

Acronis

# Acronis Advanced Automation onboarding service

Onboarding service is available in English, German, Italian, Spanish and French languages

The onboarding service for [Acronis Advanced Automation](#) is designed to ensure our MSP partners can quickly and accurately configure the solution to:

- Increase revenue and profitability.
- Enhance operational efficiency.
- Streamline resource management.
- Gain a 360-degree overview of business operations and key business KPIs.

MSPs that fully adopt the Acronis Advanced Automation solution typically report these outcomes, among others:

Up to a  
**10%**

**increase in  
profitability**

Up to a  
**30%**

**increase in revenue from  
billable ticket time**

Up to a  
**30%**

**improvement in  
timesheet accuracy**

As with any business automation solution, proper implementation is key for maximizing effectiveness, enhancing profitability and improving workflow management. To ensure that partners spend as little time as possible on configuration and adoption, and to seek the shortest route to value, Advanced Automation includes a mandatory onboarding service. This professional service, conducted by Acronis experts, will ensure your implementation is executed optimally with minimal friction and distraction from day-to-day operations.

During the onboarding process, we ensure the following system components are properly enabled:

➤ **Service desk and ticketing**

➤ **Time tracking**

➤ **Timesheet management**

➤ **CRM, including contracts  
and quotation management**

➤ **Billing and invoicing**

➤ **Financial and service desk  
KPI reporting**

## Scope of onboarding service

The scope of the onboarding service includes:

- Review of existing business processes.
- Identification of gaps and operational pain points.
- Guided setup of Advanced Automation modules.
- Data import from 3rd party systems.
- Configuration fine-tuning.
- Initial testing.
- One-hour live online training for the entire team.
- One-hour 1-on-1 KPI and data review — two months after completing the onboarding



Typically, onboarding services are provided in three sessions, each focused on a specific product module:

### Session one: Introduction and data imports

- Define the onboarding plan.
- Activate integrations for accounting, RMM and payment systems.
- Set up email server integration.
- Configure user roles and import initial data.

### Session two: Sales and billing

- Set up default billing rules and payment terms.
- Customize invoice templates and notifications.
- Configure taxes, ledgers, default products and custom prices.
- Set up contracts for the first client.
- Conduct a test billing run and invoice exports.

### Session three: Service desk and time management

- Set up default service desk settings, including SLAs and ticket priorities.
- Configure ticket priorities, categories and statuses; set up user groups.
- Create email templates and notifications.
- Conduct tests on ticketing and time-tracking systems

## Elevate your MSP business with Acronis Advanced Automation

Our onboarding service is more than a setup procedure; it's designed to integrate Acronis Advanced Automation deeply within your business fabric. By adhering to the outlined prerequisites and engaging with our expert-led sessions, you're setting the stage for unmatched operational efficiency and profitability, ensuring the shortest route to value with minimal distraction from your day-to-day operations. Contact your partner success manager to get started.

To order the onboarding service,  
please click on this button

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