



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 modify 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 between 15 and 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

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 **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 user 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



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.

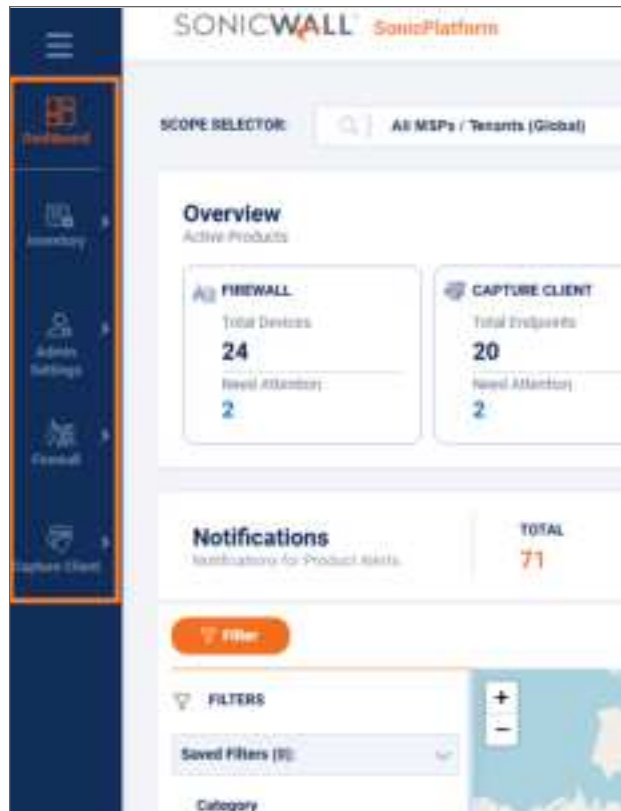
SonicPlatform Tour

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 the product in the left navigation menu to see the available capabilities under each product category.
- Products with sub-menu can be viewed by clicking 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 shows the available features for the selected scope only.



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.






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		<p>The List View gives the complete list of product-wise alerts with separate tabs.</p> <p>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.</p>
Feedback		<p>The Feedback icon helps to provide the feedback about the SonicPlatform from the main page. You can find the Feedback icon in the top right corner of the SonicPlatform.</p>
Notification Center		<p>The Notification Center icon 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.</p>
Support		<p>The Support icon on the SonicPlatform main page navigates to Admin Settings Support & Resources > Customer Support Case page. You can submit service requests and manage the requests. For more information, refer to Getting Additional Help.</p>
Help		<p>The Help navigates to the SonicPlatform documents available on Technical Documentation portal.</p>
My Account		
		<p>The My Account is available at the top right corner of the SonicPlatform. You can customize your organizational and personal account settings here.</p> <p>Only the Super Admin can change the Organizational Settings. For more information, refer to Account Settings.</p>

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 indicate with a color code on the **Map View**.

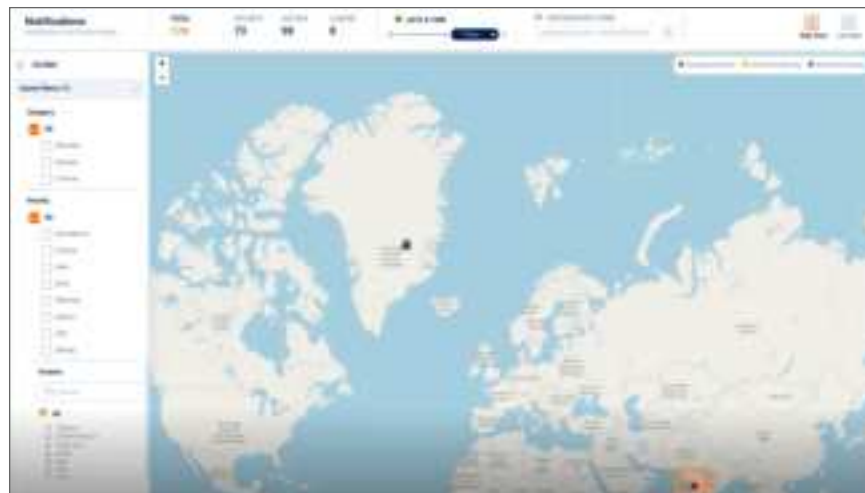
Color of the Alert	Priority Type		
Red	Emergency	Critical	
Orange	Alert	Error	Warning
Blue	Notice	Info	Debug

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 the 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 the default.
3. Click the **List View** on the top-right corner of the **Notifications** table.
Product-wise alerts are shown with separate tabs.



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.

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

Hour

Min

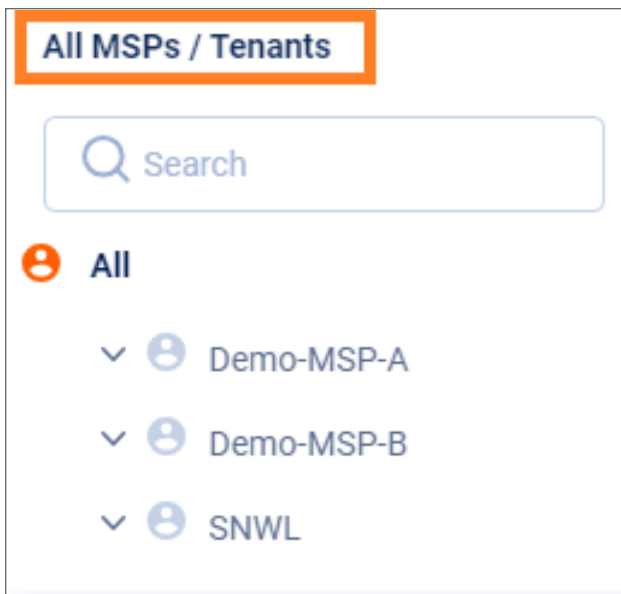
4. Select the filters under each type as required.
By the default, **All** is selected for all filters.



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

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.



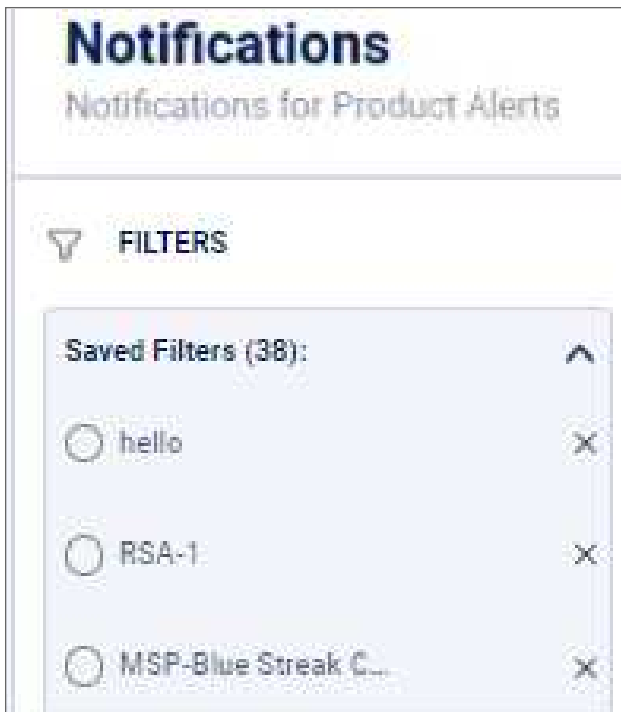
4. Click the **Save Filter** and enter a **Name** for the filter.



A dialog box for saving a filter. It has a light blue header with a red "Save Filter" button. The main area is white with a red border. It contains a "Name*" label, an empty text input field, and two buttons at the bottom: "Cancel" (light blue) and "Save" (dark blue).

5. Click **Save**.

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



The "Notifications" page for "Product Alerts". It features a "FILTERS" section with a funnel icon. Below it, a "Saved Filters (38):" section is expanded, showing a list of filters. Each filter has a radio button, a name, 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

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.



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.



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.
- **Monthly Subscription Report**, page gives you an overview of the monthly usage of the Products in a tabular form.

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**.



MSP	Tenant	Friendly Name	Serial#	Product Type	Product Name	Registered On	Licenses	Support Validity	Firmware Version	Services	Actions
...
...
...
...
...
...
...
...
...
...

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.

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

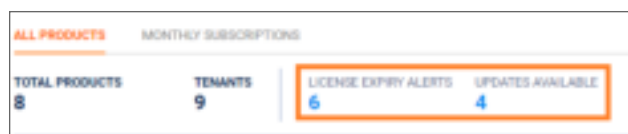


Exported table data

ID	NAME	STATUS	SERVICES	EXPANDED DATA
2CB8ED6F4CF0	Firewall	Active	VPN, IPS, IDS	Expanded data for Firewall 2CB8ED6F4CF0
00401005AC68	Firewall	Active	VPN, IPS, IDS	Expanded data for Firewall 00401005AC68

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**.



- 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

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



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:

- 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.

NOTE: The **SCOPE SELECTOR** controls the display of the data on the **Monthly Subscriptions** table.

Provisioning an MSP

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.
NOTE: If you have an active monthly subscription, you can also provision an MSP on **Inventory > Products > Monthly Subscriptions**.
3. Click **Provision > MSP** also.
4. Enter details of a new MSP.

- 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.



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.
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.
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.



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.

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



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

- Click **Cancel** to cancel the product registration and go back to **Product Inventory** page.
- Click **Skip** to skip the product registration and proceed directly with **Monthly Subscription**.

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.
- 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.



5. Click **Upload CSV**, and **Browse** or **drag and drop** the updated template on to the **Upload Your File** window.
6. 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.



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.

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	

- 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

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.

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**.

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



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

5. **Choose 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**.

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	<p>Network Security Manager Essentials</p> <p>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.</p>

7. Set the **Expiry Date** for Security Service Bundle and NSM SaaS (Cloud).

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.
9. Select the applicable **Data Center** and **Manage By** options.

The **Cloud Management**, **Data Center** and **Manage by** options are available only if **Advanced Protection Service Suite** or **NSM** licensing is selected.
10. 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.

- 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**.

11. Click **Save and Exit**.
12. 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:

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**.

4. Click **Provision > Product**.
5. Select the **MSP Name** and **Tenant Name** under which you want to add the **Product** if you are a Master MSP.
6. 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).

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 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).
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.
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.

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

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.

 **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.

 **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**.



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

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

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.



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

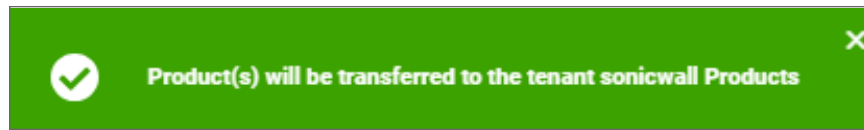


NOTE:

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



- 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:

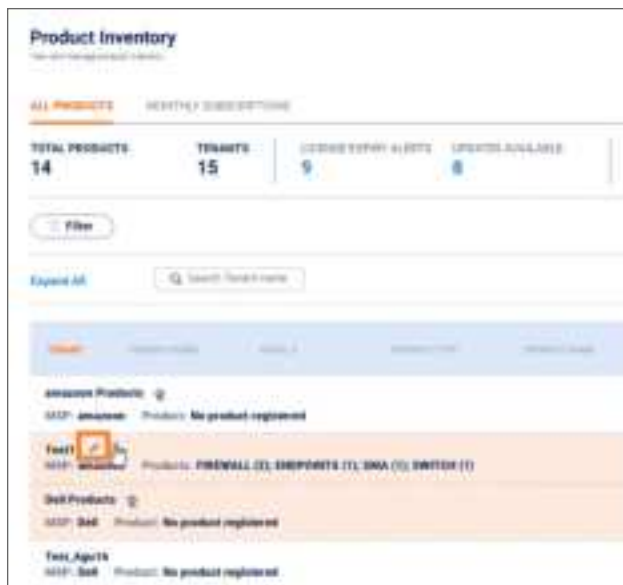
- Provided Destination Tenant Name does not exist in the Winning Organization.
- Destination Tenant Name is not provided.

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**.

Delete Product(s)

1 Product(s) Selected
CC0000C25BFC (Capture Client - Test_D1_Aug)

Tell us the reason you are deleting your SonicWall device.

Decommissioned

Returned threat
Upgraded to newer SonicWall acts. The
Replaced with non-SonicWall solution be reused.

Other (please specify) need to be
decommissioned for this action to be successful.

Cancel 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](#).
 - ❗ **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.



Monthly Subscription Report

The **Monthly Subscription Report** page gives you an overview of the monthly usage of the Products in a tabular form.

The **Monthly Subscription Report** is available on the 1st of every month at 12:00 AM UTC for the previous months billed quantities. The report includes Billing Month, Snapshot Date, MSSP, Tenant, Friendly Name, Serial, Product, Service, SKU#, SKU Description, and Billed Quantity for each procured product. The **Monthly Subscription Report** is **NOT** an invoice. The Monthly Subscription Report can be queried via API, and we also support syncing License Report to agreements with the ConnectWise Manage PSA via our native integration for our partners.

During the last week of each month, SonicWall takes a snapshot of the count of endpoints commissioned or installed for Capture Client as well as the count of provisioned licenses for Firewall Subscription Bundles, Firewall SSL VPN Users, Cloud App Security, Cloud Secure Edge, Hosted Email Security, NSv, and SMA products. SonicWall does not prorate or do partial billing, this means that if a license is removed before the snapshot date, it is not billed but any license that is active during the snapshot is billed for the entire month. MSSPs and MSPs need to know their licensed products so they can bill their customers properly and the Monthly Subscription Report is how they can receive that information on the 1st of every month.

Usage for the complete month is based on the counts taken as per above process. The **Monthly Subscription Report** stores the data for last 24 months.

From the **Monthly Subscription Report** table, you can filter, save the filter preferences, and export the usage of the Products for a month or multiple months in a year. You can also filter the table data for a specific MSP or Tenant.

Default page:






The **Monthly Subscription Report** page gives you an overview on the usage of the Products for previous month of the current year in a tabular form.

You can filter, save the filter preferences, and export the table data with the help of the options available on top of the table.

Topics:

- [Options for Monthly Subscription Report](#)
- [Advanced Filter](#)
- [Generating the Monthly Subscription Report](#)
- [Sorting the Table Data](#)
- [Exporting the Table Data](#)
- [Saving Monthly Subscription Report Filter](#)

Options for Monthly Subscription Report

Icon	Description
	Use the Advanced Filter icon to filter the table data for specific results according to Advanced Filter groups and save the filter preferences for next time log in. You can apply these filter groups either individually or in combination to find the specific notification results.
	Use the Drop-down icon to select a specific MSP, Tenant, Month, and Year from the list.
	Use the Search icon to filter the table data with a specific string.
	Use the Export icon to export the table data into CSV or XLS format.
	Use the Refresh icon to get the most recent data in the table.

Advanced Filter

Use the **Advanced Filter** option if you are looking for details of any single group or combination of the groups listed below.

FILTER GROUPS

Group Name	Description
Products & Services	The Products & Services group displays the complete list of products along with services available for them.
Units	The Units group gives an opportunity to enter the minimum and maximum number of units.
SKU	The SKU group gives an opportunity to filter the product by SKU.

Generating the Monthly Subscription Report

To generate a monthly subscription report:

1. Select the required MSP and Tenant from the respective drop-down lists.
2. Select a month and year from the respective drop-downs.
3. Set the required filters according to **Advanced Filter**.
4. Click the **Search** icon and type a search string if you are looking for any specific details.

Sorting the Table Data

Click the table headings to sort the data in ascending or descending order.

Exporting the Table Data

You can export the filtered table data into CSV format.


To export the table data, click the **Export** icon and select Export CSV.

Saving Monthly Subscription Report Filter

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

To save the alerts filter:

1. Login to **SonicPlatform**.
2. Navigate to the **Inventory > Products > Monthly Subscription Report**.
3. Click the **Advanced Filter** and select the filters as required under each category.
By the default, none of the filters is selected.
When you select a filter, the **Save Filter** option displays in the right-most corner of the table.


 **Filter**

Filters:

[Close](#)

Saved Filters (0):

Products & Services:

 Search

☐ TZ & NSa

☐ Hosted Email Security

☐ Capture Client

☐ Cloud App Security

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

A dialog box titled "Save Filter" with an orange header bar. Inside the dialog, there is a label "Name*" followed by a text input field. Below the input field are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a dark blue background, while the "Cancel" button has a light blue background.

Save Filter

Name*

Cancel Save

5. Click **Save**.
You can find the saved one under **Saved Filters**.

Filter

Filters:Close

Saved Filters (1):

Products & Services:

Search

☐ TZ & NSa

☐ Hosted Email Security

☐ Capture Client

☐ Cloud App Security

Admin Settings

This section helps in:

- [Users Access Management](#)
- [Free Trial](#)
- [Migration Tool](#)
- [Product Management](#)
- [Download Center](#)
- [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](#)

 **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](#)
- [Advanced Filter](#)
- [Modifying the User Management Permissions](#)
- [Interpreting the Users Table](#)
- [Inviting a New User](#)
- [Assigning a Super Admin Role](#)
- [Generating 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

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](#)
- [Advanced Filter](#)
- [Interpreting the Users Table](#)
- [Inviting a New User](#)
- [Assigning a Super Admin Role](#)
- [Generating 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

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. This icon is available only in Monthly User Groups .
	Use the Add User icon to invite a new employee belongs to the same domain as the Organization Account.

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.

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

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.

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:

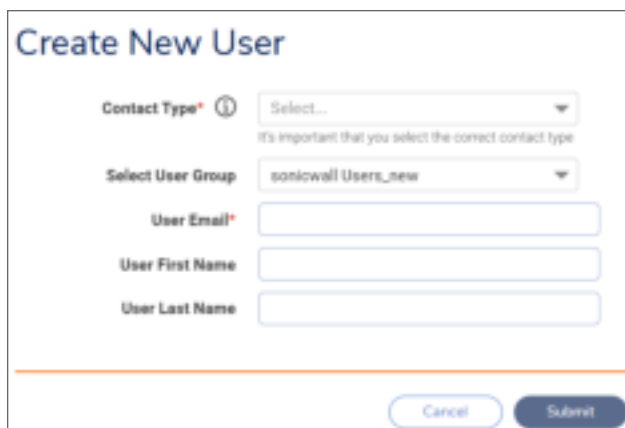
Icon	Description
	Use the Delete icon to delete an existing user from the account
	Use the Lock icon to turn ON or OFF the 2FA mode
	Use the Admin icon to enable or disable Admin role for the user.
	User the Key icon to view or manage the API key generated for the user.

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 the **Add User** icon.



The image shows a 'Create New User' form. It has a title 'Create New User' at the top. Below the title, there are four fields: 'Contact Type*' with a dropdown menu showing 'Select...', 'Select User Group' with a dropdown menu showing 'sonicwall Users_new', 'User Email*', 'User First Name', and 'User Last Name'. There are also 'Cancel' and 'Submit' buttons at the bottom right.

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**.
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 **Submit**.
You can see the invited user in the table along with the status.



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.

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

Generating API Key

To generate 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 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**.

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

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.
4. Click **Yes** in the **Confirmation** window.
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 have an active monthly subscription.
3. Select the **MSP** from the drop-down menu under which you want to create a new user group.
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.



NOTE:

- Super Admins are added to the newly created user group by the default.
- Super Admins cannot be removed from the user group.

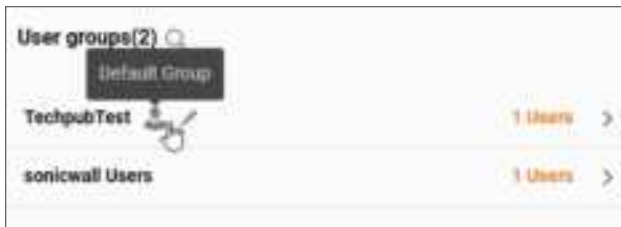
Default User Group

NOTE:

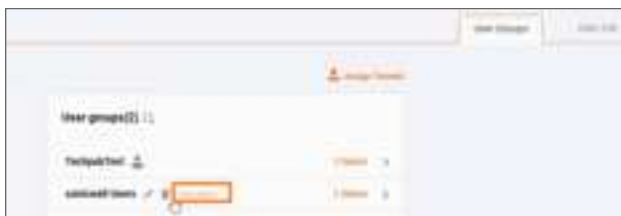
- A default user group comes with the account.
- All Super Admins are added to the default user group.
- You can find the default user group under both User Groups and Monthly User Groups.
- You can assign the Default User Group to another group only under **Admin Settings | Users Access Management > 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.



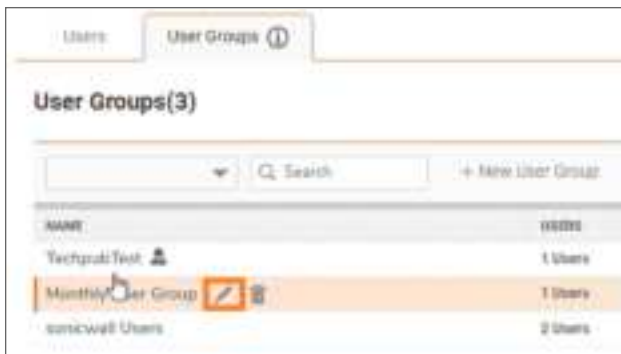
3. Hover over any user group and click **Make Default** to change it to default user group.
- ① **NOTE:** You can change the default user group only from **Admin Settings | Users Access Management > User Groups > User Groups**.



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

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 loose 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.
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

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.
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.

❗ | **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 asdehgw1@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.
❗ | **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.
❗ | **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**.

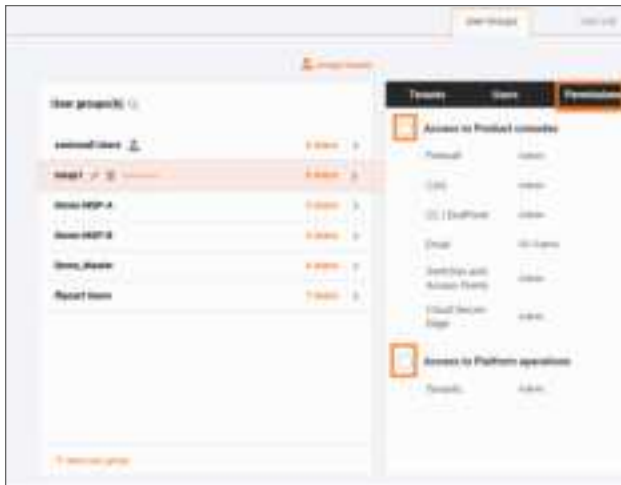
3. Select the **MSP** from the drop-down menu.
4. Select the **User Group** from the menu to which user to be added.
📌 | NOTE: Use **Search** option to filter the required user group from the list if required.
5. In the **Permissions** section, click **Edit**.
6. Set the permissions as required.
By the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

Setting Role Based Access

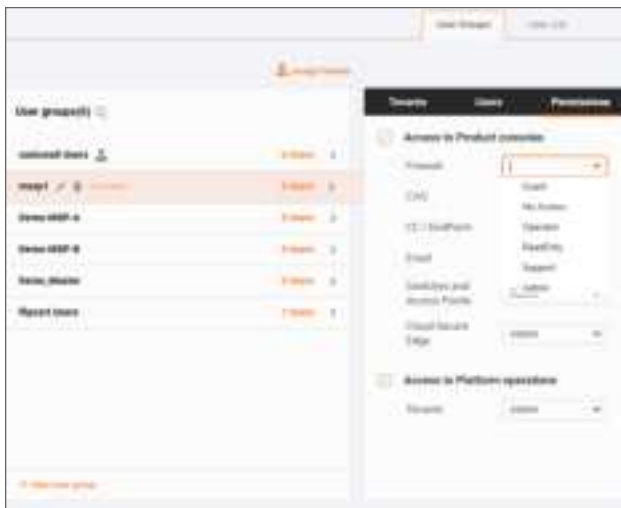
From Permissions, you can set the access level by product-wise and also to the tenants. Based on the permissions set here, Dashboard and Scope Selector get updated.

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.
📌 | 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.



Free Trial

The SonicPlatform gives you an opportunity to learn about other SonicWall offerings and install the trial version.

A trial can be activated from:

- The Dashboard overview. For more information, refer to [Dashboard](#).
- The **Admin Settings > Free Trial** page.



Migration Tool

From the SonicPlatform, you can migrate settings from an existing configuration of your SonicWall Product Series systems. This tool enables the creation of a new settings file that can be imported into the target SonicWall Product Series systems.

Navigate to **Admin Settings > Tools > Migration Tool**.

Clicking on the **Migration Tool** redirects to the migration tool page. For more information, refer to [Migration Tool User Guide](#).

Product Management

From the Product Management, you can

- View the SonicWall promotions under [My Promotions](#)
- Set the [Service Co-termination](#) dates for your services.

My Promotions

From the **My Promotions** page gives:

- The active SonicWall promotions
- Promotions that you are eligible for under Applicable Promotions
- History of the SonicWall promotions that you have previously applied for

From the **My Promotions** page, you can:

- Upgrade to eligible SonicWall product
- Get a Competitive Replacement

Manage Trade-In Promotions
2020-01-01 to 2020-01-01

#	Promotion	Start Date	Description
1	Sonic Upgrade	01 Jan 2020	Upgrade any older generation appliances that you currently own for a compatible Sonic generation product.
2	Sonic Replacement Program	01 Jan 2020	Trade in your old generation SonicWALL appliance for a new generation SonicWALL or SonicWALL Threat Management (TMG) device.
3	Sonic Cloud Threat Protection	01 Jan 2020	Sonic Cloud Threat Protection
4	Sonic Cloud Protection	01 Jan 2020	Sonic Cloud Protection
5	Sonic Cloud Protection	01 Jan 2020	Sonic Cloud Protection
6	Sonic Cloud Protection Edge	01 Jan 2020	Sonic Cloud Protection Edge

Applicable Promotions
SonicWALL Promotions that are currently active and available. Some promotions may require you to purchase and register new hardware.

[View Details](#)

Promotion History
The history of completed promotions that you have previously applied to.

[View Details](#)

To upgrade to SonicWall product:

1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Product Management > My Promotions**.
3. Click the promotion you want to opt under Applicable Promotions.
4. Click the **Edit** icon to the Trade-In Unit in the table.



5. Select the SonicWall Replacement.



6. Click **Confirm**.
7. Select a Trade-In Unit from the list to qualify the Upgrade Unit.
NOTE: Services from the Trade-In Unit will be transferred to the Upgrade Unit.
8. Click **Confirm**.

To get a competitive replacement:

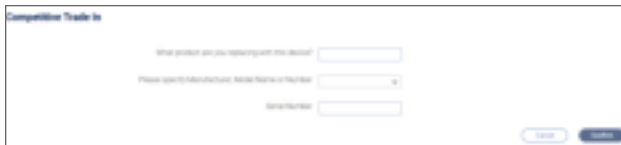
1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Product Management > My Promotions**.
3. Click the promotion you want to opt under Applicable Promotions.
4. Click the **Edit** icon to the Trade-In Unit in the table.



5. Select the Competitive Replacement.



6. Click **Confirm**.
7. Enter the replacement device you are looking for and the competitor device details.



8. Click **Confirm**.
After validating the entered competitor details, device will be assigned.

Service Co-termination

The **Service Co-termination** page gives you the power to adjust the expiration dates of services to a common date.

To adjust the expiration dates:

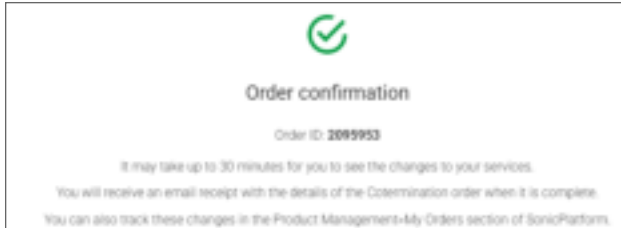
1. Login to **SonicPlatform**.
2. Navigate to **Admin Settings | Product Management > Service Co-termination**.
3. Do one of the following:
 - Check the services box for which you want to adjust the expiration date.
 - Check the box in the table header to select all services
4. Click **Get Co-term Date**.



5. If you are satisfied with the new co-term Date, check **I agree to the terms and conditions** box and click **Complete**.



Service expiration dates will be updated from the Current Expiration to the co-term Date for the selected items. You will receive an email confirmation of the co-term order.



Download Center

The **Download Center** is a common repository to:

- View or download the set-up files for the eligible products registered with SonicWall. You can download the eligible software on regular basis or on an as needed basis.
- View the set-up files for all other products that SonicWall has released.
- View or download the Release notes for all the products that SonicWall has released.

Topics:

- [Eligibility Criteria](#)
- [Downloading Set-up Files for Eligible Active Products](#)
- [Download Signatures](#)

Eligibility Criteria

Eligibility criteria to download the software for a product is that user should have registered at least one product with SonicWall and have active support.

Example:

If the product is registered in the year 2015 and the support is expired in the year 2020, you are allowed to download the software versions released from year 2015 to 2020 only. You can view all other releases of the product till date, but the download is allowed till the active support date only.

Downloading Set-up Files for Eligible Active Products

You can download the set-up files for the eligible products registered with SonicWall in the following ways:

- [Downloading Set-up Files for Eligible Active Products by Product Line](#)
- [Downloading Set-up Files for Eligible Active Products by Version](#)

Downloading Set-up Files for Eligible Active Products by Product Line

You can download the set-up files for the eligible products registered with SonicWall by Product Line or by Version.

To download the set-up files by Product Line:

1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Download Center > by Product Line**.
3. Set the filters from **Version, Products, Language, and Release Type** down-down menu to narrow the table data.
4. Click the **Advance Filter** icon set the filters as required.
5. Click the **Search** icon and type a search string if you are looking for any specific product release.
6. Click the **Arrow** icon of the release in the table to show the details.
7. Click the **Information** icon at end of the expanded table know the type of release and definition of releases.
8. Click the **Download** icon to download the required set-up files or release notes from the **ACTIONS** column. If the download is restricted for any of the set-up files, check the [Eligibility Criteria](#).
9. Click the **Release Notes** icon to view the Release notes in the browser.
10. Click the **Arrow** icon of the release in the table to show or hide the details.



Downloading Set-up Files for Eligible Active Products by Version

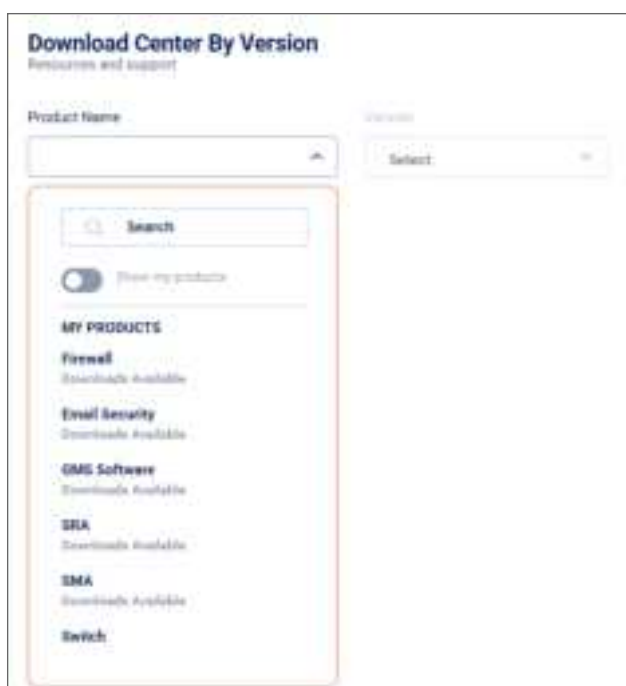
To download the set-up files by Version:

1. Login to [SonicPlatform](#).
2. Navigate to **Admin Settings | Download Center > by Version**.
3. Click **Product Name** drop-down menu and perform in one of the following ways:
 - Enter name of the product in **Search** field.
 - Enable the **Show my products** option to list only your active products and select the required product from the **MY PRODUCTS** list.



NOTE:

- You can identify the active products with **Downloads Available** text below the product name.
- When the product is selected, the **Advance Filter** and **Search** fields are enabled at top corners of the table.



4. Click the **Advance Filter** icon.
5. Select the required filters for **LANGUAGE**, **RELEASE TYPE**, and **RELEASE DATE**, which displays the selected active filters on top of the table.
6. Click **Close** (x) to remove the filter.
7. Click the **Search** icon and type a search string if you are looking for any specific product release.

8. Enable the **Show latest available downloads** option on top of the table to list the latest available software to download.
9. Click the major release number and navigate to the required software release in the Version drop-down menu, which displays a table with **NAME** of the product, **RELEASE DATE**, **EOS DATE**, **LANGUAGE** of the files, **TYPE** of release, and **FILE**.



10. Point to the **Information** icon in the **NAME** column to view statistics of the particular release set-up files.
11. Click **Close** (x) to close the statistics information.
12. Click the **Information** icon next to the **TYPE** heading to know the different types of releases and their definitions.
13. Click the **Download** icon to download the required set-up files or release notes from the **Files** column. If the download is restricted for any of the set-up files, check the [Eligibility Criteria](#).
14. Click the **View** icon to view the Release notes in the browser.
15. Click the **Arrow** icon of the release in the table to show or hide the details.

Download Signatures

The **Download Signatures** page is a common place to download the signature file for the registered and shared products under your MySonicWall account which are running SonicOS enhanced version 3.2 or newer .

Default page:

The **Download Signatures** page displays the lowest **Signature ID** of your products, signature update applicability, the list of **Applicable Products** grouped under the ID and the link to download the signature file.

All SonicWall products are grouped under particular Signature IDs. The **Signature ID** displays in the list only if you have registered or shared at least one product with your SonicPlatform account.



To download the Signature file:

1. Select the **Signature ID** from the list.

NOTE: The **Signature ID** list may vary for you per the products registered and shared with your MySonicWall account.



2. Check the product for which the signature file is required falls under the **Applicable Products**. If yes, go to next step, otherwise, repeat step 1 with remaining **Signature IDs**.

NOTE: The **Applicable Products** list may vary for you per the products registered and shared with your MySonicWall account.

3. Check the version of your product is eligible for update with Signature file. If yes, go to next step, otherwise, update the Signatures manually.
4. Click **Download** to download the signature file.

Download Signature

Enter signature ID and download

Download Signature File based on the Signature File ID for your Product. This feature is available only when running SonicWALL Enhanced version 3.2 or newer.

Signature ID

Enter Signature ID manually for version 3.2.0

Applicable Products

WiFi 1040, 404, 4750, WiFi 270, WiFi 400, WiFi 570, WiFi Service 270, WiFi Service 400/475, WiFi Service 400, 500/500, 77 570, 77 470, 77 400, 77 500/500

Available Download

Download

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.

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

SonicPlatform Administration Guide
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232-006133-00 Rev B

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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/>.

Open Source Code

SonicWall Inc. is able to provide a machine-readable copy of open source code with restrictive licenses such as GPL, LGPL, AGPL when applicable per license requirements. To obtain a complete machine-readable copy, send your written requests, along with certified check or money order in the amount of USD 25.00 payable to "SonicWall Inc.", to:

General Public License Source Code Request
Attn: Jennifer Anderson
1033 McCarthy Blvd
Milpitas, CA 95035