9.0 - 10.0 CVSS
- High: 7.0 - 8.9 CVSS
- Medium: 4.0 - 6.9 CVSS
- Low: 0.1 - 3.9 CVSS
- None: 0.0 CVSS

Existing vulnerabilities
This widget shows currently existing vulnerabilities on machines. In the Existing vulnerabilities widget, there are two columns showing timestamps:

- **First detected** – date and time when a vulnerability was detected initially on the machine.
- **Last detected** – date and time when a vulnerability was detected the last time on the machine.
Patch installation widgets

There are four widgets related to the patch management functionality.

Patch installation status

This widget shows the number of machines grouped by the patch installation status.

- **Installed** – all available patches are installed on a machine
- **Reboot required** – after patch installation reboot is required for a machine
- **Failed** – patch installation failed on a machine

Patch installation summary

This widget shows the summary of patches on machines by the patch installation status.
Patch installation history
This widget shows the detailed information about patches on machines.

Missing updates by categories
This widget shows the number of missing updates per category. The following categories are shown:

- Security updates
- Critical updates
- Other

Backup scanning details
This widget shows the detailed information about the detected threats in backups.
Recently affected

This widget shows detailed information about workloads that were affected by threats, such as viruses, malware, and ransomeware. You can find information about the detected threats, the time when the threats were detected, and how many files were affected.

Downloading data for recently affected workloads

You can download the data for the recently affected workloads, generate a CSV file, and send it to the recipients that you specify.

To download the data for the recently affected workloads

1. In the Recently affected widget, click Download data.
2. In the Time period field, enter the number of days for which you want to download data. The maximum number of days that you can enter is 200.
3. In the Recipients field, enter the email addresses of all the people who will receive an email with a link for downloading the CSV file.
4. Click **Download**.

   The system starts generating the CSV file with the data for the workloads that were affected in the time period that you specified. When the CSV file is complete, the system sends an email to the recipients. Each recipient can then download the CSV file.

**Blocked URLs**

The widget shows the statistics of blocked URLs by category. For more information about URL filtering and categorization, see the Cyber Protection *user guide*.

Software inventory widgets

The **Software inventory** table widget shows detailed information about all the software that is installed on Windows and macOS devices in your clients' organizations.
The **Software overview** widget shows the number of new, updated, and deleted applications on Windows and macOS devices in your clients' organizations for a specified time period (7 days, 30 days, or the current month).

![Software overview widget]

When you hover over a certain bar on the chart, a tooltip with the following information shows:

- **New** - the number of newly installed applications.
- **Updated** - the number of updated applications.
- **Removed** - the number of removed applications.

When you click the part of the bar that corresponds to a certain status, a pop-up window loads. It lists all the customers that have devices with applications in the selected status on the selected date. You can select a customer from the list, click **Go to customer**, and you will be redirected to the **Software Management -> Software Inventory** page in the customer's Cyber Protect console. The information in the page is filtered for the corresponding date and status.

**Hardware inventory widgets**

The **Hardware inventory** and **Hardware details** table widgets show information about all the hardware that is installed on physical and virtual Windows and macOS devices in your clients' organizations.
The **Hardware changes** table widget shows information about the added, removed, and changed hardware on physical and virtual Windows and macOS devices in your clients' organizations for a specified time period (7 days, 30 days, or the current month).

**Session history**

The widget shows the detailed information about the remote desktop and file transfer sessions that were conducted in your clients' organizations during a specified time period.
Sales and billing

The Sales and billing dashboard provides a number of customizable widgets that give an overview of operations related to Advanced Automation.

By default, the data is displayed for the tenant in which you are operating, provided they have the Advanced Automation service enabled.

The widgets have clickable elements that enable you to investigate and troubleshoot issues. You can also download the current state of the dashboard in the .pdf format, or send it via email to any address, including external recipients.

To rearrange the widgets on the dashboard

Drag and drop a widget by clicking on its name.

To edit a widget

Click the pencil icon in the top right corner of the widget. Editing a widget enables you to rename it.

To add a widget

Click Add widget, and then do one of the following:

- Click the widget that you want to add. The widget will be added with the default settings.
- To edit the widget before adding it, click Customize when the widget is selected. After editing the widget, click Done.

To remove a widget

Click the X sign next to the widget name.

Sales and billing widgets

This dashboard shows key metrics related to your current sales and billing, and includes:
• **Contracts to be invoiced:** This section displays the total amount of all current contract items that have not been billed for.

• **Sales items to be invoiced:** This section displays the total amount of all current sales items that have not been billed for. You can switch to the Invoices screen and start a new billing run for these items by clicking **Start billing run.**

• **Number of end users being served:** This section displays the total number of end customer’s users and contacts being served (including all active and inactive users and contacts).

• **Monthly services revenue per user:** This section displays the revenue value amount as a ratio of the **Contracts to be invoiced** divided by the **Number of end users being served.** You can switch to the Clients screen by clicking **Go to Clients.**

• **Net new MRR:** This graph displays three key metrics - MRR churn, MRR expansion, and net new MRR. The three metrics are displayed together by default but can be shown separately by clicking on the relevant metric name.

• **All sales items revenue:** This graph shows two key metrics - all sales items revenue that has been billed for, and all new sales items revenue. The two metrics are displayed together by default but can be shown separately by clicking on the relevant metric name.

• **Workloads:** This section displays the number of workloads under management, and the number of workloads that are included as part of a contract.

**Service desk**

The **Service desk** dashboard provides a number of customizable widgets that give an overview of service desk operations related to Advanced Automation.

By default, the data is displayed for the **tenant in which you are operating**, provided they have the Advanced Automation service enabled.

The widgets have clickable elements that enable you to investigate and troubleshoot issues. You can also download the current state of the dashboard in the .pdf format, or send it via email to any address, including external recipients.

**To rearrange the widgets on the dashboard**

Drag and drop a widget by clicking on its name.

**To edit a widget**

Click the pencil icon in the top right corner of the widget. Editing a widget enables you to rename it.

**To add a widget**

Click **Add widget**, and then do one of the following:

• Click the widget that you want to add. The widget will be added with the default settings.

• To edit the widget before adding it, click **Customize** when the widget is selected. After editing the widget, click **Done.**

**To remove a widget**

Click the X sign next to the widget name.
Service desk widgets

The Service desk dashboard shows key metrics related to your current ticketing operations, and includes:

- **Open tickets**: Displays the total number of current tickets that are not in the Closed status.
- **SLA breaches**: Displays the total number of tickets that are not Closed and that breach an SLA. Click View all SLA breaches to view the relevant tickets.
- **Unassigned tickets**: Displays the total number of current tickets that are not assigned to a technician.
- **Tickets due today**: Displays the total number of current tickets due today. Click Go to Tickets due today to view the relevant tickets.
- **Upcoming on-site visits**: Displays the total number of planned on-site visits. Click Go to Upcoming on-site visits to view the relevant tickets.
- **Tickets**: Displays the total number of tickets in all statuses, which is then broken down to tickets for today, the current week, and the current month.
- **Net promoter score**: Displays the NPS score for the current month and year based on the currently logged in user's tickets, and any tickets assigned to groups that the user is also a member of.
- **Ticket types**: Displays a pie chart and a breakdown in percentage values for all currently opened tickets per ticket type.
- **Ticket statistics**: Displays the total number per week/month (click Week or Month to switch between the two views) of all closed tickets vs tickets with SLA breaches.
- **Occupancy rate**: Displays your organization's average technician occupancy rate for either the last week or last month (click Week or Month to switch between the two views).

Audit log

The audit log provides a chronological record of the following events:

- Operations that are performed by users in the management portal
- Operations with cloud-to-cloud resources that are performed by users in the Cyber Protect console
- Cyber Scripting operations that are performed by users in the Cyber Protect console
- System messages about reached quotas and quota usage

The log shows events in the tenant in which you are currently operating and its child tenants. You can click an event to view more information about it.

Audit logs are stored in the data center and their availability cannot be affected by issues on end-user machines.

The log is cleaned up on a daily basis. The events are removed after 180 days.
Audit log fields

For each event, the log shows:

- **Event**
  Short description of the event. For example, *Tenant was created, Tenant was deleted, User was created, User was deleted, Quota was reached, Backup content was browsed, Script was changed.*

- **Severity**
  Can be one of the following:
  - **Error**
    Indicates an error.
  - **Warning**
    Indicates a potentially negative action. For example, *Tenant was deleted, User was deleted, Quota was reached.*
  - **Notice**
    Indicates an event that might need attention. For example, *Tenant was updated, User was updated.*
  - **Informational**
    Indicates a neutral informative change or action. For example, *Tenant was created, User was created, Quota was updated, Scripting plan was deleted.*

- **Date**
  The date and time when the event occurred.

- **Object name**
  The object with which the operation was performed. For example, the object of the *User was updated* event is the user whose properties were changed. For events related to a quota, the quota is the object.

- **Tenant**
  The name of the tenant that the object belongs to.

- **Initiator**
  The login of the user who initiated the event. For system messages and events initiated by upper-level administrators, the initiator is shown as *System.*

- **Initiator's tenant**
  The name of the tenant that the initiator belongs to. For system messages and events initiated by upper-level administrators, this field is empty.

- **Method**
  Shows whether the event was initiated via the web interface or via the API.

- **IP**
  The IP address of the machine from which the event was initiated.
Filtering and search

You can filter the events by type, severity, or date. You can also search the events by their name, object, tenant, initiator, and initiator's tenant.

Reporting

To create reports about services usage and operations, click Reports.

Usage

Usage reports provide historical data about use of the services. Usage reports are available in both CSV and HTML formats.

Report type

You can select one of the following report types:

- **Current usage**
  The report contains the current service usage metrics.
  The usage metrics are calculated within each of the child tenants' billing periods. If the tenants included in the report have different billing periods, the parent tenant's usage may differ from the sum of the child tenants' usages.

- **Current usage distribution**
  This report is available only for partner tenants that are managed by an external provisioning system. This report is useful when the billing periods of child tenants do not match the billing period of the parent tenant. The report contains the service usage metrics for child tenants calculated within the current billing period of the parent tenant. The parent tenant's usage is guaranteed to be equal to the sum of the child tenants' usages.

- **Summary for period**
  The report contains the service usage metrics for the end of the specified period, and the difference between the metrics in the beginning and at the end of the specified period.

- **Day-by-day for period**
  The report contains the service usage metrics and their changes for each day of the specified period.

Report scope

You can select the scope of the report from the following values:

- **Direct customers and partners**
  The report will include the service usage metrics only for the immediate child tenants of the tenant in which you are operating.

- **All customers and partners**
The report will include the service usage metrics for all child tenants of the tenant in which you are operating.

- **All customers and partners (including user details)**
  The report will include the service usage metrics for all child tenants of the tenant in which you are operating and for all users within the tenants.

**Metrics with zero usage**

You can reduce the number of rows in the report by showing information about the metrics that have non-zero usage, and hiding information about the metrics that have zero usage.

**Configuring scheduled usage reports**

A scheduled report covers service usage metrics for the last full calendar month. The reports are generated at 23:59:59 UTC on the first day of a month and sent on the second day of that month. The reports are sent to all administrators of your tenant who have the **Scheduled usage reports** check box selected in the user settings.

**Note**

The filtration by date is done by the timestamp when the event was submitted to the cloud, not by the time of activity start or completion. Therefore, if the connection to the server was interrupted, a daily report might contain data for more than one day.

**To enable or disable a scheduled report**

1. Log in to the management portal.
2. Ensure that you operate in the top-most tenant available to you.
3. Click **Reports** > **Usage**.
4. Click **Scheduled**.
5. Select or clear the **Send a monthly summary** report check box.
6. In **Level of detail**, select the report scope.
7. [Optional] Select **Hide metrics with zero usage** if you want to exclude metrics with zero usage from the report.

**Configuring custom usage reports**

This type of report can be generated on demand and cannot be scheduled. The report will be sent to your email address.

**To generate a custom report**

1. Log in to the management portal.
2. **Navigate to the tenant** for which you want to create a report.
3. Click **Reports** > **Usage**.
4. Select the **Custom** tab.
5. In **Type**, select the report type as described above.
6. [Not available for the Current usage report type] In Period, select the reporting period:
   - Current calendar month
   - Previous calendar month
   - Custom

7. [Not available for the Current usage report type] If you want to specify a custom reporting period, select the start and the end dates. Otherwise, skip this step.

8. In Level of detail, select the report scope as described above.

9. [Optional] Select Hide metrics with zero usage if you want to exclude metrics with zero usage from the report.

10. To generate the report, click Generate and send.

Sales and billing

The Sales and billing component of Advanced Automation includes a number of reports which can be accessed from the Reports > Sales and billing menu.

**Note**

Sales and billing reports are available to users with the following roles: Administrator, Director, Group manager, Finance manager, HR

Each Sales and billing report includes data within a specified time range, which can be changed as required. You can also add existing reports and widgets to each report to customize it according to your requirements, and download each report or send it via email in Excel (XLSX) or PDF format. See the sections below for more information.

The Sales and billing reports available are:

- Customer revenue
- Expenses
- "Predictive profitability" (p. 116)
- Gross profit by customer
- Gross profit summary

Adding a report

You can add an existing report, or add a custom report, to any of the reports, according to your requirements.

1. Click Add report.
2. Do one of the following:
   - To add a predefined report, search for and select it in the displayed list.
   - To add a custom report, click Custom, click the report name (the names assigned by default look like Custom(1)), and then add widgets to the report.
3. [Optional] Drag and drop the widgets to rearrange them.
4. [Optional] Edit the report as described below.
Adding a widget to a report
You can add widgets to any of the reports, according to your requirements.

1. Click Add widget.
2. In the displayed dialog, search for and add the relevant widget(s).
3. [Optional] Drag and drop the widgets to rearrange them.
4. [Optional] Edit the report as described below.

Editing the report settings
To edit a report, click its name, and then click Settings. When editing a report, you can:

- Rename the report.
- Change the displayed tenant for all widgets included in the report.
- If you have child tenants, then the Set one tenant for all widgets option is available for you.
  This option allows you to filter data in all widgets of the report by the selected tenant. If this option is not selected, then widgets will show data for all child tenants of your current tenant.
- Change the time range for all widgets included in the report.
- Schedule sending the report via email in PDF or/and Excel format.

Scheduling a report
You can schedule any report, and define who should receive it and in which format.

1. Click the report name, and then click Settings.
2. Enable the Scheduled option switch.
3. Specify the recipients’ email addresses.
4. Select the report format: PDF, Excel, or both.
5. Select the days and the time when the report will be sent.
6. Click Save in the upper-right corner.

Exporting and importing the report structure
You can export and import the report structure (the set of widgets and the report settings) to a JSON file. This may be useful for copying the report structure from one tenant to another tenant.

To export the report structure, click the report name, click the vertical ellipsis icon in the upper-right corner, and then click Export.

To import the report structure, click Add report, and then click Import.

Downloading a report
You can download any report by clicking Download and selecting the required format:
Customer revenue

The Customer revenue report enables you to track key sales metrics for each customer, including information for:

- All customers, selected one at a time.
- A specified time range.

To generate the Customer revenue report, go to Reports > Sales and billing, and then select Customer revenue. Then select the customer and relevant time period; for more information about customizing, downloading, and sending the report by email, see "Sales and billing" (p. 113).

The generated report includes the following widgets:

- Client spend, including:
  - Total amount recurring
  - Total amount non-recurring
  - Total amount VAR
  - Total amount
- Client average hourly rate, which shows the average hourly rate for tickets for the selected customer over the last six months.
- Client time spent, including:
  - Time spent on fixed price basis
  - Time spent on subsequent calculation basis
  - Time spent on other, non billable
- Endpoints part of a contract, which shows the total number of endpoints that are part of contracts with the customer.
- Total endpoints under management, which shows the total number of the customer's endpoints under management.
- Number of end users being served, which shows the total number of customer's users being served.
- Contracts to be invoiced, which shows the total amount of all current contract items.
- Monthly services revenue per user, which shows the total amount as the contracts to be invoiced divided by the number of end users being served.
- Contract items, which displays a list of contract items including their full year value.

Expenses

The Expenses report shows information about the cost of products and services provided to customers, and includes:
• Sales and contract line items within the defined report period.
• Billed or not yet billed items.
• Specific customer information or a report for all customers.
• Specific product information or a report for all products.

To generate the Expenses report, go to Reports > Sales and billing, and then select Expenses. Then select the customer, product, expense type, and relevant time period; for more information about customizing, downloading, and sending the report by email, see “Sales and billing” (p. 113).

The generated report includes:
• A general summary section.
• A customer section, which is a line by line review of product names or services provided to a customer.

**Predictive profitability**

The Predictive profitability report shows information about future profitability, based on the following information:
• Current contracts and active contract periods.
• Current active contract line items and the periods defined for these line items.
• History of ticket-based activities.
• History of sales items.
• Current prices and costs of products and services.

To generate the Predictive profitability report, go to Reports > Sales and billing, and then select Predictive profitability. Then select the customer, product, and relevant time period; for more information about customizing, downloading, and sending the report by email, see “Sales and billing” (p. 113).

The generated report includes:
• A general summary section.
• A summary per month section, including the % month on month and year on year growth rates.
• A summary of the last six months.
• A customer section, which is a line by line review of product names or services provided to a customer.

**Gross profit by customer**

The Gross profit by customer report enables you to track the profits and costs for specific customers, including information for:
• All customers, selected one at a time.
• A specified time range.
To generate the Gross profit by customer report, go to Reports > Sales and billing, and then select Gross profit by customer. Then select the customer and relevant time period; for more information about customizing, downloading, and sending the report by email, see “Sales and billing” (p. 113).

The generated report includes:

- A summary section.
- A breakdown of each contract for the selected customer.
- An overview of the profitability of the customer’s contracts, sales items, and labor costs.

**Gross profit summary**

The Gross profit summary report provides you with an analysis of your profits and costs, including information for:

- All customers, including one line summaries for each customer.
- A specified time range.
- A specified aggregation period (month / quarter / year).

To generate the Gross profit summary report, go to Reports > Sales and billing, and then select Gross profit summary. Then select the relevant dates in the Period field; for more information about customizing, downloading, and sending the report by email, see “Sales and billing” (p. 113).

The report includes a main summary section of all the selected customers and time period, where the total profit for a customer is calculated as the difference between profits and costs.

**Service desk**

The Service desk component of Advanced Automation includes a number of reports which can be accessed from the Reports > Service desk menu.

**Note**

Service desk reports are available to users with the following roles: Administrator, Director, Group manager, Finance manager, HR

Each Service desk report includes data within a specified time range, which can be changed as required. You can also add existing reports and widgets to each report to customize it according to your requirements, and download each report or send it via email in Excel (XLSX) or PDF format. See the sections below for more information.

The Service desk reports available are:

- Duration of finished tickets
- NPS tracking
- Number of updates in ticket
- SLA summary
- Technician performance metrics
• Tickets statistics
• Tickets with specific status

Adding a report
You can add an existing report, or add a custom report, to any of the reports, according to your requirements.

1. Click Add report.
2. Do one of the following:
   • To add a predefined report, search for and select it in the displayed list.
   • To add a custom report, click Custom, click the report name (the names assigned by default look like Custom(1)), and then add widgets to the report.
3. [Optional] Drag and drop the widgets to rearrange them.
4. [Optional] Edit the report as described below.
   You can also clone and delete the report, as required.

Adding a widget to a report
You can add widgets to any of the reports, according to your requirements.

1. Click Add widget.
2. In the displayed dialog, search for and add the relevant widget(s).
3. [Optional] Drag and drop the widgets to rearrange them.
4. [Optional] Edit the report as described below.

To rearrange the widgets on the dashboard
Drag and drop the widgets by clicking on their names.

To edit a widget
Click the pencil icon next to the widget name. Editing a widget enables you to rename it, change the period of time, select the tenant for which the data is displayed, and set filters.

To remove a widget
Click the X icon next to the widget name.

Editing the report settings
To edit a report, click its name, and then click Settings. When editing a report, you can:
• Rename the report.
• Change the displayed tenant for all widgets included in the report.
• If you have child tenants, then the Set one tenant for all widgets option is available for you. This option allows you to filter data in all widgets of the report by the selected tenant. If this option is not selected, then widgets will show data for all child tenants of your current tenant.
• Change the time range for all widgets included in the report.
• Schedule sending the report via email in PDF or/and Excel format.

Scheduling a report

You can schedule any report, and define who should receive it and in which format.

1. Click the report name, and then click **Settings**.
2. Enable the **Scheduled** option switch.
3. Specify the recipients’ email addresses.
4. Select the report format: PDF, Excel, or both.
5. Select the days and the time when the report will be sent.
6. Click **Save** in the upper-right corner.

Downloading a report

You can download any report by clicking **Download** and selecting the required format:

- Excel and PDF
- Excel
- PDF

Duration of finished tickets

The Duration of finished tickets report provides information about the duration of ticket resolutions, particularly the number of days between ticket creation and closure. This information enables you to pinpoint any excesses and manage them more efficiently.

To generate the Duration of finished tickets report, go to **Reports > Service desk**, and then select **Duration of finished tickets**. Then select the relevant dates in the **Period** field; for more information about customizing, downloading, and sending the report by email, see “Service desk” (p. 117).

NPS tracking

The NPS (Net promoter score) tracking report displays ticket ratings based on end-user feedback. Once a ticket is closed, an email is automatically sent to users so that they can rate the service.

The report enables you to track a number of key client metrics, including:

- The percentage ratio of all promoters to all respondents.
- The number of promoter respondents (end-users) with set ticket ratings of 9 and 10.
- The percentage ratio of all neutrals to all respondents.
- The number of neutral respondents (end-users) with set ticket ratings of 7 and 8.
- The percentage ratio of all detractors to all respondents.
- The number of detractor respondents (end-users) with set ticket ratings from 0 to 6.
- The NPS value, which is calculated as an average rating for all respondents.
To generate the NPS tracking report, go to **Reports > Service desk**, and then select **NPS tracking**. Then select the relevant dates in the **Period** field; you can also select a specific client and client end-user, as well as a support agent and support group to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see “Service desk” (p. 117).

**Number of updates in ticket**

The Number of updates in ticket report provides information on how many updates were made on tickets over a specific period of time, enabling you to locate tickets that are causing issues and not getting resolved quickly. For example, many updates may indicate a lack of knowledge from the engineer, with updates from both the engineer and end-user as they try to resolve the issue.

To generate the Number of updates in ticket report, go to **Reports > Service desk**, and then select **Number of updates in ticket report**. Then select the relevant dates in the **Period** field; for more information about customizing, downloading, and sending the report by email, see “Service desk” (p. 117).

**SLA summary**

The SLA summary report enables you to review key SLA metrics per company, group and technician. The following three key SLA metrics can be tracked in this report:

- First response SLA
- Next response time
- Resolution time

To generate the SLA summary report, go to **Reports > Service desk**, and then select **SLA summary**. Then select the relevant dates in the **Period** field; you can also select a specific user group and user to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see "Service desk" (p. 117).

**Technician performance metrics**

The Technician performance metrics report enables you to track key technicians' performance metrics, including:

- Hours coverage, including available working hours and actual work time registered.
- Accountability, including the cost of employment (calculated by multiplying the number of hours worked by the cost of those hours).
- Work coverage for tickets, including tickets assigned and worked on by the selected technician, in addition to the top three tickets with the highest lead time.
- Work coverage for projects, including current projects worked on and closed projects completed / not completed within the budgeted time.
- NPS (net promoter score) for the technician, including the best / worst rated tickets.
To generate the Technician performance metrics report, go to **Reports > Service desk**, and then select **Technician performance metrics**. Then select the relevant dates in the **Period** field; you can also select a specific user to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see "Service desk" (p. 117).

**Technician capacity planning**

The Technician capacity planning report enables you to track your engineers' workloads and their projected capacity over future periods. For each engineer included in the report, you can:

- View the total number of all available working hours (all available time minus weekends, approved PTOs, sick leave and public holidays) for the selected period.
- View the total number of all scheduled activities (including service desk activities) in days.
- View the total number of non-working days (including approved PTOs, sick leaves and public holidays) for the selected period.
- View the total time available for the selected period (calculated as working days minus all scheduled activities).

To generate the Technician capacity planning report, go to **Reports > Service desk**, and then select **Technician capacity planning**. Then select the relevant dates in the **Period** field and the relevant group type in the **Reports group by** field; you can also select a specific engineer to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see "Service desk" (p. 117).

**Tickets statistics**

The Ticket statistics report displays a graph of the total number of closed tickets and tickets that had an SLA breach. It displays the statistics for the current day, for the current month and the overall yearly statistics. The report enables you to quickly see the performance of your team and quickly identifies closed tickets versus breached tickets and if there was any improvement over the last months.

To generate the Tickets statistics report, go to **Reports > Service desk**, and then select **Tickets statistics**. Then select the relevant dates in the **Period** field; you can also select a specific client to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see "Service desk" (p. 117).

**Tickets with specific status**

The Tickets with specific status report enables you to locate tickets in a specific status, belonging to a specific category, or of a certain priority.

To generate the Tickets with specific status report, go to **Reports > Service desk**, and then select **Tickets with specific status**. Then select the relevant dates in the **Period** field; you can also select a status, category, and/or priority to fine-tune the report further. For more information about customizing, downloading, and sending the report by email, see "Service desk" (p. 117).
Operations reports

A report about operations can include any set of the Operations dashboard widgets. By default, all widgets show summary information for the tenant in which you are operating. You can change this individually for each widget by editing it, or for all widgets in the report settings.

Depending on the widget type, the report includes data for a time range or for the moment of browsing or report generation. See "Reported data according to widget type" (p. 138).

All historical widgets show data for the same time range. You can change this range in the report settings.

You can use default reports or create a custom report.

You can download a report or send it via email in XLSX (Excel) or PDF format.

The default reports are listed below:

<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>#CyberFit Score by machine</td>
<td>Shows the #CyberFit Score, based on the evaluation of security metrics and configurations for each machine, and recommendations for improvements.</td>
</tr>
<tr>
<td>Alerts</td>
<td>Shows alerts that occurred during a specified time period.</td>
</tr>
<tr>
<td>Backup scanning details</td>
<td>Shows the detailed information about detected threats in the backups.</td>
</tr>
<tr>
<td>Daily activities</td>
<td>Shows the summary information about activities performed during a specified time period.</td>
</tr>
<tr>
<td>Data protection map</td>
<td>Shows the detailed information about the number, size, location, protection status of all important files on machines.</td>
</tr>
<tr>
<td>Detected threats</td>
<td>Shows the details of the affected machines by number of blocked threats and the healthy and vulnerable machines.</td>
</tr>
<tr>
<td>Discovered machines</td>
<td>Shows all found machines in the organization network.</td>
</tr>
<tr>
<td>Disk health prediction</td>
<td>Shows predictions when your HDD/SSD will break down and current disk status.</td>
</tr>
<tr>
<td>Existing vulnerabilities</td>
<td>Shows the existing vulnerabilities for OS and applications in your organization. The report also displays the details of the affected machines in your network for every product that is listed.</td>
</tr>
<tr>
<td>Patch management summary</td>
<td>Shows the number of missing patches, installed patches, and applicable patches. You can drill down the reports to get the missing/installed patch information and details of all the systems.</td>
</tr>
<tr>
<td>Summary</td>
<td>Shows the summary information about the protected devices for a</td>
</tr>
<tr>
<td>Specification</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Weekly activities</td>
<td>Shows the summary information about activities performed during a specified time period.</td>
</tr>
<tr>
<td>Software inventory</td>
<td>Shows detailed information about the all the software that is installed on Windows and macOS machines in your clients' organizations.</td>
</tr>
<tr>
<td>Hardware Inventory</td>
<td>Shows detailed information about the all the hardware that is available on physical and virtual Windows and macOS machines in your clients' organizations.</td>
</tr>
<tr>
<td>Remote sessions</td>
<td>Shows the detailed information about the remote desktop and file transfer sessions that were conducted in your clients' organizations during a specified time period.</td>
</tr>
<tr>
<td>Timesheet</td>
<td>Shows the average work time that users have logged and provides a quick overview of how much time was spent on tickets and other things (such as manual time entries). This report is only available if the Advanced Automation service is enabled. For more information, see &quot;Timesheets&quot; (p. 125).</td>
</tr>
</tbody>
</table>

**Actions with reports**

To view a report, click its name.

**To add a new report**

1. In the Cyber Protect console, go to Reports.
2. Under the list of available reports, click Add report.
3. [To add a predefined report] Click the name of the predefined report.
4. [To add a custom report] Click Custom, and then add widgets to the report.
5. [Optional] Drag and drop the widgets to rearrange them.

**To edit a report**

1. In the Cyber Protect console, go to Reports.
2. In the list of reports, select the report that you want to edit.
   
   You can do the following:
   
   - Rename the report.
   - Change the time range for all widgets in the report.
   - Specify the report recipients and when the report will be send to them. The available formats are PDF and XLSX.

**To delete a report**

1. In the Cyber Protect console, go to Reports.
2. In the list of reports, select the report that you want to delete.
3. Click the ellipsis icon (...), and then click **Delete**.
4. Confirm your choice by clicking **Delete**.

**To schedule a report**
1. In the Cyber Protect console, go to **Reports**.
2. In the list of reports, select the report that you want to schedule, and then click **Settings**.
3. Enable the **Scheduled** switch.
   - Specify the email addresses of the recipients.
   - Select the format of the report.

**Note**
You can export up to 1000 items in a PDF file and up to 10 000 items in a XLSX file. The timestamps in the PDF and XLSX files use the local time of your machine.

- Select the language of the report.
- Configure the schedule.
4. Click **Save**.

**To download a report**
1. In the Cyber Protect console, go to **Reports**.
2. In the list of reports, select the report, and then click **Download**.
3. Select the format of the report.

**To send a report**
1. In the Cyber Protect console, go to **Reports**.
2. In the list of reports, select the report, and then click **Send**.
3. Specify the email addresses of the recipients.
4. Select the format of the report.
5. Click **Send**.

**To export the report structure**
1. In the Cyber Protect console, go to **Reports**.
2. In the list of reports, select the report.
3. Click ellipsis icon (...), and then click **Export**.

As a result, the report structure is saved on your machine as a JSON file.

**To dump the report data**
By using this option, you can export all data for a custom period, without filtering it, to a CSV file and send the CSV file to an email recipient.
**Note**
You can export up to 150,000 items in a CSV file. The timestamps in the CSV file use Coordinated Universal Time (UTC).

1. In the Cyber Protect console, go to **Reports**.
2. In the list of reports, select the report whose data you want to dump.
3. Click the ellipsis icon (...), and then click **Dump data**.
4. Specify the email addresses of the recipients.
5. In **Time range**, specify the custom period for which you want to dump data.

**Note**
Preparing CSV files for longer periods takes more time.

6. Click **Send**.

**Timesheets**

The Time management component of Advanced Automation includes a Timesheet report which can be accessed from the **Reports > Operations** menu. This report enables you to view the average work time that users have logged and provides a quick overview of how much time was spent on tickets and other things (such as manual time entries).

**Note**
The Timesheet report is available to users with the following roles: Administrator, Director, Group manager, Finance manager, HR

The Timesheet report includes data within a specified time range, which can be changed as required. The report consists of two main widget types:

- The **All Staff** widget, which includes a summary of all active users.
- Individual widgets for each user.

Each widget includes details on the average time logged during the selected period, the time spent on tickets, the time spent on projects, and the time allocated to manual time entries.

You can also add existing reports and widgets to the report to customize it according to your requirements, and download each report or send it via email in Excel (XLSX) or PDF format. See the relevant sections in "Service desk" (p. 117) for more information.
Executive summary

The Executive summary report provides an overview of the protection status of your customers’ environments and their protected devices for a specified time range.

The Executive summary report includes sections with dynamic widgets which show key performance metrics related to the clients’ use of the following cloud services: Backup, Antimalware protection, Vulnerability assessment, Patch management, Data Loss Prevention, Notary, Disaster Recovery, and Files Sync & Share.

There are several ways in which you can customize the report.

- Add or delete sections.
- Change the order of sections.
- Rename sections.
- Move widgets from one section to another.
- Change the order of the widgets in each section.
- Add or remove widgets.
- Customize widgets.

You can generate Executive summary reports in PDF and Excel format, and sent them to the stakeholders or owners of your customers’ organizations, so that they can easily see the technical and business value of the provided services.

Partner administrators can generate and send the Executive summary report to direct customers only. In case of a more complex tenant hierarchy that has sub partners, the sub partners will have to generate the report.
Executive summary widgets
You can add or remove the sections and widgets from the Executive summary report and thus control what information to include in it.

Workloads overview widgets
The following table provides more information about the widgets in the Workloads overview section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Cloud workloads protection status**       | This widget shows the number of protected and unprotected cloud workloads by type at the moment of the report’s generation. Protected cloud workloads are cloud workloads on which at least one backup plan is applied. Unprotected cloud workloads are cloud workloads on which no backup plan is applied. The following cloud workload types are shown in the chart (in alphabetical order from A to Z):  
  - Google Workspace Drive  
  - Google Workspace Gmail  
  - Google Workspace Shared Drive  
  - Hosted Exchange mailboxes  
  - Microsoft 365 mailboxes  
  - Microsoft 365 OneDrive  
  - Microsoft 365 SharePoint Online  
  - Microsoft Teams  
  - Websites  
  For some workload types, the following workload groups are used:  
  - Microsoft 365: Users, Groups, Public Folders, Teams, and Site Collections  
  - Google Workspace: Users, and Shared Drives  
  - Hosted Exchange: Users  
  If in one workload group there are more than 10 000 workloads, the widget does not display any data for the corresponding workloads.  
  For example, if the customer has a Microsoft 365 account with 10 000 mailboxes and OneDrive service for 500 users, they all belong to the Users workload group. The sum of these workloads is 10 500, which exceeds the 10 000 limitation of a workload group. Therefore, the widget will hide the corresponding workload types: Microsoft 365 mailboxes, and Microsoft 365 OneDrive. |
| **Cyber protection summary**                | The widget shows the key metrics of the Cyber protection performance for the specified time range.  
  **Data backed up** - the total size of the archives that were created in the cloud and local storages. |
<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mitigated threats</strong></td>
<td>the total number of malware blocked across all devices.</td>
</tr>
<tr>
<td><strong>Malicious URLs blocked</strong></td>
<td>the total number of URLs blocked on all devices.</td>
</tr>
<tr>
<td><strong>Patched vulnerabilities</strong></td>
<td>the total number of vulnerabilities that were fixed through installation of software patches on all devices.</td>
</tr>
<tr>
<td><strong>Installed patches</strong></td>
<td>the total number of installed patches on all devices.</td>
</tr>
<tr>
<td><strong>Servers protected by DR</strong></td>
<td>the total number of servers protected by Disaster Recovery.</td>
</tr>
<tr>
<td><strong>File Sync &amp; Share users</strong></td>
<td>the total number of end and guest users who use Cyber Files.</td>
</tr>
<tr>
<td><strong>Notarized files</strong></td>
<td>the total number of notarized files.</td>
</tr>
<tr>
<td><strong>eSigned documents</strong></td>
<td>the total number of eSigned documents.</td>
</tr>
<tr>
<td><strong>Blocked peripheral devices</strong></td>
<td>the total number of blocked peripheral devices.</td>
</tr>
</tbody>
</table>

**Workload network status**
This widget indicates how many workloads are isolated and how many are connected (the normal state of the workload).
Select the relevant customer; the displayed workload view is filtered to display isolated workloads. Click the Connected value to view the Workload with agents list filtered to display connected workloads (for the selected customer).

**Workloads protection status**
The widget shows the protected and unprotected workloads by type at the moment of the report's generation. Protected workloads are workloads on which at least one protection or backup plan is applied. Unprotected workloads are workloads on which no protection or backup plan is applied. The following workloads are counted:

- **Servers** - physical servers, and Domain Controller servers.
- **Workstations** - physical workstations.
- **Virtual machines** - both agent-based and agentless virtual machines.
- **Web hosting servers** - virtual or physical server with installed cPanel or Plesk.
- **Mobile devices** - physical mobile devices.

One workload can belong to more than one category. For example, a web hosting server is counted in two categories - **Servers**, and **Web hosting servers**.

**Antimalware protection widgets**
The following table provides more information about the widgets in the **Threat defense** section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Antimalware</strong></td>
<td>The widget shows the results of on-demand antimalware scanning of the</td>
</tr>
<tr>
<td>Widget</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>scan of files</td>
<td>devices for the specified date range. &lt;br&gt;<strong>Files</strong> - the total number of scanned files  &lt;br&gt;<strong>Clean</strong> - the total number of clean files  &lt;br&gt;<strong>Detected, quarantined</strong> - the total number of infected files that were quarantined  &lt;br&gt;<strong>Detected, not quarantined</strong> - the total number of infected files that were not quarantined  &lt;br&gt;<strong>Devices protected</strong> - The total number of devices with applied antimalware protection policy  &lt;br&gt;<strong>Total number of registered devices</strong> - The total number of registered devices at the time of the report's generation</td>
</tr>
<tr>
<td>Antimalware scan of backups</td>
<td>The widget shows the results from the antimalware scanning of the backups for the specified date range, using the following metrics:  &lt;br&gt;• Total number of scanned recovery points  &lt;br&gt;• Number of clean recovery points  &lt;br&gt;• Number of clean recovery points with unsupported partitions  &lt;br&gt;• Number of infected recovery points. This metric includes the number of infected recovery points with unsupported partitions.</td>
</tr>
<tr>
<td>Blocked URLs</td>
<td>For the specified date range, the widget shows the number of blocked URLs grouped by website category.  &lt;br&gt;The widget lists the seven website categories that have the biggest number of blocked URLs, and combines the rest of the website categories into <strong>Other</strong>.  &lt;br&gt;For more information about the website categories, see the URL filtering topic in Cyber Protection.</td>
</tr>
<tr>
<td>Security incident burndown</td>
<td>This widget shows the efficiency rate in closing incidents for the selected company; the number of open incidents are measured against the number of closed incidents over a period of time.  &lt;br&gt;Hover over a column to view a breakdown of the closed and open incidents for the selected day. The % value shown in parentheses indicates the increase or decrease in comparison to the previous time period.</td>
</tr>
<tr>
<td>Incident MTTR</td>
<td>This widget displays the average resolution time for security incidents. It indicates how quickly incidents are being investigated and resolved.  &lt;br&gt;Click on a column to view a breakdown of the incidents according to severity (<strong>Critical</strong>, <strong>High</strong>, and <strong>Medium</strong>), and an indication of how long it took to resolve the different severity levels. The % value shown in parentheses indicates the increase or decrease in comparison to the previous time period.</td>
</tr>
</tbody>
</table>
## Threat status

This widget displays the current threat status for a company's workloads (regardless of the number of workloads), highlighting the current number of incidents that are not mitigated and that need investigating. The widget also indicates the number of incidents that were mitigated (manually and/or automatically by the system).

## Threats detected by protection technology

For the specified date range, the widget shows the number of detected threats grouped by the following protection technologies:

- Antimalware scanning
- Behavior engine
- Cryptomining protection
- Exploit prevention
- Ransomware active protection
- Real-time protection
- URL filtering

---

### Backup widgets

The following table provides more information about the widgets in the **Backup** section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workloads backed up</td>
<td>The widget shows the total number of registered workloads by backup status.</td>
</tr>
<tr>
<td><strong>Backed up</strong></td>
<td>number of workloads that were backed up (at least one successful backup was performed) during the report date range.</td>
</tr>
<tr>
<td><strong>Not backed up</strong></td>
<td>number of workloads which were not backed up (no successful backup was performed) during the report date range.</td>
</tr>
<tr>
<td>Disk health status by physical device</td>
<td>The widget shows the aggregated health status of physical devices based on the health statuses of their disks.</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>This disk health status relates to values [70-100]. The status of the device is <strong>OK</strong> when all its disks are in status <strong>OK</strong>.</td>
</tr>
<tr>
<td><strong>Warning</strong></td>
<td>This disk health status relates to values [30-70]. The status of a device is <strong>Warning</strong> when the status of at least one of its disks is <strong>Warning</strong>, and when there are no disks in status <strong>Error</strong>.</td>
</tr>
<tr>
<td><strong>Error</strong></td>
<td>This disk health status relates to values [0-30]. The status of the device is <strong>Error</strong> when the status of at least one of its disks is <strong>Error</strong>.</td>
</tr>
<tr>
<td><strong>Calculating disk data</strong></td>
<td>The status of the device is <strong>Calculating disk data</strong> when the statuses of its disks are not calculated yet.</td>
</tr>
<tr>
<td>Backup storage usage</td>
<td>For the specified time range, the widget shows the total number and total size of the backups in the cloud and local storage.</td>
</tr>
</tbody>
</table>
Vulnerability assessment and patch management widgets

The following table provides more information about the widgets in the Vulnerability assessment and patch management section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patched vulnerabilities</strong></td>
<td>The widget shows the vulnerability assessment performance results for the specified date range.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>the total number of patched vulnerabilities.</td>
</tr>
<tr>
<td><strong>Microsoft software vulnerabilities</strong></td>
<td>total number of fixed Microsoft vulnerabilities on all Windows devices.</td>
</tr>
<tr>
<td><strong>Windows third-party software vulnerabilities</strong></td>
<td>the total number of fixed Windows third-party vulnerabilities on all Windows devices.</td>
</tr>
<tr>
<td><strong>Workloads scanned</strong></td>
<td>the total number of devices which were successfully scanned for vulnerabilities at least once within the specified date range.</td>
</tr>
<tr>
<td><strong>Patches installed</strong></td>
<td>The widget shows the patch management performance results for the specified date range.</td>
</tr>
<tr>
<td><strong>Installed</strong></td>
<td>the total number of patches that were successfully installed on all devices.</td>
</tr>
<tr>
<td><strong>Microsoft software patches</strong></td>
<td>the total number of Microsoft software patches that were installed on all Windows devices.</td>
</tr>
<tr>
<td><strong>Windows third-party software patches</strong></td>
<td>the total number of Windows third-party software patches that were installed on all Windows devices.</td>
</tr>
<tr>
<td><strong>Workloads patched</strong></td>
<td>the total number of devices which were successfully patched (at least one patch was successfully installed during the specified date range).</td>
</tr>
</tbody>
</table>

Disaster Recovery widgets

The following table provides more information about the widgets in the Disaster recovery section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Disaster Recovery statistics</strong></td>
<td>The widget shows Disaster Recovery key performance metrics for the specified date range.</td>
</tr>
<tr>
<td><strong>Production failovers</strong></td>
<td>the number of production failover operations for the specified time range.</td>
</tr>
<tr>
<td><strong>Test failovers</strong></td>
<td>the total number of test failover operations that were performed during the specified time range.</td>
</tr>
<tr>
<td><strong>Primary servers</strong></td>
<td>the total number of primary servers at the moment of the report’s generation.</td>
</tr>
<tr>
<td>Widget</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Recovery servers</td>
<td>the total number of recovery servers at the moment of the report's generation.</td>
</tr>
<tr>
<td>Public IPs</td>
<td>the total number of public IP addresses (at the moment of the report's generation).</td>
</tr>
<tr>
<td>Total compute points consumed</td>
<td>the total number of compute points consumed during the specified time range.</td>
</tr>
<tr>
<td>Disaster Recovery servers tested</td>
<td>The widget shows information about the servers that are protected by Disaster Recovery and tested with test failover. The widget shows the following metrics: <strong>Server protected</strong> - the number of servers protected by Disaster Recovery (servers which have at least one recovery server) at the moment of the report's generation. <strong>Tested</strong> - the number of servers protected by Disaster Recovery which were tested using test failover during the selected time range, out of all servers protected by Disaster Recovery. <strong>Not tested</strong> - the number of servers protected by Disaster Recovery which were not tested using test failover during the selected time range, out of all servers protected by Disaster Recovery. The widget also shows the size of the Disaster Recovery storage (in GB) at the moment of the report's generation. It is the sum of the backup sizes of the cloud servers.</td>
</tr>
<tr>
<td>Servers protected with Disaster Recovery</td>
<td>The widget shows information about the servers protected with Disaster Recovery and the unprotected servers. The widget shows the following metrics: The total number of servers registered in customer tenant at the moment of the report's generation. <strong>Protected</strong> - the number of servers protected by Disaster Recovery (have at least one recovery server and an entire server backup) out of all registered servers at the moment of the report's generation. <strong>Unprotected</strong> - the total number of unprotected servers out of all registered servers at the moment of the report's generation.</td>
</tr>
</tbody>
</table>

**Data Loss Prevention widget**

The following topic provides more information about the Blocked peripheral devices in the **Data Loss Prevention** section.

The widget shows the total number of blocked devices and total number of blocked devices by device type for the specified date range.
• Removable storage
• Encrypted removable
• Printers
• Clipboard - includes the Clipboard and Screenshot capture device types.
• Mobile devices
• Bluetooth
• Optical drives
• Floppy drives
• USB - includes the USB port and Redirected USB port device types.
• FireWire
• Mapped drives
• Redirected clipboard - includes the Redirected clipboard incoming and Redirected clipboard outgoing device types.

The widget shows the first seven device types that have the highest number of blocked devices, and combines the rest of the device types into the Other device type.

File Sync & Share widgets

The following table provides more information about the widgets in the File Sync & Share section.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>File Sync &amp; Share statistics</strong></td>
<td>The widget shows the following metrics:</td>
</tr>
<tr>
<td></td>
<td>Total cloud storage used - The total storage usage of all users.</td>
</tr>
<tr>
<td></td>
<td>End users - the total number of end users.</td>
</tr>
<tr>
<td></td>
<td>Average storage used per end user - the average storage usage per end user.</td>
</tr>
<tr>
<td></td>
<td>Guest users - the total number of guest users.</td>
</tr>
<tr>
<td><strong>File Sync &amp; Share storage usage by end users</strong></td>
<td>The widget shows the total number of File Sync &amp; Share end users who have a storage usage in the following ranges:</td>
</tr>
<tr>
<td></td>
<td>• 0 - 1 GB</td>
</tr>
<tr>
<td></td>
<td>• 1 - 5 GB</td>
</tr>
<tr>
<td></td>
<td>• 5 - 10 GB</td>
</tr>
<tr>
<td></td>
<td>• 10 - 50 GB</td>
</tr>
<tr>
<td></td>
<td>• 50 - 100 GB</td>
</tr>
<tr>
<td></td>
<td>• 100 - 500 GB</td>
</tr>
<tr>
<td></td>
<td>• 500 - 1 TB</td>
</tr>
<tr>
<td></td>
<td>• 1+ TB</td>
</tr>
</tbody>
</table>

Notary widgets

The following table provides more information about the widgets in the Notary section.
<table>
<thead>
<tr>
<th><strong>Widget</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyber Notary statistics</td>
<td>The widget shows the following Notary metrics:</td>
</tr>
<tr>
<td></td>
<td><strong>Notary cloud storage used</strong> - the total size of the storage used for Notary services.</td>
</tr>
<tr>
<td></td>
<td><strong>Notarized files</strong> - the total number of notarized files.</td>
</tr>
<tr>
<td></td>
<td><strong>eSigned documents</strong> - the total number of eSigned documents and eSigned files.</td>
</tr>
<tr>
<td>Notarized files across end users</td>
<td>Shows the total number of notarized files for all end users. The users are grouped based on the number of notarized files that they have.</td>
</tr>
<tr>
<td></td>
<td>• Up to 10 files</td>
</tr>
<tr>
<td></td>
<td>• 11 - 100 files</td>
</tr>
<tr>
<td></td>
<td>• 101 - 500 files</td>
</tr>
<tr>
<td></td>
<td>• 501 - 1000 files</td>
</tr>
<tr>
<td></td>
<td>• 1000+ files</td>
</tr>
<tr>
<td>eSigned documents across end users</td>
<td>The widget shows the total number of eSigned documents and eSigned files for all end users. The users are grouped based on the number of eSigned documents and files that they have.</td>
</tr>
<tr>
<td></td>
<td>• Up to 10 files</td>
</tr>
<tr>
<td></td>
<td>• 11 - 100 files</td>
</tr>
<tr>
<td></td>
<td>• 101 - 500 files</td>
</tr>
<tr>
<td></td>
<td>• 501 - 1000 files</td>
</tr>
<tr>
<td></td>
<td>• 1000+ files</td>
</tr>
</tbody>
</table>

**Configuring the settings of the Executive summary report**

You can update the report settings that were configured when the Executive summary report was created.

*To update the settings of the executive summary report*

1. In the management console, go to **Reports>Executive summary**.
2. Click the name of the Executive summary report that want to update.
3. Click **Settings**.
4. Change the values of the fields as needed.
5. Click **Save**.

**Creating an Executive summary report**

You can create an Executive summary report, preview its content, configure the recipients of the report, and schedule when to send it automatically.

*To create an Executive summary report*
1. In the management console, go to **Reports** > **Executive summary**.
2. Click **Create executive summary report**.
3. In **Report name**, type the name of the report.
4. Select the Recipients of the report.
   - If you want to send the report to all direct customers, select **Send to all direct customers**.
   - If you want to send the report to specific customers
     a. Clear the **Send to all direct customers**.
     b. Click **Select contacts**.
     c. Select the specific customers. You can use the Search to easily find a specific contact.
     d. Click **Select**.
5. Select Range: **30 days** or **This month**
6. Select file format: **PDF**, **Excel**, or **Excel and PDF**.
7. Configure the scheduling settings.
   - If you want to send the report to the recipients at specific date and time:
     a. Enable the **Scheduled** option.
     b. Click the **Day of the month** field, clear the Last day field, and click the date that you want to set.
     c. In the **Time** field, enter the hour that you want to set.
     d. Click **Apply**.
   - If you want to create the report without sending it to the recipients, disable the **Scheduled** option.
8. Click **Save**.

**Customizing the Executive summary report**

You can determine what information to include in the Executive summary report. You can add or delete sections, add or delete widgets, rename sections, customize widgets, and drag and drop widgets and sections to change the order in which the information in the report appears.

**To add a section**

1. Click **Add item** > **Add section**.
2. In the **Add section** window, type a section name, or use the default section name.
3. Click **Add to report**.

**To rename a section**

1. In the section where you want to rename, click **Edit**.
2. In the **Edit section** window, type the new name.
3. Click **Save**.

**To delete a section**
1. In the section where you want to delete, click **Delete section**.
2. In the **Delete section** confirmation window, click **Delete**.

**To add a widget with default settings to a section**

1. In the section where you want to add the widget, click **Add widget**.
2. In the **Add widget** window, click the widget that you want to add.

**To add a customized widget to a section**

1. In the section where you want to add the widget, click **Add widget**.
2. In the **Add widget** window, find the widget that you want to add, and click **Customize**.
3. Configure the fields as necessary.
4. Click **Add widget**.

**To add a widget with default settings to the report**

1. Click **Add item > Add widget**.
2. In the **Add widget** window, click the widget that you want to add.

**To add a customized widget to the report**

1. Click **Add widget**.
2. In the **Add widget** window, find the widget that you want to add, and click **Customize**.
3. Configure the fields as necessary.
4. Click **Add widget**.

**To reset the default settings of a widget**

1. In the widget that you want to customize, click **Edit**.
2. Click **Reset to default**.
3. Click **Done**.

**To customize a widget**

1. In the widget that you want to customize, click **Edit**.
2. Edit the fields as necessary.
3. Click **Done**.

**Sending Executive summary reports**

You can send an Executive summary report on demand. In this case, the **Scheduled** setting is disregarded, and the report is sent immediately. When sending the report, the system uses the Recipients, Range, and File format values that are configured in **Settings**. You can manually change these settings before sending the report. For more information, see "Configuring the settings of the Executive summary report" (p. 134).

**To send an Executive summary report**
1. In the management portal, go to **Reports > Executive summary**.
2. Click the name of the Executive summary report that you want to send.
3. Click **Send now**.

   The system sends the Executive summary report to the selected recipients.

### Time zones in reports

The time zones used in reports vary depending on the report type. The following table contains information for your reference.

<table>
<thead>
<tr>
<th>Report location and type</th>
<th>Time zone used in the report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management portal &gt; Overview &gt; Operations (widgets)</td>
<td>The time of report generation is in the time zone of the machine where the browser is running.</td>
</tr>
</tbody>
</table>
| Management portal > Overview > Operations (exported to PDF or xlsx) | • The time stamp of the exported report is in the time zone of the machine that was used to export the report.  
• The time zone of the activities displayed in the report is UTC. |
| Management portal > Reports > Usage > Scheduled reports | • The report is generated at 23:59:59 UTC on the first day of the month.  
• The report is sent on the second day of the month. |
| Management portal > Reports > Usage > Custom reports | The time zone and date of the report is UTC. |
| Management portal > Reports > Operations (widgets) | • The time of report generation is in the time zone of the machine where the browser is running.  
• The time zone of the activities displayed in the report is UTC. |
| Management portal > Reports > Operations (exported to PDF or xlsx) | • The time stamp of the exported report is in the time zone of the machine that was used to export the report.  
• The time zone of the activities displayed in the report is UTC. |
| Management portal > Reports > Operations (scheduled delivery) | • The time zone of the report delivery is UTC.  
• The time zone of the activities displayed in the report is UTC. |
| Management portal > Users > Daily recap about active alerts | • This report is sent once a day between 10:00 and 23:59 UTC. The time when the report is sent depends on the workload in the datacenter.  
• The time zone of the activities displayed in the report is UTC. |
| Management portal > Users > Cyber Protection status notifications | • This report is sent when an activity is completed. |
Note
Depending on the workload in the datacenter, some reports might be sent with delays.
• The time zone of the activity in the report is UTC.

Reported data according to widget type

According to the data range that they display, widgets on the dashboard are two types:
• Widgets that display actual data at the moment of browsing or report generation.
• Widgets that display historical data.

When you configure a date range in the report settings to dump data for a certain period, the selected time range will apply only for widgets that display historical data. For widgets that display actual data at the moment of browsing, the time range parameter is not applicable.

The following table lists the available widgets and their data ranges.

<table>
<thead>
<tr>
<th>Widget name</th>
<th>Data displayed in widget and reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>#CyberFit Score by machine</td>
<td>Actual</td>
</tr>
<tr>
<td>5 latest alerts</td>
<td>Actual</td>
</tr>
<tr>
<td>Active alerts details</td>
<td>Actual</td>
</tr>
<tr>
<td>Active alerts summary</td>
<td>Actual</td>
</tr>
<tr>
<td>Activities</td>
<td>Historical</td>
</tr>
<tr>
<td>Activity list</td>
<td>Historical</td>
</tr>
<tr>
<td>Alerts history</td>
<td>Historical</td>
</tr>
<tr>
<td>Antimalware scan of backups</td>
<td>Historical</td>
</tr>
<tr>
<td>Antimalware scan of files</td>
<td>Historical</td>
</tr>
<tr>
<td>Backup scanning details (threats)</td>
<td>Historical</td>
</tr>
</tbody>
</table>
| Backup status                        | Historical - in columns **Total runs** and **Number of successful runs**
<pre><code>                                     | Actual - in all other columns        |
</code></pre>
<p>| Backup storage usage                 | Historical                           |
| Blocked peripheral devices           | Historical                           |
| Blocked URLs                         | Actual                               |
| Cloud applications                   | Actual                               |</p>
<table>
<thead>
<tr>
<th>Feature</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud workloads protection status</td>
<td>Actual</td>
</tr>
<tr>
<td>Cyber protection</td>
<td>Actual</td>
</tr>
<tr>
<td>Cyber protection summary</td>
<td>Historical</td>
</tr>
<tr>
<td>Data protection map</td>
<td>Historical</td>
</tr>
<tr>
<td>Devices</td>
<td>Actual</td>
</tr>
<tr>
<td>Disaster recovery servers tested</td>
<td>Historical</td>
</tr>
<tr>
<td>Disaster recovery statistics</td>
<td>Historical</td>
</tr>
<tr>
<td>Discovered machines</td>
<td>Actual</td>
</tr>
<tr>
<td>Disk health overview</td>
<td>Actual</td>
</tr>
<tr>
<td>Disk health status</td>
<td>Actual</td>
</tr>
<tr>
<td>Disk health status by physical devices</td>
<td>Actual</td>
</tr>
<tr>
<td>eSigned documents across end users</td>
<td>Actual</td>
</tr>
<tr>
<td>Existing vulnerabilities</td>
<td>Historical</td>
</tr>
<tr>
<td>File Sync &amp; Share statistics</td>
<td>Actual</td>
</tr>
<tr>
<td>File Sync &amp; Share storage usage by end users</td>
<td>Actual</td>
</tr>
<tr>
<td>Hardware changes</td>
<td>Historical</td>
</tr>
<tr>
<td>Hardware details</td>
<td>Actual</td>
</tr>
<tr>
<td>Hardware inventory</td>
<td>Actual</td>
</tr>
<tr>
<td>Historical alerts summary</td>
<td>Historical</td>
</tr>
<tr>
<td>Locations summary</td>
<td>Actual</td>
</tr>
<tr>
<td>Missing updates by categories</td>
<td>Actual</td>
</tr>
<tr>
<td>Not protected</td>
<td>Actual</td>
</tr>
<tr>
<td>Notarized files across end users</td>
<td>Actual</td>
</tr>
<tr>
<td>Notary statistics</td>
<td>Actual</td>
</tr>
<tr>
<td>Patch installation history</td>
<td>Historical</td>
</tr>
<tr>
<td>Patch installation status</td>
<td>Historical</td>
</tr>
<tr>
<td>Patch installation summary</td>
<td>Historical</td>
</tr>
<tr>
<td>Patched vulnerabilities</td>
<td>Historical</td>
</tr>
<tr>
<td>Metric</td>
<td>Type</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Patches installed</td>
<td>Historical</td>
</tr>
<tr>
<td>Protection status</td>
<td>Actual</td>
</tr>
<tr>
<td>Recently affected</td>
<td>Historical</td>
</tr>
<tr>
<td>Remote sessions</td>
<td>Historical</td>
</tr>
<tr>
<td>Security incident burndown</td>
<td>Historical</td>
</tr>
<tr>
<td>Security incident MTTR</td>
<td>Historical</td>
</tr>
<tr>
<td>Servers protected with disaster recovery</td>
<td>Actual</td>
</tr>
<tr>
<td>Software inventory</td>
<td>Actual</td>
</tr>
<tr>
<td>Software overview</td>
<td>Historical</td>
</tr>
<tr>
<td>Threat status</td>
<td>Actual</td>
</tr>
<tr>
<td>Threats detected by protection technology</td>
<td>Historical</td>
</tr>
<tr>
<td>Top incident distribution per workload</td>
<td>Actual</td>
</tr>
<tr>
<td>Vulnerable machines</td>
<td>Actual</td>
</tr>
<tr>
<td>Workload network status</td>
<td>Actual</td>
</tr>
<tr>
<td>Workloads backed up</td>
<td>Historical</td>
</tr>
<tr>
<td>Workloads protection status</td>
<td>Actual</td>
</tr>
</tbody>
</table>

**Estimating Cyber Protect Cloud costs with the calculator**

If you are using a trial version of Cyber Protect Cloud, you can estimate your costs using the calculator.

**Note**
The Cyber Protect Cloud calculator is accessible from the management portal only for trial partners and not accessible for their customers or non-trial partners.

**To estimate your Cyber Protect Cloud costs using the calculator**

1. Click **Calculate Monthly Costs** in the bottom-left corner of the management portal.
2. Specify the following details for your planned load:
   - The number of your workloads by workload type. For example, specify the number of virtual machines, workstations, hosting servers, Google Workplace seats, mobile devices, and Microsoft 365 seats.
   - The details of your data storage, such as the location of your data center and storage amount.
3. [Optional] Specify advanced backup, security, or management options you plan to use, along with the number of workloads for each.

4. Select a licensing model: per-workload or per-GB.

You will see an estimated monthly cost on the right.

You can become a partner by clicking the corresponding button, engaging in a chat with a specialist, or requesting a Cloud Advisor to reach out to you directly—all from the calculator page.

You can also initiate communication with the sales department by clicking **Contact Sales** in the bottom-left corner of the management portal.
Using the partner portal

The partner portal is designed for service providers, distributors, and resellers participating in the #CyberFit partner program.

With the partner portal, you can access content, tools, and training.

To start using the partner portal

1. Access the partner portal in one of the following ways:
   - Click Become a partner in the bottom-left corner of the management portal.
   - Visit the partner portal website.
2. Register your company in the partner program.
3. Receive the access details via email.
Using the vendor portal

The vendor portal (CyberApp Standard) is a platform that allows third-party software vendors to integrate their products and services into Cyber Protect Cloud.

With the vendor portal, you can:

- Gain access to the sandbox environment for development and testing.
- Add your solutions to the application catalog.
- Integrate workloads, alerts, widgets, and reports into Cyber Protect Cloud.
- Ensure the security of your data with industry-standard measures.

To start using the Vendor Portal

1. Register on the Technology Ecosystem website.
2. Activate your account.
Advanced Protection packs

Advanced protection packs can be enabled in addition to the Protection service and are subject to additional charge. Advanced protection packs provide unique functionality that does not overlap with the standard feature set and with other advanced packs. Clients can protect their workloads with one, several, or all advanced packs. The advanced protection packs are available for both billing modes of the Protection service - Per workload and Per gigabyte.

The Advanced File Sync & Share features can be enabled with the File Sync & Share service. It is available in both billing modes - Per user and Per gigabyte.

You can enable the following advanced protection packs:

- Advanced Backup
- Advanced Management
- Advanced Security
- Advanced Security + EDR
- Advanced Data Loss Prevention
- Advanced Disaster Recovery
- Advanced Email Security
- Advanced File Sync & Share
- Advanced Backup Workstation
- Advanced Backup Servers
- Advanced Backup Virtual machines
- Advanced Backup Web hosting servers
- Advanced Backup Microsoft 365 seats
- Advanced Backup Google Workspace seats

Note

Advanced packs can be used only when the feature that they extend is enabled. Users cannot use advanced features when the standard service feature is disabled. For example, users cannot use the features of the Advanced Backup pack if the Protection feature is disabled.

If an advanced protection pack is enabled, its features appear in the protection plan and are marked with the Advanced feature icon. When users try to enable the feature, they will be prompted that additional billing applies.

If an advanced protection pack is not enabled, but upsell is turned on, the advanced protection features appear in the protection plan, but are inaccessible for use. The following icon is displayed next to the feature name. A message will prompt users to contact their administrator to enable the required advanced feature set.
If an advanced protection pack is not enabled and upsell is turned off, customers will not see the advanced features in their protection plans.

**Included features and advanced packs in Cyber Protect services**

When you enable a service or feature set in Cyber Protect, you enable a number of features that are included and available by default. In addition, you can enable advanced protection packs.

The following sections contain high level overview of Cyber Protect service features and advanced packs. For a complete list of offerings, see the [Cyber Protect Licensing Guide](#).

**Included and advanced features in the Protection service**

<table>
<thead>
<tr>
<th>Feature group</th>
<th>Included standard features</th>
<th>Advanced features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td>• #CyberFit score&lt;br&gt;• Vulnerability assessment&lt;br&gt;• Anti-ransomware protection: Active protection&lt;br&gt;• Antivirus and Antimalware protection: Cloud signature-based file detection (no real-time protection, only scheduled scanning)<em>&lt;br&gt;• Antivirus and Antimalware protection: Pre-execution AI-based file analyzer, behavior-based Cyber Engine&lt;br&gt;• Microsoft Defender management</em>&lt;br&gt;*To detect zero day attacks, Cyber Protect uses heuristic scanning rules and algorithms to look for malicious commands.</td>
<td>There are two available advanced protection packs: <strong>Advanced Security</strong> and <strong>Advanced Security + EDR</strong>.&lt;br&gt;The Advanced Security pack includes:&lt;br&gt;• Antivirus and antimalware protection with local signature-based detection (with real-time protection)&lt;br&gt;• Exploit prevention&lt;br&gt;• URL filtering&lt;br&gt;• Endpoint firewall management&lt;br&gt;• Forensic backup, scan backups for malware, safe recovery, corporate allowlist&lt;br&gt;• Smart protection plans (integration with CPOC alerts)&lt;br&gt;• Centralized backup scanning for malware&lt;br&gt;• Remote wipe&lt;br&gt;• Microsoft Defender Antivirus&lt;br&gt;• Microsoft Security Essentials&lt;br&gt;The Advanced Security + EDR protection pack includes all of the above features, and the following Endpoint Detection and Response capabilities for identifying advanced threats or in-progress attacks:&lt;br&gt;• Manage incidents in a centralized...</td>
</tr>
<tr>
<td>Feature group</td>
<td>Included standard features</td>
<td>Advanced features</td>
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<tr>
<td>---------------</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Incident page</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Visualize the scope and impact of incidents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Recommendations and remediation steps</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Check for publicly disclosed attacks on your workloads using Threat feeds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Store security events for 180 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For information on enabling Advanced Security + EDR, see &quot;Enabling Advanced Security + EDR&quot; (p. 150).</td>
</tr>
<tr>
<td>Data Loss Prevention</td>
<td>• Device control</td>
<td>• Content-aware prevention of data loss from workloads via peripheral devices and network communication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Pre-built automatic detection of personally identifiable information (PII), protected health information (PHI), and Payment Card Industry Data Security Standard (PCI DSS) data, as well as documents in the &quot;Marked as Confidential&quot; category</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Automatic data loss prevention policy creation with optional end user assistance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Adaptive data loss prevention enforcement with automatic learning-based policy adjustment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cloud-based centralized audit logging, alerting, and end user notifications</td>
</tr>
<tr>
<td>Management</td>
<td>• Group management of workloads</td>
<td>• Patch management</td>
</tr>
<tr>
<td></td>
<td>• Centralized management of protection plans</td>
<td>• Disk health</td>
</tr>
<tr>
<td></td>
<td>• Hardware inventory</td>
<td>• Software inventory</td>
</tr>
<tr>
<td></td>
<td>• Remote control</td>
<td>• Fail-safe patching</td>
</tr>
<tr>
<td></td>
<td>• Remote actions</td>
<td>• Cyber Scripting</td>
</tr>
<tr>
<td></td>
<td>• Concurrent connections per technician</td>
<td>• Remote assistance</td>
</tr>
<tr>
<td></td>
<td>• Remote connection protocol: RDP</td>
<td>• File transfer and sharing</td>
</tr>
<tr>
<td></td>
<td>• Four monitors</td>
<td>• Selecting a session to connect</td>
</tr>
<tr>
<td></td>
<td>• Threshold-based monitoring</td>
<td>• Observing workloads in multi-view</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Connection modes: control, view-only, and curtain</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Connection via the Quick Assist application</td>
</tr>
<tr>
<td>Feature group</td>
<td>Included standard features</td>
<td>Advanced features</td>
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<tr>
<td>---------------</td>
<td>---------------------------</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Remote connection protocols: NEAR and Apple Screen Sharing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Session recording for NEAR connections</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Screenshot transmission</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Session history report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 24 monitors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Threshold-based monitoring</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Anomaly-based monitoring</td>
</tr>
<tr>
<td>Email security</td>
<td>None</td>
<td>Real-time protection for your Microsoft 365 and Gmail mailboxes:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Antimalware Antispam</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• URL scan in emails</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• DMARC analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Anti-phishing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Impersonation protection</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Attachments scan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content disarm and reconstruction</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Graph of trust</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See the configuration guide.</td>
</tr>
<tr>
<td>Cyber Disaster Recovery Cloud</td>
<td>You can use the Disaster Recovery standard features to test Disaster Recovery scenarios for your workloads. Note the Disaster Recovery standard features that are available, and their limitations:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Test failover in an isolated network environment. Limited to 32 compute points per month, and up to 5 test failover operations at the same time.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Recovery server configurations: 1 CPU and 2 GB RAM, 1 CPU and 4 GB RAM, and 2 CPU and 8 GB RAM.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Number of recovery points available for failover: only the last recovery point that is available right after a backup.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available connectivity modes: Cloud-only and Point-to-site.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Availability of the VPN gateway: The</td>
<td></td>
</tr>
<tr>
<td></td>
<td>You can enable the Advanced Disaster Recovery pack, and protect your workloads using the complete Disaster Recovery functionality. Note the Disaster Recovery advanced features that are available:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Production failover</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Test failover in an isolated network environment.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Number of recovery points available for failover: all recovery points that are available after the creation of the recovery server.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Primary servers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Recovery/Primary server configurations: No limitations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available connectivity modes: Cloud-only, Point-to-site, Site-to-site Open VPN, and Multi-site IPsec VPN.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Availability of the VPN gateway: The</td>
<td></td>
</tr>
</tbody>
</table>
### Feature group

<table>
<thead>
<tr>
<th>Feature group</th>
<th>Included standard features</th>
<th>Advanced features</th>
</tr>
</thead>
</table>
|               | VPN gateway will be temporarily suspended if it is inactive for 4 hours after the last test failover completed, and will be deployed again when you start a test failover.  
- Number of cloud networks: 1.  
- Internet access  
- Operations with runbooks: create and edit. | always available.  
- Number of cloud networks: 23.  
- Public IP addresses  
- Internet access  
- Operations with runbooks: create, edit, and execute. |

### Pay as you go and advanced features in the Protection service

#### Feature group

<table>
<thead>
<tr>
<th>Feature group</th>
<th>Pay-as-you-go features</th>
<th>Advanced features</th>
</tr>
</thead>
</table>
| Backup        | File backup  
Image backup  
Applications backup  
Network shares backup  
Backup to cloud storage  
Backup to local storage | One-click recovery  
Continuous data protection  
Backup support for Microsoft SQL Server clusters and Microsoft Exchange clusters – Always On Availability Groups (AAG) and Database Availability Groups (DAG)  
Backup support for MariaDB, MySQL, Oracle DB, and SAP HANA  
Data protection map and compliance reporting  
Off-host data processing  
Group management for Microsoft 365 and Google Workspace workloads  
Backup frequency for Microsoft 365 and Google Workspace workloads  
Remote operations with bootable media  
Direct backup to Microsoft Azure public cloud storage |
| File Sync & Share | Store encrypted file-based content  
Synchronize files across designated devices  
Share folders and files with designated people and systems | Notarization and e-signature  
Document templates*  
*Backup of sync and share files |
<p>| Physical Data Shipping | Physical Data Shipping functionality | N/A |</p>
<table>
<thead>
<tr>
<th>Feature group</th>
<th>Pay-as-you-go features</th>
<th>Advanced features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notary</td>
<td>• File notarization</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• File eSigning</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Document templates</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

You cannot enable advanced protection packs without enabling the standard protection feature that they extend. If you disable a feature, its advanced packs are disabled automatically and the protection plans that use them will be automatically revoked. For example, if you disable the Protection feature, its advanced packs will be disabled automatically and all plans that use them will be revoked.

Users cannot use advanced protection packs without standard protection, but can use only included features of standard protection together with advanced packs on specific workloads. In this case, they will be charged only for the advanced packs that they use.

For information about billing, see "Billing modes for Cyber Protect" (p. 8).

**Advanced Data Loss Prevention**

The Advanced Data Loss Prevention module prevents the leakage of sensitive information from workstations, servers, and virtual machines by inspecting the content of data transferred through local and network channels and applying the organization-specific data flow policy rules.

Before you start using the Advanced Data Loss Prevention module, verify that you read and understand the basic concepts and logic of Advanced Data Loss Prevention management that are described in the Fundamentals guide.

You might also want to review the Technical Specifications document.

**Enabling Advanced Data Loss Prevention**

By default, Advanced Data Loss Prevention is enabled in the configuration for new tenants. If the functionality was disabled during the tenant creation process, Partner administrators can enable it later.

**To enable Advanced Data Loss Prevention**

1. In the Cyber Protect Cloud management console, navigate to Clients.
2. Select the tenant for editing.
3. In the Select services section, scroll to Protection, and under the billing mode that you apply, select Advanced Data Loss Prevention.
4. Under Configure services, scroll to the Advanced Data Loss Prevention and configure quotas. By default, the quota is set to unlimited.
5. Save your settings.
Advanced Security + EDR

Endpoint detection and response (EDR) detects suspicious activity on workloads, including attacks that have gone unnoticed, and generates incidents. These incidents provide a step-by-step overview of each attack, helping you understand how an attack happened and how to prevent it from happening again. With easy-to-understand interpretations of each stage in the attack, the time spent on investigating attacks can be reduced to a matter of minutes.

Enabling Advanced Security + EDR

As the partner administrator, you can enable the Advanced Security + EDR protection pack to provide Endpoint detection and response (EDR) functionality in client protection plans.

To enable the Advanced Security + EDR pack

1. Log in to the management portal.

   **Note**
   If prompted, select the clients you want to apply the Advanced Security + EDR protection pack to, and click Enable.

2. In the left navigation pane, click CLIENTS.
3. Under Cyber Protect, click the Protection tab.
   The list of existing clients subscribed to the Protection service is displayed.
4. Click the relevant client you want to add the Advanced Security + EDR pack to.
   In the Configure tab, under the Protection section, ensure the Advanced Security + EDR
Advanced Disaster Recovery

You can enable the Advanced Disaster Recovery pack, and protect your workloads using the complete Disaster Recovery functionality.

The following advanced Disaster Recovery features are available:

- Production failover
- Test failover in an isolated network environment.
- Number of recovery points available for failover: all recovery points that are available after the creation of the recovery server.
- Primary servers
- Recovery/Primary server configurations: No limitations
- Available connectivity modes: Cloud-only, Point-to-site, Site-to-site Open VPN, and Multi-site IPsec VPN.
- Availability of the VPN gateway: always available.
- Number of cloud networks: 23.
• Public IP addresses
• Internet access
• Operations with runbooks: create, edit, and execute.

Advanced Email Security

The Advanced Email Security pack provides real-time protection for your Microsoft 365, Google Workspace, or Open-Xchange mailboxes:

• Antimalware and anti-spam
• URL scan in emails
• DMARC analysis
• Anti-phishing
• Impersonation protection
• Attachments scan
• Content disarm and reconstruction
• Graph of trust

You can also enable Microsoft 365 collaboration app seats, which allows the protection of Microsoft 365 cloud collaboration applications from content-borne security threats. These applications include OneDrive, SharePoint, and Teams.

Advanced Email Security can be enabled per workload or per gigabyte and will impact your licensing model.

Learn more about Advanced Email Security in the Advanced Email Security data sheet.

For configuration instructions, see Advanced Email Security with Perception Point.

Advanced Backup

You can enable the Advanced Backup pack and protect your workloads with advanced backup and recovery features.

The following features are available:

• One-click recovery
• Continuous data protection
• Backup support for Microsoft SQL Server clusters and Microsoft Exchange clusters – Always On Availability Groups (AAG) and Database Availability Groups (DAG)
• Backup support for MariaDB, MySQL, Oracle DB, and SAP HANA
• Data protection map and compliance reporting
• Off-host data processing
• Group management for Microsoft 365 and Google Workspace workloads
• Backup frequency for Microsoft 365 and Google Workspace workloads
• Remote operations with bootable media
• Direct backup to Microsoft Azure public cloud storage

Advanced Management

With Advanced Management, you can build a fast, proactive and responsive management infrastructure that prevents most problems.

The Advanced Management pack includes the following features:

• **Software inventory** - See the complete list of software used by clients and save time and effort when preparing, planning, or tracking updates.

• **Automated patch management** - Remediate vulnerabilities before they are exploited.

• **Fail-safe patching** - Recover workloads from faulty patches quickly and easily by performing automatic system backups before patching.

• **Monitoring and smart alerting based on machine learning** - Mitigate operational risks and optimize the monitoring effort with predictive monitoring and alerts.

• **Out-of-the-box Cyber Scripting** - Automate and streamline routine tasks.

• **Drive health monitoring** - Use predictive monitoring and alerts and proactively mitigate downtime caused by drive failures.

• **Remote desktop and remote assistance** - Access remote workloads and resolve technical issues quickly. Save time and provide reliable support with excellent performance, even with limited bandwidth. The feature includes better platform coverage (Windows, macOS, and Linux), and extended capabilities for session recordings, remote actions, file transfers, monitoring, reporting, and observing workloads in multi view.
Advanced Automation

The Advanced Automation service makes it easy and intuitive for clients to take advantage of business management platforms and software. Comprised of a number of paid tools, Advanced Automation enables MSPs to fully manage and automate various daily tasks, including:

- Customer billing and invoicing.
- Customer support and service desk ticketing.
- Sales and project management.

Advanced Automation can also be enabled to work in tandem with other Cyber Protect Cloud services, and is subject to additional charge. Your account will be charged based on the number of users (or technicians) that are granted access to the Advanced Automation service.

Note
You will be charged for three users as a minimum, even if less than three users are granted access to the Advanced Automation service.

What is Advanced Automation?

Advanced Automation is a Business Management Tool for Managed Service Providers (MSPs), designed to make it easy and intuitive for MSPs to manage and automate various daily tasks.

Advanced Automation ensures your clients get the service they need, while at the same time, you remain in full control of your operations. The components that make up Advanced Automation include ticketing, RMM integration, automatic time registration, and consumption-based billing, while also providing quick and easy access to your client’s billing and ticketing data. You can also use the dedicated mobile application for your day-to-day service desk operations, including the monitoring and processing of tickets, and the tracking and registering of work time. The Acronis Advanced Automation app can be downloaded from the App Store and Google Play Store.

Your account is charged for each user granted access to the service. Note that you are charged for a minimum of three users, even if less than three users have access to Advanced Automation.

Key features of Advanced Automation include:

- **Manage service desk tickets**: Support tickets are automatically converted from incoming emails and alerts from third-party integrated platforms, if enabled. For more information, see “Service desk” (p. 169).
- **Manage billing**: Invoices are automatically generated based on the time spent with your client or according to the billing arrangement you have with them. For more information, see “Managing sales and billing functionality” (p. 186).
- **Manage time registrations and activities**: Approve ticket time for billing, request time off, and approve holidays as an admin user or manager. For more information, see “Time entries” (p. 178).
• **Native integration with Acronis services:** This includes usage-based customer billing and device control with Advanced Management.

### Activating Advanced Automation for clients

As described during the tenant creation process (see "Selecting the services for a tenant" (p. 40)), you can add services as required for tenants.

The Advanced Automation service is available for the following tenant types:

- Partner
- Customer

**To activate Advanced Automation**

1. In the management portal, go to **Clients**.
2. Select the tenant for editing.
3. In the **Configure** tab, under the **Service** section, scroll down and select **Advanced Automation**.
   
   Advanced Automation is now available for the selected client.

### Setting up Advanced Automation

This section describes the various steps you need to complete to get up and running with Advanced Automation.

### Enabling Advanced Automation

If the Advanced Automation service is activated for your account, you can enable the service by navigating to **Settings**. If the Advanced Automation service is not activated, contact your administrator.

**To enable Advanced Automation**

1. In the management portal, click **Settings > Advanced Automation**.

   **Note**

   After you have enabled Advanced Automation, as described in the following steps, this menu option is not available.

2. In the displayed screen, click **Enable Advanced Automation**.
3. In the Enable Advanced Automation screen, provide the company business information in the **Company information** tab. Then click **Next**.
4. In the **User roles** tab, define the Advanced Automation role for each user, and then click **Next**.

   The available roles are:
   - Engineer
   - HR
   - Finance
To understand more about each of the Advanced Automation roles and their access privileges, see "Advanced Automation roles" (p. 165).

**Note**
You can also add new users after enabling Advanced Automation. First create the user account(s), and then apply the relevant services the user will have access to. For more information, see "Creating a user account" (p. 52).

5. In the **Confirmation** tab, review the activation information, and click **Enable**. The Advanced Automation service is configured, which may take a few seconds.

6. In the displayed onboarding wizard screen, select from the following Advanced Automation options:
   - **Accounting platforms integration**: Click **Configure** to redirect to the Accounting integrations page. For more information, see "Integrating with accounting platforms" (p. 248).
   - **RMM platforms integration**: Click **Configure** to redirect to the Advanced Automation (RMM) integrations page. For more information, see "Integrating with RMM platforms" (p. 253).
   - **Service desk integration**: Click **Configure** to redirect to **Settings > Service desk**. For more information, see "Service desk settings" (p. 212).
   - **Email server configuration**: Click **Configure** to redirect to the Configure email server screen. For more information, see "Configuring your email settings" (p. 166).

If you no longer want to use the functionality included in Advanced Automation, you can cancel the Advanced Automation service. For more information, see "Canceling the Advanced Automation service" (p. 270).

**Quick start to setting up Advanced Automation**

This quick start guide describes the basic steps required to get up and running with Advanced Automation.

Follow the steps in the table below to ensure:

- New and existing customers are set up in Advanced Automation.
- Your products and services are set up and available, with automatic billing also in place.
- Your service desk is set up and ready to support customers, monitor SLAs and track time spent on tickets and other activities.
- Your RMM and/or accounting platform is integrated and synchronized with Advanced Automation.
- Incoming emails are converted into tickets, and automated responses configured.
The table below describes the general steps required to start working with Advanced Automation.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| **STEP 1: Login and launch the Advanced Automation onboarding wizard** | Login to your account and access the management portal. When Advanced Automation is available in your account, two new menu options are displayed, Task management and Sales and billing. Select one of these options to access the Advanced Automation onboarding wizard; click **Enable** to enable the service, as described in **STEP 2**.

For more information, see “Enabling Advanced Automation” (p. 155). |
| **STEP 2: Enable the Advanced Automation service** | To enable the Advanced Automation service for your account, you will need to complete the following two steps:

a. Provide company business information, including bank account details, in the **Provide company info** tab. The company information is used in invoices to end customers. Then click **Next**.

b. Assign existing users to the following roles within Advanced Automation:
   - Engineer
   - HR
   - Finance
   - Sales
   - Group manager
   - Finance manager
   - Director
   - Administrator

   Note that there are two additional roles for your customer’s users:
   - Client
   - Client manager

For more information about the roles in Advanced Automation, see "Advanced Automation roles" (p. 165). If required, you can add additional users at a later time; see also "Managing users" (p. 52).

When done, you are now ready to start defining your Advanced Automation settings, as described in the following steps. |
| **STEP 3: Define Service desk settings** | Service desk settings determine essential sections of your service desk ticket flow, including categories, default values, default country and language settings, and Service Level Agreements (SLAs).

To access Service desk settings, in the management portal go to **Settings > Service desk**. These settings enable you to: |
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
|      | - Configure canned responses  
|      | - Set priorities  
|      | - Manage SLAs  
|      | - Define categories and subcategories  
|      | - Set default values  
|      | - Define default country and language settings  
|      | - Activate and deactivate statuses  
|      | - Define default RMM ticket integration settings  
|      | - Manage email templates and notification templates  
|      | - Define activities for time tracking  
|      | - Define external ticket integration settings |
| STEP 4: Define Billing and quoting settings | Billing and quoting settings enable you to fully customize your billing, including the layout of invoices, the default export format (if you then need to import into another system), the setting up of taxes, and much more. 

Note that billing information for end users should be specified in each customer’s settings or during the creation of sales items, contracts, and quotes.

To access billing and quoting settings, in the management portal go to Settings > Billing and quoting. These settings enable you to:

- Define and customize your billing
- Define and customize the look and feel of your quotes
- Define the taxes to be used |
| STEP 5: Add your customers and suppliers | In the management portal you can add and manage your customers, as and when required.

Note that in Acronis you can define different account types for customers, including partners, customers, prospects, and suppliers; these different types are referred to as tenants. For more information about the different types of tenant, see "User accounts and tenants" (p. 32).

To add partners, customers, and prospects in the management portal go to Clients. Then click + New and select the relevant tenant type. To add suppliers, go to Sales and billing > Company management and define the relevant details in the Suppliers tab.

For more information, see “Managing tenants” (p. 35). |
| STEP 6: Define your products | You can create a catalog of both non-recurring products or services and recurring (managed) services that you deliver to your customers, such as antivirus subscriptions or ad-hoc support. You can also make certain products available for sale directly in a support ticket, for example, when a customer logs a ticket to add an Office 365 subscription or needs additional memory. This helps save time on additional administrative processes.

To access products, go to Sales and billing > Sales, and click the Products tab. Users with the Administrator, Director, Finance, or Finance manager role can create products. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 7: Define contracts</strong></td>
<td>These products can then be used in contracts, tickets, quotes, sales items, etc. For more information, see &quot;Products&quot; (p. 205).</td>
</tr>
</tbody>
</table>
| STEP 7: Define contracts | Set up and define your contracts for customers carefully to ensure that Advanced Automation can:  
- Automatically provide periodic billing items and retainers, and enable user or device based billing where required.  
- Make the connection between configuration items, customers and the applicable SLA.  
- Automatically link a service, customer and configuration item to the applicable SLA in the service desk.  
- Automatically allocate new configuration items to the right customer, contract and SLA.  
To access contracts, go to Sales and billing > Sales, and click the Contracts tab. For more information, see "Working with contracts" (p. 194).                                                                                                           |
| STEP 8: Set up integrations with third party platforms | Set up your integrations with third party platforms. Advanced Automation currently supports:  
- **RMM**: NinjaOne, Datto RMM, Kaseya VSA, N-able N-Central, and N-able RMM  
- **Accounting**: FreshBooks, QuickBooks, Sage, Xero, and SnelStart  
- **VAR**: Microsoft CSP  
- **Payment**: PayPal and Stripe  
To access integrations, in the management portal go to Integrations. For more information, see "Integrating Advanced Automation with third party platforms" (p. 247).                                                                                                                     |
| STEP 9: Configure your email settings | This is the last step in setting up Advanced Automation. Before configuring your email settings, make sure you have first set up your email responses.  
Once you have configured your inbound email settings, Advanced Automation fetches all messages in your defined inbox and creates a ticket for each message (if relevant). When an email is processed, it is then moved to the 'archive' folder for future reference. If there is no 'archive' folder it is created for you.  
There are three email configurations to set up:  
- **Incoming email**: This is usually configured to have a help desk or support email account directly linked to the Advanced Automation service desk. Incoming emails are converted into tickets, and customizable responses sent to the end-user to keep them informed.  
- **Outgoing email**: The email server and account used to send or reply to messages.  
- **Invoice email**: The email server and account used to send invoices to customers.                                                                                                                        |
### Onboarding existing clients

When Advanced Automation is enabled for your account (see "Enabling Advanced Automation" (p. 155)), you need to onboard your existing clients in order to bill and process their service requests.

To ensure you have Advanced Automation configured correctly for your existing clients, do the following:

- Provide billing information for existing clients.
- Create contracts in order to start billing existing clients for your services and products.
- Ensure you can receive and process service desk tickets for existing clients.
- Ensure you can create sales items for existing clients.
- Ensure you can run the billing process and issue invoices for existing clients.

### Provide billing information

If Advanced Automation is enabled, when you access the **Clients** section you will be prompted to submit billing information for your existing clients. Billing information ensures you can use Advanced Automation to bill and process service requests for your clients.

**Note**

If billing information is not provided for a client, you cannot approve client tickets and time registrations, and you will be prompted when processing these tickets and requests to enter the information for the specified clients. Similarly, when creating a sales item, you will be prompted to complete billing information for the selected client if they do not have the information defined in Advanced Automation. See the relevant sections below for more information.

**To add billing information for existing clients**

1. In the management portal, go to **Organization > Clients**.
2. Click the ellipsis icon (...) next to the relevant client name. In the displayed menu, select **Add billing information**.
   
   Or
   
   Click on a client row from the displayed list. In the displayed sidebar, click the **Configure** tab.
   
   Then click on the **Billing** and **Address** sections to add the relevant billing information.
3. Complete the fields shown in the displayed form. For more information about these fields, see "Defining billing information for a tenant" (p. 39).
4. Click **Add** to complete the billing information setup.
Create contracts to start billing existing clients for services and products

Contracts ensure you can use Advanced Automation to bill your clients on a regular basis.

If Advanced Automation is enabled, when you access the Sales and billing module you are prompted to create contracts for your existing clients. This prompt is displayed only if one or more clients have Acronis services or products assigned.

To create contracts for existing clients

1. In the management portal, go to Sales and billing > Sales.
2. If the displayed banner informs you that a specified number of clients do not have contracts assigned, click Create.
   Alternatively, if you previously closed this banner, click the Create contracts for existing customers link, located in the top right of the screen.
3. In the Create new contract wizard, do the following:
   a. Select the relevant client, and click Next.
   b. Add contract information, including payment details and the contract period. For more information, see "Working with contracts" (p. 194). When done, click Next.
   c. Add billing information, and click Next. Note that if you have already defined billing information, as described in "Provide billing information" (p. 160), this step is not displayed.
   d. Add contract parts, as required. For more information, see "Creating a new contract" (p. 194). By default contract parts based on Acronis services already assigned to the client are added to the contract template. These contract parts can be edited or deleted, as required. Ensure you set the correct prices for the contract parts.
4. Click Done. The contract is added to the list of existing contracts in the Contracts tab.

Ensure you can receive and process service desk tickets for existing clients

If Advanced Automation is enabled, you can receive and process tickets for an existing client even if billing information is not defined for that client. This ensures you can create, respond to, resolve and close tickets as required. For more information about working with the service desk features, see "Service desk" (p. 169).

However, you cannot approve a client's reported ticket time if billing information is not provided for that client. When you attempt to approve ticket time registrations, you are prompted to add billing information for the relevant clients; for more information, see Provide billing information.
Ensure you can create sales items for existing clients

If Advanced Automation is enabled, you can create sales items for an existing client even if billing information is not defined for that client.

However, when creating a sales item (see "Managing sales items" (p. 192)), if you select a client without billing information specified, you are prompted to provide the billing information before proceeding with the creation of the sales item.

In addition, when editing an existing sales item, you cannot change the existing client assigned to the sales item to a client without billing information specified. You are prompted to provide the billing information before proceeding with the editing of the sales item.

Ensure you can run the billing process and issue invoices for existing clients

On the first billing run you are prompted to verify the default invoice numbering settings before generating invoices; created invoices must have numbers aligned with your accounting software. This step ensures that you have correctly setup your billing and invoicing information. For more information, see "Invoices" (p. 201).

Working with custom fields

By defining custom fields, you can store additional (optional) information for customers, products, sales items, contracts and contract parts, and tickets. Custom fields are listed under a new **Additional information** section in the relevant entity.

For example, you can add custom fields that are applicable to customers. When creating or editing a customer, you can complete these pre-defined custom fields in the **Additional information** section, which are then added to the customer’s details.

This section describes how to add a new custom field, and how to edit or remove an existing custom field.

---

**Note**

This feature is only available for users assigned the Administrator role.

Creating a custom field

**To create a custom field**

1. In the management portal, go to Sales and billing > Company management, and click the Custom fields tab.
2. Click + New custom field.
3. Define the following:
   - In the Name field, enter a name for the custom field.
   - In the Type field, select the relevant type of field from one of the following:
     - String
     - Integer
     - Boolean
     - Text
     - Date
   - In the Required column, click the option switch to Yes if you want the field to be mandatory.
   - In the Apply to field, select the relevant entity the custom field will be applied to:
     - Customer
     - Product
     - Contract
     - Contract part
     - Sales item
     - Ticket
   - In the Status column, select from Active or Inactive.
   - In the Sort number column, enter a numeric value that defines the display preference for the custom field. This is relevant when you have a number of custom fields in a displayed form; the lower the number, the higher the custom field is displayed.
4. Click Create custom field to add the new custom field.

**Editing a custom field**

This section describes how to edit or remove an existing custom field.

**To edit a custom field**

1. In the management portal, go to Sales and billing > Company management, and click the Custom fields tab.
2. Click the row of the custom field you want to edit.
3. Edit as required. For more information about the editable fields, see "Creating a custom field" (p. 162).
4. When done, click ✓.

**To remove a custom field**

In the Custom fields tab, click the ellipsis icon (...) in the row of the custom field you want to remove, and then click Remove.

The custom field is removed from the Custom fields tab, and is no longer shown in the Additional information section in the relevant entity.
Managing your users

After you have enabled Advanced Automation (see "Enabling Advanced Automation" (p. 155)), your existing users are automatically assigned roles to have immediate access to Advanced Automation features. Note that, by default, company administrators are granted the Administrator role; all other users are assigned the Engineer role, but this can be updated as required.

You can also add users and user groups, as required. Note that when you assign a user with an Advanced Automation role, they are automatically assigned to the default user group. User group settings can be updated in the Settings section (see "Service desk settings" (p. 212)).

For more information about creating your Advanced Automation users in the management portal, see "Creating a user account" (p. 52).

Managing user groups

Users assigned with the Administrator or Director role can manage user groups within their organization.

To add a new user group to your organization

1. In the management portal, go to Sales and billing > Company management, and then click the User groups tab.
   The displayed list shows your active and inactive groups, and how many users are in each group. These groups can be edited or activated/deactivated, as described below.
2. Click + New.
3. Enter a User group name.
4. Select the Group manager.
5. Select the Active check box to activate the group.
6. Select the relevant users from the Users list (on the right). Then click the left arrow icon to add the users to the Group members list.
7. Click Create new group.

To update a user group

1. In the User groups tab, click on the group you want to update.
2. In the right sidebar, click the pencil icon to edit the user group. In addition to updating the group name and manager, you can also edit group members and activate/deactivate the group by selecting/clearing the Active check box.
3. When done, click ✓.

To delete a user group

1. In the User groups tab, click on the group you want to delete.
2. In the right sidebar, click the trash can icon.
   The user group is deleted.
Note
You can only delete a user group if it is currently Inactive, and if all users are assigned to another Active group. In addition, the group must not be used in any Advanced Automation settings, such as the service desk default settings or quote settings.

**Advanced Automation roles**

Advanced Automation includes a number of roles, which can be assigned to your users as required. When you enable Advanced Automation (as described in "Enabling Advanced Automation" (p. 155)), all your existing users are automatically granted access to the functionality in Advanced Automation. During the account creation process, you can assign the relevant role to each user. Note that, by default, management portal administrators are granted the Administrator role, and read-only administrators are granted the Engineer role.

To update the role at a later date, go to Company management > Users, select the relevant user, and in the Services tab, update the role. In the same tab, you can also disable the Advanced Automation functionality for that specific user.

The table below describes each of the available roles, and the rights assigned to each role within Advanced Automation:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineer</td>
<td>The default role applied to all users. Includes access to the Service desk and Project management modules plus time tracking functionality. This role also includes limited access to customer details and their end users.</td>
</tr>
<tr>
<td>HR</td>
<td>Includes limited access to the Service desk, Project management, Reports and Time management modules.</td>
</tr>
<tr>
<td>Finance</td>
<td>Includes access to the CRM, Sales and billing, Service desk, Project management, plus time tracking functionality. This role also includes limited access to client's financial statistics and no access to company reports.</td>
</tr>
<tr>
<td>Sales</td>
<td>Includes access to the CRM, Sales, Service desk, and Project management modules, plus time tracking functionality. This role also includes limited access to invoices data and no access to company reports.</td>
</tr>
<tr>
<td>Group manager</td>
<td>Includes access to the CRM, Service desk, and Project management. This role also includes full access to client’s financial statistics, company reports, and Time management functionality, as well as limited access to the Sales module.</td>
</tr>
<tr>
<td>Finance manager</td>
<td>Includes access to the CRM, Sales and billing, Service desk, and</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Project management</td>
<td>This role also includes full access to client's financial statistics and company reports, and Time management functionality.</td>
</tr>
<tr>
<td>Director</td>
<td>Includes access to all modules but without the capability to manage global company settings.</td>
</tr>
<tr>
<td>Administrator</td>
<td>Full access rights and the capability to manage global company settings for the Service desk, Billing and Invoicing.</td>
</tr>
</tbody>
</table>

The following roles are available for your customer's users (select the relevant customer, and then go to Company management > Users). When users are first added, their status is Inactive and an invitation email is sent to the user. You can activate or deactivate their access to Advanced Automation at any time.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>Includes access to the Service desk module (limited to within a customer's organization).</td>
</tr>
<tr>
<td>Client manager</td>
<td>Includes access to the Service desk, Invoices, and Reports modules (limited to within a customer's organization).</td>
</tr>
</tbody>
</table>

**Configuring your email settings**

Advanced Automation has a built-in email parser to convert incoming email to tickets. To use this feature, ensure you use a dedicated email account or test email account. In addition, note the following:

- Do not use a personal email account with the same address as an Cyber Protect Cloud user account.
- All unread messages that the system finds in the inbox will be converted into tickets.
- Tickets cannot be assigned to users that are not present in Cyber Protect Cloud as there can be no association with an email address.
- Once an email message is processed, Advanced Automation moves it to an archive folder (it is not deleted):
  - If there is no archive folder, it is created.
  - If you are using a mail server other than Office365 or Gmail, ensure it supports RFC 6851.

To access the mail server settings, go to Settings > Service desk > Mail server configuration.

**Note**

The configuration of the mail server for outgoing invoices and incoming tickets is only available when the Advanced Automation service is enabled. This functionality is also accessed when first onboarding with Advanced Automation, as described in "Enabling Advanced Automation" (p. 155).
Defining outgoing email settings

Note
Contact your email administrator for your server setup details.

1. Go to Settings > Service desk > Mail server configuration. In the Configure email server screen, the Outgoing email settings tab is displayed by default.
2. Click the Active option switch to enable outgoing email.
3. Select the relevant mail server protocol type from one of the following:
   • SMTP (default)
   • Exchange
   • Office365
4. To enable SSL, select the Enable SSL check box. Secure Sockets Layer (SSL) encrypts your email messages during transport and is only supported in these scenarios:
   • Secure (TLS) - StartTLS - Port 587
   • Secure (SSL) - SSL - Port 465
5. Enter the host name and its port.
6. Enter the account username and password.
7. In the From field, enter the account username. If you selected the Office365 protocol type, note that it supports alias email addresses in a single mailbox. When you want to use any of these addresses as the sender address, use this field. Only email addresses that are associated with the Office365 account are used. The system does not spoof any addresses.
8. Enter the Timeout value in milliseconds. This value specifies how long the system waits for a successful connection to your email server before it times out. Note that if you are using SMTP as protocol type, select the Requires Authentication check box.
9. Click Test Connection to verify your outgoing email settings. Once the system validates all your settings, a confirmation message is displayed.
10. Click Save to apply your settings.
    You can also define settings for the invoice emails you send to customers (see "Defining outgoing invoice email settings" (p. 167)) and incoming email settings (see "Defining incoming email settings" (p. 168)).

Defining outgoing invoice email settings

Note
Contact your email administrator for your mail server setup details.

The invoice email settings enable you to configure your mail server to send invoices to your customers.

To define your invoice email settings
1. Go to Settings > Service desk > Mail server configuration.
2. In the Configure email server screen, click Invoice email.
3. Click the Active option switch to enable outgoing invoice emails.
4. Select the relevant mail server protocol type from one of the following:
   - SMTP (default)
   - Exchange
   - Office365
5. To enable SSL, select the Enable SSL check box. Secure Sockets Layer (SSL) encrypts your email messages during transport; SSL is only supported in these scenarios: Secure (TLS) – StartTLS – Port 587Secure (SSL) – SSL – Port 465
6. Enter the host name and its port.
7. Enter the account username and password.
8. In the From field, enter the account username. If you selected the Office365 protocol type, note that it supports alias email addresses in a single mailbox. When you want to use any of these addresses as the sender address, use this field. Only email addresses that are associated with the Office365 account are used. The system does not spoof any addresses.
9. Enter the Timeout value in milliseconds. This value specifies how long the system waits for a successful connection to your email server before it times out. Note that if you are using SMTP as protocol type, select the Requires Authentication check box.
10. Click Test Connection to verify your outgoing email settings. Once the system validates all your settings, a confirmation message is displayed.
11. Click Save to apply your settings.
   You can also define settings for outgoing emails (see "Defining outgoing email settings" (p. 167)) and incoming email (see "Defining incoming email settings" (p. 168)).

Defining incoming email settings

Note
Contact your email administrator for your mail server setup details.

The incoming email settings enable you to configure your mail server to receive emails from your customers. Advanced Automation automatically converts these emails into tickets and assigns them to the relevant user or company.

Important
When email integration is activated, Advanced Automation manages the inbox for the specified account. Any unread messages are automatically processed and moved to the Archive folder.

To define your incoming email settings
1. Go to Settings > Service desk > Mail server configuration.
2. In the Configure email server screen, click Incoming email.
3. Click the Active option switch to enable incoming emails.
4. Select the relevant mail server protocol type from one of the following:
   - IMAP (default)
   - Exchange
   - Office365

5. To enable SSL, select the **Enable SSL** check box. Secure Sockets Layer (SSL) encrypts your email messages during transport; SSL is only supported in these scenarios: Secure (TLS) – StartTLS – Port 587Secure (SSL) – SSL – Port 465

6. Enter the host name and its port.

7. Enter the account username and password.

8. Enter the **Timeout** value in milliseconds. This value specifies how long the system waits for a successful connection to your email server before it times out.

9. Select the **Process messages from unknown senders** check box to ensure messages from unknown senders will be converted, but the tickets will not be automatically assigned to a user or company. If not selected, when an email comes in from an address that is not in the customer database, the message is not converted into a ticket.

10. Select the **Do not process messages received before the specified date** check box to ensure that tickets are created for emails received after a specified date only. This option prevents tickets from being automatically created for all existing emails, including those received prior to defining your incoming email settings. When the check box is selected, additional date and time fields are displayed.

11. Click **Test Connection** to verify your incoming email settings. Once the system validates all your settings, a confirmation message is displayed.

12. Click **Save** to apply your settings.
   
   You can also define settings for the invoice emails you send to customers (see "Defining outgoing invoice email settings" (p. 167)) and other outgoing email settings (see "Defining outgoing email settings" (p. 167)).

Managing your service desk and time entries

The **Task management** module of Advanced Automation is where you manage your service desk and time entries.

- **Service desk**: Manage customer service requests, and plan and track service activities.
- **Time entries**: Manage your time registrations, approve ticket time for billing, request a day off, and approve holidays as an admin user or manager.

**Note**

You can also use the dedicated but more limited mobile application ("Acronis Advanced Automation", which can be downloaded from the App Store and Google Play Store), to work with service desk tickets and time entries.

**Service desk**

The **Service desk** module enables you to create, update, and schedule your tickets.
To access the Service desk functionality, in the management portal go to **Task management > Service desk**. From the two displayed tabs (**Tickets** and **Scheduler**), you can view the entire organization's tickets and their statuses, including customer ratings. You can also:

- Create new tickets
- Review and update current tickets
- Merge tickets
- Create and modify custom ticket filters
- Schedule tickets
- Export ticket data

**Note**
Users assigned with the Client manager or Client roles have limited access to the above service desk functionality. They can review, create and modify tickets (with some limitations, as described in the Customer Administrator's guide). They can also export ticket data as required, but cannot schedule or merge tickets.

**The ticket creation process**

Advanced Automation creates and updates service desk tickets upon recognizing the email address in any emails forwarded to the Advanced Automation mail parser.

Note that you can configure incoming and outgoing email server settings, as required (see "Configuring your email settings" (p. 166)).

**New service desk tickets are created when:**

- A new unread email from a new thread is identified.
- A new unread email from an existing email thread is identified, but an associated ticket is already closed.
- A user is identified by their email address.
- A user is not identified by their email address, but incoming email settings (see "Defining incoming email settings" (p. 168)) allow tickets to be submitted by unknown senders.
- Tickets can also be manually created, as described in "Creating a new ticket" (p. 171).

**Note**
When a user is identified by their email address, a new ticket is also associated with the user's company, default SLA, default priority, default category, default support user, and any devices linked with this specific user.

**Existing tickets are updated when:**

- An unread email from an existing email thread is identified and the corresponding ticket is not closed.
- Tickets can also be manually updated, as described in "Updating tickets" (p. 173).
Creating a new ticket

In addition to the automatic creation of tickets by Advanced Automation (see "The ticket creation process" (p. 170)), you can also manually create a ticket, as described below.

**Note**
When creating or editing a ticket, many values are pre-filled with the default Service desk settings. These settings can be updated as required, as described in "Service desk settings" (p. 212).

**To create a new ticket**

1. Go to Task management > Service desk. The Tickets tab, which lists all the organization’s current tickets, is displayed by default.

   ![Ticket List](image)

2. Click + New ticket. The Create new ticket dialog is displayed.

   ![Create New Ticket Dialog](image)

   **Note**
   When Advanced Automation is activated for your account, you can also click New > Client ticket from the management portal toolbar at the top of the screen, even when you are not in the Service desk module. This option automatically opens the Create new ticket dialog via which you can create a ticket, as described in the following steps.

3. In the header row, the ticket timer is displayed. This timer can be paused and started as required by users working on the ticket. Note that you can also set the ticket timer to automatically pause if the user navigates away from the ticket screen (see "Setting default values" (p. 217)).

   ![Ticket Timer](image)

In addition to the ticket timer, you can also select the following check boxes, as required:

- **Billable**: Selected by default, this option defines if the ticket is billable. Depending on the SLA applied to the ticket (see the steps below), the check box can also be selected or cleared; for example, if the SLA is of the Subsequent calculation type, the check box will be selected (to ensure the work reported on the ticket is billable). If the SLA is of the Fixed price type, the check box is cleared (to ensure any work on the ticket is not billable).

- **Email the customer**: Selected by default, this option defines if ticket updates are emailed to the end user.
4. Define the following:
   • In the **Ticket title** field, add the title for the ticket.
   • In the **Customer information** section, add the customer details, including the relevant end user who requested the ticket and their manager. Click the **End user** field to select the user from the displayed list; the other fields are auto-populated where relevant.
   • In the **Configuration item or service** section, select one of **Managed service** or **ICT service**:
     - **Managed service**: This option is selected and pre-filled with the relevant details if the Managed service product type is available in the contract. When selected, find the contract part to which the device is assigned, and then verify the SLA on that contract part and apply it to the ticket. Note that if there are no Managed service product types in the contract, this option is disabled.
     - **ICT service**: This option is selected and pre-filled with the relevant details if the ICT (information and communication technology) service product type is available in the contract. When selected, the SLA from the ICT service contract part is applied to the ticket. Note that if there are no ICT service product types in the contract, this option is disabled.
     - The **Configuration item** field shows devices that are linked to the selected Managed or ICT service (Unknown CI is shown if there are no integrations or the device is unknown); selecting a device after selecting a service is optional (when you select a device in this scenario, the SLA does not change but remains the SLA that belongs to the service).
     - If the configuration item has been linked to a specific user (see “Viewing configuration items” (p. 240)), the relevant device is automatically associated with the ticket when the ticket is created.

   **Note**
The listed devices include those with Acronis products and services (for example, Cyber Disaster Recovery Cloud, and Cyber Protection), and RMM integrations. If the Acronis product or RMM integration provides a remote control option for a listed device, you can connect remotely from the ticket using the RDP protocol or HTML5 client.

   • In the **Priority** and **SLA** fields, select the relevant ticket priority and SLA.
   • In the **Support agent** section, select the relevant user to be assigned to the ticket. You can also select a **Category** for the ticket and **Support group** if relevant.
   • In the **Ticket description** section, you can:
     - Select the relevant **Status** for the ticket (**New** is displayed by default).
     - Add rich text descriptions and comments (including images and other media files, up to a maximum of 25 MB) in the displayed text box. Any of the following formats and types can be added or dragged and dropped into the text box:
       - Media: .avi, .mp4, .mp3
       - Emails: .eml, .msg
       - Images: .png, .gif, .jpeg, .jpg, .heic, .bmp, .tiff, .svg
       - Document and log files: .doc, .docx, .xls, .xlsx, .ppt, .pptx, .txt, .log, .pdf
       - Archives: .zip, .rar
In the **Canned response** field, click to select a predefined canned response. Note that if you select a canned response, it replaces the rich text description and comments (see the previous bullet). For more information about defining canned responses, see "Creating a canned response" (p. 213).

In the **Billing activity type** field, click to select the relevant product name. Note that only products with the attribute **Product for activity-based ticket billing** assigned to them are available.

Note that the **Ticket description** section can be set to mandatory in the Service desk settings (see "Service desk settings" (p. 212)).

- Select the **Schedule ticket** check box to schedule the ticket with the relevant starting time and date, and duration. See also "Scheduling tickets" (p. 175).
- In the **Attachments** section, click to add any relevant attachments.
- In the **Billable items** section, click to add the relevant ticket products that should be linked to the ticket.
- In the **Internal notes** section, click to add notes and actions.

5. Click **Create**. When the ticket is generated, it is added to the **Tickets** tab.

---

**Note**

Once you have created tickets, you can export your ticket data at any time by clicking **Export** in the **Tickets** tab. An Excel file is automatically downloaded to your workload.

---

### Updating tickets

**To update a ticket**

1. Go to **Task management > Service desk**. The **Tickets** tab is displayed by default.
2. (Optional) If you have a large number of tickets, use the filter to locate the relevant ticket(s).
   
   Click **Filter** (or **Saved filters** if you have previously defined a filter), and select the relevant values from the displayed fields. Note that you can click the **Add to Saved filters** option switch to save the defined filter for future use. Advanced Automation also comes with a number of predefined filters, which can be selected as required.
   
   Alternatively, use the **Search** bar to locate the relevant ticket(s).
3. Click the Ticket row link in the **Tickets** tab.
   
   To bulk edit a number of tickets, select the relevant tickets in the **Tickets** tab and then click **Bulk edit**. The changes you make are applied to all the selected tickets.
   
   To open a specific ticket in a new browser tab, click ![Open in new tab](open_in_new.png).
4. Modify the ticket as required in any of the displayed tabs:
   
   - **Activities**: Displays recent activity on the ticket, including the current status, and comments made on the ticket. You can also merge the ticket (see "Merging tickets" (p. 177)) and schedule the ticket (see "Scheduling tickets" (p. 175)) in this tab.
   
   Note that in this tab you can change the status of the ticket. For example, change it to **In progress** when you start working on it, or move it to **Closed** when it can be closed. When the
status is changed to **Closed**, a ticket rating request email is sent to customers. For more information, see "Receiving customer feedback on tickets" (p. 177).

You can also modify any previous updates to the ticket, which are listed at the bottom of the **Activities** tab. Click the arrow icon next to the relevant ticket update, and in the expanded section, click the pencil icon to modify the duration and/or existing comments.

---

**Note**

If you change the status of a ticket that was created by an alert in the Cyber Protect console to **Closed**, the alert in the Cyber Protect console is also closed.

---

- **Overview**: Displays general ticket settings and customer details and contacts that can be modified as required. For more information, see "Creating a new ticket" (p. 171).

  You can change devices linked to a ticket; for example, if a ticket is created that does not include the correct device, you can click on the **Configuration item** drop-down list to select the relevant device.

  Alternatively, you can click **Open remote desktop** to remotely connect to the selected device or **Go to device** to view additional options available for the currently linked device. These options include access to the integrated RMM platform where applicable:

  - **Active issues view**: This opens an external list of issues in the RMM platform.
  - **Device Page - Status Tab**: This opens an external RMM page with the device's general information.
  - **Device Page - Properties Tab**: This opens an external RMM page with the device's properties.

---

**Note**

Only Datto RMM, N-able N-Central, and N-able RMM integrations currently support the option to remotely connect to the selected device. For devices managed by the Acronis platform (for example, with an Acronis agent), you can navigate directly to the linked device's details from a ticket and review its details, initiate a remote connection (if applicable and allowed for the device), manage the device, and so on.

---

- **Billable items**: Displays any billable items applied to the ticket, which can be updated as required. Products can be added to the ticket and once the ticket is closed and its time is processed, a sales item is automatically created for these products.

  This functionality enables you to bill customers for extra activities and services as part of the ticket. For example, advisory services charged per hour, network cables, or software licenses. Sales items can be billed in the standard way.

  Note the following:

  - Only products defined as **Ticket products** (in the product's settings) can be added to tickets as additional billable items.
  - You need to select the product, its price, and its quantity.
  - Engineers cannot change the standard product price if the **Price adjustable by engineer** check box is not selected in the product's settings.
- **Internal info**: Displays any internal notes or actions that have been applied to the ticket. You can add notes or actions, as required.
- **Last tickets**: (Read only) Displays the last three tickets from the specific user, and the last three tickets from the customer.

**Note**
The Billable items, Internal info, and Last tickets tabs are not displayed to users assigned the Client manager or Client roles.

For more information about the various fields available when editing a ticket, see "Creating a new ticket" (p. 171).

5. Click **Save changes**.

### Scheduling tickets

The **Scheduler** tab displays all tickets that are scheduled for you, and, if you are assigned the Group manager role, for your team. Using this tab, you can easily identify tickets allocated per day and change the view to a monthly, weekly or daily format. You can also schedule tickets for yourself or, if you are a Group manager, schedule tickets for your group.

You can also schedule a ticket from within the ticket itself, as described below.

The **Scheduler** tab also enables you to add new time registrations and to sync the **Scheduler** tab with your Microsoft Outlook calendar. When your Outlook calendar is linked, you can also view Outlook events in the **Scheduler** tab. For more details, see "Adding a new time registration" (p. 180) and "Syncing your calendar with Microsoft Outlook" (p. 176).

**Note**
Advanced Automation has a built-in predictive ticket handling system. It keeps a six month record of the time spent per ticket category, which aggregates into an average handling time per ticket category. For instance, the system can track how much time your technicians spend on a ticket with category **workstation** and subcategory **install printer driver**. This information is shown on current tickets to calculate the time your team will need to process them. This is also done for individual users, with the calculated values also shown in the **Scheduler** tab.

**To schedule a ticket in the Scheduler tab**

1. Go to **Task management > Service desk**, and then click the **Scheduler** tab.
   
The displayed tab shows several types of events:
   - Time registrations made from tickets
   - Time registrations manually defined in this tab
   - Scheduled tickets
   - Third party calendar events
2. Select the relevant user from the **Support group** and **Support agent** drop-down lists. Note that these lists are only available to Group managers, and list the relevant users with shared calendars.

3. Click the required day and click **Schedule ticket**. The Schedule ticket dialog is displayed.

   ![Schedule ticket dialog](image)

4. Select the relevant user (the ticket owner).

5. Select the ticket that you want to schedule. Note that you can also select a ticket that has already been scheduled to reschedule it.

6. Set the date, time, and estimated duration of the ticket.

7. Click **Schedule**. You can now view the scheduled item that you just created.

   Note that you can update scheduled tickets and manual time registrations only.

   **To schedule a ticket from within the ticket**

   1. Go to **Task management > Service desk**, and create a new ticket (see "Creating a new ticket" (p. 171)) or locate the relevant ticket in the **Tickets** tab.

   2. When creating a ticket, click the **Schedule ticket** option switch to enable it. Then set the start hour and estimated duration of the ticket, and, after completing the rest of the required fields in the dialog, click **Done**.

      Or

      When scheduling an existing ticket, click the **Activities** tab of the relevant ticket, and then select the **Schedule ticket** check box. Then click **Save changes**.

   **Syncing your calendar with Microsoft Outlook**

   You can synchronize tickets in the **Scheduler** tab with Microsoft Outlook, and share your calendar with co-workers.

   **To sync tickets with Microsoft Outlook**

176
1. Go to **Task management > Service desk**, and then click the **Scheduler** tab.
2. Click **Calendar sync**.
3. Log in to your Outlook account and enable your calendar to synchronize with Advanced Automation.
4. Select the **Share the Calendar's synced content with everyone** option to share your calendar content with other Advanced Automation users.

### Merging tickets

When updating a ticket you can also choose to merge it with another existing ticket (which can be in any status but must be linked to the same customer and end user).

**To merge a ticket**

1. Go to **Task management > Service desk**.
2. In the displayed **Tickets** tab, select the relevant ticket to merge.
3. In the **Activities** tab, select the **Merge ticket** check box.
4. Select the relevant ticket from the list of available tickets, and click **Merge**.
5. In the displayed confirmation message, click **Merge**.

**Note**
The original ticket is no longer available, and will not be included in any active or closed ticket searches. However, any updates or time registrations included in the original ticket are added to the merged ticket.

### Receiving customer feedback on tickets

When a ticket's status is updated to **Closed**, Advanced Automation automatically sends a Ticket rating request email to the customer. This email is included by default in Advanced Automation, and can be customized as required (see "Managing email templates" (p. 219)). The email is sent only once.

When the customer receives the Ticket rating request email, as shown below, they can rate the ticket as required by clicking on the relevant star rating. Once clicked, they can also add comments. A confirmation message is then displayed to the customer, thanking them for their rating feedback.

To see customer feedback, go to **Task management > Service desk**, and locate and select the relevant ticket. In the displayed right sidebar, click the **Overview** tab to view the feedback.

**Note**
Customers can submit their ticket rating regardless of their access to Acronis management or Cyber Protect portals. In addition, they do not need access to the Advanced Automation service or have a specific Advanced Automation role.
Time entries

The **Time entries** module enables you to manage users’ time records and track their day-to-day activities.

To access the Time entries functionality, in the management portal go to **Task management > Time entries**. In the displayed **Time registration** tab, you can view all current time entries that are registered in Advanced Automation. In this tab and the additional Time entries tabs, you can:

- Add new time registrations
- View and modify existing time registrations
- Review and approve time registrations
- Request days off
- Add and review sick notices
- Review and approve PTO requests
- Export time registration data

**What are time entries / time registrations?**

Time can be registered in Advanced Automation in two ways:
- **Automatically**: Automatic time registrations are created as a result of someone working on a service desk ticket. The time worked on the ticket is captured automatically by a built-in ticket timer; it can also be modified by a ticket engineer.

- **Manually**: Manual time registrations are submitted by engineers manually. For more information, see "Adding a new time registration" (p. 180).

Proper and regular time registration enables you to increase your billable time. It also provides a good overview of your business metrics with Advanced Automation’s built-in reports, including time spent on a specific client, your engineers’ occupancy rates, and others.

**Viewing existing time registrations**

To view existing time registrations, in the management portal go to **Task management > Time entries**. In the displayed **Time registration** tab, you can view all current time registrations that are registered in Advanced Automation.

Information about each entry is displayed, including:

- The hours registered
- The specific user who performed the task
- The type of activity
- The customer
- If the time registration is billable or not
- A link to the relevant ticket (if relevant)

Time registrations are grouped by date, and the total hours for each day is displayed.

To export time registration data, select the relevant time registrations and then click **Export to XLS**. An XLS file called **Time registrations** is downloaded to your workload.

You can also filter and sort the displayed list to locate a specific time entry; for more advanced filtering, use the **Filter** tool to define which time entries should be displayed.

<table>
<thead>
<tr>
<th>Date</th>
<th>Hours</th>
<th>Description</th>
<th>User</th>
<th>Activity</th>
<th>Customer</th>
<th>Billable</th>
<th>Ticket ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday 03 Apr 2022</td>
<td>3.5 h</td>
<td>Time reg description text</td>
<td>Ronald Richards</td>
<td>Ticket time</td>
<td>Royal Bank of Scotland</td>
<td></td>
<td>Ticket 201800302-27</td>
</tr>
<tr>
<td>Friday 02 Apr 2022</td>
<td>3 h</td>
<td>Time reg description text</td>
<td>Theresa Webb</td>
<td>Ticket time</td>
<td>Royal Bank of Scotland</td>
<td></td>
<td>Ticket 201800302-27</td>
</tr>
<tr>
<td>Tuesday 28 March 2022</td>
<td>2 h</td>
<td>Time reg description text</td>
<td>Devon Lane</td>
<td>Ticket time</td>
<td>ADME Corporation</td>
<td></td>
<td>Ticket 201800302-11</td>
</tr>
<tr>
<td>Wednesday 27 March 2022</td>
<td>2 h</td>
<td>Time reg description text</td>
<td>Jerome Bell</td>
<td>Bookkeeping</td>
<td>ADME Corporation</td>
<td>Not billable</td>
<td>Ticket 201800302-11</td>
</tr>
<tr>
<td>Wednesday 27 March 2022</td>
<td>1 h</td>
<td>Time reg description text</td>
<td>Courtney Jones</td>
<td>Project management</td>
<td>ADME Corporation</td>
<td>Billable</td>
<td>Ticket 201800302-11</td>
</tr>
<tr>
<td>Thursday 28 March 2022</td>
<td>1.5 h</td>
<td>Time reg description text</td>
<td>Jenny Wilson</td>
<td>Lunchtime</td>
<td>ADME Corporation</td>
<td>Not billable</td>
<td>Ticket 201800302-11</td>
</tr>
<tr>
<td>Thursday 28 March 2022</td>
<td>30 min</td>
<td>Time reg description text</td>
<td>Colleen Robertson</td>
<td>Ticket time</td>
<td>Just Right Tax Advisor</td>
<td></td>
<td>Ticket 201800302-12</td>
</tr>
</tbody>
</table>
Adding a new time registration

By manually adding a new time registration you can log the time spent working on tickets. This enables you to see what engineers are spending their time on, and, combined with Advanced Automation's other metrics and reports, determine the relevant resources required for specific projects.

To add a new time registration

1. Go to Task management > Time entries. The Time registration tab is displayed by default.
2. Click + New. The following dialog is displayed.

   ![Create new time registration dialog](image)

3. Define the following:
   - Activity: Select the relevant activity from the Activity drop-down list. For more information about activities, see "Defining activities for time tracking" (p. 238).
   - Customer: Select the relevant customer from the Customer drop-down list. You can select your own organization, which will make this entry not billable. To register work for a specific client, enter the client name.
   - Group: Select the relevant group (the department you are making the registration for) from the Group drop-down list. Only groups in which you are included are displayed.

Note

When Advanced Automation is activated for your account, you can also click New > Time registration from the management portal toolbar at the top of the screen, even when you are not in the Time entries module. This option automatically opens the Create new time registration dialog via which you can create a time registration, as described in the following steps.
• **Project**: Select the relevant project from the Project drop-down list. This option is only available if you are assigned to a project team.

• **Project step**: Select the relevant project step from the Project step drop-down list. This option is only available if you are assigned to a project team and steps in the project are not closed.

• **Date**: Define the relevant date.

• **Time period**: Define the length of the time registration (in hours and minutes).

• **Description**: Enter a description for the activity.

• **Billable**: Click the Billable option switch to register this activity as billable. This option is only available if you have selected a customer.

---

**Note**
When creating a new time registration, the User field is automatically filled with your name.

---

4. Click **Create**.

---

**Editing a time registration**

**Note**
You can only edit a time registration if it has not been processed. For more information about the processing of time registrations, see "Approving time registrations for billing" (p. 182).

---

**To edit a time registration**

1. Go to Task management > Time entries. The Time registration tab is displayed by default.
2. Click on the time registration that you want to edit.
3. In the right sidebar, click the pencil icon to edit the time registration. For more information about the available fields, see "Adding a new time registration" (p. 180).
4. When done, click ✓.

---

**Billable time registrations**

Advanced Automation includes two main billable time entry scenarios:

• Automatic time registration when working on generic tickets and alert tickets.

• Manual time entries.

**Note**
Regardless of the time entry scenario, the MSP administrator ultimately determines if time is billed or not. This means that any of the selections in the sections below can be overruled, as required.

---

For more information about working with sales items, see "Managing sales items" (p. 192).

**Automatic time registration when working on generic tickets and alert tickets**

Note the following:
• This time can be non-billable when the applicable SLA has the **Fixed price** option enabled (in an "all-in" SLA); this time can be billable when the applicable SLA has the **Subsequent calculation** option enabled.

• The billing rate can be based on several scenarios:
  ◦ Default billing rate for office hours work.
  ◦ Default billing rate for outside office hours work if the timestamp of the ticket update is outside the SLA coverage timeframe.
  ◦ Specific billing rate for the customer (custom pricing).
  ◦ Specific billing rate based on the work types in the ticket. For example, Update 1 in the ticket is for 1 hour of standard support work, and Update 2 in the ticket is for 1 hour and the 'Network engineering' activity type is selected in the ticket. The end result is that the customer is billed for two different rates; note however, that billing rates can be overruled by custom pricing settings.

**Manual time entries**

This time can be marked as billable time. A specific billing rate can be configured for each manual time registration activity type. Note that this rate can be overruled by custom pricing settings (for more information, see "Working with custom prices" (p. 200)).

**Approving time registrations for billing**

You can approve the following time registrations recorded in Advanced Automation and listed in the **Approve time** tab:

• Time registrations not yet approved, meaning reported ticket time from tickets that are in the **Closed** state only, or for manual time registrations.

• Time entries that meet the threshold of the minimal time spent on a ticket (which is defined in the billing settings, see "Billing settings" (p. 241)). For example, if the threshold is set to 5, time entries with less than five minutes are not listed.

---

**Note**

Time registrations can only be approved by users with the following roles: Administrator, Director, Group manager, Finance manager

Each listed time registration includes the full details of each activity and also enables you to process and bill the associated customers. You can approve single or multiple time registrations as billable to customers; alternatively, you can define time registrations as pending, or non-billable.

---

**Important**

You cannot approve a customer's reported ticket time if billing information is not provided for that customer. When you attempt to approve ticket time registrations, you are prompted to add billing information for the relevant customers. For more information, see Provide billing information.

---

**To approve a time registration**
1. Go to **Task management > Time entries**. Then click the **Approve time** tab.

   The list of time registrations awaiting approval is displayed. Information displayed includes the customer, the date and title of the time registration, and its duration.

   **Note**

   If ⌂ is displayed next to the Duration column, this indicates some of the registered time was recorded beyond the time frame of the relevant SLA. For more details about learning what time was billed, follow the steps below.

2. (Optional) To verify the details of a specific time registration, select the relevant row. The details for the selected time registration are displayed in the right sidebar:

   • You can click **Process** to create a sales item for this time registration and **View ticket** to see the actual ticket. See Step 4 for details of how Advanced Automation handles the time registration when clicking **Process**.

   • In the **Overview** section, you can view general details for the time registration. You can also edit the information, and enable the **Block hours** option switch (if block hours are enabled on the contract level, such as an agreement for "all-in" support work for 20 hours per month). If there is an available balance of block hours (such as unused support hours), the time registration is deducted from this balance without creating an extra sales item. You can redefine this default rule as required, and still bill for the recorded time if needed.

   • In the **SLA billable time** section, you can see the actual customer's round-up time value (in minutes) that will be used to round up the total billable time. You can view and edit the total rounded time per billing rate. For example, you can select the relevant billing rate and manually adjust the final billable time.

   • In the lower section of the sidebar, you can review details of the ticket's time registrations, if required. For each time registration the following details are available:

     ◦ The user that made the time registration.
     ◦ The user's support group name.
     ◦ The date and time of the time registration.
     ◦ The user's hourly rate.
     ◦ A description of the time registration.

3. After verifying or editing the time registration, click in the relevant row and select from one of the following options in the **Approve time** tab:

   • **Billable**: Select this option to bill the relevant customer and to generate an invoice.

   **Note**

   Advanced Automation automatically pre-selects whether a ticket is to be billed based on the SLA (you can override this by selecting the relevant option). When a manual time entry is marked as **Billable** during its creation (see "Creating a new ticket" (p. 171)), Advanced Automation marks it as **Billable** in the **Approve time** tab. If required, you can change the billing option to **Pending**.

   • **Not billable**: Select this option if you do not want to bill the selected time registration.
- **Pending**: Select this option to keep the time registration in the list after processing any billable items.

You can also select multiple time registrations, as required. When selected, the relevant action buttons are enabled above the list of time registrations. Select from **Mark as billable, Mark as not billable, Mark as pending**, or **Process** (see the following step).

4. Click the **Process** action button to process the selected time registrations.

   If a time registration was set as **Billable**, a sales item is created with the relevant company details for the customer. In addition, if there are multiple time registrations selected, multiple rows are added to the sales item. The generated invoice includes the ticket title, ticket number, and billable time based on the applicable rate.

   If a time registration was set as **Not billable**, it is removed from the **Approve time** tab.

   If a time registration was set as **Pending**, it remains in the **Approve time** tab.

**Requesting days off**

You can view and update your day off requests in the **Request day off** tab. This tab displays all the day off requests you have created and their details, including if they have been approved or not. You can also request additional days off, as required.

**Note**

Day off requests can only be made if the number of days in the **Days off per year** field for the relevant customer is defined. For more information, see “Setting default values” (p. 217).

**To request days off**

1. Go to **Task management > Time entries**, and then click the **Request day off** tab.
2. Click + **New**.
3. In the displayed dialog, select one of the following:
   - **Request one day off**: Select the relevant day, and time (by default, eight hours is selected).
   - **Request multiple days off**: Select the relevant start and end dates.
4. Enter a description for the request, and click **Create**.

   If you requested multiple days off, one request is registered for each day.

**Note**

You can also edit day off requests that are awaiting approval (click on the relevant row in the list of requests and then edit as required). When the request has been approved or declined, it cannot be edited.

**Creating a sick notice**

You can view and update all sick notices waiting approval in the **Sick notice** tab. You can also create a new sick notice for any user in your account.
Note
Sick notices can only be created by users with the following roles: Administrator, Director, Group manager, Finance manager, HR

To create a new sick notice

1. Go to Task management > Time entries, and then click the Sick notice tab.
2. Click + New.
3. In the displayed dialog, define the following:
   - User: Select the user that you want to create the sick notice for.
   - Request one day: Select the relevant day, and time (by default, eight hours is selected).
   Or
   - Request multiple days: Select the relevant start and end dates.
4. Enter the sick notice description and click Create.
   If you requested multiple sick days, one request is registered for each day.

Note
You can also edit sick notice requests that are awaiting approval (click on the relevant row in the list of sick notices and then edit as required). When the sick notice has been approved or declined, it cannot be edited.

Approving PTO and sick leave requests

You can view and update PTO and sick leave requests from all users in the Approve PTO requests tab. You can approve or decline a PTO or sick leave request, as required.

Note
PTO requests can only be approved by users with the following roles: Administrator, Director, Group manager, Finance manager

To approve PTO requests

1. Go to Task management > Time entries, and then click the Approve PTO requests tab.
2. In the list of displayed requests, select the approval status for each request in the Approval column. You can select from one of:
   - Approve
   - Decline
   - Pending
   You can also select multiple requests, as required. When selected, the relevant action buttons are enabled above the list of requests. Select from Mark as approved, Mark as declined, Mark as pending or Process.
   Note that the Remaining days off column shows the remaining value in days, hours and minutes. This value is calculated as the difference between the permitted number of days off
over the year (which is set as part of your service desk's default values; see "Setting default values" (p. 217)) and the total amount of all already approved PTO requests during the current year.

In addition, the **Type** column indicates the type of request, **PTO** or **Sick leave**. If a request is the PTO type, the number value in the **Remaining days off** column is not shown.

3. (Optional) Click a request row to view the details of the request. You can also add a comment, if required.

4. Click the **Process** action button to process the selected requests.
   - If a request was approved, it is removed from the displayed list in the **Approve PTO requests** tab, and the user's remaining days off value is updated.
   - If a request was declined, it is also removed from the **Approve PTO requests** tab.
   - If a request was marked as pending, it remains in the **Approve PTO requests** tab.

### Managing sales and billing functionality

The Sales and billing module (in the management portal, go to **Sales and billing**) is where you can manage the following functionality:

- Quotes
- Sales items
- Contracts
- Invoices
- Ledgers
- Products
- Custom prices

**Note**

Before proceeding with this section, ensure that you have fully set up your account in the **Settings** section, including the creation of products.

### Sales

The **Sales** module enables you to manage the following:

- Quoting
- Sales items
- Contracts
- Custom prices

To access the **Sales** module, in the management portal go to **Sales and billing > Sales**.
Managing quotes

Use Advanced Automation's quote functionality to provide customers with quotes for your products and services. When a quote is approved, it is then automatically converted to a number of tasks to help you track and deliver the quote delivery status:

- A generic quote ticket is created for the approved quote as a task to track its progress, keep notes and log time spent on the task.
- A purchase order ticket is created for quote items that need to be purchased in order to fulfill the quote. The ticket can be also used by your team members to track its progress, keep important notes such as purchase details, and log time spent on the task.
- Quote items for contract products are automatically converted to new contracts and contract parts, or are added to existing client contracts, depending on the quote's original setup for such quote items.

To access the quotes functionality, go to Sales and billing > Sales, and then click the Quotes tab. The Quotes tab shows all the quotes you have created for customers.

**Note**
This feature is only available for users assigned the following roles: Administrator, Director, Engineer, Group manager, Finance manager, Finance, Sales

Creating a quote

When you create a new quote, an onscreen wizard guides you through three main steps. In these steps, you will:

- Add basic quote information.
- Add products and/or quote templates to the quote.
- Review and send the quote (or save to edit and send at a later date).

To create a quote

1. In the management portal, go to Sales and billing > Sales.
2. Click the Quotes tab, and then click + New. Note that if you haven't yet created a quote, you are prompted to click Create new.

**Note**
When Advanced Automation is activated for your account, you can also click New > Quote from the management portal toolbar at the top of the screen, even when you are not in the Sales module. This option automatically opens the new quote wizard via which you can create a quote, as described in the following steps.

3. In Step 1 of the displayed new quote wizard, define the following:
• **Description:** Enter a description for the quote.

• **End-user:** Select the relevant end user. The selected user will receive the quote when it is sent for approval.

• **Company name:** This field is automatically filled with the relevant company when the End-user field is defined.

• (Optional) In the free text editor box, define a quote preface. This text can include a brief introduction and description of the quote. For example: *Thank you for requesting a quote for new laptops. We have included a list of our very latest models.*

4. Click **Next.** Step 2 of the new quote wizard is displayed.

5. Click **Add template** or **Add product** to select the relevant template or product.

   • If you click **Add template:** You are prompted to select a quote template; click **Add** to add the relevant template to the quote. You can select additional quote templates and/or products, as required.

   • If you click **Add product:** Select the relevant category in the **Product category** field. Then select a product from the available list in the **Products** field.

   If the product you selected is a non-contract product (such as a standard sales item like a piece of hardware), define the **Inventory item, Quantity,** and **Discount** fields, as applicable. Note that the **Price, Supplier,** and **Description** fields are automatically filled with the selected inventory item’s details.

   If the product you selected is a contract product (such as repeated billing for managed services) the following additional fields are displayed:

      ° **Invoice interval:** Select from **Every month, Quarterly, Semi-annually,** or **Every year.**

      ° **When to bill:** Select from **Upfront** or **Afterwards.**

      ° **Payment method:** Select from **Pre-authorized debit** or **Pay manually;** the Pre-authorized debit option enables customers to pay invoices via wire transfer or by using one of the payment integrations (PayPal, Stripe) - they can also send the invoice to their local bank for direct debit processing.

      ° **Contract period (months):** Select the relevant number of months (regardless of the option you selected in the **Invoice interval** field).

6. Click **Add** to add the product to the quote.

   If you want to add additional products, in the displayed summary screen click **Add template** or **Add product.**

7. Click **Next.** Step 3 of the new quote wizard is displayed.

8. Review the quote, and select one of the following:

   • Click **Save** to save the quote. It is not sent to customers, but can be edited as required and sent at a later date.

   • Click **Save and send** to save and send the quote to the selected user.

When the quote is accepted or rejected by the customer by email or phone, you can mark the quote in the **Quotes** tab accordingly. Otherwise, if the quote is accepted or rejected in the quote portal, it is automatically reflected in the **Quotes** tab. For more information, see "Marking a quote as accepted or rejected" (p. 190).
For more information about how Advanced Automation handles the rejection or acceptance of a quote, see "How Advanced Automation processes accepted or rejected quotes" (p. 189).

**How Advanced Automation processes accepted or rejected quotes**

When a customer accepts or rejects a quote, you can locate the relevant quote in the **Quotes** tab and mark it as accepted or rejected (for more information, see "Marking a quote as accepted or rejected" (p. 190)). This, in turn, launches a series of events in Advanced Automation, depending on the option selected.

**When a quote is marked as accepted**

When you mark the quote as accepted by the customer, or the customer accepts the quote themselves, the following events occur:

- A "Thank you" message is displayed to the customer.
- The quote's status in the **Quotes** tab is updated to **Accepted**. As a result, the quote can no longer be edited, but it can be copied.
- Notification is sent to the relevant MSP user (the user who created the quote) to inform them a quote was accepted.
- A generic quote ticket is created which contains all the quote's details. The ticket is assigned to the same user selected in the quote and is accessed via the **Service desk** module.
- A purchase order (PO) ticket is created and assigned to the manager of the support group set for purchase order tickets in the **quote settings**. This ticket includes only the details of products that are non-contract products and that are not in stock.
- For non contract products, sales items are created and can be viewed in the **Sales items** tab.
- For contract products that are selected:
  - A new contract is created for the customer and line items are added for all contract products in a quote. Note that if a specific contract was not selected when defining a quote product, a new contract with this contract part is created. If a specific contract was selected, then it will have this contract part added to it.
  - The contract's start date is set according to the quote acceptance date. The contract's end date is set according to the quote acceptance date plus the quote's duration, which is defined in the **Contract period (months)** field in the quote.

**When a quote is marked as rejected**

When you mark the quote as rejected by the customer, the following events occur:

- A "Thank you" message is displayed to the customer, informing them the quote has been marked as rejected.
- The quote's status in the **Quotes** tab is updated to **Rejected**. As a result, the quote can no longer be edited, but it can be copied.
- Notification is sent to the relevant MSP user (the user who created the quote) to inform them a quote was rejected.
- Inventory items are updated to 'in stock' and are available for other quotes or sales items.
Marking a quote as accepted or rejected

When a customer accepts or rejects a quote, it can be marked accordingly in the Quotes tab. In turn, this triggers a series of events within Advanced Automation; for more information, see "How Advanced Automation processes accepted or rejected quotes" (p. 189).

To mark a quote as accepted or rejected

1. In the management portal, go to Sales and billing > Sales.
2. In the Quotes tab, locate the relevant quote.
3. In the far right column, click the ellipsis icon and select one of the following:
   - Mark as accepted
   - Mark as rejected

The quote's status is automatically updated.

Updating a quote

You can modify quotes as required. You cannot delete a quote.

Note

You can only modify a quote if its status is Pending. If the quote has been accepted or rejected, it cannot be updated (it can, however, be copied; see "Copying a quote" (p. 191)).

To update a quote

1. Go to Sales and billing > Sales, and click the Quotes tab.
2. Click the quote you want to update. The quote's details are displayed in the right sidebar.
3. Update the relevant sections, as required:
   - In the toolbar at the top of the sidebar, select from any of the following:
     - Mark as rejected: Marks the quote as Rejected in the Quotes tab. For more information about what happens to the quote when rejected, see "How Advanced Automation processes accepted or rejected quotes" (p. 189).
     - Download PDF: Downloads a copy of the quote PDF.
     - Go to quote portal: Displays an online version of the quote.
     - Resend email: Resends the quote email to the selected user.
• In the **Quote information** section, click the pencil icon and update the relevant fields. When done, click ✔.
• In the **Products** section, click + to add a new product or update an existing product associated with the quote. When done, click ✔.

4. When you have finished updating the quote, close the right sidebar.

**Copying a quote**

You can copy a quote in any status.

**To copy a quote**

1. Go to **Sales and billing > Sales**, and click the **Quotes** tab.
2. In the row of the quote you want to copy, click the ellipsis icon (…) and then select **Copy**.
3. Update the quote, as required. For more information, see "Creating a quote" (p. 187).

**Managing quote templates**

Quote templates enable you to register standard offers and use them in quotes for customers, so when creating a new quote you don't need to add them manually and configure each one. For example, you can create a quote template called "Managed services" with an included set of products covering solutions for backups, security, recovery, managed services, support and monitoring.

Advanced Automation enables you to add and modify or delete quote templates as required (see "Updating or deleting a quote template" (p. 191)).

**Adding a new quote template**

1. Go to **Sales and billing > Sales**.
2. In the displayed screen, click the **Quote templates** tab.
3. If there are no existing templates, click **Add new template**. Otherwise, click + **New**.
4. In the **Template name** field, enter a name for the template.
5. In the **Select products** field, click to select the relevant product. Then click **Add**.
6. To add additional products to the template, click **Add product**, and select the relevant product. Repeat as required.
7. Click **Done**. The new template is shown in the **Quote templates** tab, and is set to **Active** by default.

**Updating or deleting a quote template**

1. Go to **Sales and billing > Sales > Quote templates**. The displayed tab lists the existing quote templates.
2. To update a template, click on the relevant template, and in the right pane, click the pencil icon. Then update the template as required. When done, click ✔.
3. To delete a template, click on ellipsis icon (…) for the relevant template, and then click **Delete**.
Managing sales items

Sales items are services or goods provided to a customer that are subject to billing and invoicing.

**Note**
This feature is only available for users assigned the following roles: Administrator, Director, Group manager, Finance manager, Finance, Sales

Sales items are managed in the **Sales items** tab (go to **Sales and billing > Sales**), where you can view all your current sales items. Information about each sales item is also available, including the customer, the total amount of the sales items (excluding discounts), the invoice date, and if the sales item has been billed for or not. You can also filter and sort the displayed list to locate a specific or set of sales items; for more advanced filtering, use the **Filter** tool to define which sales items should be displayed.

Advanced Automation enables you to manage sales items that are:
- Automatically registered based on contract parts.
- Automatically registered as a result of ticket-based activities.
- Registered manually.

Creating a new sales item

The **Sales items** tab displays all sales items that have been created and billed. You can also add new sales items.

**To create a sales item**

1. Go to **Sales and billing > Sales**, and click the **Sales items** tab.

   **Note**
   When Advanced Automation is activated for your account, you can also click **New > Sales item** from the management portal toolbar at the top of the screen, even when you are not in the Sales module. This option automatically opens the Create new sales item wizard via which you can create a sales item, as described in the following steps.

2. In the **Customer information** section, do the following:
   - Select the relevant customer. When selected, some of the following fields are automatically filled with the relevant customer information:
     - **Billing entities** (manually select the relevant entity; the entity will be included on the invoice)
     - **Payment method** (Pre-authorized debit or Pay manually); the Pre-authorized debit option enables customers to pay invoices via wire transfer or by using one of the payment integrations (PayPal, Stripe) - they can also send the invoice to their local bank for direct debit processing)
- Send invoice by (Send invoice by mail or Send invoice by email)
- Email address contact
  - Define the invoice date.
3. In the Customer address section, the relevant details for the selected customer are displayed. You can manually update the address for this specific sales item, if required.
4. Click Next. The Products tab is displayed, where you can add any products to the sales item.

Note
Products are a service or item that you sell to customers. For example, antivirus subscriptions or ad-hoc support.

5. Click Add product to select the relevant pre-defined products in Advanced Automation (including Acronis products).

Note
Ensure that you have created one or more products that have the Use in contracts option disabled. This ensures the relevant product types are available when creating a sales item (if a product is set with Use in contracts, it can only be used in contracts).

6. In the Product field, select the relevant product.
7. Add a Quantity and Price in the relevant fields.
8. (Optional) Select the Apply discount check box (when selected, you can apply the discount amount and add a reason for the discount) and a Description for the product.
9. Click Add to add the product to your sales item. To add additional products, click Add product and repeat the steps above.
10. Click Next. The Line item note tab is displayed.
11. Click Add line item note, enter the relevant description, and then click Add. Repeat as required for additional line item notes.
12. Click Done. The sales item is added to the Sales items tab.

Modifying sales items
You can modify and delete sales items as required.

Note
You can only modify or delete a sales item if it has not yet been billed for. After it has been included in a billing, a sales item can be viewed only; it cannot be edited or deleted.

To modify a sales item
1. Go to Sales and billing > Sales, and click the Sales items tab.
2. Click the sales item you want to modify. The sales item's details are displayed in the right sidebar.
3. Modify the relevant sections, as required:
In the Customer information section, click the pencil icon and edit the relevant fields. Then click Save.

* In the Products and Line item notes sections, click to add new products or line item notes. Alternatively, click the pencil or trash can icons to edit or delete existing items. For each product or line item note that you add or modify, click Save when done.

**Note**
For further information about the editable fields in a sales item, see "Creating a new sales item" (p. 192).

To delete a sales item
1. Go to Sales and billing > Sales, and click the Sales items tab.
2. In the far right column of the sales item you want to delete, click the ellipsis icon and then select Delete.
3. In the displayed confirmation message, click Delete.

Working with contracts

The Contracts tab shows all the contracts you have created for customers.

Each contract defines a set of services that you provide to a customer, including the price, terms and conditions. Invoices are then issued according to the payment terms defined in the contract.

When creating a contract, complete the onscreen wizard by adding the relevant contract information, billing information, and contract parts.

To access the contracts functionality, go to Sales and billing > Sales, and then click the Contracts tab.

Creating a new contract

When you create a new contract, a wizard guides you through three main steps. In these steps, you will:

- Add basic contract information
- Add billing information
- Add contract parts

**Note**
If you enabled Advanced Automation (see “Enabling Advanced Automation” (p. 155)) and defined a new customer with billing information, when you create a new contract for this customer they will have only two steps in the contract wizard (basic contract information and contract parts).

When you complete the wizard, the contract is automatically added to the list of existing contracts displayed in the Contracts tab. They can be then be viewed and updated, as required; see "Modifying a contract" (p. 198).
To create a new contract

1. In the management portal, go to Sales and billing > Sales.
2. Click the Contracts tab, and then click + New contract.

Note
If you have existing customers that have no contracts assigned, you will be prompted to create contracts for them. When clicking Create or Create contracts for existing customers, you can select the relevant customer, and click Next. You must then define contract information, as described in the next step.

3. In the displayed wizard, define the following contract information:
   - Reference number: (Optional) The reference number that is frequently used in paper contracts.
   - Contract name: The contract name.
   - Organization: Select the relevant organization from the drop-down list.
   - Contact email: (Optional) Email contact for this contract.
   - Billing entity: Select the relevant billing entity.
   - In the Payment details section, select an interval period (Every month, Quarterly, Semiannually, Every year), when to bill (Upfront or Afterwards), and select the payment method (Pre-authorized debit or Pay manually; this enables customers to pay invoices via wire transfer or by using one of the payment integrations - they can also send the invoice to their local bank for direct debit processing).
   - In the Contract period section, define the contract period (if the contract has no defined end, select the Forever check box), and select whether to send the invoice by email or mail.
   - In the Customer address section, define the relevant address details.
   - If you want to include block hours in your services, enable the Block hours option switch. Then define the number of block hours and the renewal threshold percentage. Select the Retainer check box if this contract is a retainer agreement (and the block hours are billed every month, quarter, or half year). Once enabled, you can:
     - Discard remaining hours (to discard the remaining hours not consumed during the retainer billing period).
     - Keep remaining hours (to keep the remaining hours not consumed during the retainer billing period).
   Time spent on tickets is either invoiced separately, marked as non-billable if the work is part of a fixed price agreement, or booked against the current block hour credit.
Note
Block hours enable you to reserve a block of support hours for customers, and are billed based on the default block hour product rate as set in the invoice settings. The renewal threshold is used to notify you when the current block has a specific number of hours remaining. The notification allows you to create a sales item for a new block by clicking Renew block hours. Once the new block is billed, it is shown in the available block hours balance.

- Select the Pro-rated check box if changes made to the contract will be billed prorated or at their full price.

4. Click Next to move to Step 2 of the contract wizard, billing information. Note that if you have already defined billing information for this customer, you proceed to Step 3 of the contract wizard, adding contract parts (see Step 7 below).

5. Define the following fields:
   - **Business name**: The predefined customer name.
   - **Legal form**: Select the applicable legal name of the customer’s organization.
   - **Debtor code**: (Optional) The customer code used in third party systems.
   - **Email**: (Optional) The customer’s predefined email address.
   - **Website**: (Optional) The customer’s website URL.
   - **Main office**: (Optional) Select the parent company from the list.
   - **VAT / Sales tax number**: (Optional) The customer’s VAT or Sales tax number.
   - **Time registration roundup time (minutes)**: Define a value which will overwrite the default general roundup time setting (the minimal roundup for a work time submission) for the customer. For example, when a technician works five minutes, it can be automatically rounded up to 15 minutes, or whatever value you set.
   - **Payment terms (days)**: (Optional) Define the number of days in which a customer has to make payment.
   - **Direct debit**: (Optional) Select the check box if payment will be made by direct debit.
   - **Create subtotals on invoice**: (Optional) Select the check box, if required.
   - **Consolidate billing into one invoice**: (Optional) Select the check box, if required.
   - **Bank account**: (Optional) Enter the customer’s bank account number.

   The Bank account field relates to the direct debit functionality, via which you can send instructions to your bank to charge a specific customer (in addition to some offline confirmation, an invoice can be submitted to your bank to charge a customer; the invoice should contain details about the customer). For more information, see "Defining billing information for a tenant" (p. 39).

6. Click Next to move to Step 3 of the contract wizard, the adding of contract parts.

7. Click Add contract part.
Note
If the selected customer has defined Acronis products or services, you are prompted to edit or delete these, as required. You can then add additional contract parts, as described below.

8. Define the following fields:

- **Contract part type**: Select the relevant contract part type from one of the following:
  - **Default type**: Used for general contracts that do not use an integration.
  - **ICT service**: This type enables you to sell an ICT (information and communication technology) service, such as *File storage*. When offering this service, multiple ICT assets can be added, including data centers, storage servers, network switches, etc. However, you can also use these assets in other contract parts. For example, when you create the *File storage* ICT service, you can add the data center, storage server and switch; when adding another ICT service that also uses the data center, you can still add the data center in this other contract part. When you create a ticket for the customer, the system lets you first select an ICT service and then the associated asset(s).
  - **Managed service**: This type is generally used for managed services such as *Workstation management*. Add the relevant machines to the contract part. Once done, these assets are removed from the list of available machines so they cannot be connected to another contract part.

- In the **Product or services** section, select the relevant products or services you want to add, including the quantity and price of the product or service.

- In the **Contract period** section, define the relevant period. If there is no end date, select the **Forever** check box. By default, these dates are copied from the contract information settings (see above). Note that the date range should be shorter than the main contract date range. To apply a longer period, you must first adjust the main contract period.

- Click the **Trial** option switch if you want the contract part to be part of a trial period. To define the trial period, select the relevant number of months. Trial contract parts are included in invoices during a billing run with zero prices for information. When the trial period ends, the contract part shows the regular price in generated invoices.

Note
The trial option can only be applied one-time per contract part. In addition, if the selected contract part has previously been billed for, you cannot enable the trial option.

- **Integrations**: Select the relevant integration. When an integration is selected, an additional **Show machines in invoice** field is displayed. This field defines if machine details are included in the invoice; **Yes** is selected by default.

Integrations enable you to tie the quantity of a contract part to real usage provided by the selected integration (such as the number of active workloads for a specific customer, or the number of virtual machines or amount of gigabytes used by a customer in hosted storage). The available workloads include those with Acronis products and services (for example, Cyber Disaster Recovery Cloud, and Cyber Protection), and RMM integrations.
To find the relevant integrated workloads, you can filter by client (meaning those workloads related to the selected client), workload type (workloads of a specific workload type), and individual workloads (search for and select the relevant workloads from the workloads list). In this section, you can also select an RMM integration and link the different agents associated with it (for the RMM alert-to-email functionality to work correctly, you must have the correct machines added to valid contracts). Advanced Automation uses these to connect the RMM site or group with the right customer. Using this information, it can apply the SLA to the ticket, based on the contract to which the machine is connected.

**Note**
An additional Automatic updates check box is also displayed, and enables the automatic workload number calculation for invoices. When selected, it disables the Quantity field in the Product or services section.

- **Service Level Agreement**: Select the relevant SLA.

9. Click Add to add the contract part to the contract.

10. (Optional) Click Add contract parts to add additional contract parts.

11. Click Done. The contract is added to the list of existing contracts in the Contracts tab.

**Modifying a contract**

You can modify a contract at any time, including the products or services attached to a contract.

**Note**
You cannot delete a contract or contract part. Instead, set the contract period to "end" to stop it (for example, at the end of the current month). This should be applied to the relevant contract parts first, and then the contract itself. The contract will then be inactive, but will still be available when searched for.

**To modify a contract**

1. In the management portal, go to Sales and billing > Sales.

2. In the Contracts tab, click the contract you want to edit.

3. In the right pane, modify the relevant contract details. Click the pencil icon in each relevant section; when done, click ✓.

   For more information about the editable fields, see "Creating a new contract" (p. 194).

**Note**
If block hours were enabled for a contract, you can renew the block hours manually by clicking Renew block hours. A new sale item for block hours is automatically created and a confirmation message displayed.

4. When done, click Save.
Reviewing the change history of a contract

You can review any changes made to a contract throughout the life of the contract. The log that stores this change history includes the initial creation of the contract and any subsequent updates.

**To review the change history of a contract**

1. In the management portal, go to **Sales and billing > Sales**.
2. Click the **Contracts** tab, and in the displayed list of contracts, click on the relevant contract.
3. In the displayed right pane, click the **Contract history** tab.

```
Server management

| Added a contract part <Advanced Backup - Server (SRDAMSENS)> |
| Partner Administrator |
| Tuesday, 18 Apr 2023, 14:52:45 |

| Added a contract part <Server management> |
| Partner Administrator |
| Tuesday, 18 Apr 2023, 14:52:08 |

| Created the contract |
| Partner Administrator |
| Tuesday, 18 Apr 2023, 14:50:54 |
```

4. [Optional] Use the **Search** tools to navigate to the relevant update. You can also use the **Expand all / Collapse all** options to view/hide the details of all updates.

5. To review a specific change made to the contract, click on the relevant row. Depending on the change made, different information is shown:
   - When the contract is created: Most of the information defined when creating the contract is shown, including billing information.
   - When the contract is updated: Only the updated contract attributes and their previous/new values are shown.
   - When a contract part is added: Most of the information defined when adding the contract part is shown, including any enabled integrations.
   - When a contract part is updated: Only the updated contract part and its previous/new values are shown.
   - When a contract part is removed: The last state of the contract part, including any enabled integrations, is shown.
Working with custom prices

Custom pricing enables you to customize the price of a product. This can help you to automate the application of specific pricing agreements with clients.

For example, if you have a standard rate for project work of $100 per hour, but with another client you have agreed a rate of $130 per hour, you can create a custom price for the ‘project work hourly rate’ for that client, with a price of $130. Each time you create a sales item or tickets for this kind of work for this client, the custom price is applied.

Note
You can only customize a price if the product is not a contract product.

To access custom prices, go to Sales and billing > Sales, and then click the Custom prices tab.

Adding a custom price

To add a custom price
1. In the management portal, go to Sales and billing > Sales, and then click the Custom prices tab.
2. Click + New custom price.
3. Select the customer you want to apply the custom price to, and then click Add product custom price. Note that the list of customers shows only customers without custom prices yet specified.
4. In the Product category field, select the relevant category from the drop-down list.
5. In the Product field, select the relevant product from the drop-down list. This list only shows products with standard prices; products already defined with a custom price are not shown.
6. Enable the Active toggle switch if you want this custom price to be available.
7. Enter the product custom price and click OK.
8. To add another custom price, click Add product custom price, otherwise click Create.

Editing a custom price

To edit a custom price
1. In the management portal, go to Sales and billing > Sales, and then click the Custom prices tab.
2. Click on the customer whose custom prices you want to edit.
3. In the right pane, click the pencil icon and make your changes.
   For example, you can add a new custom price (see "Adding a custom price" (p. 200)), or edit the details of an existing custom price.
4. When done, click ✓.
Invoices

The **Invoices** module enables you to manage and track invoices you create for your customers. Using this module, you can:

- Generate new invoices for customers.
- Confirm payment of an invoice.
- Resend an invoice.
- Track the history of previously issued invoices.
- Download and/or export an invoice or invoice batch.

To access the **Invoices** module, in the management portal go to **Sales and billing > Invoices**.

**Note**

Only users with the Administrator, Director, Finance, Finance manager or Sales roles can generate invoices. Users assigned the Client manager or Client roles can only view and download invoices.

Viewing current invoices

To view your current invoices, in the management portal go to **Sales and billing > Invoices**. In the displayed **Invoices** screen, you can view all invoices in Advanced Automation.

Information about each invoice is displayed, including:

- The date the invoice was created.
- The payment status (**Confirmed** or **Not confirmed**), and, if paid, the date payment was made.
- If an email was sent to the customer.
- The amount of the invoice.
- If the invoice was synced with your accounting software (if activated).

Click on an invoice to view additional details about the invoice in the right pane. This information includes a general overview of the invoice, and details on each of the invoice items. In this pane you can also download and export the invoice as required.

You can also filter and sort the displayed list to locate a specific invoice; for more advanced filtering, use the **Filter** tool to define which invoices should be displayed.

<table>
<thead>
<tr>
<th>Product name</th>
<th>Price</th>
<th>Cost</th>
<th>Status</th>
<th>Contract product</th>
<th>Ledger</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server mngmt</td>
<td>$100.00</td>
<td>$0</td>
<td>Active</td>
<td>Yes</td>
<td>402</td>
<td></td>
</tr>
<tr>
<td>Workstation mngmt</td>
<td>$100.00</td>
<td>$0</td>
<td>Active</td>
<td>Yes</td>
<td>402</td>
<td></td>
</tr>
</tbody>
</table>

Generating a new invoice

When you generate a new invoice or invoice batch, you are actually creating the invoice data using an invoice template (as defined in “Billing settings” (p. 241)). This data can then be sent as an invoice.
via Advanced Automation (if defined accordingly in your billing and contract settings), or sent by an alternative way. For example, your accounting software might be configured to send invoices to your customer, or invoices are sent as hard copies.

You can also resend an invoice, if required; see "Resending an invoice" (p. 204).

To generate a new invoice

1. In the management portal, go to Sales and billing > Invoices.
2. If you have not yet created an invoice, click Create new. Otherwise, click + New.
   The Create new invoice wizard is displayed.
3. Select the invoice date and the relevant billing entity. Then click Next.
4. Select the direct debits, manual payment contracts, and sales items you want to add to the invoice:
   • In the Direct debit tab, select the relevant pre-authorized debits from the displayed list.

   **Note**
   If a contract was defined with Pre-authorized debit as the payment method, it is categorized as a pre-authorized debit contract. This enables customers to pay invoices via wire transfer or by using one of the payment integrations. They can also send the invoice to their local bank for direct debit processing.

   • In the Manual payments tab, select the contracts that were defined as Pay manually.
   • In the Sales items tab, select the relevant sales items.
When you have finished selecting invoice items, click **Next**.

5. In the Summary screen, click **Download** to see a preview of the invoice batch in PDF format.

```
3. Invoice preview
Inspect the invoice preview before you proceed.
```

If the invoice preview is correct, select the **The invoices are correct and can be sent to the customer** option button.

If the invoice preview is not correct, select **The invoices are incorrect**. This redirects you to the main Invoices screen and stops the invoice process. It also enables you to reevaluate your contract and invoice items. You can reprocess the invoice once it is corrected.

6. Click **Done**.

You are redirected to the Invoices list, where you can view the invoice batch you just generated; the invoice batch also shows the individual invoices inside the batch. Invoices are then sent by email or not depending on the customer settings.
Note
You cannot update an invoice, but you can update individual sales items, time entries, and contract parts that will be included in a corrected future invoice. When you have made those updates, you can then generate the correct invoice.

Resending an invoice
You can resend any invoice that has not yet been confirmed as paid, and that was set to be sent by email. Any invoice that was paid or set to be sent by post, cannot be resent.

To resend an invoice
1. In the management portal, go to Sales and billing > Invoices.
2. Select the invoice(s) you want to resend. The Resend invoice button is displayed, as shown below.

```
<table>
<thead>
<tr>
<th>Cust...</th>
<th>Ema...</th>
<th>Pay...</th>
<th>Paid</th>
<th>Delli...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service de...</td>
<td>Sent</td>
<td>Not co...</td>
<td>By email</td>
<td></td>
</tr>
</tbody>
</table>
```

Note
If you select multiple invoices but one or more of the invoices was confirmed as paid or was set to be sent by post, the Resend invoice button is displayed, but disabled.

3. Click Resend invoice. The invoice is resent to the customer, and a confirmation message displayed.

Confirming or rejecting an invoice payment
You can manually confirm or reject payment for an invoice, as required.

To confirm or reject payment
1. In the management portal, go to Sales and billing > Invoices.
2. Select the invoice(s) you want to confirm or reject.
3. If the payment was already confirmed, and you need to reject it for some reason, click Reject payment in the top bar located above the list of invoices.
If the payment is not confirmed, click **Confirm payment**. Alternatively, click the ellipsis icon (...) in the far right column. In the displayed menu, click **Reject payment** or **Confirm payment**. The displayed list of invoices is updated.

### Downloading an invoice as a PDF file

**Note**
Before performing the steps below, ensure that you have a PDF reader installed on your device.

**To download an invoice as a PDF**

1. In the management portal, go to **Sales and billing > Invoices**.
2. Select the invoice(s) you want to download.
3. In the top menu bar located above the list of invoices, click **Download**.
   Alternatively, click the ellipsis icon (...) in the far right column. In the displayed menu, click **Download**.
   The invoice is downloaded to your device in PDF format.

### Exporting an invoice as a CSV or XML file

You can export an invoice as a CSV or XML file. These files can then be used in a third party system, such as your accounting platform, which is not integrated with Advanced Automation.

**To export an invoice as a CSV or XML file**

1. In the management portal, go to **Sales and billing > Invoices**.
2. Select the invoice(s) you want to export.
3. In the top menu bar located above the list of invoices, click **Export CSV** or **Export XML**.
   Alternatively, click the ellipsis icon (...) in the far right column. In the displayed menu, click **Export CSV** or **Export XML**.
   The file is downloaded to your device in the chosen format.

### Products

The **Products** module enables you to define and manage your products, which are typically a service or item you sell to your customers. For example, antivirus subscriptions, ad hoc support, hardware deliveries, and so on.
Products can be used when creating contracts or sales items. The values that you enter for the product item are reused when you create a sales item or contract and can be changed to reflect what has been agreed with your customer.

Note that only users with the Administrator, Director, Finance, or Finance manager roles can create products. Once created, products can then be used in contracts, tickets, projects, quotes, etc, by other Advanced Automation users.

To access the Products module, go to Sales and billing > Products.

**Viewing existing products**

To view existing products, in the management portal go to Sales and billing > Products. In the displayed Products tab, you can view all current products in Advanced Automation. These products include pre-configured Acronis products and services, as well as your own products.

Information about each product is displayed, including:

- The price of the product
- The cost of the product
- The product's current status (Active or Inactive)
- The type of product (contract, ticket, or project (available in future versions))
- The ledger the product belongs to
- A short description of the product

You can also filter and sort the displayed list to locate a specific product; for more advanced filtering, use the Filter tool to define which products should be displayed.

**Adding a product**

In addition to the Acronis products and services available in Advanced Automation, you can create any number of your own products and offerings.

**To add a product**

1. In the management portal, go to Sales and billing > Products. The Products tab is displayed by default.
2. Click + New product. The Create new product screen is displayed.
3. Define the following:
   - **Name**: Enter the name of the product.
   - **Description**: (Optional) Enter a description of the product.
• **External ID:** (Optional) Enter a unique identifier for the product; this ID should be used outside the current line of products in Advanced Automation.

• **Price:** Enter a price for your product. Select the **Taxable** check box if the product is taxable (this will depend on your local tax laws).

• **Cost:** Enter the cost of the product, or the price paid to a vendor or distributor for the product.

**Note**
In order to provide more details about the profitability of a product and its related statistics, we recommend you configure not only prices for products, but also their cost.

• In the **Product properties** section, select any or all of the following:
  - **Contract product:** Select the check box if you want the product to be available in contracts.
  - **Ticket product:** Select the check box if you want the product to be available in tickets. When selected, you can also select the additional **Price adjustable by engineer** check box; this enables engineers to adjust the default price when using this product in a ticket.
  - **Project product:** (Available in future versions) Select the check box if you want the product to be available in projects. When selected, you can also select the additional **Price adjustable per project** check box; this enables the default price to be adjusted when using this product in a specific project.
  - In addition, select the **Product for activity-based billing** check box if you want the product to be listed in tickets for engineers. This field is not available if **Contract product** is selected.

**Note**
This option ensures additional time required for experts (for example, when a technician needs assistance from an architect or security expert) can be assigned to a ticket. In turn, these hours can be billed under their special rate instead of a default ticket rate.

• **Ledger:** (Optional) Select the relevant ledger from the drop-down list.

• **Active:** (Optional) Select the check box to make the product available.

• **VAR product:** (Optional) Select the check box if you are reselling the product - meaning that you first purchase the product from somewhere else. When this check box is selected, revenue for this product is aggregated separately as 'VAR' revenue.

4. After reviewing your new product's details, click **Done.**

### Editing a product

**To edit a product**

1. In the management portal, go to **Sales and billing > Products.** The **Products** tab is displayed by default.

2. Click on a product you want to edit.
3. In the right pane, click the pencil icon and edit the product. For more information about the editable fields for a product, see "Adding a product" (p. 206).

**Note**
If a contract product is included in a product bundle, you cannot update it. You are prompted to first remove it from the relevant product bundle before updating it here.

4. When done, click ✓.

**Product categories**
Advanced Automation enables you to add new categories as required.

When you apply categories to your tickets, you get a good overview of the most common issues affecting each customer. For example, when a customer has 50% of their tickets categorized as *Workstation/virus*, you might want to replace security measures and upgrade training for the relevant personnel.

Categorizing your products also enables you to organize multiple products into a single group. If you have hundreds of products listed, creating a category will help you find them easily.

**Adding product categories**
You can add new product categories as required.

Once created, you can enable or disable a category, as described below, and edit according to your requirements (see "Editing product categories" (p. 209)).

**Note**
This option is only available to users assigned the following roles: Administrator, Director, Finance manager, Finance

**Adding a new product category**
1. Go to Sales and billing > Products.
2. In the displayed screen, click the **Product categories** tab.
3. If there are no existing categories, click **Create new**. Otherwise, click + **New**.
4. In the **Product category name** field, enter a name for the category.
5. In the **Select products** field, click to select the relevant product. Then click **Add**.
6. To add additional products to the category, click **Add product**, and select the relevant product. Repeat as required.
7. Click **Done**. The new category is shown in the **Product categories** tab, and is set to **Active** by default.
Enabling or disabling a product category

1. Go to Sales and billing > Products. The displayed Products tab lists the existing categories.
2. To activate a category, click on the relevant Inactive category, and in the right pane, click the pencil icon. Then enable the Status toggle switch. When done, click ✓.
3. To disable a category, click on the relevant Inactive category, and in the right pane, click the pencil icon. Then disable the Status toggle switch. When done, click ✓.

Note
You can also enable or disable the category status when editing the category. See "Editing product categories" (p. 209) for more information.

Editing product categories

To edit a product category

1. Go to Sales and billing > Products. The displayed Products tab lists the existing categories.
2. To edit a category, click on the relevant category, and in the right pane, click the pencil icon.
3. Make the required changes. For example, remove and add products, or change the category status to Active/Inactive.
4. When done, click ✓.

Managing product bundles

Product bundles enable you to combine multiple products and services into a single package.

Note that product bundles currently only support products that are marked as contract products.

Creating a product bundle

To create a product bundle
1. In the management portal, go to Sales and Billing > Sales, and click the Bundles tab.

2. If you are creating your first product bundle, click Create new. If you have existing bundles, click New in the top right corner.

3. In the displayed dialog, do the following:
   a. Enter the bundle's name.
   b. Enter a description of the bundle.
   c. Select a product category.
   d. Select a product. Note that only contract products are available for selection in bundles.
   e. Click Add to add the product to the bundle.

   ![Bundle information dialog](example_image)

   f. To add an additional product to the bundle, click Add product. Then select the relevant product category and product, and click Add. Repeat as required.

4. When you have added all the relevant products to the bundle, click Done.
   The bundle is now available for use when adding or updating a contract. For more information, see "Working with contracts" (p. 194).

**Editing product bundles**

You can edit and delete product bundles as required.

**To edit product bundles**

1. In the management portal, go to Sales and Billing > Sales.

2. Click the Bundles tab to view any existing product bundles.
   If no bundles are displayed, you can click Create new to create a bundle. See "Creating a product bundle" (p. 209) for more information.
3. Click the relevant bundle row, and in the right pane, click the pencil icon.

4. In the Bundle information section, modify the bundle name and description as required.

5. In the Products section:
   - Click + to add a new product. Then select the relevant product category and product, and click Add. Repeat as required.
   - Click the pencil icon to edit the product. For example, you might want to replace an existing product with a different product from the same category. When done, click Save.
   - Click the trash can icon to delete a product from the bundle.

6. When done, click ✓.

To delete a product bundle
1. Click the relevant bundle row, and in the far right column, click the ellipsis icon (...).
2. Select Delete. The bundle is deleted.

Note
Even if a product bundle was assigned to a current, ongoing contract, it can be deleted. This is because the bundle is basically just wrapping a number of individual products to a contract; a contract part is then added to the contract, one contract part for each product. After the contract is created, the bundle can be deleted.

Managing ledgers
The Ledgers section enables you to manage the ledger numbers that you currently use in your accounting system. These ledgers can then be connected to products you sell to your customers.

For example, when you create a CSV or XML export of your billing run, the export will contain all transactions including the correct ledger number. This allows for fast and easy imports.

To access ledgers, go to **Sales and billing > Products** and then click the **Ledgers** tab.

Creating a ledger

To create a ledger
1. In the management portal, go to Sales and billing > Products, and then click the Ledgers tab.
2. Click + New.
3. In the Ledger information screen, define the following:
   - Define the ledger number.
   - (Optional) Enter the ledger's External ID.
   - (Optional) Enter a description for the ledger.
   - To use the ledger immediately, select the Active check box.
4. Click Done.

**Editing a ledger**

**Note**
Ledgers can be edited as required, but cannot be deleted.

**To edit a ledger**
1. In the management portal, go to Sales and billing > Products, and then click the Ledgers tab.
2. Click on the ledger row you want to edit.
3. In the displayed right pane, click the pencil icon and edit as required.
4. To deactivate an active ledger, disable the Status toggle switch.
5. When done, click ✓.

**Configuring Advanced Automation settings**

In the Settings module you can configure various settings for your Advanced Automation account. These settings should be defined before working with the service, as they include a number of key settings required for getting started with your billing and service desk. This section includes settings for:

- Service desk
- Billing and quoting

**Service desk settings**

Service desk settings enable you to set up all essential sections of your service desk.

It is important for this to be done correctly for your tickets to function properly.

To access the service desk settings, go to Settings > Service desk.

**Note**
Under the service desk settings, you can also define user groups for your Advanced Automation users. This is described in "Managing user groups" (p. 164), in the Managing your users section.
Configuring canned responses

Canned responses enable you to add comment templates as part of your standard comments when creating a new ticket. These comments are included in the ticket's description.

Creating a canned response

You can add any number of canned responses to your service desk.

To create a new canned response

1. Go to Settings > Service desk.
2. Click the Canned responses tab.
3. Click Add new icon.
4. In the displayed dialog, define a name for the canned response, and add the relevant content.

   You can use the following variables:
   [SUPERIOR] - The name of the user's manager
   [ENDUSER] - The name of the user
   [SUPPORTUSER] - The name of the person that updates the ticket
   [STATUS] - The status of the ticket
   [TITLE] - The ticket title

5. By default, the canned response is Active. To deactivate the canned response, click the Active option switch.
6. Click ✓ to save the canned response. Once saved, the canned response can be used as content in the Comments field.
Editing or deleting a canned response

You can edit and delete canned responses as required.

To edit a canned response

1. Go to Settings > Service desk.
2. Click the Canned responses tab.
3. Click the pencil icon for the canned response you want to edit, and then edit as required. For more information about the available options, see "Creating a canned response" (p. 213).
4. Click ✓ to save your changes.

To delete a canned response

1. In the Canned responses tab, click the trash can icon for the canned response you want to delete.
2. In the displayed confirmation message, click Yes.

Setting up priorities

You can define the priorities for your tickets. These priorities are used during the processing of a ticket, which will depend on the priority you set for each individual ticket. For example, an urgent priority is generally processed before a ticket that has a normal priority.

Adding a priority

To add a new priority

1. Go to Settings > Service desk.
2. Click the Priorities tab.
3. Click Add new.
4. Enter the priority name and click ✓. Note that the name does not reflect the level of priority but should be self-descriptive.
   By default, the priority is set as active.
   After you have successfully added the new priority, it can be used in the Priority field of your tickets (see "Creating a new ticket" (p. 171)). If required, you can set default priorities for tickets and default priorities for tickets coming from specific customers.

Editing or deleting a priority

You can edit and delete priorities as required.

To edit a priority

1. Go to Settings > Service desk.
2. Click the Priorities tab.
3. Click the pencil icon for the priority you want to edit, and edit as required.
4. Click ✓ to save your changes.
   
   Note that you can also deactivate a priority by disabling the option switch next to the relevant active priority.

To delete a priority

1. In the Priorities tab, click the trash can icon for the priority you want to delete.
2. In the displayed confirmation message, click Yes.

   Note
   
   The priority can only be deleted if it is currently deactivated and if it was not used in any tickets.

Managing your SLA policies

A service level agreement (SLA) policy is an official commitment between you and the customer. The SLA covers the quality of service you are offering to a customer and your committed availability to them.

Advanced Automation enables you to manage SLAs, which, in turn, helps you organize the flow of support tickets and automate billable time calculations. In addition to the customer facing aspect, it helps you ensure that engineers stay on top of tickets and prevents tickets from existing for months without being handled.

You can configure and define SLAs to use for customer contracts, ticket activities and compliance tracking.

Creating a new SLA

To create a new SLA

1. Go to Settings > Service desk.
2. Click the SLA tab, and then click Add new.
3. In the displayed screen, enter the name of your new SLA.
4. Define the applicable time range of your SLA by entering the initial response time (in hours) and feedback interval (in hours), and then entering the start and end time.
5. Select the Apply SLA during > Weekends check box to activate or deactivate (the default) this SLA during weekends.
6. Select the Apply SLA during > Holidays check box to activate or deactivate (the default) this SLA during holidays.
7. Set how your SLA is charged, by selecting Fixed Price or Subsequent Calculation.
8. Select a default product for billing, and a special rate activity for billing in the relevant drop-down lists.

- Default product for billing: This optional parameter indicates a billable ticket-type product for ticket updates made within the SLA hours. For example, when a ticket engineer works on a ticket and an SLA is set, Default product for billing is pre-selected as a billable product for ticketed work. The product is automatically included in the ticket's time approval process, so a
customer can be automatically billed for the relevant hours.

- **Special rate activity for billing**: This optional parameter is the same as for Default product for billing, but for ticket updates outside the SLA hours.

9. If you want to set this SLA as the default, select the **Assign as default Service Level Agreement** check box.

10. Click ✔️ to save the SLA.

   By default, the SLA is set as **Active**; to deactivate it, click the **Active** option switch.

   After you have successfully created the new SLA, it can be used in the **SLA** field of your tickets.

   For more details, see "Creating a new ticket" (p. 171).

### Editing an SLA

**To edit an SLA**

1. Go to **Settings > Service desk**.
2. Click the **SLA** tab, and then click the pencil icon for the relevant SLA.
3. Make the changes you want to the SLA; for more details, see "Creating a new SLA" (p. 215).
4. Click ✔️ to save your changes.

---

**Note**

If the SLA was previously used for by customers (in tickets), you cannot deactivate the SLA.

---

### Defining categories and subcategories

You can define any number of ticket categories to use in the Advanced Automation service desk.

Advanced Automation comes pre-filled with a set of categories and subcategories; when applied to your tickets, categories and subcategories provide a good overview of the most issues that are taking the most time and respond accordingly. You can also see these insights on a per customer basis.

In turn, this can help you improve your services. For example, when a client has 50% of their tickets categorized as Workstation/virus, you might want to upgrade security measures and staff training.

**Creating a category or subcategory**

**To define a new category or subcategory**

1. Go to **Settings > Service desk**.
2. Click the **Categories and subcategories** tab.
3. Click **Add new**, and then enter the name for the category. If you want to make the category a subcategory, select the relevant parent category. The category or subcategory is created, and can be activated or deactivated as required, as described below.

**To activate / deactivate a category or subcategory**

In the **Categories and subcategories** tab, click the active switch to activate/deactivate the relevant category or subcategory.
Editing or deleting a category or subcategory

To edit a category or subcategory

1. In the Categories and subcategories tab, click the pencil icon for the relevant category or subcategory.
2. Edit as required.

To delete a category or subcategory

1. In the Categories and subcategories tab, click the trash can icon for the relevant category or subcategory.
2. In the displayed confirmation message, click Yes.

Note
The category or subcategory can only be deleted if it is currently deactivated and if it was not used in any tickets.

Setting default values

You can define default values for many Advanced Automation features.

Note that you can override the general default settings with customer-specific values in each customer’s settings.

To define default values

1. Go to Settings > Service desk.
2. Click the Default values tab. The list of default values is displayed:
   - Default SLA: The default SLA applied to tickets. By default, Default SLA is selected.
   - Category: The default ticket category. By default, Hardware issue is selected.
   - Default priority: The default priority for tickets. By default, Normal is selected.
   - Default group: The default group for tickets. By default, Support group is selected.
   - Default support user: The default support user for tickets. By default, the partner Admin is selected so that it is unique for each partner.
   - Days off per year: The default days off per year for users. By default, 15.
   - Default billing entity: The default billing entity used for invoices. By default, Default is selected.
   - Client documentation: A link to customer-related documentation. By default, this field is empty.
   - Occupancy rate notification threshold: The notification threshold is where the amount of worked time recorded by you or a group of which you are a member or manager of is below the set hours for that day; a reminder is sent to complete the hour registration. By default, 85 is selected.
• **Auto pause ticket timer on screen leave**: You can auto-pause the ticket timer whenever users switch their active screen to a different one. By default, **No** is selected.

• **Ticket update mandatory**: Define if the **Ticket description** field in the ticket settings is mandatory. This enables you to track changes to a ticket more closely during the processing of a ticket. By default, **No** is selected.

• **Ticket submit page link**: The page unauthorized users can access externally to submit a ticket directly into Advanced Automation. By default, a predefined system link is selected.

• **Custom field 1 / Custom field 2**: Define up to two additional custom fields for the ticket submit page, according to your requirements. You can also define if the fields are **Active** and **Mandatory**.

3. Apply the default values you want, and click **Save**.

### Defining country and language settings

The **Country settings** tab enables you to define global company settings when working with Advanced Automation, including your default country and time zone. These global settings impact the currency and hours displayed, and are especially important for hours that are part of a Service Level Agreement (SLA).

**To define country and language settings**

1. Go to **Settings > Service desk**, and then click the **Country settings** tab.

2. In the **Country settings** section, click the pencil icon to edit any of the following settings:

   - **Default country**: Select the relevant country. The selected country defines the default currency used for all prices and costs in Advanced Automation.

   - **Time zone**: Select the relevant time zone. The time zone impacts SLA hours by determining whether tickets are received within SLA hours or outside of SLA hours. It can also impact the price for ticketed work.

   - **Daylight savings**: Click the toggle switch to enable Daylight Saving Time.

3. Click ✓ to save your changes.

4. In the **Languages** section, click the pencil icon to define the default system language used in Advanced Automation.

5. Click the toggle switch to enable the relevant language.

6. Click ✓ to save your changes.

### Activating and deactivating statuses

The **Statuses** tab shows the various statuses available for service desk, quote and project tickets. You can activate or deactivate the statuses for tickets.

**Note**

You cannot add or delete a status or delete or change the name of the status. For some integrations, statuses are linked to ticket statuses.

**To activate or deactivate statuses**
1. Go to Settings > Service desk.
2. Click the Statuses tab and then click Edit.
3. In the displayed list of statuses, click the activate/deactivate switch for the relevant statuses. Note that if a status is grayed out, it indicates that the status is predefined in Advanced Automation and cannot be changed.
4. Click Save.

Defining default RMM ticket integration settings

When integrating with Remote Monitoring and Management (RMM) systems, you can set the Default SLA, Category and Priority fields for tickets generated by your RMM. If a ticket is RMM-integrated, default values are automatically applied, depending on the values you define in the following procedure.

To define default RMM ticket integration settings

1. Go to Settings > Service desk.
2. Click the RMM ticket integration tab, and then click Edit.
3. Set your Default SLA, Category, and Priority values and click Save.

Managing email templates

In the Email templates tab you can view all the predefined email templates in Advanced Automation. These templates are used for external communication with end users. You can customize the templates by using either the rich text editor or pasting your custom HTML code into the editor. You cannot add to or delete any of the email templates.

Note
The default email templates are designed to be displayed correctly in most email clients on desktops and mobiles. When making changes, try to ensure the correct display is maintained.

Editing an email template

To edit an email template

1. Go to Settings > Service desk.
2. Click the Email templates tab.
3. Click the pencil icon for the template you want to edit.
4. Update the template as required.
   You can use the following variables for the different message types:

<table>
<thead>
<tr>
<th>Add ticket from email</th>
<th>Update ticket from email</th>
<th>Add ticket from application</th>
<th>Update ticket from application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Body</td>
<td>Subject</td>
<td>Body</td>
</tr>
</tbody>
</table>
5. To customize the email background color, add a style code snippet to the HTML code of your template. Otherwise, the default style will be added when the email message is created.

   Example paragraph style code for a white background:
   
   <p style="background-color: #ffffff;"> [YOUR EMAIL TEMPLATE CONTENT] </p>

6. Click ✓ to save your changes.

---

**Note**

If you make a number of changes to an email template and then want to reset the template to its default layout and text, you will need to reapply the HTML code for that template. For more information, see "Email template defaults" (p. 220)

---

**Email template defaults**

Advanced Automation includes a set of customizable default email templates. If you need to restore a template to its default, you can use the HTML codes of the default templates, provided below.

- Closed solved ticket
- Quote created
- New ticket from email
- Ticket update
- Ticket rating request
- Ticket rating received
- User account created
- Password reset
- Quote processed
- New ticket
- New invoice

**Closed solved ticket**

Subject: Closed solved ticket
**Code:**

```html
<table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;"
bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size: 14px;">
      <td class="container" width="600" style="font-size: 14px; vertical-align: top;">
        <div class="content" style="font-size: 14px;">
          <table class="main" width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px; background-color: #fff;"
bgcotor="#fff">
            <tbody>
              <tr style="font-size: 14px;">
                <td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00a668; text-align: center;"
bgcolor="#00A668">
                  Solved ticket has been closed</td>
              </tr>
              <tr style="font-size: 14px;">
                <td class="content-wrap" style="font-size: 14px; vertical-align: top;">
                  <table width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px;">
                    <tbody>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          Hello [ENDUSER]!
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          Your ticket with reference number [REF] has been closed automatically because it has been in the 'Solved' status for more than [WAITINGDAYS] days.
                        </td>
                      </tr>
                    </tbody>
                  </table>
                </td>
              </tr>
            </tbody>
          </table>
        </div>
      </td>
    </tr>
  </tbody>
</table>

<div class="footer" style="font-size: 14px; width: 100%; color: #999;" />
</div>
```
Quote created

Subject: A new quote with description: [TITLE] has been created for you

Code:

```html
<table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;" bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size: 14px;">
    </tr>
    <tr style="font-size: 14px;">
      <td class="container" width="600" style="font-size: 14px; vertical-align: top;">
        <div class="content" style="font-size: 14px;">
          <table class="main" width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px; background-color: #fff;" bgcolor="#fff">
            <tbody>
              <tr style="font-size: 14px;">
                <td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00A668; text-align: center;" bgcolor="#00A668">A new quote was created for you</td>
              </tr>
              <tr style="font-size: 14px;">
                <td class="content-wrap" style="font-size: 14px; vertical-align: top;">
                  <table width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px;" cellpadding="0" cellspacing="0" style="font-size: 14px;">
                    <tbody>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;" style="font-size: 14px;">
                          Hello [CLIENT]!
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;" style="font-size: 14px;">
                          Please find attached your new quote with description [TITLE] and number [number].
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;" style="font-size: 14px;">
                          Please use the following link to
                        </td>
                      </tr>
                    </tbody>
                  </table>
                </td>
              </tr>
            </tbody>
          </table>
        </div>
      </td>
    </tr>
  </tbody>
</table>
```
review the quote.</td>
</tr>
<tr style="font-size:14px;">
<td class="content-block" style="font-size:14px;vertical-align:top;">
<a href="[QUOTE_LINK]">New Quote</a>
</td>
</tr>
<tr style="font-size:14px;">
<td class="content-block" style="font-size:14px;vertical-align:top;">
<br>
</td>
</tr>
</tbody>
</table>
<div class="footer" style="font-size:14px;width:100%;color:#999;"></div>
</td>
</tr>
</tbody>
</table>

New ticket from email

Subject: New ticket with reference number: [REF]

Code:

<table class="body-wrap" style="font-size:14px;width:100%;background-color:#f6f6f6;" bgcolor="#f6f6f6">
<tbody>
<tr style="font-size:14px;">
<td style="font-size:14px;vertical-align:top;" style="font-size:14px;vertical-align:top;">
</td>
</tr>
</tbody>
</table>
New ticket created from email

<table>
<thead>
<tr>
<th>Ticket Status: [STATUS]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket title: [TITLE]</td>
</tr>
<tr>
<td>Request: [UPDATE]</td>
</tr>
</tbody>
</table>

A support engineer will handle your request as soon as possible.
Ticket update

Subject: New update for your ticket [TITLE] - ref number - [REF]

Code:

```html
<table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;"
bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size: 14px;">
      <td style="font-size: 14px; vertical-align: top;">
        <div class="content" style="font-size: 14px;">
          <table class="main" width="100%" cellpadding="0" cellspacing="0"
style="font-size: 14px; background-color: #fff;"
bgcolor="#fff">
            <tbody>
              <tr style="font-size: 14px;">
                <td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00a668; text-align: center;"
bgcolor="#00A668">Ticket update</td>
              </tr>
              <tr style="font-size: 14px;">
                <td class="content-wrap" style="font-size: 14px; vertical-align: top;">
                  <table width="100%" cellpadding="0" cellspacing="0"
style="font-size: 14px;">
                      <tbody>
                        <tr style="font-size: 14px;">
                          <td class="content-block" style="font-size: 14px; vertical-align: top;">
                            A new update has been made for your ticket with reference number : [REF]
                          </td>
                        </tr>
                        <tr style="font-size: 14px;">
                          <td class="content-block" style="font-size: 14px; vertical-align: top;">
                            Ticket Status : [STATUS]
                          </td>
                        </tr>
                        <tr style="font-size: 14px;">
                          <td class="content-block" style="font-size: 14px; vertical-align: top;">
                            Support engineer message: [UPDATE]
                          </td>
                        </tr>
                      </tbody>
                    </table>
                </td>
              </tr>
            </tbody>
          </table>
        </div>
      </td>
    </tr>
  </tbody>
</table>
```
Ticket rating request

Subject: Ticket rating request

Code:

```
table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;"
bgcolor="#f6f6f6">
  tbody>
  tr style="font-size: 14px;">
  td style="font-size: 14px; vertical-align: top;">
  </tr>
  tr>
  td class="container" width="600" style="font-size: 14px; vertical-align: top;">
  div class="content" style="font-size: 14px;">
  table class="main" width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px; background-color: #fff; bgcolor="#fff">
  tbody>
  tr style="font-size: 14px;">
  td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00a668; text-align: center;" bgcolor="#00A668">We have closed your ticket - Please let us know how we did.</td>
  </tr>
  tr style="font-size: 14px;">
  td class="content-wrap" style="font-size: 14px;">
  table width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px;">
  tbody>
  tr style="font-size: 14px;">
  td class="content-block" style="font-size: 14px; vertical-align: top;">
  Hello [CUSTOMER]!
  </td>
  </tr>
  </tbody>
  </table>
  </div>
  </td>
  </tr>
  </tbody>
  </table>
```
Your ticket with number [REF] has been closed. Please find the details of the ticket here:

<table>
<thead>
<tr>
<th>Ticket reference number:</th>
<th>[REF]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support engineer:</td>
<td>[SUPPORTUSER]</td>
</tr>
<tr>
<td>Support engineer message:</td>
<td>[SUPPORTUSERMESSAGE]</td>
</tr>
<tr>
<td>Initial problem:</td>
<td>[PROBLEM]</td>
</tr>
<tr>
<td>Ticket title:</td>
<td>[TITLE]</td>
</tr>
</tbody>
</table>

How likely is it that you would recommend our company/product/service to a friend or colleague?
<table>
<thead>
<tr>
<th>Rate Value</th>
<th>URL Parameter</th>
<th>Tenant Key</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>?tenant=TENANTKEY&amp;rateValue=0&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>1</td>
<td>?tenant=TENANTKEY&amp;rateValue=1&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>2</td>
<td>?tenant=TENANTKEY&amp;rateValue=2&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>3</td>
<td>?tenant=TENANTKEY&amp;rateValue=3&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>4</td>
<td>?tenant=TENANTKEY&amp;rateValue=4&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>5</td>
<td>?tenant=TENANTKEY&amp;rateValue=5&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>6</td>
<td>?tenant=TENANTKEY&amp;rateValue=6&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>7</td>
<td>?tenant=TENANTKEY&amp;rateValue=7&amp;key=KEY</td>
<td>TENANTKEY</td>
<td>KEY</td>
</tr>
<tr>
<td>Ticket rating received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject: Customer [Customer] rated ticket [REF]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
<table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;" bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size: 14px;">
      <td style="font-size: 14px; vertical-align: top;"></td>
      <td class="container" width="600" style="font-size: 14px; vertical-align: top;">
        <div class="content" style="font-size: 14px;">
          <table class="main" width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px; background-color: #fff;" bgcolor="#fff">
            <tbody>
              <tr style="font-size: 14px;">
                <td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00a668; text-align: center;" bgcolor="#00A668">Your ticket has been rated.</td>
              </tr>
              <tr style="font-size: 14px;">
                <td class="content-wrap" style="font-size: 14px; vertical-align: top;">
                  <table width="100%" cellpadding="0" cellspacing="0" style="font-size: 14px;">
                    <tbody>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          Hello [SUPPORTUSER]!
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          Your ticket with number [REF] has been rated: [GRADE]
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          End user: [CLIENT]
                        </td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;">
                          Customer: [CUSTOMER]
                        </td>
                      </tr>
                    </tbody>
                  </table>
                </td>
              </tr>
            </tbody>
          </table>
        </div>
      </td>
    </tr>
  </tbody>
</table>
**Subject:** User Account Created

**Code:**

```html
<br>
</td>
</tr>
</tbody>
</table>
</td>
</tr>
</tbody>
</table>
</div>
</div>
<td style="font-size:14px;vertical-align:top;"> </td>
</tr>
</tbody>
</table>

User account created

Subject: User Account Created

**Code:**

```html
<table class="body-wrap" style="font-size:14px;width:100%;background-color:#f6f6f6;"
bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size:14px;">
      <td style="font-size:14px;vertical-align:top;"/>
    </tr>
    <tr class="container" width="600" style="font-size:14px;vertical-align:top;">  
      <div class="content" style="font-size:14px;">  
        <table class="main" width="100%" cellpadding="0" cellspacing="0" style="font-size:14px;background-color:#fff;"
bgcolor="#fff">
          <tbody>
            <tr style="font-size:14px;">  
              <td class="alert alert-warning" style="font-size:16px;vertical-align:top;color:#fff;text-align:center;background-color:#00a668;text-align:center;" bgcolor="#00A668">  
                <p>User Account has been Created</p>  
              </td>
            </tr>
            <tr style="font-size:14px;">
              <td class="content-wrap" style="font-size:14px;vertical-align:top;">  
                <table width="100%" cellpadding="0" cellspacing="0" style="font-size:14px;">
                  <tbody>
                    <tr style="font-size:14px;">
                      <td class="alert warning" style="font-size:16px;vertical-align:top;color:#fff;text-align:center;background-color:#00a668;text-align:center;" bgcolor="#00A668">  
                        <p>User Account has been Created</p>  
                      </td>
                    </tr>
                  </tbody>
                </table>
              </td>
            </tr>
          </tbody>
        </table>
      </div>
    </tr>
  </tbody>
</table>
```

231
Your [Customer] user account has been created.

Credentials:

Username: [USERNAME]

Password: [Password]

Go to login
Password reset

You have requested to reset your password.

Your new password is: [Password]

Go to login
Quote processed

Subject: Quote [DESCRIPTION] - [NUMBER] was [ACCEPTED]

Code:

<table class="body-wrap" style="font-size: 14px; width: 100%; background-color: #f6f6f6;" bgcolor="#f6f6f6">
  <tbody>
    <tr style="font-size: 14px;">
      <td style="font-size: 14px; vertical-align: top;" class="container" width="600" style="font-size: 14px; vertical-align: top;">
        <div class="content" style="font-size: 14px;">
          <table class="main" width="100%" cellspacing="0" cellpadding="0" style="font-size: 14px; background-color: #fff;" bgcolor="#fff">
            <tbody>
              <tr style="font-size: 14px;">
                <td class="alert alert-warning" style="font-size: 16px; vertical-align: top; color: #fff; text-align: center; background-color: #00a668; text-align: center;" bgcolor="#00A668">A quote was processed.</td>
              </tr>
              <tr style="font-size: 14px;">
                <td class="content-wrap" style="font-size: 14px; vertical-align: top;">
                  <table width="100%" cellspacing="0" cellpadding="0" style="font-size: 14px;">
                    <tbody>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;" align="left">Hello [CLIENT]!</td>
                      </tr>
                      <tr style="font-size: 14px;">
                        <td class="content-block" style="font-size: 14px; vertical-align: top;" align="left">Please be informed that quote [DESCRIPTION] - [NUMBER] was [ACCEPTED] by [USER].</td>
                      </tr>
                    </tbody>
                  </table>
                </td>
              </tr>
            </tbody>
          </table>
        </div>
      </td>
    </tr>
  </tbody>
</table>
New ticket


Code:

New ticket has been created.
A new ticket has been created for you with the following reference number: [REF]

Ticket Status: [STATUS]

Ticket title: [TITLE]

Request: [UPDATE]

Support engineer/Business unit: [SUPPORTUSER]

New invoice

Subject: Invoice number [number] has been issued

Code:
We have issued a new invoice.

Hello [CUSTOMER]!

Please find attached the invoice with number [number].

Please use one of these links to complete your payment:

Pay with PayPal

Pay with Stripe
Managing email notification templates

The Notification email templates tab enables you to manage the text and layout of notification emails sent by Advanced Automation, for example, when a ticket is updated. These templates are used for communication with your users; for communication with end users, use the email templates described in "Managing email templates" (p. 219).

Users who receive these messages can use them to update the tickets by simply replying to the message. Once the system receives the reply, Advanced Automation updates the ticket and notifies the relevant user.

To manage ticket email notification templates

1. Go to Settings > Service desk.
2. Click the Notification email templates tab.
3. Click the pencil icon of the template you want to edit.
4. Edit as required.
5. Click ✔️ to save your changes.

Defining activities for time tracking

Activities are used for time registrations, which, in turn, help you to understand your timesheets. For example, you can see how much time employees spend on client-related vs non client-related activities, and how much time they spend on billable vs non-billable work.
In more specific cases, for client-related billable activities you can apply specific rates, so that they are automatically applied during a time registration. For example, a unique, more expensive rate can be automatically applied to a time registration for a customer on-site visit.

The **Activities** tab displays a list of current activities. You can add to and edit the listed activities, and activate or deactivate an activity (by clicking the **Status** toggle switch), as required. Deactivating an activity removes it from the list in the **Activities** tab and from the time registration it was added to.

Note that Advanced Automation comes with the following predefined activities by default:

- Bookkeeping
- Contract management
- Lunch break
- Project engineering
- Project management

**Creating an activity**

*To create an activity*

1. Go to **Settings > Service desk.**
2. Click the **Activities** tab, and then click **Add new.**
   A new section is shown at the top of the Activities list.

3. Do the following:
   - Click the **Active** toggle switch to enable the activity (selected by default).
   - Enter a name for the activity, up to a maximum of 50 characters.
   - Enter a description for the activity. This is displayed in the main list of activities shown in the **Activities** tab.
   - Select the relevant product from the **Time Billing Product** drop-down list. When the selected product is used in a contract or sales item, the invoicing process uses its billing rate when the time registration (which includes the relevant activity) is invoiced.
• Click the **Client related** toggle switch to enable it (it is disabled by default). When enabled, this activity's time will be shown as client-related in the **Timesheet report**. When disabled, this activity's time will be shown as internal in the Timesheet report.

4. Click ✓ to save the activity.

The activity is now available for use in tracking timed activities. For example, when you **define a new time registration** you can select the relevant activity to assign to the time registration from the **Activity** field, such as *Project management* or *Lunch break*.

**Editing an activity**

All activities, including the predefined activities that come with Advanced Automation, are editable. You can also deactivate an activity, but you cannot delete an activity.

**To edit an activity**

1. Go to **Settings > Service desk**.
2. Click the **Activities** tab, and then click the pencil icon for the relevant activity.
3. Make the changes you want to the activity. For more details, see "Creating an activity" (p. 239).
   
   Note that you can deactivate the activity by clicking the **Active** toggle switch. This will remove it from the list of activities in the **Activities** tab, and from any time registrations it was added to.
4. Click ✓ to save your changes.

**Defining external ticket integration settings**

If you have set up Advanced Automation to manage external tickets from an RMM platform (for example, Continuum), you can edit the integration settings in the **External ticket integration** tab.

**To edit your external ticket integration settings**

1. Go to **Settings > Service desk**.
2. Click the **External ticket integration** tab.
3. Click **Edit** and update the default settings as required.
4. Click **Save** to save your changes.

**Viewing configuration items**

Configuration items are assets (customer devices) managed by an external RMM platform that are automatically imported into Advanced Automation. You can view the details of these configuration items, and also link them to specific users, in the **Service desk** settings.

**Note**

Synchronization between customer sites and devices and the RMM software may take up to 15 minutes. For example, a new device set up in the RMM platform will become visible in Advanced Automation within 15 minutes. All changes are updated in the Advanced Automation database.

**To view configuration items**
1. Go to **Settings > Service desk**.
2. Click the **Configuration items** tab.
3. Click on the relevant configuration item row. The following read-only details about the configuration item are displayed in the right pane:
   - Device name
   - RMM integration
   - Customer’s site name
   - Description
   - Location
4. To link the configuration item to a specific user, click **Link to user** in the relevant row. Then select the relevant user from the drop-down list, and click **Link**. The configuration item is now linked to the selected user, meaning that any new service desk tickets created by or assigned to the user are automatically linked to the configuration item. To unlink a user from a configuration item, click **Link to user** in the relevant row, and in the displayed right pane, click **Unlink**.

**Billing and quoting settings**

Advanced Automation enables you to fully customize your billing. You can set the layout, the default export format (if you then need to import into another system), and much more. You can customize the look and feel, set up an address, text margins, and add a background image of your choice.

In this section, you can also set up the taxes to use in Advanced Automation, and define your integration with your preferred accounting software (see "Integrating with accounting platforms" (p. 248)).

To access billing and quoting settings, go to **Settings > Billing and quoting**.

**Billing settings**

This section describes how to configure default billing and invoicing settings, including customizing the look and feel of your invoices.

**Defining your default billing settings**

This section describes how to setup your billing and define default settings, including time registration roundup times, and the default tax to use in invoices. These settings are used as the defaults in sales items, invoices, and contracts.

**To configure your billing settings**

1. In the management portal, go to **Settings > Billing and quoting**. The **Billing settings** tab is displayed by default.
2. Click the pencil icon, and modify any of the following default settings:
   - **Time registration roundup time**: Set the time (in minutes) of your ticket roundup time. When ticket work is approved for billing, the total billable hours will be rounded up according
to this value. For example, if you set the roundup time value to 15 minutes, 7 minutes of ticket work will be rounded up to 15 before invoicing. Likewise, 21 minutes will be rounded up to 30, and 36 minutes will be rounded to 45, and so on. The default value is 10.

- **Roundup time for outside business hours**: Set the roundup time of tickets outside, for example, 08:00 to 17:00, which are common business hours. The default value is 20.

- **Discard tickets for approval that have equal or less time recorded than the threshold below**: Enable the toggle switch if you want to discard tickets that do meet your minimum threshold. Define the relevant threshold value in the **Threshold value, minutes** field.

- **Default bookkeeping software**: Select the relevant software from the list of available integrated accounting platforms (see "Integrating with accounting platforms" (p. 248)).

- **Number of days to wait until automatically closed**: Set how many days the system waits before it closes a completed ticket. By default, this is set to 1.

**Note**

Engineers can only set completed tickets to a status of **Completed**. After the set number of days have elapsed, the tickets close automatically. This ensures that when you complete a ticket and an email is sent to the customer, you often get a ‘thank you’ reply from them. However, this reply would reopen the ticket and impact your ‘reopened tickets’ statistics, forcing you to re-close the ticket. This auto-close functionality helps manage this issue. To disable this function, set the value to 0.

- **Default product ledger for export invoice**: Select the default product ledger number to be used for export invoices (the default is 400). The product ledgers displayed in the list are the current ledger numbers available (see "Managing ledgers" (p. 211)).

**Note**

When invoices are exported to your accounting software, they are typically exported as a piece of general information (company, customer, totals) with information about invoice lines (product, description, ledger, quantity, price, total, tax, and so on). This field defines what ledger number will be used by default for a product if it does not have a ledger assigned in its product settings.

- **Default product for ticket time billing**: Select the default product to be used for ticket time billing.

- **Default billing product for block hours**: If you offer block hours to customers, select the default product to be used for block hours.

- **Default sales tax**: Select the default sales tax you want to use from the list of available taxes (see "Tax settings" (p. 247)).

- **Default product for outside business hours**: Select the default product to be used for all billings set for outside business hours.

3. **Click ✓ to apply your changes.**
Adding a new billing entity

Billing entities enable you to send invoices from different legal entities that are part of your business. A default billing entity was created when your account was created. You can also update the details of this billing entity, if this is the only entity you need.

Note
Only users with the Administrator or Director roles can create or update billing entities.

To add a new billing entity

1. In the management portal, go to Sales and billing > Company management.
2. Click the Billing entities tab. The current billing entity is listed.
3. Click + New billing entities.
4. Define the following:
   - Company name: Enter the company name.
   - Bank account number: Enter the relevant bank account number for this entity.
   - Invoice start number: Enter the starting number of the invoices once you start sending invoices to customers.
   - Invoice serial number: This option allows you to keep the same invoice number range if you switch to Advanced Automation in the middle of a fiscal year.
5. (Optional) Enable the Reset invoice numbering toggle switch. This will reset your invoice numbers to the number you set in the Invoice start number field.
6. Enable the Active toggle switch to activate the new billing entity.
7. Click Create. The billing entity is added to the Billing entities tab, and can be selected when generating invoices (see "Generating a new invoice" (p. 201)), and creating sales items (see "Creating a new sales item" (p. 192)) and contracts (see "Creating a new contract" (p. 194)).
   You can update a billing entity as required; click on the relevant billing entity in the Billing entities tab and edit as required. Note that you cannot delete a billing entity.

Customizing the look and feel of invoices

You can fully customize the layout of your invoices and quotes that you send to customers. You can upload your own background image, set your invoice footer text, and set margins for the texts that Advanced Automation adds.

You can use a background image to include details such as your company logo, address, website and email addresses on your invoices.

Note
If you want to start your invoice customization from scratch, you can download an empty template image here. If you already have an invoice layout in PDF, you can convert it to JPG in high-resolution using third party online tools.

To customize your invoice
1. In the management portal, go to **Settings > Billing and quoting**.

2. Click the **Invoice settings** tab.

3. Click the pencil icon to modify any of the following settings:
   
   **Invoice background image**: Drag an image file into the displayed box or click **Browse** to upload your image. The image file should be an A4 size JPEG with a maximum size of 1MB.
   
   **Invoice footer text for automatic debit**: Change the footer text for automatic debit as required. For example, using the variables available in Advanced Automation (see below), your footer text for invoices set with an automatic debit could read as follows:
   
   "Automatic debit with bank account: [BANK_ACCOUNT_NUMBER], customer name > [CUSTOMER_NAME] and VAT number = [VAT_NUMBER]"
   
   This enables customers to pay invoices via wire transfer or by using one of the payment integrations (PayPal, Stripe). They can also send the invoice to their local bank for direct debit processing.
   
   The variables available for automatic debit invoices are:
   
   - [BANK_ACCOUNT_NUMBER]
   - [CUSTOMER_NAME]
   - [VAT_NUMBER]
   - [INVOICE_NUMBER]
   - [INVOICE_DUE_DAYS]
   
   **Invoice footer text for manual debit**: Edit the invoice footer text of your manual debit. For example, the invoice footer text of a manual debit can be as follows (assuming the invoice due days is set to 15 and invoice number is 2022020107): "15-2022020107"
   
   **Invoice due days**: Enter the relevant number of days.
   
   **Hide invoice number prefix**: Enable the toggle switch if you want to hide the invoice number prefix.
   
   **Contract period billable in advance (days)**: Enter the relevant number of days.
   
   **Invoice address position**: Select **Left** or **Right**.

   **Note**
   Before changing the position of your invoice address, make sure your company logo does not overlap.

   - **Margin top**: Enter a value for the space between your company address and the top of the invoice document.

   **Note**
   All margin values are in centimeters.

   - **Margin top for page 2 onwards**: Enter a value for the space between your company address and the top of the invoice document, from page 2 onwards.
   
   - **Margin side**: Enter a value for the space from the left of the invoice document.
• **Address bottom margin**: Enter a value for the space between your company address and the date and invoice number details of the invoice document.

• **Page bottom margin**: Enter a value for the space between the page number and the bottom of the invoice document.

• **Page number position**: Select **Top** or **Bottom**.

• **Page number visibility**: Select from **Display on all pages**, **Hide for first page**, or **Hide it completely**.

4. Click **Download preview** to see a preview of the invoice in PDF format.

5. When done, click **✓**.

When an invoice is generated, the invoice footer is applied automatically, depending on the defined payment method option:

- When direct debit is selected, the **Invoice footer text for automatic debit** option is used.
- If direct debit is not selected, the **Invoice footer text for manual debit** option is used.

**Quoting settings**

This section describes how to configure default quoting settings, including customizing the look and feel of the quote PDF which is sent to customers.

**Defining default quote settings**

When a quote is approved, Advanced Automation automatically creates the following:

- A purchase order ticket for items that first need to be purchased (for example, via a distributor). Note that if an item is already in stock no purchase order ticket will be created.
- A quote ticket to deliver and bill quote items for the customer.

The default quote settings define which support groups each of the above ticket types should be automatically assigned to when they are created. You can also define other quote settings, such as the default category and default payment method for sales items.

**To define default quote settings**

1. In the management portal, go to **Settings > Billing and quoting**.
2. Click the **Quote settings** tab.
3. Click the pencil icon, and modify any of the following default settings:
   - **Group for purchase order tickets**: Select the relevant support group from the drop-down list.
   - **Group for quote tickets**: Select the relevant support group from the drop-down list.
   - **SLA for quote tickets**: Select the relevant SLA from the drop-down list.
   - **Priority for quote tickets**: Select the relevant priority from the drop-down list.
   - **Category for quote tickets**: Select the relevant category from the drop-down list.
   - **Billing entity**: Select the relevant billing entity from the drop-down list.
   - **Send invoice**: Select from **Mail** or **Email**.
   - **Sales item payment method**: Select from **Pay manually** or **Pre-authorized debit**.
• **General conditions**: Add your own general conditions to all quotes. For example, any specific legal terms you want to include.

4. Click ✓ to apply your changes.

### Customizing the look and feel of quote PDFs

This section describes how you can customize the default look and feel of the quote PDFs that are sent to customers. You can upload your own background image, set your quote footer text, and set the margins for the text that Advanced Automation adds automatically. Optionally, you can use a background image to include these items on your quotes:

- Company logo
- Address details
- Bank account number
- Website and email address
- VAT number

**Note**

If you want to start your quote customization from scratch, you can download an empty [template image here](#). If you already have a quote layout in PDF, you can convert it to JPG in high-resolution using third party online tools.

**To customize quote PDFs**

1. In the management portal, go to **Settings > Billing and quoting**.
2. Click the **Quote PDF settings** tab.
3. Click the pencil icon, and modify any of the following default settings:
   - **Quote PDF background image**: Drag an image file into the displayed box or click **Drop or select file to upload** to upload your image. The image file should be an A4 size JPEG with a maximum size of 1MB.
   - **Margin top**: Enter a value for the space between your company address and the top of the quote document.

**Note**

All margin values are in centimeters.

- **Margin top for page 2 and further**: Enter a value for the space between your company address and the top of the quote document, from page 2 onwards.
- **Margin side**: Enter a value for the space from the left of the quote document.
- **Address bottom margin**: Enter a value for the space between your company address and the date and quote number details of the quote document.
- **Page bottom margin**: Enter a value for the space between the page number and the bottom of the quote document.
- **Page number position**: Select **Top** or **Bottom**.
4. Click **Download preview** to see a preview of the quote PDF.
5. When done, click ✓.

**Tax settings**

This section describes how to configure default tax settings for use in your invoices for customers. Taxes are applied to an invoice depending on your location and products sold.

**Adding a tax**

*To add a tax*

1. In the management portal, go to **Settings > Billing and quoting**.
2. Click the **Taxes** tab.
3. Click + **Add new**.
4. Enter the tax code, tax name, and set its value. By default, the tax is set as active.
5. Click ✓ to save the new tax.
   
   The new tax is added to the **Taxes** tab.

**Editing a tax**

You can edit a tax at any time, and activate/deactivate a tax as required. You can also delete a tax.

*To edit a tax*

1. In the management console, go to **Settings > Billing and quoting**.
2. Click the **Taxes** tab.
3. Click the pencil icon of the tax you want to edit, and then modify as required.

   You can click the toggle switch to activate or deactivate the tax.

   **Note**

   To delete a tax, click on the trash can icon. Note that you cannot delete a tax if it is already assigned in the system (for example, as a sales tax).

4. Click ✓ to apply your changes.

**Integrating Advanced Automation with third party platforms**

Advanced Automation can integrate with some of the most popular accounting platforms, RMM tools, VAR, and payment platforms.

The following integrations are currently supported:
• **Accounting integrations**: FreshBooks, QuickBooks, Sage, Xero, and SnelStart
• **RMM integrations**: NinjaOne, Datto RMM, Kaseya VSA, N-able N-central, and N-able RMM
• **VAR integrations**: Microsoft CSP
• **Payment integrations**: PayPal and Stripe

To access your integrations, in the management portal go to **Integrations**.

**Note**
This functionality is only available for users assigned the Administrator role.

**Integrating with accounting platforms**

Advanced Automation enables you to integrate with some of the most popular accounting platforms. This enables you to sync the customers, products, and ledgers stored in your accounting platform with Advanced Automation. It also enables you to get invoices generated in Advanced Automation uploaded to your accounting platform automatically.

To access the accounting integrations, go to **Integrations**. In the displayed left menu, select **Accounting**.

**Integrating with FreshBooks**

This topic describes how to integrate FreshBooks with Advanced Automation.

For information about additional accounting platforms that integrate with Advanced Automation, see "Integrating with accounting platforms" (p. 248).

**Note**
When accessing the management portal using a custom web interface URL, integration with FreshBooks should only be enabled when you are signed-in via the default management portal URL (https://cloud.acronis.com). For more information about branding and custom web interface URLs, see "Configuring custom web interface URLs" (p. 87).

**To integrate FreshBooks with Advanced Automation**

1. Go to **Integrations**, and then select the **Accounting** tab.
2. On the FreshBooks tile, click **Activate**. You are then prompted to activate the authentication process, where you are redirected to the FreshBooks login page.
3. Enter your FreshBooks account credentials to enable the integration.
4. Select the data you want to import from FreshBooks (Customers, Ledgers, Products, and Taxes), and click **Import**.
   
   Note that once the initial integration is complete, every time you click **Import** only new Customers, Ledgers, Products, and Taxes will be imported.
5. Click **Save** to save your integration settings. The integration is now shown in the **Accounting** tab.
To modify your FreshBooks integration settings

1. Go to Integrations, and select the Accounting tab.
2. Click the Integrations in use tab.
3. On the FreshBooks tile, click Configure. Alternatively, click the ellipsis icon (…) and then select Learn more.
4. Modify the settings as required (see above).

To deactivate your FreshBooks integration

1. Go to Integrations, and select the Accounting tab.
2. Click the Integrations in use tab.
3. On the FreshBooks tile, click the ellipsis icon (…) and then select Deactivate.
4. In the displayed confirmation message, click Delete.

Integrating with QuickBooks

This topic describes how to integrate QuickBooks Online with Advanced Automation.

For information about additional accounting platforms that integrate with Advanced Automation, see “Integrating with accounting platforms” (p. 248).

Note

When accessing the management portal using a custom web interface URL, integration with QuickBooks should only be enabled when you are signed-in via the default management portal URL (https://cloud.acronis.com). For more information about branding and custom web interface URLs, see “Configuring custom web interface URLs” (p. 87).

To integrate QuickBooks with Advanced Automation

1. Go to Integrations, and then select the Accounting tab.
2. On the QuickBooks tile, click Activate. You are then prompted to activate the authentication process, where you are redirected to the QuickBooks login page.
3. Enter your QuickBooks account credentials to enable the integration.
4. Select the data you want to import from QuickBooks (Customers, Ledgers, Products, and Taxes), and click Import.
   Note that once the initial integration is complete, every time you click Import only new Customers, Ledgers, Products, and Taxes will be imported.
5. Click Save to save your integration settings. The integration is now shown in the Accounting tab.
Note
When the integration is active, Advanced Automation automatically checks for new invoices every few minutes, and synchronizes them with QuickBooks. The synchronization status can be viewed in the Invoice sync status column in the Invoices screen (go to Sales and billing > Invoices).

<table>
<thead>
<tr>
<th>Name</th>
<th>Invoice sync status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brooklyn Simmons</td>
<td>Integration not active</td>
</tr>
<tr>
<td>Ronald Richards</td>
<td>Success</td>
</tr>
<tr>
<td>Leslie Alexander</td>
<td>Failed Retry</td>
</tr>
<tr>
<td>Theresa Webb</td>
<td>Product “Workstation management” is not registered in QuickBooks.</td>
</tr>
</tbody>
</table>

To modify your QuickBooks integration settings
1. Go to Integrations, and select the Accounting tab.
2. Click the Integrations in use tab.
3. On the QuickBooks tile, click Configure. Alternatively, click the ellipsis icon (…) and then select Learn more.
4. Modify the settings as required (see above).

To deactivate your QuickBooks integration
1. Go to Integrations, and select the Accounting tab.
2. Click the Integrations in use tab.
3. On the QuickBooks tile, click the ellipsis icon (…) and then select Deactivate.
4. In the displayed confirmation message, click Delete.

Integrating with Sage
This topic describes how to integrate Sage Business Cloud with Advanced Automation.

For information about additional accounting platforms that integrate with Advanced Automation, see “Integrating with accounting platforms” (p. 248).

Note
When accessing the management portal using a custom web interface URL, integration with Sage should only be enabled when you are signed-in via the default management portal URL (https://cloud.acronis.com). For more information about branding and custom web interface URLs, see “Configuring custom web interface URLs” (p. 87).

To integrate Sage with Advanced Automation
1. Go to **Integrations**, and then select the **Accounting** tab.
2. On the Sage tile, click **Activate**. You are then prompted to activate the authentication process, where you are redirected to the Sage login page.
3. Enter your Sage account credentials to enable the integration.
4. Select the data you want to import from Sage (Customers, Ledgers, Products, and Taxes), and click **Import**.
   Note that once the initial integration is complete, every time you click **Import** only new Customers, Ledgers, Products, and Taxes will be imported.
5. Click **Save** to save your integration settings. The integration is now shown in the **Accounting integrations** tab.

   **Note**
   When the integration is enabled, Advanced Automation automatically checks for new invoices every few minutes, and synchronizes them with Sage. The synchronization status can be viewed in the **Invoice sync status** column in the **Invoices** screen (go to Sales and billing > Invoices).

**To modify your Sage integration settings**
1. Go to **Integrations**, and select the **Accounting** tab.
2. Click the **Integrations in use** tab.
3. On the Sage tile, click **Configure**. Alternatively, click the ellipsis icon (...) and then select **Learn more**.
4. Modify the settings as required (see above).

**To deactivate your Sage integration**
1. Go to **Integrations**, and select the **Accounting** tab.
2. Click the **Integrations in use** tab.
3. On the Sage tile, click the ellipsis icon (...) and then select **Deactivate**.
4. In the displayed confirmation message, click **Delete**.

**Integrating with Xero**
This topic describes how to integrate Xero with Advanced Automation.

For information about additional accounting platforms that integrate with Advanced Automation, see "Integrating with accounting platforms" (p. 248).

**Note**
When accessing the management portal using a custom web interface URL, integration with Xero should only be enabled when you are signed-in via the default management portal URL (https://cloud.acronis.com). For more information about branding and custom web interface URLs, see "Configuring custom web interface URLs" (p. 87).

**To integrate Xero with Advanced Automation**
1. Go to **Integrations**, and then select the **Accounting** tab.

2. On the Xero tile, click **Activate**. You are then prompted to activate the authentication process, where you are redirected to the Xero login page.

3. Enter your Xero account credentials to enable the integration.

4. Select the data you want to import from Xero (Customers, Ledgers, Products, and Taxes), and click **Import**.
   
   Note that once the initial integration is complete, every time you click **Import** only new Customers, Ledgers, Products, and Taxes will be imported.

5. Click **Save** to save your integration settings. The integration is now shown in the **Accounting** tab.

   **Note**
   When the integration is enabled, Advanced Automation automatically checks for new invoices every few minutes, and synchronizes them with Xero. The synchronization status can be viewed in the **Invoice sync status** column in the **Invoices** screen (go to Sales and billing > Invoices).

**To modify your Xero integration settings**

1. Go to **Integrations**, and select the **Accounting** tab.

2. Click the **Integrations in use** tab.

3. On the Xero tile, click **Configure**. Alternatively, click the ellipsis icon (...) and then select **Learn more**.

4. Modify the settings as required (see above).

**To deactivate your Xero integration**

1. Go to **Integrations**, and select the **Accounting** tab.

2. Click the **Integrations in use** tab.

3. On the Xero tile, click the ellipsis icon (...) and then select **Deactivate**.

4. In the displayed confirmation message, click **Delete**.

**Integrating with SnelStart**

This topic describes how to integrate SnelStart with Advanced Automation.

For information about additional accounting platforms that integrate with Advanced Automation, see "Integrating with accounting platforms" (p. 248).

**Note**

When accessing the management portal using a custom web interface URL, integration with SnelStart should only be enabled when you are signed-in via the default management portal URL (https://cloud.acronis.com). For more information about branding and custom web interface URLs, see "Configuring custom web interface URLs" (p. 87).

**To integrate SnelStart with Advanced Automation**
1. Go to **Integrations**, and then select the **Accounting** tab.
2. On the SnelStart tile, click **Activate**. You are then prompted to activate the authentication process, where you are redirected to the SnelStart login page.
3. Enter your SnelStart account credentials to enable the integration.
4. Select the data you want to import from SnelStart (Customers, Ledgers, Products, and Taxes), and click **Import**.
   
   Note that once the initial integration is complete, every time you click **Import** only new Customers, Ledgers, Products, and Taxes will be imported.
5. Click **Save** to save your integration settings. The integration is now shown in the **Integrations in use** tab.

**Note**

When the integration is enabled, Advanced Automation automatically checks for new invoices every few minutes, and synchronizes them with SnelStart. The synchronization status can be viewed in the **Invoice sync status** column in the **Invoices** screen (go to **Sales and billing > Invoices**).

**To modify your SnelStart integration settings**

1. Go to **Integrations**, and select the **Accounting** tab.
2. Click the **Integrations in use** tab.
3. On the SnelStart tile, click **Configure**. Alternatively, click the ellipsis icon (...) and then select **Learn more**.
4. Modify the settings as required (see above).

**To deactivate your SnelStart integration**

1. Go to **Integrations**, and select the **Accounting** tab.
2. Click the **Integrations in use** tab.
3. On the SnelStart tile, click the ellipsis icon (...) and then select **Deactivate**.
4. In the displayed confirmation message, click **Delete**.

**Note**

When deactivated, Advanced Automation still keeps all the Customers, Ledgers, Products and Taxes, so you can still continue to use them. However, new invoices in Advanced Automation will no longer be synchronized with the accounting platform.

**Integrating with RMM platforms**

Advanced Automation enables you to integrate with RMM (Remote Monitoring and Management) platforms. This enables you to automate ticket creation and management and align customer billing with managed customer assets.

To access the RMM integrations, go to **Integrations**. In the displayed left menu, select **RMM/PSA**.
Note that when setting up your integration, ensure your RMM software remains open as you will need its URL and keys to complete the integration.

**Integrating with NinjaOne**

By integrating Advanced Automation with NinjaOne, you can:

- Automatically import customer sites and devices from NinjaOne.
- Map customers to sites from NinjaOne.
- Create tickets from NinjaOne alerts.
- Access the NinjaOne device page from a ticket.
- Bill customers for the actual number of devices from NinjaOne.

NinjaOne supports OAuth 2.0 authentication, which is applicable for all new integrations. If you have an integration that was set up with an Access Key ID and Secret Access Key, it needs to be updated manually.

**Note**

In order to successfully integrate NinjaOne with Advanced Automation, the Advanced Automation service must be enabled. You must also have a fully configured NinjaOne account.

**Setting up the NinjaOne integration**

There are two main steps in setting up your NinjaOne integration with Advanced Automation, as described in the procedures below:

1. **Defining the integration settings to connect with the NinjaOne instance.**
2. **Mapping NinjaOne customers to Advanced Automation.**

**To define integration settings**

1. In the management portal, go to **Integrations**. In the displayed list of integrations, select **RMM/PSA**.
2. On the **NinjaOne** tile, click **Configure**.
3. Enter the relevant NinjaOne credentials to access the NinjaOne instance. For more information, see here.

**Note**

NinjaOne supports OAuth 2.0 authentication, which is applicable for all new integrations. If you have an integration that was set up with an Access Key ID and Secret Access Key, it needs to be updated manually.

4. After the credentials have been defined, the next step in setting up your integration is to map the NinjaOne customers with existing or new Advanced Automation customers, as described below.

**To map NinjaOne customers**
1. In the management portal, go to **Integrations**, and then select **RMM/PSA**.

2. On the **NinjaOne** tile, click **Configure**.

3. In the **Customer mapping** tab, click **Create Acronis customers from NinjaOne sites**. The mapping process is started for all the listed NinjaOne sites.

   All customers (customer sites) from NinjaOne are registered as new customers in Cyber Protect Cloud, complete with all available services granted.

   You can also select individual NinjaOne sites and map them to existing Cyber Protect Cloud customers; select the relevant site(s), and then click **Map to existing customer tenant**. You are then prompted to select an existing customer. Once selected, click **Map** to complete the mapping process.

4. When complete, the **Mapping** column displays **Mapped**, and the **Acronis customer** column displays the relevant customer name.

   **Note**
   To remove a mapping, select the relevant row that is currently mapped, and then click **Remove mapping**. In the displayed confirmation popup, click **Remove**.

**Reviewing and editing NinjaOne integration settings**

You can review and edit your NinjaOne integration settings, as required. You can also delete the NinjaOne integration.

**To review and edit NinjaOne integration settings**

1. In the management portal, go to **Integrations**, and then select **RMM/PSA**.

2. Click the **Integrations in use** tab. On the **NinjaOne** tile, you can view the current status of the integration.

3. Click **Configure** to view and edit integration settings.

   For example, you can view and edit credentials and alert settings in the **Integration settings** tab, and NinjaOne customers mapped to Advanced Automation in the **Customer mapping** tab.

4. Click the pencil icon to edit the relevant section. For more information about the editable fields, see "Setting up the NinjaOne integration" (p. 254).

5. When done, click ✔.

**To delete the NinjaOne integration**
1. Go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab.
3. In the top right corner of the **NinjaOne** tile, click the ellipsis icon (...), and then select **Delete**.
4. In the displayed confirmation message, click **Delete**.

**Creating tickets from NinjaOne open alerts**

When integration with NinjaOne is configured (see "Setting up the NinjaOne integration" (p. 254)), Advanced Automation automatically creates new tickets from NinjaOne open alerts. Tickets are kept in sync with NinjaOne, ensuring that open alerts already linked with tickets in Advanced Automation are ignored.

Note the following:

- Tickets are only created for customers that are mapped to NinjaOne customer sites.
- Ticket parameters are defined with the default settings for the relevant customer (as described in "Setting default values" (p. 217)).
- The ticket summary and description is taken from the alert's summary and description.
- The ticket includes links to the Cyber Protect Cloud customer, the customer user (via the user's email address, if provided by NinjaOne), and devices linked to the user (if relevant; devices can be viewed by users in the Cyber Protect console).
- If a ticket is linked to a user's device, a link is included to the Device Information section in NinjaOne.

For more information about creating a ticket, see "Creating a new ticket" (p. 171).

**Adding external NinjaOne devices to contracts**

When integration with NinjaOne is configured (see "Setting up the NinjaOne integration" (p. 254)), you can add external devices to contracts for customers in Advanced Automation.

- You can link a specific contract part to the NinjaOne integration. This is done in the contract parts section of a contract; select the relevant integration, group/site, and workload type, and then select the relevant configuration items.
- In the contract parts section of a contract you can select **Automatic update** to update the device quantity for the contract part.
- You can also select **Show workloads on invoice** to add information about specific devices to customer invoices.

For more information about defining contracts and adding devices to contracts, see "Working with contracts" (p. 194).

**Integrating with Datto RMM**

By integrating Advanced Automation with Datto RMM, you can:

- Automatically import customer sites and devices from Datto RMM.
- Map customers to sites from Datto RMM.
Create tickets from Datto RMM alerts.
Access the Datto RMM device page from a ticket.
Connect remotely to a Datto RMM device from a ticket.
Bill customers for the actual number of devices using Datto RMM.

Note
In order to successfully integrate Datto RMM with Advanced Automation, the Advanced Automation service must be enabled. You must also have a fully configured Datto RMM account.

Setting up the Datto RMM integration
There are two main steps in setting up your Datto RMM integration with Advanced Automation, as described in the procedures below:

1. Defining the integration settings to connect with the Datto RMM instance.

To define integration settings
1. In the management portal, go to Integrations. In the displayed list of integrations, select RMM/PSA.
2. On the Datto RMM tile, click Configure.
3. Enter the following Datto RMM credentials to access the Datto RMM instance:
   - **Datto RMM Server**: Enter the URL of the Datto RMM server.
   - **API Key**: Enter the unique API Key for your Datto RMM account.
   - **API Secret**: Enter the unique API Secret for your Datto RMM account.
     All of the above credentials are created in your Datto RMM account. To generate them, first login to your Datto RMM account. Go to Setup > Account Settings > Access Control, and set Enable API Access to ON. Then click the Users tab, and click on the user you want to enable API access for. The copy the displayed URL, API Key, and API Secret.
4. (Optional) Click Test connection to test the entered credentials.
5. Click Next.
6. If you want Datto RMM alerts to be synchronized to tickets in Advanced Automation automatically, ensure the Create tickets from Datto RMM alerts check box is selected (it is selected by default).
7. Select the Ignore muted alerts check box if you don't want to synchronize Datto RMM alerts that are of the "muted" type. The check box is selected by default.
8. Click Save. The next step in setting up your integration is to map the Datto RMM customers with existing or new Advanced Automation customers, as described below.

To map Datto RMM customers
1. In the management portal, go to Integrations, and then select RMM/PSA.
2. On the Datto RMM tile, click Open integration.
3. In the **Customer mapping** tab, click **Create Acronis customers from Datto RMM sites**. The mapping process is started for all the listed Datto RMM sites. All customers (customer sites) from Datto RMM are registered as new customers in Cyber Protect Cloud, complete with all available services granted. You can also select individual Datto RMM sites and map them to existing Cyber Protect Cloud customers; select the relevant site(s), and then click **Map to existing customer tenant**. You are then prompted to select an existing customer. Once selected, click **Map** to complete the mapping process.

4. When complete, the **Mapping** column displays **Mapped**, and the **Acronis customer** column displays the relevant customer name.

**Note**
To remove a mapping, select the relevant row that is currently mapped, and then click **Remove mapping**. In the displayed confirmation popup, click **Remove**.

### Reviewing and editing Datto RMM integration settings

You can review and edit your Datto RMM integration settings, as required. You can also delete the Datto RMM integration.

#### To review and edit Datto RMM integration settings

1. In the management portal, go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab. On the Datto RMM tile, you can view the current status of the integration, and the number of linked accounts.
3. Click **Open integration** to view and edit integration settings.
   - For example, you can view and edit credentials and alert settings in the **Integration settings** tab, and Datto RMM customers mapped to Advanced Automation in the **Customer mapping** tab.
4. Click the pencil icon to edit the relevant section. For more information about the editable fields, see "Setting up the Datto RMM integration" (p. 257).
5. When done, click ✓.

#### To delete the Datto RMM integration

1. Go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab.
3. In the top right corner of the Datto RMM tile, click the ellipsis icon (...), and then select **Delete**.
4. In the displayed confirmation message, click **Delete**.

### Creating tickets from Datto RMM alerts

When integration with Datto RMM is configured (see "Setting up the Datto RMM integration" (p. 257)), Advanced Automation automatically creates new tickets from Datto RMM alerts. Tickets are kept in sync with Datto RMM, ensuring that open alerts already linked with tickets in Advanced Automation are ignored.
Note the following:

- Tickets are only created for customers that are mapped to Datto RMM customer sites.
- Ticket parameters are defined with the default settings for the relevant customer (as described in "Setting default values" (p. 217)).
- The ticket summary and description is taken from the alert's summary and description.
- The ticket includes links to the Cyber Protect Cloud customer, the customer user (via the user's email address, if provided by Datto RMM), and devices linked to the user (if relevant; devices can be viewed by users in the Cyber Protect console).
- If a ticket is linked to a user's device, a link is included to the Device Information section in Datto RMM. Additionally, if provided by Datto RMM, a link to initiate a remote connection is included.

For more information about creating a ticket, see "Creating a new ticket" (p. 171).

Adding external Datto RMM devices to contracts

When integration with Datto RMM is configured (see "Setting up the Datto RMM integration" (p. 257)), you can add external devices to contracts for customers in Advanced Automation.

- You can link a specific contract part to the Datto RMM integration. This is done in the contract parts section of a contract; select the relevant integration, group/site, and workload type, and then select the relevant configuration items.
- In the contract parts section of a contract you can select **Automatic update** to update the device quantity for the contract part.
- You can also select **Show workloads on invoice** to add information about specific devices to customer invoices.

For more information about defining contracts and adding devices to contracts, see "Working with contracts" (p. 194).

Integrating with Kaseya VSA

By integrating Advanced Automation with Kaseya VSA using the existing Cyber Protect plug-in, you can:

- Automatically import customer sites and devices from Kaseya VSA.
- Map customers to sites from Kaseya VSA.
- Create tickets from Kaseya VSA alerts.
- Access the Kaseya VSA device page from a ticket.
- Connect remotely to a Kaseya VSA device from a ticket.
- Bill customers for the actual number of devices using Kaseya VSA.

**Note**

In order to successfully integrate Kaseya VSA with Advanced Automation, the Advanced Automation service must be enabled. For more information about using the existing Cyber Protect plug-in for Kaseya VSA, see this guide.
Integrating with N-able N-central

By integrating Advanced Automation with N-able N-central, you can:

- Automatically import customer sites and devices from N-able N-central.
- Map customers to sites from N-able N-central.
- Create tickets from N-able N-central alerts.
- Sync tickets between Advanced Automation and N-able N-central.
- Access the N-able N-central device page from a ticket.
- Bill customers for the actual number of devices from N-able N-central.

Note
In order to successfully integrate N-able N-central with Advanced Automation, the Advanced Automation service must be enabled. You must also have a fully configured N-able N-central account.

Setting up the N-able N-central integration

There are two main steps in setting up your N-able N-central integration with Advanced Automation, as described in the procedures below:

1. Defining the integration settings to connect with the N-able N-central instance.

To define integration settings

1. In the management portal, go to Integrations. In the displayed list of integrations, select RMM/PSA.
2. On the N-able N-central tile, click Configure.
3. Enter the following N-able N-central credentials to access the N-able N-central instance:
   - URL
   - Username
   - Password
4. (Optional) Click Test connection to test the entered credentials.
5. Click Next.
6. If you want N-able N-central alerts to be synchronized to tickets in Advanced Automation automatically, ensure the Ticket integration check box is selected (it is selected by default).
7. Click Save. The next step in setting up your integration is to map the N-able N-central customers with existing or new Advanced Automation customers, as described below.

To map N-able N-central customers

1. In the management portal, go to Integrations, and then select RMM/PSA.
2. On the N-able N-central tile, click Configure.
3. In the **Customer mapping** tab, click **Create Acronis customers from N-able N-central sites**.
   The mapping process is started for all the listed N-able N-central sites.
   All customers (customer sites) from N-able N-central are registered as new customers in Cyber Protect Cloud, complete with all available services granted.
   You can also select individual N-able N-central sites and map them to existing Cyber Protect Cloud customers; select the relevant site(s), and then click **Map to existing customer tenant**.
   You are then prompted to select an existing customer. Once selected, click **Map** to complete the mapping process.
4. When complete, the **Mapping** column displays **Mapped**, and the **Acronis customer** column displays the relevant customer name.

### Note
To remove a mapping, select the relevant row that is currently mapped, and then click **Remove mapping**. In the displayed confirmation popup, click **Remove**.

### Reviewing and editing N-able N-central integration settings
You can review and edit your N-able N-central integration settings, as required. You can also delete the N-able N-central integration.

**To review and edit N-able N-central integration settings**
1. In the management portal, go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab. On the **N-able N-central** tile, you can view the current status of the integration, and the number of linked accounts.
3. Click **Configure** to view and edit integration settings.
   For example, you can view and edit credentials and alert settings in the **Integration settings** tab, and N-able N-central customers mapped to Advanced Automation in the **Customer mapping** tab.
4. Click the pencil icon to edit the relevant section. For more information about the editable fields, see "Setting up the N-able N-central integration" (p. 260).
5. When done, click ✔.

**To delete the N-able N-central integration**
1. Go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab.
3. In the top right corner of the **N-able N-central** tile, click the ellipse icon (…), and then select **Delete**.
4. In the displayed confirmation message, click **Delete**.

### Creating tickets from N-able N-central alerts
When integration with N-able N-central is configured (see "Setting up the N-able N-central integration" (p. 260)), Advanced Automation automatically creates new tickets from N-able N-central
alerts. Tickets are kept in sync with N-able N-central, ensuring that open alerts already linked with tickets in Advanced Automation are ignored.

Note the following:

- Tickets are only created for customers that are mapped to N-able N-central customer sites.
- Ticket parameters are defined with the default settings for the relevant customer (as described in "Setting default values“ (p. 217)).
- The ticket summary and description is taken from the alert's summary and description.
- The ticket includes links to the Cyber Protect Cloud customer, the customer user (via the user's email address, if provided by N-able N-central), and devices linked to the user (if relevant; devices can be viewed by users in the Cyber Protect console).
- If a ticket is linked to a user's device, a link is included to the device information section in N-able N-central.

For more information about creating a ticket, see "Creating a new ticket“ (p. 171).

Adding external N-able N-central devices to contracts

When integration with N-able N-central is configured (see "Setting up the N-able N-central integration“ (p. 260)), you can add external devices to contracts for customers in Advanced Automation.

- You can link a specific contract part to the N-able N-central integration. This is done in the contract parts section of a contract; select the relevant integration, group/site, and workload type, and then select the relevant configuration items.
- In the contract parts section of a contract you can select Automatic update to update the device quantity for the contract part.
- You can also select Show workloads on invoice to add information about specific devices to customer invoices.

For more information about defining contracts and adding devices to contracts, see "Working with contracts“ (p. 194).

Integrating with N-able RMM

By integrating Advanced Automation with N-able RMM, you can:

- Automatically import customer sites and devices from N-able RMM.
- Map customers to sites from N-able RMM.
- Create tickets from N-able RMM alerts.
- Bill customers for the actual number of devices from N-able RMM.

Note

In order to successfully integrate N-able RMM with Advanced Automation, the Advanced Automation service must be enabled. You must also have a fully configured N-able RMM account.
Setting up the N-able RMM integration

There are two main steps in setting up your N-able RMM integration with Advanced Automation, as described in the procedures below:

1. Defining the integration settings to connect with the N-able RMM instance.
2. Mapping N-able RMM customers to Advanced Automation.

To define integration settings

1. In the management portal, go to Integrations. In the displayed list of integrations, select RMM/PSA.
2. On the N-able RMM tile, click Configure.
3. Enter the following N-able RMM credentials to access the N-able RMM instance:
   - URL
   - API key
4. (Optional) Click Test connection to test the entered credentials.
5. Click Next.
6. If you want N-able RMM alerts to be synchronized to tickets in Advanced Automation automatically, ensure the Ticket integration check box is selected (it is selected by default).
7. Click Save. The next step in setting up your integration is to map the N-able RMM customers with existing or new Advanced Automation customers, as described below.

To map N-able RMM customers

1. In the management portal, go to Integrations, and then select RMM/PSA.
2. On the N-able RMM tile, click Configure.
3. In the Customer mapping tab, click Create Acronis customers from N-able RMM sites. The mapping process is started for all the listed N-able RMM sites.
   All customers (customer sites) from N-able RMM are registered as new customers in Cyber Protect Cloud, complete with all available services granted.
   You can also select individual N-able RMM sites and map them to existing Cyber Protect Cloud customers; select the relevant site(s), and then click Map to existing customer tenant. You are then prompted to select an existing customer. Once selected, click Map to complete the mapping process.
4. When complete, the Mapping column displays Mapped, and the Acronis customer column displays the relevant customer name.

Note
To remove a mapping, select the relevant row that is currently mapped, and then click Remove mapping. In the displayed confirmation popup, click Remove.
Reviewing and editing N-able RMM integration settings

You can review and edit your N-able RMM integration settings, as required. You can also delete the N-able RMM integration.

**To review and edit N-able RMM integration settings**

1. In the management portal, go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab. On the **N-able RMM** tile, you can view the current status of the integration, and the number of linked accounts.
3. Click **Configure** to view and edit integration settings.
   - For example, you can view and edit credentials and alert settings in the **Integration settings** tab, and N-able RMM customers mapped to Advanced Automation in the **Customer mapping** tab.
4. Click the pencil icon to edit the relevant section. For more information about the editable fields, see "Setting up the N-able RMM integration" (p. 263).
5. When done, click **✓**.

**To delete the N-able RMM integration**

1. Go to **Integrations**, and then select **RMM/PSA**.
2. Click the **Integrations in use** tab.
3. In the top right corner of the **N-able RMM** tile, click the ellipsis icon (...), and then select **Delete**.
4. In the displayed confirmation message, click **Delete**.

Creating tickets from N-able RMM alerts

When integration with N-able RMM is configured (see "Setting up the N-able RMM integration" (p. 263)), Advanced Automation automatically creates new tickets from N-able RMM alerts. Tickets are kept in sync with N-able RMM, ensuring that open alerts already linked with tickets in Advanced Automation are ignored.

Note the following:

- Tickets are only created for customers that are mapped to N-able RMM customer sites.
- Ticket parameters are defined with the default settings for the relevant customer (as described in "Setting default values" (p. 217)).
- The ticket summary and description is taken from the alert's summary and description.
- The ticket includes links to the Cyber Protect Cloud customer, the customer user (via the user's email address, if provided by N-able RMM), and devices linked to the user (if relevant; devices can be viewed by users in the Cyber Protect console).
- If a ticket is linked to a user’s device, a link is included to the device information section in N-able RMM.

For more information about creating a ticket, see "Creating a new ticket" (p. 171).
Adding external N-able RMM devices to contracts

When integration with N-able RMM is configured (see "Setting up the N-able RMM integration" (p. 263)), you can add external devices to contracts for customers in Advanced Automation.

- You can link a specific contract part to the N-able RMM integration. This is done in the contract parts section of a contract; select the relevant integration, group/site, and workload type, and then select the relevant configuration items.
- In the contract parts section of a contract you can select Automatic update to update the device quantity for the contract part.
- You can also select Show workloads on invoice to add information about specific devices to customer invoices.

For more information about defining contracts and adding devices to contracts, see "Working with contracts" (p. 194).

Integrating with VAR platforms

**Note**
This feature is only available for users assigned the Administrator role.

Advanced Automation enables you to integrate with VAR (value-added reseller) platforms (currently only Microsoft CSP is supported). This enables you to access your customers' subscription usage data from third party vendors and, in turn, track, bill and invoice your customers in Advanced Automation, as required.

To access the VAR integrations, go to Integrations. In the displayed left menu, select Cloud vendors.

Integrating with Microsoft CSP

By integrating Advanced Automation with Microsoft CSP, you can:

- Automatically import customers from the Microsoft CSP partner portal.
- Automatically import subscriptions and their usage data from the Microsoft CSP partner portal.
- Bill customers for actual Microsoft CSP subscriptions usage.

In order to successfully integrate Microsoft CSP with Advanced Automation, the Advanced Automation service must be enabled. You must also have a fully configured Microsoft CSP account.

Note that Microsoft has two basic partner levels that allow service providers to resell Microsoft CSP services and licenses to end customers: Tier-1 and Tier-2.

- Tier-1 refers to partners that buy directly from Microsoft. For example, all distributors that sell Microsoft CSP program subscriptions are Tier-1 partners.
- Tier-2 refers to partners that buy Microsoft CSP program subscriptions from a distributor (Tier-1 partner).
Partners manage their Microsoft CSP services and licenses in one central console, the Microsoft partner portal, regardless of where they purchased the services and licenses.

**Note**
Advanced Automation currently supports Tier-1 partners only.

**To define integration settings**
1. In the management portal, go to **Integrations**. In the displayed list of integrations, select **Cloud vendors**.
2. On the **Microsoft CSP** tile, click **Activate**.
3. Enter the following Microsoft CSP credentials to access the Microsoft CSP account:
   - **App ID**: Enter the unique App ID for your Microsoft CSP account.
   - **Secret Key**: Enter the unique Secret Key for your Microsoft CSP account. The Secret Key is generated together with the App ID (see above).
   - **Domain**: Enter the relevant domain.
4. (Optional) Click **Test connection** to test the entered credentials.
5. Click **Save**.
   
   After defining the integration, you can then define a contract part (see "Creating a new contract" (p. 194)) and select a customer from Microsoft CSP to get the correct usage data from the relevant customer.

**Reviewing and editing Microsoft CSP integration settings**

You can review and edit your Microsoft CSP integration settings, as required. You can also delete the Microsoft CSP integration.

**To review and edit Microsoft CSP integration settings**
1. In the management portal, go to **Integrations**, and then select **Cloud vendors**.
2. Click the **Integrations in use** tab. On the **Microsoft CSP** tile, you can view the current status of the integration.
3. Click **Configure** to view and edit integration settings.
4. Click the pencil icon to edit the relevant field. For more information about the editable fields, see "Integrating with Microsoft CSP" (p. 265).
5. When done, click ✓.

**To delete the Microsoft CSP integration**
1. Go to **Integrations**, and then select **Cloud vendors**.
2. Click the **Integrations in use** tab.
3. In the top right corner of the **Microsoft CSP** tile, click the ellipsis icon (...), and then select **Delete**.
4. In the displayed confirmation message, click **Delete**.
Using Microsoft CSP usage data in contracts

When integration with Microsoft CSP is configured (see "Integrating with Microsoft CSP" (p. 265)), you can add Microsoft CSP usage data to contracts for customers in Advanced Automation.

Note the following:

- You can link a specific contract part to the Microsoft CSP integration.
- You can filter license types from Microsoft CSP by:
  - **VAR Group**: Select the relevant customer from the list of customers on the Microsoft CSP partner portal in order to filter licenses related only to a specific customer.
  - **License Type**: Select from the available license types from the Microsoft CSP partner portal.
- The **Automatic update** check box in the Contract parts section of the creating a contract wizard is enabled by default and hidden: it automatically disables the **Quantity** field. When configured, Advanced Automation synchronizes the actual usage data to this field, so you can bill for the actual license usage.

For more information about defining contracts, see "Working with contracts" (p. 194).

**Note**

When you generate an invoice for a customer with Microsoft CSP license usage, it automatically includes the relevant lines for used license types, with the correct quantity and price.

Integrating with payment platforms

Advanced Automation enables you to integrate with various payment platforms (currently only PayPal and Stripe are supported). This enables you to send invoices that include links that customers can click to pay using the relevant platform.

To access the payment platform integrations, go to Integrations. In the displayed left menu, select Payments.

**Integrating with PayPal**

Advanced Automation's integration with the PayPal payment gateway enables you to automate the collection and tracking of payments from customers.

For information about additional payment platforms that integrate with Advanced Automation, see "Integrating with payment platforms" (p. 267).

**To integrate with PayPal**

1. Go to Integrations, and then select the Payments tab.
2. On the PayPal tile, click Activate.
3. Enter the following PayPal credentials:
   - API Username
   - API Password
• Signature
For more information about getting the above credentials from PayPal, see "How to access your PayPal API username, password, and signature information" (p. 268).

4. Click Save.
You can now include a link to pay by PayPal in invoices sent to customers, as shown below. For more information about defining this link in the "New invoice" email template, see "Managing email templates" (p. 219).

To modify your PayPal integration settings
1. Go to Integrations, and select the Payments tab.
2. On the PayPal tile, click the ellipsis icon (...) and then select Settings.
3. Modify the settings as required (see above).

To delete your PayPal integration
1. Go to Integrations, and select the Payments tab.
2. On the PayPal tile, click the ellipsis icon (...) and then select Delete.
3. In the displayed confirmation message, click Delete.

How to access your PayPal API username, password, and signature information
In order to integrate Advanced Automation with PayPal (see "Integrating with PayPal" (p. 267)), you need to define the PayPal API username, password, and signature in the integration settings. These credentials are located in your PayPal account settings, as described below.

To get your PayPal API username, password and signature information
1. Login to your PayPal account.
2. From the main menu, go to Tools > All Tools.
3. Scroll down the page and click API Credentials.
4. Click NVP/SOAP integration.
Note
If this is your first time creating API credentials, a Request API credentials link is displayed under the NVP/SOAP API integration. Complete the API Credential Request form, select the agreement check box, and click Submit.

5. Click the Show link on each corresponding entity and take note of the displayed credentials. They can then be used when defining your integration settings, as described in "Integrating with PayPal" (p. 267).

Integrating with Stripe
Advanced Automation's integration with the Stripe payment gateway enables you to automate the collection and tracking of payments from customers.

For information about additional payment platforms that integrate with Advanced Automation, see "Integrating with payment platforms" (p. 267).

To integrate with Stripe
1. Go to Integrations, and then select the Payments tab.
2. On the Stripe tile, click Activate.
3. Enter the following Stripe credentials:
   - Secret Key
   - Publishable Key
   For more information about getting the above credentials from Stripe, see "How to access your Stripe secret and publishable keys" (p. 270).
4. Click Save.
   You can now include a link to pay by Stripe in invoices sent to customers, as shown below. For more information about defining this link in the "New invoice" email template, see "Managing email templates" (p. 219).

To modify your Stripe integration settings
1. Go to **Integrations**, and select the **Payments** tab.
2. On the Stripe tile, click the ellipsis icon (…) and then select **Settings**.
3. Modify the settings as required (see above).

**To delete your Stripe integration**

1. Go to **Integrations**, and select the **Payments** tab.
2. On the Stripe tile, click the ellipsis icon (…) and then select **Delete**.
3. In the displayed confirmation message, click **Delete**.

**How to access your Stripe secret and publishable keys**

In order to integrate Advanced Automation with Stripe (see "Integrating with Stripe" (p. 269)), you need to define the Stripe secret key and publishable key in the integration settings. These credentials are located in your Stripe account settings, as described below.

**To get your Stripe secret and publishable keys**

1. Login to your Stripe account.
2. Go to **Developers > API keys**.
3. If this is your first time getting your secret key, click **Reveal test key token** to generate the key.
4. Take note of the displayed credentials. They can then be used when defining your integration settings, as described in "Integrating with Stripe" (p. 269).

**Canceling the Advanced Automation service**

You can cancel the Advanced Automation service if you no longer want to use the functionality included in Advanced Automation.

**Important**

When you cancel the Advanced Automation service, all Advanced Automation data is removed and cannot be restored.

**To cancel the Advanced Automation service**

1. In the management portal, click **Settings > Billing and quoting**.
2. Click the **My subscription** tab.
   - The displayed tab includes details on the number of current Advanced Automation users.
3. Click **Cancel Advanced Automation service**.
4. In the displayed confirmation message, click **Confirm**.
Integrations

Integration with third-party systems

A service provider can integrate Cyber Protect Cloud with a third-party system as follows:

- **By setting up a platform extension in this system.**
  
  The Integration page of the management portal lists extensions available for the most popular Professional Services Automations (PSA) and Remote Monitoring and Management (RMM) systems.

  This is the recommended way of integrating the platform.

- **By creating an API client for the system** and thus enabling the system to access the application programming interfaces (APIs) of the platform and its services. API clients are part of the OAuth 2.0 authorization framework of the platform. For more information about OAuth 2.0, see https://tools.ietf.org/html/rfc6749.

  This is a low-level way of integrating the platform that requires programming skills. We recommend choosing it when there is no platform extension for the system or the system is to be customized for such cases of managing the platform and its services that are not covered by the available extension.

**Setting up an integration for Cyber Protect Cloud**

1. Log in to the management portal.
2. Go to Integrations in the main navigation menu.
3. Click the name of the third-party system with which you want to enable the integration.
4. Follow the on-screen instructions.


**Managing API clients**

Third-party systems can be integrated with Cyber Protect Cloud by using its application programming interfaces (APIs). Access to these APIs is enabled via API clients, an integral part of the OAuth 2.0 authorization framework of the platform.

**What is an API client?**

An API client is a special platform account intended to represent a third-party system that needs to authenticate and be authorized to access data in the APIs of the platform and its services.

The client’s access is limited to a tenant, where an administrator creates the client, and its sub-tenants.
When being created, the client inherits the service roles of the administrator account and these roles cannot be changed later. Changing roles of the administrator account or disabling it does not affect the client.

The client credentials consist of the unique identifier (ID) and secret value. The credentials do not expire and cannot be used to log in to the management portal or any service console. The secret value can be reset.

It is not possible to enable two-factor authentication for the client.

**Typical integration procedure**

1. An administrator creates an API client in a tenant that a third-party system will manage.
2. The administrator enables the OAuth 2.0 client credentials flow in the third-party system. According to this flow, before accessing the tenant and its services via the API, the system should first send the credentials of the created client to the platform by using the authorization API. The platform generates and sends back a security token, the unique cryptic string assigned to this specific client. Then, the system must add this token to all API requests. A security token eliminates the need for passing the client credentials with API requests. For additional security, the token expires in two hours. After this time, all API requests with the expired token will fail and the system will need to request a new token from the platform.


**Creating an API client**

1. Log in to the management portal.
2. Click Settings > API clients > Create API client.
3. Enter a name for the API client.
4. Click Next.
   The API client is created with the Active status by default.
5. Copy and save the ID and secret value of the client and the data center URL. You will need them when enabling the OAuth 2.0 client credentials flow in a third-party system.

   **Important**
   For security reasons, the secret value is displayed only once. There is no way to retrieve this value if you lose it - only reset it.

6. Click Done.

**Resetting the secret value of an API client**

1. Log in to the management portal.
2. Click Settings > API clients.
3. Find the required client in the list.
4. Click ⬤, and then click **Reset secret**.

5. Confirm your decision by clicking **Next**.
   
   A new secret value will be generated. The client ID and data center URL will not change. All security tokens assigned to this client will become immediately expired and API requests with these tokens will fail.

6. Copy and save the new secret value of the client.

   **Important**
   
   For security reasons, the secret value is displayed only once. There is no way to retrieve this value if you lose it - only reset it.

7. Click **Done**.

### Disabling an API client

1. Log in to the management portal.
2. Click **Settings > API clients**.
3. Find the required client in the list.
4. Click ⬤, and then click **Disable**.
5. Confirm your decision.
   
   The status of the client will change to **Disabled**.
   
   API requests with security tokens that are assigned to this client will fail but the tokens will not become immediately expired. Disabling the client does not affect tokens' expiration time.
   
   It will be possible to re-enable the client at any time.

### Enabling a disabled API client

1. Log in to the management portal.
2. Click **Settings > API clients**.
3. Find the required client in the list.
4. Click ⬤, and then click **Enable**.
   
   The status of the client will change to **Active**.
   
   API requests with security tokens that are assigned to this client will succeed if these tokens have not expired yet.

### Deleting an API client

1. Log in to the management portal.
2. Click **Settings > API clients**.
3. Find the required client in the list.
4. Click ..., and then click **Delete**.

5. Confirm your decision.
   All security tokens assigned to this client will become immediately expired and API requests with these tokens will fail.

**Important**
There is no way to recover a deleted client.

**Integration references**

You can find documentation for any integration in our **Integration catalog**.

**To locate the required documentation**

2. Select the integration you need, and then click **Learn more**.

At the top of the page, you will find a link to guides or how-to articles.

Alternatively, you can find the documentation for the integrations that are developed by Acronis at https://www.acronis.com/en-us/support/documentation/, under **Integration References**.

The following table lists the implemented integrations with third parties and provides the links to the respective documentation.

<table>
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<tr>
<th>INTEGRATION NAME</th>
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<tbody>
<tr>
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Integration with VMware Cloud Director

A service provider can integrate VMware Cloud Director (formerly VMware vCloud Director) with Cyber Protect Cloud and provide its customers with out-of-the-box backup solution for their virtual machines.

The integration includes the following steps:

1. Configuring the RabbitMQ message broker for the VMware Cloud Director environment.
   RabbitMQ provides single sign-on (SSO) functionality, so that you can use your VMware Cloud Director credentials to log in to the Cyber Protect console.
   In Cyber Protect Cloud version 23.05 (released in May 2023) and older, RabbitMQ is also used for synchronizing the changes in the VMware Cloud Director environment to Cyber Protect Cloud.

2. Deploying a management agent.
   During the deployment of the management agent, a plug-in for VMware Cloud Director is also installed. The plug-in adds Cyber Protection to the VMware Cloud Director user interface.
   The management agent maps VMware Cloud Director Organizations to customer tenants in Cyber Protect Cloud, and Organization Administrators to customer tenant administrators. For more information about Organizations, see Creating an Organization in VMware Cloud Director in the VMware Knowledge Base.

## INTEGRATION NAME | View online | Open PDF
---|---|---
The customer tenants are created within the partner tenant for which the VMware Cloud Director integration is configured. These new customer tenants are in the **Locked** mode and cannot be managed by partner administrators within Cyber Protect Cloud.

**Note**

Only Organization Administrators with unique email addresses in VMware Cloud Director are mapped to Cyber Protect Cloud.

3. Deploying one or more backup agents.

The backup agent provides backup and recovery functionality for the virtual machines in the VMware Cloud Director environment.

To disable the integration between VMware Cloud Director and Cyber Protect Cloud, contact the technical support.

**Limitations**

- Integration with VMware Cloud Director is possible only for partner tenants in the **Managed by service provider** management mode, whose parent tenant (if any) also uses the **Managed by service provider** management mode. For more information about the types of tenants and their management mode, see "Creating a tenant" (p. 35).

All existing direct partners can configure integration with VMware Cloud Director. Partner administrators can enable this option also for sub-tenants by selecting the **Partner-owned VMware Cloud Director infrastructure** check box when creating a child partner tenant.

- Two-factor authentication must be disabled for the partner tenant in which the integration with VMware Cloud Director is configured.

- An administrator who has the Organization Administrator role in multiple VMware Cloud Director Organizations can manage the backup and recovery only for one customer tenant in Cyber Protection.

- Cyber Protect console opens in a new tab.

**Software requirements**

**Supported VMware Cloud Director versions**

- VMware Cloud Director 10.3, 10.4

**Supported web browsers**

- Google Chrome 29 or later
- Mozilla Firefox 23 or later
- Opera 16 or later
- Microsoft Edge 25 or later
- Safari 8 or later running in the macOS and iOS operating systems
In other web browsers (including Safari browsers running in other operating systems), the user interface might be displayed incorrectly or some functions may be unavailable.

Configuring RabbitMQ message broker

This procedure depends on the version of Cyber Protect Cloud. A simplified procedure is used for version 23.06 (released in June 2023) and later.

To configure RabbitMQ message broker

For version 23.06 and later

1. Install a RabbitMQ AMQP broker for your VMware Cloud Director environment.
   For more information on how to install RabbitMQ, see the VMware documentation: Install and Configure a RabbitMQ AMQP Broker.
2. Log in to the VMware Cloud Director provider portal as a system administrator.
3. Go to Administration > Extensibility, and then verify that under Non-blocking AMQP Notifications, Notifications are enabled.

For version 23.05 and older

1. Install a RabbitMQ AMQP broker for your VMware Cloud Director environment.
   For more information on how to install RabbitMQ, see the VMware documentation: Install and Configure a RabbitMQ AMQP Broker.
2. Log in to the VMware Cloud Director provider portal as a system administrator.
3. Go to Administration > Extensibility, and then verify that under Non-blocking AMQP Notifications, Notifications are enabled.
4. Log in to the RabbitMQ management console as an administrator.

5. On the **Exchanges** tab, verify that the exchange (by default, under the name **SystemExchange**) is created, and its type is **topic**.

![RabbitMQ Management Console](image)

**Installing and publishing the plug-in for VMware Cloud Director**

The plug-in for VMware Cloud Director is automatically installed when you install the management agent.

However, you need to manually publish the plug-in to the tenants that will use Cyber Protection.

*To publish the plug-in for VMware Cloud Director*

1. Log in to the VMware Cloud Director provider portal as a system administrator.
2. From the navigation menu, select **Customize Portal**.
3. On the **Plugins** tab, select the **Cyber Protection** plug-in, and then click **Publish**.
4. Configure the scope of the publishing:
   a. In the **Scope to** section, select only the **Tenants** check box.
   b. In the **Publish to** section, select **All tenants** to enable the plug-in for all existing and future tenants, or select individual tenants for which you want to enable the plug-in.
5. Click **Save**.
6. Click **Trust**.

**Installing a management agent**

1. Log in to the Cyber Protect Cloud management portal as a partner administrator.
2. Go to **Settings > Location**, and then click **Add VMware Cloud Director**.
3. From the **Release channel** drop-down list, select the version of the agent. The following options are available:
   - **Current** – this is the latest version.
   - **Stable** – this is the version from the previous release.
4. Click the **Management Agent** link and download the ZIP file.

5. Extract the management agent template file `vCDManagementAgent.ovf` and the virtual hard disk file `vCDManagementAgent-disk1.vmdk`.

6. In vSphere Client, deploy the management agent OVF template to an ESXi host under a vCenter instance that is managed by VMware Cloud Director.

**Important**
Install only one management agent per VMware Cloud Director environment.

7. In the **Deploy OVF Template** wizard, configure the management agent by setting the following:

   ![Deploy OVF Template](image)

   a. URL of the Cyber Protect Cloud data center. For example, https://us5-cloud.example.com.
   
   b. Partner administrator login and password.
   
   c. ID of the backup storage for virtual machines in the VMware Cloud Director environment. This backup storage can be partner-owned only. For more details on storages, refer to “Managing locations and storage” (p. 76).

   To check the ID, in the management portal, go to **Settings > Locations**, and then select the desired storage. You can see its ID after the `uuid=` part in the URL.

   d. Cyber Protect Cloud billing mode: **Per gigabyte** or **Per workload**.

   ![Note](image)

   The selected billing mode applies to all new customer tenants that will be created.

   e. VMware Cloud Director parameters: infrastructure address, system administrator login, and password.
   
   f. RabbitMQ parameters: administrator login and password.
   
   g. Network parameters: IP address, subnet mask, default gateway, DNS, DNS suffix.

   By default, only one network interface is enabled. To enable a second network interface, select the checkbox next to **Enable eth1**.

   ![Note](image)

   Ensure that your network settings allow the management agent to access both the VMware Cloud Director environment and your Cyber Protect Cloud data center.
You can also configure the management agent settings after the initial deployment. In vSphere Client, power off the virtual machine with the management agent, and then click **Configure > Settings > vApp Options**. Apply the desired settings, and then power on the virtual machine with the management agent.

8. [Optional] In vSphere Client, open the console of the virtual machine with the management agent, and then verify your setup.

9. Verify the RabbitMQ connection.
   
a. Log in to the RabbitMQ management console as an administrator.

   b. In the **Exchanges** tab, select the exchange that you set during the RabbitMQ installation. By default, its name is **systemExchange**.

![VCDManagementAgent_31059 - VMware Remote Console](image)
c. Verify the bindings to the `vcdmq` queue.

### Installing backup agents

1. Log in to the management portal as a partner administrator.
2. Go to **Settings > Location**, and then click **Add VMware Cloud Director**.
3. From the **Release channel** drop-down list, select the version of the agent. The following options are available:
   - **Current** – this is the latest version.
   - **Stable** – this is the version from the previous release.
4. Click the **Backup Agent** link and download the ZIP file.
5. Extract the backup agent template file `vCDCyberProtectAgent.ovf` and the virtual hard disk file `vCDCyberProtectAgent-disk1.vmdk`.
6. In vSphere Client, deploy the backup agent template to the desired ESXi host.
   
   You need at least one backup agent per host. By default, the backup agent is assigned 8 GB of RAM and 2 CPUs, and can process up to 5 backup or recovery tasks simultaneously.
   
   To process more tasks or to distribute the backup and recovery traffic, deploy additional agents to the same host. Alternatively, to avoid failures related to insufficient memory, we recommend that you assign 16 GB of RAM and 4 vCPUs to the existing agent.
Note
Backups of virtual machines on ESXi hosts where no backup agent is installed will fail with a "Task timeout expired" error.

7. In the **Deploy OVF Template** wizard, configure the backup agent by setting the following:

![Deploy OVF Template wizard](image)

a. **URL of the** Cyber Protect Cloud data center. For example, `https://us5-cloud.example.com`.

b. **Partner administrator login and password.**

   The agent will use these credentials to connect to the vCenter Server. We recommend that you use an account with the **Administrator** role assigned. Otherwise, provide an account with the necessary privileges on the vCenter Server.

c. **VMware vCenter parameters:** server address, login, and password.

   By default, only one network interface is enabled. To enable a second network interface, select the checkbox next to **Enable eth1**.

   **Note**
   Ensure that your network settings will allow the backup agent to access both the vCenter Server and your Cyber Protect Cloud data center.

d. **Network parameters:** IP address, subnet mask, default gateway, DNS, DNS suffix.

   By default, only one network interface is enabled. To enable a second network interface, select the checkbox next to **Enable eth1**.

e. **Download limit:** the maximum download speed rate (in Kbps), which defines the backup archive read speed during recovery operation. The default value is 0 - unlimited.

f. **Upload limit:** the maximum upload speed rate (in Kbps), which defines the backup archive write speed during backup operation. The default value is 0 - unlimited.

You can also configure the backup agent setting parameters after the initial deployment. In vSphere Client, power off the virtual machine with the backup agent, and then click **Configure > Settings > vApp Options**. Apply the desired settings, and then power on the virtual machine with the backup agent.

8. In vSphere Client, ensure that **Host** and **Storage vMotion** are disabled for the virtual machine with the backup agent.

**Updating the agents**

*To update a management agent*
1. Log in to the Cyber Protect Cloud management portal as a partner administrator.
2. Go to Settings > Location, and then click Add VMware Cloud Director.
3. Click the Management Agent link, and then download the ZIP file with the latest agent.
4. Extract the management agent template file vCDManagementAgent.ovf and the virtual hard disk file vCDManagementAgent-disk1.vmdk.
5. In vSphere Client, power off the virtual machine with the current management agent.
6. Deploy a virtual machine with the new management agent by using the latest vCDManagementAgent.ovf and vCDManagementAgent-disk1.vmdk files.
7. Configure the management agent by using the same settings as in the old one.
8. [Optional] Delete the virtual machine with the old management agent.

**Important**
You must have only one active management agent per VMware Cloud Director environment.

**To update a backup agent**

1. Log in to the Cyber Protect Cloud management portal as a partner administrator.
2. Go to Settings > Location, and then click Add VMware Cloud Director.
3. Click the Backup Agent link and download the ZIP file with the latest agent.
4. Extract the management agent template file vCDCyberProtectAgent.ovf and the virtual hard disk file vCDCyberProtectAgent-disk1.vmdk.
5. In vSphere Client, power off the virtual machine with the current backup agent.
   All backup and recovery tasks that might be currently running will fail. To check whether any tasks are running, in vSphere Client, open the console of the virtual machine with the backup agent, and then run the command `ps | grep esx_worker`. Ensure that there are no active `esx_worker` processes.
6. Deploy a virtual machine with the new backup agent by using the latest vCDCyberProtectAgent.ovf and vCDCyberProtectAgent-disk1.vmdk files.
7. Configure the backup agent by using the same settings as in the old one.
8. [Optional] Delete the virtual machine with the old backup agent.

**Accessing the Cyber Protect console**

The following administrators can manage the backup of virtual machines in VMware Cloud Director Organizations:

- Organization Administrators
- Specifically assigned backup administrators
  For more information on how to create such an administrator, refer to "Creating a backup administrator" (p. 285).

Administrators can access the custom Cyber Protect console by clicking **Cyber Protection** in the navigation menu of the VMware Cloud Director tenant portal.
Note
The single sign-on is available only for Organization Administrators and is not supported for System Administrators who use the VMware Cloud Director tenant portal.

In the Cyber Protect console, administrators can access only their own VMware Cloud Director Organization elements: virtual data centers, vApps, and individual virtual machines. They can manage the backup and recovery of the VMware Cloud Director Organization resources.

Partner administrators can access the Cyber Protect consoles of their customer tenants and can manage backup and recovery on their behalf.

Limitations
The list of limitations is subject to change in the upcoming releases of Cyber Protect Cloud.

Backup
- Only backup of the entire machine is supported. File filters, or selecting disks or volumes, are not available.
- Only cloud storage is supported as a backup location. The storage is configured in the management agent settings and users cannot change it in the protection plan.
- Dynamic groups are not supported.
- The following backup schemes are supported: Always incremental (single file), Always full, and Weekly full, Daily incremental.
- Cleanup only after backup is supported.

Recovery
- Recovery only to the original virtual machine is supported. The original virtual machine must exist in the VMware Cloud Director environment.
- File-level recovery is not supported.

Creating a backup administrator
Organization Administrators can delegate the backup management to specifically assigned backup administrators.

To create a backup administrator
1. In the VMware Cloud Director tenant portal, click Administration > Roles > New.
2. In the Add Role window, specify a name and description for the new role.
3. Scroll down the list of permissions, and then, under Other, select Self-service VM backup operator.
Note
The **Self-service VM backup operator** permission becomes available after you install the plug-in for VMware Cloud Director. For more information on how to do this, refer to "Installing and publishing the plug-in for VMware Cloud Director" (p. 279).

4. In the VMware Cloud Director tenant portal, click **Users**.
5. Select a user, and then click **Edit**.
6. Assign this user the new role that you created.

As a result, the selected user will be able to manage the backups for the virtual machines in this Organization.

Note
System Administrators of the VMware Cloud Director environment can define a global role with the **Self-service VM backup operator** permission enabled, and then publish this role to the tenants. Thus, the Organization Administrators will only need to assign the role to a user.

### System report, log files, and configuration files

For troubleshooting purposes, you might need to create a system report by using the `sysinfo` tool, or to check the log and configuration files on a virtual machine with an agent.

You can access the virtual machine either directly, by opening its console in vSphere Client, or remotely – via an SSH client. To access the virtual machine via an SSH client, first you have to enable the SSH connection to this machine.

**To enable the SSH connection to a virtual machine**

1. In vSphere Client, open the console of the virtual machine with the agent.
2. At the command prompt, run the following command: `/bin/sshd` to start the SSH daemon.

As a result, you can connect to this virtual machine by using an SSH client, such as WinSCP, for example.

**To run the `sysinfo` tool**

1. Access the virtual machine with the agent.
   - To access it directly, in vSphere Client, open the console of the virtual machine.
   - To access it remotely, connect to the virtual machine via an SSH client.
     - Use the following default login:password combination: `root:root`.
2. Navigate to the `/bin` directory, and then run the `sysinfo` tool.

   ```
   # cd /bin/
   # ./sysinfo
   ```

As a result, a system report file will be saved to the default directory: `/var/lib/Acronis/sysinfo`. You can specify another directory by running the `sysinfo` tool with the `--target_dir` option.
3. Download the generated system report by using an SSH client.

**To access a log or configuration file**

1. Connect to the virtual machine via an SSHclient.
   Use the following default login:password combination: root:root.
2. Download the desired file.
   You can find the log files in the following locations:
   - Backup agent: \opt\acronis\var\log\vmware-cloud-director-backup-service\log.log
   - Management agent: \opt\acronis\var\log\vmware-cloud-director-management-agent\log.log
   You can find the configuration files in the following locations:
   - Backup agent: \opt\acronis\etc\vmware-cloud-director-backup-service\config.yml
   - Management agent: \opt\acronis\etc\vmware-cloud-director-management-agent\config.yaml

**Removing the integration with VMware Cloud Director**

Reverting the configuration and unregistering the VMware Cloud Director instance from Cyber Protect Cloud is a complex procedure. Please contact your support representative for help.
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