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Acronis Cyber Cloud

Integration with HaloPSA

Quick Start Guide

REVISION: 8/7/2023

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Introduction

This document describes how to enable and configure the integration of Acronis Cyber Cloud with HaloPSA.

Once setup, the integration enables the following actions:

- Linking HaloPSA customers to Acronis customer tenants
- Linking HaloPSA recurring items to Acronis offering items
- Provisioning/deprovisioning of Acronis offering items, based on HaloPSA recurring invoices
- Configuring offering items, based on additional charges configuration of HaloPSA recurring invoices (supported modes: prepaid, pay-as-you-go and prepaid with overage)
- Reporting offering items' usage to HaloPSA recurring invoices
- Getting tickets in HaloPSA, based on alerts from Acronis
- Configuring automatic ticket resolution and reopening in HaloPSA
- Configuring automatic alert clearing in Acronis
- Automatic provisioning/deprovisioning of Acronis customer tenants

Prerequisites

To use this integration, you should have:

- A setup and configured HaloPSA instance
- An account in HaloPSA
- An already setup Acronis Cyber Cloud partner account

The Acronis account should have at least a single customer tenant, created along with an admin user.

The Acronis integration can work with:

- HaloPSA 2.98.6 or higher
- Acronis Cyber Cloud 22.11 or higher

Only customer tenants that are not in Self-service mode or don't have Support Access disabled, can be managed by the integration.

Setting up the integration

Before setting up an integration on Acronis side, make sure that you have a HaloPSA user account. During the setup, the Acronis integration will ask you to provide API credentials.

The Acronis integration with HaloPSA uses REST APIs of HaloPSA, so you must specify both sets of connection parameters on the setup screen.

Software requirements

Basic software requirements for integration setup:

- HaloPSA 2.98.6 or later
- Acronis Cyber Cloud platform version: 22.11 or later

How to set up integration in Acronis

To set up a connection with HaloPSA, you must provide the corresponding API connection parameters.

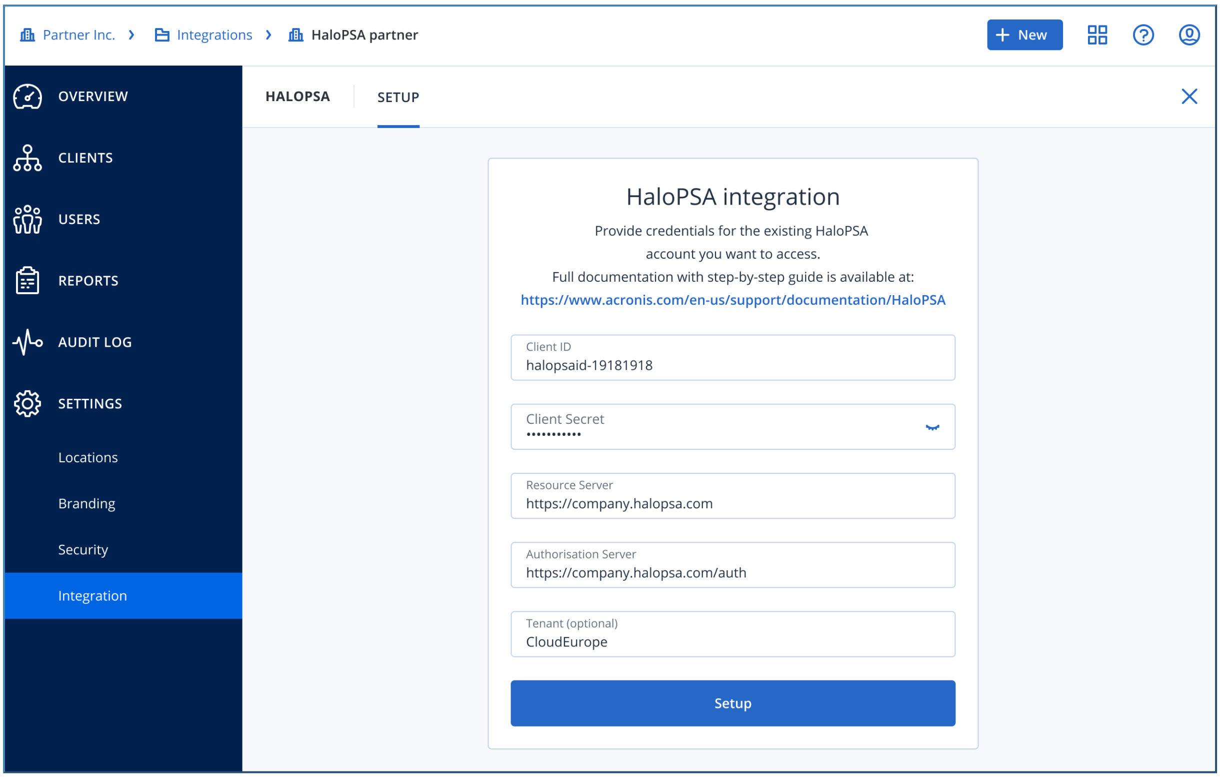
This particular integration uses REST APIs of HaloPSA, so you must specify both sets of connection parameters on the setup screen.

These parameters are used by the Acronis integration to access HaloPSA and to set up and synchronize integration data (accounts, recurring items, recurring invoices, offering items' quota, usage and overage) between your customer tenants and HaloPSA.

Depending on the type of access, specify the following:

REST API	Client ID
	Client Secret
	Private key
	Resource Server
	Authorization Server
	Tenant (optional)

The HaloPSA administrator should be able to provide those parameters. Alternatively, use the next sections to enable both APIs on HaloPSA side.



HaloPSA integration

Provide credentials for the existing HaloPSA account you want to access.
Full documentation with step-by-step guide is available at:
https://www.acronis.com/en-us/support/documentation/HaloPSA

Client ID: halopsaid-19181918

Client Secret: •••••••••••

Resource Server: https://company.halopsa.com

Authorisation Server: https://company.halopsa.com/auth

Tenant (optional): CloudEurope

Setup

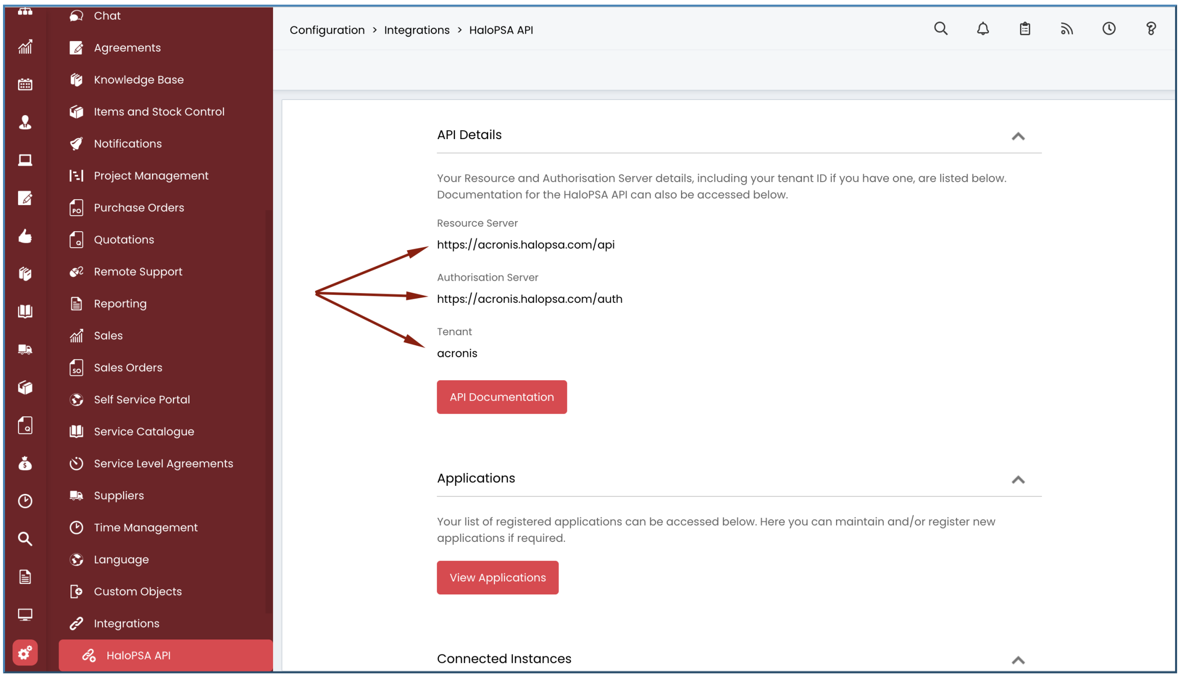
API parameters setup in HaloPSA

Application configuration

This section describes how to obtain the public and private keys for the REST API. These keys are displayed on the HaloPSA rep properties screen. Rep records identify users in HaloPSA. You can either create a new API rep or select an existing one for your integration.

To obtain the keys, do the following:

1. Log into your HaloPSA instance.
2. Navigate to **Configuration** > **Integrations** > **HaloPSA API**.
3. Make sure to write down your **Resource Server**, **Authorization Server** and **Tenant** for later usage.



API Details

Your Resource and Authorisation Server details, including your tenant ID if you have one, are listed below. Documentation for the HaloPSA API can also be accessed below.

Resource Server
https://acronis.halopsa.com/api

Authorisation Server
https://acronis.halopsa.com/auth

Tenant
acronis

Applications

Your list of registered applications can be accessed below. Here you can maintain and/or register new applications if required.

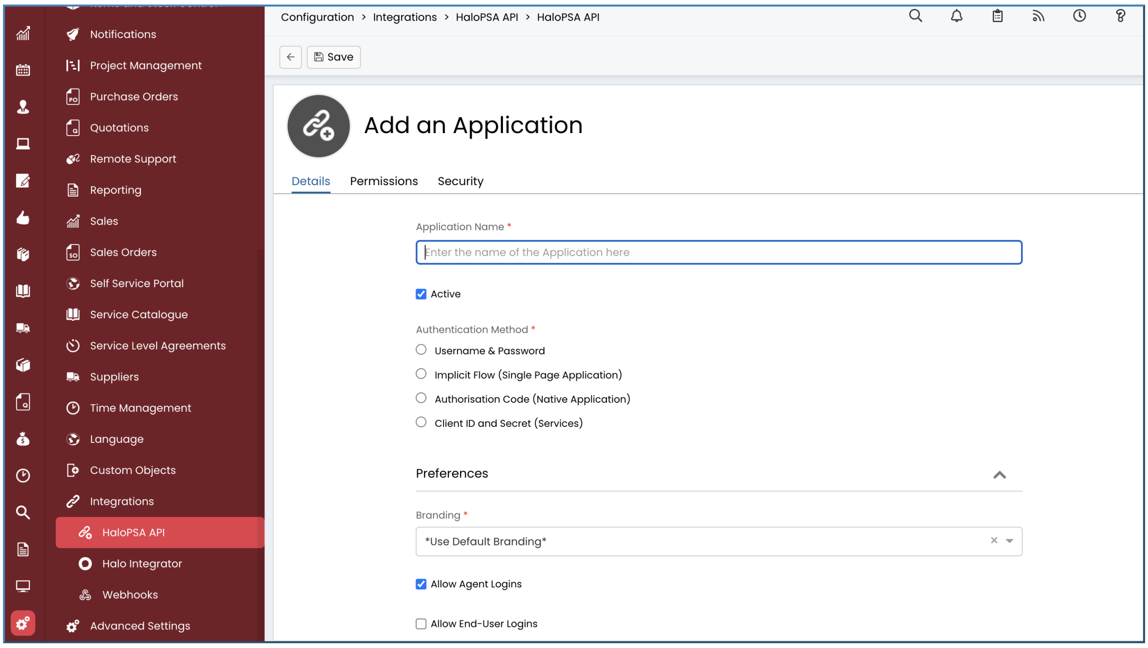
Connected Instances

4. Under the **Applications** menu, select **View Applications**.
5. Click the **New** button at the top right.
6. Complete the following configuration options to generate an appropriate API key:
   - For **Application Name**, enter one of your preference; recommended option: **Client Portal**.
   - Make sure that the **Active** checkbox is selected.
   - For **Authorization Method**, select **Client ID and Secret (Services)**.
   - For **Login Type**, select **Agent**.

Note

It is very important to select an Agent first, as it will change your Secret.

- For **Agent to log in as**, select a system admin within your HaloPSA instance.



Add an Application

Application Name *

Enter the name of the Application here

☑ Active

Authentication Method *

○ Username & Password
○ Implicit Flow (Single Page Application)
○ Authorisation Code (Native Application)
○ Client ID and Secret (Services)

Preferences

Branding *

Use Default Branding

☑ Allow Agent Logins

☐ Allow End-User Logins

7. Next, navigate to the **Permissions** tab at the top.
8. Select the first option for **All**.
9. Copy your Client ID and Client Secret keys. They will not be visible from this moment on.
10. Click **Save** to keep your changes.
11. At this point, you should have your **Tenant, Client ID** and **Client Secret** copied down. Make sure to keep a record of the public and private keys or copy them to the clipboard. You will have to specify these keys when you configure integration with HaloPSA. Next, those values will be passed to Acronis Cyber Cloud.

How to set up integration with HaloPSA

1. Log in to the Acronis Cyber Cloud Management portal.
2. Go to **Settings** > **Integration** > **HaloPSA**.
3. Provide HaloPSA API details as explained in the previous section.
4. Click **Save**.

As a result, you should have configured the integration between Acronis Cyber Cloud and HaloPSA.

After the integration is setup successfully, the following major sections will become visible and accessible:

Integration Settings

Provides all configuration options for the integration:

- Enable/disable the product mapping feature
- Enable/disable the ticket creation feature
- Configure the way customer tenants are provisioned/deprovisioned in Acronis
- Configure the offering item quota and usage synchronization parameters
- Configure the synchronization between Acronis alerts and HaloPSA tickets

Product Mapping
Provides functionality to map Acronis offering items to HaloPSA new or existing recurring items.

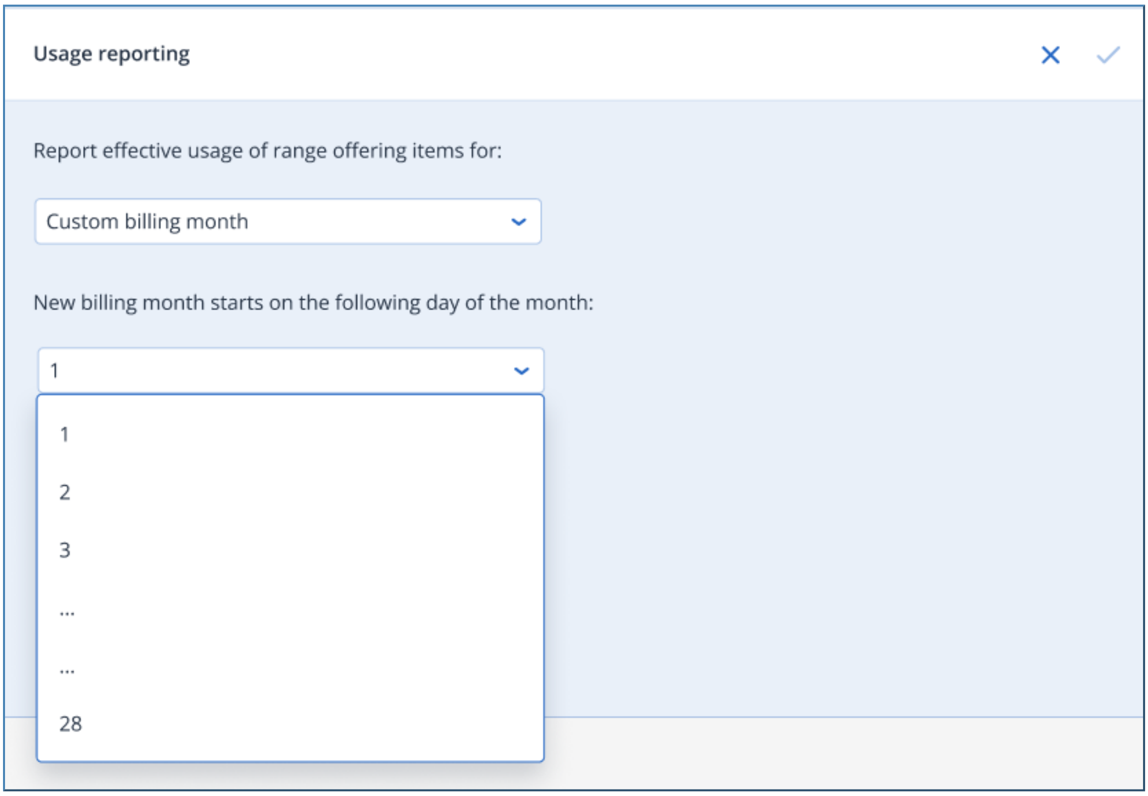
Customer Mapping
Provides functionality to map HaloPSA customer accounts to new or existing Acronis customer tenants.

Ticket Creation
Provides functionality that configures which alerts, raised in Acronis, to have corresponding tickets, created in HaloPSA.

Configure usage reporting

For ***range* offering items**, you can configure usage reporting *period* in the following way:

1. Click the pencil icon in the **Usage reporting** section top-right corner.
2. In the window that opens next, select reporting period from the **Report effective usage of range offering items for** drop-down list. The following choices are available:
   - **current calendar month** - usage will be reported for the present month on a daily basis
   - **previous calendar month** - usage will be reported for the past month on a daily basis
   - **custom billing month** - default option. You should also specify a date in the range from 1 (default selection) to 28 from the **New billing month starts on the following day of the month** drop-down.



Usage reporting

Report effective usage of range offering items for:

Custom billing month

New billing month starts on the following day of the month:

1

In this case, the integration will report the effective usage only once per month - on the day selected from the list. The reporting period will be 1 month back before the configured day.

Configuring the integration

Mapping HaloPSA customers

The **Customer mapping** tab displays the mapping between the HaloPSA accounts and the Acronis customer tenants. It lists all accounts that can be currently found in the integration. For every such account, the table displays:

- HaloPSA account name
- HaloPSA status (Active/Inactive)
- Mapping status
- Name of the Acronis customer tenant for those accounts that are currently linked

The mapping status can have one of the following values:

- **Not mapped** indicates that the current HaloPSA account is not linked to Acronis.
- **Mapped** indicates that the current HaloPSA account is linked to the Acronis customer tenant, displayed in the next column.
- **Mapping error** means that an error occurred with the existing 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 already addressed.

Use the **Search** box to quickly find HaloPSA accounts by their name or part of it. The **Filter** button can be also used to sort and refine the mapping list content.

There are two ways to map HaloPSA accounts to Acronis customer tenants:

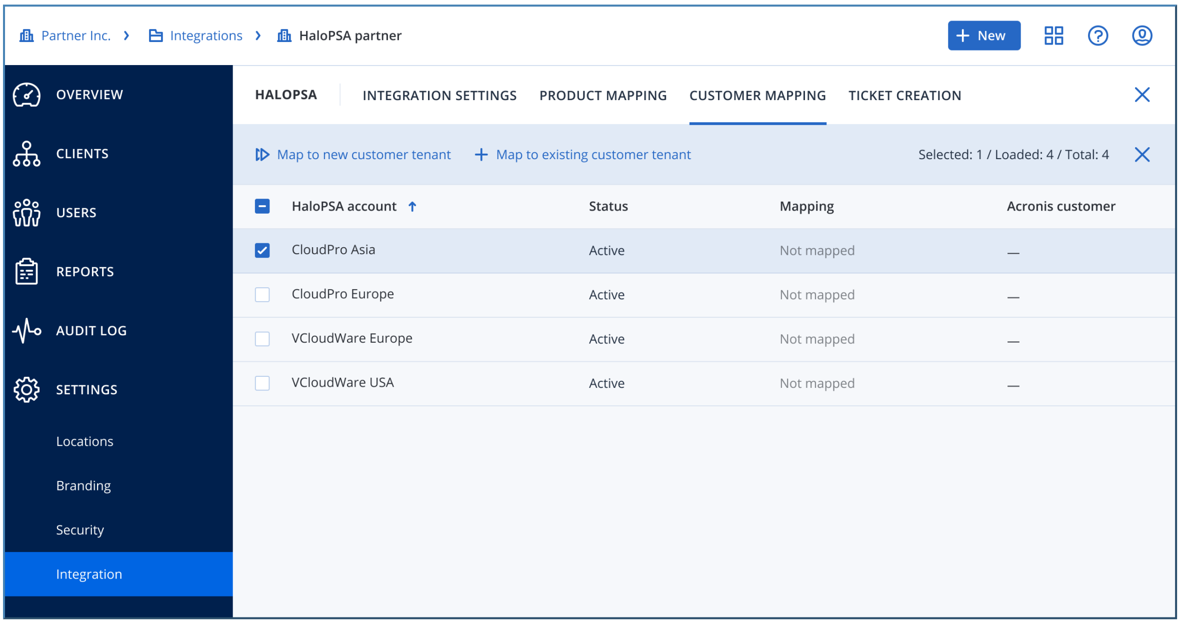
- Map the HaloPSA account to existing Acronis customer tenants, already created under the current partner account. Each Acronis customer tenant can be mapped only to a single HaloPSA account.
- If an Acronis customer tenant, suitable for mapping to a HaloPSA account, is missing, then you can create a new one and map it automatically.

Mapped customers can be always unlinked. HaloPSA tickets, already created for the unlinked account, will not be affected.

Map to existing Acronis customer tenants

To link a HaloPSA account to an existing Acronis customer tenant, do the following:

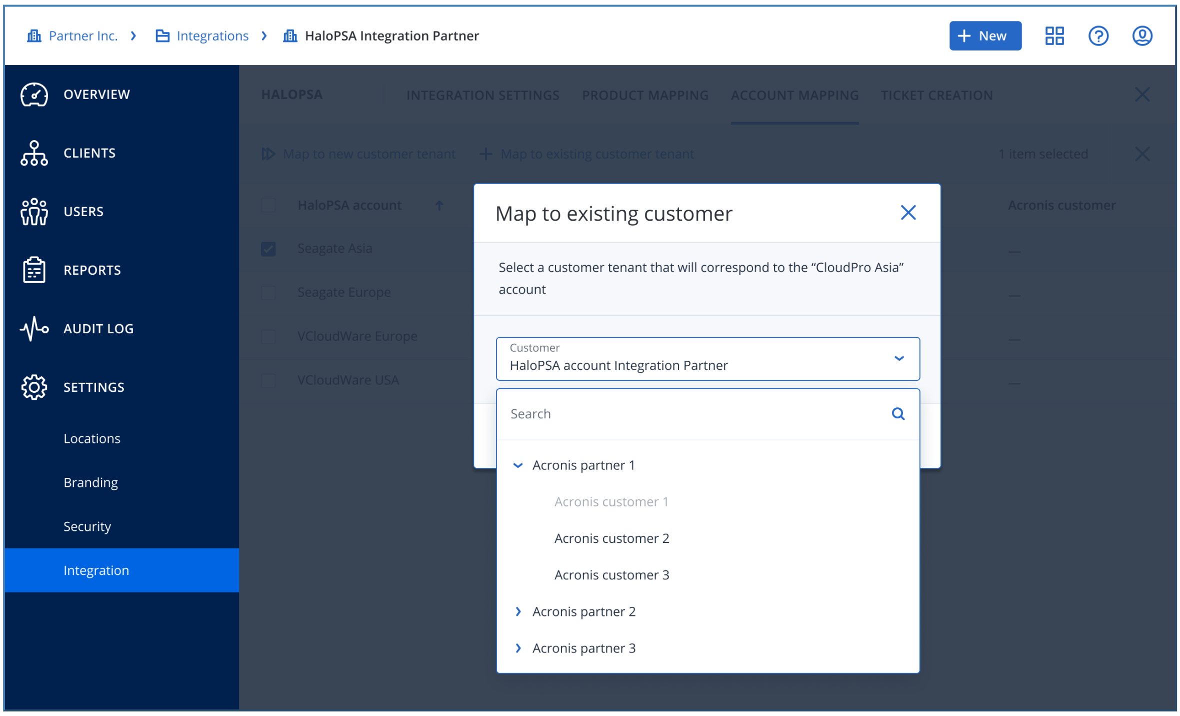
1. Go to the **Customer mapping** tab.
2. Locate and select the row with the HaloPSA customer you want to link.



Selected: 1 / Loaded: 4 / Total: 4

	HaloPSA account ↑	Status	Mapping	Acronis customer
☑	CloudPro Asia	Active	Not mapped	—
□	CloudPro Europe	Active	Not mapped	—
□	VCloudWare Europe	Active	Not mapped	—
□	VCloudWare USA	Active	Not mapped	—

3. Click the **Map to existing customer tenant** button in the action bar.
4. In the window that opens next, select the Acronis customer tenant you want to link.



Map to existing customer

Select a customer tenant that will correspond to the "CloudPro Asia" account

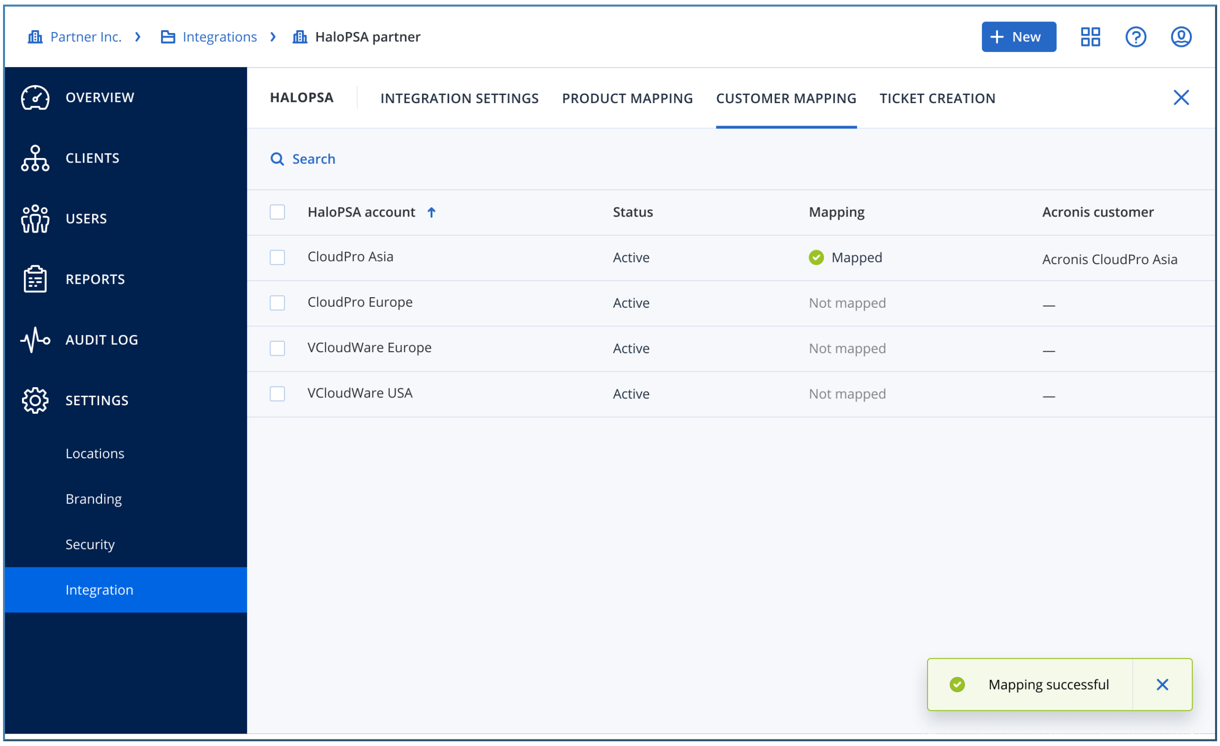
Customer: HaloPSA account Integration Partner

Search

- Acronis partner 1
  - Acronis customer 1
  - Acronis customer 2
  - Acronis customer 3
- Acronis partner 2
- Acronis partner 3

5. Click **Map**.

The mapping will be applied and its status changed to **Mapped**. The **Acronis customer** column will display the name of the linked Acronis customer tenant.



□	HaloPSA account ↑	Status	Mapping	Acronis customer
□	CloudPro Asia	Active	✓ Mapped	Acronis CloudPro Asia
□	CloudPro Europe	Active	Not mapped	—
□	VCloudWare Europe	Active	Not mapped	—
□	VCloudWare USA	Active	Not mapped	—

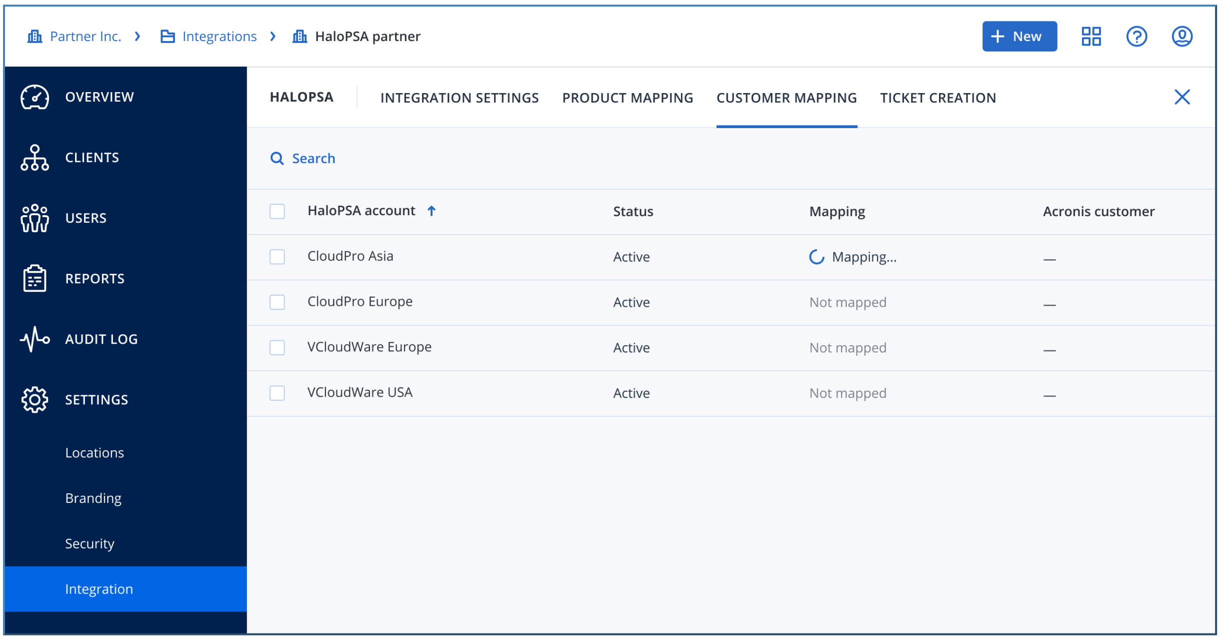
✓ Mapping successful

Provision new Acronis customer tenants

To link a HaloPSA customer to a new Acronis customer tenant:

1. Go to the **Customer mapping** tab.
2. Locate and select the row with the HaloPSA customer you want to link.
3. Click the **Map to new customer tenant** button in the action bar.

The integration will display a ***Mapping in progress*** message with a loading indicator. A request to create a new customer tenant will be issued to the Acronis Cyber Cloud platform. When this operation is completed, the list will be refreshed to show the current mapping status as well as the linked customer tenant.



	HaloPSA account ↑	Status	Mapping	Acronis customer
□	CloudPro Asia	Active	Mapping...	—
□	CloudPro Europe	Active	Not mapped	—
□	VCloudWare Europe	Active	Not mapped	—
□	VCloudWare USA	Active	Not mapped	—

There are different options to create new Acronis customer tenants, explained in the next chapter.

Configuration options for provisioning new Acronis customer tenants

To configure the way administrator accounts of Acronis customer tenants are created:

1. To change options, go to **Integration Settings** tab > **Customer Provisioning** section.
2. The following choices are available:
   a. **New customer tenant mode** can have one of two possible values:
      i. **Production** (default)
      ii. **Trial**
   b. **Create accounts based on** can have one of two possible values:
      i. **Company primary contact** (default)
      ii. **Company name**
   c. **Activation email** is visible only when accounts are created based on the company name (option b.ii above).
   d. **Two-factor authentication** is disabled by default.

Depending on the combination of the above options, when a new customer tenant is created in Acronis, the associated administrator account (login) can be created in any of the below-listed different ways:

1. If the **Create accounts based on** option is set to **Company primary contact**, then the created account will have details, extracted from the primary contact of the mapped HaloPSA customer as follows:
   a. User login is set to the HaloPSA account's contact first+last name
   b. User email is set to HaloPSA account's contact email
   c. First name is set to HaloPSA account's contact first name
   d. Last name is set to HaloPSA account's contact last name
2. If the **Create accounts based on** option is set to **Company name**, then the created account will have details as follows:
   a. User login is set to the company name
   b. User email is set to the Activation email value
   c. First and last name are left empty
      The account password will be defined by the user after responding to the activation email sent by Acronis.
3. If **Two-factor authentication** is **ON**, then the new tenant will have 2FA enabled, otherwise it will be disabled.

Mapping HaloPSA recurring items to Acronis offering items

Enabling the Product Mapping feature

By default, this feature is disabled after HaloPSA installation. To enable it:

1. Go to the **Integration settings** tab > **Features** section.
2. Locate the **Product mapping** feature switch button and turn it on.

Edit mapping between HaloPSA recurring items and Acronis offering items

Product mapping wizard

Use the **Product mapping** wizard to configure which Acronis offering items to map to HaloPSA PBIs.

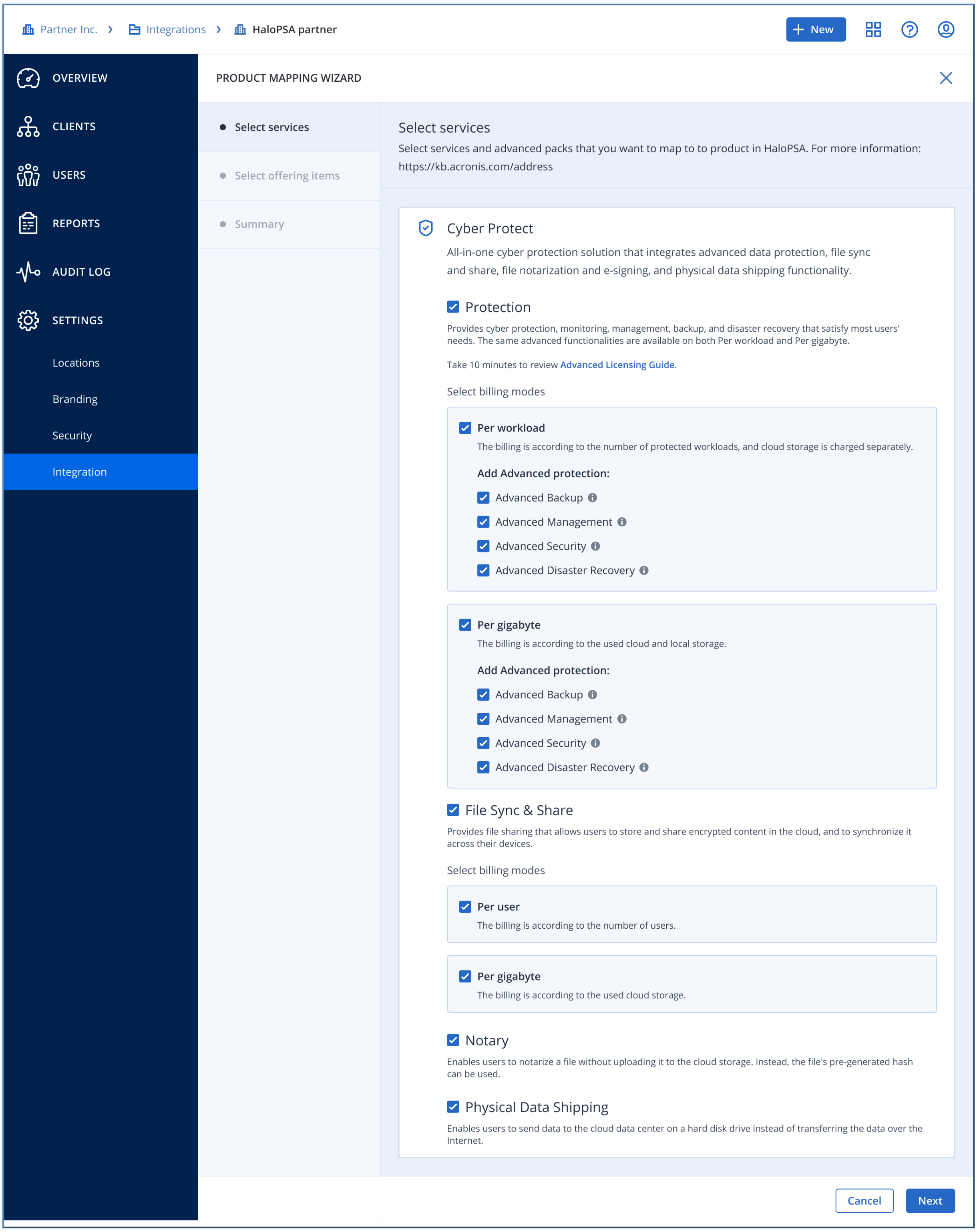
The wizards takes you through the following steps:

1. Go to the **Product mapping** tab and do either of the following:
   - If this is your first product mapping in this integration, click **Start mapping** in the middle of the page.
   - Otherwise, click **Edit products** in the top right.
2. Select the corresponding Acronis services, billing modes and advanced packs.
3. Choose offering items and map them to the respective HaloPSA recurring item.
4. Create any missing recurring items in HaloPSA.
5. Preview the configured mapping and click **Save**.
6. Check the overall final result of this configured mapping.

Step 1: Select Acronis services, billing modes and advanced packs

Select the services, billing modes and advanced packs that will be subject to mapping. Enabling/disabling a selection will respectively increase/decrease the list of offering items, available for mapping in the next step.

Only services, billing modes and advanced packs, enabled at partner level, will be available here.



Select services

Select services and advanced packs that you want to map to to product in HaloPSA. For more information: https://kb.acronis.com/address

Cyber Protect

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

☑ Protection

Provides cyber protection, monitoring, management, backup, and disaster recovery that satisfy most users' needs. The same advanced functionalities are available on both Per workload and Per gigabyte.

Take 10 minutes to review Advanced Licensing Guide.

Select billing modes

☑ Per workload

The billing is according to the number of protected workloads, and cloud storage is charged separately.

Add Advanced protection:

- ☑ Advanced Backup
- ☑ Advanced Management
- ☑ Advanced Security
- ☑ Advanced Disaster Recovery

☑ Per gigabyte

The billing is according to the used cloud and local storage.

Add Advanced protection:

- ☑ Advanced Backup
- ☑ Advanced Management
- ☑ Advanced Security
- ☑ Advanced Disaster Recovery

☑ File Sync & Share

Provides file sharing that allows users to store and share encrypted content in the cloud, and to synchronize it across their devices.

Select billing modes

☑ Per user

The billing is according to the number of users.

☑ Per gigabyte

The billing is according to the used cloud storage.

☑ Notary

Enables users to notarize a file without uploading it to the cloud storage. Instead, the file's pre-generated hash can be used.

☑ Physical Data Shipping

Enables users to send data to the cloud data center on a hard disk drive instead of transferring the data over the Internet.

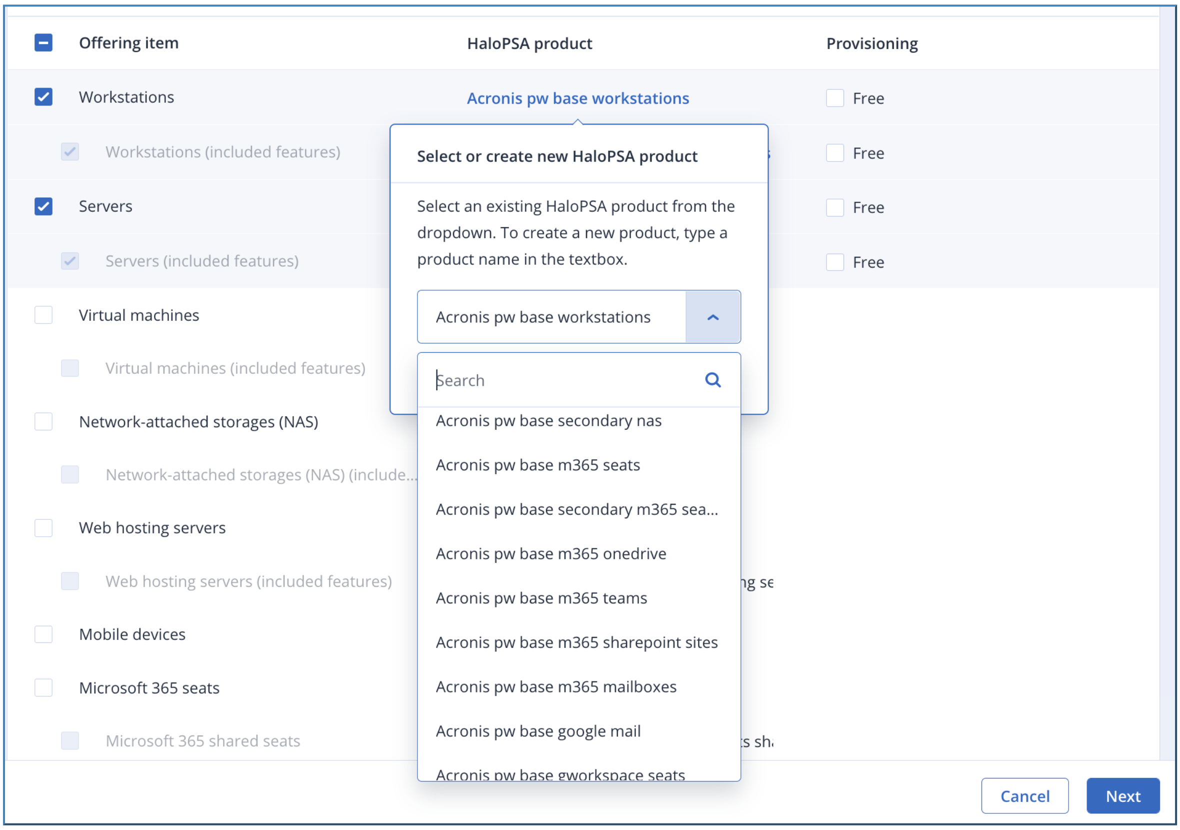
Step 2: Map offering items

At this step, the actual mapping is done. For every offering item, the following options are available:

- Map offering item to existing HaloPSA recurring item

You can search for and select from a list of target HaloPSA recurring items, available for mapping in the drop-down.

1. Select a product from the drop-down list.
2. Select your preferred HaloPSA recurring item from the list and click **Apply**.



▬ Offering item	HaloPSA product	Provisioning
☑ Workstations	Acronis pw base workstations	□ Free
☑ Workstations (included features)		□ Free
☑ Servers		□ Free
☑ Servers (included features)		□ Free
□ Virtual machines		
□ Virtual machines (included features)		
□ Network-attached storages (NAS)		
□ Network-attached storages (NAS) (include...		
□ Web hosting servers		
□ Web hosting servers (included features)	ng se	
□ Mobile devices		
□ Microsoft 365 seats		
□ Microsoft 365 shared seats	s sh	

Select or create new HaloPSA product

Select an existing HaloPSA product from the dropdown. To create a new product, type a product name in the textbox.

Acronis pw base workstations

Search
Acronis pw base secondary nas
Acronis pw base m365 seats
Acronis pw base secondary m365 sea...
Acronis pw base m365 onedrive
Acronis pw base m365 teams
Acronis pw base m365 sharepoint sites
Acronis pw base m365 mailboxes
Acronis pw base google mail
Acronis pw base gworkspace seats
Cancel
Next

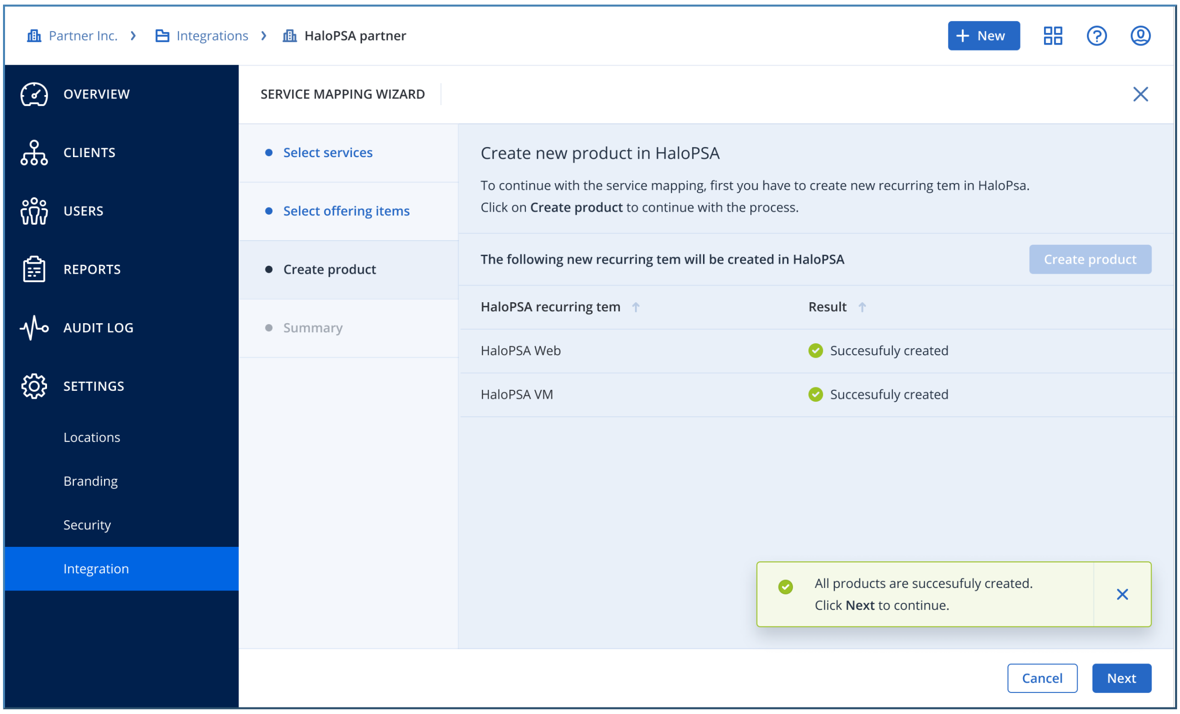
- Map offering item to a new HaloPSA product

You can type the name of the new HaloPSA product to be created, although this actually happens in the next step.

Before creating a new HaloPSA product from within the Acronis integration, it is very important for you to select a product group from **Integration settings** menu > **HaloPSA products provisioning** tab.

1. Locate and check the box next to the offering item.
2. In the text box that opens, provide the new product name and click **Apply**.
3. A new section will appear in the **Create products** wizard.
4. Click the **Create products** button.

5. Click **Next** and a summary of all newly created HaloPSA recurring items will appear. You can then map them to Acronis offering items.
6. If there is an error when creating a particular HaloPSA PBI, it will be flagged as **failed**. You can then go back to the previous step and provide a new name.
7. Make sure to revise the created recurring items before including them in a recurring invoice.



Create new product in HaloPSA

To continue with the service mapping, first you have to create new recurring tem in HaloPsa.
Click on **Create product** to continue with the process.

The following new recurring tem will be created in HaloPSA

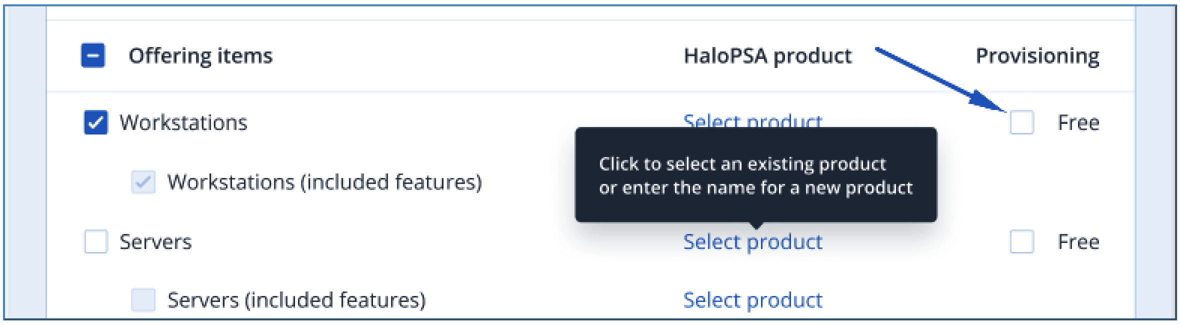
HaloPSA recurring tem	Result
HaloPSA Web	✓ Succesufuly created
HaloPSA VM	✓ Succesufuly created

✓ All products are succesufuly created.
Click **Next** to continue.

- Map offering item as free provisioning

Offering items marked as "free provisioning" will be enabled for all mapped customer tenants. Their quota will be forced to unlimited. These offering items are excluded from the quota update and usage report synchronization process.

1. Locate and check the box next to the offering item.
2. Click on the **Free provisioning** checkbox.



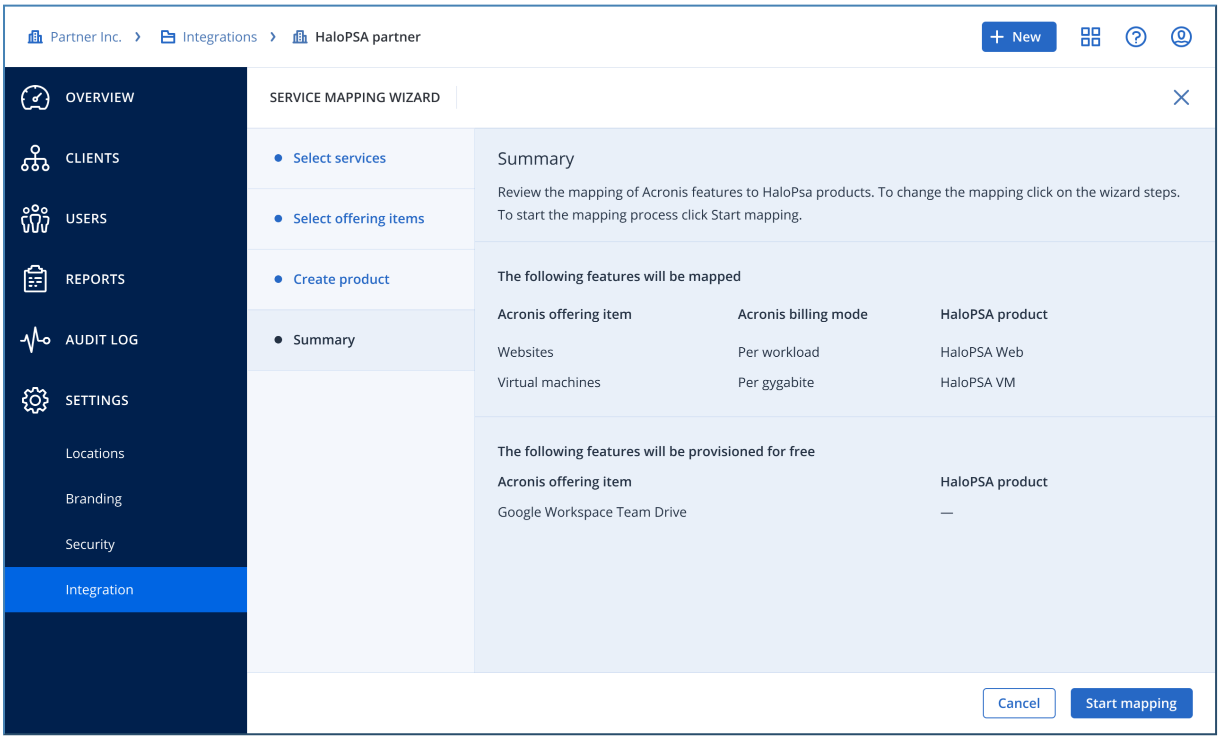
Offering items	HaloPSA product	Provisioning
☑ Workstations	Select product	□ Free
☑ Workstations (included features)		
□ Servers	Select product	□ Free
□ Servers (included features)	Select product	

Click to select an existing product or enter the name for a new product

Step 3: Summary

You have to review the mapping changes to be saved. This includes the following list of offering items:

- mapped to their corresponding HaloPSA recurring items
- free provisioned
- unmapped



Summary

Review the mapping of Acronis features to HaloPsa products. To change the mapping click on the wizard steps. To start the mapping process click Start mapping.

The following features will be mapped

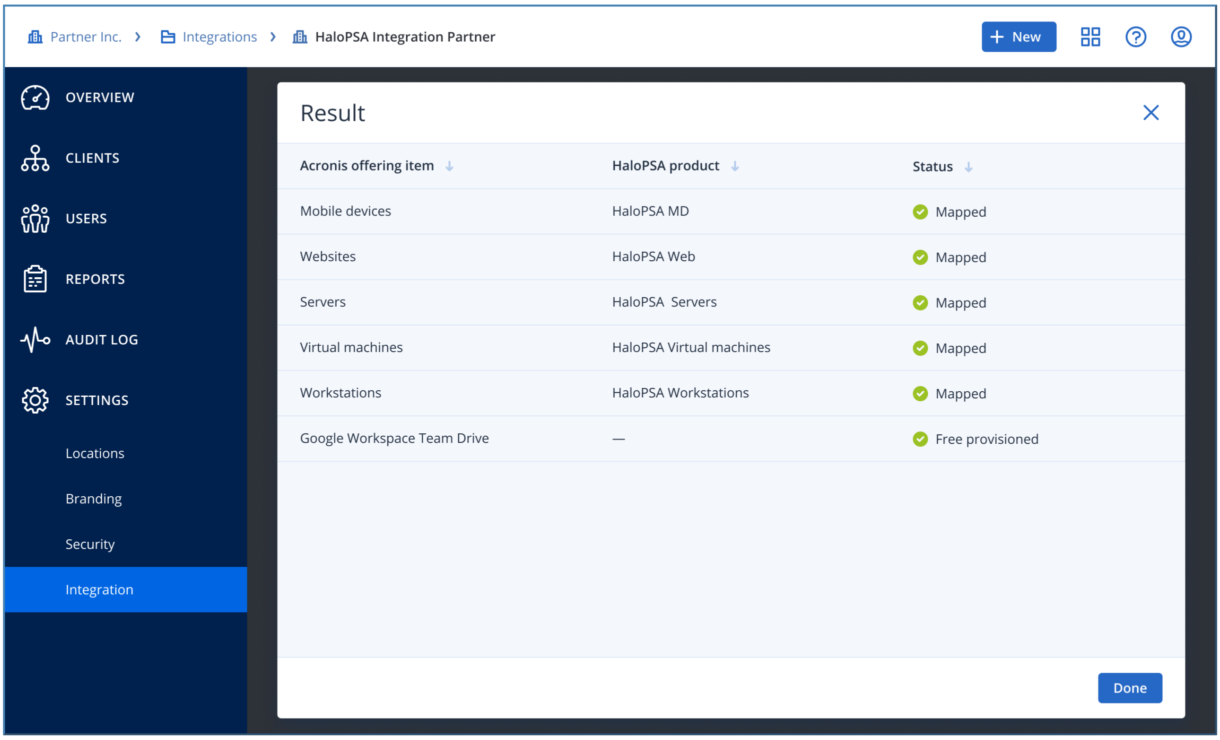
Acronis offering item	Acronis billing mode	HaloPSA product
Websites	Per workload	HaloPSA Web
Virtual machines	Per gygabite	HaloPSA VM

The following features will be provisioned for free

Acronis offering item	HaloPSA product
Google Workspace Team Drive	—

Step 4: Result

You can view the actual result of saving the mapping.



Result

Acronis offering item	HaloPSA product	Status
Mobile devices	HaloPSA MD	✓ Mapped
Websites	HaloPSA Web	✓ Mapped
Servers	HaloPSA Servers	✓ Mapped
Virtual machines	HaloPSA Virtual machines	✓ Mapped
Workstations	HaloPSA Workstations	✓ Mapped
Google Workspace Team Drive	—	✓ Free provisioned

Adding mapped Acronis offering items to HaloPSA recurring invoices

When you have already mapped Acronis offering items to HaloPSA recurring items, these will appear as Recurring Items in your integration. You can also add them to the customer's recurring invoices.

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

Important

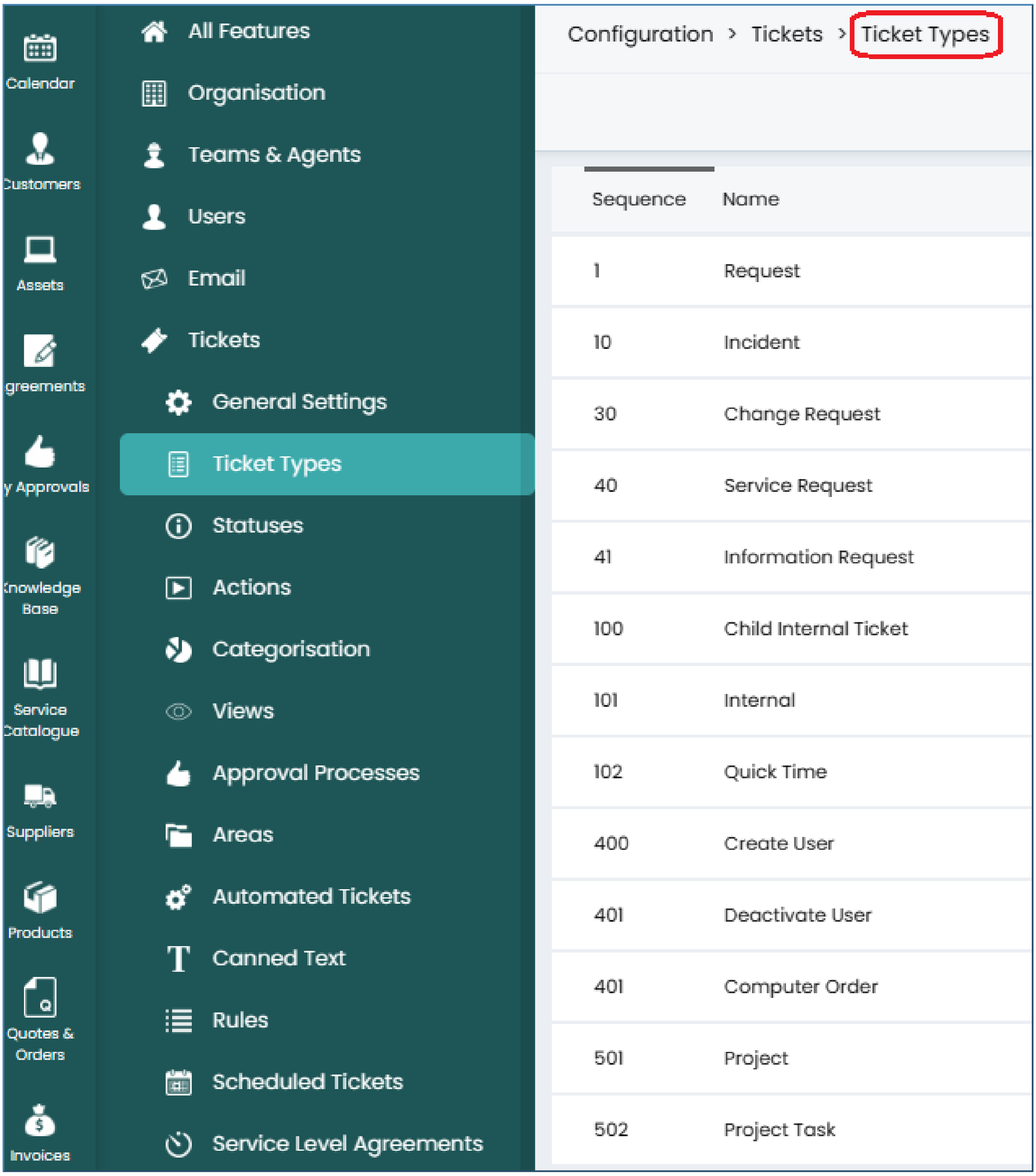
By default, everything is enabled as prepaid at the beginning. To set a recurrring item as pay-as-you-go (metered), you have to add it to a recurring invoice and set a quantity different from 0. Then save and select it again, mark the **Is metered** checkbox and set the quantity to 0.

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

Mapping alerts to tickets

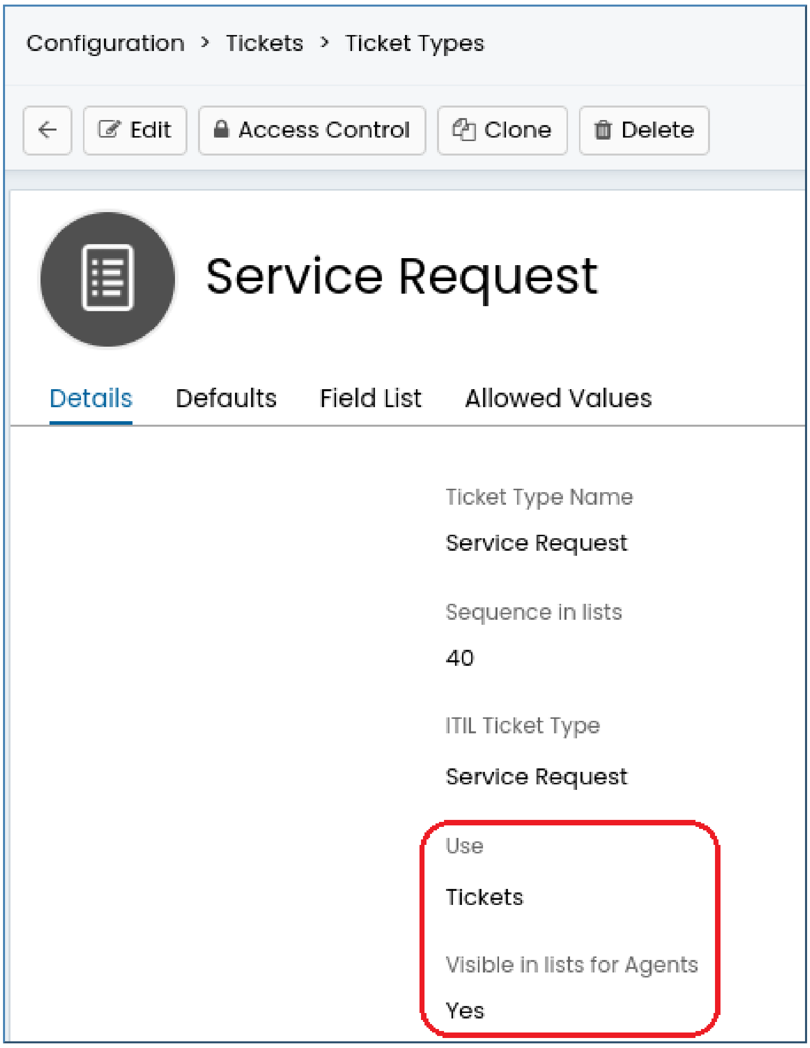
Prerequisites

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



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**



Ticket Type Name
Service Request

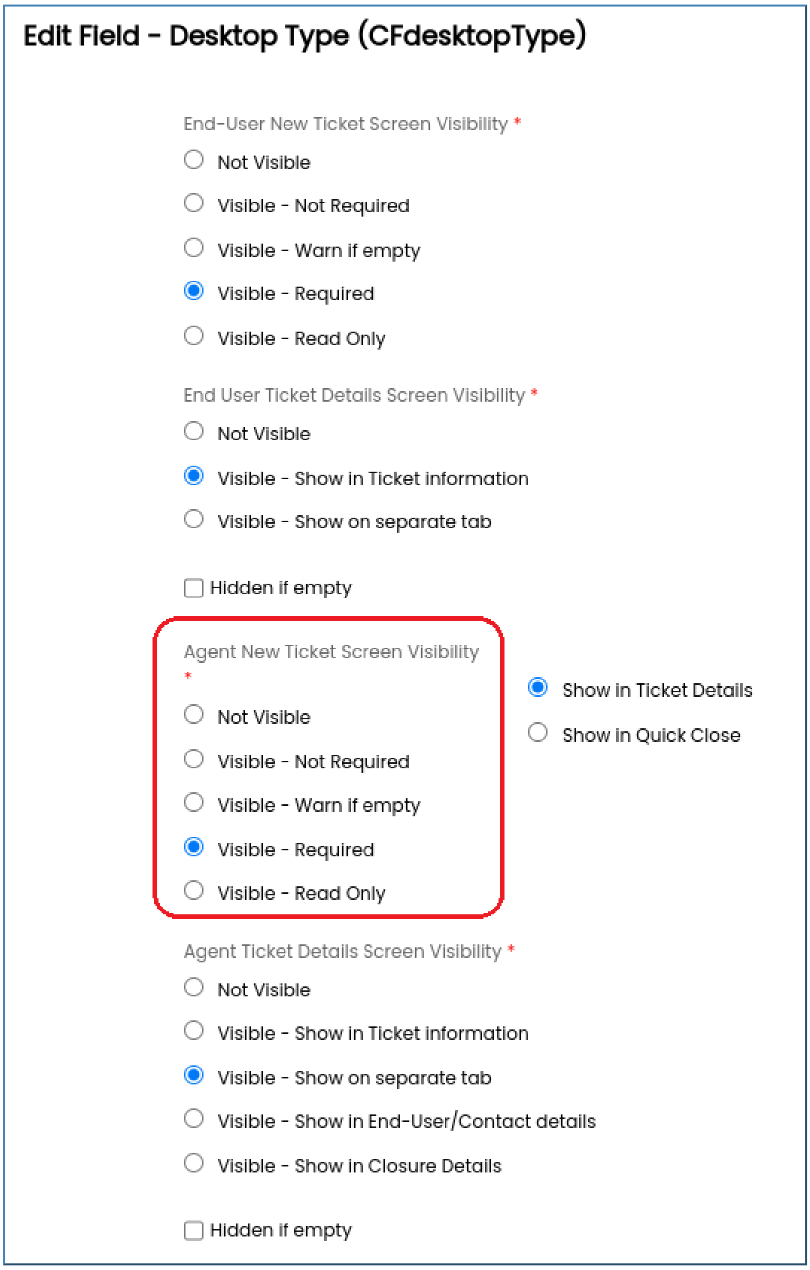
Sequence in lists
40

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

Enabling ticket creation feature

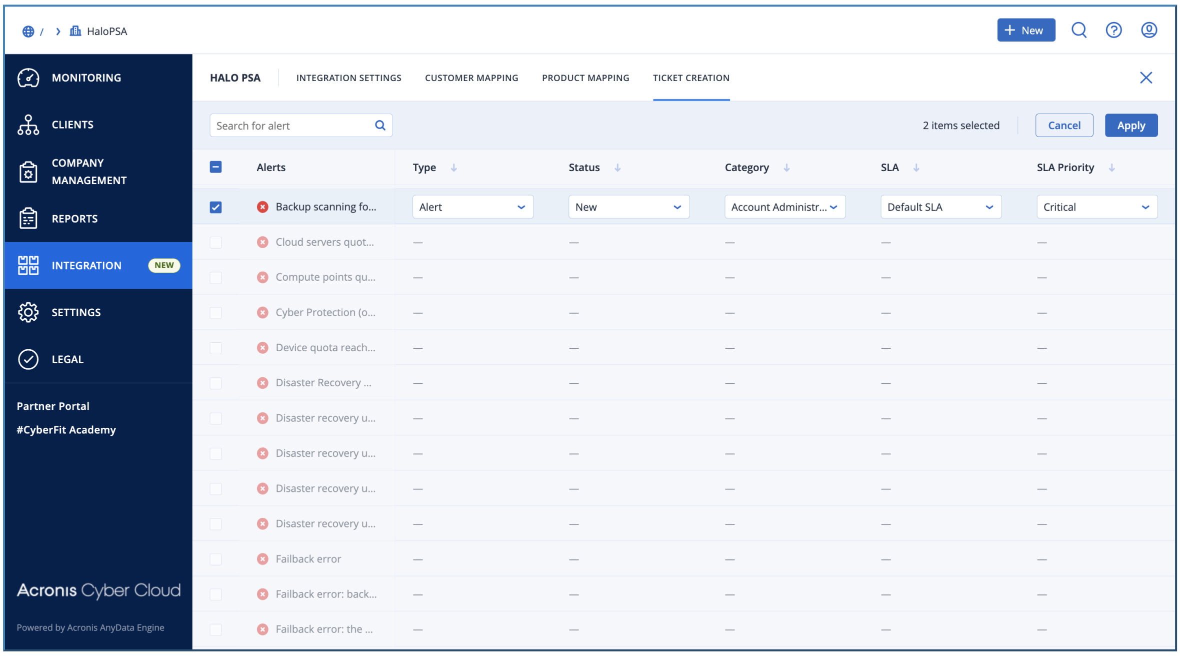
By default, the ticket creation feature is disabled after a HaloPSA installation. To enable it:

1. Go to the **Integration settings** tab > **Features** section.
2. Locate the **Ticket creation** feature switch button and turn it on.

Choosing Acronis alerts that generate tickets

To configure which alerts should generate tickets in HaloPSA:

1. Go to the **Ticket creation** tab.
2. Locate the alert you want to configure. Use the **Filter** box at the top to sort alerts by their name.
3. Enable the ticket generation for a particular alert by selecting its associated checkbox.
4. Specify values for **Type**, **Status**, **Category**, **SLA** and **SLA Priority** to be used when creating the ticket in HaloPSA. The values of these properties depend on the HaloPSA ticket configuration.
5. Click **Apply**.



2 items selected

☐	Alerts	Type	Status	Category	SLA	SLA Priority
☑	Backup scanning fo...	Alert	New	Account Administr...	Default SLA	Critical
☐	Cloud servers quot...	—	—	—	—	—
☐	Compute points qu...	—	—	—	—	—
☐	Cyber Protection (o...	—	—	—	—	—
☐	Device quota reach...	—	—	—	—	—
☐	Disaster Recovery ...	—	—	—	—	—
☐	Disaster recovery u...	—	—	—	—	—
☐	Disaster recovery u...	—	—	—	—	—
☐	Disaster recovery u...	—	—	—	—	—
☐	Disaster recovery u...	—	—	—	—	—
☐	Failback error	—	—	—	—	—
☐	Failback error: back...	—	—	—	—	—
☐	Failback error: the ...	—	—	—	—	—

The **Alerts** column is sorted by mapping status. Alerts already mapped to tickets always come on top of the list.

Quota and usage synchronization

Key concepts

In the context of the HaloPSA 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 automatically enable the quota and usage synchronization process as well.

Prerequisites in HaloPSA

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

Active recurring invoice means that it should have a valid start and end date.

In case the MSP has more than one active recurring invoices, 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, the synchronization will generate an error visible at the mapped customer level.

Offering item provisioning/deprovisioning and quota configuration

This process is triggered every 10 minutes. During this period, the integration:

- Gets the list of the mapped Acronis customer tenants
- For each mapped Acronis customer tenant, it scans for active recurring invoices
- Compares the recurring items, listed as additional charges to the mapped offering items
- Resultant offering item provision/deprovision/configuration is done as in the table below

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**	
Mapping status	**Free provisioning**	**Included in recurring invoice**	**Additional charge**	**Quantity**	**Status**	**Quota**
Not mapped	*Not relevant*	*Not relevant*	*Not relevant*	*Not relevant*	Disabled	*Not relevant*
Mapped	Yes	No	*Not relevant*	*Not relevant*	Enabled	Unlimited
	Yes	Yes	*Not relevant*	*Not relevant*	Enabled	Unlimited
	No	No	*Not relevant*	*Not relevant*	Disabled	*Not relevant*
		Yes	PREPAID	***Q***	Enabled	Hard quota ***Q***
			PAYG	***0***	Enabled	Unlimited
			PREPAID and PAYG	***Q / 0***	Enabled	Soft quota ***Q***

Report offering item usage to HaloPSA

This process is triggered once a day at 04:00 UTC and the integration does the following:

- Gets the list of mapped Acronis customer tenants
- For each mapped Acronis customer tenant:
  - generates an offering item usage report
  - scans for an active recurring invoice
- Using all the above information, it adds additional charges to the recurring invoice as in the table below

Input 1: Offering item configuration in the integration		**Input 2: Offering item stats**			**Result: Added extra charge in HaloPSA**	
Mapping status	**Free provisioning**	**Quota**	**Overage**	**Usage**	**Prefix**	**Quantity**
Not mapped	*Not relevant*	*Ignored*	*Ignored*	*Ignored*	*Not relevant*	*Not relevant*
Mapped	Yes	*Ignored*	*Ignored*	*Ignored*	*Not relevant*	*Not relevant*
	No	***Q*** *(Hard)*	***0***	*Ignored*	*Not relevant*	*Not relevant*
		Unlimited	Unlimited	***U***	[PAYG]	***U***
		Q *(Soft)*	Unlimited	***U***	[Overage]	***U - Q*** ! Only if usage is more than quota

Reporting storage usage

Storage consumption can be accounted for in the following ways:

- **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
- **Class 2 (billed) usage reporting** - report the billed usage alone

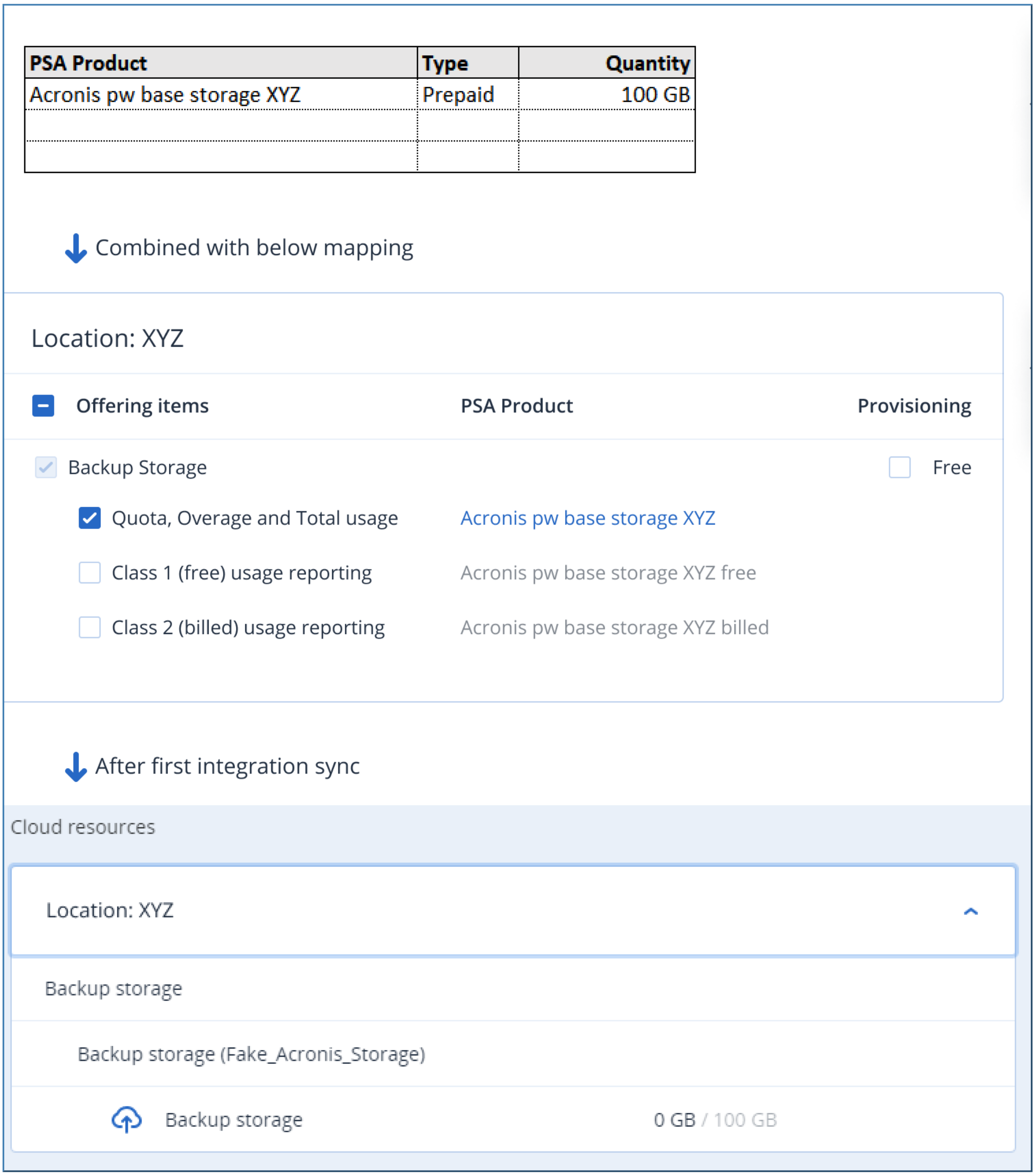
Depending on the amounts that have to be reported to PSA, you can select any combination of these options.

Selecting any of the available options will automatically enable the backup storage. Deselecting all of them will respectively disable it.

Sample scenarios

Find some illustrations below of how these options can be used in practice.

PREPAID Overage usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB

↓ Combined with below mapping

Location: XYZ

⊟ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☑ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☐ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☐ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

↓ After first integration sync

Cloud resources

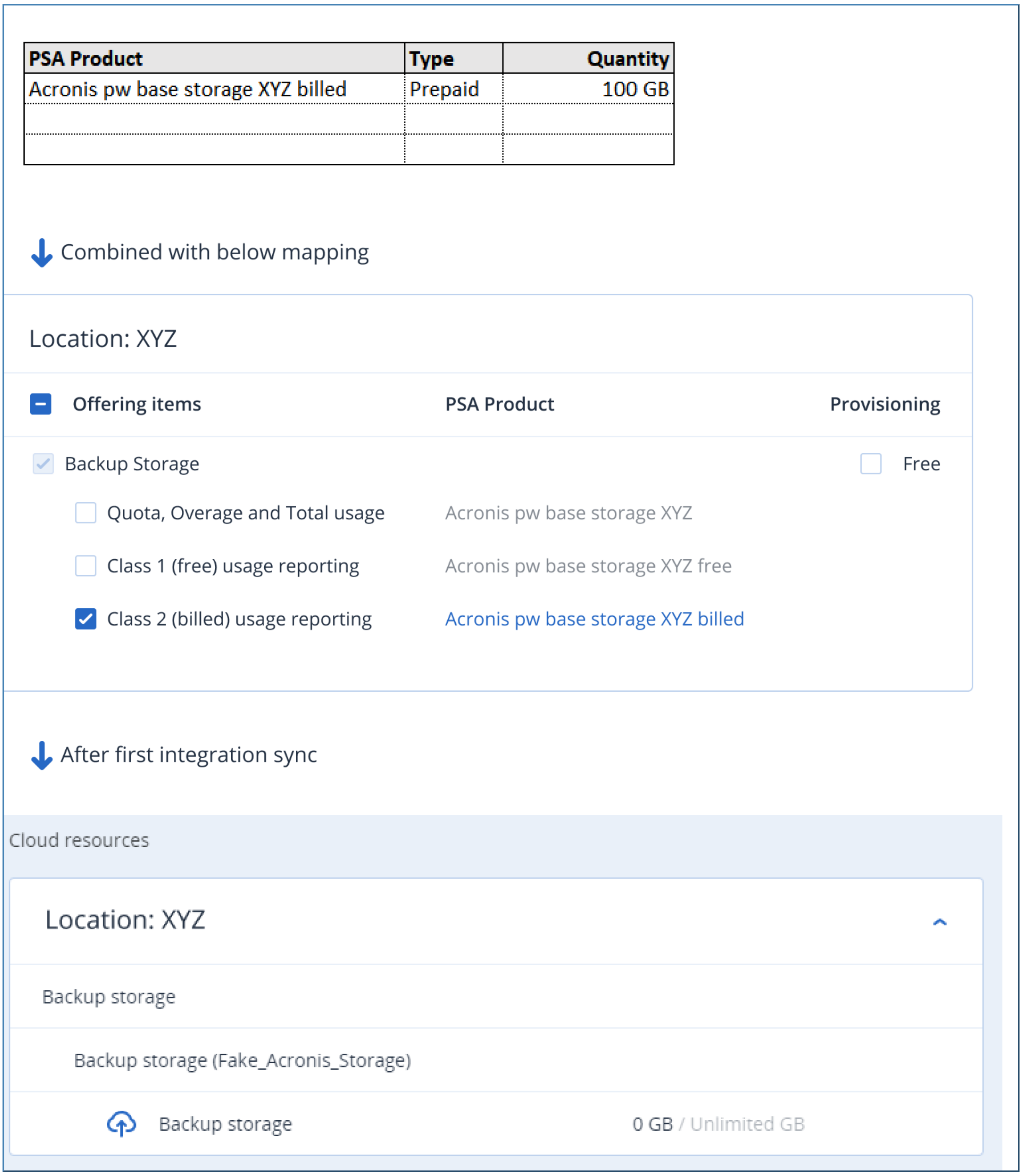
Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / 100 GB

PREPAID Class 2 (billed) usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ billed	Prepaid	100 GB

Combined with below mapping

Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☐ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☐ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☑ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync

Cloud resources

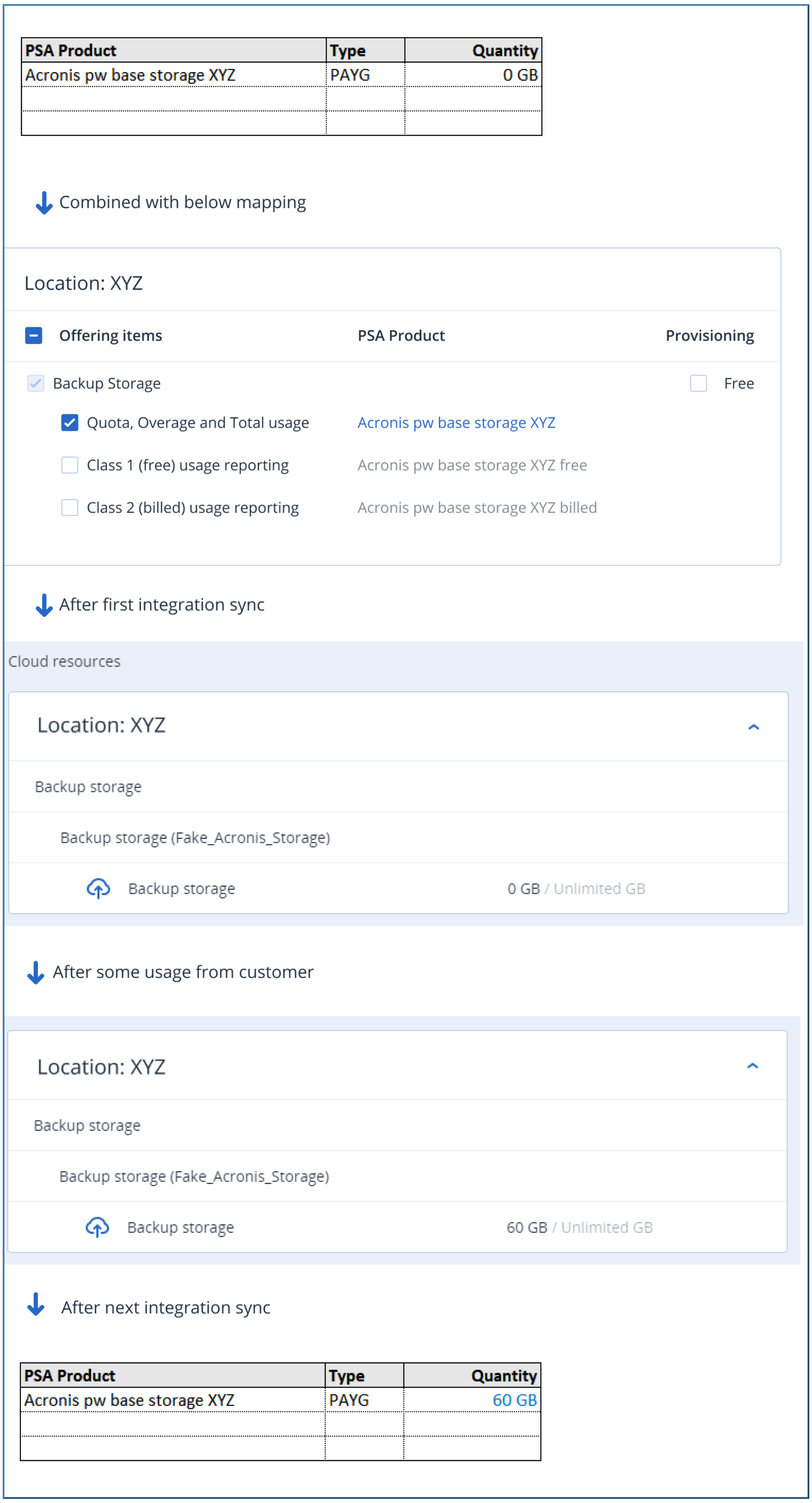
Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / Unlimited GB

PAYG Overage usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ	PAYG	0 GB

Combined with below mapping

Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☑ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☐ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☐ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync

Cloud resources

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / Unlimited GB

After some usage from customer

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 60 GB / Unlimited GB

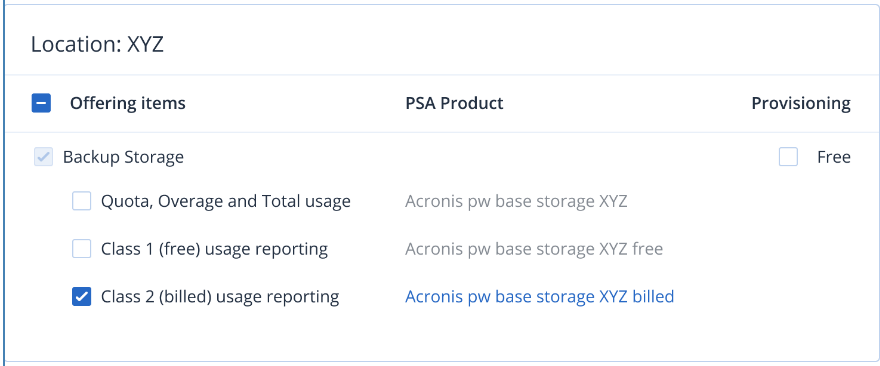
After next integration sync

PSA Product	Type	Quantity
Acronis pw base storage XYZ	PAYG	60 GB

PAYG Class 2 (billed) usage

PSA Product	Type	Quantity
Acronis pw base storage XYZ billed	PAYG	0 GB

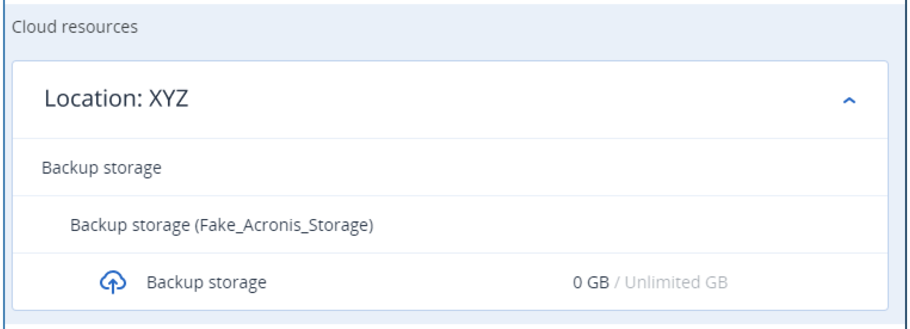
Combined with below mapping



Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☐ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☐ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☑ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync



Cloud resources

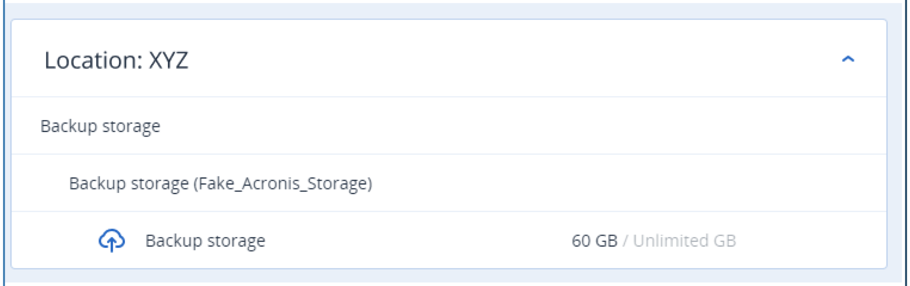
Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / Unlimited GB

After some usage from customer say we have **60** GB total usage, **50** of which is class 2



Location: XYZ

Backup storage

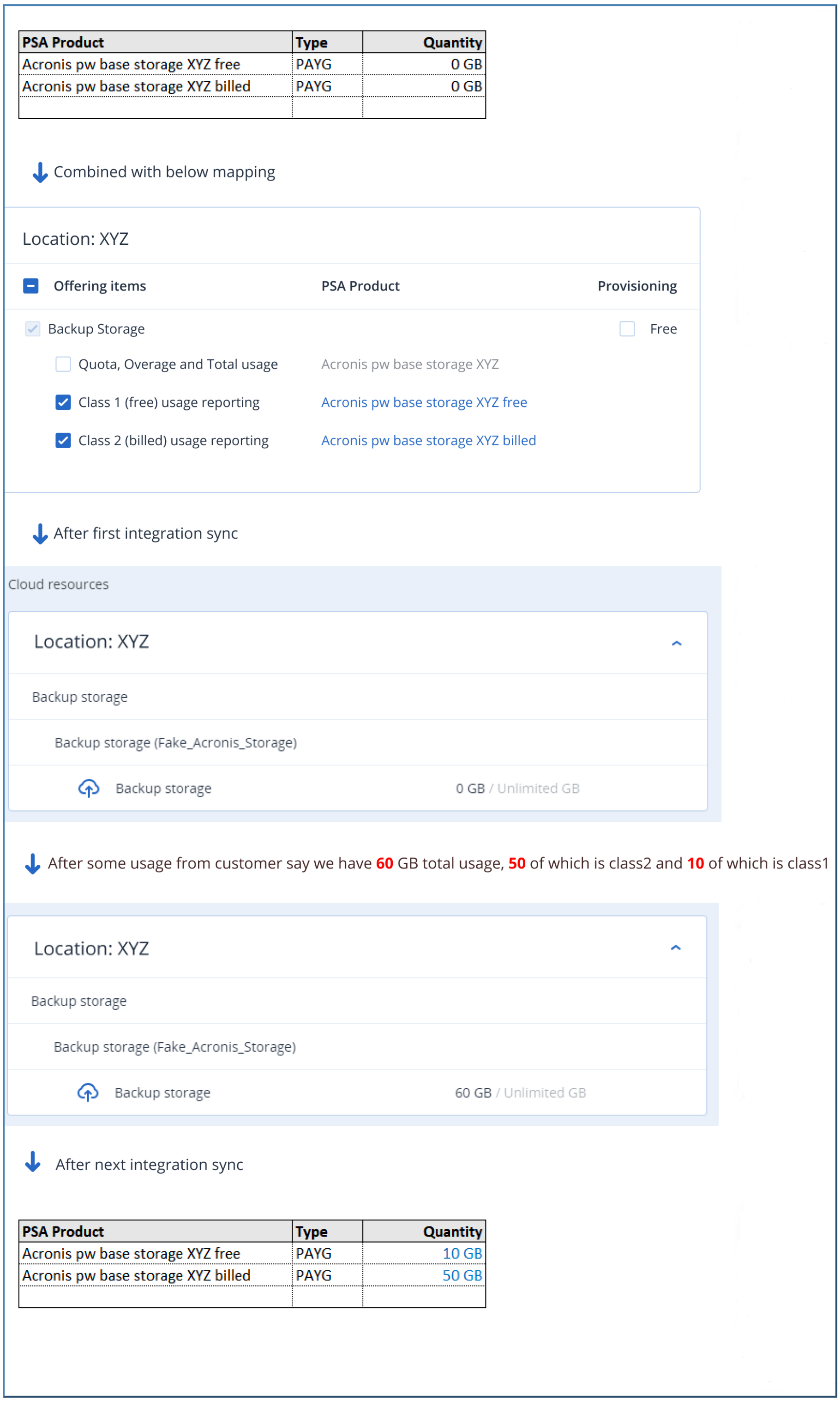
Backup storage (Fake_Acronis_Storage)

Backup storage 60 GB / Unlimited GB

After next integration sync

PSA Product	Type	Quantity
Acronis pw base storage XYZ billed	PAYG	50 GB

PAYG Class 1 and Class 2 usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ free	PAYG	0 GB
Acronis pw base storage XYZ billed	PAYG	0 GB

Combined with below mapping

Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☐ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☑ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☑ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync

Cloud resources

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / Unlimited GB

After some usage from customer say we have **60** GB total usage, **50** of which is class2 and **10** of which is class1

Location: XYZ

Backup storage

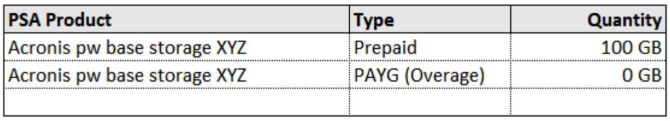
Backup storage (Fake_Acronis_Storage)

Backup storage 60 GB / Unlimited GB

After next integration sync

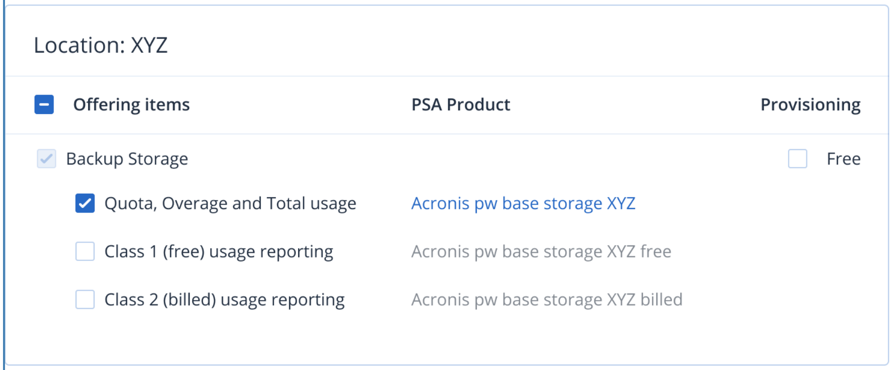
PSA Product	Type	Quantity
Acronis pw base storage XYZ free	PAYG	10 GB
Acronis pw base storage XYZ billed	PAYG	50 GB

PREPAID Overage usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB
Acronis pw base storage XYZ	PAYG (Overage)	0 GB

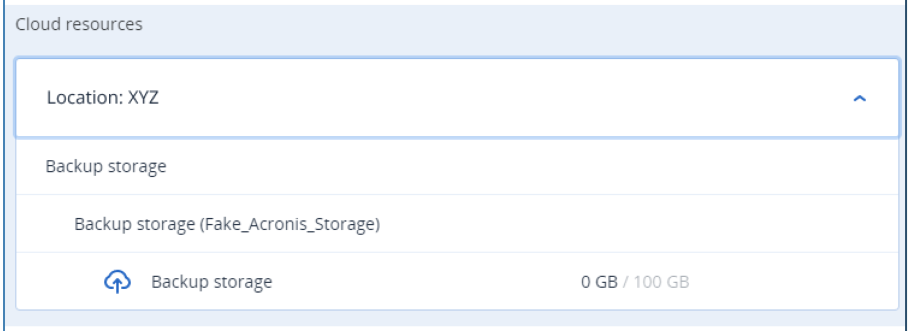
↓ Combined with below mapping



Location: XYZ

▣ Offering items	PSA Product	Provisioning
☑ Backup Storage		□ Free
☑ Quota, Overage and Total usage	Acronis pw base storage XYZ	
□ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
□ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

↓ After first integration sync



Cloud resources

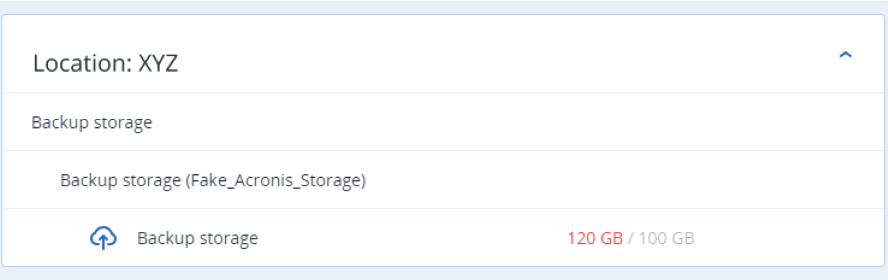
Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / 100 GB

↓ After some usage from customer say we have **120** GB total usage



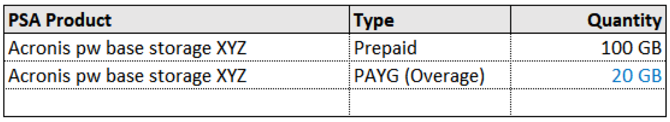
Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

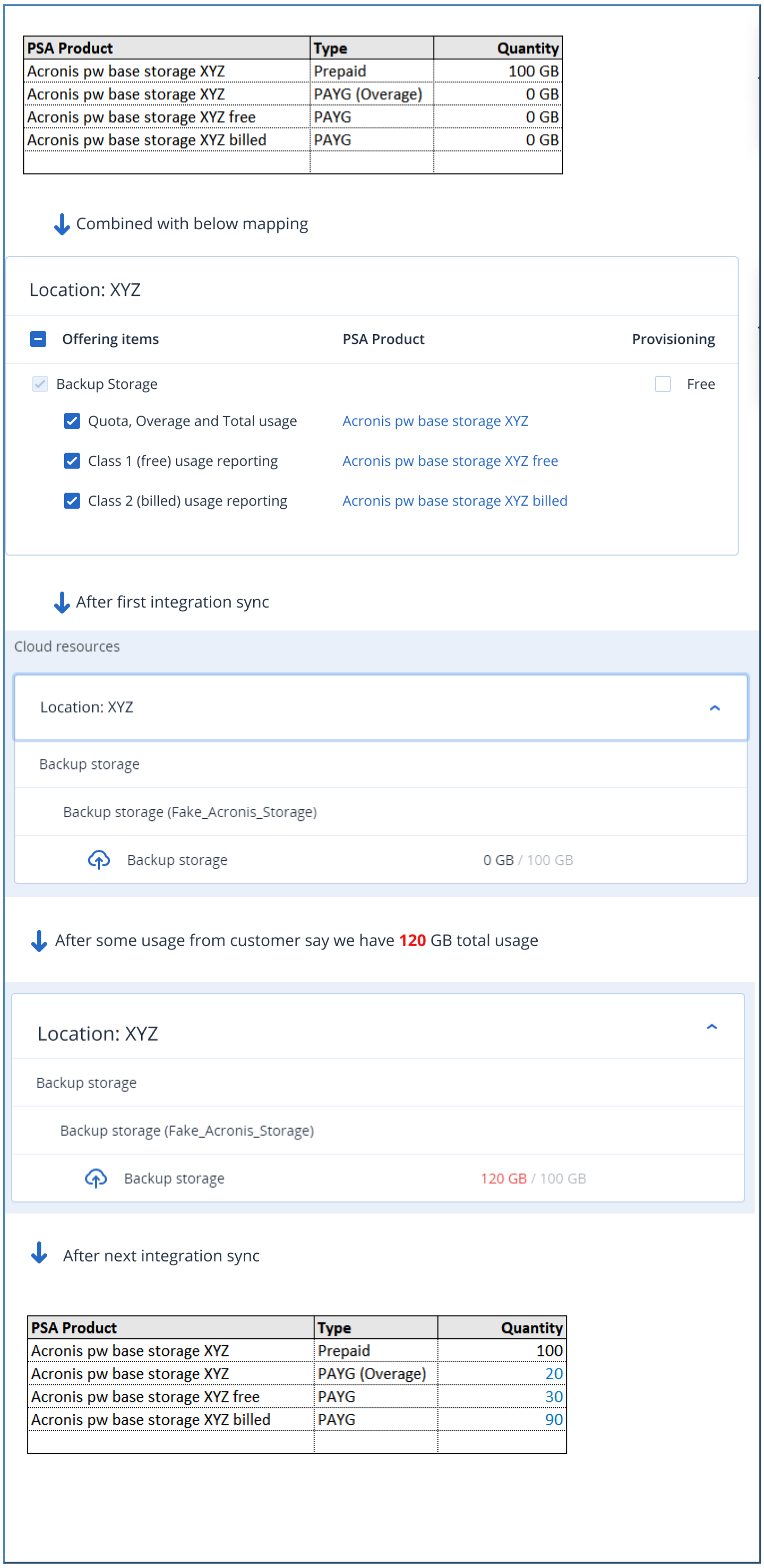
Backup storage 120 GB / 100 GB

↓ After next integration sync



PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB
Acronis pw base storage XYZ	PAYG (Overage)	20 GB

PREPAID Overage, Class 1 and Class 2 usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB
Acronis pw base storage XYZ	PAYG (Overage)	0 GB
Acronis pw base storage XYZ free	PAYG	0 GB
Acronis pw base storage XYZ billed	PAYG	0 GB

Combined with below mapping

Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		☐ Free
☑ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☑ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☑ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync

Cloud resources

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / 100 GB

After some usage from customer say we have **120** GB total usage

Location: XYZ

Backup storage

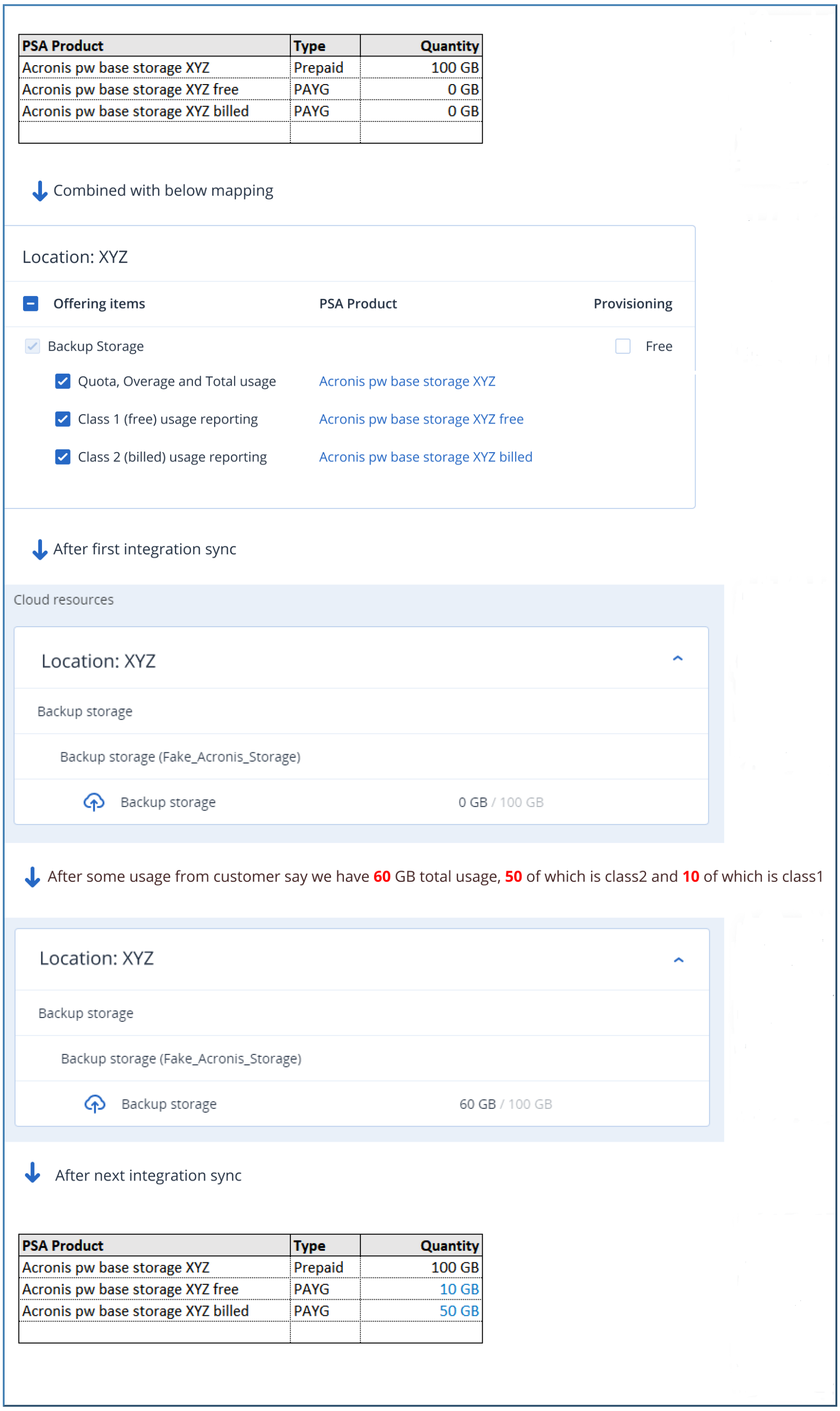
Backup storage (Fake_Acronis_Storage)

Backup storage 120 GB / 100 GB

After next integration sync

PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100
Acronis pw base storage XYZ	PAYG (Overage)	20
Acronis pw base storage XYZ free	PAYG	30
Acronis pw base storage XYZ billed	PAYG	90

PREPAID & PAYG with Overage, Class 1 and Class 2 usage



PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB
Acronis pw base storage XYZ free	PAYG	0 GB
Acronis pw base storage XYZ billed	PAYG	0 GB

Combined with below mapping

Location: XYZ

☐ Offering items	PSA Product	Provisioning
☑ Backup Storage		□ Free
☑ Quota, Overage and Total usage	Acronis pw base storage XYZ	
☑ Class 1 (free) usage reporting	Acronis pw base storage XYZ free	
☑ Class 2 (billed) usage reporting	Acronis pw base storage XYZ billed	

After first integration sync

Cloud resources

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 0 GB / 100 GB

After some usage from customer say we have **60** GB total usage, **50** of which is class2 and **10** of which is class1

Location: XYZ

Backup storage

Backup storage (Fake_Acronis_Storage)

Backup storage 60 GB / 100 GB

After next integration sync

PSA Product	Type	Quantity
Acronis pw base storage XYZ	Prepaid	100 GB
Acronis pw base storage XYZ free	PAYG	10 GB
Acronis pw base storage XYZ billed	PAYG	50 GB

Practical examples and use cases

The next section illustrates some real stories on how to configure HaloPSA recurring invoices, how offering items are configured and how usage is reported. These use cases are all based on the following assumptions:

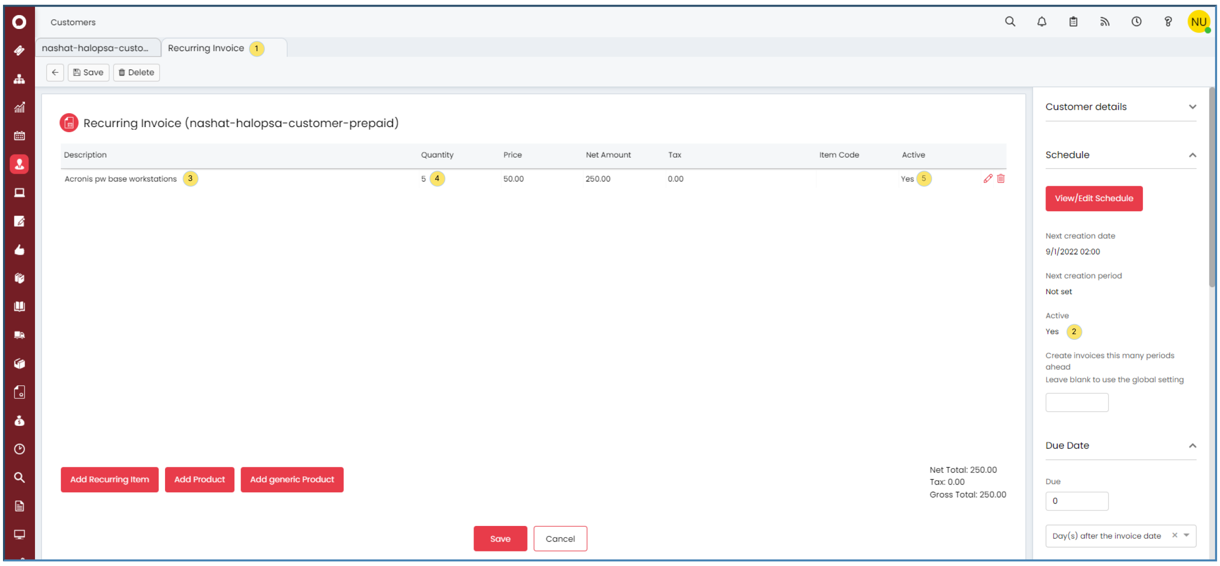
- HaloPSA customer is already mapped to the Acronis customer tenant
- The following mapping has been established between HaloPSA recurring items and Acronis offering items:

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

Use case 1: Selling a PREPAID service to the customer (no expected overage)

To sell the customer upfront 5 slots for workstation protection, do the following:

1. Create a **Recurring Invoice** and make it **Active**.
2. Add **Acronis pw base workstations** recurring item to the invoice.
3. Set the quantity that indicates this is a PREPAID service.
4. Make the recurring item **Active**.



Recurring Invoice (nashat-halopsa-customer-prepaid)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pw base workstations	5	50.00	250.00	0.00		Yes

Net Total: 250.00
Tax: 0.00
Gross Total: 250.00

Next creation date
9/1/2022 02:00

Next creation period
Not set

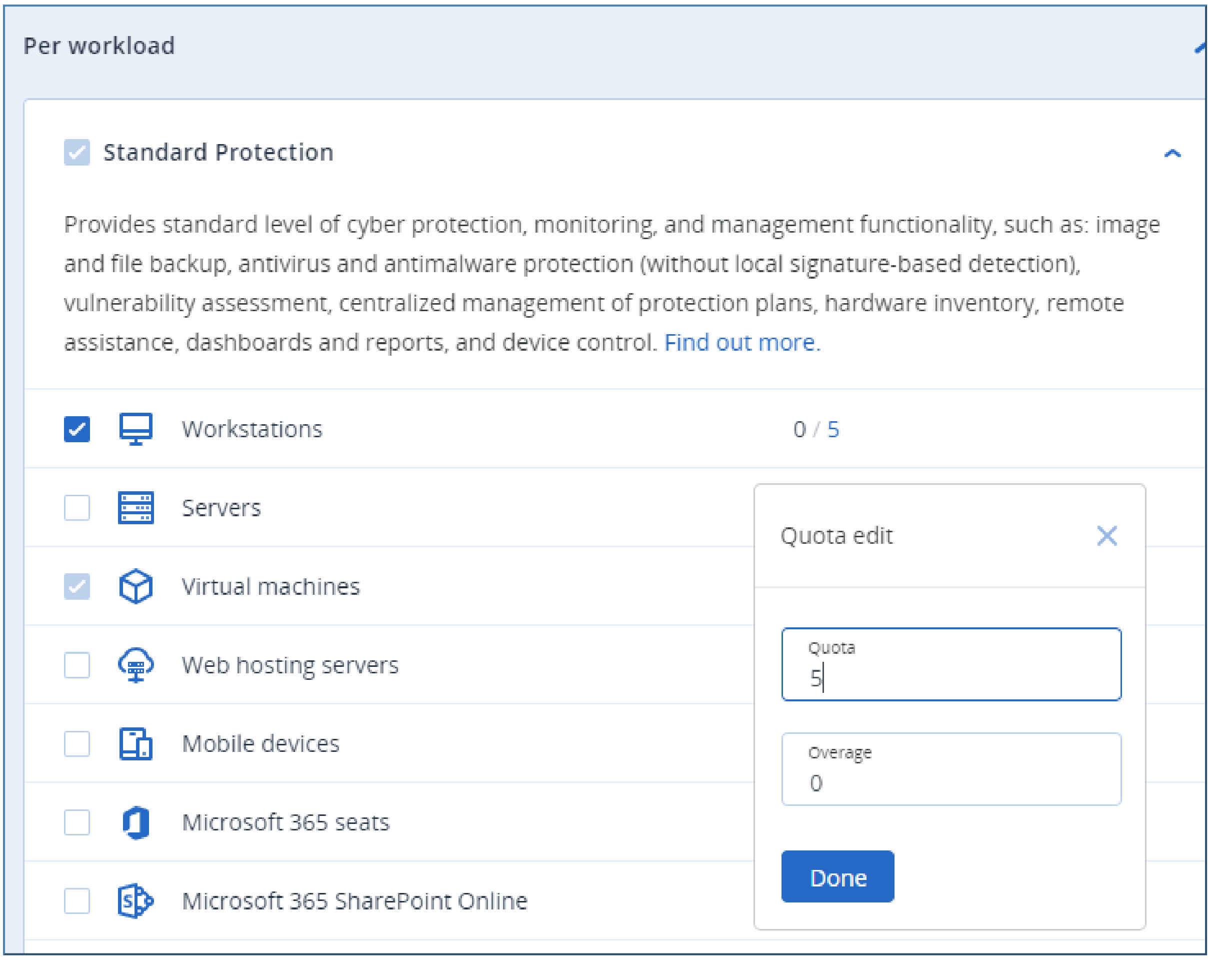
Active
Yes

Create invoices this many periods ahead
Leave blank to use the global setting

Due
0

Day(s) after the invoice date

Now on Acronis side, the integration detects this recurring invoice line configuration. Next, it will set the OI quota to 5 with overage = 0 for the mapped Acronis customer tenant.



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.

☑ Workstations 0 / 5

□ Servers

☑ Virtual machines

□ Web hosting servers

□ Mobile devices

□ Microsoft 365 seats

□ Microsoft 365 SharePoint Online

Quota edit

Quota: 5

Overage: 0

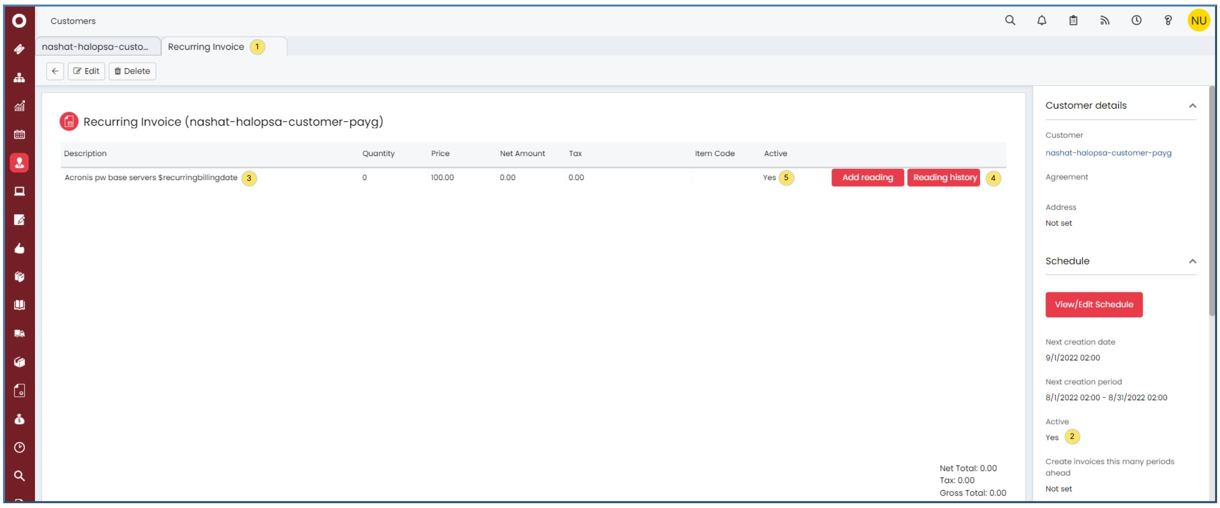
If at the end of the billing cycle, no quota is exceeded, then on HaloPSA side, the customer will be billed for the 5 prepaid protected slots.

Use case 2: Selling a PAYG service to the customer

To sell the customer pay-as-you-go slots for server protection, do the following:

1. Create a **Recurring Invoice** and make it **Active**.
2. Add **Acronis pw base server** recurring item to the invoice.
3. Turn on the **Is Meter** flag. This will display the **Add reading** and **Reading history** buttons next to the recurring item.
4. Make the recurring item **Active**.

The recurring invoice should look like this:



Recurring Invoice (nashat-halopsa-customer-payg)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active
Acronis pw base servers $recurringbillingdate	0	100.00	0.00	0.00		Yes

Net Total: 0.00
Tax: 0.00
Gross Total: 0.00

Customer details

Customer
nashat-halopsa-customer-payg

Agreement

Address
Not set

Schedule

Next creation date
9/1/2022 02:00

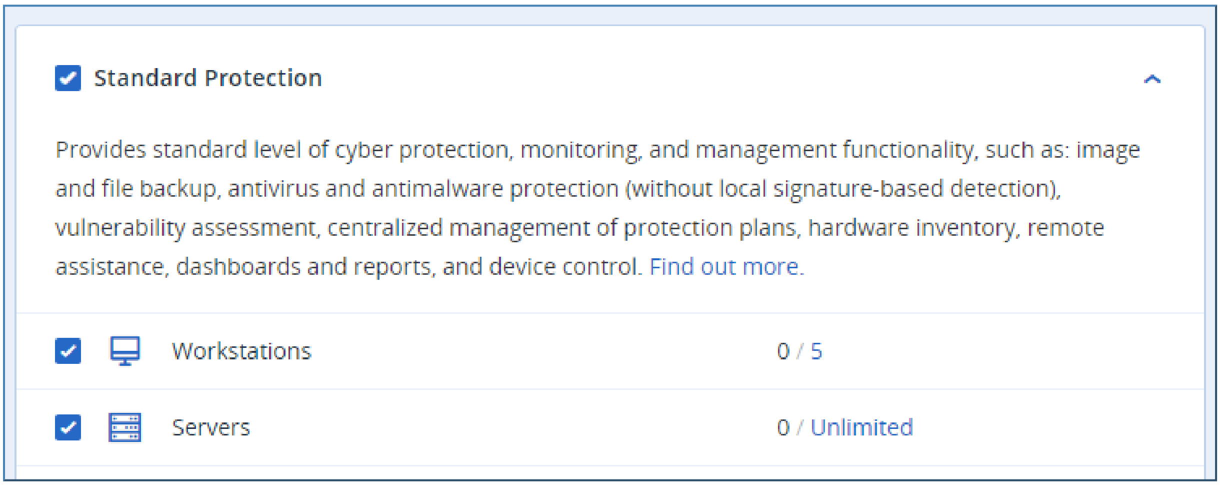
Next creation period
8/1/2022 02:00 - 8/31/2022 02:00

Active
Yes

Create invoices this many periods ahead
Not set

On Acronis side, the integration detects this recurring invoice line configuration. Then it will set the feature quota to **Unlimited** for the mapped Acronis customer tenant.

This is how the Cyber Protect configuration in Acronis will look like after synchronization:



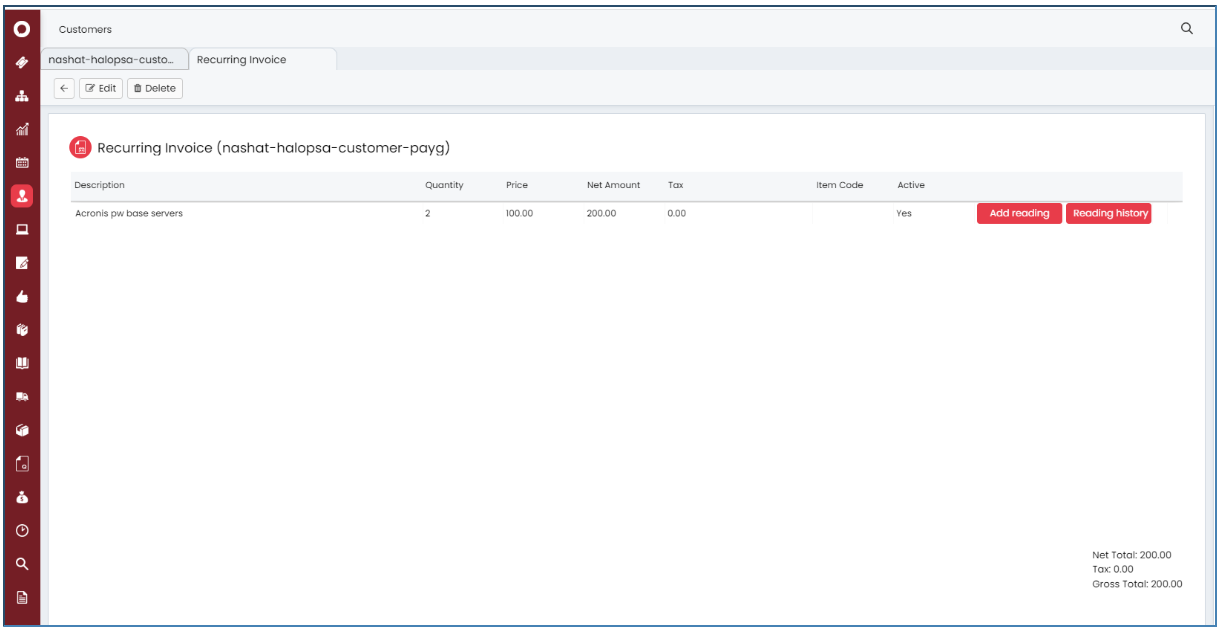
☑ Standard Protection

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.

☑	Workstations	0 / 5
☑	Servers	0 / Unlimited

During sync, if server protection has been used in Acronis, the integration will update the recurring invoice line quantity with the actual usage.

Now at the end of the billing cycle, assuming that the integration has reported 2 protected server workloads, the recurring invoice will look like the following:



Recurring Invoice (nashat-halopsa-customer-payg)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active		
Acronis pw base servers	2	100.00	200.00	0.00		Yes	Add reading	Reading history

Net Total: 200.00
Tax: 0.00
Gross Total: 200.00

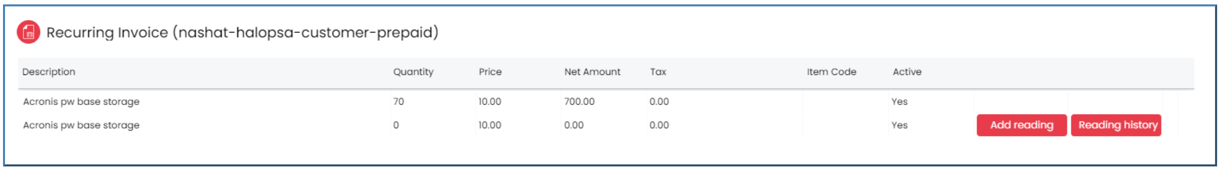
Use case 3: Selling a PREPAID service to the customer (expected overage)

To illustrate how to sell the same service to customers on PREPAID and PAYG basis combined, let's use the following example:

A customer buys 50 GB storage space but expects at some point this number to increase, due to higher demand.

1. Create a **Recurring Invoice** and make it **Active**.
2. Add **Acronis pw base storage** recurring item to the invoice and set the quantity to 50 to indicate that this is a PREPAID line.
3. Add another **Acronis pw base storage** recurring item to the invoice, setting the **Is Meter** flag to **true** to indicate that this is a PAYG line.
4. Make the recurring items **Active**.

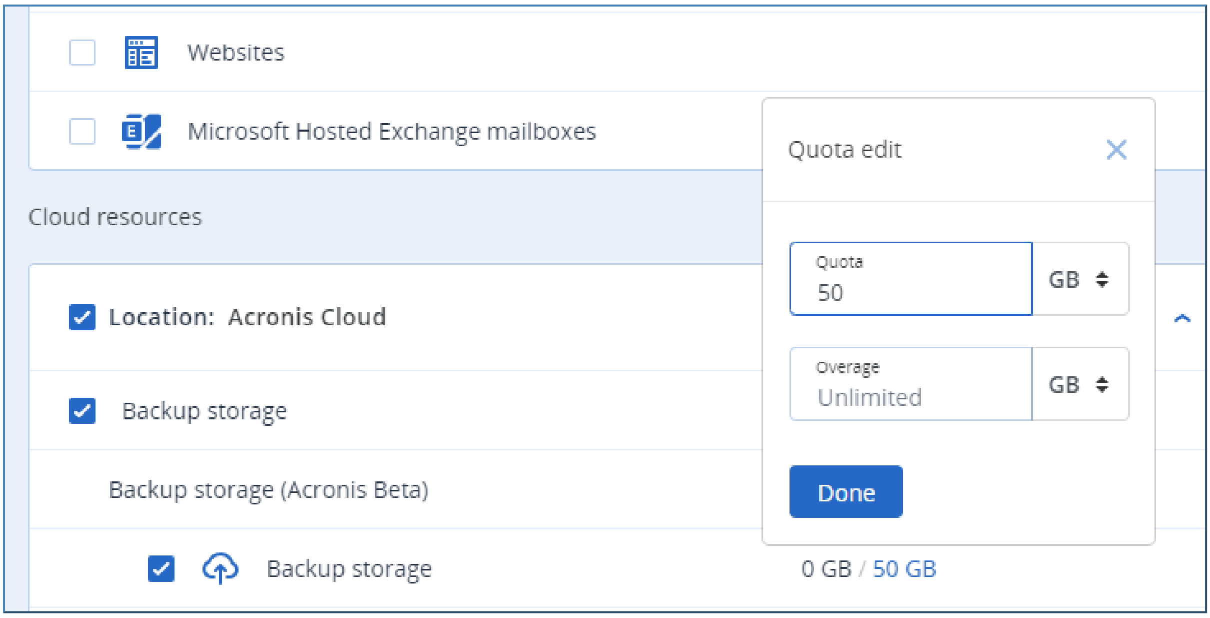
The recurring invoice should look the below illustration:



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

During Acronis quota sync, the integration detects this recurring invoice lines configuration. Next, it will set the OI quota to 50 with overage = unlimited for the mapped Acronis customer tenant.



□ Websites

□ Microsoft Hosted Exchange mailboxes

Cloud resources

☑ Location: Acronis Cloud

☑ Backup storage

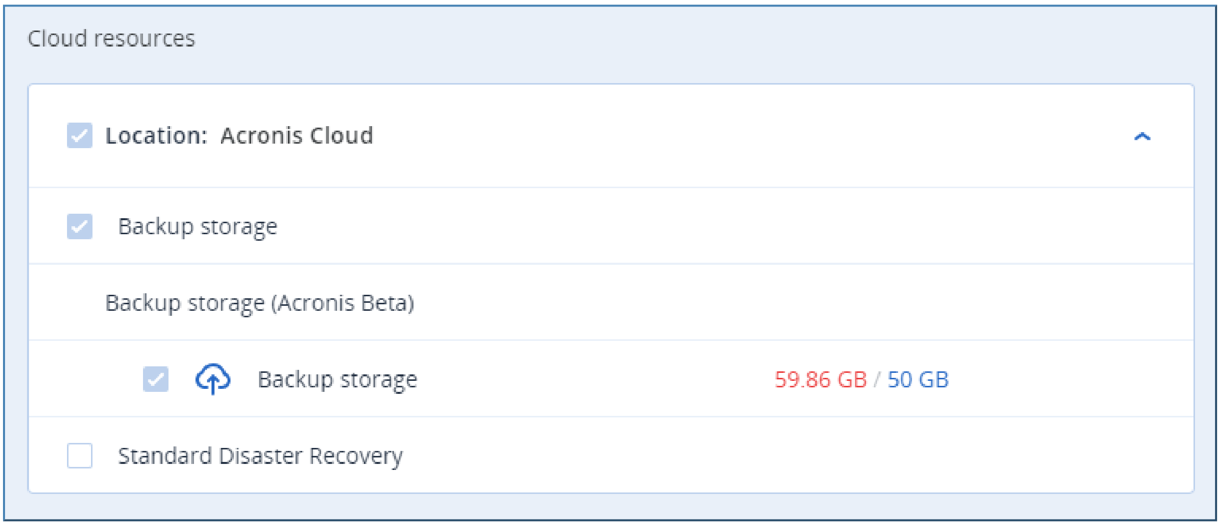
Backup storage (Acronis Beta)

☑ Backup storage 0 GB / 50 GB

Quota edit

Quota: 50 GB

Overage: Unlimited GB



Cloud resources

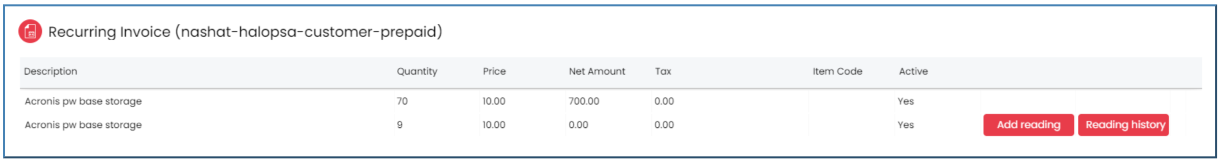
☑ Location: Acronis Cloud

☑ Backup storage

Backup storage (Acronis Beta)

☑ Backup storage 59.86 GB / 50 GB

□ Standard Disaster Recovery



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	9	10.00	0.00	0.00		Yes	Add reading Reading history

During usage sync:

- If there is any usage above the quota, it will take the overage amount and add an extra charge to the recurring invoice.
- If there is no usage above the quota, it will remove any additional overage charge.

Use case 4: Selling mixed scenarios

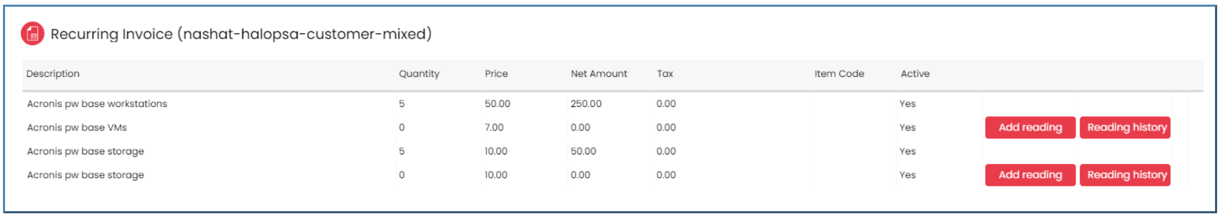
It is possible to combine all PREPAID and PAYG services for two recurring invoices.

For example, suppose you want to sell a HaloPSA customer the following services:

- 5 prepaid workstation slots
- Pay-as-you-go VM protection
- 5 GB of backup storage with overage option

Here is what you should do in HaloPSA:

1. Create a **Recurring Invoice** and make it **Active**.
2. Add **Acronis pw base workstation** recurring item to the invoice and set the quantity to 5 to indicate that this is a PREPAID line.
3. Add **Acronis pw base VMs** recurring item to the invoice and set the **Is Meter** flag to **true** 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 set the **Is Meter** flag to **true** to indicate that this is a PAYG line.
6. Make the recurring items **Active**.



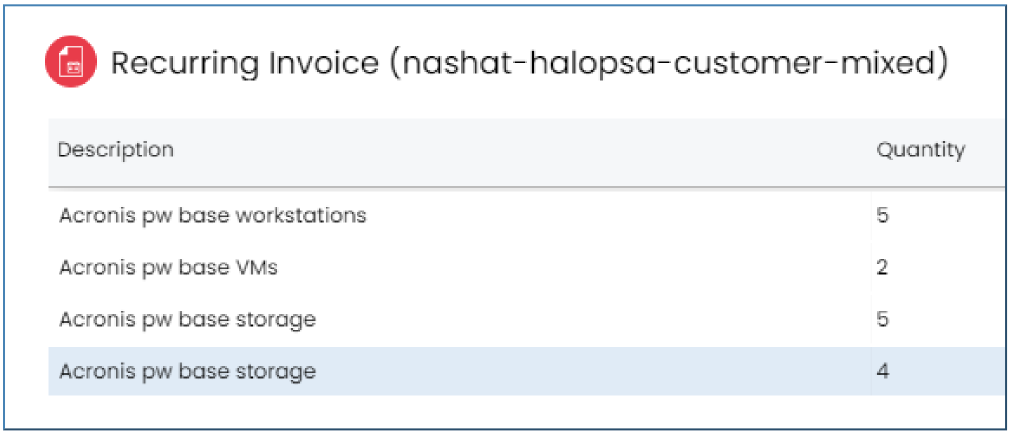
Recurring Invoice (nashat-halopsa-customer-mixed)

Description	Quantity	Price	Net Amount	Tax	Item Code	Active		
Acronis pw base workstations	5	50.00	250.00	0.00		Yes		
Acronis pw base VMs	0	7.00	0.00	0.00		Yes	Add reading	Reading history
Acronis pw base storage	5	10.00	50.00	0.00		Yes		
Acronis pw base storage	0	10.00	0.00	0.00		Yes	Add reading	Reading history

On Acronis side, the integration detects this recurring invoice lines configuration. It will configure customer OIs 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

At the end of the billing period, if the customer has 2 protected VMs and 9 GB storage (4 above the quota), the invoice will be updated as shown below:



Recurring Invoice (nashat-halopsa-customer-mixed)

Description	Quantity
Acronis pw base workstations	5
Acronis pw base VMs	2
Acronis pw base storage	5
Acronis pw base storage	4

Tickets synchronization flow

Once you're done with mapping customers and alert mapping configuration, the integration will continue with ticket creation and synchronization between Acronis and HaloPSA. All standard Acronis alerts can trigger ticket creation except for the ones, configured in the Monitoring plans of the Advanced Management pack. The minimum requirement is to have at least one linked customer and a single linked alert in order to have a fully functional ticket generation.

Different synchronization flows exist, depending on the integration configuration. The next sections describe the possible scenarios.

Generating tickets in HaloPSA

This scenario is active as long as the ticket creation feature is enabled on the **Integration settings** tab. Generating tickets in HaloPSA has the following preconditions:

- Acronis alerts are enabled and mapped from the **Ticket creation** tab
- Acronis customer tenants are mapped to HaloPSA customers
- Mapped Acronis customer tenants always have at least a single protected workload
- The protected workload encounters a problem, which raises the alert, mapped in step 1.

When these conditions are satisfied, the integration does the following:

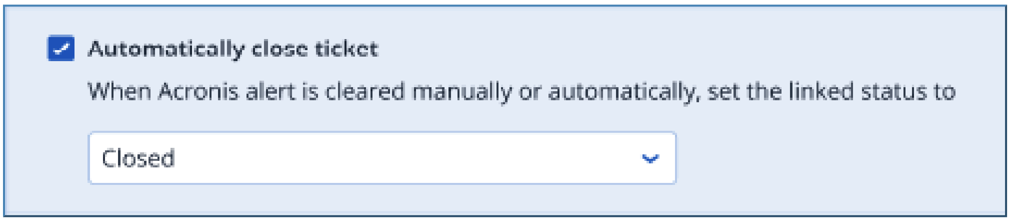
- Creates a ticket in HaloPSA
- The **Brief Description** field is set to the alert title
- The **Type**, **Status**, **Category**, **SLA** and **SLA Priority** fields are set, according to the mapped alert configuration
- The **Internal Comments** field is set to the alert details
- The **Account Number** field is set to the mapped HaloPSA customer.

Resolving tickets in HaloPSA

In this scenario, the integration can resolve a linked ticket in HaloPSA when the originating Acronis alert has been already cleared.

By default, this option is disabled. To turn it on:

1. Go to the **Integration settings** tab.
2. Locate the **Tickets** section and click **Edit** in the top right.
3. Enable the **Automatically resolve ticket** option.
4. Use the **Status** drop-down list to select the desired value for setting the ticket to resolved state.



☑ Automatically close ticket

When Acronis alert is cleared manually or automatically, set the linked status to

Closed

Once enabled, the following conditions are satisfied:

- An alert is raised on Acronis side.
- A ticket has been created in HaloPSA.
- The alert is cleared in Acronis (either manually or automatically).

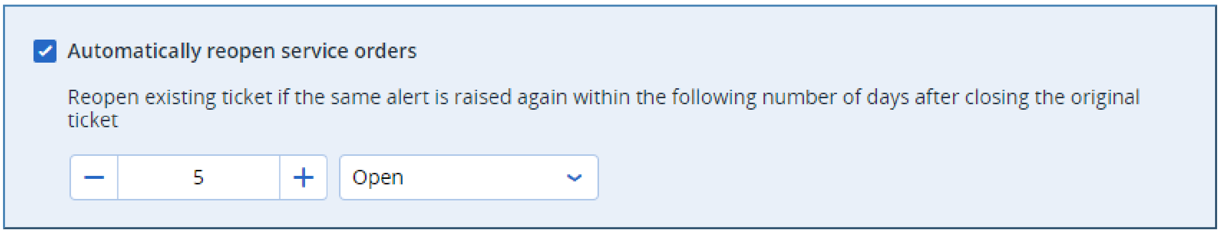
In this case, the integration resolves the ticket automatically by setting the **Status** field to the value, selected from the drop-down.

Reopening tickets in HaloPSA

In this scenario, the integration can reopen an already resolved ticket within a certain period of time after the resolution.

By default, this option is disabled. To turn it on:

1. Go to the **Integration settings** tab.
2. Locate the **Tickets** section and click **Edit** in the top right.
3. Enable the **Automatically reopen ticket** option.
4. In the **Days** numeric field, set maximum number of days that should have passed after closing the ticket and before the integration creates a new one.
5. Use the **Status** drop-down list to select the desired value for setting the ticket to reopen state.



☑ Automatically reopen service orders

Reopen existing ticket if the same alert is raised again within the following number of days after closing the original ticket

Once enabled, the following conditions are met:

- An alert is raised in Acronis.
- A ticket has been created in HaloPSA.
- The ticket has been resolved and the alert - cleared on Acronis side.
- The same alert is raised again.
- The number of days passed since the original ticket has been resolved are less than those configured in the above option.

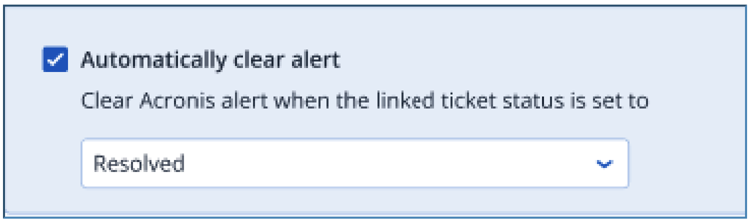
In this case, the integration will not create a new ticket for the alert, but rather reopen the closed one, setting the **Status** field to the drop-down option value. If the number of days passed since the original ticket has been resolved are more than the number configured in the option above, then a new ticket will be created.

Clearing alerts in Acronis

In this scenario, the integration can clear an originating Acronis alert by detecting if linked HaloPSA ticket has been resolved.

By default, this option is disabled. To turn it on:

1. Go to the **Integration settings** tab.
2. Locate the **Tickets** section and click **Edit** in the top right.
3. Enable the **Automatically clear alert** option.
4. Use the **Status** drop-down list to select a value for the ticket status to clear the Acronis alert.



☑ Automatically clear alert

Clear Acronis alert when the linked ticket status is set to

Resolved

Once enabled, the following conditions are true:

- An alert is raised in Acronis.
- A ticket has been created in HaloPSA.
- The ticket status has been changed to the value, configured in the drop-down list above.

In this case, the integration will clear the originating Acronis alert.