

# HaloPSA Integration

C25.03

Configuration Guide

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# Introduction

This guide describes how to activate and configure the integration of Acronis Cyber Cloud with HaloPSA.

If the integration is fully enabled, it can:

## **Customers**

- Map HaloPSA customers to Acronis customer tenants.
- Provision and deprovision Acronis customer tenants.

## **Products**

- Map HaloPSA recurring items to Acronis offering items.
- Provision and deprovision Acronis offering items, based on HaloPSA recurring invoices.
- Configure Acronis offering items, based on additional charges configuration of HaloPSA recurring invoices.

Supported modes:

- Prepaid
- Pay-as-you-go
- Prepaid with overage
- Report Acronis offering item usage to HaloPSA recurring invoices.

## **Tickets**

- Create HaloPSA tickets when Acronis alerts occur.
- Resolve and reopen HaloPSA tickets, based on Acronis alerts.
- Clear Acronis alerts, based on HaloPSA ticket status.

# Prerequisites

## *HaloPSA prerequisites*

- HaloPSA 2.98.6 or higher.
- A configured HaloPSA instance.
- An account in HaloPSA.
- HaloPSA API credentials.

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### **Note**

For more information, see [Obtaining HaloPSA API credentials](#).

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- [To use ticket mapping functionality] HaloPSA ticket settings.

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### **Note**

For more information, see [HaloPSA ticket type prerequisites](#).

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- [To use ticket mapping functionality] At least one HaloPSA ticket type.

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### **Note**

This integration is built upon the assumption that in HaloPSA, you have an active recurring invoice with the customer, and that the recurring invoice will have the Acronis services sold as additional charges, representing the mapped recurring items.

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## *Acronis prerequisites*

- You must have a fully configured Acronis Cyber Cloud partner tenant account.
- The user account that you use to activate and configure the integration must be a Company Administrator.
- You must not have disabled support access.

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### **Note**

For more information, see [the Management Portal Partner Administrator guide](#).

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- [Optional] One or more customer tenants.

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**Note**

Only customer tenants that are provisioned as **Managed by service provider** will appear as active for mapping.

**Management mode** ⓘ

☒ **Managed by service provider**

- ✓ Manage protection for the customer
- ✓ Access backups and other resources

☐ **Managed by customer**

- ✗ Manage protection for the customer
- ✗ Access backups and other resources

- [Optional] One or more protection plans.

## Obtaining HaloPSA API credentials

The integration uses the HaloPSA API to set up and synchronize integration data (accounts, recurring items, recurring invoices, offering item quota, usage, and overage). This topic describes how to obtain HaloPSA API credentials.

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**Note**

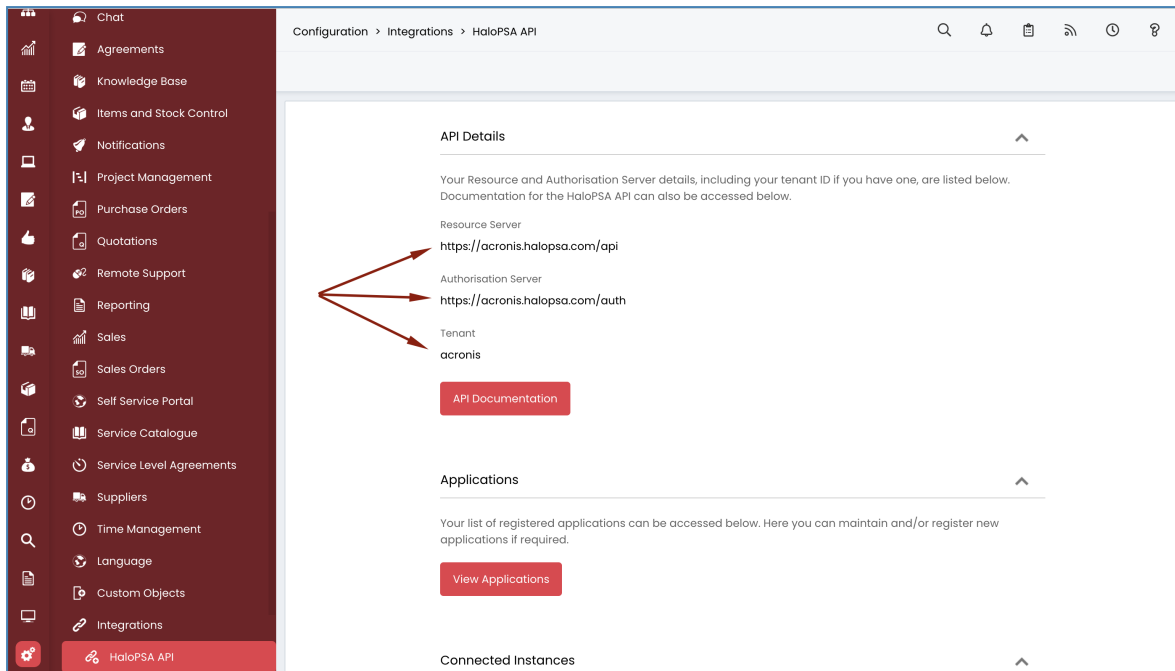
This topic is included for your convenience. The content of this topic is accurate as of February 2025. However, this is a HaloPSA process, and the steps or the UI can change without informing Acronis.

For the official instructions, see [the HaloPSA guides](#).

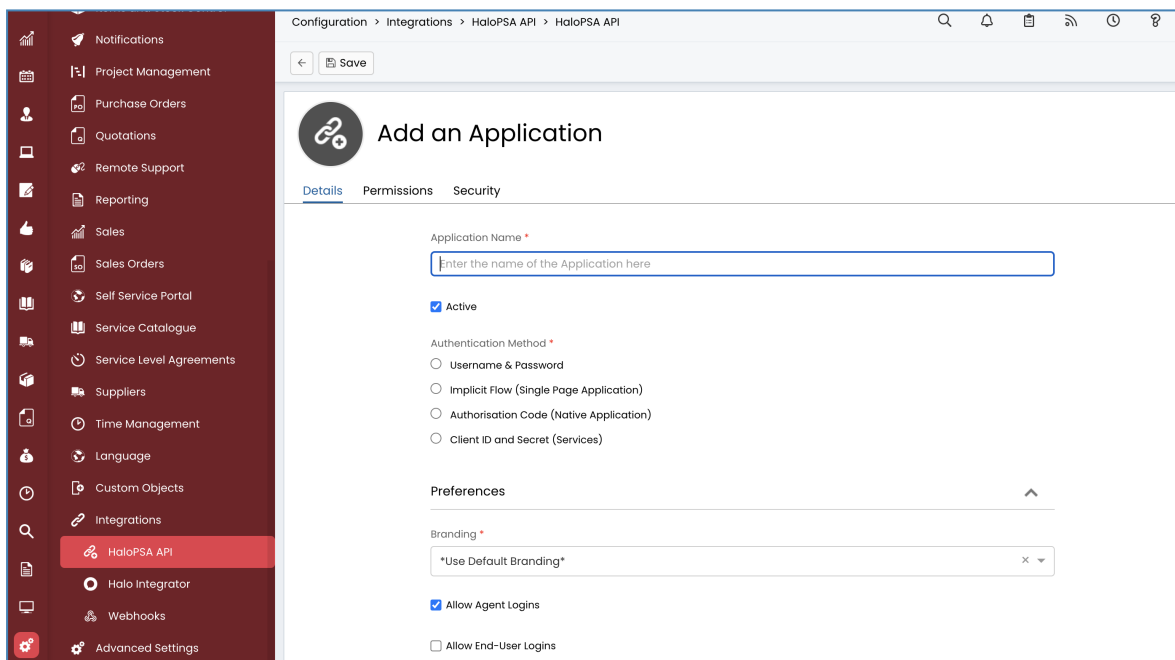
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***To obtain HaloPSA API credentials***

1. Log in to your HaloPSA instance.
2. Navigate to **Configuration > Integrations > HaloPSA API**.
3. Note down the values of **Resource Server**, **Authorization Server** and **Tenant**.



4. In the **Applications** section, click **View Applications**.
5. Click **New**.



6. Enter an **Application Name**.  
We recommended **Client Portal**.
7. Make sure that the **Active** checkbox is selected.
8. Select **Client ID and Secret (Services)** as the **Authorization Method**.
9. Select **Agent** in the **Login Type** dropdown list.

---

**Important**

Select an **Agent** first, as it will change your **Client secret**.

---

10. Select a system admin within your HaloPSA instance from the **Agent to log in as** dropdown list.
11. Navigate to the **Permissions** tab at the top.
12. Select all of these permissions:
  - **read:tickets**
  - **edit:tickets**
  - **read:customers**
  - **edit:customers**
  - **read:items**
  - **edit:items**
  - **read:invoices**
  - **edit:invoices**
13. Note down the **Client ID** and **Client Secret** keys.

---

**Important**

The client secret will not be visible after this step.

---

14. Click **Save**.

## HaloPSA ticket type prerequisites

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**Note**

This topic is included for your convenience. The content of this topic is accurate as of February 2025. However, this is a HaloPSA process, and the steps or the UI can change without informing Acronis.

For the official instructions, see [the HaloPSA guides](#).

---

To make sure the integration fetches all ticket types from HaloPSA, the following settings are required:



Configuration > Tickets > **Ticket Types**

Sequence	Name
1	Request
10	Incident
30	Change Request
40	Service Request
41	Information Request
100	Child Internal Ticket
101	Internal
102	Quick Time
400	Create User
401	Deactivate User
401	Computer Order
501	Project
502	Project Task

- For the Agent account:
  - Make sure that on the **Permissions** tab of the Agent account, there are no **Ticket Type** restrictions on this account. This will allow you to add new ticket types.
- For the **Ticket type** configuration, set the field values in the following way:
  - **Use: Tickets**
  - **Visible in lists for Agents: Yes**

Configuration > Tickets > Ticket Types

← Edit Access Control Clone Delete

## Service Request

Details Defaults Field List Allowed Values

Ticket Type Name	Service Request
Sequence in lists	40
ITIL Ticket Type	Service Request
Use	Tickets
Visible in lists for Agents	Yes

- **Field List:** can be completely empty, but if any field is added, it must be without **Agent New Ticket Screen Visibility: Visible - Required**

## Edit Field - Desktop Type (CFdesktopType)

End-User New Ticket Screen Visibility \*

- ☐ Not Visible
- ☐ Visible - Not Required
- ☐ Visible - Warn if empty
- ☒ Visible - Required
- ☐ Visible - Read Only

End User Ticket Details Screen Visibility \*

- ☐ Not Visible
- ☒ Visible - Show in Ticket information
- ☐ Visible - Show on separate tab

☐ Hidden if empty

Agent New Ticket Screen Visibility \*

- ☐ Not Visible
- ☐ Visible - Not Required
- ☐ Visible - Warn if empty
- ☒ Visible - Required
- ☐ Visible - Read Only

- ☒ Show in Ticket Details
- ☐ Show in Quick Close

Agent Ticket Details Screen Visibility \*

- ☐ Not Visible
- ☐ Visible - Show in Ticket information
- ☒ Visible - Show on separate tab
- ☐ Visible - Show in End-User/Contact details
- ☐ Visible - Show in Closure Details

☐ Hidden if empty

# Activating the integration

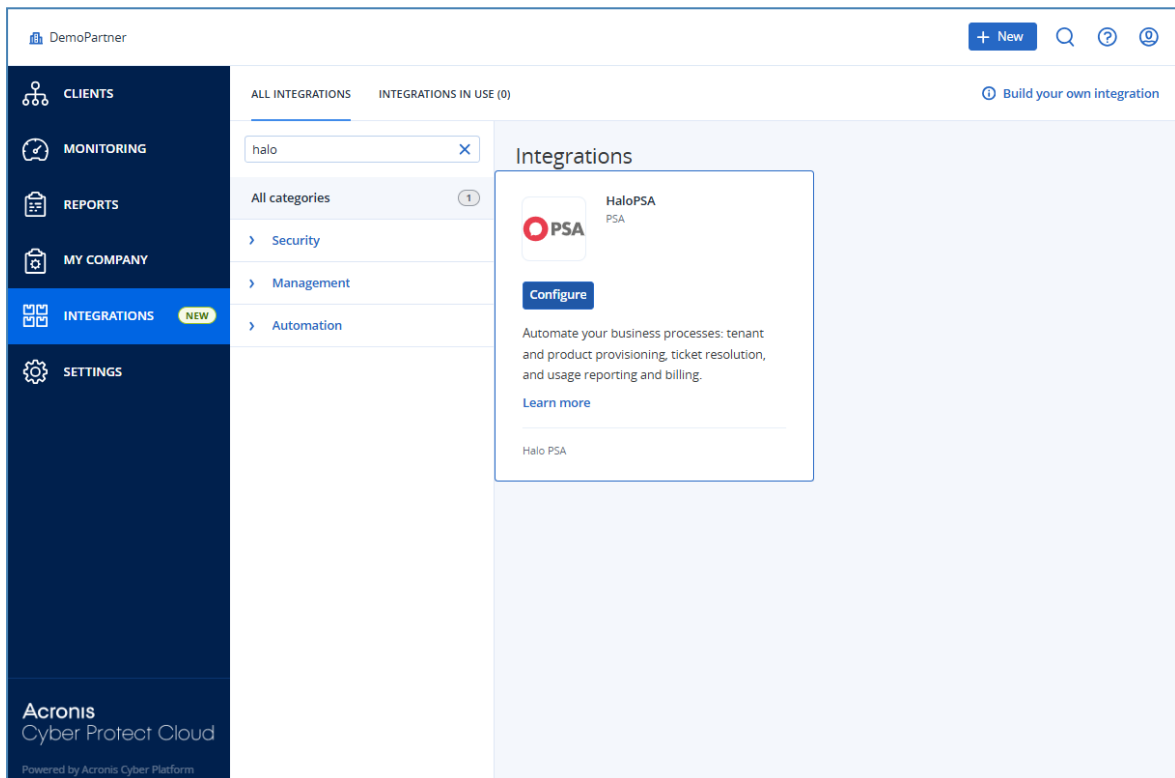
## *To activate the integration*

1. Log in to Acronis Management Portal.
2. Select **INTEGRATIONS** from the main menu.
3. Search for the HaloPSA catalog card.

### Note

For more information, see [the Management Portal partner administrator guide](#).

4. Hover over the HaloPSA catalog card and click **Configure**.



5. Provide your HaloPSA API credentials.

### Note

For more information, see [Obtaining HaloPSA API credentials](#).

The screenshot shows the Acronis Cyber Protect Cloud web interface. On the left is a dark blue sidebar with navigation links: CLIENTS, MONITORING, REPORTS, MY COMPANY, INTEGRATIONS (marked with a 'NEW' badge), and SETTINGS. The main content area has a header with 'DemoPartner' and a '+ New' button. Below the header, there are tabs for 'HALOPSA' and 'SETUP'. The 'SETUP' tab is active, displaying a 'HaloPSA' configuration form. The form includes instructions to provide credentials for an existing HaloPSA account, a link to documentation, and input fields for 'Client ID', 'Client secret', 'Resource server', 'Authorization server', and 'Tenant (optional)'. A 'Save' button is at the bottom of the form. The footer of the sidebar reads 'Acronis Cyber Protect Cloud' and 'Powered by Acronis Cyber Platform'.

6. Click **Save**.

---

### Important

To avoid mapping errors, we recommend that you proceed to configure and set up the integration in this order:

1. [Map services](#).
  2. [Add mapped Acronis offering items to HaloPSA recurring invoices](#).
  3. [Map customers](#).
-

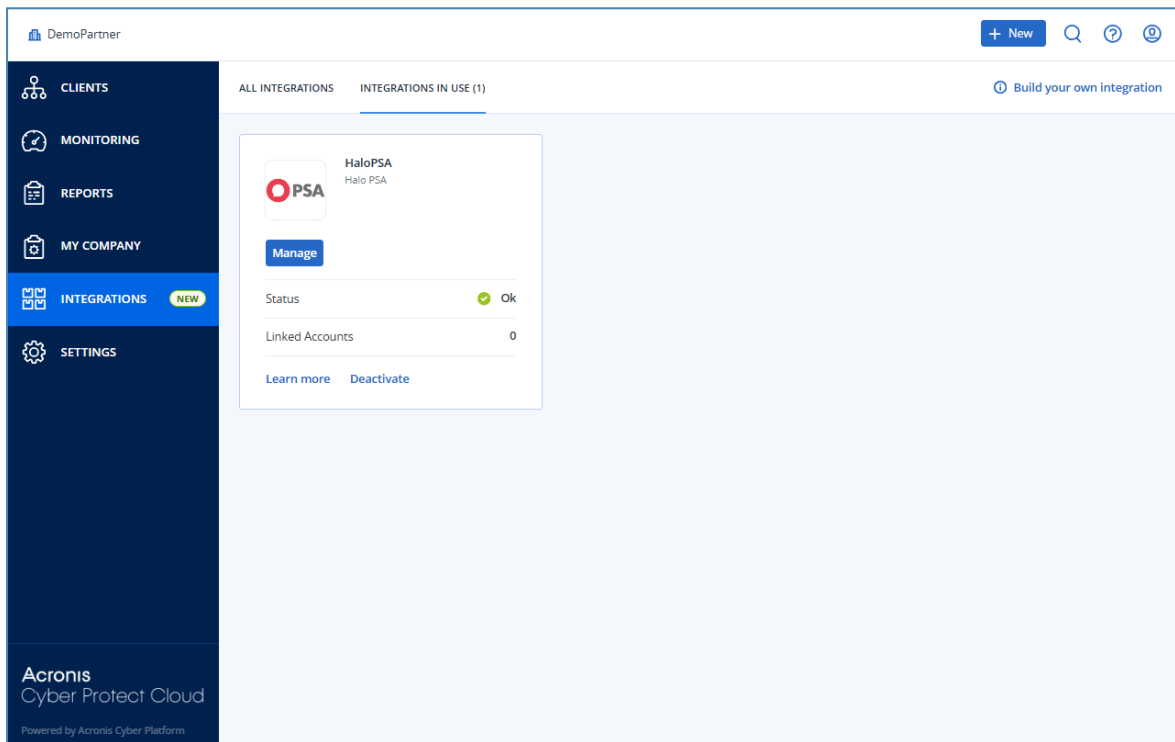
# Opening the integration

## *To open the integration*

1. Log in to Acronis Management Portal as administrator.
2. Select **INTEGRATIONS** on the main menu.
3. Select the **INTEGRATIONS IN USE** tab.
4. Locate the HaloPSA integration catalog card.

### Note

For more information, see [the Management Portal partner administrator guide](#).



5. Click **Manage**.

# Settings

The **INTEGRATION SETTINGS** tab contains sections for:


- [Credentials](#)  
Used to manage API access to your HaloPSA account.
- Features  
Used to manage which features of the integration are enabled, and the settings for each feature.  
This contains subsections for:
  - [Customer mapping](#)
  - [Product mapping](#)
  - [Ticket mapping](#)

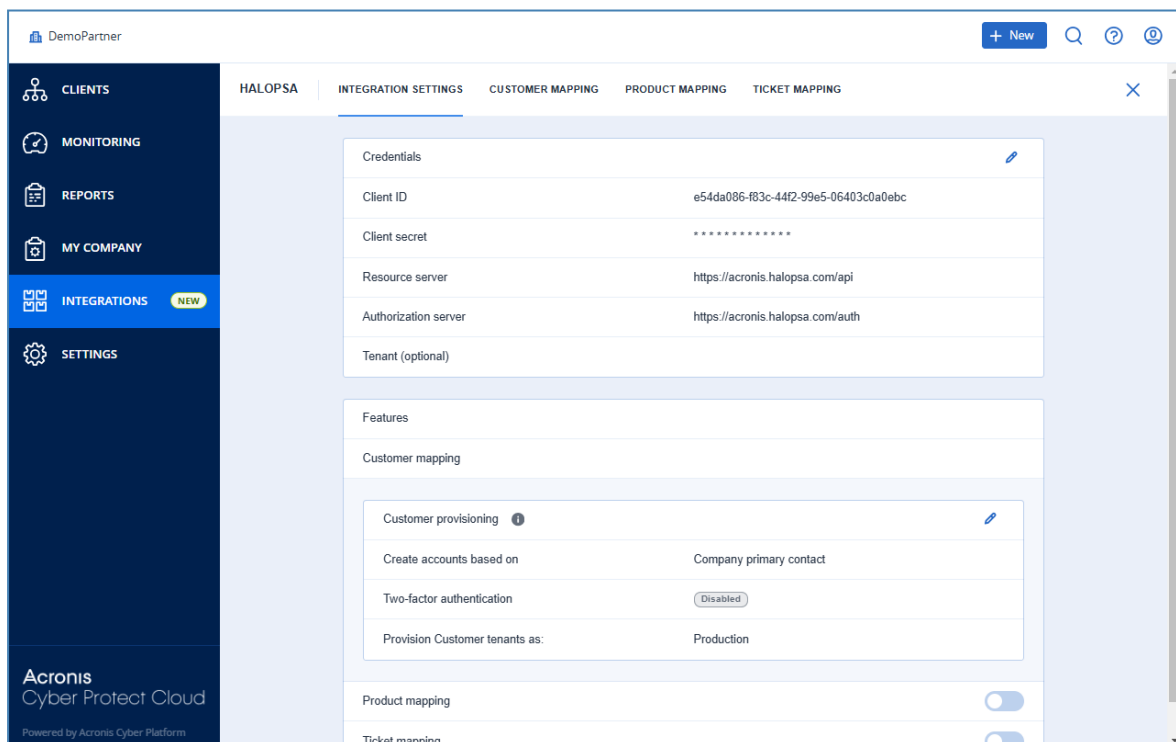
## **To open integration settings**

1. [If required] [Open the integration](#).
2. Select the **INTEGRATION SETTINGS** tab.

# Changing HaloPSA credentials

## **To change HaloPSA credentials**

1. [Open the integration](#).
2. Select the **INTEGRATION SETTINGS** tab.
3. In the **Credentials** section, click .



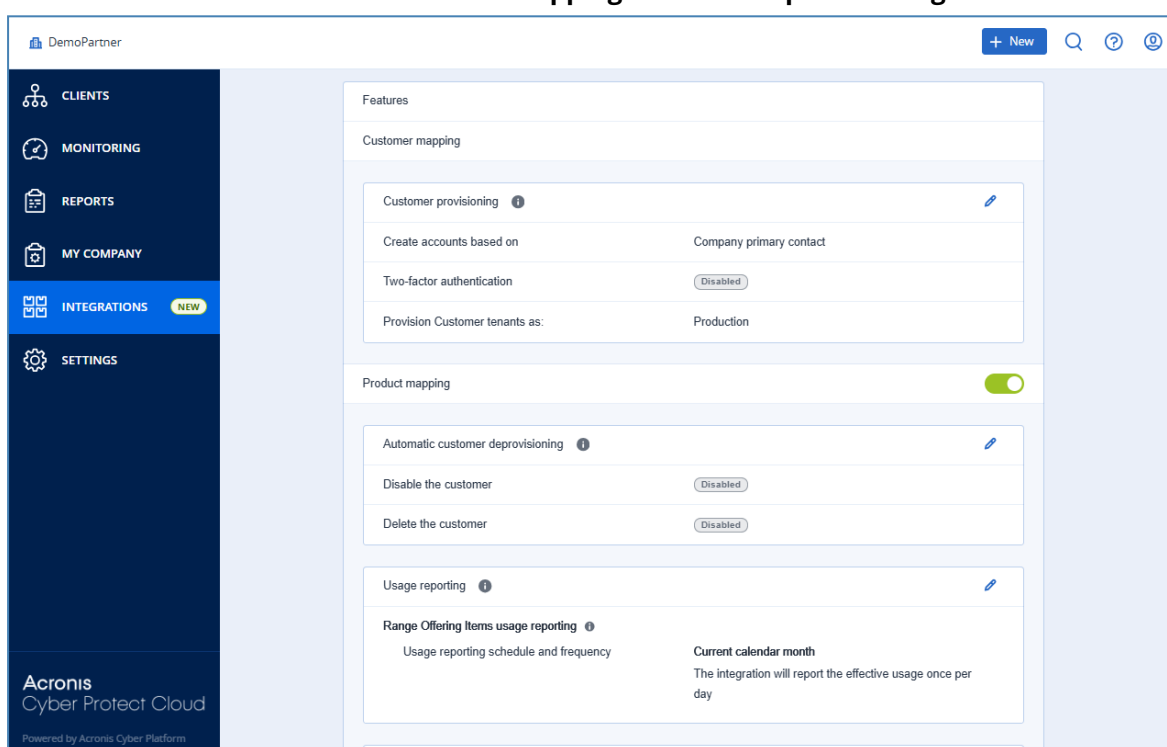
4. Enter the new **Client ID**, **Client secret**, **Resource server**, **Authorization server**, and (optionally) **Tenant** information.
5. Click ✓ to accept your changes.

## Customer provisioning defaults

The integration uses these defaults to provision new Acronis customer tenants and their administrator accounts.

### To set customer provisioning defaults

1. [Open the integration](#).
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Customer mapping > Customer provisioning** section.



4. Click to edit the settings.
5. Select the **Create accounts based on** setting from the dropdown list:
  - **Company primary contact.**  
The integration will create Acronis administrator user accounts based on the HaloPSA customer primary contact data.
    - Acronis **Login** = HaloPSA primary contact **<first name><last name>**.
    - Acronis **Email** = HaloPSA primary contact **<email>**
    - Acronis **First name** = HaloPSA primary contact **<first name>**
    - Acronis **Last name** = HaloPSA primary contact **<last name>**
  - **Company name.**



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**Note**

You must enter the **Activation email** address if you select this option.

---

The integration will create Acronis administrator user accounts with:

- Acronis **Login** = the HaloPSA customer company name.
- Acronis **Email** is set to the **Activation email** value.

---

**Important**

Acronis sends an activation email to the new administrator user. This email includes a link to set the account password.

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6. Turn the **Two-factor authentication** toggle switch on or off.  
If turned on, new customer tenants are provisioned with two-factor authentication.

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**Note**

For more information, see [the Management Portal Partner Administrator guide](#).

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7. Select the **Provision customer tenants as** setting from the dropdown list:
  - **Production** (default).
  - **Trial**.

---

**Note**

Customers in trial mode have full access to all integration functionality, for the duration of the trial.

They are automatically switched to production mode after 30 days.

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8. Click  to accept your changes.

## Product mapping settings

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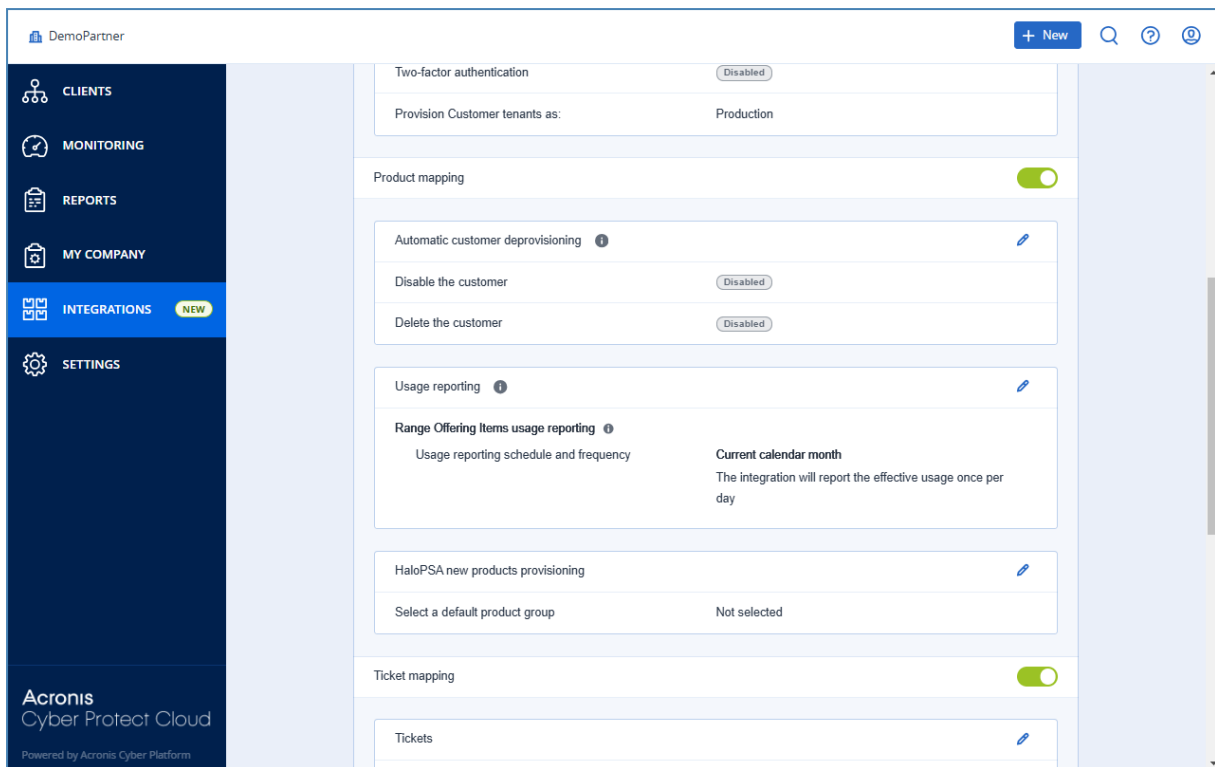
**Note**

When you enable the product mapping feature, you also automatically enable the quota and usage synchronization process. For more information, see [Quota and usage synchronization](#).

---

When the product mapping feature is enabled, in the **Product mapping** tab, you can define settings for:

- [Automatic customer deprovisioning](#)
- [Usage reporting](#)
- [HaloPSA new product provisioning](#)



## Automatic customer deprovisioning

### Warning!

Automatic Acronis customer tenant deprovisioning settings are destructive, and cannot be undone. Care should be taken when enabling or configuring them.

When certain inactivity conditions are met, the integration can automatically deprovision mapped Acronis customer tenants. The conditions are:

- The HaloPSA customer must have an expired recurring invoice.
- No Acronis products found on the recurring invoice for the customer during provisioning synchronization.

### Levels of deprovisioning

Automatic Acronis customer tenant deprovisioning has two levels of action:

- The customer is disabled.  
Before disablement, a set number of days must pass since the contract has not had any lines with services mapped to Acronis offering items.
- The customer is deleted.  
Before deletion, a set number of days must pass since the contract has not had any lines with services mapped to Acronis offering items.


### To configure automatic customer deprovisioning

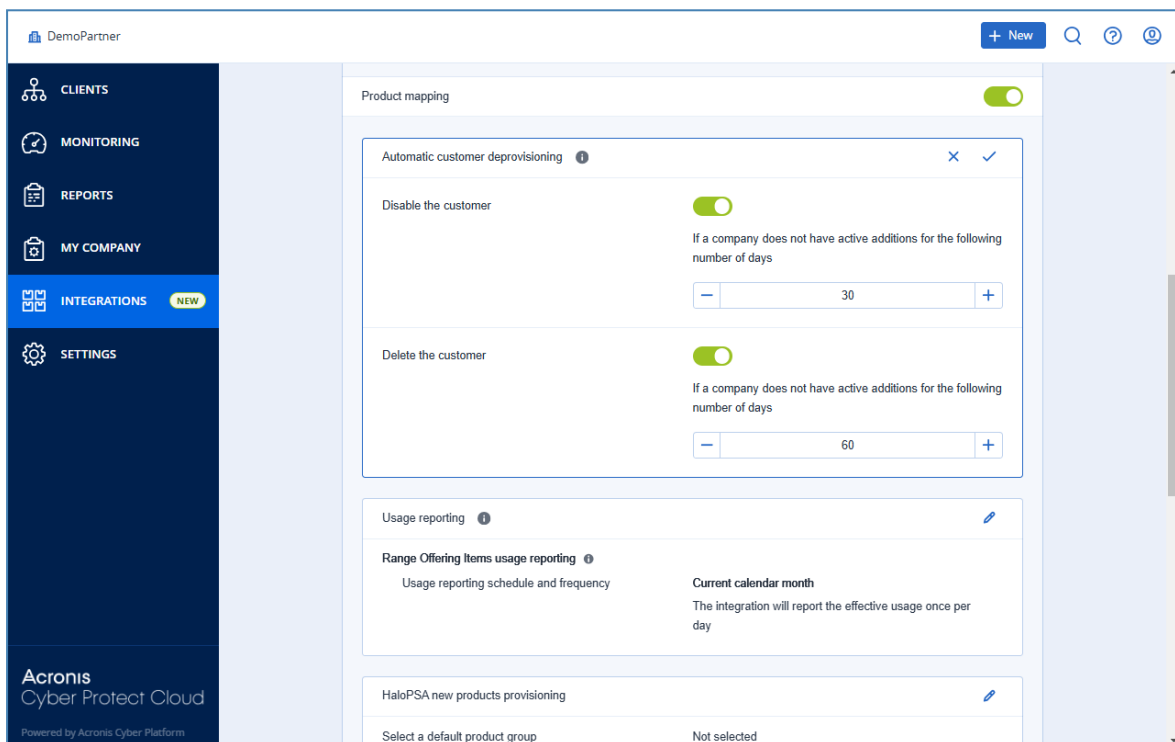
1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Service mapping > Automatic customer deprovisioning** section.


#### Note

If the **Automatic customer deprovisioning** section is not visible, you must enable **Product mapping**.

When you enable the product mapping feature, you also automatically enable the quota and usage synchronization process. For more information, see [Quota and usage synchronization](#).

4. Click  to edit the setting.



5. Turn the **Disable the customer** toggle switch on or off.  
If you enable this option, you must use the number picker to specify how many days a company must not have active additions before Acronis customer tenants are disabled.  
The default number of days is 30. The maximum number of days is 365.
6. Turn on or turn off **Delete the customer**.  
If you enable this option, you must use the number picker to specify how many days a company must not have active additions before Acronis customer tenants are deleted.  
The default number of days is 30. The maximum number of days is 365.
7. Click .

## Configuring usage reporting

For range offering items, you can configure the usage reporting period. Range offering items are a type of usage, such as Compute Points in DR, where usage calculation is reset every month.

Use this setting to synchronize that reset with your billing cycle.


### To configure usage reporting

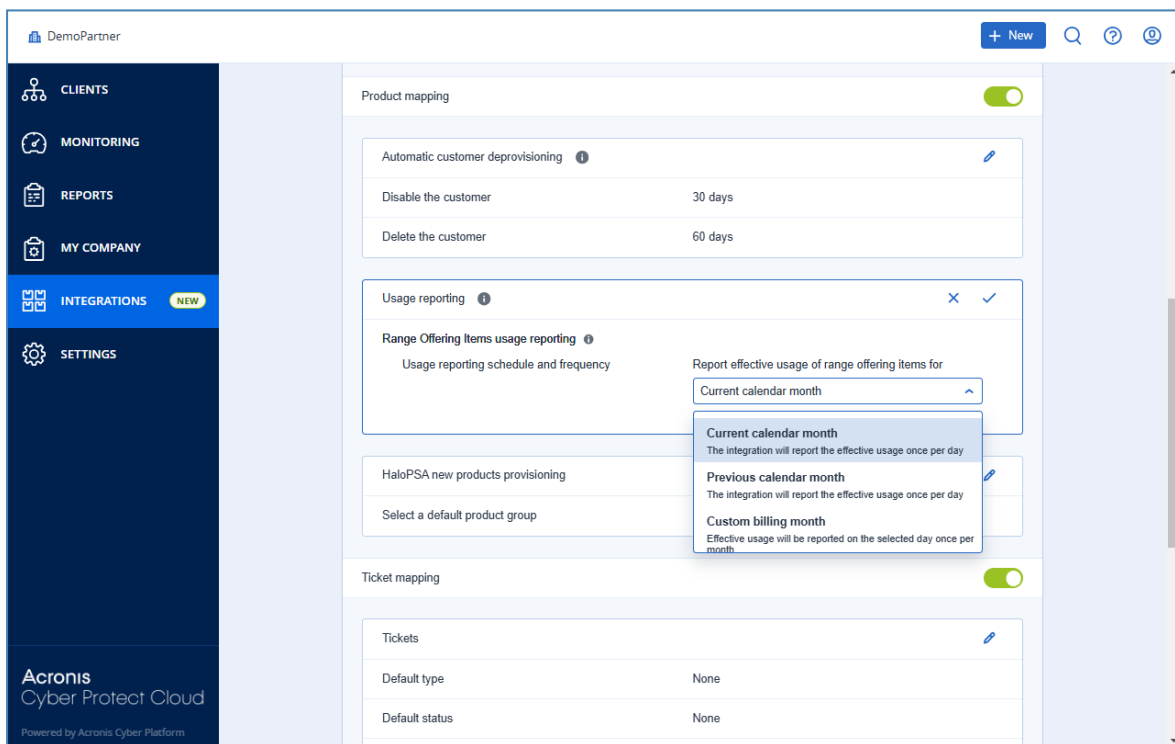
1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Product mapping > Usage reporting** section.

#### Note

If the **Automatic customer deprovisioning** section is not visible, you must enable **Product mapping**.

When you enable the product mapping feature, you also automatically enable the quota and usage synchronization process. For more information, see [Quota and usage synchronization](#).

4. Click  to edit the setting.



5. Select the usage reporting period from the **Report effective usage of range offering items for** dropdown list:
  - **Current calendar month.**  
The integration will report the effective usage once per day.
  - **Previous calendar month.**  
The integration will report the effective usage once per day.

- **Custom billing month.**

The **Report once per month on the selected day** number selector appears. You must choose a day of the month, up to the 28th, on which reporting should be done.

Effective usage will be reported on the selected day, once per month.

6. Click ✓ .

## New products provisioning

### *To configure new products provisioning*

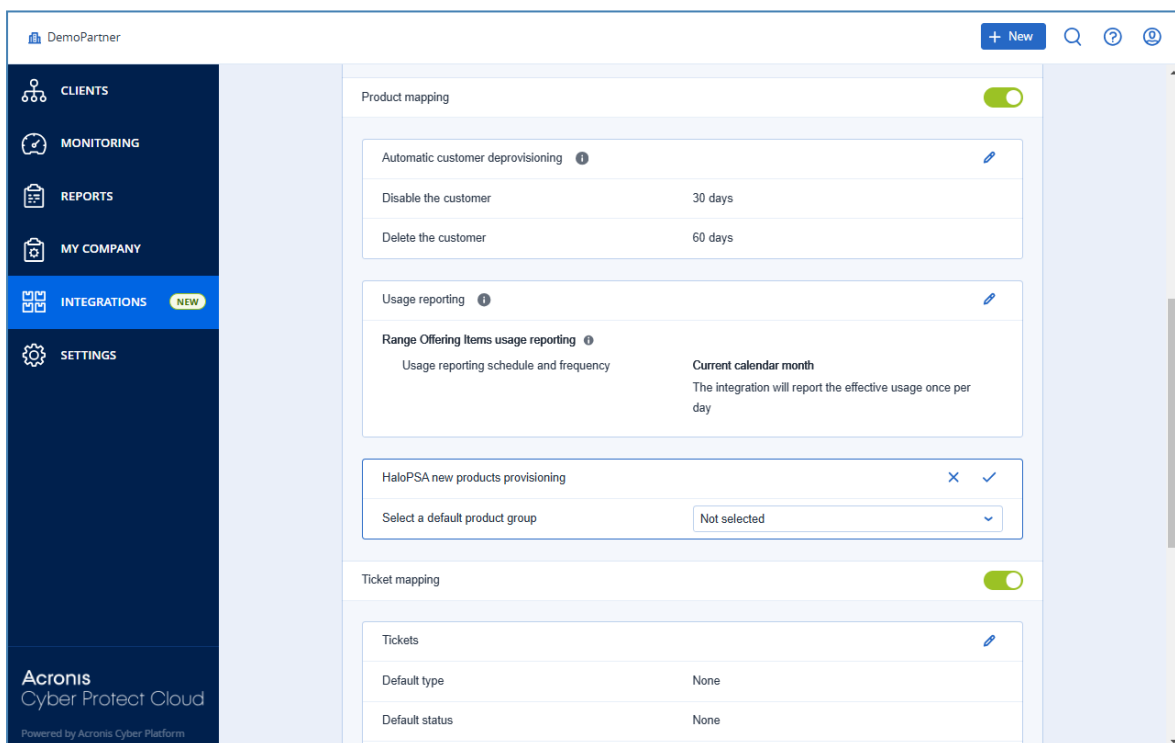
1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Product mapping > HaloPSA new products provisioning** section.

#### Note

If the **Automatic customer deprovisioning** section is not visible, you must enable **Product mapping**.

When you enable the product mapping feature, you also automatically enable the quota and usage synchronization process. For more information, see [Quota and usage synchronization](#).

4. Click ✎ to edit the setting.



5. Select a default product group from the dropdown list.
6. Click ✓ .

# Ticket mapping settings

In the **Ticket mapping** section, you can define settings for:

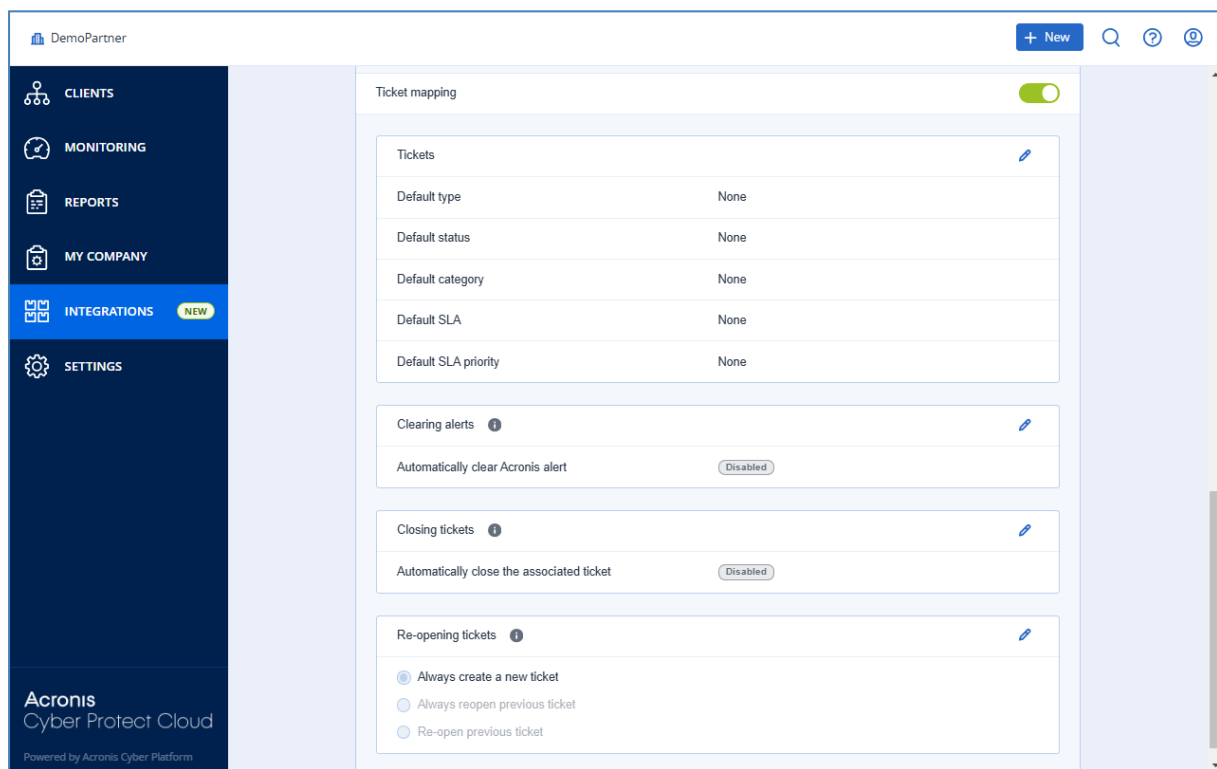
- [Ticket mapping defaults](#)
- [Clearing Acronis alerts](#)
- [Closing HaloPSA tickets](#)
- [Reopening HaloPSA tickets](#)

## Note

These options are only available if **Ticket mapping** is enabled.

If **Ticket mapping** is disabled, enable it by turning on the toggle switch.

You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.



## Ticket mapping defaults

Ticket mapping defaults pre-populate the fields when you map tickets in the **TICKET MAPPING** tab.

## Note

The available values for each default depend on the configuration of HaloPSA.

### *To set ticket mapping defaults*


1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to **Features > Ticket mapping**.

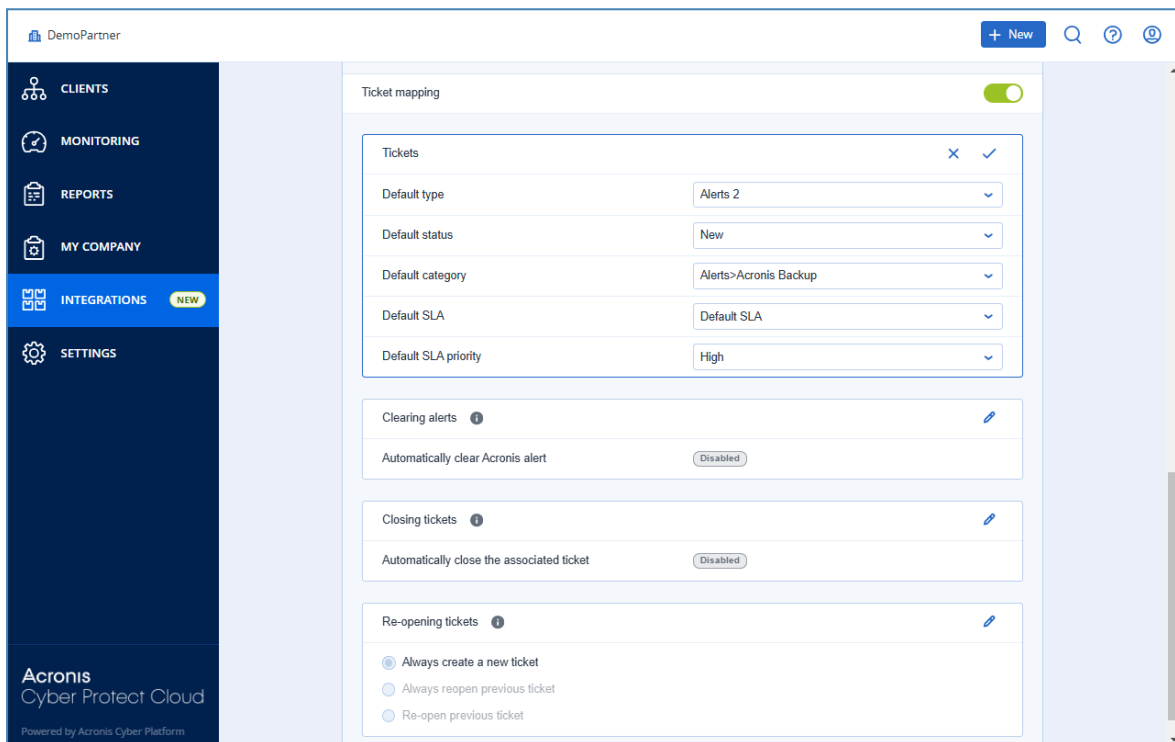
### Note

This option is only available if **Ticket mapping** is enabled.

If **Ticket mapping** is disabled, enable it by turning on the toggle switch.

You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.

4. Click  to edit the settings.



5. [Optional] Select the **Default type** from the dropdown list.

### Note

The list of available types depends on the type configuration in HaloPSA, because certain ticket types cannot be used for ticket sync in this integration.

Ticket types that match any of the following conditions do not appear as options in the **Default type** dropdown list:

- If the type has a different use than for tickets.
- If the type has a required field that is used in the ticket.
- If the type has a group that includes a required field.
- If the type has an approval process.

6. [Optional] Select the **Default status** from the dropdown list.

7. [Optional] Select the **Default category** from the dropdown list.
8. [Optional] Select the **Default SLA** from the dropdown list.
9. [Optional] Select the **Default SLA priority** from the dropdown list.
10. Click ✓ .

## Clearing alerts

The integration can clear source Acronis alerts when their corresponding tickets change to a specific status in HaloPSA.

### To clear alerts

1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Ticket mapping > Clearing alerts.**

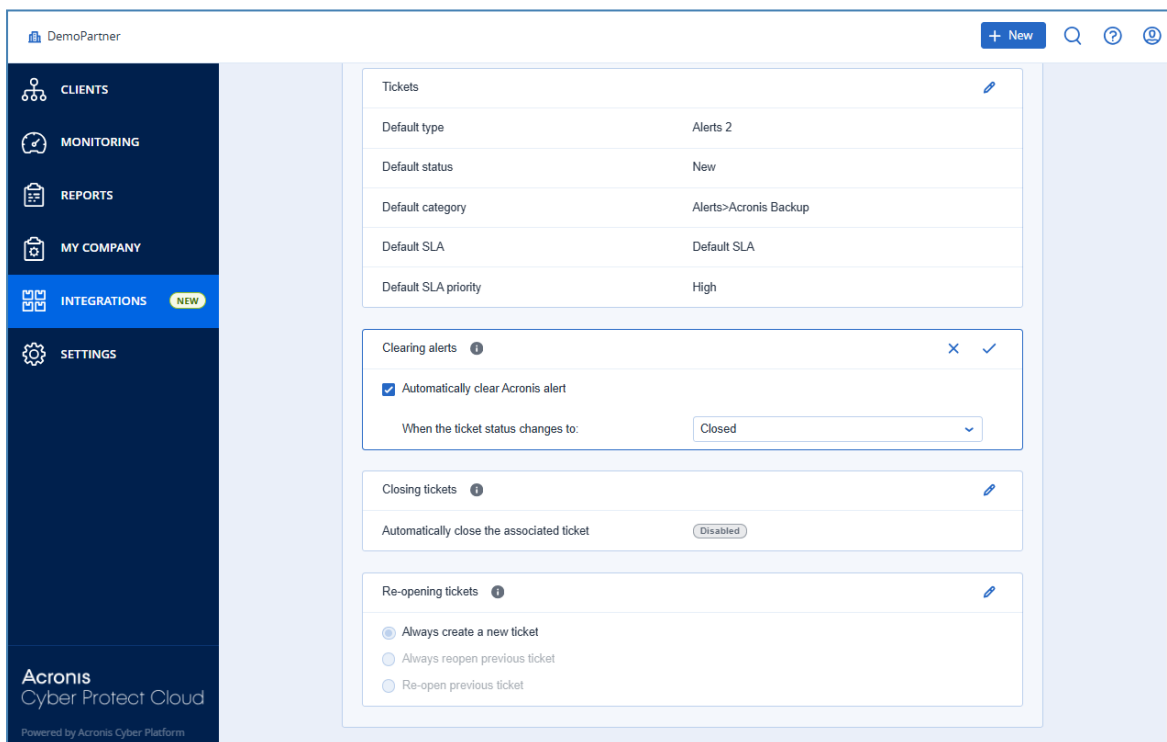
#### Note

This option is only available if **Ticket mapping** is enabled.

If **Ticket mapping** is disabled, enable it by turning on the toggle switch.

You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.

4. Click  to edit the settings.



The screenshot shows the 'DemoPartner' integration settings page. The left sidebar contains navigation links: CLIENTS, MONITORING, REPORTS, MY COMPANY, INTEGRATIONS (highlighted with a 'NEW' badge), and SETTINGS. The main content area is titled 'Tickets' and contains several configuration sections:

- Tickets**: A table with default settings:
 

Default type	Alerts 2
Default status	New
Default category	Alerts>Acronis Backup
Default SLA	Default SLA
Default SLA priority	High
- Clearing alerts**: A section with a toggle switch 'Automatically clear Acronis alert' which is checked. Below it, a dropdown menu 'When the ticket status changes to:' is set to 'Closed'.
- Closing tickets**: A section with a toggle switch 'Automatically close the associated ticket' which is disabled.
- Re-opening tickets**: A section with three radio button options: 'Always create a new ticket' (selected), 'Always reopen previous ticket', and 'Re-open previous ticket'.

5. Select **Automatically clear Acronis alert** to enable the feature.
6. Select a status from the dropdown list.



Alerts will be cleared when the ticket is set to the selected status.

7. Click ✓.

## Closing tickets

The integration can automatically close HaloPSA tickets which originated from Acronis alerts when the Acronis alert is cleared, either manually or automatically.

### To close tickets


1. [Open the integration.](#)
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Ticket mapping > Closing tickets**.

#### Note

This option is only available if **Ticket mapping** is enabled.

If **Ticket mapping** is disabled, enable it by turning on the toggle switch.

You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.

4. Click  to edit the settings.

5. Select **Automatically close the associated ticket** to enable the feature.
6. Select the status to which to set the ticket from the dropdown list.
7. [Optional] Enter a note to add to the ticket.
8. Click ✓.

## Reopening tickets

When an Acronis alert is raised again on the same device within a certain amount of time, the integration can either always create a new HaloPSA ticket, or always reopen the previous ticket, or reopen the previous ticket only if the alert reoccurs within a specific time frame after closing the previous ticket.

### To reopen tickets


1. [Open the integration](#).
2. Select the **INTEGRATION SETTINGS** tab.
3. Scroll down to the **Features > Ticket mapping > Re-opening tickets**.

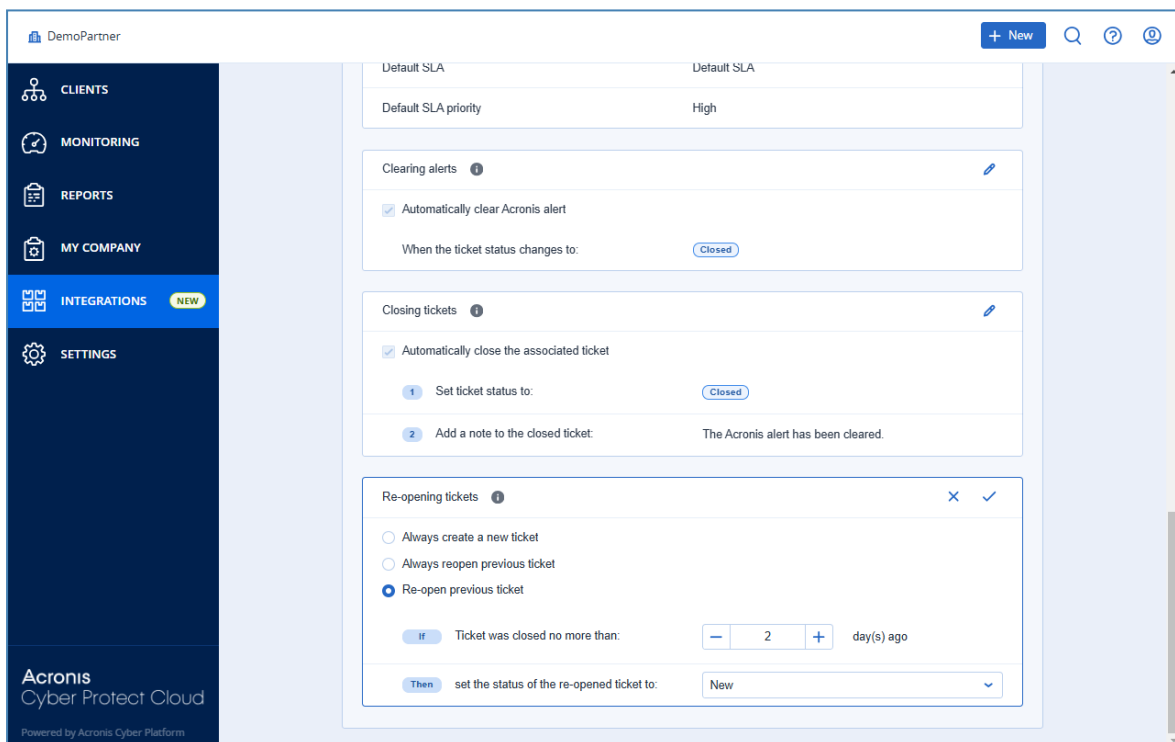
#### Note

This option is only available if **Ticket mapping** is enabled.

If **Ticket mapping** is disabled, enable it by turning on the toggle switch.


You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.

4. Click  to edit the settings.



The screenshot shows the 'DemoPartner' interface with a sidebar on the left containing navigation links: CLIENTS, MONITORING, REPORTS, MY COMPANY, INTEGRATIONS (highlighted with a 'NEW' badge), and SETTINGS. The main content area displays the 'Integration Settings' for 'DemoPartner'. It includes sections for 'Default SLA', 'Clearing alerts', 'Closing tickets', and 'Re-opening tickets'. The 'Re-opening tickets' section is expanded, showing three radio button options: 'Always create a new ticket', 'Always reopen previous ticket', and 'Re-open previous ticket' (which is selected). Below these options, there is a conditional logic section with 'If' and 'Then' clauses. The 'If' clause is 'Ticket was closed no more than: 2 day(s) ago'. The 'Then' clause is 'set the status of the re-opened ticket to: New'.

5. Select **Always create a new ticket**, **Always reopen the previous ticket**, or **Reopen previous ticket**.
6. [If you selected **Reopen previous ticket**] Specify the maximum number of days to have passed since the previous tickets closed in the **Ticket was closed no more than** number counter. (the maximum is 365 days)

7. [If you selected either of the reopen options] Specify the status of the ticket after reopening in the **set the status of the reopened ticket to** dropdown list.
8. Click .

# Products

You can map Acronis services and offering items with existing HaloPSA products or create new HaloPSA products to which to map.

The [integration service mapping wizard](#) helps you configure which Acronis services and offering items to map to HaloPSA products.

## Mapping products for the first time

Prior to mapping services for the first time, we recommend that you define the product mapping settings.

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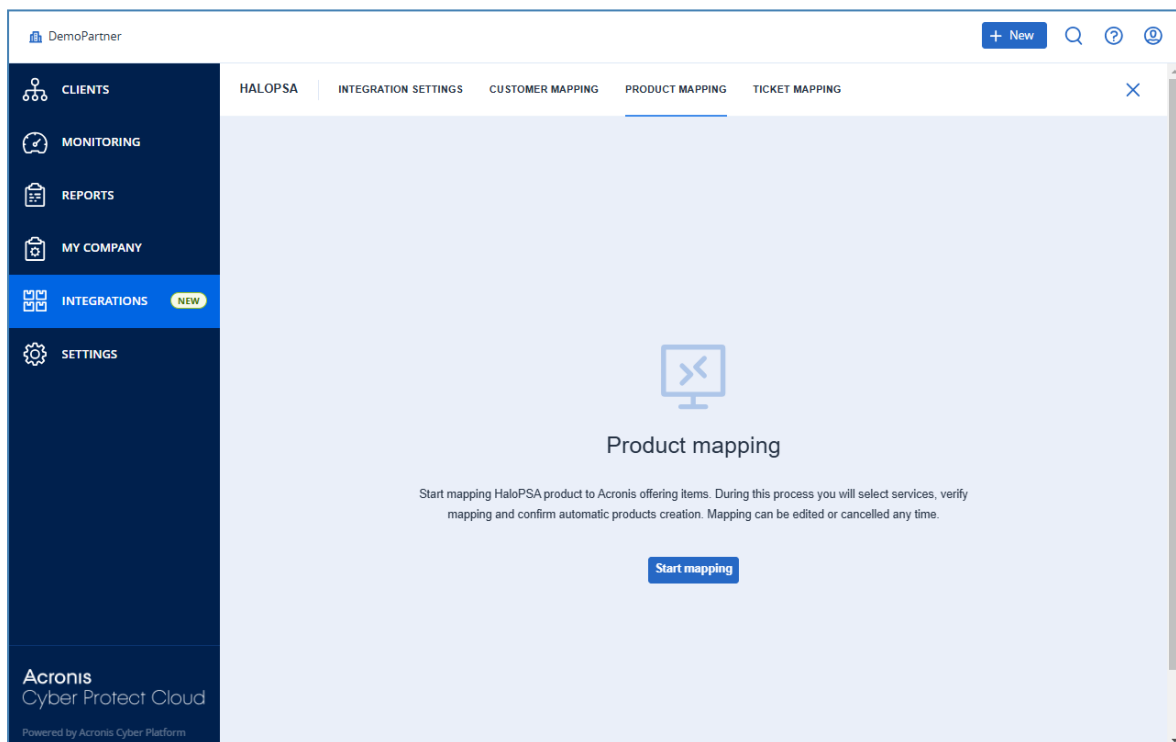
### Note

For more information, see [Product mapping settings](#).

---

#### *To map products for the first time*

1. [Open the integration.](#)
2. Select the **PRODUCT MAPPING** tab.
3. [If product mapping is not already enabled] Click **Enable**.



4. Click **Start mapping**.
5. Follow the steps in the product mapping wizard.

---

### Note

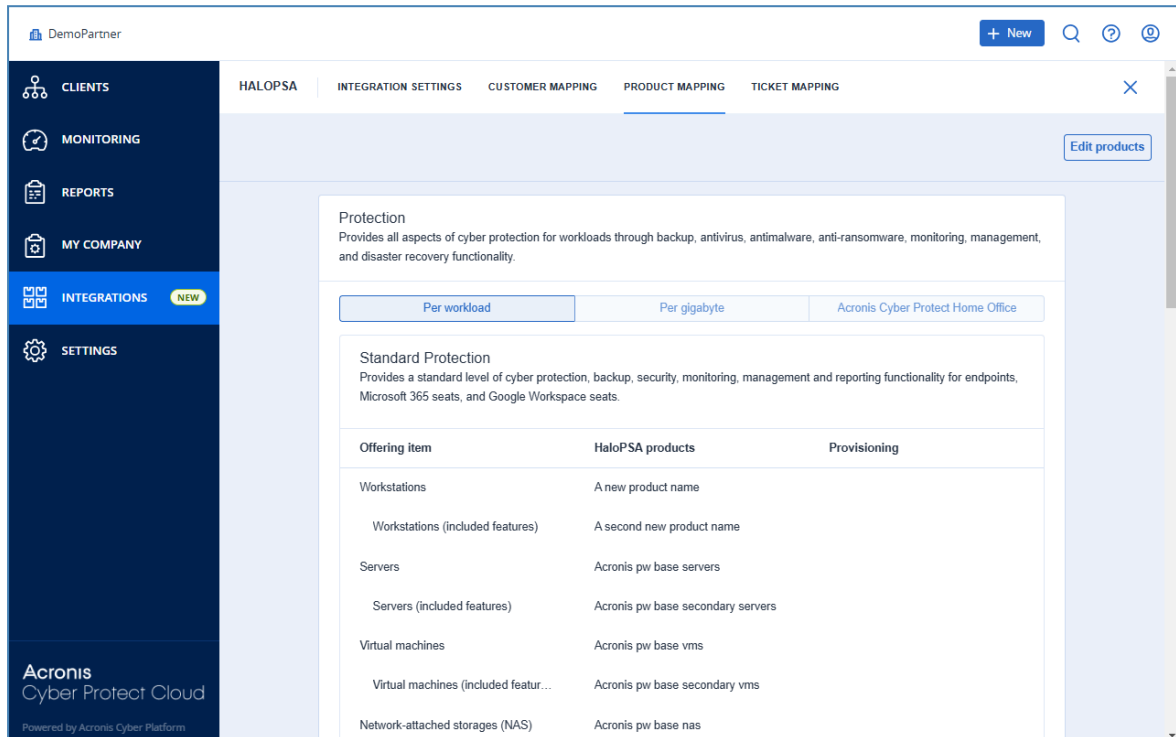
For more information, see [The product mapping wizard](#).

---

# Modifying product mappings

## To modify product mappings

1. [Open the integration.](#)
2. Select the **PRODUCT MAPPING** tab.



3. Click **Edit products**.
4. Follow the steps in the product mapping wizard.

### Note

For more information, see [The product mapping wizard](#).

## The product mapping wizard

1. Select the Acronis services and advanced packs, and the corresponding billing modes that you want to be available to map to HaloPSA products in the next step.  
By default, all Acronis services, advanced packs, and billing modes are selected. We recommend that you leave this default: you do not need to map all the possible combinations.

### Note

Only services, advanced packs, and billing modes enabled at partner level are available for mapping.

2. Click **Next**.

Offering item	HaloPSA product	Provisioning
<input type="checkbox"/> Workstations	Acronis pw base workstations	
<input type="checkbox"/> Workstations (included features)	Acronis pw base secondary wor	

3. Select the **Default storage** from the dropdown list.

4. Configure the product mappings.

**Map to an existing HaloPSA product**

---

**Note**

The integration pre-populates the **HaloPSA product** column with product name suggestions. If accepted, these suggestions will be created as new HaloPSA products in the final step.

---

You can override these suggestions by selecting from a list of HaloPSA products available for mapping. The available HaloPSA products must have **Active** status. The integration product name suggestions also appear in the list.

- a. Select the offering item line item checkbox.
- b. [To change the default HaloPSA product] Click the **HaloPSA product** setting for the line item.

Offering item	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Workstations	Acronis pw base workstation:	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Workstations (included features)		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Servers		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Servers (included features)		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Virtual machines		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Virtual machines (included features)		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Network-attached storages (NAS)	Acronis pw base nas	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Web hosting servers	Acronis pw base web hosting	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Web hosting servers (included features)	Acronis pw base secondary v	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Mobile devices	Acronis pw base mobiles	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Microsoft 365 seats	Acronis pw base m365 seats	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Microsoft 365 seats (included features)	Acronis pw base secondary n	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Partner geo-redundant protected	Acronis pw base m365 seats	

- c. Click the down arrow and locate the product in the list of available HaloPSA products.
- d. [Optional] In the **Search** box, start typing part of the product name.  
The search is dynamic: it will refine the list as you type.
- e. Select the desired HaloPSA product from the list and click **Apply**.

**Map to a new HaloPSA product**

---

**Note**

The integration pre-populates the **HaloPSA product** column with product name suggestions. If accepted, these suggestions will be created as new HaloPSA products in the final step.

---

You can override these suggestions with your own product names, which will be created as new HaloPSA products in the final step.

- a. Select the offering item line item checkbox.
- b. Click the **HaloPSA product** setting for the line item.

- c. Click in the product name field and type the name of the new HaloPSA product.

Offering item	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Workstations	Acronis pw base workstation:	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Servers		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Virtual machines		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Network-attached storages (NAS)	Acronis pw base nas	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Web hosting servers	Acronis pw base web hosting	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Mobile devices	Acronis pw base mobiles	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Microsoft 365 seats	Acronis pw base m365 seats	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Partner geo-redundant protected	Acronis pw base m365 seats	<input type="checkbox"/> Free

- d. Click **Apply**.

### ***Map as free provisioning***

Offering items marked as free provisioning can be mapped to products and will be enabled for all mapped Acronis customers.

Their quota will be forced to unlimited.

Free provisioning offering items are excluded from the quota update and usage report synchronization process.

- a. Select the offering item line item checkbox.
- b. Select the **Free** checkbox.



PRODUCT MAPPING WIZARD

Select services

Select offering items

Summary

<input checked="" type="checkbox"/> Offering item	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Workstations	A new product name	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Workstations (included features)	Acronis pw base secondary w	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Servers	A second new product name	<input checked="" type="checkbox"/> Free
<input checked="" type="checkbox"/> Servers (included features)	Acronis pw base secondary s	<input checked="" type="checkbox"/> Free
<input checked="" type="checkbox"/> Virtual machines	Acronis pw base vms	<input checked="" type="checkbox"/> Free
<input checked="" type="checkbox"/> Virtual machines (included features)	Acronis pw base secondary v	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Network-attached storages (NAS)	Acronis pw base nas	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Web hosting servers	Acronis pw base web hosting	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Web hosting servers (included features)	Acronis pw base secondary w	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Mobile devices	Acronis pw base mobiles	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Microsoft 365 seats	Acronis pw base m365 seats	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Microsoft 365 seats (included features)	Acronis pw base secondary n	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Partner geo-redundant protected	Acronis pw base m365 seats	

Cancel

Next

- Click **Next**.
- [If you entered a new product name] Check the list of new HaloPSA products which will be created.

PRODUCT MAPPING WIZARD

Select services

Select offering items

Create products

Summary

Create new products in HaloPSA

To continue with the product mapping, first you have to create new products in HaloPSA. Click on Create products to continue.

The following new products will be created in HaloPSA

Create products

HaloPSA products	Result
A new product name	—
Acronis pw base secondary workstations	—
A second new product name	—
Acronis pw base secondary servers	—
Acronis pw base vms	—
Acronis pw base secondary vms	—
Acronis pw base nas	—
Acronis pw base web hosting servers	—
Acronis pw base secondary web hosting servers	—
Acronis pw base mobiles	—

Cancel

Next

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7. Click **Create products**.

### Note

The HaloPSA products creation status is indicated. If an error occurs when creating a HaloPSA product, you must return to the previous step and provide a new product name.

New products will have the following properties:

- **Unit price** = 0
- **Cost price** = 0
- **Description** = the service name
- **Status** = active

### Important

Make sure to revise created products before including them in a contract.

8. Click **Next**.

The screenshot shows a 'PRODUCT MAPPING WIZARD' window with a sidebar on the left containing five steps: 'Select services', 'Select offering items', 'Create products', 'Summary', and 'Summary'. The 'Summary' step is selected and highlighted. The main content area is titled 'Summary' and contains a sub-header 'The following features will be mapped'. Below this is a table with two columns: 'Offering item' and 'HaloPSA product'. The table lists various features and their corresponding HaloPSA products. At the bottom right of the wizard, there are 'Cancel' and 'Complete' buttons.

Offering item	HaloPSA product
Workstations	A new product name
Workstations (included features)	A second new product name
Servers	Acronis pw base servers
Servers (included features)	Acronis pw base secondary servers
Virtual machines	Acronis pw base vms
Virtual machines (included features)	Acronis pw base secondary vms
Network-attached storages (NAS)	Acronis pw base nas
Web hosting servers	Acronis pw base web hosting servers
Web hosting servers (included features)	Acronis pw base secondary web hosting servers
Mobile devices	Acronis pw base mobiles
Microsoft 365 seats	Acronis pw base m365 seats
Microsoft 365 seats (included features)	Acronis pw base secondary m365 seats
Partner geo-redundant protected	Acronis pw base m365 seats partner gr

9. Review the product mapping summary and click **Complete**.

Result <span>✕</span>		
Offering items <span>↑</span>	HaloPSA products <span>↓</span>	Status <span>↓</span>
Advanced Backup - Google Workspace seats	Acronis pw pack adv backup gworkspace seats	✓ Mapped
Advanced Backup - Microsoft 365 seats	Acronis pw pack adv backup m365 seats	✓ Mapped
Advanced Backup - Network-attached storages (N...	Acronis pw pack adv backup nas	✓ Mapped
Advanced Backup - Servers	Acronis pw pack adv backup servers	✓ Mapped
Advanced Backup - Virtual machines	Acronis pw pack adv backup vms	✓ Mapped
Advanced Backup - Web hosting servers	Acronis pw pack adv backup web hosting servers	✓ Mapped
Advanced Backup - Workstations	Acronis pw pack adv backup workstations	✓ Mapped
Gmail (incl. Calendar, Contacts)	Acronis pw base google mail	✓ Mapped
Google Drive	Acronis pw base google drive	✓ Mapped
Google Workspace seats	Acronis pw base gworkspace seats	✓ Mapped
Google Workspace Shared Drive	Acronis pw base google team drive	✓ Mapped
Mailboxes	Acronis pw base m365 mailboxes	✓ Mapped
Microsoft 365 seats	Acronis pw base m365 seats	✓ Mapped

Done

10. Check the result summary and click **Done**.

## Adding mapped Acronis offering items to HaloPSA recurring invoices

After you map Acronis offering items to HaloPSA recurring items, they will appear as Recurring Items in your HaloPSA, and you can add them to customer Recurring invoices.

### Note

This topic is included for your convenience. The content of this topic is accurate as of February 2025. However, this is a HaloPSA process, and the steps or the UI can change without informing Acronis.

For the official instructions, see [the HaloPSA guides](#).

### ***To add mapped Acronis offering items to HaloPSA recurring invoices***

1. Go to **HaloPSA** and select a customer.
2. Select **Recurring invoice**.  
You have the option to either add a new recurring invoice or edit an existing one.
3. Choose **Add Recurring Item**.
4. Select the Acronis recurring item that you want to add.

---

**Important**

By default everything is enabled as prepaid at the beginning. If you want to set a recurring item as pay-as-you-go (metered), you must add it to a recurring invoice and set quantity other than 0. Then save it, select it again, select the **Is metered** checkbox, and set the quantity to 0.

---

5. The integration will always check the recurring invoice and then add recurring items from the product mapping.

# Customers

## The customer mapping tab

The **CUSTOMER MAPPING** tab lists all your HaloPSA customers. It displays:

- HaloPSA customer name.
- HaloPSA customer status.
  - **Active**
  - **Inactive**
- The status of the integration mapping for the HaloPSA customer.
  - **Not mapped** indicates that the current HaloPSA customer is not linked to Acronis.
  - **Mapped** indicates that the current HaloPSA customer is linked to the Acronis customer tenant, displayed in the next column.
  - **Mapping error** means that an error occurred with the existing mapping or while trying to apply a new mapping. For more details, click on the information icon right next to the status. Mapping errors will be cleared automatically on the next list reload, when the reason for the failure has been addressed.
- [For mapped HaloPSA customers] The corresponding Acronis customer tenant.

## Mapping customers

There are two ways to map HaloPSA customers to Acronis customer tenants.

### ***Mapping to existing Acronis customer tenants***

If an appropriate Acronis customer tenant already exists, you can map a single HaloPSA customer to it.

---

#### **Note**

For more information, see [Mapping to an existing Acronis customer tenant](#).

---

### ***Provisioning and mapping to new Acronis customer tenants***

If there is no appropriate Acronis customer tenant, the integration can provision a new one and map the HaloPSA customer to it.

---

#### **Note**

For more information, see [Mapping to new Acronis customer tenants](#).

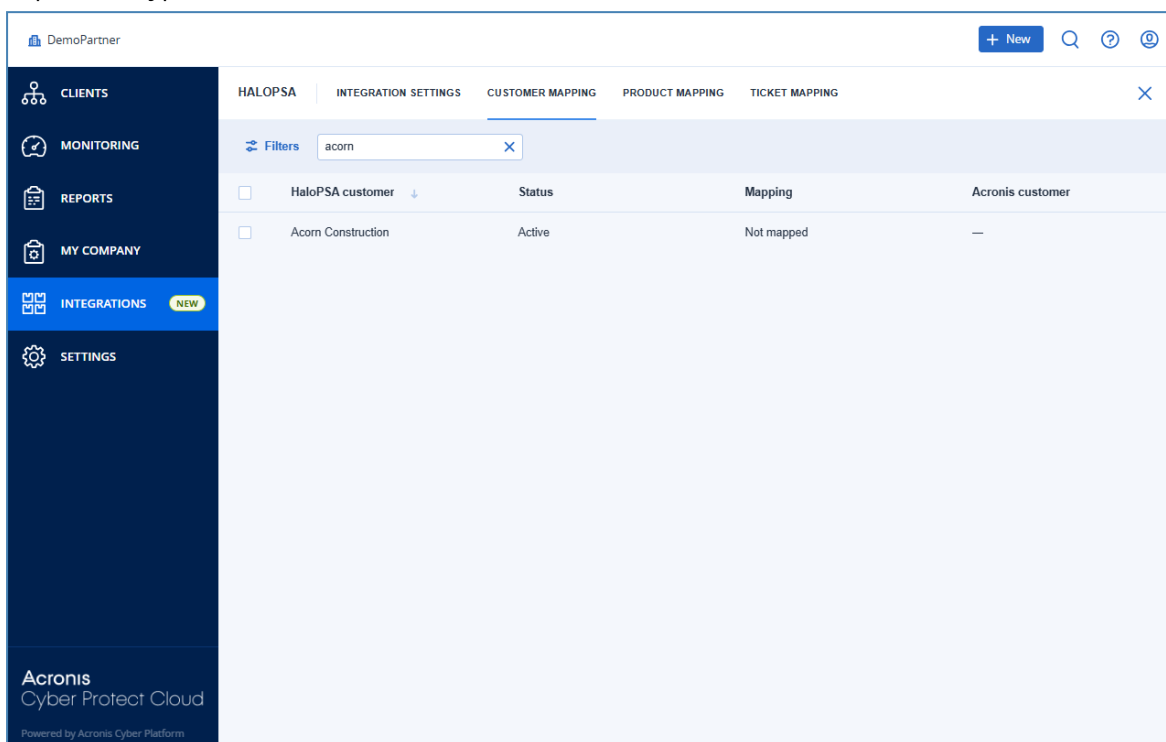
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## Mapping to an existing Acronis customer

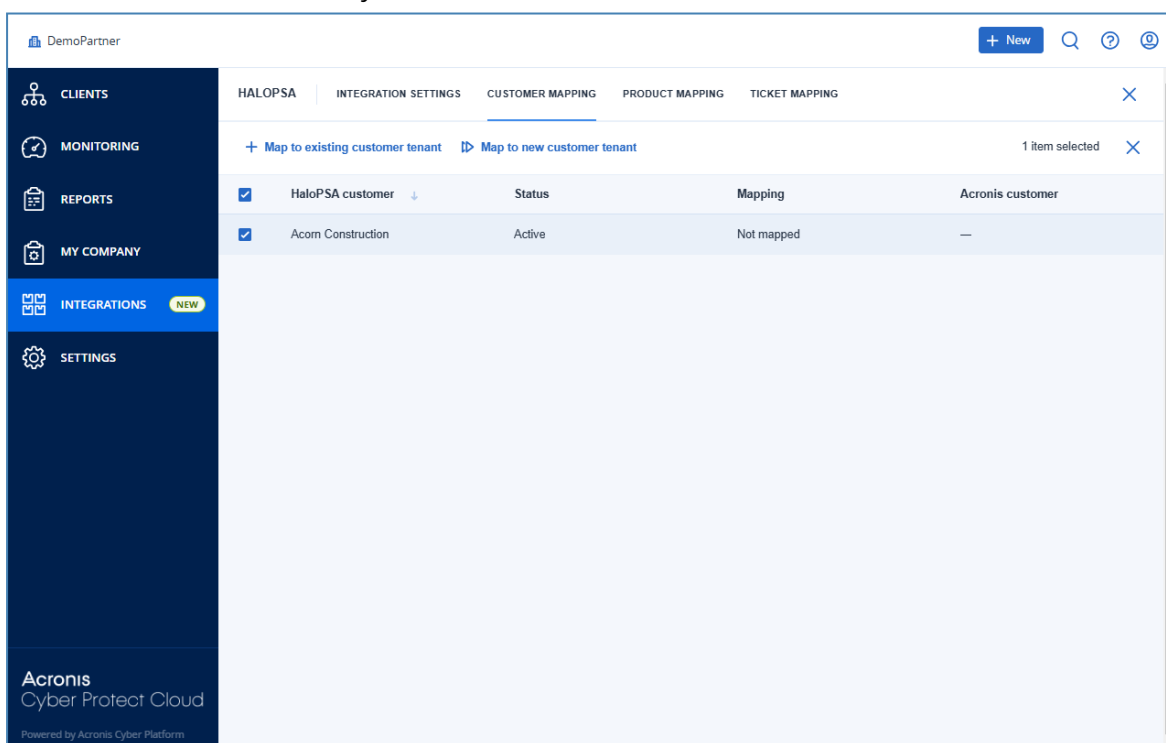
If an appropriate Acronis customer already exists, you can map a single HaloPSA customer to it.

### ***To map to an existing Acronis customer***

1. Open the integration.
2. Select the **CUSTOMER MAPPING** tab.
3. [Optional] Type in the **Search** field to filter the list based on the HaloPSA customer names.



4. [Optional] Click [Filters](#) to refine the contents of the list by **Type**, **Status**, and/or **Mapping**.
5. Select the HaloPSA customer you want to link.



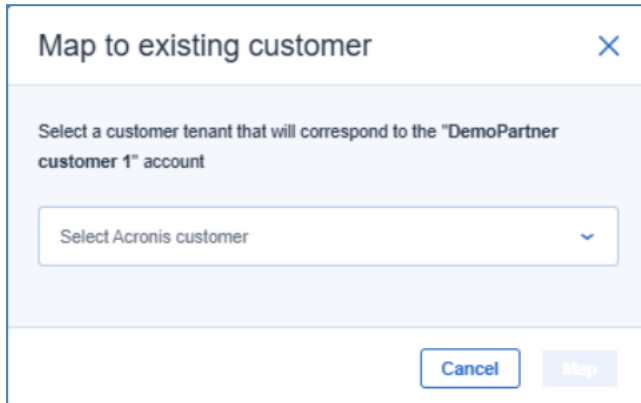
6. Click **Map to existing customer tenant**.

---

**Note**

This button is only available if you select a single HaloPSA customer. You cannot map multiple HaloPSA customers to a single Acronis customer.

---



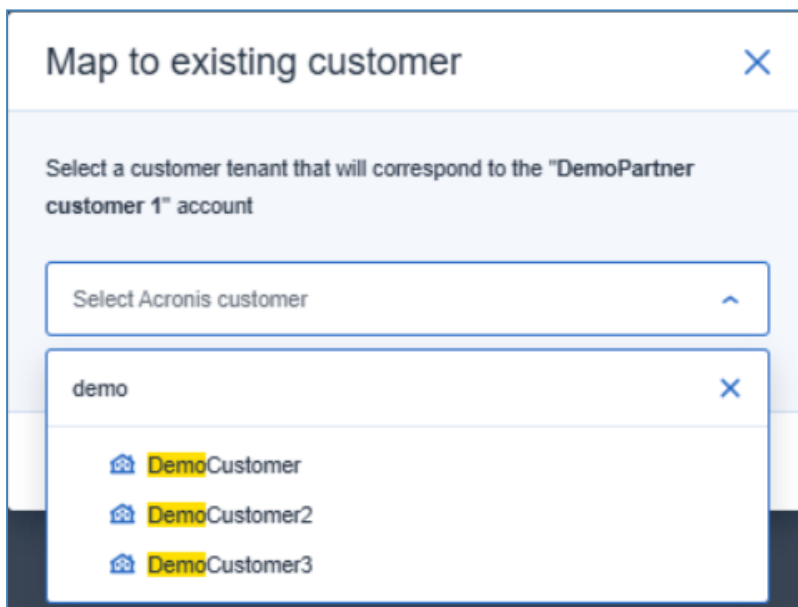
7. Select an Acronis customer tenant from the dropdown.

---

**Note**

Use the **Search** option to filter the list.

---



8. Click **Map**.

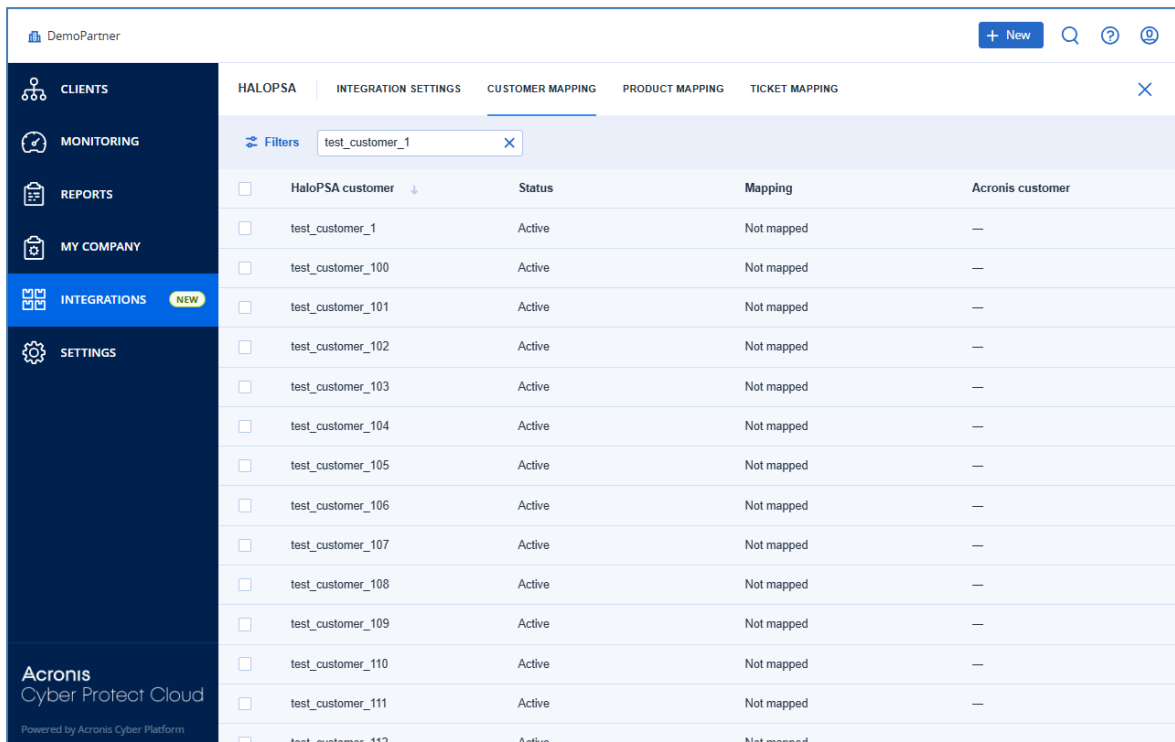
## Mapping to a new Acronis customer

If there is no appropriate Acronis customer, the integration can provision a new customer in Acronis and map the HaloPSA customer to it.


You can select multiple HaloPSA customers for this action. The integration will provision multiple new Acronis customers and map each HaloPSA customer to the corresponding one.

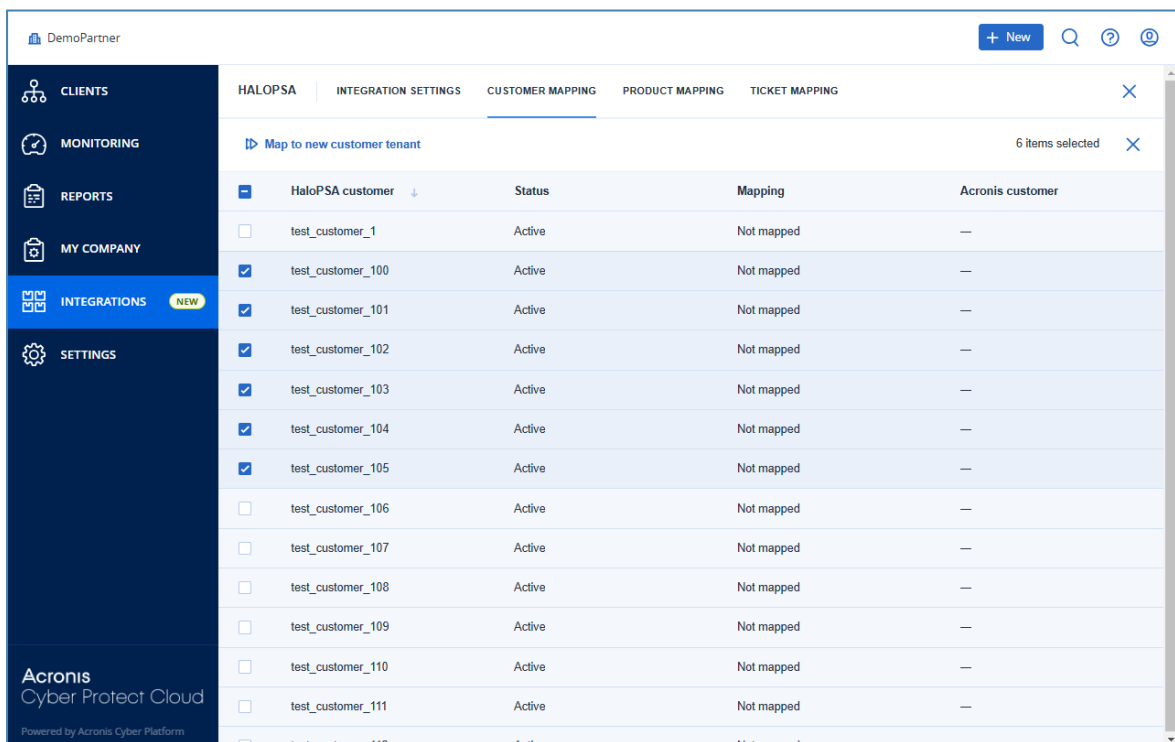
### ***To map to a new Acronis customer***

1. Open the integration.
2. Select the **CUSTOMER MAPPING** tab.
3. [Optional] Type in the **Search** field to filter the list based on the HaloPSA customer names.



	HALOPSA customer	Status	Mapping	Acronis customer
<input type="checkbox"/>	test_customer_1	Active	Not mapped	—
<input type="checkbox"/>	test_customer_100	Active	Not mapped	—
<input type="checkbox"/>	test_customer_101	Active	Not mapped	—
<input type="checkbox"/>	test_customer_102	Active	Not mapped	—
<input type="checkbox"/>	test_customer_103	Active	Not mapped	—
<input type="checkbox"/>	test_customer_104	Active	Not mapped	—
<input type="checkbox"/>	test_customer_105	Active	Not mapped	—
<input type="checkbox"/>	test_customer_106	Active	Not mapped	—
<input type="checkbox"/>	test_customer_107	Active	Not mapped	—
<input type="checkbox"/>	test_customer_108	Active	Not mapped	—
<input type="checkbox"/>	test_customer_109	Active	Not mapped	—
<input type="checkbox"/>	test_customer_110	Active	Not mapped	—
<input type="checkbox"/>	test_customer_111	Active	Not mapped	—
<input type="checkbox"/>	test_customer_112	Active	Not mapped	—

4. [Optional] Click  **Filters** to refine the contents of the list by **Type**, **Status**, and/or **Mapping**.
5. Select the HaloPSA customer or customers you want to map.



	HALOPSA customer	Status	Mapping	Acronis customer
<input type="checkbox"/>	test_customer_1	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_100	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_101	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_102	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_103	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_104	Active	Not mapped	—
<input checked="" type="checkbox"/>	test_customer_105	Active	Not mapped	—
<input type="checkbox"/>	test_customer_106	Active	Not mapped	—
<input type="checkbox"/>	test_customer_107	Active	Not mapped	—
<input type="checkbox"/>	test_customer_108	Active	Not mapped	—
<input type="checkbox"/>	test_customer_109	Active	Not mapped	—
<input type="checkbox"/>	test_customer_110	Active	Not mapped	—
<input type="checkbox"/>	test_customer_111	Active	Not mapped	—
<input type="checkbox"/>	test_customer_112	Active	Not mapped	—

6. Click **Map to new customer tenant**.




7. [If you selected multiple customers] Verify the list of customers to provision and map, then click **Map customers**.

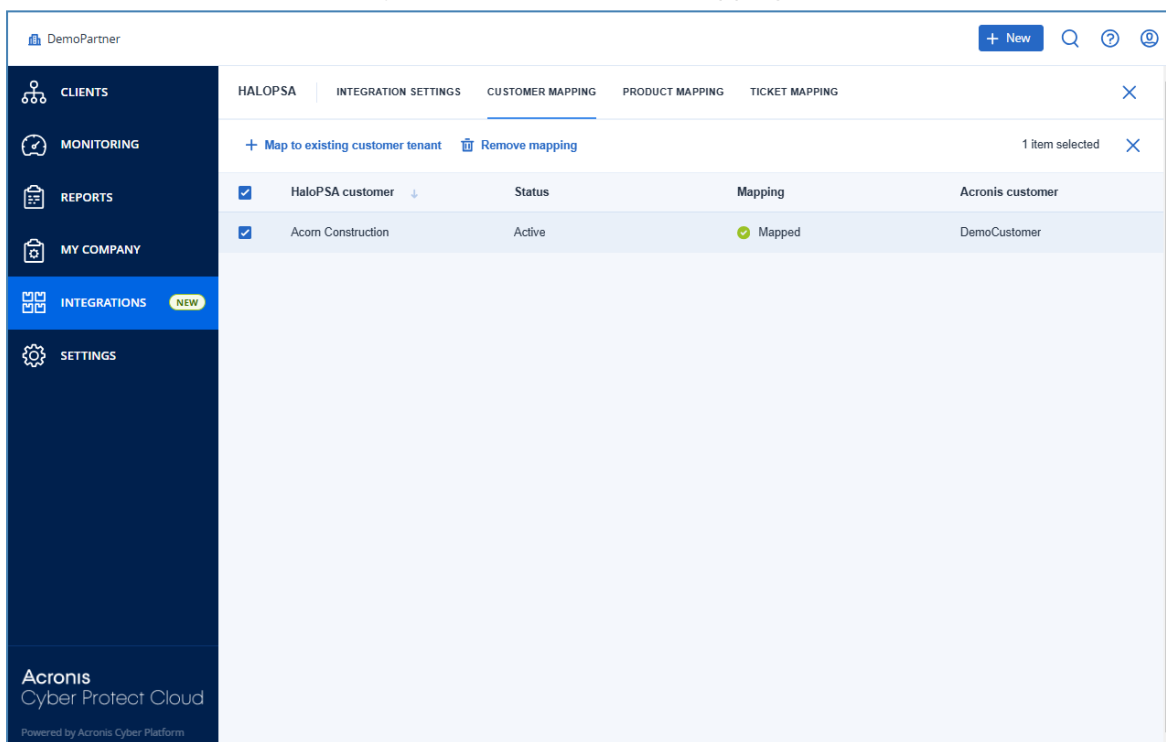
## Removing a customer mapping


### Note

The Acronis customer tenant and associated storage usage are unaffected, and HaloPSA tickets which have been created for unmapped customers are also unaffected.

### To remove a customer mapping

1. Open the integration.
2. Select the **CUSTOMER MAPPING** tab.
3. [Optional] Type in the **Search** field to filter the list.
4. [Optional] Click  **Filters** to filter the list.
5. Select the customers for which you want to remove the mapping.



6. Click  **Remove mapping**.
7. Click **Remove**.

# Tickets

When the ticket mapping feature is enabled, the integration will create a HaloPSA ticket if [an Acronis alert which is mapped to a HaloPSA ticket](#) occurs on a protected workload of [an Acronis customer which is mapped to a HaloPSA customer](#).

The integration can also:

- [Clear Acronis alerts automatically](#) when mapped HaloPSA tickets change to a predetermined status.
- [Close HaloPSA tickets automatically](#) when the mapped Acronis alert is cleared.  
The HaloPSA ticket is changed to a predetermined status, and a predetermined note can also be added to the HaloPSA ticket.
- [Reopen HaloPSA tickets](#) if the same Acronis alert is raised for the same protected device within a predetermined period of time.

## Mapping Acronis alerts to HaloPSA tickets

---

### Note

If multiple tickets that you want to map have the same or similar values for the ticket **Priority**, **Status**, **Type** and/or **Queue** fields, you can [configure ticket mapping defaults](#) to more efficiently map multiple tickets.

---

You can also [delete ticket mappings](#) while mapping Acronis alerts to HaloPSA tickets.

### ***To map Acronis alerts to HaloPSA tickets***

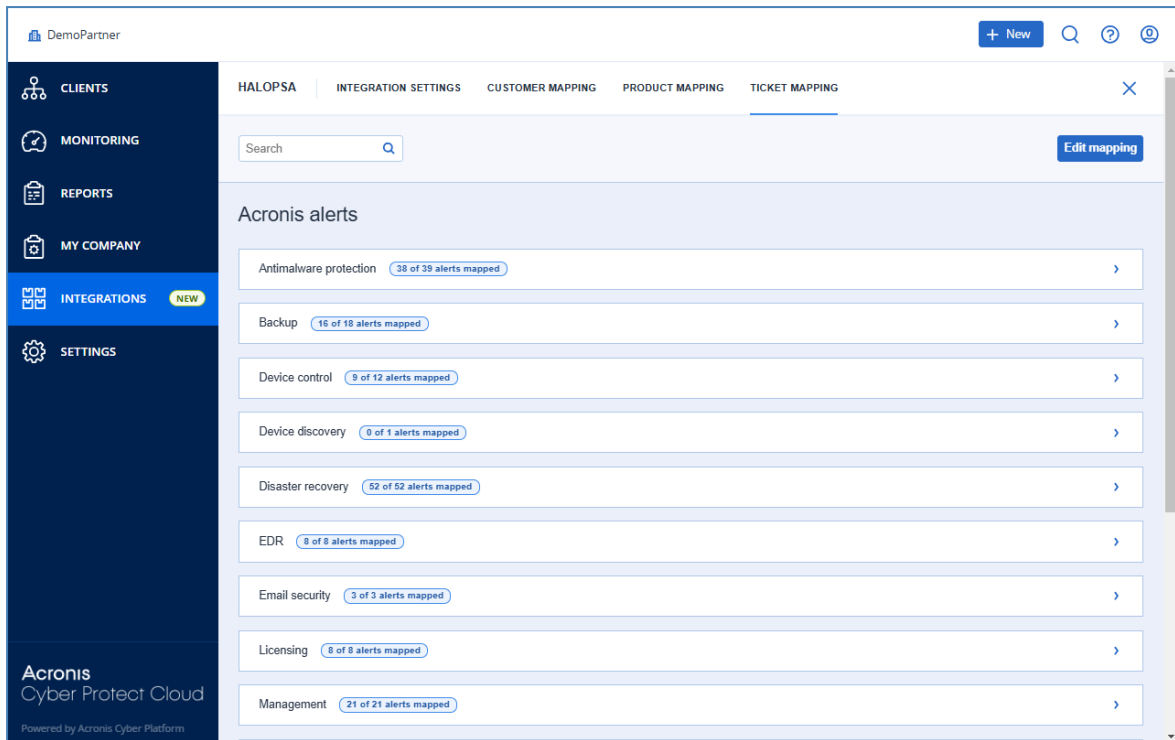
1. [Open the integration](#).
2. Select the **TICKET MAPPING** tab.
3. [If required] Click **Enable**.

---

### Note

You must have at least one ticket type in HaloPSA. Otherwise, an error will occur when you enable ticket mapping.

---



4. Click **Edit mapping**.
5. Locate the Acronis alerts you want to map, and select their checkboxes.

#### Note

The **TICKET MAPPING** tab groups Acronis alerts by the alert source (antimalware protection, backup, EDR, etc.). Each alert group displays a running total of how many alerts are mapped. You can filter the contents of the Acronis alert lists by typing a string in the **Search** field at the top of the page.

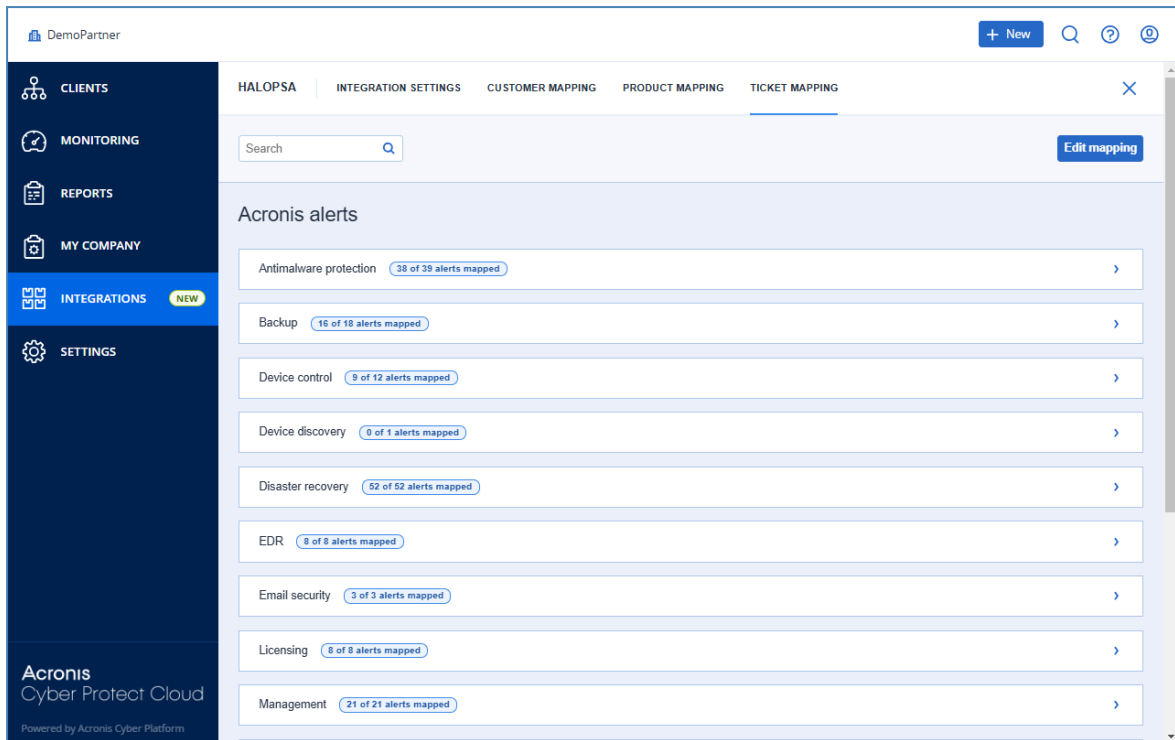
6. [Optional] Modify ticket field values, as required.

#### Note

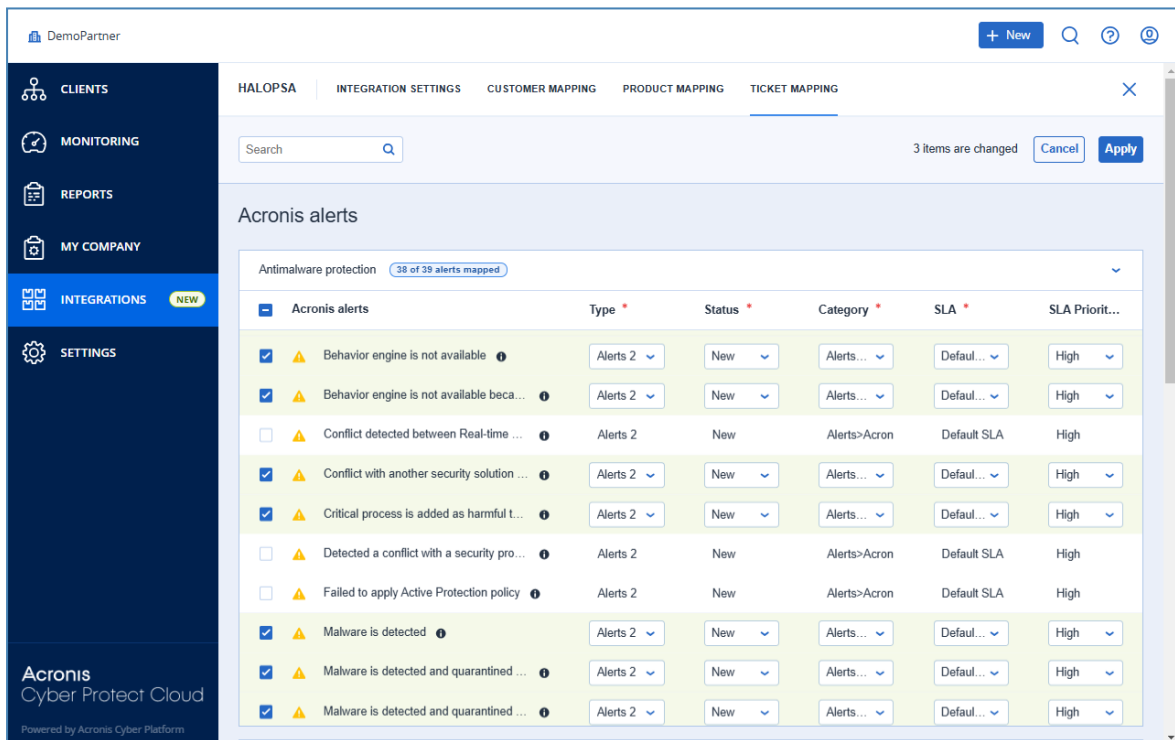
Initially, the values of the ticket **Priority**, **Status**, **Type** and **Queue** fields are set to the ticket mapping defaults specified in **INTEGRATION SETTINGS > Ticket mapping > Tickets**. If you haven't set a default, the ticket field will be null, and you must set the field manually.

7. [Optional] You can clear the checkboxes of previously mapped Acronis alerts to delete the mappings.





3. Click **Edit mapping**.
4. Locate the Acronis alerts for which you want to delete the mappings, and clear their checkboxes.



5. Click **Apply**.

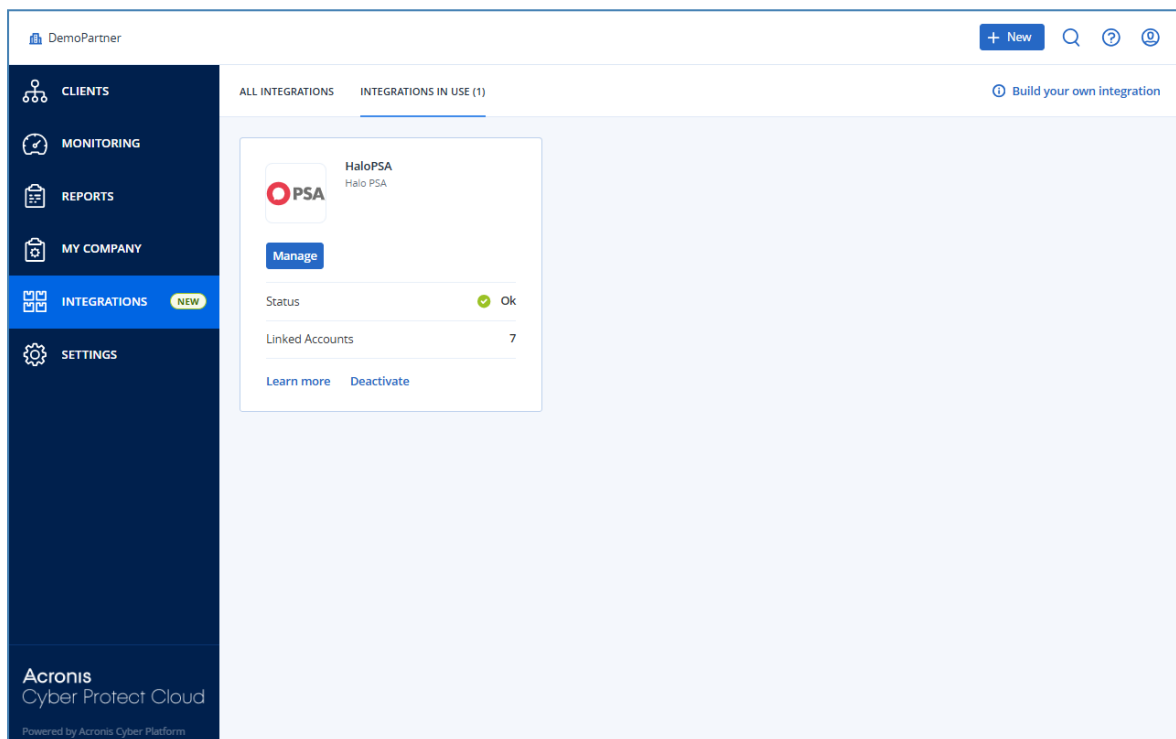
# Deactivating the integration

## *To deactivate the integration*

1. Log in to Acronis Management Portal as administrator.
2. Select **INTEGRATIONS** on the main menu.
3. Select the **INTEGRATION IN USE** tab.
4. Locate the HaloPSA integration catalog card.

### Note

For more information, see [the Management Portal partner administrator guide](#).



5. Click **Deactivate**.
6. Click **Delete**.

# Additional information

This chapter includes useful reference material and examples to assist in your use of the integration.

## Preventing the most common issues

### **Error messages**

All product mapping error messages are displayed in the **CUSTOMER MAPPING** tab.

### **Recurring invoices**

- Active recurring invoice means that it should have a valid start and end date.
- We recommend that all Acronis recurring items are in a single invoice for the HaloPSA customer. If the customer has more than one active recurring invoice, the integration will pick the latest one (with the most recent recurring invoice ID).
- The active recurring invoice should have at least one additional charge, representing recurring items mapped to Acronis offering item.

If these conditions are not fulfilled, [synchronization](#) generates an error, visible at the mapped customer level.

### **Editions**

You can only have items from one edition per customer: either **Per Gygabyte** or **Per Workload**. If you add mixed editions for a customer, the integration will throw a mapping error.

### **Storage**

You can only add one storage per customer.

## Quota and usage synchronization and billing

In the context of this integration, quota and usage synchronization is the process where:

- The offering items of an Acronis customer tenant are disabled/enabled/configured, depending on the additional charges of the recurring invoice the linked customer has in HaloPSA (quota synchronization part).
- The usage of certain offering items is updated in the recurring invoice of the linked customer in HaloPSA (usage synchronization part).

Simply put, quota and usage synchronization is the process where Acronis reads the HaloPSA recurring invoices, and based on their content, tries to provision/deprovision different services in Acronis Cyber Cloud.

To perform the above, the HaloPSA integration implements a complex algorithm involving:

- Acronis partner account used to activate the integration
- Mapped Acronis customer tenants of the partner above

- Acronis offering items mapped to HaloPSA recurring items
- Customer-defined HaloPSA recurring invoice
- HaloPSA recurring invoice configuration (status, validity dates, etc.)
- HaloPSA recurring invoice additional charges

Taking into account all these factors, the HaloPSA quota and usage synchronization is responsible for the following activities:

- Provision Acronis offering items for HaloPSA recurring items, sold on prepaid or pay-as-you-go (PAYG) basis.
- Provision Acronis offering items, not linked to HaloPSA recurring items.
- Deprovision Acronis offering items, which don't fall into any of the above two categories.
- Report actual usage of HaloPSA recurring items, sold on PAYG basis.
- Report overage usage of HaloPSA recurring items, sold on 'prepaid with allowed overage' basis.

When you enable the product mapping feature, you also automatically enable the quota and usage synchronization process.

## Reporting offering item usage to HaloPSA

The integration reports Acronis offering item usage to HaloPSA once a day, at 04:00 UTC.

During the process, the integration:

- Gets the list of the mapped Acronis customer tenants.
- [For each mapped Acronis customer tenant] Generates an offering item usage report.
- [For each mapped Acronis customer tenant] Scans for active prepaid and/or PAYG contracts.
- Updates the quantities in the PAYG contract as in this table:

Input 1: Offering item configuration in the integration		Input 2: Offering item stats			Result: service line update in HaloPSA	
Mapping Status	Free Provisioning	Quota	Overage	Usage	Contract Type	Quantity
Not mapped	Not relevant	Ignored	Ignored	Ignored	Not relevant	Not relevant
Mapped	Yes	Ignored	Ignored	Ignored	Not relevant	Not relevant
		Q (Hard)	0	Ignored	Not relevant	Not relevant



Input 1: Offering item configuration in the integration		Input 2: Offering item stats			Result: service line update in HaloPSA	
Mapping Status	Free Provisioning	Quota	Overage	Usage	Contract Type	Quantity
	No	Unlimited	Unlimited	U	PAYG	U
		Q (Soft)	Unlimited	U	PAYG	U - Q (warning) Only if usage is more than quota

#### Note

For more information on storage usage, see [the Storage chapter](#).

## Storage

You can account for the consumption of public cloud storage in several ways, depending on factors such as class1/class2 division, geo-redundancy option, and quota set.

In each of the scenarios included in the section, selecting any available options will automatically enable the backup storage, while deselecting all of them will disable it. You can also choose any combination of these options. This ensures that storage usage is regularly reported from Acronis to the HaloPSA contract.

### *Storage usage specifics*

- A customer can have only one storage.
- The default storage works by allowing you to provision storage and disaster recovery (DR) for free.
- Only default backup storage can be set as **Free** provisioning and enabled for all tenants.
- Changing the default backup storage location will deselect the current backup storage in the offering items list.

## Quota, class 1/class 2

### Add free and billed services to the contract (class1/class2)

The following options are displayed in a customer contract:

- **Quota, Overage and Total usage** - select this option to report the total amount of free and billed storage used.

- **Class 1 (free) usage reporting** - report free-of-charge type of usage only. Used primarily for backup storage for M365 offering items.
- **Class 2 (billed) usage reporting** - report the billed usage alone.

Offering items	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Backup storage		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Quota, Overage and Total usage	Acronis pw base storage XYZ	
<input checked="" type="checkbox"/> Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
<input checked="" type="checkbox"/> Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

### To add class 1 and class 2 in the contract

1. In HaloPSA, add the offering item that you want add to in the customer contract.
2. In AcronisCyber Cloud, go to the **Integrations** tab.
3. Click the **Billing** tab.
4. Click **Select service** to associate the backup storage to the service created in HaloPSA.
5. At the end of the billing cycle, the usage report generates the storage amount for class 1 and class 2 that will be added at the end of the month.

This is how customers will see class 1 and class 2 in their invoice:

Invoice									
Change History Notes Attachments									
Recurring Invoice									
Description	Quantity	Price	Net Amo...	Tax	Product ID for Acco...	Reviewed	Active	Bundled	
pw base workstations \$recurringbillingdate	20	1.00	0.00	0.00		N/A	Yes	No	<a href="#">Add reading</a> <a href="#">Reading history</a>
pw base vms \$recurringbillingdate	0	1.00	0.00	0.00		N/A	Yes	No	<a href="#">Add reading</a> <a href="#">Reading history</a>
pw base storage class1 (free) \$recurringbillingdate	65	1.00	0.00	0.00		N/A	Yes	No	<a href="#">Add reading</a> <a href="#">Reading history</a>
pw base storage class2 (billed) \$recurringbillingdate	55	1.00	0.00	0.00		N/A	Yes	No	<a href="#">Add reading</a> <a href="#">Reading history</a>
pw base total storage \$recurringbillingdate	121	1.00	0.00	0.00		N/A	Yes	No	<a href="#">Add reading</a> <a href="#">Reading history</a>

## Geo-redundancy

When geo-redundant storage is enabled, this creates one more storage location, where all the backups are stored. This ensures you that you have the backups in a different place.

### To add geo-redundancy

1. In the Acronis Management Console go to **Settings > System Settings > Geo-redundant cloud storage** to enable geo-redundancy for the customer tenant.
2. In the integration **PRODUCT MAPPING**, map all items: storage + seats (M365, Google, Workstations, VMs, etc).

---

**Note**

For more information, see [the Products chapter](#).

---

3. Add all items to the invoice in HaloPSA.

Geo-redundancy doesn't support quota.

If a contract or an agreement contains a product which is mapped to a geo-redundant item, then the integration expects this agreement/contract to have the product mapped to the respective parent offering item, including:

- a. Total storage
- b. Class 2 storage
- c. Microsoft 365 seats
- d. Google workspace seats

---


**Note**

Otherwise, the integration will generate a sync error.

Class 1 (free) storage is an exception: it is not affected by the presence of geo-redundancy.

---

If any of the storages have respective geo-replications, their consumption will be accounted for as well. The total consumption will be equal to the standard plus the geo-redundant storage usage.

 Offering items	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Backup Storage: XYZ-1		<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Quota, Overage and Total usage	Acronis pw base storage XYZ-1	
<input checked="" type="checkbox"/> Geo-redundancy	Acronis pw base storage gr XYZ-1	
<input checked="" type="checkbox"/> Class 1 (free) usage reporting	Acronis pw base storage XYZ-1 free	
<input checked="" type="checkbox"/> Class 2 (billed) usage reporting	Acronis pw base storage XYZ-1 billed	
<input checked="" type="checkbox"/> Geo-redundancy	Acronis pw base storage gr XYZ-1 billed	

## Public storages

The following types of external public cloud storages may be available and configured to be selected on customer level:

- Microsoft Azure
- Amazon S3
- S3 compatible

Public Cloud storage		
<input checked="" type="checkbox"/> Advanced Backup	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Microsoft Azure Cloud storage	Acronis pw base adv backup azure storage	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> Amazon S3 Cloud storage	Acronis pw base adv backup amazon storage	<input type="checkbox"/> Free
<input checked="" type="checkbox"/> S3 compatible Cloud storage	Acronis pw base adv backup S3 compatible storage	<input type="checkbox"/> Free

When public storage is enabled at the customer tenant level (not partner level), it requires customer authorization in the external cloud service. This means it is not possible to automatically provision this service to Acronis based on a HaloPSA contract.

The partner must manually undertake this process.

## Disaster recovery

To add Disaster Recovery, map **Disaster recovery** offering items and add backup storage for it.

### Note




Both offering items should be using the same storage location, otherwise you will get the mapping error 'Mapping failed. Backup and/or Disaster Recovery offering items are at different locations.'

In the HaloPSA recurring item, both offering items should be a part of the same recurring item, and it is obligatory for the Disaster Recovery offering item to have the **Is a meter** flag enabled.

If you don't want to bill for the Disaster Recovery item, map it as **Free** in the **Provisioning** column, and do not include in the HaloPSA recurring invoice.

Location: BackupWithDR		
<input checked="" type="checkbox"/> Offering item	HaloPSA product	Provisioning
<input checked="" type="checkbox"/> Standard Disaster Recovery		
<input checked="" type="checkbox"/> Disaster Recovery (Standard) (Fake_D...	Acronis pw base dr base Fake DR Storage	<input type="checkbox"/> Free
<input type="checkbox"/> Advanced Disaster Recovery		
<input type="checkbox"/> Disaster recovery storage (Advanced) (...)	Acronis pw base adv dr storage Fake DR Storage	
<input type="checkbox"/> Compute points (Advanced) (Fake_DR_...	Acronis pw base adv dr compute points Fake DR Storage	
<input type="checkbox"/> Public IP addresses (Advanced) (Fake_...	Acronis pw base adv dr public ips Fake DR Storage	
<input type="checkbox"/> Cloud servers (Advanced) (Fake_DR_St...	Acronis pw base adv dr cloud servers Fake DR Storage	
<input type="checkbox"/> Internet access (Advanced) (Fake_DR_...	Acronis pw base adv dr internet access Fake DR Storage	
<input checked="" type="checkbox"/> Backup storage (Fake_Backup_Storage)		
<input checked="" type="checkbox"/> Quota, Overage and Total usage (Fake_...	Acronis pw base storage Fake Backup Storage	
<input type="checkbox"/> Class 1 (free) usage reporting (Fake_Ba...	Acronis pw base storage Fake Backup Storage free	
<input type="checkbox"/> Class 2 (billed) usage reporting (Fake_B...	Acronis pw base storage Fake Backup Storage billed	

This is how the Disaster Recovery item will be provisioned in Acronis:

Location: BackupWithDR		
Backup storage		
Backup storage (Fake_Backup_Storage)		
	Backup storage	0 GB / Unlimited GB
Standard Disaster Recovery		
Standard Disaster Recovery (Fake_DR_Storage)		
	Disaster Recovery (Standard) 	Enabled

## Disabling offering items with existing usage

### **Preconditions**

As an MSP, you have an offering item in Acronis, and it is included in the recurring invoice in HaloPSA after customer mapping, and has generated usage in AcronisCyber Cloud.

### **Note**

When you remove the offering item from the recurring invoice in HaloPSA while the item is mapped in Acronis, the integration will generate an error in the **CUSTOMER MAPPING** tab. The error message 'The usages are being updated at the moment and their value might be more than zero' is displayed.

### **To remove offering items with existing usage**

1. Remove the offering item from the customer protection plan, so that its usage is reset to zero. Also, remove the corresponding recurring Item from the recurring invoice for this customer in HaloPSA.
2. At the end of the billing period in HaloPSA (you can set this up in the Recurring Invoice Schedule settings), the usage is reset to zero. After that, you can remove the item from the recurring invoice without receiving an error message.

## Switching the customer edition if it already has usage

### **Prerequisites**

- The offering item is part of invoice.
- Customer mapping is done.
- Customer provisioning is done.
- The offering item usage is assigned or is generated in Acronis.

### ***To switching the customer edition if it already has usage***

1. You must move the offering item from Edition **per workload** to **per gigabyte** while usage is generated for this offering inside of the HaloPSA integration.
2. You must remove the current mapping from the **Product mapping** page for this offering item and maps it again to the same one but for per gigabyte edition.

---

#### **Note**

After the customer provisioning sync (15 minutes), the integration raises an error on the **CUSTOMER MAPPING** tab: 'Cannot change the storage location ID of this offering item while switching editions.'

To resolve this error, ensure that the offering item is set to 0. To do this, remove the offering item from the protection plan, or make sure that the usage is zeroed out at the end of the billing period.

---

## Adding offering items from different editions for a customer

---

#### **Note**

You can only have one edition per customer. You either assign **Per Workload** or **Per Gygabite** for each customer.

---

If you attempt to add offering items from two editions for a single customer, you will receive the following error message in the **CUSTOMER MAPPING** tab: 'Cannot enable offering items from multiple editions simultaneously.'

To fix this error, decide which edition the customer tenant should use, then go to the recurring invoice and remove products mapped to offering items from other editions. Keep the item in the invoice mapped to the edition you want to provision.

## Enabling M365 offering items

### ***To enable M365 offering items***

1. Map the Microsoft 365 Seats offering item + the Microsoft 365 offering item you want to enable.
2. Map the storage where your Microsoft 365 items will be backed up.
3. Add all six offering items to the customer's HaloPSA recurring invoice:
  - Microsoft 365 Seats
  - Mailboxes
  - OneDrive
  - SharePoint Online
  - Teams
  - The storage area where customers' mailboxes will be backed up.

<input checked="" type="checkbox"/>	Microsoft 365 seats	Acronis pw base m365 seats	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Microsoft 365 shared seats	Acronis pw base secondary	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Mailboxes	Acronis pw base m365 mailb	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	OneDrive	Acronis pw base m365 onedi	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Microsoft 365 SharePoint Online	Acronis pw base m365 share	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Microsoft 365 Teams	Acronis pw base m365 teamt	<input type="checkbox"/> Free

### Example

SKU 1: M365 items that are backed up in the storage class 1, a geo-redundant storage class 1 is created and all of these items will be backed up in 2 places.

SKU 2: The backed up workloads are backed up in storage class 2, with geo-redundant enabled, a new storage is created so that you can have your workloads backed up in 2 places.

### Note

In HaloPSA, you have to add all these offering items in order to get these SKUs enabled and reported.

## Enabling Google Workspace offering items

Google Workspace Shared Drive is a separate offering item that only requires additional storage.

<input checked="" type="checkbox"/>	Google Workspace seats	Acronis pw base gworkspac	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Gmail (incl. Calendar, Contacts)	Acronis pw base google mai	<input type="checkbox"/> Free
<input checked="" type="checkbox"/>	Google Drive	Acronis pw base google driv	<input type="checkbox"/> Free

## Enabling EDR for your customers

### To enable EDR for your customers

1. In Acronis Management Portal, select **CLIENTS** from the main menu.
2. Under Cyber Cloud, select the **Protection** tab.
3. Click the relevant client to which you want to add the **Advanced Security + EDR** pack.
4. In the **Configure** tab, under the **Protection** section, ensure the **Advanced Security + EDR** checkbox is selected.
5. In the Cyber Cloud console, go to **Management > Protection** plans.
6. Select the relevant protection plan from the displayed list, and in the right sidebar, click Edit.

7. In the protection plan sidebar, enable the **Endpoint Detection and Response (EDR)** module by clicking the switch next to the module name.
8. In the displayed dialog, click **Enable**.

#### ***To enable EDR + MDR for your customers***

1. To enable MDR, it is necessary to ensure that EDR is enabled at the partner level, and the MDR application is configured in CyberApps.
2. To start using MDR, the following items must be present in the contract:
  - a. Advanced Security + EDR Workloads
  - b. Managed Detection and Response Workloads - Standard or Managed Detection and Response Workloads - Advanced

## Billing mode use cases

This chapter explains how to configure HaloPSA recurring invoices and how to set up different billing modes (Hard/Soft Quota, PAYG).

#### ***Prerequisites***

- HaloPSA customer is mapped to the Acronis customer tenant.
- The following mapping has been established between the HaloPSA recurring items and Acronis offering Items:

HaloPSA recurring item	Acronis offering item
Acronis pw base workstations	Workstation (Per Workload)
Acronis pw base storage	Storage (Per Workload)
Acronis pw base servers	Servers (Per Workload)

## Selling a PAYG service to the customer

1. In HaloPSA, on the **Recurring invoice** tab, click **Add Recurring Item** to start setting up a recurring item.
2. Select the **Active** checkbox to make the recurring item active.  
The status of the recurring item is displayed as active in the recurring invoice as well.



Schedule type

**Start date and Repeat Period**

Time  
This field is in the application timezone: GMT Standard Time

00:00

Start Date \*

Date

Repeat Period \*

Monthly

End Date  
Leave blank for no end date

Date

Number of days ahead of schedule to create

0

☒ Create on holidays

☒ Active

Last creation date

Date

3. Add the **Acronis pw base workstations**.

You can name this whatever you want in the **Description** field) recurring item to the invoice.

4. Enable the **Is a meter** flag to ensure that your customers will not pay a prepaid bundle, but only what they consume. This will display the **Add reading** and **Reading history** buttons next to the recurring item in the recurring invoice.

5. Select **Periodic reading** as the reading type in the **Meter Type** field.

Description \*

Acronis local storage (\$periodstartdate - \$periodenddate)

Long description

Acronis local storage

Group

Select...

☒ Is a meter

Meter Type

Periodic reading  
You can generate units for the test reading

Start reading

6. Go to the **Recurring invoice** tab to see the information for the PAYG service that you will sell to the customers:

Customers

nashat-halapsa-customer...

Recurring invoice

Recurring invoice (nashat-halapsa-customer-prepaid)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pw base workstations	1	50.00	20.00	0.00		Yes

Net Total: 20.00  
Tax: 0.00  
Gross Total: 20.00

Customer details

Schedule

Next creation date  
1/1/2020 00:00

Next creation period  
Net net

Active  
Yes

Create and store this many periods  
if read  
When read to use the given setting

Chk Date

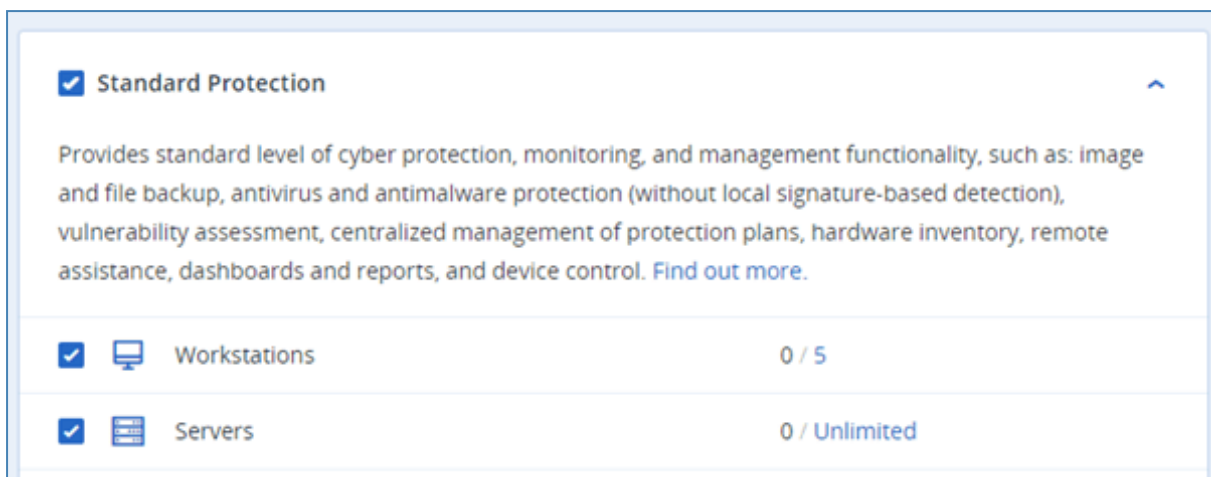
Date

0

Day(s) after the invoice date

7. Open Acronis Cyber Cloud and see that the integration detects the invoice line.

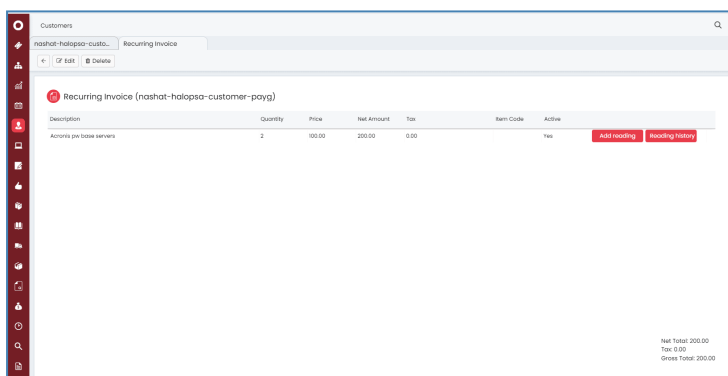
8. The quota for the mapped Acronis customer tenant is set to unlimited.



## Note

The quantity in the recurring invoice is updated by the integration with the actual usage during synchronization.

If at the end of the billing cycle, you as an MSP reported 2 protected server workloads out of 5, the recurring invoice is updated so that the customer can see that he was billed only for the workloads in use:



## Selling a PREPAID service to the customer

**(Hard quota with no expected overage)**

### To set up a sale of 5 prepaid protected slots for workstation protection

1. In HaloPSA, on the **Recurring invoice** tab, click **Add Recurring Item** to start setting up a recurring item.
2. Select the **Active** checkbox to make the recurring item active.  
The status of the recurring item is displayed as active in the recurring invoice as well.
3. Add **Acronis pw base workstations** recurring item to the invoice.
4. As an MSP, you set the required quantity to indicate that this is a PREPAID service.

Schedule type

**Start date and Repeat Period**

Time  
This field is in the application timezone: GMT Standard Time

00:00

Start Date \*

Date

Repeat Period \*

Monthly

End Date  
Leave blank for no end date

Date

Number of days ahead of schedule to create

0

☒ Create on holidays

☒ Active

Last creation date

Date

5. Select the **Recurring invoice** tab to see the information for the prepaid service that you will sell to the customers.

Customers

nashat-halospa-customer...

Recurring Invoice

Recurring Invoice (nashat-halospa-customer-prepaid)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pre-paid maintenance	1	50.00	250.00	0.00		Yes

add recurring item add product add generic product

Stop Cancel

Customer details

Schedule

Next creation date  
1/1/2022 00:00

Next creation period  
Monthly

Active  
Yes

Create invoices for many periods ahead  
How many periods ahead to use the general setting

Due Date

Due  
0

Only after the invoice date

Net Total: 250.00  
Tax: 0.00  
Gross Total: 250.00

6. Open Acronis Cyber Cloud and make sure that the integration detects the invoice line.
7. Set the offering item quota to 5, with overage = 0 for the customer tenant mapped in Acronis.

Per workload

☒ **Standard Protection**

Provides standard level of cyber protection, monitoring, and management functionality, such as: image and file backup, antivirus and antimalware protection (without local signature-based detection), vulnerability assessment, centralized management of protection plans, hardware inventory, remote assistance, dashboards and reports, and device control. [Find out more.](#)

<input checked="" type="checkbox"/>	Workstations	0 / 5
<input type="checkbox"/>	Servers	
<input checked="" type="checkbox"/>	Virtual machines	
<input type="checkbox"/>	Web hosting servers	
<input type="checkbox"/>	Mobile devices	
<input type="checkbox"/>	Microsoft 365 seats	
<input type="checkbox"/>	Microsoft 365 SharePoint Online	

Quota edit

Quota  
5

Overage  
0

Done

## Note

If, at the end of the billing cycle, no quota is exceeded, the customer will be billed for the 5 prepaid protected slots on the HaloPSA side. The integration reports past usage or sets the current quota. Since usage always occurs in the past and quotas can be changed until the moment of billing, we do not support billing in advance in this integration.

## Selling a PREPAID service to the customer with expected coverage

### (Soft quota)

## Note

This example also shows what happens when the customer buys 50 GB of storage space, and he expects this number to increase at some point due to the higher demand.

1. On the **Recurring invoice** tab, click the **Add Recurring Item** button to start setting up a recurring item.
2. Check the **Active** box to make the recurring item active. The status of the recurring item will be displayed as active in the recurring invoice as well.
3. Add another **Acronis pw base storage** recurring item to the invoice, check **Is a meter field** to indicate that this is a PAYG line.

Recurring invoice (nashat-halopsa-customer-prepaid)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pw base storage	70	10.00	700.00	0.00		Yes
Acronis pw base storage	0	10.00	0.00	0.00		Yes

[Add reading](#) [Reading history](#)

4. During Acronis quota synchronization, the integration detects this recurring invoice line configuration.

- It will set the Offering Item quota to 50, with overage = unlimited for the mapped Acronis customer tenant.

In Acronis Cyber Cloud, the storage space above the set quota is displayed in the **Backup storage** field.

At the end of the billing cycle, the recurring invoice displays, in the second recurring item row, the storage space above the set quota.

Recurring Invoice (nashat-halopsa-customer-prepaid)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pre base storage	70	10.00	700.00	0.00		Yes
Acronis pre base storage	9	10.00	0.00	0.00		Yes

[Add recurring](#) [Recurring history](#)

## Selling mixed scenarios

This use case illustrates when a customer wants 5 prepaid workstations slots, pay-as-you-go VM protection, and 5GB of backup storage with the overage option.

To set up a sale for combined services for 2 recurring invoices, in HaloPSA:

1. On the **Recurring invoice** tab, click the **Add Recurring Item** button to start setting up a recurring item.
2. Check the **Active** box to make the recurring item active. The status of the recurring item will be displayed as active in the recurring invoice as well.
3. Add a new recurring item. As an example, use the Acronis pw base VMs to be used as the name of the recurring item in the **Description** field and then enable the **Is a meter** flag to indicate that this is a PAYG line.
4. Add **Acronis pw base storage** recurring item to the invoice and set the quantity to 50 to indicate that this is a PREPAID line.
5. Add **Acronis pw base storage** recurring item to the invoice and enable the **Is a meter** flag to indicate that this is a PAYG line.

Then, in Acronis Cyber Cloud, the integration detects this recurring invoice lines configuration. It will configure customer Offering Items as follows:

- Enable workstations' OIs with quota = 5 and overage = 0
- Enable VMs' OIs with quota = unlimited
- Enable storage OIs with quota = 5 and overage = unlimited

## Offering item provision/deprovision and quota configuration

This process is triggered every 15 minutes. During this period, the integration:

1. Gets the list of the mapped Acronis customer tenants.
2. [For each mapped Acronis customer tenant] Scans for active recurring invoices.
3. Compares the recurring items, listed as additional charges to the mapped offering items.

The results after offering item provision/deprovision/configuration is done as in the following table.

	Input 1: Offering item configuration in the integration		Input 2: Mapped recurring items in HaloPSA recurring invoice			Result: offering item configuration in Acronis Cyber Cloud	
Example	Mapping status	Free provisioning	Included in recurring invoice	Additional charge	Billing mode	Status	Quota
1	Not mapped	Not relevant	Not relevant	Not relevant	Not relevant	Disabled	Not relevant
2	Mapped	Yes	No	Not relevant	Not relevant	Enabled	Unlimited
3		Yes	Yes	Not	Is	Enabled	Unlimited

	Input 1: Offering item configuration in the integration		Input 2: Mapped recurring items in HaloPSA recurring invoice			Result: offering item configuration in Acronis Cyber Cloud	
Example	Mapping status	Free provisioning	Included in recurring invoice	Additional charge	Billing mode	Status	Quota
	Mapped			relevant	Metered (PAYG)		
4	Mapped	Yes	Yes	Not relevant	Quota (PREPAID)	Enabled	Same as HaloPSA Recurring Invoice
5	Mapped	No	No	Not relevant	Not relevant	Disabled	Not relevant
6	Mapped	No	Yes	PREPAID	Q	Enabled	Hard quota Q
7	Mapped	No	Yes	PAYG	o	Enabled	Unlimited
8	Mapped	No	Yes	PREPAID and PAYG	Q / 0	Enabled	Soft quota Q

## Example explanations

### Example 1

If there are no mapped products mapped, but there are Acronis Recurring Items part of the HaloPSA invoice and an Acronis customer tenant is mapped to a HaloPSA Customer, then:

1. There are no products provisioned in Acronis Cyber Cloud.
2. There is no usage reported in HaloPSA.
3. The integration returns a **No product to sync** error on the mapping pair in the **CUSTOMER MAPPING** tab.

### Example 2

If an offering item in Acronis is marked as **Free** in the product mapping **Provisioning** column, and the same product is not part of the HaloPSA recurring invoice then, after customer provisioning, the quota for this item will be set to unlimited in Acronis Cyber Cloud.

When you create a recurring invoice, make sure to either not include the offering item that you want the customer to have for free or put it as 0 cost item.

### **Example 3**

If an offering item in Acronis is marked as **Free** in **PRODUCT MAPPING**, and the same product is a part of the HaloPSA recurring invoice with **Is metered** tag, then the quota for this item will be set to unlimited in Acronis Cyber Cloud after customer provisioning.

### **Example 4**

If an offering item in Acronis is marked as **Free**, and the same item is part of the HaloPSA recurring invoice with added quota then, after customer provisioning, the quota for this item in Acronis will be set to the same number as in the HaloPSA recurring invoice, and the item will be billed.

### **Example 5**

When you have an offering item mapped in Acronis product mapping, and the same product is in the HaloPSA recurring invoice. To enable **quota with overage**.

1. Add this product to HaloPSA as prepaid (100 units).
2. Add the same product in HaloPSA as **is metered**.
3. After customer provisioning, the integration starts counting the PREPAID (hard quota) items first.
4. The customer will be provisioned with Prepaid with Overage (soft quota) in Acronis where the prepaid amount is marked as 100, and PAYG (pay as you go) is marked as unlimited.

### **Example 6**

When the Offering Items are mapped, but they are not part of a HaloPSA recurring invoice and an Acronis customer tenant is mapped to a HaloPSA customer, then:

1. No products are provisioned in Acronis Cyber Cloud.
2. There is no usage reported in HaloPSA.
3. The integration returns **No product to sync error** on the mapping pair.

### **Example 7**

Offering Item is mapped in Acronis.

1. Offering Item is part of HaloPSA invoice and has configured units in the recurring invoice.
2. After customer provisioning is done, the quota will be updated according to HaloPSA invoice.

### **Example 8**

Offering Item is mapped in Acronis.

1. Offering Item is part of HaloPSA recurring invoice and is marked as **is metered** in the recurring invoice.
2. After customer provisioning is done, the quota is set to unlimited in Acronis.



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