MySonicWall

User Guide

SONICWALL®

Contents

User Activity Log

The **User Activity Log** page summarizes the activity log details in a tabular form for all types of activities performed by the user on all Tenants, Users, Products, and Services registered and shared with your MySonicWall account. From the **User Activity Log** page, you can filter the activities with all possible combinations for last 30 days or any custom duration, not exceeding 30 days. You can also customize and sort the filtered activity log details to identify the specific results.

Default page:

- The **User Activity Log** page summarizes the activity log details in a tabular form for last 30 days for all types of activities performed on users registered and shared with your MySonicWall account. The **User Activity Log** table includes **ACTIVITY TIME**, **ACTIVITY USER NAME**, **EMAIL ADDRESS**, **ACTIVITY**, **ACTIVITY DETAILS**, **TENANT**, **SERIAL NUMBER**, and **SOURCE**.

- **IP ADDRESS** and **USER ORGANIZATION** are not included in the **User Activity Log** table. To include them in the table, click **Settings** icon on top of the table, and then check the boxes for the **IP ADDRESS** and **USER ORGANIZATION**.

You can reset the table details to default, filter, and customize the table details with the help of the icons, buttons, and drop-down menus available on top of the table.

Topics:

- Quick Filter
- Filter Options for the User Activity Log
- Filtering by Activity Type or Activity
- Customizing the User Activity Log
- Sorting the User Activity Log

Quick Filter

Use the **Quick Filter** option if you are looking for activities of any one of the groups or combination of the groups listed below.

FILTER GROUPS

Group Name	Description
TENANTS	The **TENANTS** group displays the complete list of registered and shared tenants under your MySonicWall account. Search or select the required Tenant group from the list to get activities of the users belong to the Tenant.
USERS	The **USERS** group displays the complete list of registered and shared users under your MySonicWall account. Search or select the specific user or users for the selected **TENANTS** group from the list to get the activity log details. Check the boxes of the users to be included.
SERIAL NUMBERS	The **SERIAL NUMBERS** group displays the complete list of serial numbers of the appliances assigned to the registered and shared users under your MySonicWall account. Search or select the specific serial number from the list for which you want to list the activity log details.
SOURCES	The **SOURCES** group displays the complete list of sources of the appliances assigned to the users. Search or select the required source or sources from the list to get activity log details. Check the boxes of the sources to be included.
IP ADDRESS	The **IP ADDRESS** group displays the complete list of IP Addresses of the appliances assigned to the users. Search or select the specific IP address of the appliance assigned from the list for which you want to get activity log.

To filter data by Quick Filter:

1. Click the **Quick Filter** icon available at top left corner of the table.

   (i) **NOTE:** By default, the **IP ADDRESS** is not included as filter group. To include the **IP ADDRESS** as filter group, click **Settings** icon on top of the table and then check the box for the **IP ADDRESS**.

2. Reduce the number of activity log records being displayed in one of the following ways:

   - Select any one of the filter options.

   - Type a search string in one of the fields provided.

3. Set the required duration from top of the table. By default, **Last 30 days** option is selected. You can set the custom duration for any period (not exceeding 30 days) by selecting the **Custom: Max 30days** option.

4. Click **Apply** to get the activity details.

5. Click **Clear** to clear the filter selection.

(i) **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 activity table displays the details for all filter groups.

Filtering by Activity Type or Activity

Filtering by the **Activity Type** or **Activity** helps you to find the specific type of activity performed on the Tenants, Users, and Usergroups registered in your MySonicWall account.

Examples:

- If you want list the software downloaded in last 30 days, select the **Download Center** as Activity Type, **Download Software** as Activity, the **Last 30 days** option for duration and then click **Filter**. The table displays the list of software downloads in last 30 days. Here in this example, only one option is available for Activity, so even if you leave the Activity as **All**, the activity table list the same results.

- Consider another example where you have more options for Activity. To list the products registered in last 10 days, select the **Product** as Activity Type, **Register Product** as Activity, set custom duration range, not exceeding 30 days) and then click **Filter**. The activity table displays the list of the products registered for the selected range.

To filter data by Activity Type or Activity:

1. Set the required Quick Filters per Quick Filter. If you are looking for activity details for all filter groups- **TENANTS**, **USERS**, **SERIAL NUMBERS**, **SOURCES** and **IP ADDRESS**, leave all the filter groups unselected or click **Clear**.

2. Select the required **Activity Type** and **Activity** from the respective drop-down lists.

   ⓘ | **NOTE:** Refer to the below table for Activity Type and its associated Activities.

Activity Type	Activity
Download Center	Download Software
Product	Associate Product
	Claim Product
	De-enroll in Master MSSP
	Delete Product
	Download Preference File
	Enroll in Master MSSP
	Manage GUID
	Register Product
	Register Trial Product
	Remove Association
	Rename Product
	Request NFR
	Secure Upgrade From
	Secure Upgrade To
	Transfer Product
	Update Firmware Version
	Update Hosted Email Security Password
	Update Managed by Option
	Update Partner Info
	Update Zero Touch
Service	Activate Service

Activity Type	Activity
Tenant	Add Product to Tenant
	Add Usergroup to Tenant
	Delete Tenant
	Provision Tenant
	Remove Product from Tenant
	Remove Usergroup from Tenant
	Rename Tenant
	Set Default Tenant
	Update Tenant Address
	Update Tenant Star
User Activity	Account LockedOut
	Login
	Logout
	Unusual Login
	User Signup
Usergroup	Add Tenant to Usergroup
	Add User to Usergroup
	Delete Usergroup
	Invite User
	Provision Usergroup
	Remove Tenant from Usergroup
	Remove User from Usergroup
	Rename Usergroup
	Set Default Usergroup
	Update Usergroup Permission
User Profile	Change Password
	Delete Contact
	Edit Address
	Reset Password
	Update Alerts
	Update Email Address
	Update Preferences
	Update Profile
	Update TFA Mode
	Update TimeZone

3. Select the duration as **Last 30 days** or set the custom duration range by selecting **Custom (Max 30days)** (range should not exceed 30 days).

4. Click the **Settings** icon on top of the table and then check the boxes of the **IP Address** and/or **User Organization** if you want to include them in the filter results.

5. Click **Filter** to list the results.

6. Click the **Refresh** icon to reset or clear the filter selection.

Customizing the User Activity Log

You can customize the **User Activity Log** table to include or exclude the **IP Address** and/or **User Organization** details in the filter results. By default, the **IP Address** and **User Organization** are not included in the **User Activity Log** table. Click **Setting** icon and then check the boxes of the **IP Address** and/or **User Organization** to add them.

Sorting the User Activity Log

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

Download Center By Version

The **Download Center By Version** 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.

Default page:

The **Download Center By Version** page displays a blank **Download Center (Beta)** screen with **Product name** box.

Topics:

- Eligibility Criteria
- Filter Options for the Download Center
- Downloading Set-up Files for Eligible Active Products
- Viewing Set-up Files for Non-registered Products

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.

Filter Options for the Download Center

Icon	Description
	Use the **Quick Filter** icon to list the set-up files and release notes based on the **LANGUAGE**, **RELEASE TYPE** and **RELEASE DATE** filters. You can apply these filter groups individually or in combination to find the specific details.
	Use the **Search** icon to search for any specific product
	Use **Information** icon to know more information on the column data
	Use the **View** icon to view the Release notes in the browser.
	Use the **Download** icon to download the set-up files or Release notes
	Use the **Arrow** icon to show or hide the details
	Download is restricted

Downloading Set-up Files for Eligible Active Products

1. Click **Product name** box and perform in one of the following ways:

   - Enter name of the product in **Search for product** box.

   - Enable the **Show my products** option to list the 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 **Quick Filter** and **Search** icons are enabled at top left corner of the table.

2. Click the **Quick Filter** icon.

3. Select the required filters for **LANGUAGE**, **RELEASE TYPE**, and **RELEASE DATE** and click **Apply**, which displays the selected active filters on top of the table.

4. Click **Close** (x) to remove the filter.

5. Click the **Search** icon and type a search string if you are looking for any specific product release.

6. Enable the **Show latest available downloads** option on top of the table to list the latest available software to download.

7. Click the major release number and navigate to the required software release, which displays a table with **NAME** of the product, **RELEASE DATE**, **LANGUAGE** of the files, **TYPE** of release, and **FILES**.
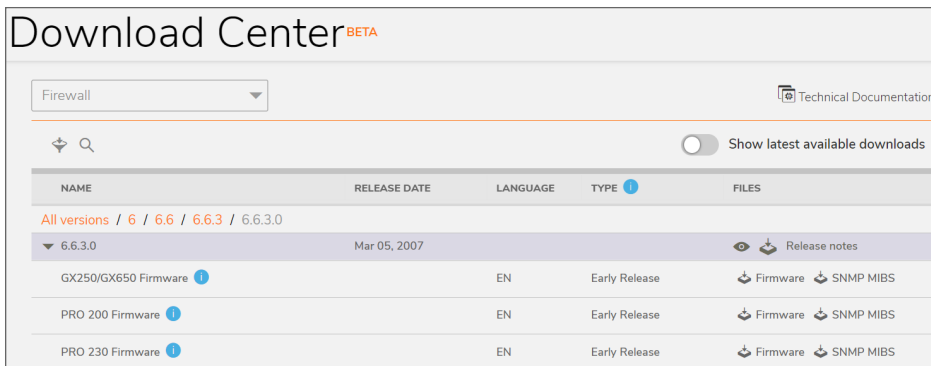
8. Point to the **Information** icon in the **NAME** column to view statistics of the particular release set-up files.

9. Click **Close** (x) to close the statistics information.

10. Click the **Information** icon next to the **TYPE** heading to know the different types of releases and their definitions.

11. 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.

12. Click the **View** icon to view the Release notes in the browser.

13. Click the **Arrow** icon of the release in the table to show or hide the details.

Viewing Set-up Files for Non-registered Products

In addition to the registered active products, the **Download Center By Version** displays set-up files for all non-registered products (other products) that SonicWall has released till date. For non-registered products (other products), you can only view the set-up files of the software, but the download is restricted.

Notification Center

The **Notification Center** page lists the notifications of the products registered and shared with your MySonicWall account. From the **Notification Center** page, you can pin, delete, and sort the notifications.

Topics:

- Filter Options for the Notification Center
- Quick Filter
- Notification Types
- Interpreting the Notification Center Table
- Sorting the Notification Center Table

Filter Options for the Notification Center

Icon	Description
	Use the **Quick Filter** icon to filter the table data for a specific results per **TYPE**, **CATEGORY**, **DURATION**. 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 the **Refresh** icon to refresh the table data per selected filter groups.

Quick Filter

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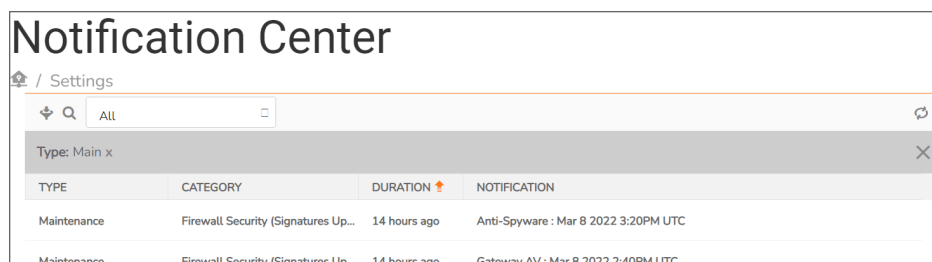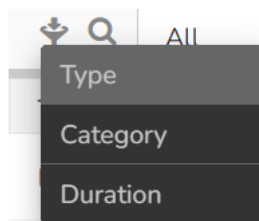
FILTER GROUPS

Group Name	Description
TYPE	The **TYPE** group displays the list of notifications of a specific type. For more details, refer to Notification Types.
CATEGORY	The **CATEGORY** group displays the list of notifications of a specific type of category. For example, Firewall Security, New Software and Firmware.
DURATION	The **DURATION** group displays the list of notifications received for a specific time period: for example, 2 hours or 13 days.

To filter data by Quick Filter:

1. Select the filter groups in one of the following ways:

   ⓘ | **NOTE:** You can include all three filter groups - **TYPE**, **CATEGORY**, **DURATION** if required.
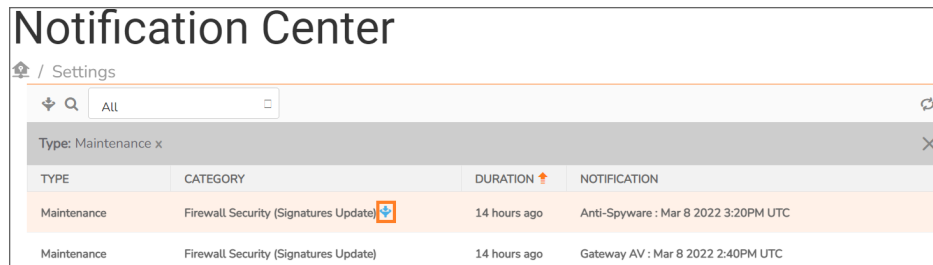
   - Click the **Quick Filter** icon and select any single group. Type a search string in the field and click outside the field to add filter.

   - In the **Notification Center** table, point to description of the required filter group - **TYPE** or

CATEGORY or **DURATION** and click the **Add Filter** icon.

Notification Center

⌂ / Settings

	TYPE	CATEGORY	DURATION ↑	NOTIFICATION
Type: Maintenance x				
	Maintenance	Firewall Security (Signatures Update)	14 hours ago	Anti-Spyware : Mar 8 2022 3:20PM UTC
	Maintenance	Firewall Security (Signatures Update)	14 hours ago	Gateway AV : Mar 8 2022 2:40PM UTC

2. Repeat the step 1 to include the remaining **Quick Filter** groups.

3. Click the **Search** icon and type the specific string to reduce the number of notifications being displayed.

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

4. Select the required **CATEGORY** from the drop-down list next to **Search** icon.

5. Click the **Refresh** icon to filter the data per selected filters.

6. Click **Close** (X) of the respective filter group to remove.

7. Click **Close** (X) on right side of the active filters row to remove all the active filter groups.

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

Notification Types

All MySonicWall notifications are categorized, and grouped per below table.

Type	Notifications Related To
Maintenance	Firewall security
All SonicWall Products	SonicWall products
SonicWall Security Center	Product security of the user owned products
New Software and Firmware Upgrades	Release of a new software, or firmware, or upgrade of the user owned products
Security Notices	Common security issues
New Product and Feature Releases	New releases made on a product, or a feature of the product
Site and Infrastructure Updates	Downtime, or service interruptions due to upgrade of a site, or infrastructure
Firewall Security	Security of the user owned firewall appliances
Security Community	Security community portal
SonicWall Threat Protection	Threat protection on the SonicWall devices
RM Partner Notification	Renewal Manager for partner

Interpreting the Notification Center Table

From the **Notification Center** table, you can navigate to **Download Center**, **Pin**, or **Delete** the notifications.

ⓘ | **NOTE:** You cannot perform **Pin** , **Delete**, navigate to **Download Center** on the **Maintenance** type notifications.

Icon	Description
	Use the **URL** icon to navigate to the **Download Center** with pre-defined filters.
	Use the **Pin** icon to show the notifications at top of the table until you choose to unpin them.
	Use the **Delete** icon to delete the notification from the table.

Sorting the Notification Center Table

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

4

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 MySonicWall account.

Download Signature

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

Signature ID: 3 ▼

Update Signatures manually for version until 7.0.0

Applicable Products: NSa 2650 , NSA 2700 , NSa 3650 , NSa 4650 , NSA 4700 , NSa 5650 , NSa 9250 , NSa 9450 , NSv 200 HyperV , NSv 25 , NSv 270 , NSv 300 , NSv 400 Azure , NSv 800 , NSv 800 AWS , NSv Trial Expired , TZ 370 , TZ 370W , TZ 470 , TZ 470W , TZ600P , WAF

Available Download

Click here to download the Signature File

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.

   ## Download Signature

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

   Signature ID: 3 ▾

       3
       6
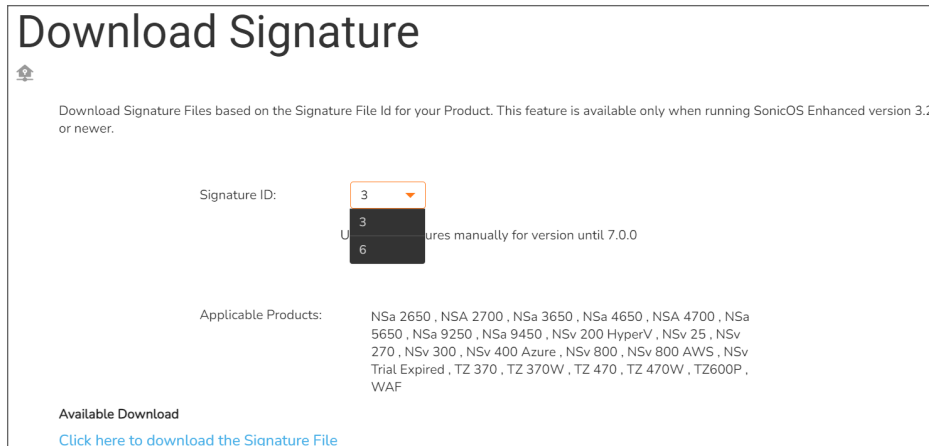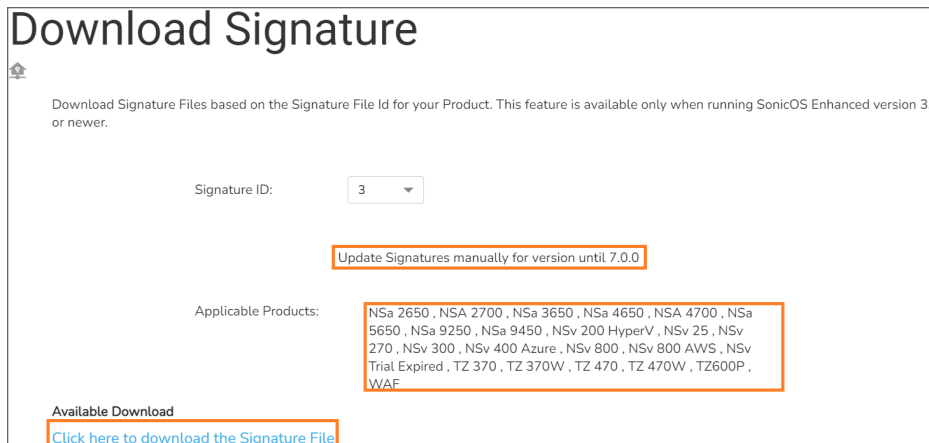   U   ures manually for version until 7.0.0

   Applicable Products: NSa 2650 , NSA 2700 , NSa 3650 , NSa 4650 , NSA 4700 , NSa 5650 , NSa 9250 , NSa 9450 , NSv 200 HyperV , NSv 25 , NSv 270 , NSv 300 , NSv 400 Azure , NSv 800 , NSv 800 AWS , NSv Trial Expired , TZ 370 , TZ 370W , TZ 470 , TZ 470W , TZ600P , WAF

   Available Download

   Click here to download the Signature File

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

   ⓘ **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 here to download the Signature File** to download the signature file.

   ## Download Signature

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

   Signature ID: 3 ▾

   Update Signatures manually for version until 7.0.0

   Applicable Products: NSa 2650 , NSA 2700 , NSa 3650 , NSa 4650 , NSA 4700 , NSa 5650 , NSa 9250 , NSa 9450 , NSv 200 HyperV , NSv 25 , NSv 270 , NSv 300 , NSv 400 Azure , NSv 800 , NSv 800 AWS , NSv Trial Expired , TZ 370 , TZ 370W , TZ 470 , TZ 470W , TZ600P , WAF

   Available Download

   Click here to download the Signature File

NFR Services

The **NFR Services** page shows the list of products purchased under NFR SKU and the regular products which are eligible to convert to **NFR Services**.

From the **NFR Services** page, you can:

- Extend the **NFR Services** of the eligible products which are due to expire within next 90 days for an additional six months or any custom duration, not exceeding six months.

- Convert the eligible regular products into **NFR Services**.

- View history of the **NFR Services** extension.

ⓘ | **NOTE:** The product is not eligible for **NFR Services** extension if the product box is shaded. You can find the reason under **DESCRIPTION** column.

Topics:

- Filter Options for the NFR Services
- Quick Filter
- Applying NFR Services
- Viewing NFR Request History
- Sorting the NFR Services Table

Filter Options for the NFR Services

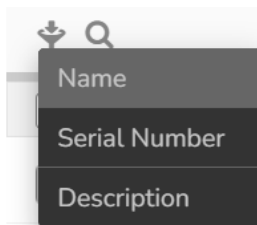| Icon	Description
	Use the **Quick Filter** icon to list products per **NAME**, **SERIAL NUMBER**, **DESCRIPTION**. You can apply these filter groups individually or in combination to find the specific details.
	Use the **Search** icon to filter the table data with a specific string.
	Use the **Refresh** icon to refresh the table data per selected filter groups.

Quick Filter

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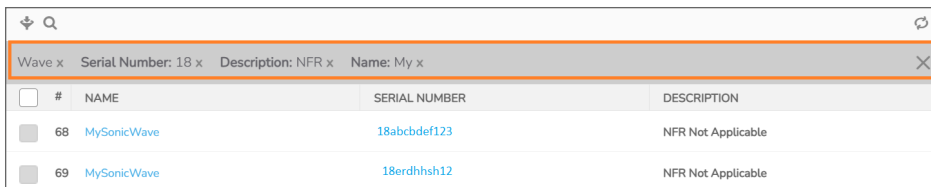
FILTER GROUPS

Group Name	Description
NAME	The **NAME** group displays the list of products with a specific name.
SERIAL NUMBER	The **SERIAL NUMBER** group displays the product with a specific serial number.
DESCRIPTION	The **DESCRIPTION** group displays the list of products with a specific description.

To filter data by Quick Filter:

1. Click the **Quick Filter** icon and select any single group.

2. Type a search string in the field and click outside the field to add filter.

3. Repeat the steps 1 and 2 to include the remaining **Quick Filter** groups.

    ⓘ **NOTE:** You can include all three filter groups - **NAME**, **SERIAL NUMBER**, **DESCRIPTION** if required.

4. Click the **Search** icon and type the specific string to reduce the number of notifications being displayed.

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

5. Click the **Refresh** icon to filter the data per selected filters.

6. Click **Close** (X) of the respective filter group to remove.

7. Click **Close** (X) at right side of the active filters row to remove all the active filters.

ⓘ | **NOTE:** The **NFR Services** table displays the results for all filter groups if none of the filter groups is selected from the **Quick Filter**.

Applying NFR Services

1. Select the required products boxes to apply for NFR extension or to convert to **NFR Services**.

   ⓘ | **NOTE:** Check the header row box to select all eligible products for NFR extension.

2. Click **Apply NFR**.

3. Click **Submit** to extend **NFR Services** for six months.

   ⓘ | **NOTE:** If you want to extend the **NFR Services** for any custom duration within six months, check the **Requested expiration date for Subscriptions** box, and set the **Expiration Date**.

Viewing NFR Request History

Click **View NFR History** to view the history of the NFR extension details. You can extend the **NFR Services** for any number of times.

ⓘ | **NOTE:** The **NFR Request History** does not show the history of the products purchased under NFR SKU.

Sorting the NFR Services Table

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

6

Renewal Manager

The **Renewal Manager** generates the quotes for the products which are due to expire in next 180 days. From the **Renewal Manager**, you can quickly identify the status of the quote with color of the status text.

Color	Status	Description
Blue	Due	The contract is active and the service is due for renewal in the next 60-90 days
Orange	Urgent	The contract is active and the service is due for renewal in the next 30-60 days
Red	Overdue	The contract is active and the service is due for renewal in the next 30 days
Gray	Expired	The contract is expired

The generated quote gets updated dynamically if any product of the quote is renewed, or cancelled through other channels.

From the **Renewal Manager** table, you can:

- Filter, refresh, and export the quote details.
- Switch between Reseller Managed, and Program Managed
- View quote activity, and quote notes.
- View active, pending, and expired quotes from the **Opportunity** tab.
- View **Booked**, and **Cancelled** quotes from the respective tabs.

Default page:

The **Renewal Manager** page shows the **Opportunity** tab with list of quotes generated for the products which are due to expire in next 180 days.

Topics:

- Options for the Renewal Manager
- Quick Filter
- Interpreting the Renewal Manager Table
- Viewing Quote - Activities, and Notes
- Switching between the Reseller and Program Managed
- Sorting the Table Data
- Exporting the Table Data
- Viewing the Quote Details
- Checking out the Quote

Options for the Renewal Manager

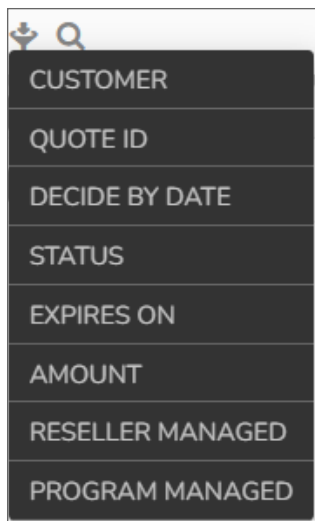| Icon	Description
	Use the **Quick Filter** icon to filter the table data for a specific results. You can apply these filter groups either individually or in combination to find the specific notification results.
	Use the **Search** icon to filter the table data with a specific string.
	Use the **Refresh** icon to refresh the table data per selected filter groups.
	Use the **Export** icon to export the table data into CSV format.
	Use the **Create New Note** icon to create and add a new note for the quote.
	Use the **Return** icon to go back to previous window.

Quick Filter

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

To filter data by Quick Filter:

1. Select the filter groups in one of the following ways:

    *   Click the **Quick Filter** icon and select any single group. Type a search string in the field and click outside the field to add filter.

        ⓘ | **NOTE:** You can include all filter groups if required.

    *   In the **Renewal Manager** table, point to required **QUOTE ID**, or **EXPIRES ON** column details, and click the **Add Filter** icon.

2. Repeat the step 1 to include the remaining **Quick Filter** groups.

3. Click the **Search** icon and type the specific string to reduce the number of notifications being displayed.

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

4. Click the **Refresh** icon to filter the data per selected filters.

5. Click **Close** (X) of the respective filter group to remove.

6. Click **Close** (X) on right side of the active filters row to remove all the active filter groups.

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

Interpreting the Renewal Manager Table

From the **Renewal Manager** table, you can navigate to the **Quote Activity**, and **Quote Notes**.

Icon	Description
⩗	Use the **Quote Activity** icon to view the activities performed on the quote. From the **Quote Activity**, you can filter, refresh, and sort the data.
🗒	Use the **Quote Notes** icon to view the notes added for the quote. From the **Quote Notes**, you can add new notes, filter, refresh, and sort the existing data.

Viewing Quote - Activities, and Notes

1. Point to row of the required quote in the table, and click the **Quote Activity**, or **Quote Notes** icon at end of the row.

2. Filter the table data in one of the following ways:

   - Click the **Quick Filter** icon and select any single group. Type a search string in the field and click outside the field to add filter.

      ⓘ **NOTE:** You can include all filter groups if required.

   - Point to description of the required filter group, and click the **Add Filter** icon.
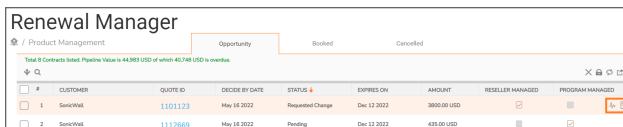
3. Repeat the step 2 to include the remaining **Quick Filter** groups.

4. Click the **Search** icon and type the specific string to reduce the number of notifications being displayed.

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

5. Click the **Refresh** icon to filter the data per selected filters.

6. Click **Close** (X) of the respective filter group to remove.

7. Click **Close** (X) on right side of the active filters row to remove all the active filter groups.

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

Topics:

- Adding Quote Notes
- Sorting the Table Data

Adding Quote Notes

1. Point to row of the required quote in the table, and click the **Quote Notes** icon at end of the row.

2. Click the **Create New Note** (+) icon to create, and add a new note to the quote.

3. Select the **Quote ID** from the drop-down list, type the **Note** description, and click **Save**.

Sorting the Table Data

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

Switching between the Reseller and Program Managed

When the quote is generated, it gets generated for Reseller to manage. If the Reseller does not take any action, quote gets changed to Program managed after 75 days where customer can take action.

Reseller managed	Reseller manages the opportunity if the reseller has marked the opportunity in the reseller portal as Reseller Managed.
Program managed	SonicWall inside Sales team manages the opportunity on behalf of the reseller if the reseller has marked the opportunity in the reseller portal as Program Managed.

At any time, you can switch between the Reseller and Program Managed.

To switch a quote between the Reseller and Program managed:

Check the box in the **RESELLER MANAGED** or **PROGRAM MANAGED** columns for the required quote.

To switch multiple quotes:

- From Reseller managed to Program managed, check the boxes of the required quotes, and click the **Close** icon on top of the table.

- From Program managed to Reseller managed, check the boxes of the required quotes, and click the **Lock** icon on top of the table.

Sorting the Table Data

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

Exporting the Table Data

Check the boxes of the required rows, or leave all the boxes unselected to export complete table data, and click the **Export** icon.

Viewing the Quote Details

To view the quote details, navigate, and click the required **QUOTE ID** in the **Renewal Manager** table.

The **RENEWAL MANAGER QUOTE DETAILS** window gives you the following information:

- Quote information.
- Sales representative details.

- Reseller details.

- Items in quote.

- Checkout instructions.

From the **RENEWAL MANAGER QUOTE DETAILS** window, you can:

- **Email Quote** to registered email IDs, or different Email addresses registered with MySonicWall.

- Export the **ITEMS IN QUOTE** into CSV format.

- Search for the required **ITEMS IN QUOTE**.

- Opt-in, or opt-out for the **AUTO RENEW** option for the required **ITEMS IN QUOTE**.

- **Remove**, or **Add Services** to the quote.

- **Split Quote**.

- **Print Quote**.

- **Decline Quote**.

- **Request Change** in quote.

- **Checkout** the quote for payment.

Topics:

- Emailing the Quote
- Exporting the Quote Table
- Searching the Quote Table
- Printing the Quote
- Adding or Removing the Auto Renew Option
- Adding the Services to the Quote
- Removing the Services from the Quote
- Splitting the Quote
- Declining the Quote
- Requesting the Change in Quote

Emailing the Quote

1. Click **Email Quote**.

2. Select Email option from **Email ID** drop-down list to send to the registered, or a different Email ID.

    - Select the registered Email ID available in the list.

    - Select **Do you want to use a different Email Address?** to enter a different Email address registered with MySonicWall.

3. Click **Email Quote**.

Exporting the Quote Table

Click the **Export** icon to export the **ITEMS IN QUOTE** into CSV format.

Searching the Quote Table

1. Click the **Search** icon, and type a search string.
2. Press **enter**.
3. Clear the search string to remove the filter.

Printing the Quote

1. Click **Print Quote** which opens the print preview in a separate tab.
2. Click **Print** at the right top corner.
3. Set print parameters, and click **Print**.

Adding or Removing the Auto Renew Option

Under **AUTO RENEW** column, check, or uncheck the boxes for required line items of the quote.

Adding the Services to the Quote

1. Click **Add Services**.
2. Select the **Serial Number**, **Service Name**, and **SKU** from the respective drop-down lists.
3. Click **Add** to add more services, else click **Add and Close** to add the selected service and close the **ADD SERVICES** window.

Removing the Services from the Quote

1. Do one of the following:
   - Under **Remove** column, click the **Delete** icon of the required line item of the quote.
   - Check the boxes of required line items of the quote, and click **Remove**.
2. Click **Confirm** in the **REMOVE ITEM** prompt.

Splitting the Quote

1. Check the boxes of required line items of the quote, and click **Split Quote**.

2. Edit the new quote as required.

3. Do one of the following:

    - Click **Checkout** to continue for payment.

    - Click the **Return** icon to go to Renewal Manager default page.

Declining the Quote

1. Click **Decline Quote**.

2. Select the **Cancellation Reason** from the drop-down list.

3. Click **Confirm**.

Requesting the Change in Quote

1. Make the necessary changes to the quote as required:

    - Adding the Services to the Quote.

    - Removing the Services from the Quote.

    - Splitting the Quote.

    - Adding or Removing the Auto Renew Option

    - Changing the renewal period if applicable.

2. Click **Request Change**.

3. **Enter the reason for Request Change**, and click **Confirm**.

Checking out the Quote

1. Click **Checkout**.

2. Verify the **Shopping Cart** items, and make the changes if required.

    - Update quantity of the items.

    - Opt-in, or opt-out for **Auto Renew** option.

    - Remove the cart items.

    ⓘ | **NOTE: Save Quote** if you do not want to continue **Checkout**.

3. Click **Checkout** to continue.

4. Verify the **Checkout - Billing** address details, and edit if required.

5. Uncheck **Save address for future transactions** box if you do not want to save the address for future transactions.

6. Enter **Checkout - Payment** details.

    ⓘ | **NOTE:**
    - You can make the payment through Card, or **E-Check**.
    - To make payment through E-Check, turn on **Pay using E-Check**.

7. Click **Continue**.

8. Verify **Checkout - Confirmation** details, edit the **Billing Information**, and **Payment Details** if required.

9. Check **I have read and agreed to all of the conditions for use** box.

10. Click **Place Order**.

Topics:

Saving the Quote

Saving the Quote

1. Click **Save Quote**.

2. Make the changes as required:

    - Update the preferences for **Purchase Mode**, address for future transactions.
    - **Change Address**.
    - Opt-in, or opt-out for **AUTO RENEW** option.
    - Remove the items in quote.

3. Click **Update Quote**.

    ⓘ | **NOTE:** You can also perform the following actions from **Edit Quote** window.
    - Emailing quote to the registered Email ID.
    - Printing the Quote.
    - Exporting the Quote Table.
    - Searching the Quote Table.

4. Do one of the following:

    - Click **Checkout** to continue for payment.
    - Click the **Return** icon to go to **Shopping Cart**.

MSSP Monthly

The MSSP Monthly feature helps:

- Master MSSP users to provision, manage MSSP, Tenant, and Product.
- Regular MSSP users to provision, manage Tenant, and Product.

The MSSP Monthly also helps generate the monthly license usage reports.

For more information, refer to respective feature guides listed below:

- Master MSSP Monthly Feature Guide
- MSSP Monthly Feature Guide

PSA Integrations

PSA Platform helps Service Providers managing their Customers and billing. Currently MySonicWall supports PSA Integration with ConnectWise Manage.

ConnectWise Manage

Navigation: **My Workspace**| **PSA Integrations > ConnectWise Manage**

ConnectWise Manage is a professional services automation platform dedicated in automating business processes. The Services Provider would like to manage the professional services for SonicWall products via standard PSA platforms like ConnectWise Manage. This solution allows the service provider to synchronize the SonicWall products alerts information to ConnectWise Manage, allowing them to manage the customers via the PSA platform.

This document describes how MySonicWall helps integrate product and services consoles with ConnectWise Manage (CWM) through MySonicWall. This integration helps automate the invoicing and billing of security services for service providers via ConnectWise Manage. In addition, the integration automates the creation and processing of service tickets within ConnectWise Manage, including the automatic closure of tickets when alerts are closed in the product consoles. For more information about the integration, refer to KB article, ConnectWise Manage Integration - Frequently Asked Questions.

To start integration with MySonicWall, refer to ConnectWise Manage Integration Guide.

External Identify Provider

This section provides the instructions to configure an external identity provider, Azure or Okta for your MySonicWall application.

Topics:

Configuring an External Identify Provider

Configuring an External Identify Provider

To configure an external identity provider for MySonicWall:

1. Log in to your MySonicWall account.
2. Navigate to **Settings > My Account > My personal profile**.
3. Enable **Use External Identity Provider** under **ADDITIONAL OPTIONS** group.
4. Select the Identity Provider Organization.
    *   Okta Configuration
    *   Azure Active Directory Configuration
5. Configure the external identity provider in one of the following ways:
    *   Select the check box and enter the **Service Provider Metadata URL** copied from the external Identify Provider (Okta or Azure AD) application.

        System automatically pull the relevant data and populates in the input fields. For more information about getting metadata URL, refer to below table.

IdP Protocol	Okta	Azure
SAML	Okta-SAML Metadata URL	Azure-SAML Metadata URL
OpenID Connect	Okta-OpenID Metadata URL	Azure-OpenID Metadata URL

    *   Manually select the identity provider protocol:

- Set **Authentication Type** as **Code** or **Token** for **OpenID Connect** protocol.
- Fill in the respective fields with information copied from external identity provider application. For more information, refer to the below table.

IdP Protocol	External IdP application information	Okta	Azure
SAML	SSO URL	Okta-SAML Manual Configuration Information	Azure-SAML Manual Configuration Information
	x509 Certificate		
OpenID Connect	Client ID	Okta-OpenID Manual Configuration Information	Azure-OpenID Manual Configuration Information
	Client Secret		
	Authorization URL		

6. Click **Connect & Save**.

Azure-SAML Metadata URL

To form metadata url:

1. Log in to Azure portal.
2. Click **View** under **Manage Azure Active Directory**.
3. Navigate to **Manage > Enterprise applications**.
4. Select the application.
5. Click **Single sign-on**.
6. Click the **Copy to clipboard** icon next to **App Federation Metadata Url** under **SAML Certificates** group.
7. Enter the copied Url in MySonicWall application to setup external identity provider.

Azure-SAML Manual Configuration Information

To get information from Azure-SAML application:

1. Log in to Azure portal.
2. Click **View** under **Manage Azure Active Directory**.
3. Navigate to **Manage > Enterprise applications**.
4. Select the application.
5. Click **Single sign-on**.
6. Click **Download** next to **Federation Metadata XML** under **SAML Certificates** group.

7. Open the downloaded XML file.

8. Search with **HTTP-POST**.

9. Copy the SSO URL as shown below.

10. Search with **KeyInfo**.

11. Copy the x509 Certificate as shown below.

12. Enter the copied SSO URL and x509 Certificate information in MySonicWall to setup external identity provider.

Azure-OpenID Metadata URL

To form metadata url:

1. Log in to Azure portal.

2. Click **View** under **Manage Azure Active Directory**.

3. Navigate to **Manage > App registrations** in the left navigation menu.

4. Select the application.

5. Click **Endpoints** on top of the page.

6. Click the **Copy to clipboard** icon next to **OpenID Connect metadata document**.

7. Enter the copied Url in MySonicWall application to setup external identity provider.

Azure-OpenID Manual Configuration Information

To get information from Azure-OpenID application:

1. Log in to Azure portal.

2. Click **View** under **Manage Azure Active Directory**.

3. Navigate to **Manage > App registrations** in the left navigation menu.

4. Select the application.

5. Copy and store the OpenID application information to enter in MySonicWall application.

Application Information	Description
Application (client) ID	Click **Overview**. Click the **Copy to clipboard** icon next to the **Application (client) ID**.
Client secret key	Click **Certificates & secrets**. Click the **Copy to clipboard** icon under **Client secrets** group.
Authorization URL	Click **Overview > Endpoints**. Click the **Copy to clipboard** icon of **OAuth 2.0 authorization endpoint (v2)**

Okta-SAML Metadata URL

To form metadata url:

1. Log in to Okta.

2. Navigate to **Applications > Applications**.

3. Select the application from the list.

4. Click the **Sign On** tab.

5. Scroll-down and click **View SAML setup instructions** under **SAML setup**.

6. Copy the domain name and app id from **Identity Provider Single Sign-On URL**.

7. Replace ${yourOktaDomain} and ${yourAppID} in URL *https://${yourOktaDomain}/app/${yourAppID}/sso/saml/metadata* with the information copied in previous step.

8. Paste the formed metadata URL in MySonicWall application to setup external identity provider.
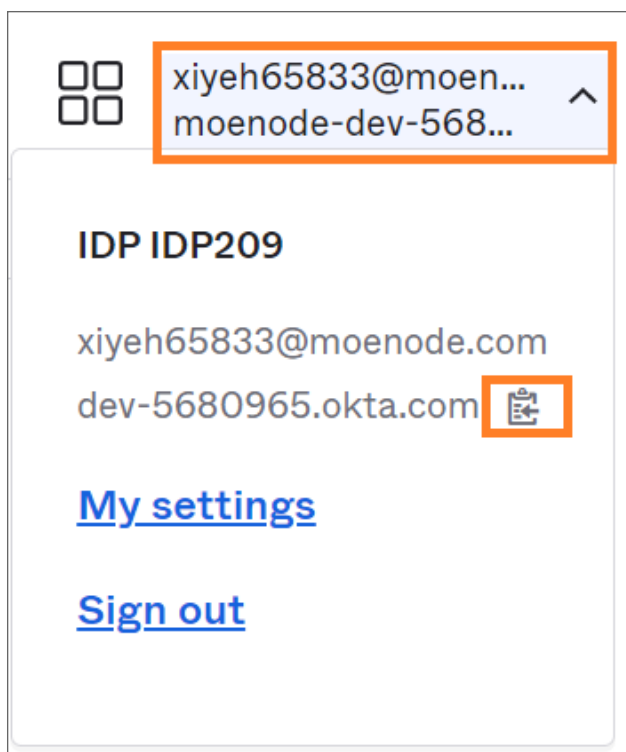
Okta-SAML Manual Configuration Information

To get information from Okta-SAML application:

1. Log in to Okta.

2. Navigate to **Applications > Applications** in the left navigation.

3. Select the application from the list.

4. Click **Sign On** tab.

5. Scroll-down and click **View SAML setup instructions** under **SAML setup**.

6. Copy the **Identity Provider Single Sign-On URL** and **X.509 Certificate** respectively.

7. Enter the copied information in MySonicWall application to setup external identity provider.

Okta-OpenID Metadata URL

To form metadata url:

1. Log in to Okta.

2. Click the account information.

3. Click the **Copy to clipboard** icon next to the issuer domain name as shown below.

4. Copy the Issuer domain name as shown below.

5. Replace ${yourOktaDomain} in URL *https://${yourOktaDomain}/.well-known/openid-configuration* with the issuer domain name copied in previous step.

    For more information, refer to https://developer.okta.com/docs/reference/api/oidc/#well-known-openid-configuration.

Okta-OpenID Manual Configuration Information

To get Client ID and Client secret from Okta-OpenID application:

1. Log in to Okta.

2. Navigate to **Applications > Applications** in the left navigation menu.

3. Select the application from the list.

4. Scroll-down to **Client credentials** group under **General** tab.

5. Click the **Copy to clipboard** icon next to **Client ID** and **Client secret** respectively and enter the information inMySonicWall application.

To form an Authorization URL from Okta-OpenID application:

1. Copy the domain name from Okta account information. For more information, refer to Okta-OpenID Metadata URL.

2. Replace ${yourOktaDomain} in URL *https://${yourOktaDomain}/oauth2/default/v1/authorize* with the information copied in previous step.

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

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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:

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