



SONICWALL®

SonicPlatform
Administration Guide

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Overview

The SonicPlatform is a web-based innovative management platform designed to unify SonicWall products into a single integrated interface. The SonicPlatform is not only focused on streamlining management tasks but also delivers deep product integration that enables the sharing of contextual information across all enforcement points.

SonicPlatform gives you everything you need for management:

- Comprehensive visibility and
- Granular control and the capacity to govern the entire SonicWall network security operations with a greater clarity, precision, and speed.

The SonicPlatform is built to deliver a vision of comprehensive, intuitive, and unified management that greatly simplifies the oversight of cloud-based and on-premises infrastructures.

SonicWall has added numerous security and networking solutions, including Endpoint security, Wireless access, Cloud Email Security, and threat intelligence, along with its recent additions of Cloud Secure Edge (a Cloud-delivered ZTNA solution as a service), and managed security services, such as Managed Detection and Response (MDR).

This platform is especially beneficial for MSPs, enabling them to manage multiple client environments, automate key tasks efficiently, reduce operational costs, enhance service delivery, and garner valuable insights—all through a single, user-friendly interface.

The SonicPlatform serves as a centralized hub for managing all client resources, with key features such as:

- **Unified Console:** A single, intuitive interface for managing all clients and their resources.
- **Unified System Health Visibility:** Comprehensive insights into the health and performance of clients' products – including maintenance needs.
 - Unified alerts
 - Unified Inventory management
 - Simplified onboarding of new partner, customer, product, and services.
- **Enhanced Security Management:** Advanced capabilities for detecting and mitigating threats.
- **Expanded Inventory Management:** Efficient management of clients' resources, including appliances, subscriptions, and licenses across on-premises and cloud environments.

This security management platform provides a SaaS (Software-as-a-Service) offering for ease of deployment.

The SonicPlatform is accessible on-demand, through the cloud, virtually with unlimited system scalability to support multiple tenants with thousands of security nodes under each one. The solution's redundant and distributed architecture enables organizations to centrally and reliably manage a single small network to one or more enterprise-class deployments with the flexibility to scale without increasing management and administrative overhead.

Sign Up for SonicPlatform

Sign up for the SonicPlatform at <https://platform.sonicwall.com>. When you sign up for the SonicPlatform account, a new Organization Account is created with a unique ID.

Account Settings

From the **My Account**, you can update **MY PROFILE**.

The **MY PROFILE** is further categorized into:

- **Organization Settings**
- **Personal Settings**

Organization Settings

Common settings that must be applied and maintained throughout the organization are grouped under **Organization Settings**. Only the **Super Admin** of the Organization Account can change the Organization settings.

Organization Information

Organization ID: A unique ID of the account that was generated during sign-up.

Company Name and Address: Super Admin can modify the Company Name and Address.

Organization Domain

The Super Admin can update the domain. For more information, refer to [Updating Domain of the Organization Account](#).

Organization Options	This category includes Enforce 2 Factor Authentication and Configure External IDP to connect to resources. The individual user must configure the Personal Settings based on the Organization Options preference set by the Super Admin.
Preferred Data Center	Super Admin can select the preferred data center from the drop-down menu.
Renewal Days	By the default, the Renewal Days are set to 365 days. The Super Admin can edit and update the number between 1 to 365 days.
Set Inactivity Timeout	The default Set Inactivity Timeout is 240 minutes. The Super Admin can modify this value to 15 to 240 minutes.
Tax Information	The Super Admin can add or remove the tax information.
Distributor Information	The Super Admin can add or remove the distributor information.
Renewal Contacts	The Super Admin can add or remove the renewal contact to manage notifications, alerts, and renewal workflows.

Updating Domain of the Organization Account

① NOTE:

- Changing domain is recommended only when acquired a new organization or for any big organization change.
- Only the **Super Admin** can update the Organization Account domain.

Existing employees with the old domain continue to work as-is. Employees belonging to the other domain, cannot be added to the Organization Account. All employees of the Organization Account get an email notification if any changes are made to the domain.

To update domain of the organization's account:

1. Login to **SonicPlatform**.
2. Navigate to **My Account > MY PROFILE**.
3. Click the **Edit** icon of the **Organization Domain**.
4. Enter the new domain to be added.
5. Click **Save**.

Personal Settings

Settings related to individual users are grouped under Personal Settings. From Personal Settings, logged-in users can:

- Update Email Address and Password
- Edit the personal Name and Address of the logged-in user
- Configure **Organization Options** enforced in the **Organization Settings**
- Set the Time Zone
- Enable pre-release access
- Define Alert Settings

The screenshot shows the 'Personal Settings' page with the following sections:

- ACCOUNT ACCESS**: Fields for Email Address (example@company.com) and Password (password).
- PERSONAL INFORMATION**: Fields for Name (John Doe) and Address (123 Main St, Suite 100, San Francisco, CA 94105).
- 2 FACTOR AUTHENTICATION WISE**: Radio buttons for Email (selected) and Microsoft Authenticator app.
- TIME ZONE**: Dropdown menu showing 'Pacific Standard Time (GMT-08:00)'. Below it is a toggle for 'EARLY ACCESS' (currently off).
- ALERT SETTINGS**: A table for 'Email Subscriptions' with columns 'In-app' and 'Email'.

	In-app	Email
New Software and Firmware Updates	☐	☐
New Product and Feature Releases	☐	☐
Security and Vulnerability Updates	☐	☐
Product Security/Support Updates	☐	☐
General System and API (Developer)	☐	☐
Security Notifications	☐	☐

Organization Account

When you sign up for a new account, an account is created with a new Organization Account structure with a unique organization ID. The Organization Account follows the below organization structure. P1 has full access to all the organizational resources and P4 has the least access.

- P1: Super Admin
- P2: Admin
- P3: Employee
- P4: Customer

As the signed-up user is the first user of the Organization Account, the Super Admin role is assigned to the signed-up user by the default. The Super Admin can assign the Super Admin role up to four other employees.

SonicPlatform Tour

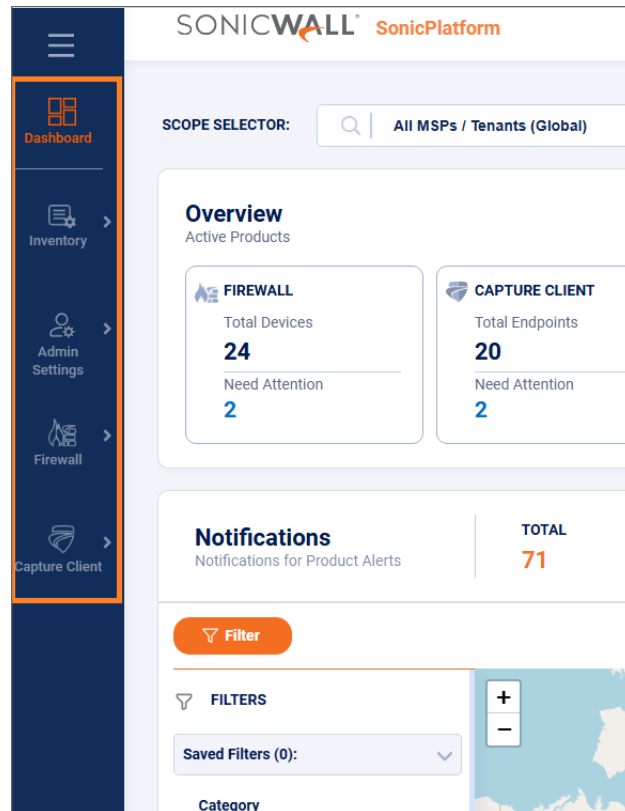
The SonicPlatform is a unified platform for managing all your SonicWall products and services with a single-pane-of-glass experience. The following table provides the information about SonicPlatform navigation.

Left- Navigation Menu

The left-navigation menu shows all SonicWall product offerings.

- Click or hover over the product in the left navigation menu to see the available capabilities under each product category.
- Products with sub-menu can be viewed by hovering over the product.

NOTE: The Product is unavailable for selection if you do not have an active registered product. You can register a product from the **Inventory > All Products / Monthly Subscription**. For more information, refer to [Inventory](#).



Scope Selector

The **Scope Selector** is available only on the Dashboard and Inventory pages.

The **Scope Selector** shows the hierarchy of your organization in terms of the MSPs managed by you (in case you are a Master MSP) and the Tenants under each individual MSP. The main purpose of the Scope Selector is to control the data populated on the Dashboard and Inventory page. The Inventory page only shows the available features for the selected scope.



Dashboard

The **Dashboard** is the default page of the SonicPlatform when you log in.

The Dashboard summarizes all your registered products and alerts associated with the products according to the **Scope Selector**.

From the **Dashboard**, you can:

- Create a new Tenant
- Manage alerts
- Navigate to Alert List view from the product tiles to view product-specific alerts generated.

i NOTE: If you do not have a registered product, you have can learn more about the product offerings and activate a trial. For more information, refer to [Dashboard](#). A trial is available only for Firewalls.

Map View

By the default, the Dashboard page shows the alerts in the **Map View**, but you can switch between Map View and List View.

On the Map View, the dot signifies tenants based on their marker locations and color of the dot signifies the highest priority of alert generated on the products under those Tenants.

Applying the combination of filter attributes can narrow down the results for a specific requirement. You can save these combinations of attributes to apply filters for future use. For more information, refer to [Viewing and Managing Alerts](#).

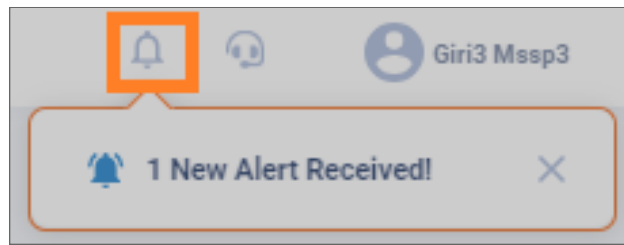
List View

The **List View** gives the complete list of product-wise alerts with separate tabs.

Applying the combination of filter attributes can narrow down the results for a specific requirement. You can save these combinations of attributes to apply filters for future use. For more information, refer to [Viewing and Managing Alerts](#). You can also export the alerts into CSV format.

Notification Center

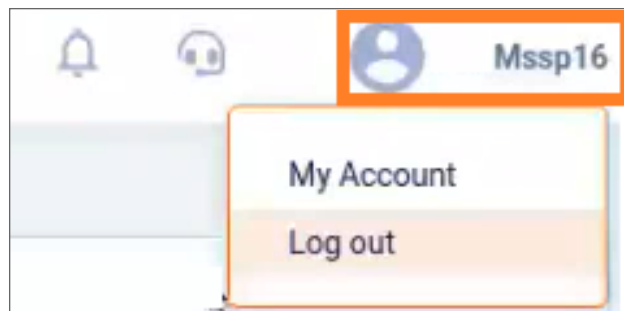
The **Notification Center** gives a quick overview of the alerts and notifications available for your products. You can find the Notification Center icon in the top right corner of the SonicPlatform.



My Account

The **My Account** icon is available at the top right corner of the SonicPlatform. You can customize your organizational and personal account settings here.

Only the Super Admin can change the Organizational Settings. For more information, refer to [Account Settings](#).



Dashboard

The **Dashboard** gives the overview of all your SonicWall products and associated alerts. Overview of the **Dashboard** changes based on the role of the logged-in user.

If you are a Master MSP, you can see:

- Total MSPs of the logged-in Master MSP
- Need Attention-MSPs (count of MSPs that have alerts on them)
- Total Tenants of the logged-in Master MSP
- Need Attention-Tenants (count of tenants that have alerts on them)

If you are an MSP or Customer, you can see:

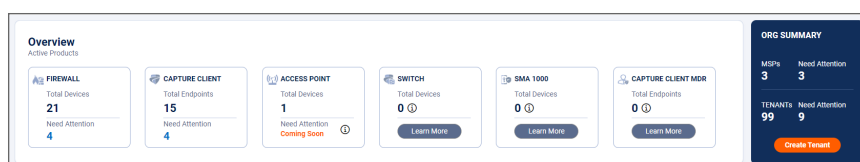
- Total Tenants
- Need Attention-Tenants (count of tenants that have alerts on them)

The Dashboard information changes with a scope change in **SCOPE SELECTOR**.

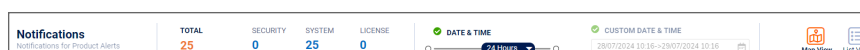
NOTE: If you do not have an active registered product, you can learn more about the product offerings and activate a trial from the Dashboard tiles.

From the **Dashboard**, you can get:

- The overall visibility of the product-wise registered units on the **Overview** dashboard.



- The number of alerts waiting for your attention on the **Notifications** dashboard.
 - Total alerts
 - Product-wise alerts
 - Category-wise alerts



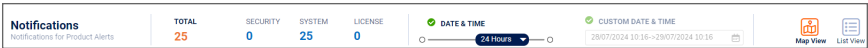
From the **Dashboard**, you can perform the below-listed operations:

- Provisioning a Tenant
- Viewing and Managing Alerts
 - Filtering Alerts
 - Saving Alerts Filter
 - Exporting Alerts

Viewing and Managing Alerts

You can view and manage 7 days of unified alerts data for all your products from the **Notifications** dashboard. Alerts are shown in the **Map View** by the default, but you can switch between the **Map View** and **List View**

The **Notifications** dashboard shows the total number of alerts for all products and Category-wise alerts up to the 7-day range. The SonicPlatform defines the alerts based on the **Category** type and **Priority** of the alert. For more information, refer to **Definition of Alerts**.



Topics:

- Definition of Alerts
- Color Code of the Alerts
- Map View
- List View
- Filtering Alerts
- Saving Alerts Filter
- Deleting Saved Filters
- Exporting Alerts

Definition of Alerts

The SonicPlatform defines the alerts based on the **Category** type and **Priority** of the alert.

Alert Category	Security
	System
	License

Alert Priority	Emergency
	Critical
	Alert
	Error
	Warning
	Notice
	Info
	Debug

Color Code of the Alerts

Priority alerts are further grouped based on the criticality and indicated with a color code on the **Map View**.

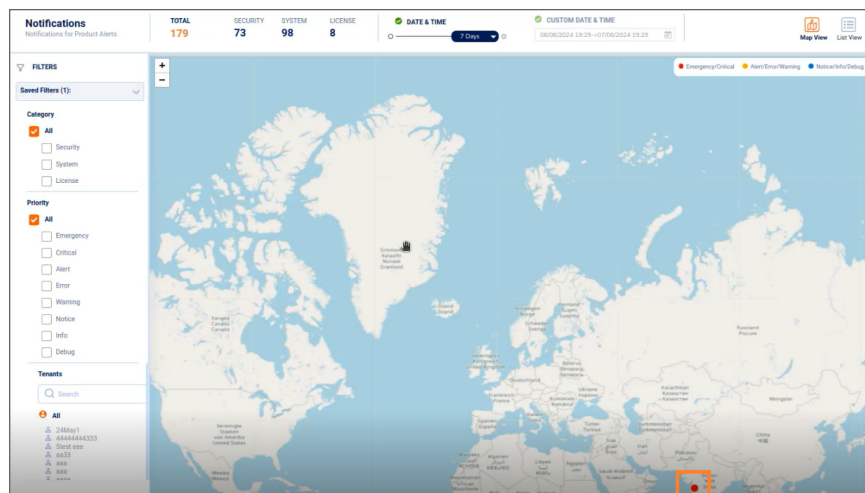
Color of the Alert	Priority Type		
Red	Emergency	Critical	
Orange	Alert	Error	Warning
Blue	Notice	Info	Debug

Map View

In the **Map View**, alerts are shown on the map based on the geographical location of the tenant with an appropriate color (dot on the map) for active products.

NOTE:

- On the Map View, the position of the dot signifies tenants based on their marker locations, and the color of the dot signifies the highest priority of alert generated on the products under those Tenants. For more information, refer to **Color Code of the Alerts**.



To view alerts on the Map View:

1. Login to **SonicPlatform**.
2. The **Dashboard** is loaded with the **Map View** by default.
3. In the **Notifications** table:
 - Apply filters as required.
 - Hover over the color dot on the map.

Hovering over the dot on the Map View opens the priority Alerts for products of the Tenant. Clicking the Count of Alerts navigates you to the corresponding filtered product alerts List View by the Tenant.

- Click **View All** to view the complete list of alerts in the **List View**.

List View

The **List View** gives you the complete list of Product-wise alerts with separate tabs.

To view alerts in List View:

1. Login to **SonicPlatform**.
 2. The **Dashboard** is loaded with the **Map View** by default.
 3. Click the **List View** on the top-right corner of the **Notifications** table.
- Product-wise alerts are shown with separate tabs.

LOCAL TIME	FRIENDLY NAME	TYPE	PRIORITY	CATEGORY	TENANT	MESSAGE	STATUS
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD ---	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD ---	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD ---	Online

Filtering Alerts

You can filter the alerts to narrow the list for a specific result by applying a combination of filters, **Category**, **Priority**, and **MSPs/Tenants**.

SonicPlatform alerts are defined based on the **Category** type and **Priority** of the alert. For more information, refer to **Definition of Alerts**.

To filter the alerts:

1. Login to **SonicPlatform**.
 2. Click the **Dashboard** in the left navigation menu.
 3. From the **Notifications** dashboard:
 - a. Set the **Date and Time** slider. You can set it from 60 seconds to 7 days.
- ① | **NOTE:** By the default, the slider is set to 24-Hours.

DATE & TIME

24 Hours

60 Secs

15 Mins

60 Mins

✓ 24 Hours

7 Days

SWITCHES

TURE CLIENT

- b. Set the Customized Date range based on the slider selection in the previous step.

① | **NOTE:** You cannot set the future end date.

CUSTOM DATE & TIME

14/05/2024 17:12->15/05/2024 17:12

MAY 2024

JUNE 2024

START TIME

END TIME

17

Hour

17

12

Min

12

4. Select the filters under each type as required.

By the default, **All** is selected for all filters.

Notifications

Notifications for Product Alerts

FILTERS

Saved Filters (4):

Category

☒ All
 ☐ Security
 ☐ System
 ☐ License

Priority

☒ All
 ☐ Emergency
 ☐ Critical
 ☐ Alert

Based on the **Scope Selector**, filter options are available to narrow down the results based on MSP or Tenant:

All MSPs/Tenants	If you are a Master MSP and the Scope Selector is set to All MSPs / Tenants
Tenants	If you are an MSP and the Scope Selector is set to a particular MSP

All MSPs / Tenants

Q

Search

All

▼

Demo-MSP-A

▼

Demo-MSP-B

▼

SNWL

The Map View or List View gets updated according to the applied filters and set duration.

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Dashboard

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Saving Alerts Filter

You can apply the filters and save these combinations of the filters for future use.

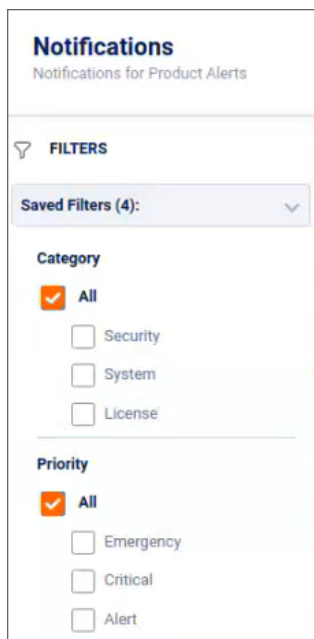
SonicPlatform alerts are defined based on the **MSP/Tenant**, **Category** type, and **Priority** of the alert. For more information, refer to [Definition of Alerts](#).

To save the alerts filter:

1. Login to [SonicPlatform](#).
2. Click the **Dashboard** in the left navigation menu.
3. Select the filters under each type as required.

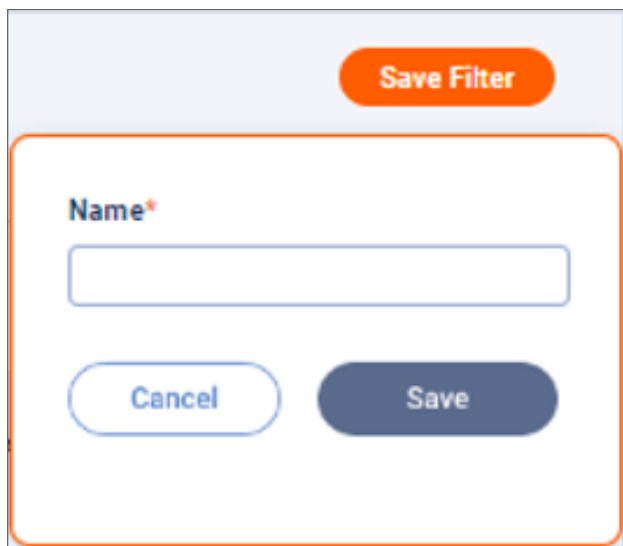
By the default, **All** is selected for all filters. For more information, refer to [Filtering Alerts](#).

When you select a filter, the **Save Filter** option is displayed in the right-most corner of the **Notifications** table.



The screenshot shows a 'Notifications' panel with the subtitle 'Notifications for Product Alerts'. Below this is a 'FILTERS' section with a funnel icon. A dropdown menu labeled 'Saved Filters (4):' is visible. Under the 'Category' heading, there are four options: 'All' (selected with an orange checkmark), 'Security', 'System', and 'License'. Under the 'Priority' heading, there are three options: 'All' (selected with an orange checkmark), 'Emergency', 'Critical', and 'Alert'.

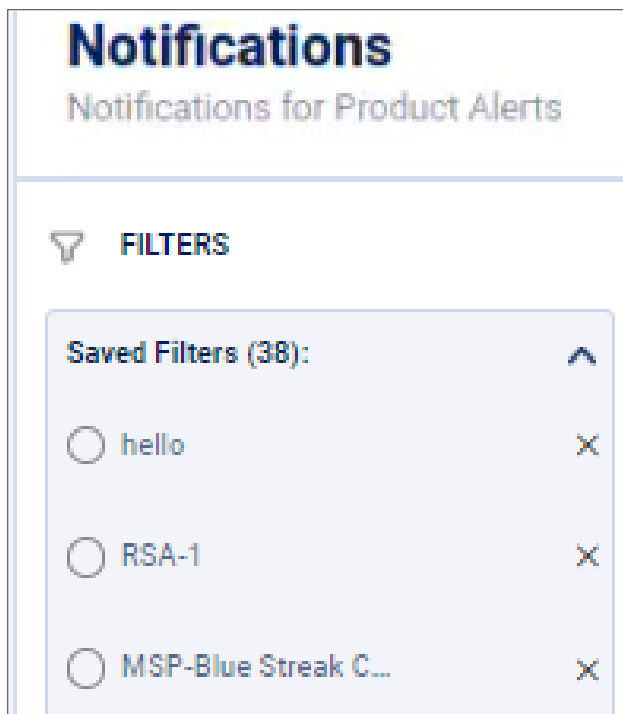
4. Click the **Save Filter** and enter a **Name** for the filter.



A dialog box titled "Save Filter" with an orange header bar. Inside, there is a label "Name*" followed by a text input field. Below the input field are two buttons: "Cancel" and "Save". The entire dialog content is enclosed in a rounded rectangle with an orange border.

5. Click **Save**.

You can find the saved one under **Saved Filters**.



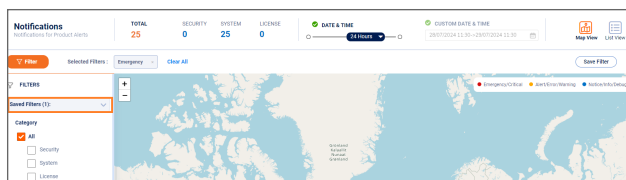
The "Notifications" page for "Product Alerts" features a "FILTERS" section with a funnel icon. Below it, a "Saved Filters (38):" list is shown with an expand/collapse arrow. The list contains three items, each with a radio button and a delete icon (X):

Filter Name	Action
hello	X
RSA-1	X
MSP-Blue Streak C...	X

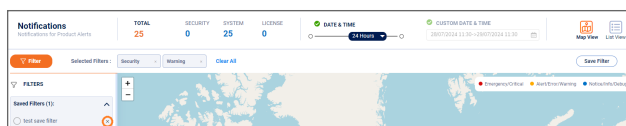
Deleting Saved Filters

To delete the saved filter:

1. Login to **SonicPlatform**.
2. Click the **Dashboard** in the left navigation menu.
3. Click the **Filter** icon under the **Notifications** table.
4. Click the **Saved Filters** to view all the saved filters.



5. Click the **Close** icon of the filter to be deleted.



The saved filter gets deleted from the list.

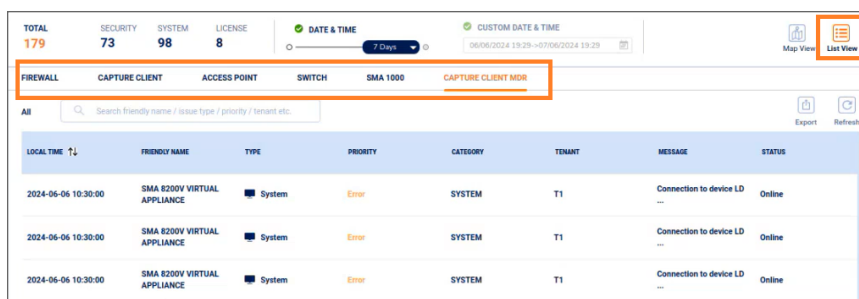
Exporting Alerts

① | **NOTE:** You can export the alerts from the **List View** only.

To export the alerts:

1. Login to **SonicPlatform**.
2. Click the **Dashboard** in the left navigation menu.
3. Click the **List View** in the right corner of the **Notifications** table.

Product-wise alerts are shown with separate tabs.

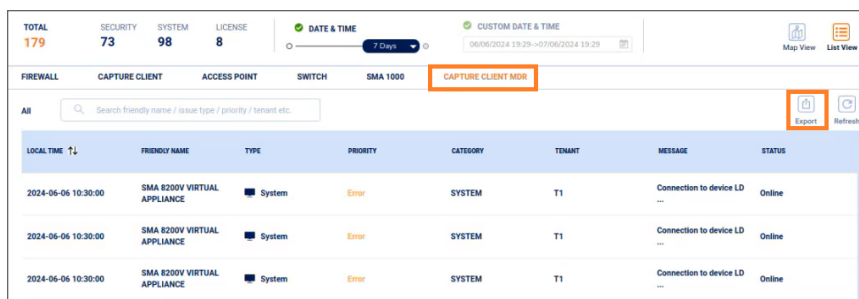


TOTAL 179	SECURITY 73	SYSTEM 98	LICENSE 8	DATE & TIME 7 Days	CUSTOM DATE & TIME 06/06/2024 19:29--07/06/2024 19:29	Map View	List View
FIREWALL CAPTURE CLIENT ACCESS POINT SWITCH SMA 1000 CAPTURE CLIENT MDR							
All Search friendly name / issue type / priority / tenant etc.							
LOCAL TIME	FRIENDLY NAME	TYPE	PRIORITY	CATEGORY	TENANT	MESSAGE	STATUS
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online

4. Select the product tab for which you want to export the alerts.
5. Click the **Export** icon in the right corner of the **Notifications** table.

Alerts of the selected product tab get exported into CSV format.

For the screenshot below, all the alerts available under the **Capture Client MDR** tab will be exported into CSV format.



TOTAL 179	SECURITY 73	SYSTEM 98	LICENSE 8	DATE & TIME 7 Days	CUSTOM DATE & TIME 06/06/2024 19:29--07/06/2024 19:29	Map View	List View
FIREWALL CAPTURE CLIENT ACCESS POINT SWITCH SMA 1000 CAPTURE CLIENT MDR							
All Search friendly name / issue type / priority / tenant etc.							
LOCAL TIME	FRIENDLY NAME	TYPE	PRIORITY	CATEGORY	TENANT	MESSAGE	STATUS
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online
2024-06-06 10:30:00	SMA R200V VIRTUAL APPLIANCE	System	Error	SYSTEM	T1	Connection to device LD	Online

Inventory

The **Inventory** gives a consolidated list of all your products under the organization. The level of visibility and access depends on the user role and access provided by the Super Admin. If you are:

- A Master MSP, you can view all the products under the MSPs and Tenants
- An MSP, you can view all the products of your tenants
- A Tenant, you can view only the products of you

The Inventory information changes with a scope change in **SCOPE SELECTOR**.

The **Inventory** is categorized into:

- **All Products**, shows all your purchased products with expiry and monthly subscribed products. You can see monthly products only if you are a monthly subscribed user. **All Products** option is available to all users.
- **Monthly Subscriptions**, provides all your monthly subscribed products. **Monthly Subscriptions** option is available only to monthly subscribed users.

Topics:

- **All Products**
- **Monthly Subscriptions**

All Products

The **Inventory > Products > All Products** dashboard gives an overview count according to the **SCOPE SELECTOR**:

- Total Products
- Tenants
- License Expiry Alerts
- Updates Available



From the **Inventory > Products > All Products** dashboard, you can perform the below listed operations:

- [Provisioning an MSP](#)
- [Provisioning a Tenant](#)
- [Registering a Product and Multiple Products](#)
- [Provisioning a Product on Monthly Subscription](#)

From the **Inventory > Products > All Products** dashboard, you can perform the below listed operations on the table data:

- Filter the table data with all possible combinations and save the filter preferences for the next time you log in. For more information, refer to [Filtering Products \(All Products\)](#).
- Refresh the table data to get the latest data.
- Customize columns to show or hide the table data. For more information, refer to [Customizing All Products Table](#).
- Export the table data into CSV format. For more information, refer to [Exporting Product Details](#).

Default View:

The **All Products** table summarizes the products on MSP and Tenant-wise. It includes **MSP**, **TENANT**, **FRIENDLY NAME**, **SERIAL#**, **PRODUCT TYPE**, **PRODUCT NAME**, **REGISTERED ON**, Number of **LICENSES**, **SUPPORT** Validity, **FIRMWARE** Version, **Services** and **ACTIONS**.

The screenshot displays the 'All Products' table. The table has columns: TENANT, FRIENDLY NAME, SERIAL #, PRODUCT TYPE, PRODUCT NAME, REGISTERED ON, LICENSES, SUPPORT, FIRMWARE, and ACTIONS. The table contains several rows of product data, including entries for 'MSP-SWGL' and 'MSP-SWGL' with various product names and counts. A 'Filter' button is located above the table, and a 'Save Filter' button is in the top right corner of the table area.

Filtering Products (All Products)

You can filter the products to narrow the list for a specific result by applying a combination of filter attributes, **Product Type**, **Registered On**, **Expiry Date**, **Updates availability**, **Firmware Version**, **Zero Touch** and **MSPs/Tenants**. You can apply these filters individually or in combination. You can also save these combinations of filters for future use.

① **NOTE:** **MSPs/Tenants** attribute is available only for a Master MSP and **Tenants** attribute is available for an MSP.

To filter the alerts:

1. Login to **SonicPlatform**.
2. Click the **Inventory > Products > All Products** in the left navigation menu.
3. Click the **Filter** icon and select the filters that are required.
When you select a filter, the **Save Filter** option is displayed in the right-most corner of the **All Products** table.
4. Enter a **Name** for the filter.
5. Click **Save**.
You can find the saved one under **Saved Filters**.

Customizing All Products Table

You can customize the **All Products** table to show or hide the **PRODUCT TYPE**, **PRODUCT NAME**, **REGISTERED ON**, Number of **LICENSES**, **SUPPORT** Validity, and **FIRMWARE** Version details. By the default, these details are shown in the **All Products** table. Click the **Customize Columns** icon and uncheck the boxes to hide in the table.

Exporting Product Details

NOTE: You may find a discrepancy between the total number shown on the banner or within the table and the total number of entries in the exported table. Table data is exported by expanding all the table data.

Use Case:

In the screenshot below, the **ALL PRODUCTS** table is filtered for **Firewall**. You can see a total of 4 firewalls in this account. But, for the firewalls, 2CB8ED6F4CF0 and 00401005AC68, you can see additional columns for the services activated on the same firewall. When you export the data, expanded data gets added to the table as separate entries. So, the total number of entries in the exported table does not match the number shown on the banner or within the table.

All Products table

Tenant	Friendly Name	Serial #	Product Type	Product Name	Registered On	Licenses	Service	Support	Firmware
Tenant_empt10	Firewall	2CB8ED6F4CF0	FIREWALL	SONICWALL TZ 270W North America	9/12/2024	1	Essential Protection Service Suite	10/2/2024 7.0.1-9134	
Tenant_empt10	Firewall	2CB8ED6F4CF0	FIREWALL	SONICWALL TZ 270W North America	9/12/2024	1	NSM Advanced	10/2/2024 7.0.1-9134	
Tenant_empt10	Firewall	00401005AC68	FIREWALL	SONICWALL NSv 270 Service	10/9/2024	1	Essential Protection Service Suite	11/2/2024 7.0.1	
Tenant_empt10	Firewall	00401005AC68	FIREWALL	SONICWALL NSv 270 Service	10/9/2024	1	NSM Advanced	11/2/2024 7.0.1	

Exported table data

TENANT	FRIENDLY NAME	SERIAL #	PRODUCT TYPE	PRODUCT NAME	REGISTERED ON	LICENSES	Service	SUPPORT	FIRMWARE
Tenant_empt10	Firewall	2CB8ED6F4CF0	FIREWALL	SONICWALL TZ 270W North America	9/12/2024	1	Essential Protection Service Suite	10/2/2024 7.0.1-9134	
Tenant_empt10	Firewall	2CB8ED6F4CF0	FIREWALL	SONICWALL TZ 270W North America	9/12/2024	1	NSM Advanced	10/2/2024 7.0.1-9134	
Tenant_empt10	Firewall	00401005AC68	FIREWALL	SONICWALL NSv 270 Service	10/9/2024	1	Essential Protection Service Suite	11/2/2024 7.0.1	
Tenant_empt10	Firewall	00401005AC68	FIREWALL	SONICWALL NSv 270 Service	10/9/2024	1	NSM Advanced	11/2/2024 7.0.1	
Tenant_empt10	Firewall	004010034969	FIREWALL	SONICWALL NSv 270	10/9/2024	0		10/3/2025 7.0.1	

To export the product details:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Do one of the following:
 - Set the filters according to **Filtering Products (All Products)** to filter the table.
 - Click the hyperlinked number displayed on the **ALL PRODUCTS** banner to filter the table for **LICENSE EXPIRY ALERTS** or **UPDATES AVAILABLE**.
4. Customize the table if needed according to **Customizing All Products Table**.

ALL PRODUCTS		MONTHLY SUBSCRIPTIONS	
TOTAL PRODUCTS	TENANTS	LICENSE EXPIRY ALERTS	UPDATES AVAILABLE
8	9	6	4

- No action is needed to get the complete list of products along with services.

4. Customize the table if needed according to **Customizing All Products Table**.

5. Click the **Export** icon in the right corner of the **ALL PRODUCTS** banner.



The product details are exported into CSV format according to the filter and customization applied in the above steps.

Monthly Subscriptions

① **NOTE:** The Monthly Subscriptions feature is available if you have at least one active product under monthly billing. If you do not have an active monthly subscription, follow [Provisioning a Product on Monthly Subscription](#).

The **Inventory > Products > Monthly Subscriptions** dashboard gives the consolidated list of monthly subscribed users and products:

- Total Tenants
- Total Products
- Number of users per Product type



Product Inventory									
Monthly Subscriptions									
ALL PRODUCTS									
PRODUCTS	TENANTS	UNSUBSCRIBED	PAID	PAID	PAID	PAID	PAID	PAID	PAID
15	5	4	4	4	4	4	4	4	4

From the **Inventory > Products > Monthly Subscriptions** dashboard, you can perform the below listed operations:

- [Provisioning an MSP](#)
- [Provisioning a Tenant](#)
- [Registering a Product and Multiple Products](#)
- [Provisioning a Product on Monthly Subscription](#)
- [Editing Monthly Provisioning](#)

From the **Inventory > Products > Monthly Subscriptions** dashboard, you can perform the below-listed operations on the table data:

- ① **NOTE:** The **SCOPE SELECTOR** controls the display of the data on the **Monthly Subscriptions** table.
- Filter the table data with all possible combinations and save the filter preferences for the next time you log in.
 - Export the table data into CSV format.
 - Customize columns to show or hide the table data.
 - Refresh the table data to get the latest data.

Provisioning an MSP

① **NOTE:** Only a Master MSP can provision an MSP. You can invite a new MSP to your SonicPlatform account or you can add an existing SonicPlatform MSP.

Provisioning an MSP:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
 - ① **NOTE:** If you have an active monthly subscription, you can also provision an MSP on **Inventory > Products > Monthly Subscriptions**.
3. Click **Provision > MSP**.
4. Enter details of a new MSP.
 - ① **NOTE:**
 - Make sure that all the fields marked with (*) are filled.
 - Provisioned MSP will be added to the **Default User Group** on successful completion of the sign up.
 - Enter **MSP ID** and **MSP Contact ID** to invite an existing SonicPlatform MSP.

CREATE A MSP
Enter the MSP information and details

MSP Name*

☐ Default User Group

MSP ID*

MSP Contract ID*

Personal Details

First Name*

Last Name*

Company Name*

Contact & Address Details

Email*

Phone Number*

+1

Address Line 1*

Address Line 2*

Postal Code*

City*

Country*

Select Country

State/Province*

Cancel Create MSP and Exit

5. Do one of the following:
 - Click **Create MSP and Exit** to add the MSP and close the window.
An invitation is sent to the MSP. Once the invited MSP completes the signup, you can see the MSP under your Organization Account.
 - Click **Cancel** if you want to cancel the operation.

On successful saving, you get **SUCCESS** notification:

- If you add a new user who does not have a SonicPlatform account.
 - ① **NOTE:** Now, the new MSP is added to your **All MSP** list, but you cannot add a Tenant until the invited MSP user completes the Sign Up.
- If you add an existing SonicPlatform MSP.
 - ① **NOTE:** Now the new MSP is added to your **All MSP** list and you can add Tenant as needed.

Provisioning a Tenant

① NOTE:

- All users can provision a Tenant.
- If you are a Master MSP, before provisioning a Tenant, make sure that the MSP is provisioned under which you want to provision the Tenant. If the MSP is not provisioned, follow [Provisioning an MSP](#).

Provisioning a Tenant:

1. Login to [SonicPlatform](#).
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
① | **NOTE:** If you have an active monthly subscription, you can provision a tenant on **Inventory > Products > Monthly Subscriptions** also.
3. Click **Provision > Tenant**.
4. Select an MSP Name under which you want to provision a Tenant.
① | **NOTE:**
 - **MSP Name** field is available only if you are a Master MSP.
 - Only the Master MSP has an option to select an MSP under which tenant should be provisioned. For all other users, the tenant will be created under **Global** by the default.
5. Enter details of a new tenant:
 - Tenant Name
 - Personal Details
 - Contact & Address Details
① | **NOTE:** Make sure that all the fields marked with (*) are filled.
6. Select **Make Default Tenant (optional)** box if you want to make this tenant as a default one.
A default tenant holds the products of your organization. If no tenant is selected during the product registration or transfer process, product will be moved under the default tenant.
7. Do one of the following:
 - Click **Cancel** if you want to cancel the operation.
 - Click **Create Tenant and Exit** to add tenant and go back to **Inventory > Products > All Products**.
 - Click **Register Products** to add the tenant and continue to register the products to the newly created tenant.

Create Tenant
Create new tenant with relevant details and register product here.

START — 1 — 2 — 3 — END
Tenant Details Register Products Monthly Subscription

CREATE A TENANT
Enter the Tenant information and details

MSP Name*
Global

Tenant Name*

☐ Make Default Tenant (Optional) ⓘ

^ Custom fields (upto 2):
Please use these fields to add any custom data.

Personal Details

Contact Name* Company Name*

Contact & Address Details

Email*

Phone Number*
+1

Address 1*

Address 2

Postal Code*

City*

Country*
Select Country

State/Province*

Additional Notes

Maximum 200 words

You are prompted for address confirmation if you have not entered the standard address.

 **Address not found**

Please review your billing information and try again.

Standardized addresses helps to ensure the most efficient deliver to your address. A standardized address that matches the one you entered was not found. Please choose from standardized address below.

Address line 1: **Test address**

Address line 2:

City: **Bangalore**

State/Province:

Country: **India**

Postal code: **560049**

☐ Use this address

8. Click **Try Again** to edit the address, else click **Use this address** to continue with the entered address.

Registering a Product and Multiple Products

① | **NOTE:** All the users can register a Product.

Registering a Product:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
① | **NOTE:** If you have an active monthly subscription, you can register a product on **Inventory > Products > Monthly Subscriptions** also.
3. Click **Provision > Product**.
4. Select the Tenant from the **Tenant List** under which you want to register the product.
5. Enter the following details:
 - Any one of the details from the below list:
 - **Serial#**
 - **Activation Key**
 - **Assign Token**
 - **Authentication Code**
 - **Friendly Name** for easy identification after provisioning.

On successful validation of the entered product details, you will get an option to set the management settings.

6. Set the option to manage the product.
You can set to Cloud, On prem, or On box.

The screenshot shows the 'Register Product' form in the SonicPlatform interface. At the top, there is a 'Tenant List' dropdown menu. Below it, there are four input fields: 'Serial # / Activation key / Assign token', 'Authentication Code', 'Friendly Name', and 'Secure Upgrade'. The 'Authentication Code' field is highlighted with an orange border. Below these fields, there is a 'Management Settings' section with a sub-header 'Manage by'. Under 'Manage by', there are three radio button options: 'Cloud', 'On prem', and 'On box'. The 'On box' option is selected. At the bottom of the form, there are four buttons: 'Cancel', 'Register Product & Exit', 'Skip', and 'Register Product & Proceed'.

7. Do one of the following:
 - Click **Register Product & Exit** to register a product and go back to **Product Inventory** page.
 - Click **Register Product & Proceed** to subscribe to Monthly Product.

- You can check the registered product details in the **All Products** table.

Registering multiple Products:

1. Login to [SonicPlatform](#).
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.

①

NOTE: If you have an active monthly subscription, you can register a product on **Inventory > Products > Monthly Subscriptions** also.
3. Click **Provision > Product**.
4. **Download Template** and update the downloaded template with product details.

ADD PRODUCT IS
 Add new product to your shop by completing this form and clicking the "Add Product" button.

Name:

SKU: Inventory: Weight:

Barcode: Price:

Category:

- Click **Upload CSV**, and **Browse** or **drag and drop** the updated template on to the **Upload Your File** window.
- Click **Upload**.
 - On successful validation of the entered product details, only valid products get registered. You can check the registered product details in the **All Products** table.
 - You can also download the list of unregistered serial numbers.

ADD PRODUCTS
Select and activate items to link by downloading CSV or individually filling the details.

[Download Template](#) [Import CSV](#)

Tenant List
Select

#	Serial # / Activation key / Assignment	Authorization Code	Franchise Name
1	"145123456789"	"145678901234"	"TESTING"

[Download CSV \(unassigned\)](#)

Provisioning a Product on Monthly Subscription

Currently SonicPlatform offers the below listed **Products** and **Services** on **Monthly Subscription** program. You can provision any of the **Products** and **Services** listed below.

① **IMPORTANT:** To enable the MDR services, you must first on board with SonicWall MDR team. For more information, contact [SonicWall Sales](#).

Product		Service			
Capture Client	Premier	Advanced			
MDR Services	Capture Client MDR				
Cloud App Security	Basic	Advanced			
Hosted Email Security	Advanced				
NSv Virtual Firewall 270	Essentials Protection Service Suite (EPSS)	Advanced Protection Service Suite (APSS)	High Availability	Network Security Manager Advanced	SSLVPN
NSv Virtual Firewall 470	Essentials Protection Service Suite (EPSS)	Advanced Protection Service Suite (APSS)	High Availability	Network Security Manager Advanced	SSLVPN
NSv Virtual Firewall 50	Basic	Total Secure	Total Secure Advanced		
Secure Mobile Access 8200v	Central User Licenses				
Gen 7 TZ & NSa Services	Threat Protection Service Suite (TPSS)	Essentials Protection Service Suite (EPSS)	Advanced Protection Service Suite (APSS)	SSLVPN	

- ① **NOTE:**
- TPSS service is available only on TZ 270, TZ 370, and TZ 470.
 - TPSS is not available by the default in Monthly Billing. TPSS can be enabled for selected partners in certain countries on-demand through a support case with customer service.

Topics:

- [Provisioning Capture Client, MDR Services, Cloud App Security, HES, NSv 50, and SMA Products](#)
- [Provisioning NSv 270/470 Products](#)
- [Provisioning TZ and NSa Devices](#)

Provisioning Capture Client, MDR Services, Cloud App Security, HES, NSv 50, and SMA Products

This section explains the steps to provision the below listed products on Monthly Billing:

- Capture Client
- MDR Services
- Cloud App Security
- Hosted Email Security
- NSv Virtual Firewall 50
- Secure Mobile Access 8200v

① **NOTE:** You **cannot** provision the below listed products more than once under a tenant. For example, if the Capture Client is already a part of a tenant, you cannot add any more Capture Clients to that particular tenant. But, you can add other products to the same tenant.

- Capture Client
- MDR Services
- Cloud App Security
- Hosted Email Security

To provision a product on monthly billing:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.

① **NOTE:** If you have an active monthly subscription, you can provision a product under monthly billing on **Inventory > Products > Monthly Subscriptions** also.
3. Click **Provision > Monthly Subscription**.

① **IMPORTANT:** **MDR Services** are available only if you have completed on boarding with SonicWall MDR team.

The screenshot shows the 'ADD MONTHLY SUBSCRIPTION' form. At the top, it says 'Please add monthly subscription to products'. Below this, there are several sections: 'MSP Name' with a dropdown menu, 'Tenant List' with a dropdown menu, and 'Choose Product' with a dropdown menu. Below these, there is a section titled 'Active Monthly Subscription' with a subtitle 'Provide a list of monthly subscription and associated workflow'. This section includes 'Service' with a dropdown menu, 'Expiry Date' with radio buttons for 'Never' and 'On', 'Units' with radio buttons for 'Set upper limit' and 'No upper limit', and 'Data Center' with a dropdown menu. There is also a text input field for 'Set here' and a note 'Capture Client - Billing is based on actual usage'. At the bottom, there are 'Cancel' and 'Save and Exit' buttons.

4. Select the **MSP Name** and **Tenant Name** under which you want to add the **Product**.

5. Select the **Product** from the list.
 - a. Select the **Application** for NSv Virtual Firewall 50.

① | **NOTE:** The NSv Virtual Firewall 50 is available for **VMWare**, **Azure**, and **KVM** applications.
6. Select the required **Service** from the list if applicable.
 - a. For the **Basic** Service of the Cloud App Security, select the **Application** from list.

① | **NOTE:** **Basic** Service of Cloud App Security is available for **Office 365** and **Google** applications.
7. Enter the **Friendly Name** of the **Product** if applicable.

① | **NOTE:** For the **Capture Client** and **MDR Services**, the **Friendly Name** gets generated automatically with **Product - Tenant Name** combination.
8. Enter the **Sub domain** name for **Cloud App Security**.
9. Enter the number of licensed **Units** to be provisioned if applicable.
 - a. For the **Capture Client** and **MDR Services**, you can select **Set upper limit** to enter the maximum allowable units or select **No upper limit** to set the maximum allowable units to 99999.
10. Set the **Expiry Date** of the Product.

① | **NOTE:** For **Capture Client** and **MDR Services**, selecting **Never** as the Expiry Date sets the validity for 5 years.
11. Select the applicable **Data Center** if applicable.
12. Click **Save and Exit**.
13. Check **STATUS** of the added Product in the **Monthly Subscriptions** table.

Active	The Product is successfully provisioned, and ready to use.
Provisioning in progress	The Product provisioning is in progress. Wait until the status is changed to Active to use the Product.
Expired	The Product is expired and not available for use.

① | **NOTE:** You can find the **CSC Console** icon for the **Active** Products except for NSv Products.

Provisioning NSv 270/470 Products

This section explains the steps to provision the NSv Virtual Firewall 270/470 on Monthly Billing.

To provision a product:

- 1. Login to **SonicPlatform**.
- 2. Navigate to **Inventory > Products > All Products** in the left navigation menu.

NOTE: If you have an active monthly subscription, you can provision a product under monthly billing on **Inventory > Products > Monthly Subscriptions** also.
- 3. Click **Provision > Monthly Subscription**.

ADD MONTHLY SUBSCRIPTION

Please add monthly subscription to products

MSSP Name *

amazon

Tenant List *

amazon Products

Choose Product *

NSv Virtual Firewall 470

Monthly Subscription (NSv virtual firewall 470)

Provide a gist of monthly subscription and associated workflow.

Enter Friendly Name *

HA Pair

Security Services Bundle *

Essential Protection Service Suite

NSM SaaS (Cloud) *

Network Security Manager Advanced

Cloud Management

SSLVPN Users

10

Expiry Date

Never On

Expiry Date

Never On

Data Center

NSM_DEV_PRE_ALPHA

Manage by

Cloud

Cancel

Save and Exit

- 2. Select the **MSP Name** and **Tenant Name** under which you want to provision the **Product**.
- 3. **Choose Product** from the list.
- 4. Enter the **Friendly Name** of the **Product** if applicable.
- 5. Turn on the **HA Pair** if you want to create High Availability.
- 6. Select the **Security Service Bundle** and the respective **NSM SaaS (Cloud)**.

Security Service Bundle	NSM SaaS (Cloud)	
Essentials Protection Service Suite	No Change	Network Security Manager Advanced

Security Service Bundle	NSM SaaS (Cloud)
Advanced Protection Service Suite	Network Security Manager Essentials <i>i</i> NOTE: Network Security Manager Essentials comes with Advanced Protection Service Suite. No action is required here. By the default, NSM Essentials is selected and you cannot make any changes to it.

7. Set the **Expiry Date** for Security Service Bundle and NSM SaaS (Cloud).
i **NOTE:** If **Advanced Protection Service Suite** is selected as **Security Service Bundle**, you need to set the **Expiry Date** only for **Advanced Protection Service Suite**.
8. Disable the **Cloud Management** if you want to turn off the zero touch for the product. By the default, the **Cloud Management** option is enabled.
 The **Cloud Management** option is available only if **Advanced Protection Service Suite** or **NSM** licensing is selected.
9. Check **I understand that by provisioning monthly licensing, the remaining value of my annual licenses will be lost. Perpetual licensing such as SSL VPN is additive and is not overwritten** box to overwrite an existing license value.
i **NOTE:** The **Security Services Bundle** and/or **NSM SaaS (Cloud)** is overwritten when the service is selected other than **No Change**. This only applies if you are converting an existing term or annual license with future validity. This does not affect perpetual licenses like SSLVPN/GVC or Stateful High Availability.
10. Select the applicable **Data Center**.
11. Enable **SSLVPN Users** to increase SSLVPN Users count under Monthly Billing for NSv Virtual Firewall 270/470.
 Monthly billing is calculated based on licensed units, not on the usage of the licenses.

- a. Enter the number of monthly licenses to be added in **SSLVPN Users** field.

- i* **NOTE:**
- Adding **SSLVPN Users** count on this screen, adds the number to the existing default count. Total count of licenses is equal to total of **default and monthly licenses**. For example, if the unit has 50 default licenses and add 10 monthly licenses, total license count will be 60.
 - Maximum allowed licenses including default and monthly licenses are displayed on the screen.
 - You cannot provision licenses more than the maximum count shown on the screen. The maximum number of licenses allowed differs from each unit.

- b. Set the **Expiry Date** for monthly licenses.

You can set the **Expiry Date** if want to use the monthly licenses for any specific period or else set it to **Never**.

- Click **Save and Exit**.
- Check **STATUS** of the added Product in the **Monthly Products** table.

Active	The Product is successfully provisioned, and ready to use.
Provisioning in progress	The Product provisioning is in progress. Wait until the status is changed to Active to use the Product.
Expired	The Product is expired and not available for use.

❗ | **NOTE:** You can find the **CSC Console** icon for the **Active** Products except for NSv Products.

Provisioning TZ and NSa Devices

This section explains the steps to provision the below listed products under SonicPlatform Monthly services:

- TZ (TZ670, TZ 570, TZ 470, TZ370, TZ270, TZ 570W, TZ 470W, TZ370W, TZ270W, TZ 570P)
- NSa (NSa 6700, NSa 5700, NSa 4700, NSa 3700, NSa 2700)

❗ | **NOTE:** License expiry date for TZ or NSa devices that are licensed through the monthly billing program shows as end of the month but the license gets renewed every month automatically.

To provision a product:

- Login to **SonicPlatform**.
- Navigate to **Inventory > Products > All Products** in the left navigation menu.
❗ | **NOTE:** If you have an active monthly subscription, you can provision a product under monthly billing on **Inventory > Products > Monthly Subscriptions** also.
- Click **Provision > Monthly Subscription**.

ADD MONTHLY SUBSCRIPTION
Please add monthly subscription to products

MSP Name *
amazon

Tenant List *
Test1

Choose Product *
Gen7 TZ & NSa

Monthly Subscription (Gen7 TZ & NSa)
Provide a gen7 monthly subscription and associated workflow

Select Firewall *

Cancel Save and Exit

- Click **Provision > Product**.
- Select the **MSP Name** and **Tenant Name** under which you want to add the **Product** if you are a Master MSP.
- Select **Gen7 TZ & NSa** from **Product** list.

7. **Select Firewall** from the list.

You can either **Register a New Firewall** or select the already registered firewall from the list. When you select:

- **Register a New Firewall**, a new tab opens to register a new firewall.
 - An existing firewall from the list, displays **Active Annual & Perpetual Licensing** statuses, Security Services Bundle and NSM SaaS (Cloud).
- ① | **NOTE:** Provisioning an existing annual license in SonicPlatform Monthly overwrites the remaining value of the license and will be lost.

8. Click the **Refresh** icon next to **Select Firewall** field if you register a new firewall.
9. Select the **Security Service Bundle** and the respective **NSM SaaS (Cloud)**.

Security Service Bundle	NSM SaaS (Cloud)
Essentials Protection Service Suite	Not applicable Network Security Manager Advanced
Advanced Protection Service Suite	Network Security Manager Essentials ① NOTE: Network Security Manager Essentials comes with Advanced Protection Service Suite. No action is required here. By the default, NSM Essentials is selected and you cannot make any changes to it.

10. Set the **Expiry Date** for Security Service Bundle and NSM SaaS (Cloud).
① | **NOTE:** If **Advanced Protection Service Suite** is selected as **Security Service Bundle**, you need to set the **Expiry Date** only for **Security Service Bundle**.
11. Disable the **Cloud Management** if you want to turn off for the product. By the default, the **Cloud Management** option is enabled.
The **Cloud Management** option is available only if **Advanced Protection Service Suite** or **NSM** licensing is selected.
12. Check **I understand that by provisioning monthly licensing, the remaining value of my annual licenses will be lost. Perpetual licensing such as SSL VPN is additive and is not overwritten** box to overwrite an existing license value.
① | **NOTE:** The **Security Services Bundle** and/or **NSM SaaS (Cloud)** is overwritten when the service is selected other than **No Change**. This only applies if you are converting an existing term or annual license with future validity. This does not affect perpetual licenses like SSLVPN/GVC or Stateful High Availability.
13. Enable **SSLVPN Users** to increase SSLVPN Users count under Monthly Billing.

☒ **SSLVPN Users** ①

Expiry Date

☒ **Never** ☐ **On**

10 + 50 = 60 (max:100)

- a. Enter the number of monthly licenses to be added in **SSLVPN Users** field.

① | **NOTE:**

- Adding **SSLVPN Users** count on this screen, adds the number to the existing default count. Total count of licenses is equal to total of **default and monthly licenses**. For example, if the unit has 2 default licenses and add 10 monthly licenses, total license count will be 12.
- Maximum allowed licenses including default and monthly licenses are displayed on the screen.
- You cannot provision licenses more than the maximum count shown on the screen. The maximum number of licenses allowed differs from each unit.

- b. Set the **Expiry Date** for monthly licenses.

You can set the **Expiry Date** if want to use the monthly licenses for any specific period or else set it to **Never**.

14. Click **Provision**.

15. Check **STATUS** of the added Product in the **Monthly Products** table.

Active	The Product is successfully provisioned, and ready to use.
Provisioning in progress	The Product provisioning is in progress. Wait until the status is changed to Active to use the Product.
Expired	The Product is expired and not available for use.

① | **NOTE:** You can find the **CSC Console** icon for the **Active** Products except for NSv Products.

Limitations of Provisioning TZ and NSa Products under Monthly Billing

When you procure Monthly Billing licensing for TZ and NSa products, you **cannot**:

- Transfer the device to a user outside of your organization.
- Use the device as part of a Secure Upgrade.
- Apply an annual license key to it.
- Co-term the SonicPlatform services.
- Use the SonicPlatform Monthly licensed units in closed network scenarios.

① | **NOTE:** Limitations are no longer applicable once the product is removed from Monthly Billing.

Editing Monthly Provisioning

To edit monthly provisioning:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > Monthly Subscriptions** in the left navigation menu.

3. Search with a tenant name to narrow down the table.
4. Click the tenant in the Monthly Subscriptions table.
5. Click more options (three vertical dots) under **ACTIONS** column and click **Edit Product**.

Tenant	Product	Service	License Units	Billable Quantity	Renewing On	Expiry Date	Status	Actions
Tenant: MSP - Amazon	Product: FIREWALL (1)	Advanced Protection Service Suite	1	1	06/01/2024	06/01/2024	ACTIVE	- Edit Product - Open Product Console - Transfer Products - Remove from Monthly Subscription - Delete

6. Make the necessary changes to product provisioning.
7. Click **Provision**.

Transferring Products

You can transfer the products between Tenants and Organization Accounts with a new Organization Account structure.

Topics:

- [Transferring Products between Tenants](#)
- [Transferring Products between Organization Accounts](#)

Transferring Products between Tenants

① | **NOTE:** You can transfer products between tenants of the same MSP only.

To transfer products between tenants:

1. Login to [SonicPlatform](#).
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Search with a tenant name to narrow down the table.
4. Do one of the following:
 - Click the **More Actions** (three vertical dots) under the **Actions** column and select **Transfer Products**.
 - Check the products boxes in the **All Products** table and click **Transfer Products** on top of the

table.

Product Name	Product Type	Product Code	Product Name	Product Code	Location	Status	Action
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product
2CB8ED028E62 (SMA 6210 North America)	...	...	...	...	...	...	Transfer Product

5. Select a tenant from the **Transfer to Tenant** drop-down.
6. Click **Transfer**.

TRANSFER PRODUCTS

Select relevant details and transfer the product

Another Tenant Another Organization

Product(s) Selected: (3)

- ✓ 2CB8ED028E62 (SMA 6210 North America)
- ✓ 2CB8ED028E62 (SONICWALL TZ 470 North America)
- ✓ 18B169024788 (SONICWALL TZ300 North America)

Transfer to Tenant

sonicwall Products

Note: For GSM/NSM On-Prem products, all managed nodes, HA, and agents, will be dissociated.

Cancel Transfer

NOTE:

- There may be chances of losing data when the products are transferred from one tenant to another tenant. Click **Save** to proceed with transfer.

TRANSFER PRODUCTS

Select relevant details and transfer the product

Another Tenant Another Organization

Product(s) Selected: (3)

- ✓ 2CB8ED028E62 (SMA 6210 North America)
- ✓ 2CB8ED028E62 (SONICWALL TZ 470 North America)
- ✓ 18B169024788 (SONICWALL TZ300 North America)

Transfer to Tenant

sonicwall Products

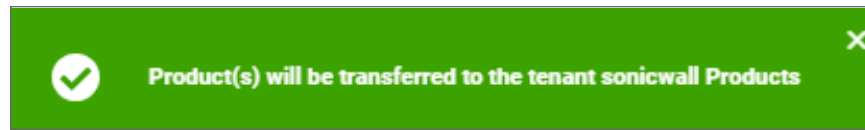
Note: For GSM/NSM On-Prem products, all managed nodes, HA, and agents, will be dissociated.

Cancel Transfer

18B169024788 - Transferring this product to another tenant group will cause data loss and removing from Cloud Security Center, please click on "Save" button again to proceed.

Cancel Save

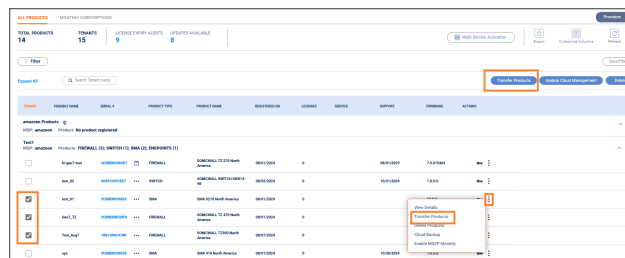
- On a successful transfer, you get a confirmation notification.



Transferring Products between Organization Accounts

To transfer the products between Organization Accounts:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Search with the tenant name to narrow down the table.
4. Do one of the following:
 - Click the **More Actions** (three vertical dots) under the **Actions** column and select **Transfer Products**.
 - Check the product boxes in the **All Products** table and click **Transfer Products** on top of the table.



5. Select **Another Organization** tab in the **Transfer Products** window.
6. Enter the Organization ID of the destination Organization Account.
7. Enter the **Destination Tenant Name** if the details are available.

NOTE:

Products get transferred to the default Tenant of the winning organization if:

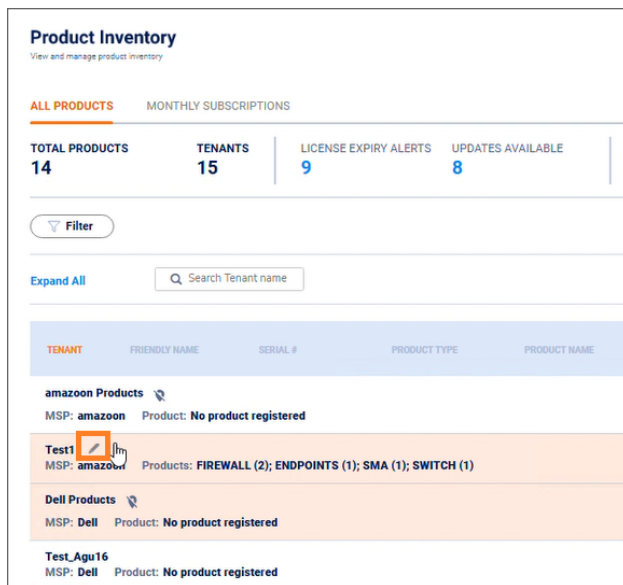
- Provided Destination Tenant Name does not exist in the Winning Organization.
- Destination Tenant Name is not provided.

8. Click **Transfer**.

Editing Tenant Details

To edit Tenant details:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Hover over the Tenant name to be edited in the **All Products** table and click the **Edit** icon.



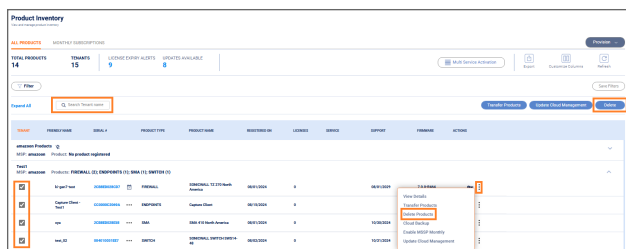
4. Make the necessary changes.
5. Click **Save**.

Deleting a Product

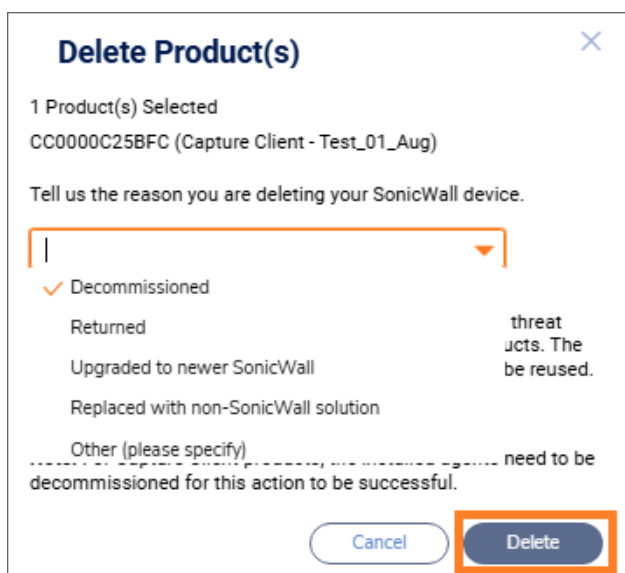
To delete a product:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Search with the tenant name to narrow down the table.
4. Click a tenant row in the **All Products** table from which you want to delete a product.
5. Do one of the following:
 - Click the **More Actions** (three vertical dots) under the **Actions** column and select **Delete Products**.

- Check the products boxes in the **All Products** table and click **Delete** on top of the table. You can select the products under one tenant at a time.



6. Select the reason to delete the product and click **Delete**.



Managing Monthly Subscription

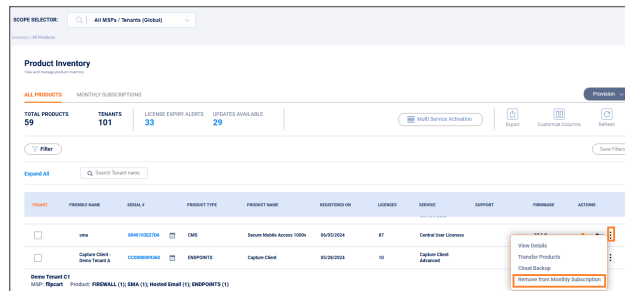
This section gives the information on:

- Converting your annual license into a monthly subscription.
- Removing your product from monthly subscription.

To manage monthly subscription:

1. Login to **SonicPlatform**.
2. Navigate to **Inventory > Products > All Products** in the left navigation menu.
3. Search with the tenant name to narrow down the table.
4. Click the tenant row in the **All Products** table from which you want to manage monthly subscription for the product.

5. Click the **More Actions** (three vertical dots) under the **ACTIONS** column and select **Enable Monthly Subscription / Remove from Monthly Subscription**.
 - **Enable Monthly Subscription** for the product with annual license. Provision the product to convert into monthly billing. For more information about monthly subscription, refer to [Provisioning a Product on Monthly Subscription](#).
 - ① **NOTE:** The remaining value of your annual license will be lost when annual license is converted into monthly billing.
 - **Remove from Monthly Subscription** for the product with license on monthly billing. Product will be removed from monthly billing.



Admin Settings

This section helps in:

- [Users Access Management](#)
- [Getting Additional Help](#)

Users Access Management

The **Users Access Management** helps define and control the role-based access and permissions for the users.

Under the **Users Access Management**, you can find:

- [User Groups](#)
User Groups is available for all users to manage the annual licensed products.
- [Monthly User Groups](#)
① | **NOTE:** Monthly User Groups is available only if you have at least one active product on monthly subscription.

User Groups

The User Group page lists the **Users** added to your account and **User Groups** created. The User Group is defined by these attributes:

- List of **Users**
- **Tenants**
- Role based **Permissions**

From the **User List** tab, you can:

- Filter the user table data
- Invite a new user
- Update Super Admin
- Define or modify the Monthly Billing permissions of the user
- Generate an API key
- Delete an existing user

From the **User Groups** tab, you can:

- Create a new user group
- Add or remove the users from the user group
- Assign tenants to the user groups
- Define or modify the permissions for the user group

Default page:

The **Users Access Management** page shows the **User Groups** tab with list of user groups added under your account in a tabular form.

Topics:

- [Options for the Users Access Management](#)
- [Advanced Filter](#)
- [Modifying the User Management Permissions](#)
- [Interpreting the Users Table](#)
- [Inviting a New User](#)
- [Assigning a Super Admin Role](#)
- [Generating MSW API Key](#)
- [Deleting a User](#)
- [Creating a New User Group](#)
- [Default User Group](#)
- [Assigning Tenants](#)
- [Editing a User Group Name](#)
- [Deleting a User Group](#)
- [Adding Tenants to the User Group](#)
- [Adding Users to the User Group](#)
- [Removing a User from the User Group](#)
- [Setting Role Based Access](#)

Monthly User Groups

① **NOTE:** The Monthly User Groups is available only if you have active billable product under monthly subscription.

The Monthly User Groups page lists the **Users** added to your account and **User Groups** created. The User Group is defined by these attributes:

- List of **Users**
- **Scope** of operation for Tenants
- Role based **Permissions**

From the **Users** tab, you can:

- Filter the user table data
- Invite a new user
- Update Super Admin
- Customize table columns.
- Update MSP permissions
- Generate an API key
- Delete an existing user

From the **User Groups** tab, you can:

- Create a new user group
- Add or remove the users from the user group
- Define or modify the scope to include or exclude the Tenants from the user group
- Define or modify the permissions for the user group

Default page:

The **Users Access Management** page shows the **User Groups** tab with list of user groups added under your account in a tabular form.

Topics:

- [Options for the Users Access Management](#)
- [Advanced Filter](#)
- [Interpreting the Users Table](#)
- [Inviting a New User](#)
- [Assigning a Super Admin Role](#)
- [Generating MSW API Key](#)
- [Customizing Columns](#)
- [Deleting a User](#)
- [Creating a New User Group](#)
- [Default User Group](#)
- [Editing a User Group Name](#)
- [Deleting a User Group](#)
- [Adding Users to the User Group](#)
- [Removing a User from the User Group](#)
- [Defining or Modifying the Scope](#)
- [Modifying the User Group Permissions](#)

Options for the Users Access Management

Icon	Description
	Use the Advanced Filter icon to filter the table data for specific results. You can apply these filter groups either individually or in combination to find the specific notification results.
	Use the Search icon to filter the table data with a specific string.
	Use Generate My API Key icon to generate an API key.
	Use View My API Key icon to view the API key details, but you cannot view the complete API key.
	Use the Customize Columns icon to show or hide ACCESS SCOPE , MSP NAME , MSP PERMISSION , and USER MANAGEMENT PERMISSIONS details.

Advanced Filter

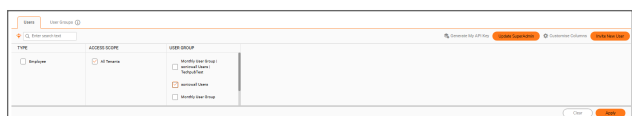
Use the **Advanced Filter** option if you are looking for users of any single filter group or combination of the groups.

To filter data by Advanced Filter:

1. Click the **Advanced Filter** icon and check the required boxes under each filter group.
2. Click **Apply**.
3. Click the **Search** icon and type the specific string to reduce the number of results being displayed.

① | **NOTE:** You can use the **Search** icon either individually or in combination with the **Advanced Filter** groups.

① | **NOTE:** The **Users** table displays the results for all filter groups if none of the filter groups is selected from the **Advanced Filter**.



Modifying the User Management Permissions

This option is available only on **Admin Settings | Users Access Management > User Groups > User List** table.

To modify the management permissions:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User List**.
3. Modify the permission of users as required under **User Management Permission** column.

Permission	
Type	Permissions
ADMIN	This user can view, provision, edit, and delete the products and services.
OPERATOR	This user can only view and edit products and services but cannot provision or delete the products and services.
READ-ONLY	This user can view the products and services but cannot modify.
NO ACCESS	This user cannot view the products and services.

① | **NOTE:** By the default, all Master MSP and MSP users get **ADMIN** permission.

Interpreting the Users Table

On the **Users** tab > **ACTIONS** column, you can perform the below list of operations:

Icon	Description
	Use the Delete icon to delete an existing user from the account
	Use the Lock icon to turn ON or OFF the 2FA mode
	Use the Admin icon to enable or disable Admin role for the user.

Inviting a New User

All Organization Account employees can invite employees of the same domain as the Organization Account domain defined in **My Account** settings. If your company (organization) has been acquired by another or your company domain has changed due to a rebranding, the organization domain can be updated to start adding employees with the new domain. Only the Super Admin of the organization can update the domain.

To invite a new user:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User List**.
If you are a monthly subscription user, you can also invite from **Admin Settings | Users Access Management > Monthly User Groups > Users**.
3. Click **Invite New User**.

Invite User

MSSP*

Global

Select User Group*

Monthly User Group

Contact Type* ⓘ

Employee

It's important that you select the correct contact type

Email Id*

First Name

Last Name

Cancel

Invite

4. Fill in the details.
 - a. Select the **Contact Type** as **Employee**.
Only employees of the same domain as the Organization Account are allowed to add.
 - b. Select the **User Group** to which you want to add the new user if it has already been created else the user will be added to the default group.
 - c. Enter **User Email ID**.
Make sure that the domain of the entered Email ID is the same as the Organization Account domain defined in **My Account** settings.
 - d. Enter **User First Name** and **Last Name**.
5. Click **Invite**.
You can see the invited user in the table along with the status.

ID	EMAIL	TYPE	USER GROUP	LAST INVITED FROM	STATUS	STATUS	STATUS
1	Sonic Platform Admin	Super Admin	Sonic Platform Admin	Invited	Invited	Invited	Invited
2	TestUser@sonicplatform.com	Employee	TestUser	Pending	Pending	Pending	Pending

Assigning a Super Admin Role

NOTE:

- Super Admin role can be assigned only by the signed-up (first) user of a newly signed-up Organization Account.
- Signed-up user should invite a new user to add to the Organization Account.
- On successful signing-up of the invited user, first signed-up user can assign the Super Admin role. The assigned Super Admin can also add or remove other Super Admins.

To assign a Super Admin role:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User List**.
3. Click **Update Super Admin**.

NOTE: For newly signed-up accounts, the signed-up (first) user is added as a Super Admin by the default.
4. Add or update the Super Admins.

NOTE:

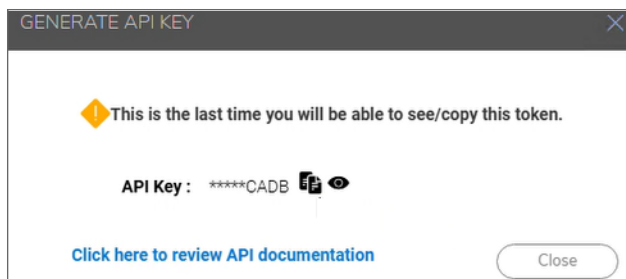
 - One Organization Account can have up to 4 Super Admins.
 - If you want to remove yourself (signed up first user) from the Super Admin role, you can assign the Super Admin role to another user in the Organization Account and remove yourself from the list. At least once Super Admin role should be active for the Organization Account.

- ① **NOTE:** Once the Super Admin role is assigned, the Super Admins have full control over the organization's account resources.

Generating MSW API Key

To generate MSW API key:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User List**.
3. Click **Generate My API Key** on top of the table.
4. Enter **Description**, **Source IP Address (optional)** for the MSW API Key.
By the default, **Validity** of the key is set for 1 year. However, you can set the validity for 1 and 6 months if required.
5. Click **Confirm**.
6. Click the **Copy to clipboard** icon to copy the **API Key**.



⚠ **CAUTION:** You cannot view or copy the API key once you close the **GENERATE API KEY** pop-up window. Make sure that the API key is copied and saved to use in the Swagger or any other API platform.

7. Click **Close**.

- ① **NOTE:**
- Admin of the account can view the API keys generated for the users. If required, admin can revoke the API Key.
 - Your API access is determined based on the access levels defined in SonicPlatform.

Customizing Columns

You can customize the table to show or hide **ACCESS SCOPE**, **MSP NAME**, **MSP PERMISSION**, and **USER MANAGEMENT PERMISSIONS**. By the default, these details are hidden in the **Users** table. To show them in the table, click **Customize Columns** icon on top of the table and check the boxes for the required details.

Deleting a User

① | **NOTE:** Only Super Admin of the account can delete a user.

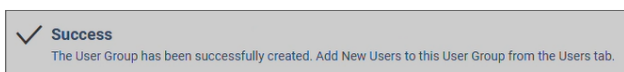
To delete a user:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User List**.
All the invited and joined users are shown in the table.
3. Click the **Delete** icon under the **Action** column.
The user gets deleted from the account.

Creating a New User Group

To create a new user group:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User Groups**.
Monthly User Groups is available only if you an active monthly subscription.
3. Select the **MSP** from the drop-down menu under which you want to create a new user group.
① | **NOTE:** Select **Global** from the drop-down menu if you want to create a User Group for Master MSP organization.
4. Click the **New User Group (+)** icon.
5. Enter a name for the new user group.
6. Click the **Tick** mark next to the **Name** box.
On successful User Group creation, you get **Success** notification.



- ① | **NOTE:**
- Super Admins are added to the newly created user group by the default.
 - Super Admins cannot be removed from the user group.

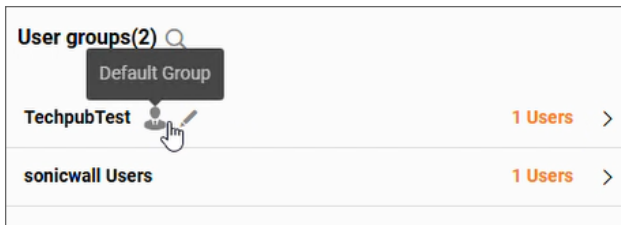
Default User Group

① | **NOTE:**

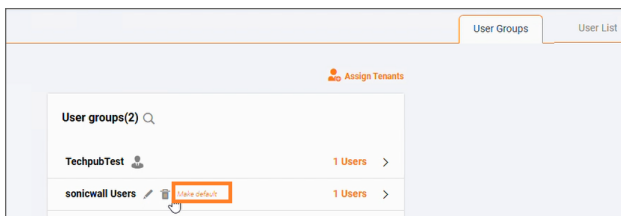
- A default user group comes with the account.
- All Super Admins are added to the default user group.
- You can find the default user group under both User Groups and Monthly User Groups.
- You can assign the Default User Group to another group only under **Admin Settings | Users Access Management > User Groups > User Groups**.
- The default user group cannot be deleted. If you want to delete the default user group, make another user group as default one and delete.

To assign the default user group:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User Groups**.
You can find the default user group along with the created user groups.



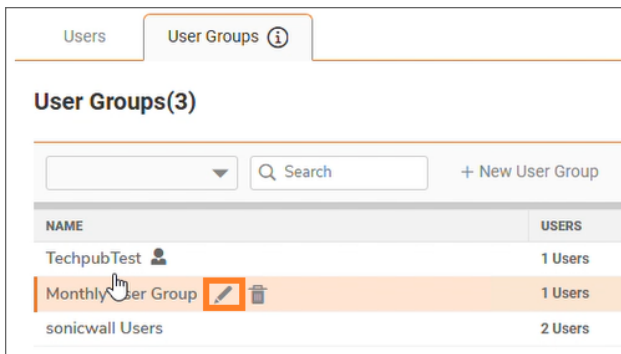
3. Hover over any user group and click **Make Default** to change it to default user group.
- ① **NOTE:** You can change the default user group only from **Admin Settings | Users Access Management > User Groups > User Groups**.



Editing a User Group Name

To edit user group name:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User Groups**.
3. Hover over the user group to be edited and click the **Edit** icon.



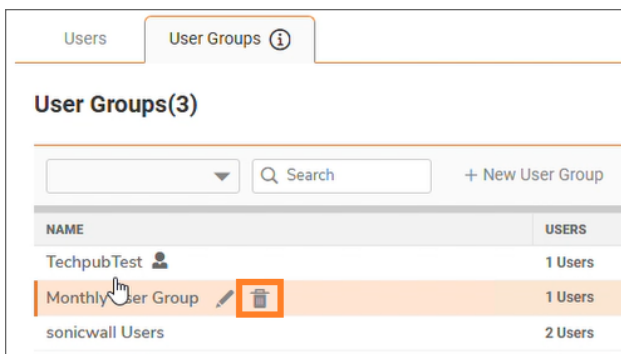
4. Make the necessary changes to the user group name.
5. Click the **Tick** mark next to the **Name** box.

Deleting a User Group

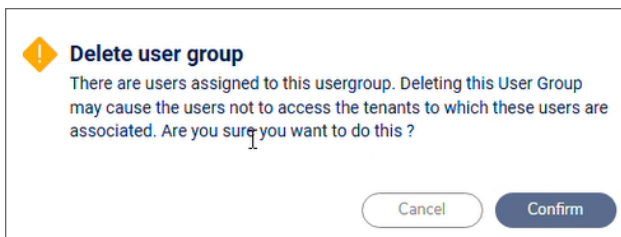
① | **NOTE:** The default User Group cannot be deleted.

To delete user group:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User Groups**.
3. Hover over the user group to be deleted and click the **Delete** icon.

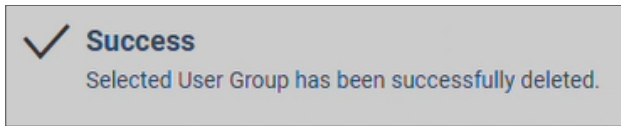


Users of the user group may lose access to the tenants which are part of the deleting User Group.



4. Click **Confirm** in the Delete user group.

On successful User Group delete, you get **Success** notification.



Adding Users to the User Group

To add users to the user group:

1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User Groups**.
3. Select the **MSP** from the drop-down menu.
4. Select the **User Group** from the menu to which user to be added.
① | NOTE: Use **Search** option to filter the required user group from the list if required. If you want to create a new user group, follow [Creating a New User Group](#).
5. In the **Users** section, click **+ Add User**.
6. Check the **Available users** boxes from the list and click **Add** for existing users.
7. Click **Invite New User** and follow [Inviting a New User](#) to invite and add a new user if users are not available in the list.

Removing a User from the User Group

① | NOTE: Super Admins of the account cannot be removed from the user groups.

To remove a user from the user group:

1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Users Access Management > User Groups / Monthly User Groups > User Groups**.
3. Select the **MSP** from the drop-down menu.
Only the Master MSP gets the MSP drop-down menu.
4. Select the **User Group** from the menu to which user to be added.
① | NOTE: Use **Search** option to filter the required user group from the list if required.
5. In the **Users** section, hover over the user to be removed from the user group and click the **Remove** next to the user name.

① | **NOTE:** Remove button is not available for Super Admins.

Tenants	Users	Permissions
Name	Last active	
emp 26.3.0--2 emp26.3.0--2@sonicwall.com	N/A ⚡ N/A	Remove
emp 26.3.0--3 emp26.3.0--3@sonicwall.com	N/A ⚡ N/A	Remove
Test SNWL asdedgert @sonicwall.com	04:58 PM ⚡ Oct 28 2024	

Defining or Modifying the Scope

To define or modify scope:

The **Scope** section allows you to specify the selection of the **Tenants** to the User Group access.

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User Groups**.
3. Select the **MSP** from the drop-down menu.
4. Select the **User Group** from the menu to which user to be added.
① | **NOTE:** Use **Search** option to filter the required user group from the list if required.
2. In the **Scope** section, click **Edit**.
3. Do one of the following to include or exclude in the User Group:
 - Select **All Tenants** to include all Tenants available in your account.
All Tenants option is available only for the User Groups created under the Global MSP.
 - Select **MSP** to include all the Tenants created under the specific MSP.
 - Select **Tenant** and check to include individual Tenants.
① | **NOTE:** Use **Search** option to filter the required Tenants from the list if required.
4. Click **Save**.

Modifying the User Group Permissions

To modify the user group permissions:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User Groups**.

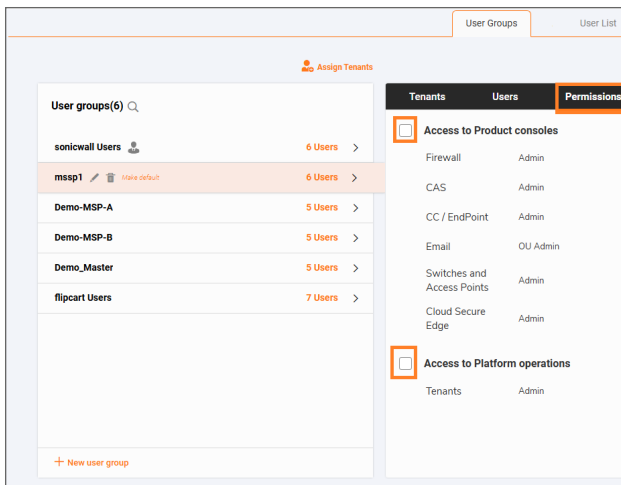
3. Select the **MSP** from the drop-down menu.
4. Select the **User Group** from the menu to which user to be added.
① | **NOTE:** Use **Search** option to filter the required user group from the list if required.
5. In the **Permissions** section, click **Edit**.
6. Set the permissions as required.
By the default, **Admin** access is provided for all User Groups. You can modify the permissions as required.
7. Click **Save**.

Setting Role Based Access

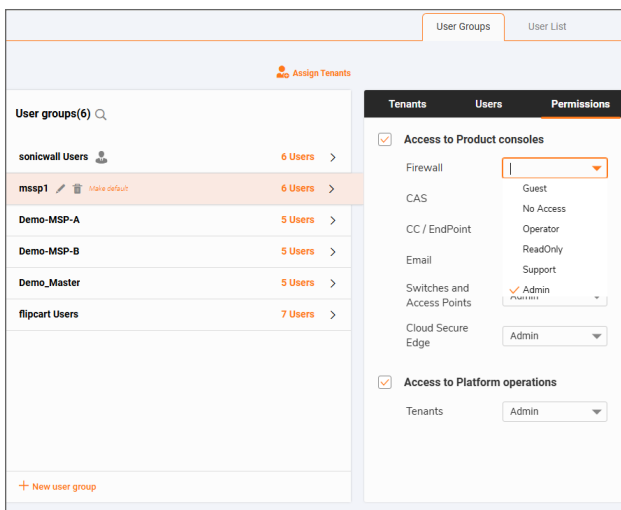
From Permissions, you can set the access level by product-wise and also to the tenants. Based on the permissions set here, Dashboard and Scope Selector get updated.

To set role based access:

1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Users Access Management > User Groups > User Groups**.
3. Select the user group to which role based access to be defined.
4. Click **Permissions** in the header.
① | **NOTE:**
 - Super Admins are part of every user group. If an account has four Super Admins, all four Super Admins will be part of every user group.
 - Super Admins cannot be removed from the user groups.
 - Super Admin will have full access over the organization resources. Permissions applied at user group level are not applied to Super Admins.
 - **Tenants** permission takes the precedence over the **Product Console** permissions. For example, if Tenants permission is given as No Access, users part of that user of the user group cannot see any of the product tiles on the Dashboard even though **Admin** access is given to all Product consoles.
 - If a user is part of multiple user groups with different access levels, least access will be applied to the user account.
For example, a user is part of User Group A and User Group B. User Group A has full **Admin** access to products and tenants. But, User Group B has No Access to all Products and Tenants. The user cannot see any tenants under Scope Selector and product tiles on the Dashboard.



5. Check the **Access to Product Console** to define the access based on the product.
6. Define the access levels by Product and at Tenants level.
By the default, **Admin** access is provided for all Products and Tenants.



Getting Additional Help

The SonicPlatform offers different ways of help to resolve the issues with the SonicWall products and licensing.

If you are facing an issue with an existing SonicWall product, refer to our [Knowledge Base](#) portal, a library of the solutions documented for past issues for a quicker solution.

If the [Knowledge Base](#) portal does not provide a solution for the issue and:

- The issue needs immediate attention or live troubleshooting, contact our dedicated [live support team](#) of your region.
 - The issue does not require immediate attention, log a **Customer Support Case** based on the issue on **Admin Settings | Support & Resources > Customer Support Case** page.
 - **Technical Service Request:** You can log a Technical Service Request for basic troubleshooting or general technical support questions.
 - **Customer Service Request:** You can log a Customer Service Request for assistance with registration or licensing.
- ① **NOTE:** Once you log a support case, our customer support team will contact you via E-mail for further investigation and assistance. The issue will be solved and the solution will be provided in one business day. You can also manage the case from **Admin Settings | Support & Resources > Customer Support Case** page.

SonicWall Support

Technical support is available to customers who have purchased SonicWall products with a valid maintenance contract.

The [Support Portal](#) provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year.

The [Support Portal](#) enables you to:

- View [Knowledge Base articles](#) and [Technical Documentation](#)
- View and participate in the [Community Forum](#) discussions
- View [Video Tutorials](#)
- Access [SonicPlatform](#)
- Learn about [SonicWall Professional Services](#)
- Review [SonicWall Support services and warranty information](#)
- Register at [SonicWall University](#) for training and certification

About This Document

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For more information, visit <https://www.sonicwall.com/legal>.

End User Product Agreement

To view the SonicWall End User Product Agreement, go to: <https://www.sonicwall.com/legal/end-user-product-agreements/>.

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