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Sophos Central
Partner Dashboard Help

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1 About the Sophos Central Partner Dashboard

The **Sophos Central Partner Dashboard** allows partners to:

- Manage customer licenses for products related to Sophos Central.
- Manage customer security - access customers' Sophos Central Admin consoles and act on alerts.
- Manage customers' XG Firewalls through their Sophos Central Firewall Managers.
- Access the Sophos Partner Portal and all three consoles—Sophos Central Partner, Sophos Central Admin, and Sophos Central Firewall Manager—with a single sign-on.

Tip: If you need help with the single sign-on, multi-factor authentication and getting started with the Sophos Central Partner interface, please watch this video.

You can access the **Sophos Central Partner** console in either of these ways:

- Via the Sophos Partner Portal (https://partnerportal.sophos.com/), by clicking **Manage Sophos Central** at the top of the page.
- From Sophos Central, by following this link: https://cloud.sophos.com/manage/partners.

2 Dashboard

The Dashboard provides access to the most important information about your customers at a quick glance. It consists of the **Sophos Central** and **Sophos Central - Firewalls** areas. For each of the areas, it shows license information that requires, or will soon require an action (for example, the number of expired or nearing expiration licenses, over the limit license usage, the number of trials). You can also see the total number of your Sophos Central and Sophos Central Firewall customers.

When you click on a category on the Dashboard, you are taken to a more detailed view of the licensing information in that category. For example, clicking on “Near Expiration” will take you to the **Sophos Central Licenses** page with the “Near Expiration” filter applied. There, you can see the date when the license expires, name of the customer, name, ID and type of the license, as well as usage limit and actual usage.

3 Sophos Central

3.1 Sophos Central Customers

The **Sophos Central Customers** page contains the list of your Sophos Central customers and provides an at-a-glance view of the status of their licenses in each of the available categories — Endpoint, Mobile, Web, Server.

On this page, you can perform the following actions:

- **Search for Customers**

  To search for a customer, enter the customer's name or the beginning of the customer's name — a trailing wildcard is assumed. To display all the records again, clear the search field.

- **Create Monthly Account**

  You can create managed customer accounts, see Monthly Usage Account (page 7).

- **Apply Activation Key**

  Click **Apply Activation Key** to enter an activation key for a customer. The term of the license will begin once the activation key is entered.

  Important: This step is irreversible. Make sure that you are applying the correct activation key to the correct customer. For assistance, please contact Customer Support.

  Alternatively, if at the time of ordering you specified the customer's email address for sending the license to, the customer can enter the activation key in their Sophos Central console.

  Note: An activation key consists of 30 characters split into 6 groups of 5 characters separated by hyphens. An activation key contains uppercase letters A-Z and digits 0-9, for example: 7FW3Y-7T8CX-FWTXF-9V3CV-4BHQ8-PXFFV.

- **Launch Customer Dashboard**

  If Partner Assistance is enabled in the customer's Sophos Central console, you can open their console.

  Partner Assistance can be enabled by the customer's Sophos Central administrator. You cannot see, enable or disable this option in the customer's Sophos Central console. Partner Assistance is enabled automatically when you create a trial for a customer. If a customer created a trial themselves, Partner Assistance is not enabled automatically and the customer has to enable it in their console, if needed.

  Note: The customer can enable Partner Assistance in their Sophos Central console under **Account Details** > **Sophos Support** > **Enable Partner Assistance**.

  For more information about the Sophos Central console, see https://www.sophos.com/en-us/support/documentation/sophos-cloud.aspx.

- **View License Details**

Click **License Details** to open the customer's license details page and view detailed information about all Sophos Central licenses that the customer holds. On the license details page, you can also look up the customer's contact information. In the case of trial, expiring or expired licenses, the **Convert to Paying** button will be displayed. Clicking **Convert to Paying** takes you to the Sophos Partner Portal where you can create an order for the customer.

- **Look Up Customer Contact Info**

  Clicking on a customer's name opens the customer's contact info pop-up.

3.2 Sophos Central Licenses

The **Sophos Central Licenses** page contains the list of Sophos Central licenses that your customers have. It displays the total number of licenses as well as the number of licenses that are near expiration, expired, exceeded their usage limit, and the number of trial licenses. By clicking on one of these areas, you can view the details of the licenses and, depending on the category, take the following actions:

- **Search for Customers**

  To search for a customer, enter the customer's name or the beginning of the customer's name—a trailing wildcard is assumed. To display all the records again, clear the search field.

- **Select a Time Period**

  You can select a time period for which you want to view licenses. You can choose to view the licenses for:

  - Last 30 Days (default)
  - Last 60 Days
  - Last 90 Days
  - Last Year

- **Convert to Paying**

  If you select a trial license or an expired or expiring license, the **Convert to Paying** button will be displayed at the top of the page. Clicking **Convert to Paying** takes you to the Sophos Partner Portal where you can create an order for the customer. You cannot create Monthly Usage accounts from new trial licenses, see Monthly Usage Account (page 7).

  Once you have purchased a Sophos Central license, an activation key will be issued and sent to the email address you specified at the time of ordering. If the activation key has been sent to you, enter the activation key in the Sophos Central Partner Dashboard. If the activation key has been sent to your customer, they will have to enter it in their Sophos Central console.

  The term of the license will begin once the activation key is entered.

- **Export to CSV**

  In the "All Licenses" view, you can export the license list to a comma separated value (CSV) file, which you can then view, for example, in Excel.

- **Look Up Customer Contact Info**

Clicking on a customer's name opens the customer's contact info pop-up.

3.3 Start a New Trial

Clicking the **Start a New Trial** button on this page takes you to the Sophos Partner Portal and opens the "Create a new trial account" online form.

In the online form, fill in the details of the customer you are creating the trial for - type in their company name, address, email, and so on. When done, click **Create Trial Account**.

The new trial will appear in the Sophos Central Partner Dashboard. No email notifications about new trials are sent.

Note: You cannot create Monthly Usage accounts from trial accounts, see Monthly Usage Account (page 7).

3.4 Monthly Usage Account

You must be a Managed Service Provider (MSP) Flex partner to create a monthly usage account.

Note: You cannot convert new trial accounts to monthly usage accounts.

You can create a monthly customer account from the **Sophos Central Customers** page or from the **Managed Customer Usage** page. To create a monthly customer:

1. Click **Create Monthly Account**.
2. Enter the details for the customer.
3. You can now start deploying the products.

3.5 Alerts

On the **Alerts** page, you can view the alerts for your Sophos Central customers that have Partner Assistance enabled. You can take the following actions:

- **Search for Alerts**

  To search for alerts raised in a customer's Sophos Central console, enter the customer's name or the beginning of the customer's name—a trailing wildcard is assumed. To display all the records again, clear the search field.

- **Filter Alerts**

  You can filter the list of alerts based on their priority. You can choose to:

  - Show All Alerts (default)
  - Show High Alerts Only
  - Show Medium Alerts Only
  - Show Info Alerts Only

- **Launch Customer Dashboard**

If Partner Assistance is enabled in the customer's Sophos Central console, you can open their console and take action on alerts.

Partner Assistance can be enabled by the customer's Sophos Central administrator. You cannot see, enable or disable this option in the customer's Sophos Central console. Partner Assistance is enabled automatically when you create a trial for a customer. If a customer created a trial themselves, Partner Assistance is not enabled automatically and the customer has to enable it in their console, if needed.

Note: The customer can enable Partner Assistance in their Sophos Central console under **Account Details** > **Sophos Support** > **Enable Partner Assistance**.

For more information about the Sophos Central console, see https://www.sophos.com/en-us/support/documentation/sophos-cloud.aspx.

- **Export to CSV**

  You can export the list of alerts to a comma separated value (CSV) file, which you can then view, for example, in Excel.

4 Sophos Central - Firewalls

If your customers use Sophos Central Firewall Manager to manage their XG Firewalls, you can request their approval for you to be able to manage their Firewalls and help them with some management tasks or alert resolution.

For more information about Sophos Central Firewall Manager, see https://www.sophos.com/en-us/support/documentation/sophos-cloud-firewall-manager.aspx.

Before you can manage your customers' Firewalls, you need to go through the authorization process. Once you have requested authorization and received approval, you can start selling and managing Firewalls.

4.1 Firewall Customers

On this page, you can view a summary of your Sophos Central Firewall customers and see how many firewalls they have, how many of those are managed, and the earliest license expiration date (the expiration date of the Firewall subscription that expires the soonest).

When you select a customer and click the **View All Firewalls** button, you can view the details of the firewalls that the customer owns: the serial number, model number, whether the firewall is under warranty or not, and when is the earliest subscription expiration.

4.2 Firewall Approvals

On this page, you can view and manage Firewall authorization for Sophos Central Firewall Manager.

Before you can manage your customers' Firewalls, you need to go through the authorization process. When you first open the **Firewall Approvals** page, the primary administrator for your account needs to apply for approval (by clicking **Apply**) and accept the terms and conditions. Once the application is sent, your channel account team at Sophos reviews and approves it. Then you can start sending requests to customers asking to allow you to manage their Sophos Central Firewalls.

You can view the numbers and details for the following categories:

- **Requests Not Sent**

  To send a firewall management request, select a firewall entry and click **Request to Manage**. This sends an email to the customer. The customer can then approve your request from their "My Sophos" customer portal by following the link in the email.

  If you don't want to manage a firewall, select it and click **Ignore Firewall**.

- **Approval Pending**

  Here you can see all your requests that haven't been approved by customers, and the date when you sent each request. To resend a request, select the corresponding entry and click **Resend Request**.

- **Rejected By Customer**
- **Rescinded / Ignored**
- **Approved Firewalls**

  If you want to stop managing an approved firewall, for example, in case of account changes, select it and click **Rescind Management**.

- **All Firewalls**

4.3 Manage Firewalls

On this page, you can launch Sophos Central Firewall Manager, by clicking **Manage**.

Sophos Central Firewall Manager allows you to manage multiple customer Firewalls from a single console.

For more information about Sophos Central Firewall Manager, see https://www.sophos.com/en-us/support/documentation/sophos-cloud-firewall-manager.aspx.

You can create managed customer accounts, see Monthly Usage Account (page 7). You can then assign firewalls to these new customer accounts.

5 Manage Administrators

On the **Manage Administrators** page, you can view and manage the Sophos Central and Sophos Central Firewall administrators. You can also see the details of the primary administrator. A primary administrator grants permissions to manage Sophos Central Firewalls.

By default, non-primary administrators have the right to manage Sophos Central but not Sophos Central Firewalls.

6 Manage Login Settings

To manage your multi-factor authentication login settings, click on your account name at the top right of the Sophos Central Partner Dashboard, and then click **Manage Login Settings**.

For more information about multi-factor authentication in Sophos Central, see knowledgebase article 122893.

On the **Manage Login Settings** page, you can:

- Change your default challenge type.
- Change the PIN used in conjunction with the secondary email validation method.

Challenge Settings

You can choose between:

- **SMS Text Message.** Enter a cell phone number to receive security codes via text message.
- **Google Authenticator.** Use the Google Authenticator app on your mobile device to generate security codes.

PIN Settings

You can change the PIN used in conjunction with the secondary email validation method. You will need this PIN when you need to verify your login with your email. Enter a new 6-digit PIN and click **Submit**.

7 Account Details

The **Account Details** page lets you set up co-branding, i.e. add your branding to the Sophos Self Service Portal.

Click your account name (upper right of the user interface), select **Account Details**, and click the **Co-branding** tab.

Co-branding

You can have your logo displayed to your customers' end users in the Sophos Self Service Portal.

Important: By default all your customers get the logo you choose here. If you want some customers to get a different logo, or no logo, go to their individual Sophos Central Admin accounts and set custom co-branding there.

Add a logo

Click **Browse** (on the right of the page), select a file to upload and click **Save**. Logo images must meet the requirements shown on the page.

Change or remove the logo

To add a new logo, or to go back to the Sophos logo, you must remove any current logo. Click **Remove** under the logo preview and click **Save**.

8 Support

If you need help with the Sophos Central Partner Dashboard, please open a Support case by sending an email to customercare@sophos.com.

You can also find technical support for Sophos Central by:

- Visiting the Sophos Community at community.sophos.com/ and searching for other users who are experiencing the same problem.
- Visiting the Sophos support knowledgebase at www.sophos.com/en-us/support.aspx.

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