



# Organization Account

## Feature Guide

SONICWALL®

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# Introduction

In an existing MSW account structure, all the products are registered to an employee because there is no Organization Account. An employee manages the products and related activities. There is no way to identify the overall inventory of organization products and tenants, and have a centralized access control for all the organizational resources. The tied assets become orphaned when an employee is removed from the Organization Account.

To overcome the limitations of the existing MSW structure, the Organization Account is introduced with a new role called Super Admin. With the Organization Account and Super Admin role, the Super Admin can see 100% of the Organization Account inventory and have full control over the organizational resources.

## Topics:

- [Account Settings](#)
- [Benefits of Organization Account](#)
- [Creating an Organization Account](#)
- [Migrating to a New Organization Account](#)
- [Transferring Products](#)
- [Adding Employees to the Organization's Account](#)
- [Adding Customers or Resellers to the Organization's Account](#)
- [Removing Employees or Customers from the Organization's Account](#)
- [Troubleshooting](#)
- [SonicWall Support](#)

# Account Settings

In the new Organization Account structure, settings are categorized into:

- [Organizational Settings](#)
- [Personal Account Settings](#)

## Organizational Settings

Common settings that must be applied and maintained throughout the organization are grouped under **My Organization** settings.

All the employees of the Organization Account can see the **My Organization** settings, but only **Super Admins** of the Organization Account can control these organization settings.

<b>Organization Information</b>	<p><b>Organization ID:</b> A unique ID of the account was generated during sign-up. Super Admin can edit the Organization name and address.</p> <p><b>Company Name and Address:</b> Super Admin can modify the Company Name and Address.</p>
<b>Organization Domain</b>	The Super Admin can update the domain. For more information, refer to <a href="#">Updating Domain of the Organization Account</a> .
<b>Additional Options</b>	<p>Enforcing 2-factor authentication and the use of external identity providers to get connected to the resources are grouped under this category. The individual user must configure the <a href="#">Personal Account Settings</a> based on the organization settings.</p> <p>Also, the Super Admin can define Preferred Data Center, Renewal Days, and Alternate Email.</p>
<b>Renewal Contact</b>	Super Admin can add or remove the renewal contact.

## Personal Account Settings

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

- Update Email and Password
- Delete account
- Edit the personal address of the logged-in user
- Configure **Additional Options** enforced in the [Organizational Settings](#)
- Set the Time Zone
- Define Alert Settings

# Benefits of Organization Account

In the new Organization Account hierarchy, an Organization Account owns all the registered products and tenants, and created user groups. Instead of tying products, tenants, and user groups to an employee, all the resources are tied to an Organization Account so that Super Admins can have full visibility and control over the resources.

When an employee registers a product, or create a tenant or a user group, all these get linked to the associated Organization Account. An employee does not own anything but gets access to the resources based on the access levels granted by the Super Admin of the Organization Account.

Even if an employee leaves the organization, there is no impact on the resources.

With an Organization Account, Super Admins can:

- Have full visibility of overall organizational resources.
- Control and manage access to the resources effectively.
- Merge and consolidate multiple independent employee accounts into one Organization Account.
- Transfer the products between Organization Accounts and Tenants.
- Invite and manage the **Customers** with the **Affiliations** process.

# Creating an 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 to other employees up to 4.

# Migrating to a New Organization Account

Existing MSW accounts can be migrated to the new Organization Account structure by [Assigning a Super Admin Role](#).

The existing account **Admin** can assign the Super Admins.

**NOTE:**

- Single-user Organization Account can have a minimum of one Super Admin.
- Multi-user Organization Account can have a minimum of two and a maximum of four Super Admins.
- Single-user MSW accounts get migrated to a new Organization Account structure automatically.

**Topics:**

[Assigning a Super Admin Role](#)

## 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.
- The Admin of the old structure accounts. Once the Admin assigns the Super Admin role, the existing account gets migrated to a new Organization Account.

**To assign a Super Admin role:**

1. Login to [MySonicWall](#).
2. Navigate to **My Workspace | User Groups > User List**.
3. Click **Assign Super Admin** or **Update Super Admin**.

**NOTE:**

- For newly signed-up accounts, the signed-up (first) user is added as a Super Admin by the default.
  - For the old structure (existing) accounts, Admin can add the Super Admin from the users' list.
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.

ⓘ **NOTE:** Once the Super Admin role is assigned, the old account gets migrated to a new Organization Account structure. The Super Admins have full control over the organization's account resources.

# 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

### *To transfer products between tenants:*

1. Login to [MySonicWall](#).
2. Navigate to **My Workspace | Products**.
3. Do one of the following:
  - Click the **More Actions** icon under the **Actions** column and select **Transfer Products**.
  - Select the product in the Products table and click **Transfer Products** on top of the table.
4. Enter or select the tenant from the list of tenants.
5. Click **Transfer**.

## Transferring Products between Organization Accounts

- ① **IMPORTANT:** Before initiating the transfer, make sure that the product to be transferred is tied to the Organization Account, not to any employee.

**To transfer the products between Organization Accounts:**

1. Login to [MySonicWall](#).
2. Navigate to **My Workspace | Products**.
3. Do one of the following:
  - Click the **More Actions** icon under the **Actions** column and select **Transfer Products**.
  - Select the product in the Products table and click **Transfer Products** on top of the table.
4. Select **Another Organization** in the **Transfer Products** pop-up window.
5. Enter any one of the destination Organization Account details.
  - Organization ID
  - Email ID
  - User Name
6. 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.
7. Click **Transfer**.

# Adding Employees to the Organization's Account

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

## ***To add employees to the Organization Account:***

1. Login to [MySonicWall](#).
2. Navigate to **My Workspace | User Groups > Users List**.
3. Click the **New User (+)** icon.
4. Fill in the details.
  - a. Select the **Contact Type** as **Employee**.
  - b. Select the **User Group** to which you want to add the new user.
  - c. Enter **User Email ID**.  
Make sure that the domain of the entered Email ID is the same as the Organization Account domain defined in **My Account** settings.
  - d. Enter **User First Name** and **Last Name**.
5. Click **Submit**.

## **Topics:**

[Updating Domain of the Organization Account](#)

# Updating Domain of the Organization Account

You can invite employees belonging to the domain of the Organization Account.

## ① | **NOTE:**

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

Existing employees with the old domain continue to work as-is. You cannot add employees belonging to the other organization's domain. All employees of the Organization Account get an email if any changes are made to the domain.

***To update the domain of the organization's account:***

1. Login to [MySonicWall](#).
2. Navigate to **Your account > My Profile**.
3. Click the **Edit** icon of the **Organization Domain**.
4. Enter the new domain to be added.
5. Click **OK**.

# Adding Customers or Resellers to the Organization's Account

A new process, **Affiliations**, is introduced in the new Organization Account structure to build organization-level links between customers and MSPs. You can find the list of customers and resellers invited or added to the Organization Account under **My Workspace | User Groups > Affiliations** tab. The Super Admin of the respective account can review the pending Affiliations and approve or reject the request.

## NOTE:

- An MSP initiates the Affiliations to add the customers to the Organization Account to share the MSP-owned products with the customer.
- A customer initiates the Affiliations to get added to the Organization Account to share their (customer-owned) products with an MSP to co-manage.

Adding customers or resellers is a 2-way process. Suppose an MSP initiates the process of sharing the products with a customer, the Super Admin of the customer Organization Account should review and approve the request to get added to the MSP Organization Account. Similarly, if a customer initiates the process of sharing the products with an MSP Organization Account, the Super Admin of the MSP Organization Account should review and approve the request.

## Topics:

- [Initiating an Affiliation](#)
- [Approving an Affiliation](#)
- [Rejecting an Affiliation](#)
- [Revoking an Affiliation](#)

## Initiating an Affiliation

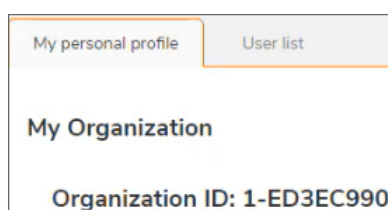
The Super Admin of the MSP Organization Account initiates the Affiliations process to add customers to the MSP Organization Account to share the MSP-owned products with the Customers. Once an MSP initiates the Affiliations process, the request goes to the customer. Super Admin of the Customer Organization Account reviews and approves or rejects the request.

Customers get added to the Organization Account after the Affiliations request is approved. Access to the organization resources is controlled by User Groups. Mostly, added customers get Read-only access to the resources.

### To initiate an Affiliation:

1. Login to [MySonicWall](#).
2. Navigate to **My Workspace | User Groups > Affiliations** tab.
3. Click the **New Affiliation (+)** icon.
4. Fill in the New Affiliations details:

**Customer ID** Enter the Organization Account of the Customer. You can find the Organization Account ID under your profile.



<b>Customer Name</b>	Automatically detects the customer's name based on the entered Customer ID.
<b>Select Tenant</b>	Select the Tenants from which you want to share the products. You can select multiple tenants.
<b>User Group</b>	Select the User Group to which you want to add the employees.
<b>Access</b>	Define the <b>Access</b> level to be granted for the selected <b>User Group</b> . You can change the Access level of the user group later under <b>My Workspace   User Groups</b> .

5. Click **Add**.
  - Now the affiliation request is initiated and is added to the Affiliations table with **Pending** status.
  - Customer gets an email to approve the request. The Super Admin of the Customer can log in to the Organization Account and Approve the request according to [Approving an Affiliation](#).

① **NOTE:** On approval of the pending request by the customer:

- Affiliation **Status** gets changed to **Established**.
- **Scope** shows the Affiliation name and products shared with **Shared** sign.

## Approving an Affiliation

### To approve an Affiliation:

1. Login to [MySonicWall](#) of the customer.
2. Navigate to **My Workspace | User Groups > Affiliations** tab.

- You can find the list of **Approved** and **Pending** Affiliations requests.
  - Under the **Actions** column, you can find:
    - Only the **Delete** icon for approved requests.
    - **Approve** and **Delete** icons for pending requests.
3. Review the details of the pending request and click **Approve**.
  4. Select the **Employees** from the list to be added to the user group.
    - Multiple employees can be included.
    - You can find this user group under **My Workspace | User Groups**. Access to the tenants or products is granted to the users based on the access provided to the User Group.
  5. Click **Approve**.

Now, the affiliation is approved. The users added to the User Group can access the products shared by an MSP.

On approval of the pending request:

- Affiliation **Status** gets changed to **Established**.
- User Group is created under **My Workspace | User Groups** with a **Shared Sign**.
- **Scope** shows the Affiliation name and products shared with the customer.

## Rejecting an Affiliation

### *To reject an Affiliation:*

1. Login to **MySonicWall** of the customer.
2. Navigate to **My Workspace | User Groups > Affiliations** tab.
  - You can find the list of **Approved** and **Pending** Affiliations requests.
  - Under the **Actions** column, you can find:
    - Only the **Delete** icon for approved requests.
    - **Approve** and **Delete** icons for pending requests.
3. Review the details of the pending affiliation request and click the **Delete** icon.
4. Click **OK** in the confirmation window.

Pending affiliation is rejected and disappears from the Affiliations tab.

## Revoking an Affiliation

Super Admins of both Organization Accounts can revoke the established Affiliations.



### **To revoke an Affiliation:**

1. Login to **MySonicWall** of the customer.
2. Navigate to **My Workspace | User Groups > Affiliations** tab.
  - You can find the list of **Approved** and **Pending** Affiliations requests.
  - Under the **Actions** column, you can find:
    - Only the **Delete** icon for established requests.
    - **Approve** and **Delete** icons for pending requests.
3. Click the **Delete** icon of the established affiliation.  
Now the selected Affiliation is revoked along with the affiliated user groups.
4. Click **Revoke** in the **Revoke Affiliation** window.  
After revoking the affiliation, the organization loses control or access to the resources.

# Removing Employees or Customers from the Organization's Account

① | **NOTE:** Only Super Admin of the Organization Account can remove employees and customers from the Organization Account.

## *To remove employees or customers:*

1. Login to [MySonicWall](#).
  2. Navigate to **My Workspace | User Groups > Users List**.
  3. Under the **Action** column, click the **Delete** icon of the User to be removed from the Organization Account.
  4. Click **Yes** in the confirmation window.
- ① | **NOTE:** The user is permanently removed from the Organization Account.

# Troubleshooting

<b>Problem</b>	<b>Solution</b>
Unable to see the Organization ID in my account	Your account is not linked to the Organization Account. Raise a help desk ticket to merge your account with the Organization Account.
Unable to access the resources despite having access	If a user is part of multiple user groups with different access levels, the least access among all the access levels is granted.

# 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 [MySonicWall](#)
- Learn about [SonicWall Professional Services](#)
- Review [SonicWall Support services and warranty information](#)
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# About This Document

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