

# MSP Multi-tenancy with DNSFilter

Navigating you and your clients onboarding experience

**Welcome to DNSFilter's MSP Roadmap and Checklists!** We're excited to support you in setting up and optimizing your multi-tenant environment. Our tailored checklists are designed to help you efficiently onboard your clients, streamline their network security, and maximize the benefits of DNSFilter. Whether you're just getting started or enhancing your current setup, these resources will provide you with clear, step-by-step guidance for a successful implementation.

As you begin, we've provided individual checklists for each MSP-specific feature, ensuring you can confidently navigate:

1

## Global Policies

- Set universal filtering rules that apply across all of your client organizations to ensure consistent security and management while still allowing customization as needed
- [Create and manage Global settings](#)

2

## Whitelabeling

- Tailor your dashboard and resources with your logo and company name to provide a seamless, branded interface for your clients
- [Customize my environment](#)

3

## Client Deployment and Setup

- Navigate our deployment methods to establish unique deployments for each of your clients, associating Policies and Block Pages accordingly
- [Explore Deployment options](#)

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Explore DNSFilter's [Knowledge Base](#), [Partner Portal](#), and [Community](#) for resources, tools, and expert advice to maximize your experience and engage with users in diverse environments!

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## Preparing your Global Policy setup

We provide a baseline recommendation for Global Policies to ensure consistent security across all of your sub-organizations. These serve as a foundational layer of protection while allowing for further customization as needed within each of your client environments.

### Optimize your environment prior to client deployment for a smooth setup

There are a few initial setup options to consider before configuring your Global settings:

- Only MSP account users with Admin permissions or higher can create Global Policies and Block Pages
- You will manage [Universal Lists](#) from this menu, creating Allow and Block Lists that automatically span across all sub-orgs and cannot be overridden by sub-org specific Filtering Policies
- Global Filtering Policies **are not the same as** Universal Lists: they must be applied to an organization attribute—Site, Roaming Client, User, etc.—to take effect
- Global Block Pages must be created in the MSP dashboard to be applied to sub-orgs

1

#### ☐ Customize your first Global Filtering Policy

- Establish universal filtering rules that block harmful categories like malware, phishing, and adult content for all of your clients
- [Learn how to setup your Global Policies](#)

2

#### ☐ Customize your first Global Block Page

- This is the page your users see when they attempt to visit a domain that is not allowed according to your Policies
- [Learn how to setup a Global Block Page](#)

3

#### ☐ Configure your Universal Allow/Block Lists

- Add domains that should always be allowed or blocked across all client organizations to simplify and streamline management
- [Learn how to adjust your Universal Lists](#)

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## ☐ Pro tips to easily navigate your MSP setup

- To convert a sub-org Filtering Policy into a Global Policy, navigate to the Policy, toggle Enable this Policy as Global Policy, and it will appear in the MSP parent org's Global Filtering Policy tab
- Global resources have a globe icon to help differentiate between them and sub-org Policies

## Congratulations!

You've successfully created your first Global settings under your MSP. Next, explore the Whitelabeling features available to provide your clients with a tool and environment unique to your organization!

*You can review the integrations and resources available below to continue familiarizing yourself with DNSFilter:*

### Helpful insights

- [Validate and test](#) your DNS Filtering Policies and custom Block Pages within your own environment before deploying to clients
- Follow these instructions for [mass deployment](#) on Windows and macOS devices
- Easily [generate and manage API keys](#) directly within the DNSFilter dashboard, enabling seamless integration with your tools and workflows

### Optional integrations

- [Zapier](#): Connects you to over 3,000 popular applications to transfer data, trigger alerts, record activities, and integrate DNSFilter into normal business processes
- [SIEM/Data Export](#), incl. [Microsoft Sentinel](#): Export options that allow you to combine query log data with other data for monitoring, action, and alerting
- With [REWST](#), MSPs can integrate DNSFilter into their existing processes, enabling seamless ticketing, reporting, and policy management for a more scalable and efficient service delivery
- Our [PSA integrations](#) ensure accurate usage tracking, automated invoicing, and streamlined client management, saving time and reducing administrative overhead for MSPs
  - *Only available for self-serve customers at this time*

### Additional troubleshooting tips

- Websites aren't loading correctly:
  - The [website is on the Allow List](#), but it's category is blocked
  - A site that [should be allowed](#) under my policy is blocked
- Visit our all-encompassing [troubleshooting article](#) for support with issues you're experiencing

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# MSP Multi-tenancy with DNSFilter

Establishing a Whitelabeled experience for your clients

We've prepared this Whitelabeling setup checklist to help you seamlessly configure your branding and maximize the benefits of DNSFilter. Start by reviewing each section of the checklist and completing the steps in sequence for a smooth setup process. You can access both this checklist and detailed instructions in our Knowledge Base at anytime!

## To get started, prepare your environment for a Whitelabeled configuration

Follow these preparation steps to ensure a smooth and successful setup:

- Create a CNAME record with [your domain registrar](#) that points your desired custom domain (e.g., filter.yourcompany.com) to cname.netaalerts.io
- Prepare two company logos to upload under **Dashboard Customization** in the Whitelabel settings
  - A company logo (500x200 pixels with a transparent background)
  - A favicon (32x32 pixels) to represent your brand in browser address bars and bookmarks
- Decide whether to send emails from DNSFilter domains or set up custom email templates using your own domain

1



### Activate Whitelabeling in your Dashboard

- Navigate to Whitelabel under the MSP dropdown menu and select **Enable Whitelabel**

2



### Customize your Dashboard Name

- This is the name associated with the Dashboard when clients login via your Custom Domain

3



### Add your Custom Domain Mapping (CNAME)

- Enter your pre-created CNAME and save to see the required mapping domain **cname.netaalerts.io**
- After adding an FQDN here, DNSFilter will verify and activate within 1-2 business days
- [Learn how to add a CNAME to your domain registrar](#)

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## 4

### Custom Logo and Favicon

## ☐ Dashboard Customization

- Tailor the appearance and functionality of the DNSFilter dashboard to align with your business identity, ensuring consistency across all touchpoints

- These images will replace the DNSFilter logo in the Dashboard and browser bookmarks when accessed through your custom CNAME
- [Learn how to add your company logo](#)

### Customer Contact Email

- Any support escalation requests submitted by your customers through the dashboard will be sent to the email you provide here

### Site Creation Toggle

- Enabling this will allow clients with Admin privileges in their own environments to create Sites
  - If disabled, only an MSP-level Admin can create Sites

## 5

## ☐ Email Configuration options

- Select your preferred email sending domain—either the default @netalerts.io, @dnsfilter.com, or your custom domain—to align with your branding strategy
  - For custom domain setup, follow the article linked below to submit a request to our support team for access to the ElasticEmail environment
- [Learn how to send emails from a custom domain](#)

## Congratulations!

You have successfully configured your Whitelabeling settings with DNSFilter! Next, take a moment to explore other customizable options for your client-facing environment as well as identifying the next steps for successful client deployments.

### Helpful insights

- [Build email templates](#) customized with your MSP's branding, or create your own templates
  - Review the [existing templates available](#) for custom branding
- Access our [Partner Portal](#) for technical training, sales coaching, and enablement opportunities to MSP and resellers to enhance their DNSFilter experience
  - When SSO is activated, Partner Portal access is limited to Admin Users that were added before setup
- Easily [generate and manage API keys](#) directly within the DNSFilter dashboard, enabling seamless integration with your tools and workflows

### Optional integrations

- With [REWST](#), MSPs can integrate DNSFilter into their existing processes, enabling seamless ticketing, reporting, and policy management for a more scalable and efficient service delivery
- Our [PSA integrations](#) ensure accurate usage tracking, automated invoicing, and streamlined client management, saving time and reducing administrative overhead for MSPs

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# MSP Multi-tenancy with DNSFilter

Deployment options for you and your clients

We've prepared a client deployment and sub-organization setup checklist to help you efficiently configure and manage DNS filtering across your MSP account. Follow these detailed steps to ensure a smooth setup process and maximize the benefits for your clients. You can access the checklist and additional setup resources in our Knowledge Base at any time!

## To get started, we recommend preparing each environment for deployment

Steps one and two below are specific to MSPs, leveraging Global settings to streamline client deployments:

- As an MSP, you can choose to assign Global Filtering Policies or Block Pages to your client environments, or you can create unique Policies or Block Pages tailored to each client's needs.
- To import a sub-organization list into the dashboard, ensure your data follows this format in a CSV and submit a ticket to our support team:
  - orgName,networkName,ipAddresses,physicalAddress,externalId

⚠ Any administrative users specific to a single client environment must be added under the respective sub-organization's Users section, **not** the MSP's Users section.

1

### ☐ Select your preferred Filtering Policy

- If you plan to use your Global Filtering Policy, you can move on to step two
  - If a unique Filtering Policy or Schedule is required for your client, you can create a new Policy or duplicate an existing one under the Policies section in the client's organization
- [Learn how to setup a unique Filtering Policy](#)

2

### ☐ Select your preferred Block Page

- Choose to apply the Global Block Page for consistent branding across all clients, or create a unique Block Page within the client's organization for a tailored experience.
- [Learn how to setup a unique Block Page](#)

3

### ☐ Begin your Deployment

- For deployment instructions, start at the red asterisks \* highlighted for each deployment option in our New Customer Roadmap checklist for a seamless deployment
- [Navigate to the New Customer Roadmap checklist](#)

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## ☐ Assign your Policies and Block Pages

- Customize filtering by assigning specific Policies and Block Pages per user, device, collection, or deployment type
  - Navigate to your specific deployment type and review the options available under the Policy/Schedule and Block Page columns

## Congratulations!

You're now equipped to effectively implement Global Filtering Policies and Block Pages, or customize unique settings for each client as needed, ensuring a seamless and tailored experience.

*You can review the integrations and resources available below to continue familiarizing yourself with DNSFilter:*

### Helpful insights

- Deploy via [Virtual Machine \(VM\) or Docker container](#) when available to easily keep the Relay up to date
- Deploy DNSFilter Roaming Clients seamlessly across client devices using [Silent Install or an RMM tool](#), ensuring efficient and consistent installations
  - ⚠ **Note for macOS Sequoia Users:** Due to changes in macOS 15 (Sequoia), the Roaming Client may not auto-update as expected. Users who have already updated to Sequoia must manually update to agent version 1.8.6
- Effectively [manage Roaming Clients](#) across all sub-organizations, including editing, deleting, and exporting agent metadata
- Access our [Partner Portal](#) for technical training, sales coaching, and enablement opportunities to MSP and resellers to enhance their DNSFilter experience
  - When SSO is activated, Partner Portal access is limited to Admin Users that were added before setup
- Stay up-to-date on new releases by reviewing our [Roadmap](#) and [Changelog](#) any time

### Optional integrations

- [Zapier](#): Connects you to over 3,000 popular applications to transfer data, trigger alerts, record activities, and integrate DNSFilter into normal business processes
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### Additional troubleshooting tips

- [Apple devices](#) or the [Safari browser](#) are having difficulties loading websites
- Your deployment [isn't auto-updating](#) as expected or it's [returning a bad output](#)
- Visit our all-encompassing [troubleshooting article](#) for support with issues you're experiencing

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