# Acronis Data Cloud

ConnectWise Manage Integration

QUICK START GUIDE

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# 1 Introduction

This document describes how to integrate Acronis Data Cloud ("the cloud platform") with ConnectWise Manage.

The integration allows the following:

- Provisioning of the cloud platform services to new and existing ConnectWise Manage customers from the ConnectWise Manage console.
- Automatic creation of tickets for backup, recovery, or quota-related issues in the ConnectWise Manage console.
- Automatic billing of backup customers in the ConnectWise Manage console, based on their usage of the cloud platform.

# 2 Activating your account

Before setting up the integration, please obtain an Acronis Data Cloud account directly from Acronis or from a partner sales representative. To obtain an account from Acronis, go to https://www.acronis.com/provider/backup-cloud, choose your region if asked, and then click **Request a Quote**.

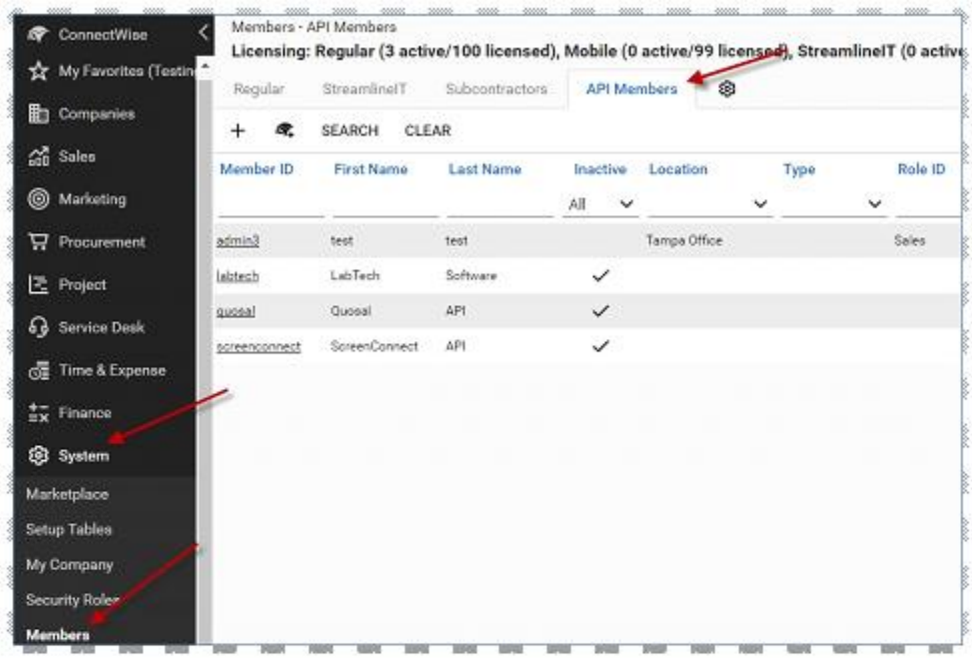
After signing the partnership agreement, you will receive an email message containing the following information:

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

# 3 Configuring ConnectWise Manage

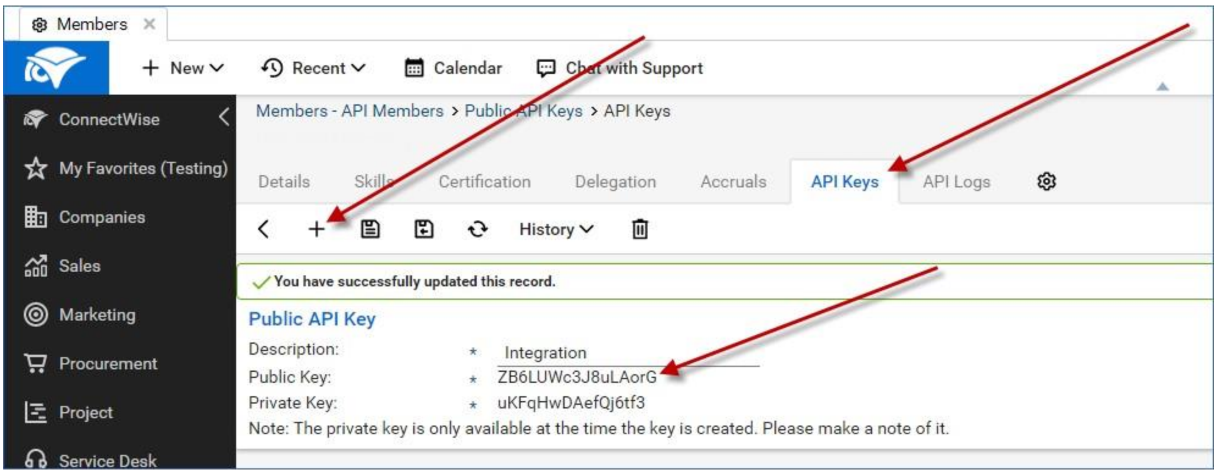
Before setting up the integration, do the following:

1. Open the ConnectWise Manage console and log in.
2. Go to **System** > **Members** > **API Members**.




*This API member does not use a Manage User License.*

3. Click **New**.
4. Fill out the required information and set the **Role ID** to **Admin**.
5. Save the API member.
6. Navigate to the **API Keys** tab.
7. Create a new API key and give it a name that will identify your integration.
8. Copy the public and private keys.




*The public key will no longer be available once you leave this screen.*

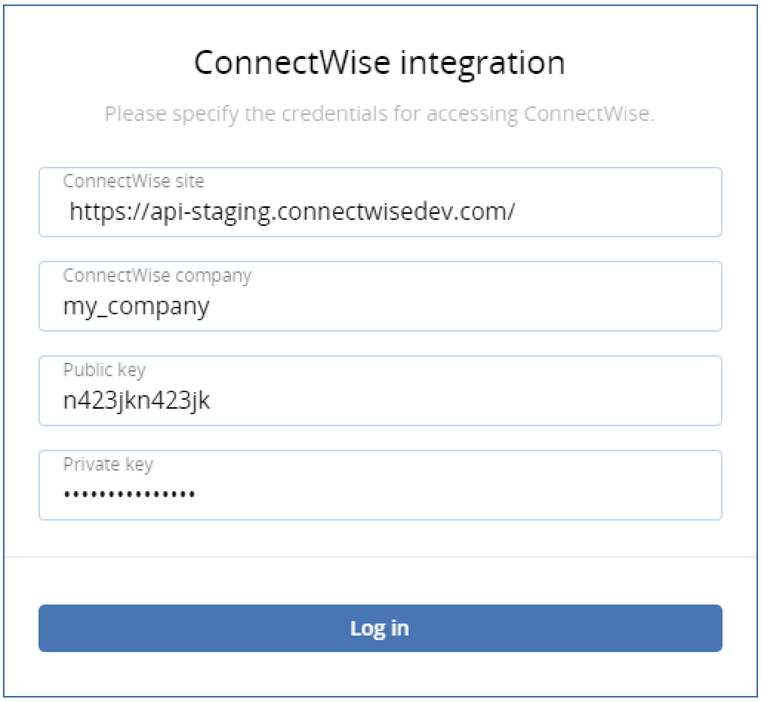
9. Click **Save**.
10. Navigate to the **Procurement Module** and select **Products**.
11. Add new products for the offering items of the cloud platform services that you plan to sell.

    For each offering item, you will be able to set quotas, collect quota usage statistics, and set up customer provisioning.

# 4 Setting up the integration with ConnectWise Manage

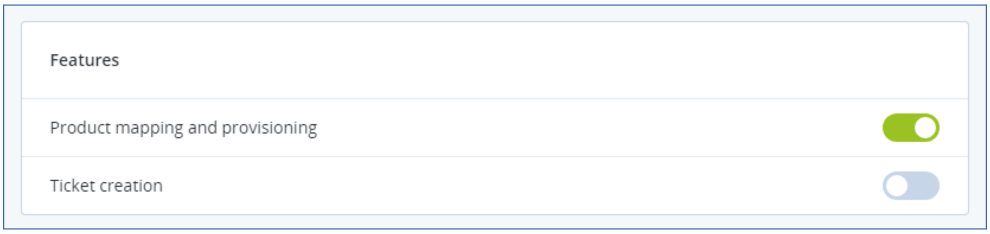
1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **ConnectWise Manage**.
3. Specify your ConnectWise site, company name, and API keys.
4. Click **Log in**.



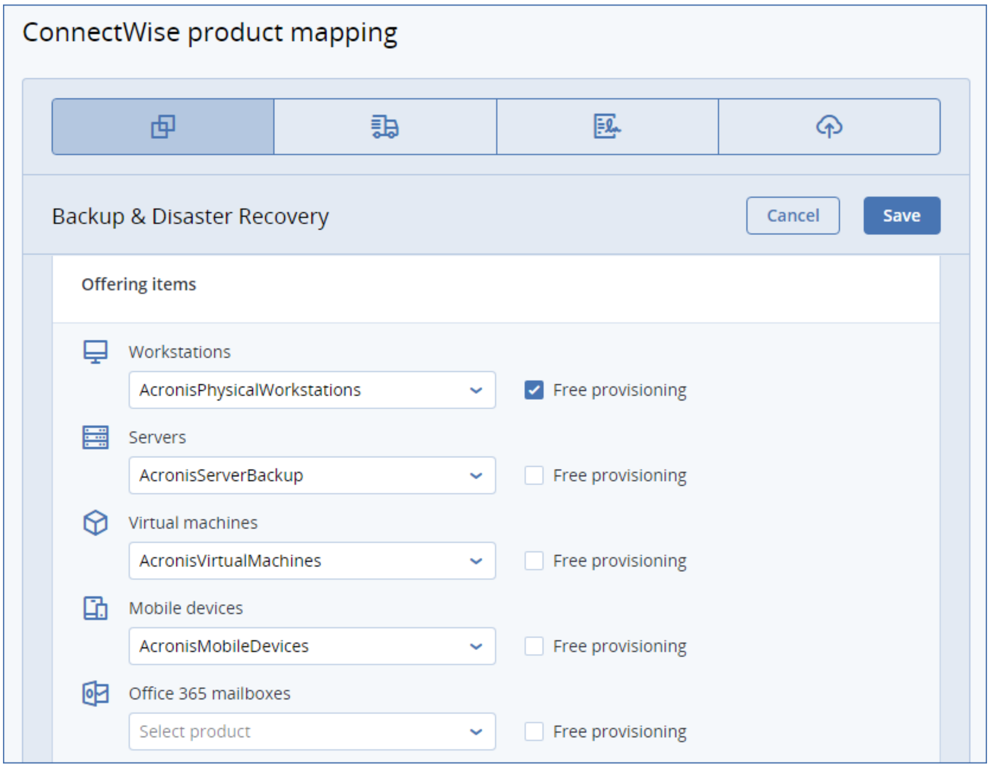
# 5 Configuring the product mapping and provisioning

1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **ConnectWise Manage integration status**) > **Settings** > **Integration settings**.
3. Toggle the **Product mapping and provisioning** switch.



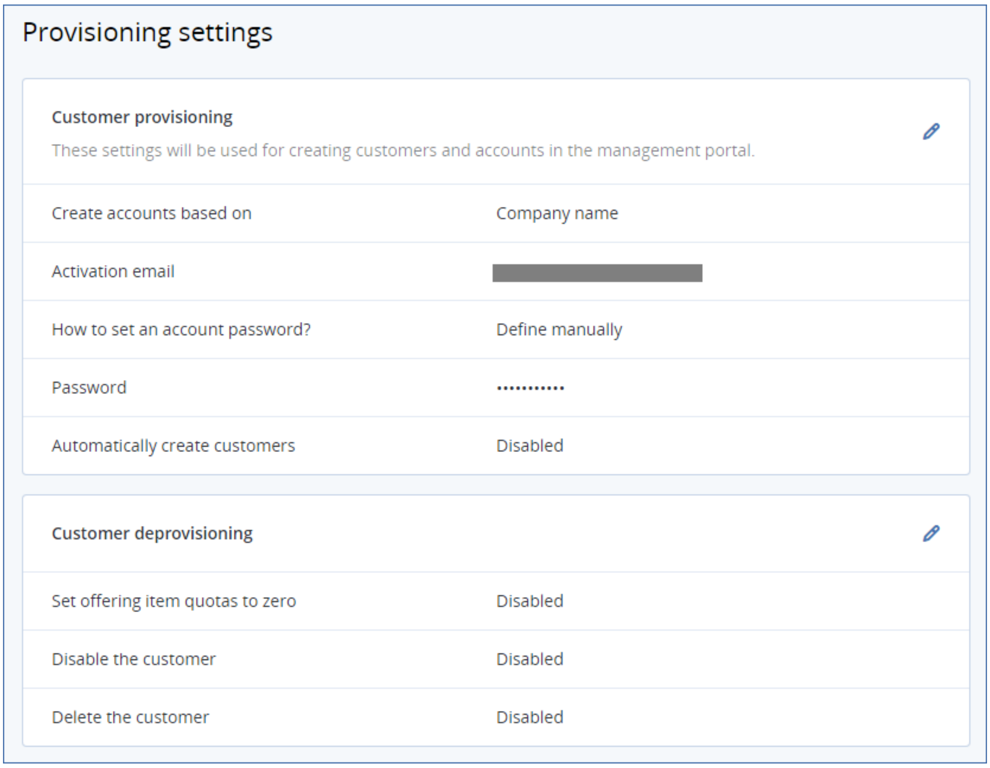

4. Go to the **Product mapping** tab.
5. Click the necessary service tab, and then click **Edit**.
6. Select the corresponding ConnectWise Manage product for each of the offering item.

   If a product is not selected, the offering item quota will be set depending on the **Free provisioning** option. If **Free provisioning** is disabled, the quota will be set to zero. If **Free provisioning** is enabled, the quota will be set to unlimited.
7. Click **Save**.



8. [Optional] Go to the **Provisioning** tab and configure the customer provisioning and deprovisioning by clicking the pen icon and changing the settings in the corresponding sections.




The synchronization between the cloud platform and ConnectWise Manage may take up to 15 minutes.

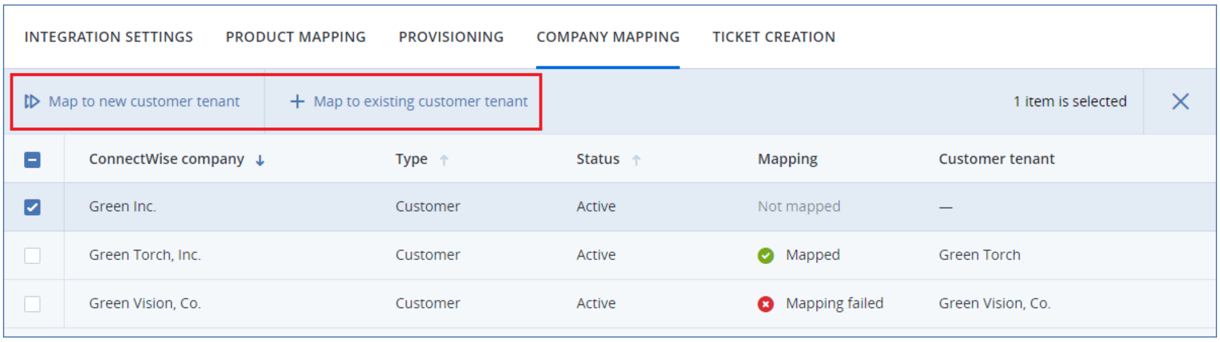
 

# 6 Configuring the company mapping

To map a customer in the cloud platform to a company in ConnectWise Manage, start provisioning, or remove mapping, do the following:

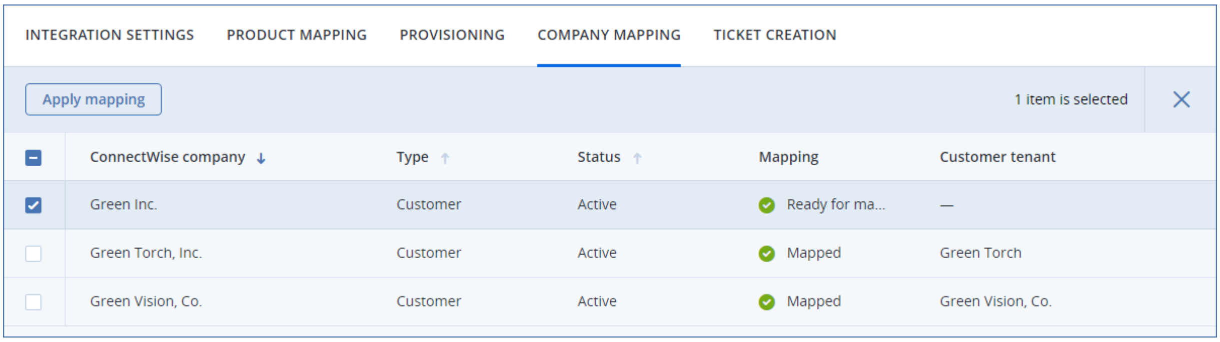
1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **ConnectWise Manage integration status**) > **Settings** > **Company mapping**.
3. Select ConnectWise Manage companies.

   Use the **Search** field and the **Filters** button to search for specific companies.
4. Click the corresponding action in the upper panel.



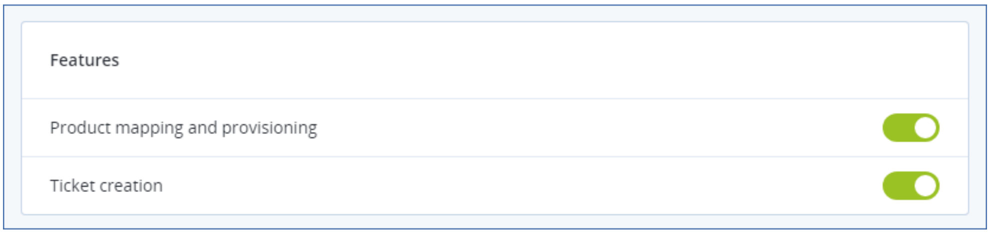

5. Click **Apply mapping**.

   The synchronization between the cloud platform and ConnectWise Manage may take up to 15 minutes.

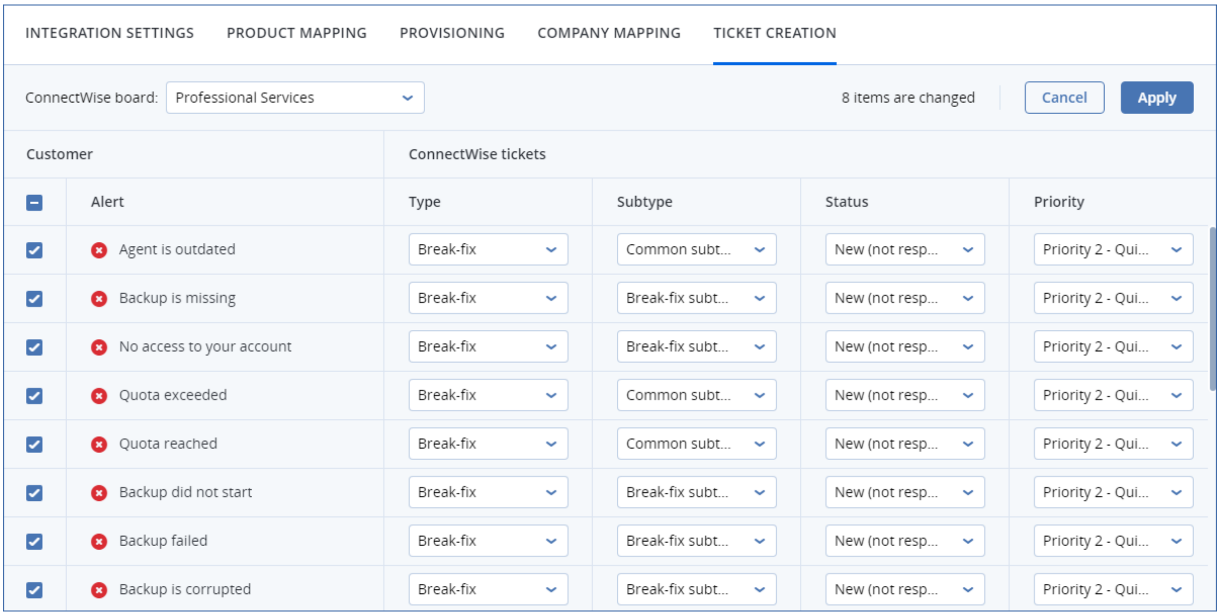


# 7 Enabling automatic creation of tickets

1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **ConnectWise Manage integration status**) > **Settings** > **Integration settings**.
3. Toggle the **Ticket creation** switch.



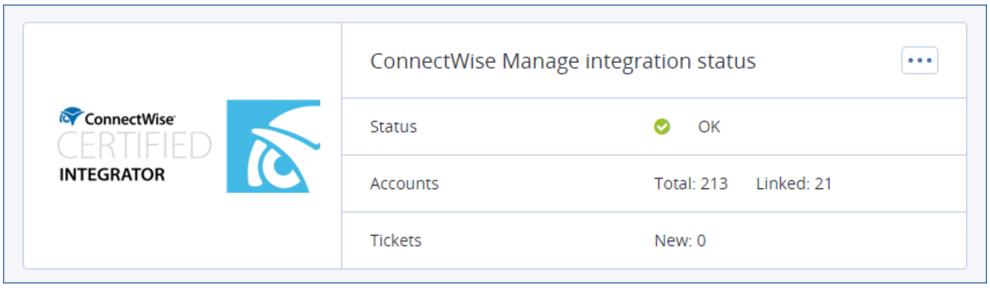

4. Go to the **Ticket creation** tab, and then click **Edit mapping**.
5. Select a service board and configure the mapping for each of the customer alert.
6. [Optional] Click **Settings** and configure the following:
   - If you want to create a new ticket for a mapped alert every time the initial ticket for this alert has been closed for a specific number of days, select the **New ticket creation** check box, and then specify the number of days. Otherwise, the initial ticket will be re-opened on every occurrence of the alert.
   - If you want to automatically close tickets originated from alerts when issues that generated these alerts are resolved, select the **Tickets auto-closing** check box, and then select the status that will be assigned to a closed ticket in ConnectWise Manage.
7. Click **Apply**.



# 8 Viewing the integration summary

1. Log in to the management portal.
2. Go to **Settings** > **Integration**.

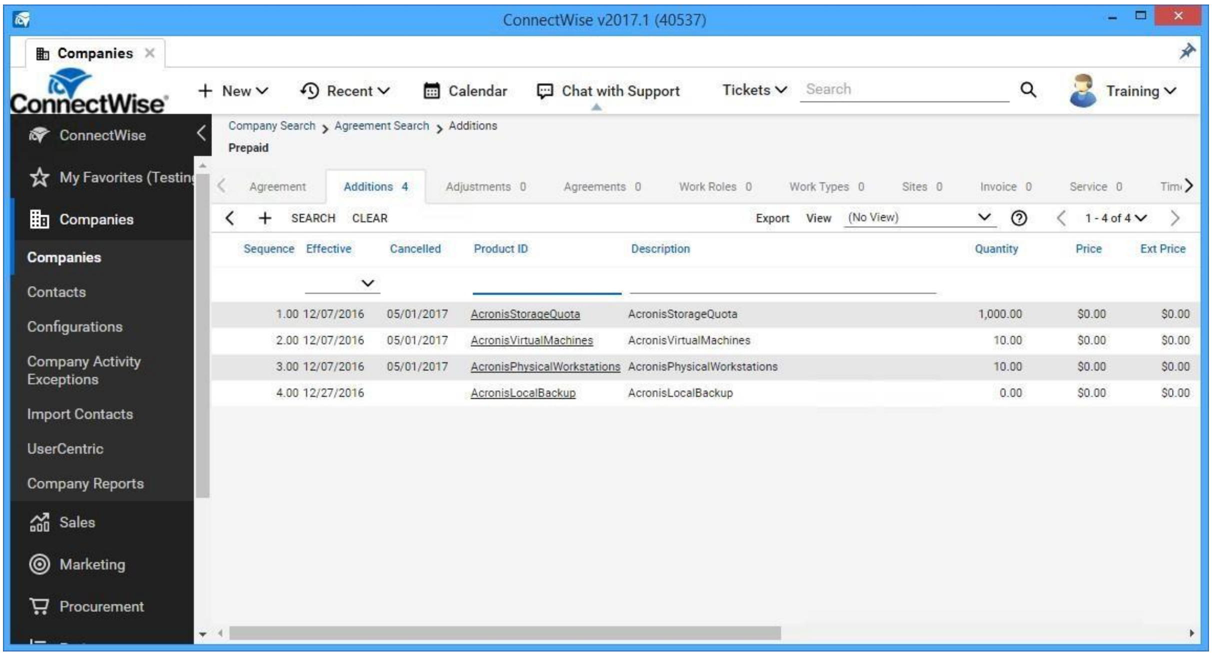
The information about the integration status will appear.



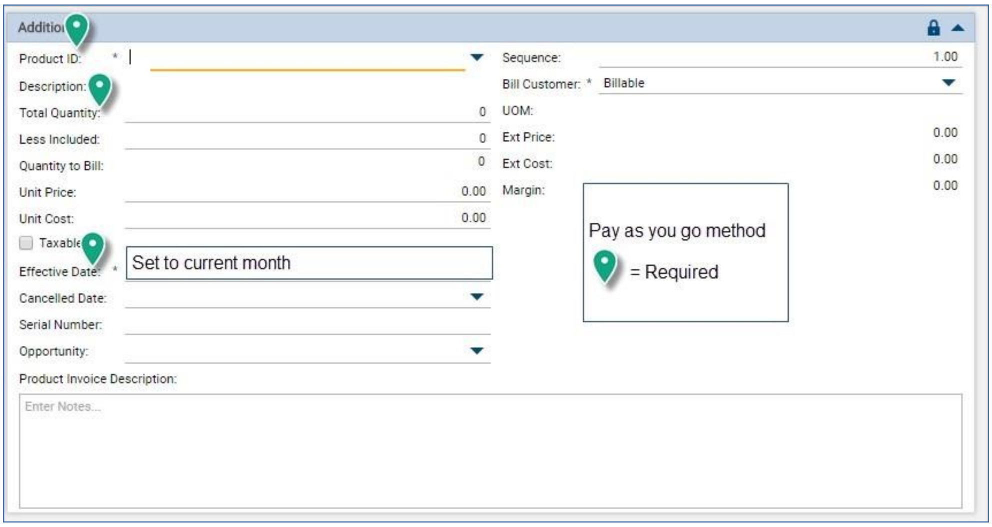
# 9 Company provisioning

To set up automatic provisioning of customers in the cloud platform:

1. Open the ConnectWise Manage console.
2. Go to ConnectWise Manage Agreement and add the products (additions) that you have selected for offering items in the "Configuring the product mapping and provisioning" (p. 7) section.

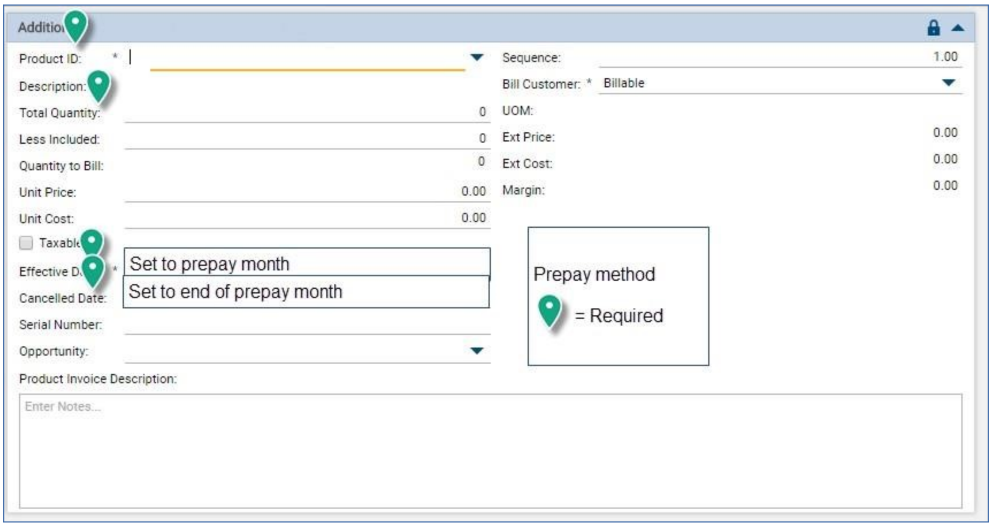



The settings required for the pay-as-you-go billing.



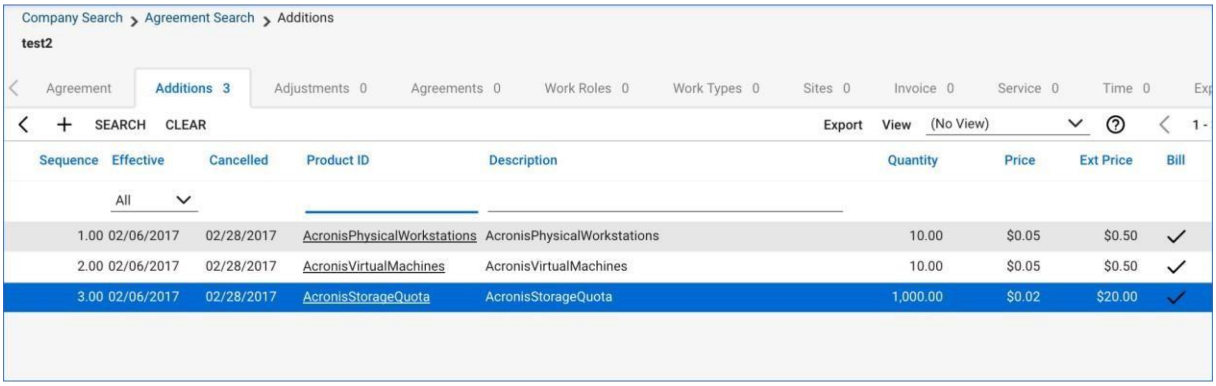

 

The settings required for the prepaid billing.




The following rules are used for offering item quota setup and usage synchronization:

1. For all prepaid additions, offering item quotas will be set up based on the **Total Quantity** field.
2. ConnectWise Manage does not sync the usage for offering item quotas that were created based on prepaid additions.
3. For all pay-as-you-go additions, offering item quotas will be set to **Unlimited**.
4. Usage for offering item quotas that were created based on pay-as-you-go additions is synced to the **Total Quantity** field of the corresponding additions.
5. If you want to see usage for prepaid additions, please combine prepaid additions and pay-as-you-go additions under the same product. In this case, the **Total Quantity** field for pay-as-you-go additions will show common usage.
6. Save the settings.



# 10 Viewing tickets originated from customer alerts

1. Open the ConnectWise Manage console.
2. Go to **ConnectWise Manage Console** > **Service Board.**
3. Select the service board used for the integration.