

# MySonicWall MSSP Monthly Billing

## Feature Guide



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# Overview

Welcome to the MySonicWall MSSP Monthly Billing Feature Guide. This guide is applicable for MySonicWall users who have MSSP permissions.

This guide helps you provision, manage Tenant, and Product. It also helps you generate the monthly license reports by Tenant.

With help of this guide, you can perform the below listed operations:

- [Provisioning Tenant and Product](#)
- [Editing Tenant or Product Details](#)
- [Access Management](#)
- [Deleting Product](#)
- [Generating the Monthly License Report](#)
- [Exporting the Table Data](#)

## Topics:

- [Monthly Products](#)
- [Access Management](#)
- [License Report](#)

# Monthly Products

Navigation: **Monthly Billing** > **Monthly Products**

The **Monthly Products** page gives you a quick overview of Tenants, and Products registered under Tenant.

 TENANTS 12	 NSv FIREWALLS 2	 CMS POOLED USERS 4	 CLOUD EDGE USERS 1	 HOSTED EMAIL SECURITY USERS 1
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The **Monthly Products** page summarizes the list of Products added under each Tenant group in a tabular form.

From the **Monthly Products** table, you can perform the below operations on the table data:

- Filter the table data with all possible combinations and save the filter preferences for next time log in
- Refresh and sort the table data to identify the specific results
- Customize columns to show or hide the table data
- Export the table data into CSV or XLS format

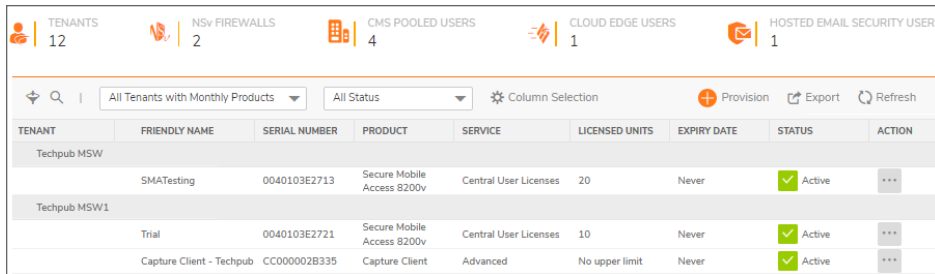
From the **Monthly Products** page, you can perform the below operations:

- Provision Tenant and Product
- Edit details of the Tenant
- Launch CSC Product console
- Modify the allocation of licensed units, expiry date, and service type (if applicable) of the Product
- Download the Product details of the Tenant into CSV or XLS format
- Transfer the Product to another Tenant
- Delete the Product
- Remove the Product from Monthly Billing

## Default page:

The **Monthly Products** page summarizes the list of Products added under each Tenant.

- The **Monthly Products** table includes **TENANT**, **FRIENDLY NAME**, **SERIAL NUMBER**, **PRODUCT**, **SERVICE**, **LICENSED UNITS**, **EXPIRY DATE**, and **ACTION**.
- **BILLABLE QUANTITY**, **FIRMWARE**, **REGISTRATION DATE**, and **STATUS** are not shown in the default view. To show them in the table, click the **Column Selection** icon and check the boxes.









TENANT	FRIENDLY NAME	SERIAL NUMBER	PRODUCT	SERVICE	LICENSED UNITS	EXPIRY DATE	STATUS	ACTION
Techpub MSW	SMATesting	0040103E2713	Secure Mobile Access 8200v	Central User Licenses	20	Never	Active	...
Techpub MSW1	Trial	0040103E2721	Secure Mobile Access 8200v	Central User Licenses	10	Never	Active	...
Capture Client - Techpub	CC000002B335	Capture Client	Advanced	No upper limit	Never	Active	...	

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

## Topics:

- [Options for Monthly Products](#)
- [Quick Filter](#)
- [Customizing the Table Data](#)
- [Interpreting the Monthly Products Table](#)
- [Provisioning Tenant and Product](#)
- [Editing Tenant or Product Details](#)
- [Deleting Product](#)
- [Sorting the Table Data](#)
- [Exporting the Table Data](#)

# Options for Monthly Products

Icon	Description
	Use the <b>Quick Filter</b> icon to filter the table data for specific results according to <b>Quick Filter</b> 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 results.
	Use the <b>Drop-down</b> icon to select a specific Tenant from the list.
	Use the <b>Search</b> icon to filter the table data with a specific string.
	Use the <b>Refresh</b> icon to get the most recent data in the table.
	Use the <b>Export</b> icon to export the table data into CSV or XLS format.
	Use the <b>Column Selection</b> icon to view additional fields available to show or hide the details in the table data, <b>BILLABLE QUANTITY</b> , <b>FIRMWARE</b> , <b>REGISTRATION DATE</b> , and <b>STATUS</b> .

# Quick Filter

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

The screenshot shows a software interface with a search bar at the top left containing 'All Tenants with Monthly Products'. To the right are dropdown menus for 'All Status' and 'Column Selection', and buttons for 'Provision', 'Export', and 'Refresh'. Below this is a table with five filter groups: PRODUCTS, SERVICES, LICENSED UNITS, START DATE, and EXPIRY DATE. Each group has a list of items with checkboxes. The LICENSED UNITS group has input fields for a range (0 to 99999). The START DATE and EXPIRY DATE groups have date range selectors.

## FILTER GROUPS

Group Name	Description
<b>PRODUCTS</b>	The <b>PRODUCTS</b> group displays the list of products available under Monthly Billing.
<b>SERVICES</b>	The <b>SERVICES</b> group displays the complete list of services available for the products listed under <b>PRODUCTS</b> group.
<b>LICENSED UNITS</b>	The <b>LICENSED UNITS</b> group allows to enter the minimum and maximum number of licensed units.
<b>START DATE</b>	The <b>START DATE</b> group allows to select the start date of the service.
<b>EXPIRY DATE</b>	The <b>EXPIRY DATE</b> group allows to select the expiry date of the service.

### To Filter Data by Quick Filter:

1. Click the **Quick Filter** icon available at top left corner of the table.
2. Select the required filter options.
3. Click **Apply** to set the filter preferences only for this time, otherwise, click **Save & Apply** to set and save the filter preferences for next time log in.  
**📘 | NOTE:** Saved filter preferences are applied until you choose to **Clear** and **Save & Apply**.
4. Click **Clear** to reset the filters.

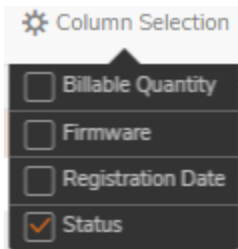
### 📘 | NOTE:

- To show or hide the filter groups at any point, click the **Quick Filter** icon available at top-left corner of the table.
- If none of the filter group is selected from the **Quick Filter**, the table displays the details for all filter groups.



# Customizing the Table Data

You can customize the **Monthly Products** table to show or hide the **BILLABLE QUANTITY**, **FIRMWARE**, **REGISTRATION DATE**, and **STATUS** details. By the default, these details are not shown in the **Monthly Products** table. Click the **Column Selection** icon and check the required boxes to include in the table.



① **NOTE:** Once you check the boxes, the selected details remain checked and shown in the table data for next time log in until you change the preferences.

## Provisioning Tenant and Product

Navigation: **Monthly Billing | Monthly Products**

### Topics:

- [Provisioning Tenant](#)
- [Provisioning Product](#)

## Provisioning Tenant

### *To add a Tenant:*

1. Navigate to **Monthly Billing | Monthly Products**.
2. Click **Provision > Tenant**.
3. Enter details of a new Tenant.
4. Do one of the following:
  - Click **Save & Close** to add the **Tenant**.
  - Click **Next: Add Product** to add the **Tenant** and proceed with addition of **Product**.  
You are prompted for **Address Confirmation** if you have not entered the standard address.
5. Click **Return to previous page to try again** to edit the address, else click **USE THIS ADDRESS** to add Tenant.

# Provisioning Product

Currently SonicWall offers the below listed **Products** and **Services** on **Monthly Billing** 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](#)
- [Limitations of Provisioning TZ and NSa Products under Monthly Billing](#)

# 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:*

1. Navigate to **Monthly Billing | Monthly Products**.
2. Click **Provision > Product**.
  - ① **IMPORTANT:** **MDR Services** are available only if you have completed on boarding with SonicWall MDR team.
3. Select the **Tenant Name** under which you want to add the **Product**.
4. Select the required **Product** from the list if applicable.
  - a. Select the **Platform** for NSv Virtual Firewall 50.
    - ① **NOTE:** The NSv Virtual Firewall 50 is available for **VMWare, Azure, and KVM** platforms.
5. 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.
6. 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.

7. Enter the **Sub domain** name for **Cloud App Security**.
8. 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.
9. 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.
10. Select the applicable **Data Center**.  
For **MDR Services**, Data Center gets selected by the default.
11. Click **Provision**.
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 <b>Active</b> 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. Navigate to **Monthly Billing | Monthly Products**.
2. Click **Provision > Product**.
3. Select the **Tenant Name** under which you want to add the **Product**.
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)**.

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

Security Service Bundle	NSM SaaS (Cloud)
Advanced Protection Service Suite	Network Security Manager Essentials
	<p><b>NOTE:</b> 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 **Zero Touch** if you want to turn off for the product. By the default, the **Zero Touch** option is enabled.  
The **Zero Touch** 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.
 

**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.

SSLVPN Users   ⓘ 10+50 = 60 (max:100)    Expiry Date  Never  On  📅

- 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**.

12. Click **Provision**.
13. 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 <b>Active</b> 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 TZ and NSa Devices

This section explains the steps to provision the below listed products under MSSP 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)

① | **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. Navigate to **Monthly Billing | Monthly Products**.
2. Click **Provision > Product**.
3. Select the **Tenant Name** under which you want to add the **Product**.
4. Select **Gen7 TZ & NSa** from **Product** list.
5. **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 MSSP Monthly overwrites the remaining value of the license and will be lost.

6. Click the **Refresh** icon next to **Select Firewall** field if you register a new firewall.

7. Select the **Security Service Bundle** and the respective **NSM SaaS (Cloud)**.

Security Service Bundle	NSM SaaS (Cloud)	
Threat Protection Service Suite	Network Security Manager Essentials	Network Security Manager Advanced
Essentials Protection Service Suite	Not applicable	Network Security Manager Advanced
Advanced Protection Service Suite	Network Security Manager Essentials	
	ⓘ <b>NOTE:</b> 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.	

8. 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**.
9. Disable the **Zero Touch** if you want to turn off for the product. By the default, the **Zero Touch** option is enabled.
- The **Zero Touch** option is available only if **Advanced Protection Service Suite** or **NSM** licensing is selected.
10. 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.
11. Enable **SSLVPN Users** to increase SSLVPN Users count under Monthly Billing.

SSLVPN Users   ⓘ 10+50 = 60 (max:100) Expiry Date  Never  On  📅

- 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**.

12. Click **Provision**.
13. 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 <b>Active</b> 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 MSSP services.
- Use the MSSP Monthly licensed units in closed network scenario's.

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



# Interpreting the Monthly Products Table

From the **Monthly Products** table, you can perform the below list of operations.

Icon	Description
	Use the <b>Edit</b> icon to edit Tenant, and Product details. To edit Tenant details, point to the required Tenant name in the table and click <b>Edit</b> icon.
	Use the <b>More Actions</b> icon to:
	<ul style="list-style-type: none"><li>• <b>Edit Product Provisioning</b></li></ul>
	<ul style="list-style-type: none"><li>• Connect to <b>CSC Console</b></li></ul>
	<ul style="list-style-type: none"><li>• <b>Download</b> the Products details into CSV or XLS format.</li></ul>
	<ul style="list-style-type: none"><li>• <b>Transfer</b> the Product to another Tenant.</li></ul>
	<ul style="list-style-type: none"><li>• <b>Delete</b> the Product.</li></ul>
	<ul style="list-style-type: none"><li>• <b>Remove from MSSP Monthly.</b></li></ul>

## Editing Tenant or Product Details

Topics:

- [Editing Tenant Details](#)
- [Editing Product Details](#)

## Editing Tenant Details

**To edit Tenant details:**

1. Navigate to **Monthly Billing | Monthly Products**.
2. Hover over the **Tenant** name to be edited in the table and click **Edit** icon.

TENANT	FRIENDLY NAME	SERIAL NUMBER	PRODUCT	SERVICE	LICENSED UNITS	EXPIRY DATE	STATUS	ACTION
SonicWall Products Techpub MSW	SMATesting	0040103E2713	Secure Mobile Access 8200v	Central User Licenses	20	Never	Active	...

3. Make the necessary changes and click **Save**.

## Editing Product Details

### To edit Product details:

1. Navigate to **Monthly Billing | Monthly Products**.
2. Under **ACTION** column, click **Edit Product Provisioning** icon in the table for editing the **Product**.

TENANT	FRIENDLY NAME	SERIAL NUMBER	PRODUCT	SERVICE	LICENSED UNITS	EXPIRY DATE	STATUS	ACTION
SonicWall Techpub India1 Products Techpub MSW	SMATesting	0040103E2713	Secure Mobile Access 8200v	Central User Licenses	20	Never	Active	...
Techpub MSW1	Trial	0040103E2721	Secure Mobile Access 8200v	Central User Licenses	10	Never	Active	<ul style="list-style-type: none"> <li>Edit Product Provisioning</li> <li>Download CSV</li> <li>Download XLS</li> <li>Transfer</li> <li>Delete</li> </ul>
111 sadaf	Capture Client - Techpub MSW1	CC000002B335	Capture Client	Advanced	No upper limit	Never	Active	...

3. Update the provisioned details of the Product as required.
4. Click **Save**.

## Deleting Product

### To delete Product:

1. Navigate to **Monthly Billing | Monthly Products**.
2. Under **ACTION** column, click **More Actions** icon in the table.
3. Click **Delete** icon to delete the product.

TENANT	SERIAL NUM...	FRIENDLY NA...	FIRMWARE	PRODUCT	SERVICE	UNITS	STATUS	START DATE	EXPIRY DATE
tenant7	C0EAE40087A7	DEV-testCloudEdge		Cloud Edge	Cloud Edge - Total Secure	45	ACTIVE	01/27/2022	Never
TestTenantEdit	00401001133D	Authcodetest		Hosted Email Security	Hosted Email Security - Advanced	12	ACTIVE	03/10/2022	Never
	0040103E1907	TestAuthcode	7.0.0	NSv Virtual Firewall 270	NSv Virtual Firewall 270 - Fireportal	13	ACTIVE	03/08/2022	04/30/2022
	0040103E1B02	Authcodetest	7.0.0	NSv Virtual Firewall 470	NSv Virtual Firewall 470 -	30	ACTIVE	03/10/2022	03/31/2022

4. Select the reason for deleting the product and click **Delete**.

## 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 or XLS format.

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

# Access Management

Access Management helps define and control the role based access and permissions for the users.

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

- List of **Users**
- **Scope** of access for the users
- Role based **Permissions**

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

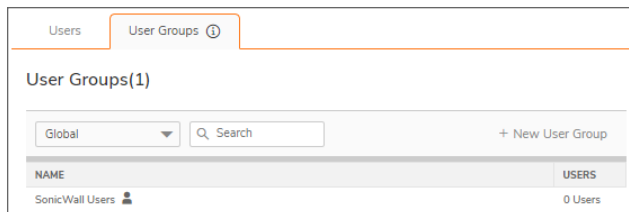
- Filter and customize the user table data
- Invite a new user
- Define or modify the Monthly Billing permissions of the user
- Update 2FA and External IDP for the user
- Generate an API key
- Delete an existing user

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

- Create a new user group
- Add or remove the users from the user group
- 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 **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 Access Management](#)
- [Quick Filter](#)
- [Customizing Columns](#)
- [Inviting a New User](#)
- [Modifying the Monthly Billing Permissions](#)
- [Interpreting the Users Table](#)
- [Creating a New User Group](#)
- [Adding the Users to the User Group](#)
- [Removing the User from the User Group](#)
- [Defining or Modifying the Scope](#)
- [Modifying the User Group Permissions](#)

## Options for the Access Management

Icon	Description
	Use the <b>Quick Filter</b> 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 <b>Search</b> icon to filter the table data with a specific string.
	Use <b>Generate My API Key</b> icon to generate an API key.
	Use <b>View My API Key</b> icon to view the API key details, but you cannot view the complete API key.
	Use the <b>Customize Columns</b> icon to show or hide <b>TYPE</b> , <b>ACCESS SCOPE</b> , <b>USER GROUP</b> , <b>ORGANIZATION</b> , <b>MSSP NAME</b> , and <b>MSSP PERMISSION</b> details.

# Quick Filter

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

## To filter data by Quick Filter:

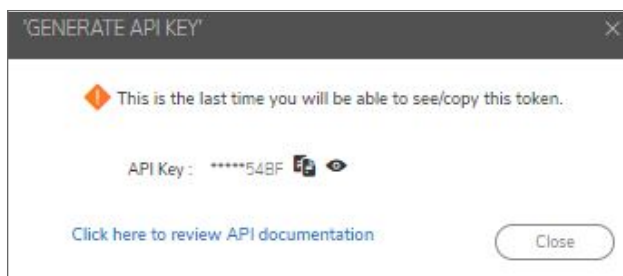
1. Click the **Quick Filter** icon and check the required boxes under each filter group.
2. Click **Apply**.
3. Click the **Search** icon and type the specific string to reduce the number of results being displayed.  
① **NOTE:** You can use the **Search** icon either individually or in combination with the **Quick Filter** groups.

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

# Generating MSW API Key

## To generate MSW API key:

1. Navigate to **Monthly Billing | Access Management > Users** or **My Workspace | User Groups > User list**.
2. Click **Generate My API Key** on top of the table.
3. 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.
4. Click **Confirm**.
5. 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.

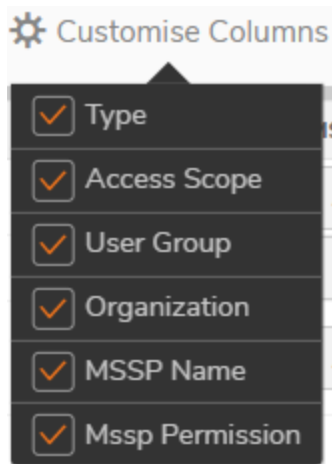
6. Click **Close**.

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 in MySonicWall.

## Customizing Columns

You can customize the table to show or hide **TYPE, ACCESS SCOPE, USER GROUP, ORGANIZATION, MSSP NAME**, and **MSSP PERMISSION**. By the default, these details are shown in the **Users** table. To hide them in the table, click **Customize Columns** icon on top of the table and uncheck the boxes for the required details.



## Inviting a New User

*To invite a new user:*

1. Navigate to **Monthly Billing | Access Management > Users**.
2. Click **Invite New User**.
3. Select the **User Group** under which you want to add the invited user.
4. Select the **Contact Type**. You can invite the user as **Partner, Employee, or Customer**.
5. Enter **Email Address, First Name, and Last Name** of the user.
6. Click **Invite**.

# Modifying the Monthly Billing Permissions

*To modify the monthly billing permissions:*

1. Navigate to **Monthly Billing | Access Management > Users**.
2. Modify the **Monthly Billing** permission of users as required under **MSSP PERMISSION** column. If the **MSSP PERMISSION** column is not visible in the table, include according to [Customizing Columns](#).




Permission Typ	Permissions
<b>ADMIN</b>	This user can view, provision, edit, and delete monthly products and services.
<b>READ-ONLY</b>	This user can view the Monthly Billing screens but cannot modify monthly products and services.
<b>NO ACCESS</b>	This user does not have the ability to view the Monthly Billing screens or modify any monthly products.

① | **NOTE:** By the default, all MSSP users get **ADMIN**.

## Interpreting the Users Table

From the **Users** table, you can perform the below list of operations.

On the **Users** tab > **ACTIONS** column, hover over the required user.

Icon	Description
	Use the <b>Delete</b> icon to delete an existing user from the account
	Use the <b>Lock</b> icon to turn ON or OFF the 2FA mode
	Use the <b>IDP</b> icon to enable or disable external IDP for the user

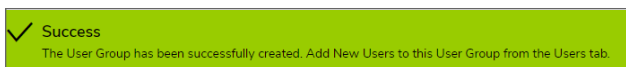
## Creating a New User Group

*To create a new user group:*

1. Navigate to **Monthly Billing | Access Management > User Groups**.
2. Select the **MSSP** from the drop-down menu under which you want to create a new user group.



3. Click the **New User Group (+)** icon.
  4. Enter a name for the new user group.
  5. Click the **Tick** mark next to the **Name** box.
- On successful User Group creation, you get **Success** notification.



## Adding the Users to the User Group

### *To add users to the user group:*

1. Navigate to **Monthly Billing | Access Management > User Groups**.
2. Select the **MSSP** from the drop-down menu.
3. Select the required **User Group** from the menu.  
**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](#).
4. In the **Users** section, click **+ Add User**.
5. Check the **Available users** boxes from the list and click **Add** for existing users.
6. 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 the User from the User Group

### *To remove user from the user group:*

1. Navigate to **Monthly Billing | Access Management > User Groups**.
2. Under **Users** section, click the **Delete** icon of the user to be removed from the user group.

## 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. Navigate to **Monthly Billing | Access Management > User Groups**.
2. Select the **User Group** from the drop-down menu.  
**NOTE:** Use **Search** option to filter the required user group from the list if required.

3. In the **Scope** section, click **Edit**.
4. Do one of the following to include or exclude in the User Group:
  - Select **MSSP** to include all the Tenants created under the specific MSSP.
  - Select **Tenant** and check to include individual Tenants.
    - ① | **NOTE:** Use **Search** option to filter the required Tenants from the list if required.
5. Click **Save**.

## Modifying the User Group Permissions

### *To modify the user group permissions:*

1. Navigate to **Monthly Billing | Access Management > User Groups**.
2. Select the required **User Group** from the drop-down menu.
  - ① | **NOTE:** Use **Search** option to filter the required user group from the list if required.
3. In the **Permissions** section, click **Edit**.
4. Set the permissions as required.

By the default, **Admin** access is provided for all User Groups. You can modify the permissions as required.
5. Click **Save**.

# License Report

Navigation: **Monthly Billing** | **License Report**

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

The **License Report** is available on the 1<sup>st</sup> of every month at 12:00 AM UTC for the previous months billed quantities. The report includes Billing Month, Snapshot Date, Tenant, Friendly Name, Serial, Product, Service, SKU#, SKU Description, and Billed Quantity for each procured product. The **License Report** is **NOT** an invoice. The License 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 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. MSPs and MSSPs need to know their licensed products so they can bill their customers properly and the License Report is how they can receive that information on the 1<sup>st</sup> of every month.

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

From the **License 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 Tenant.

## Default page:






The **License 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 License Report](#)
- [Quick Filter](#)
- [Generating the Monthly License Report](#)
- [Sorting the Table Data](#)
- [Exporting the Table Data](#)

# Options for License Report

Icon	Description
	Use the <b>Quick Filter</b> icon to filter the table data for specific results according to <b>Quick Filter</b> 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 <b>Drop-down</b> icon to select a specific Tenant from the list.
	Use the <b>Search</b> icon to filter the table data with a specific string.
	Use the <b>Export</b> icon to export the table data into CSV or XLS format.
	Use the <b>Refresh</b> icon to get the most recent data in the table.

# Quick Filter

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



## FILTER GROUPS

Group Name	Description
<b>PRODUCTS</b>	The <b>PRODUCTS</b> group displays the list of products available under Monthly Billing.
<b>SERVICES</b>	The <b>SERVICES</b> group displays the complete list of services available for the products listed under <b>PRODUCTS</b> group.
<b>UNITS</b>	The <b>UNITS</b> group gives an opportunity to enter the minimum and maximum number of units.
<b>SKU</b>	The <b>SKU</b> group gives an opportunity to filter the product by SKU.

### To Filter Data by Quick Filter:

1. Click the **Quick Filter** icon available at top left corner of the table.
2. Select the required filter options.
3. Click **Apply** to set the filter preferences only for this time, otherwise, click **Save & Apply** to set and save the filter preferences for next time log in.  
**NOTE:** Saved filter preferences are applied until you choose to **Clear** and **Save & Apply**.
4. Click **Clear** to reset the filters.

### **NOTE:**

- To show or hide the filter groups at any point, click the **Quick Filter** icon available at top-left corner of the table.
- If none of the filter group is selected from the **Quick Filter**, the table displays the details for all filter groups.

# Generating the Monthly License Report

Navigation: **Monthly Billing** | **License Report**

## *To generate a monthly report:*

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



### **NOTE:**

- You can select a month or multiple months for the selected year.
- You can filter and view the license report for any month in the last 24 months.

## 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 or XLS format.

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

# 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. To access the Support Portal, go to <https://www.sonicwall.com/support>.

The Support Portal enables you to:

- View knowledge base articles and technical documentation
- View and participate in the Community forum discussions at <https://community.sonicwall.com/technology-and-support>.
- View video tutorials
- Access <https://mysonicwall.com>
- Learn about SonicWall Professional Services at <https://sonicwall.com/pes>.
- Review SonicWall Support services and warranty information
- Register for training and certification
- Request technical support or customer service

To contact SonicWall Support, visit <https://www.sonicwall.com/support/contact-support>.



# About This Document

MySonicWall MSSP Monthly Billing Feature Guide  
Updated - February 2024  
232-005846-00 Rev F

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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

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