

Acronis

Acronis Data Services Cloud Autotask PSA Integration

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1. Introduction

This document describes how to integrate Acronis Data Services Cloud with Autotask Professional Service Automation (PSA).

The integration allows the following:

1. Provisioning of the backup service to new and existing Autotask accounts from the Autotask user interface.
2. Automatic creation of tickets for backup, recovery, or quota-related issues in Autotask.

2. Account activation

Before setting up the integration, please obtain an Acronis Data Services Cloud account directly from Acronis or from a partner sales representative. To obtain an account from Acronis, go to <http://www.acronis.com/en-us/provider/backup-cloud/> and click **Request a quote**.

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

1. An account activation link. Click the link and set the password for your account. Remember the login that is shown on the account activation page.
2. A link to the login page. By using this link, you can access the backup console directly from a web browser. The login and password are the same as in the previous step.

3. Autotask initial settings

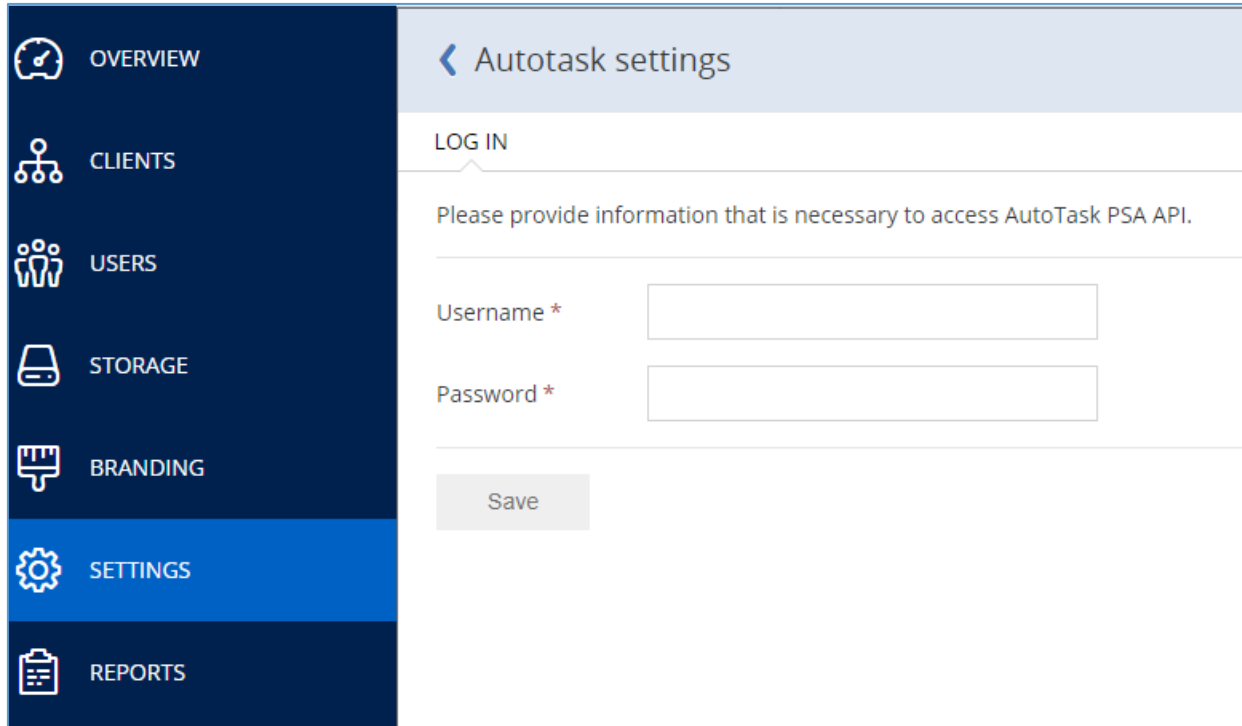
Before setting up the integration, do the following:

1. Go to the Autotask user interface.
2. Navigate to **Admin > Features & Settings > Products & Services**, and then select **Services**.
3. Add new services for the following Acronis Data Services Cloud offerings:
 - a. Physical workstations
 - b. Physical servers
 - c. Virtual machines
 - d. Mobile devices
 - e. Office 365 mailboxes
 - f. Websites
 - g. Local backup
 - h. Cloud storage
4. [Optional] Select **Service Bundles**, and create service bundles.

4. Integration setup

To integrate Acronis Data Services Cloud with Autotask:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration > Autotask**.
3. On the **Log in** tab, provide your Autotask user name and password, and then click **Save**.



OVERVIEW

CLIENTS

USERS

STORAGE

BRANDING

SETTINGS

REPORTS

< Autotask settings

LOG IN

Please provide information that is necessary to access AutoTask PSA API.

Username *

Password *

Save

5. Billing and provisioning settings

To configure the billing and provisioning settings:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration > Autotask settings > Billing and provisioning.**
3. Select the **Enable** check box.
4. Select the corresponding Autotask service for each of the Acronis offerings.

If the service is not selected, the corresponding Acronis offering will be set depending on the **Free provisioning** option. If **Free provisioning** is disabled, the offering will be set to zero. If **Free provisioning** is enabled, the offering will be set to unlimited.

If the service is not included in a contract, the corresponding Acronis offering will be set in the same way as above.

If no services linked to cloud storages are included in a contract, the default storage will be assigned to the customer group during provisioning. If you have several storages, you can choose which one is considered default.

5. [Optional] Configure the **Group Provisioning** and **Group Deprovisioning** settings in the corresponding sections.
6. Click **Apply**.

The synchronization between Acronis Data Services Cloud and Autotask may take up to 15 minutes.

OVERVIEW

CLIENTS

USERS

STORAGE

BRANDING

SETTINGS

REPORTS

Acronis
Data Services Cloud
Powered by Acronis AnyData Engine

Autotask settings

[LOG IN](#) | [BILLING AND PROVISIONING](#) | [GROUP MAPPING](#) | [TICKET SYNCHRONIZATION](#)

Enable this page and set up the values if you want the service usage statistics to be available in AutoTask PSA. You can also instruct the service to automatically set usage quotas and groups for accounts.

Enable

SERVICE MAPPING

Select the corresponding AutoTask service for each of the Acronis offerings.

ACRONIS BACKUP CLOUD	AUTOTASK SERVICES	DEFAULT STORAGE	FREE PROVISIONING
Local backup	LocalBackup x		<input checked="" type="checkbox"/>
Mobile devices	Select option		<input type="checkbox"/>
Office 365 mailboxes	Select option		<input type="checkbox"/>
Physical servers	Acronis:Backup Cloud:SRV x		<input type="checkbox"/>
Physical workstations	Acronis:Cloud:Wks:Backup x		<input checked="" type="checkbox"/>
Virtual machines	Select option		<input type="checkbox"/>
Websites	Select option		<input type="checkbox"/>
Cloud Storage (fes-baas.acronis.com)	DefaultCloudStorage x	⊙	<input type="checkbox"/>

GROUP PROVISIONING

These settings will be used for creating accounts and groups in Acronis Backup Cloud.

Create accounts based on: Account name v

How to set account password: Define manually v

Automatically create groups in Acronis Backup Cloud for companies with assigned Acronis quotas

GROUP DEPROVISIONING

Set quotas to zero if an account does not have active services

[Apply](#)

6. Group mapping

To manually map an Autotask account to an Acronis Data Services Cloud customer group:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration > Autotask settings > Group mapping**.
3. Select the Autotask account.
4. Click **Map to existing group** on the right panel.
5. Select the customer group, and then click **Map**.
6. Click **Apply**.

To manually provision Acronis Data Services Cloud customer groups for Autotask accounts:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration > Autotask settings > Group mapping**.
3. Select one or more Autotask accounts.
4. Click **Provision new group** on the right panel.
5. Click **Apply**.

To remove mapping, select the already mapped Autotask account, click **Remove mapping** on the right panel, and then click **Apply**.

The synchronization between Acronis Data Services Cloud and Autotask may take up to 15 minutes.

The screenshot shows the 'Autotask settings' page in the Acronis Data Services Cloud management portal. The page is titled 'Autotask settings' and has a navigation menu on the left with options: OVERVIEW, CLIENTS, USERS, STORAGE, BRANDING, SETTINGS (selected), and REPORTS. The main content area shows a table of Autotask accounts and their corresponding Acronis Backup Cloud groups. The table has columns for 'AUTOTASK ACCOUNT', 'TYPE', and 'ACRONIS GROUP'. The 'ACRONIS GROUP' column shows 'Not mapped' for three accounts and 'Blue Sky Group' for one. On the right side, there are two buttons: 'Map to existing group' and 'Provision new group'.

AUTOTASK ACCOUNT	TYPE	ACRONIS GROUP
ABLE Manufacturing HQ*	Customer	Not mapped
<input checked="" type="checkbox"/> ABLE Manufacturing West Coast	Customer	Not mapped
Blue Sky Group	Customer	Blue Sky Group
Department of Public Works	Customer	Not mapped

7. Ticket synchronization settings

To enable automatic creation of Autotask tickets for Acronis Data Services Cloud alerts:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration > Autotask settings > Ticket synchronization**.
3. Select the **Enable** check box.
4. In **Source**, select the source for all tickets that will be created based on Acronis alerts.
5. Set the **Note Type** and **Note Publish** values for all tickets that will be created based on Acronis alerts.
6. Configure the parameters for each of the Acronis alerts.
7. Click **Apply**.

Autotask settings

LOG IN BILLING AND PROVISIONING GROUP MAPPING TICKET SYNCHRONIZATION

Map Acronis Backup Cloud alerts to Autotask PSA tickets.

Enable

Create new ticket for an alert if the initial ticket is closed for the following number of days: 1

Source: Monitoring Alert Note Type: Task Summary Note Publish: All Autotask Users

ACRONIS Alerts	AUTOTASK Queue	Type	Status	Priority	Due Date (Days)
<input checked="" type="checkbox"/> Machine is offline for more than 30 days	Client Portal	Service Request	New	Critical	3
<input checked="" type="checkbox"/> Backup failed	Monitoring Alert	Alert	Waiting Approval	High	5
<input checked="" type="checkbox"/> Quota exceeded	Client Portal	Service Request	New	Critical	3
<input checked="" type="checkbox"/> Quota reached	Client Portal	Service Request	New	Critical	3
<input checked="" type="checkbox"/> Backup is corrupted	Client Portal	Service Request	New	Critical	3
<input checked="" type="checkbox"/> Subscription license has expired	Client Portal	Service Request	New	Critical	3

Apply

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8. Integration summary

To view the integration summary:

1. Log in to the Acronis Data Services Cloud management portal.
2. Click **Settings > Integration**.

The information about the integration status will appear.

The screenshot displays the Acronis Data Services Cloud management portal interface. On the left is a dark blue navigation sidebar with menu items: OVERVIEW, CLIENTS, USERS, STORAGE, BRANDING, SETTINGS (highlighted in blue), and REPORTS. Below the sidebar is the Acronis Data Services Cloud logo and the text "Powered by Acronis AnyData Engine".

The main content area is titled "Integration" and features a "Security" shield icon. The primary focus is the "Autotask integration status" section, which includes the Autotask logo and a table of metrics:

STATUS	ACCOUNTS	TICKETS
OK	Total: 88 Linked: 39	New: 3

Below this is the "Available integrations" section, which lists several integration options in a grid:

- ConnectWise Manage
- Odin
- HostBill
- APS Cloud Application Stan...
- Flexiant Cloud Orchestrator
- Windows Azure Pack
- WHMCS
- RESTful API
- ConnectWise Automate

9. Creating contracts for the backup service

To create a contract for the backup service:

1. Open the Autotask user interface.
2. Go to **New > Recurring Service**.
3. Set **Contract Name**, **Account Name**, **Start Date** and **End Date**. Set other contract parameters if required. Click **Next**.
4. Add services and/or service bundles with the Acronis services. Set the number of units for each bundle or service.
5. Finish the wizard.

If the account is not mapped to an Acronis Data Services Cloud group and auto-provisioning is enabled on the **Billing and Provisioning** tab, a new group will be created for the account.

If the account is not mapped to an Acronis Data Services Cloud group and auto-provisioning is disabled, map the account manually on the **Group Mapping** tab.

If the account is already mapped to an Acronis Data Services Cloud group, the quotas for the group will be updated.

The synchronization between Acronis Data Services Cloud and Autotask may take up to 15 minutes.

10. Alerts and tickets

To view the tickets that originate from Acronis Data Services Cloud:

1. Open the Autotask user interface.
2. Go to **Dashboard > Service Manager**.