

# Acronis

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# Acronis Cyber Cloud

## Integration with Autotask PSA

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# 1 Introduction

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

The integration allows you to do the following:

- Provisioning of the Acronis Cyber Cloud services to new and existing Autotask accounts by using the Autotask console.
- Automatic billing of customers on a prepaid basis in the Autotask console.
- Automatic creation of tickets for backup, recovery, or quota-related issues in Autotask.

## 2 Prerequisites

You must have active accounts in Acronis Cyber Cloud and Autotask.

## 3 Setting up integration

*To set up integration between Acronis Cyber Cloud and Autotask*

1. [Configure Autotask](#) .
2. [Set up integration by specifying login data on the Acronis Cyber Cloud site](#).

### 3.1 Configuring Autotask

Features are available as part of either Standard or Advanced Protection packs. Advanced Protection extends the Standard version with further protection capabilities that can be added only on top of it and are charged additionally. Advanced Protection can be assigned only to a workload that already has Standard Protection assigned.

***Before setting up integration, do the following***

1. Log in to the Autotask console.
2. Go to **Admin > Features & Settings > Products & Services**, and then select **Services**.
3. Add new services for the following offering items available as workloads in the Standard Protection pack of Acronis Cyber Cloud:
  - Workstations
  - Servers
  - Virtual machines
  - Web hosting servers
  - Microsoft 365 seats
    - Microsoft 365 Mailboxes
    - Microsoft OneDrive
  - Microsoft 365 seats (unlimited Acronis Hosted cloud storage included)
  - Mailboxes
  - OneDrive
  - Microsoft Hosted Exchange
  - Google Workspace seats
  - Google Workspace seats (unlimited Acronis Hosted cloud storage included)
  - G Suite seats
    - Gmail (incl. Calendar, Contacts)
    - Google Drive
  - Google Workspace Team Drive
  - Mobile devices
  - Websites

Advanced packs support multiple offering items.

You can edit the auto-mapped service names either by creating new ones or by selecting from a list of already existing names. When you define a new service name, it will be automatically

created on the Autotask side.

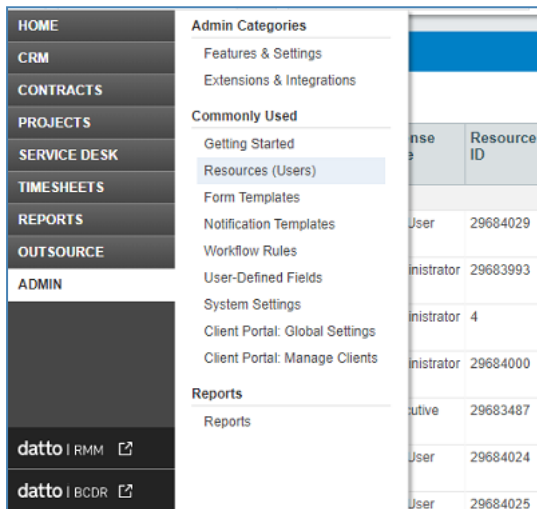
4. [Optional] Select **Service Bundles**, and create service bundles.

## 3.2 Setting up integration with Autotask

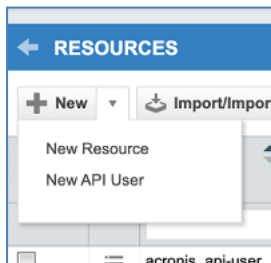
Acronis uses Autotask API credentials for authentication.

To create your Autotask API user:

1. Log in to Autotask.
2. Navigate to the **Admin** section, then go to the **Resources (Users)** page.



3. Select **New API User** from the **New** button drop-down menu.



4. The **Add API User** window will open next. Populate the **First Name**, **Last Name** and **Email**

**Address** contact fields with the necessary user details.

The screenshot shows the 'ADD API USER' form. At the top, there are 'Save & Close' and 'Cancel' buttons. The form is organized into three main sections:

- GENERAL (Top):** Includes fields for 'First Name', 'Last Name', and 'Email Address'. It also has a 'Security Level' dropdown menu, 'Date Format' (set to MM/dd/yyyy), 'Time Format' (set to hh:mm tt), and 'Number Format' (set to X,XXX.XX). There are checkboxes for 'Active' (checked) and 'Locked'.
- GENERAL (Middle):** Contains 'Generate Key' and 'Generate Secret' buttons. Below them are fields for 'Username (Key)' and 'Password (Secret)'.
- API TRACKING IDENTIFIER (Bottom):** Starts with a note: 'API version 1.6 & later require the user of an API tracking identifier. Once assigned, this cannot be changed.' It has radio buttons for 'Integration Vendor' (selected), 'Custom (Internal Integration)', and 'None'. Below is a dropdown menu for 'Integration Vendor'.

5. Select **API User (system)** from the **Security Level** drop-down menu.
6. In the **General** section, click on **Generate Key** and **Generate Secret**.
7. Select **Integration Vendor** in the **API Tracking Identifier** section. Then from the drop-down menu, choose **Acronis - Acronis Cyber Cloud**.
8. Click **Save** and **Close**.

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### Note

Autotask API users can be assigned to one or more Lines of Business. This is done in order to control their access to contracts, belonging to a specific Line of Business unit. We recommend not assigning Lines of Business to API users, created for the Acronis integration. This will guarantee that the Autotask API user has access to all contracts and prevent the occurrence of mapping issues.

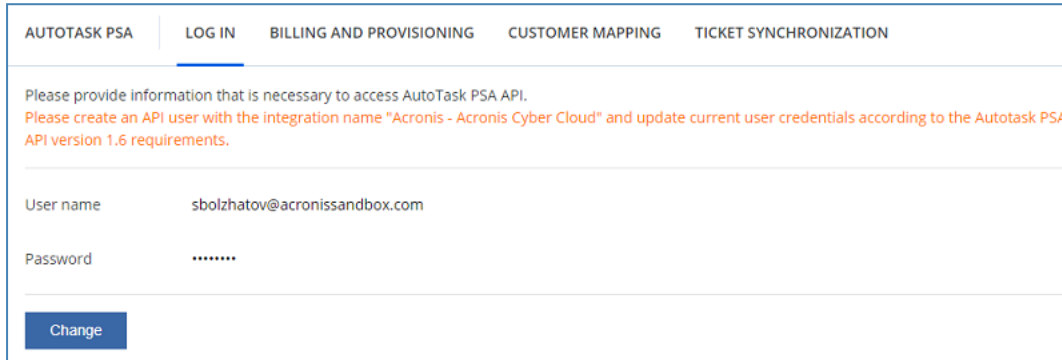
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For more information on how to create an API user, refer to the [Autotask documentation](#).

## Upgrading integration credentials

If you have the integration set up with a regular Autotask user instead of an API user, you will see the following error message, displayed on the **Integrations** page in your Acronis account:

*"Please create an API user with the integration name "Acronis - Acronis Cyber Cloud" and update current user credentials, according to the Autotask PSA API version 1.6 requirements."*



The screenshot shows a web interface with a navigation bar at the top containing the following items: AUTOTASK PSA, LOG IN, BILLING AND PROVISIONING, CUSTOMER MAPPING, and TICKET SYNCHRONIZATION. Below the navigation bar, there is a message: "Please provide information that is necessary to access AutoTask PSA API. Please create an API user with the integration name "Acronis - Acronis Cyber Cloud" and update current user credentials according to the Autotask PSA API version 1.6 requirements." Below this message is a form with two input fields: "User name" with the value "sbozhatov@acronissandbox.com" and "Password" with a masked value "\*\*\*\*\*". At the bottom of the form is a blue button labeled "Change".

Follow these instructions to upgrade your Autotask user to an API user:

<https://kb.acronis.com/content/64074>



## 4 Integration scenarios

### 4.1 Provisioning (automatic or manual)

**Automatic provisioning** means that when you create a customer in Autotask, a corresponding tenant will be automatically created in Acronis Cyber Cloud and Acronis services will be provisioned for it.

**Manual provisioning** means that a corresponding tenant will not be automatically created in Acronis Cyber Cloud. You may need manual provisioning when you already have customer accounts in Autotask and Acronis Cyber Cloud, and you want to map them manually.

#### *To set up provisioning*

1. [Configure product mapping.](#)
2. [Create a contract.](#)
3. Depending on the type of provisioning:
  - Automatic: [configure the provisioning settings.](#)
  - Manual: [configure the customer mapping.](#)

### 4.2 Billing (Prepaid or Pay-as-you-go)

**Prepaid billing** implies setting quotas to Acronis Cyber Cloud offering items based on the values defined in contracts in Autotask.

**Pay-as-you-go (PAYG) billing** means charging a customer for the actual resource usage at a defined rate. If the PAYG billing is defined, resource usage is synchronized between the Acronis Cyber Cloud and Autotask at regular intervals.

The integration creates a new **Acronis PAYG** user-defined field for the Autotask contracts, used to determine whether the contract is of PAYG or Prepaid type. You will be prompted to set this field when creating new contracts. By default, Prepaid billing type is used.

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#### **Note**

Contracts cannot have both PAYG and Prepaid additions.

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#### *To set up billing*

1. [Configure the product mapping.](#)
2. [Create a contract.](#)
3. [Configure the customer mapping.](#)

### 4.3 Ticket synchronization

**Ticket synchronization** translates Acronis Cyber Cloud alerts into Autotask tickets. You can configure creating and auto-closing rules, as well as assign the priority, status, and other parameters

of tickets.

***To set up automatic ticket synchronization***

1. Configure alert mapping.
2. Configure customer mapping.

# 5 Configuring integration

## 5.1 Configuring the product mapping

### *To configure product mapping*

1. Open the **Billing and provisioning** tab.
2. Select the **Enable** check box.
3. For each Cyber Cloud service, you can set up mapping between data sources and Autotask services.
4. Set the following service properties:
  - a. **name** - use one of the below options:
    - the auto-generated name
    - create a new name
    - select any of the existing Autotask names
  - b. **Period type** - select from a list of available values: **Monthly, Quarterly, Semi-Annual** or **Yearly**
  - c. **Service code** - this field uses dynamic values
5. Click **Apply**.

For more details, refer to the [Acronis Cyber Cloud Partner's Guide](#).

If a service is not selected, the offering item quota will be set depending on the **Provisioning** option. If the **Free** option is not selected, the quota will be set to zero. If the **Free** option is selected, the quota will be set to unlimited.

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

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

## 5.2 Creating a contract

### *To create a contract*

1. Log in to the Autotask console.
2. Go to **New > Recurring Service**.
3. Set **Contract Name, Account Name, Start Date, End Date**, and any other contract parameters.
4. Click **Next** to go to the **User-Defined Fields** tab and set the **Acronis PAYG** option to either Yes or No, depending on the type of billing you want this contract to have.

The screenshot shows a blue header bar with the text "CONTRACT WIZARD (RECURRING SERVICE)". Below the header is a white box with the title "USER-DEFINED FIELDS". Underneath, the text "Acronis PAYG" is displayed above a dropdown menu. The dropdown menu is currently open and shows the option "Yes" with a small downward arrow on the right side.

It is also possible to edit this setting for an already created contract.

5. Click **Next**.
6. Add services and/or service bundles with the Acronis Cyber Cloud services. Set the number of units for each bundle or service.
7. Complete the wizard steps.

If the account is not mapped to a customer within Acronis Cyber Cloud and auto-provisioning is enabled on the **Billing and provisioning** tab, a new customer will be created for this account.

If the account is not mapped to a customer within Acronis Cyber Cloud and auto-provisioning is disabled, map this account manually on the **Customer mapping** tab.

If the account is already mapped to a customer within Acronis Cyber Cloud, the quotas for this customer will be updated or the usage - reported into this contract, depending on the PAYG setting.

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

## 5.3 Configuring the provisioning settings

### *To configure the provisioning settings*

1. Go to the **Billing and provisioning** tab. Scroll down and find the **Customer Provisioning** section.
2. To configure the customer provisioning and deprovisioning, change the settings in the corresponding sections.

For automatic tenant creation, enable the **Automatically create customers for Autotask accounts with assigned offering items** option.

For manual tenant creation, disable the **Automatically create customers for Autotask accounts with assigned offering items** option.

To enable the two-factor authentication for all new customers, select the corresponding check box. When enabled, customers are provisioned with enabled two-factor authentication and all their users have it enabled.

AUTOTASK PSA
LOG IN
BILLING AND PROVISIONING
CUSTOMER MAPPING
TICKET SYNCHRONIZATION

### Customer Provisioning

These settings will be used for creating customers and accounts.

Create accounts based on Account primary contact ▼

How to set account password Send activation email ▼

Automatically create customers for Autotask accounts with assigned offering items

Enable two-factor authentication

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### Customer Deprovisioning

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

Disable customer if an account does not have active services for the following number of days: 30

Delete customer if an account does not have active services for the following number of days: 45

Apply

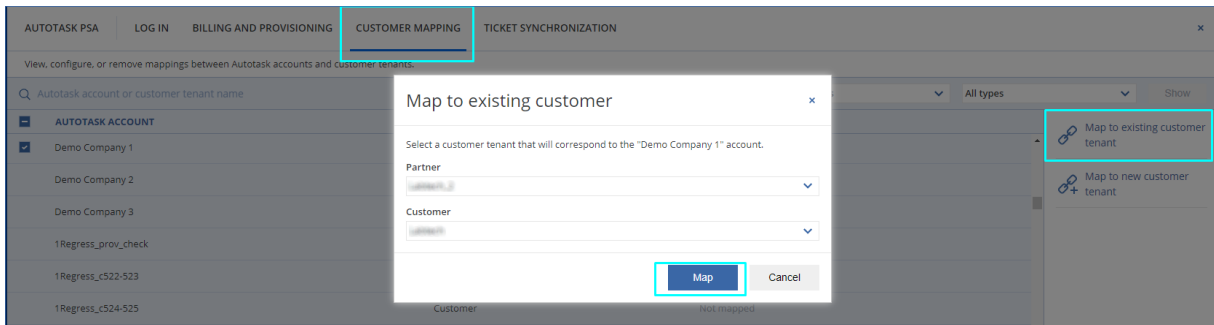
The synchronization between Acronis Cyber Cloud and Autotask may take up to 15 minutes.

See also [Setting up two-factor authentication](#).

## 5.4 Configuring the customer mapping

### ***To map an Autotask account to an existing customer within Acronis Cyber Cloud***

1. Switch to the **Customer mapping** tab.
2. Select an Autotask account. To filter the list of accounts shown, use the **Search** bar or the two drop-down menus. The **accounts** menu lets you show only mapped, unmapped or all available accounts. The **types** drop-down menu allows filtering for a specific account type.
3. Click **Map to existing customer tenant** on the right panel.
4. Select a partner, and then select a customer within this partner.
5. Click **Map**, and then click **Apply**.

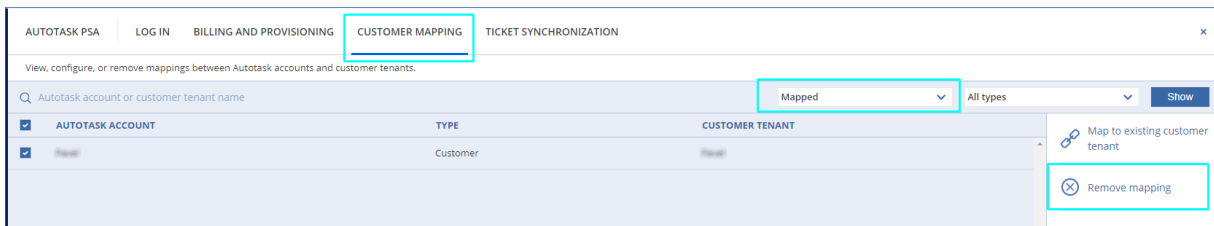


### **To map an Autotask account to a new customer within Acronis Cyber Cloud**

1. On the **Customer mapping** tab, select an Autotask account that has the **Not mapped** value in the **Customer tenant** column.
2. Click **Map to new customer tenant** on the right panel, and then click **Apply**.

### **To remove the customer mapping**

1. Select a mapped Autotask account.
2. Click **Remove mapping** on the right panel.
3. Confirm the removal by clicking **Remove**, and then click **Apply**.



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

## 5.5 Configuring the alert mapping

### **To configure the alert mapping**

1. Switch to the **Ticket synchronization** tab.
2. Select the **Enable** check box.
3. In **Source**, select the source for all tickets that will be created based on customer alerts.
4. Set the **Note Type** and **Note Publish** values for all tickets that will be created based on customer alerts.
5. Configure the parameters for each of the customer alerts.
6. [Optional] If you want to create a new ticket for a mapped alert every time the initial ticket for this alert has been closed for a specific number of days, select the **Create new ticket for an alert if the initial ticket is closed for the following number of days** check box, and then specify the number of days. Otherwise, the initial ticket will be re-opened on every occurrence of the alert.

- [Optional] If you want to automatically close tickets that originated from alerts when issues that generated these alerts are resolved, select the **Enable auto-closing of tickets with status** check box, and then select the status that will be assigned to a closed ticket in Autotask.
- Click **Apply**.

Map customer alerts to Autotask PSA tickets.

Enable

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

Enable auto-closing of tickets with status:

Source:  Note Type:  Note Publish:

CUSTOMER Alerts	AUTOTASK Queue	Type	Status	Priority	Issue type	Sub-issue type	Due date (days)
<input checked="" type="checkbox"/> Active Protection service is not running	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="Select..."/>	<input type="text" value="Select issue type"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Agent is outdated	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="Select..."/>	<input type="text" value="Select issue type"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Backup failed	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="Select..."/>	<input type="text" value="Select issue type"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Backup is corrupted	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="Select..."/>	<input type="text" value="Select issue type"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Backup is missing	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="Select..."/>	<input type="text" value="Select issue type"/>	<input type="text" value="3"/>

## 5.6 Viewing tickets that originated from customer alerts

### *To view tickets that originated from customer alerts*

- Open the Autotask console.
- Go to **Dashboard > Service Manager**.

You can check the specific contract under which the ticket was generated. The contract name is included in the ticket, on the condition that:

- The Autotask account is mapped to a customer within Acronis Cyber Cloud
- Billing and provisioning is enabled and Cyber Protection services are mapped
- Ticket synchronization is enabled

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