Sophos Partner Portal Functional Specifications

Last Updated: October 2024

Note: This document serves to define the detailed functionality for the Sophos Partner Portal (marketing CMS) deployment.

1. General Functionality

All content on the Sophos Partner Portal is accessible via (Sophos ID) authentication only by default unless otherwise configured.

The marketing pages are available in six languages: English, German, French, Italian, Spanish, Japanese.

For those countries where a local language is not supported, English is their default language.

There is only one English version of the portal and it is shared (i.e. there is no separate English US and UK language version). However, region-specific content is controlled by segmentation.

If a page is not translated, English is the fallback language.

2. Logging in

When a partner logs in to the Sophos Partner Portal successfully at https://partners.sophos.com, they are taken to the marketing front page automatically.

Users are directed to a specific language based on their partner account information. For example, a Spanish partner will automatically get directed to the Spanish language site.

Partners are able to update their language preferences via the partner portal settings if they are not happy with the default language they have been allocated. This is because some country/regions use multiple languages and users may also be living in a country that is not their first language.

3. Content Segmentation

Content segmentation can be applied to all partner portal items, including the following items:

- Pages as a whole
- Parts (or "Blocks") of pages
- Assets in the Asset Library
- Navigation menu items
- Footer links
- Tutorial Video Lightbox Section

Segmentation works to control who can or cannot see these items. For example, a Page can be visible to the UKI region only. Alternatively, it could be visible to all regions except UKI. There can also be combinations of segments, such as a PDF being visible to Gold Partners in Switzerland only.

Ideally, content segmentation should be applied using AND, OR, EXCLUDE operators. AND should be the default operator when applying more than one segmentation rule, but we should be able to configure the segmentation using OR, EXCLUDE as well.

For example: A page is visible to UKI Partners <u>AND</u> (Gold Partners <u>OR</u> Silver Partners) <u>EXCEPT</u> Partner Accounts Older than 30 Days

The following is the full list of the segmentation options which are relevant to the marketing content.

Segment Name	SFDC Record Type
User Language English	User
User Language French	User
User Language German	User
User Language Spanish	User
User Language Italian	User
User Language Japanese	User
Can View MSP Usage	User
Can View Order	User
Has Full Portal Access	User
Orders	User
Content & Education Only	User
Exclude Content & Education	User
Account Administrator	User
Deal Administrator	User
Partner User is Less than 30 Days Old	User
Portal Admin	User
User Administrator	User
Partner Type CSP	Account
Partner Type MSP	Account
Not a CSP Partner	Account
Not an MSP Partner	Account
Partner Level Platinum	Account
Partner Level Select	Account
Partner Level Gold	Account
Partner Level Silver	Account
Partner Level Authorized	Account
MDF Eligible Yes	Account
MDF Eligible No	Account
Incentive User Yes	Account
Incentive User No	Account
Account is Less Than 30 Days Old	Account
CSP Partner Status	Account
Exclude Authorized Partners	Account
MDF OR Rewards Partner	Account
MSP Marketplace Partners	Account

MSP Flex Partners	Account
MSP Connect Partners	Account
MSP Distributors	Account
Not an MSP Flex Partner	Account
Not an MSP Partner	Account
MSP Pricing Approved	Account
Sophos Endpoint & Server Accreditation	Account
Sophos Firewall Accreditation	Account
Synchronized Security Expert	Account
XG Certified Support Pricing	Account
AMER Region	Account
APAC Region	Account
DACH Region	Account
Japan Region	Account
NEEMEA Region	Account
UK IRE Region	Account
Western Europe Region	Account
Africa Sub-Region	Account
A-NZ Sub-Region	Account
ASEAN Sub-Region	Account
Austria Sub-Region	Account
BeLux Sub-Region	Account
Canada Sub-Region	Account
CIS Sub-Region	Account
Eastern Europe Sub-Region	Account
France Sub-Region	Account
Germany Sub-Region	Account
Greater China Sub-Region	Account
IBERIA Sub-Region	Account
INDIA & SAARC Sub-Region	Account
Ireland Sub-Region	Account
Italy Sub-Region	Account
Japan Sub-Region	Account
LATAM & Caribbean Sub-Region	Account
LATAM & Caribbean Sub-Region Excl. Brazil	Account
Middle East Sub-Region	Account
Netherlands Sub-Region	Account
Nordics Sub-Region	Account
Switzerland Sub-Region	Account
UK Sub-Region	Account
United States Sub-Region	Account
Aaland Islands	Account
Afghanistan	Account
Albania	Account

Algeria	Account
American Samoa	Account
Andorra	Account
Angola	Account
Anguilla	Account
Antarctica	Account
Antigua and Barbuda	Account
Argentina	Account
Armenia	Account
Aruba	Account
Australia	Account
Austria	Account
Azerbaijan	Account
Bahamas	Account
Bahrain	Account
Bangladesh	Account
Barbados	Account
Belarus	Account
Belgium	Account
Belize	Account
Benin	Account
Bermuda	Account
Bhutan	Account
Bolivia	Account
Bosnia and Herzegovina	Account
Botswana	Account
Brazil	Account
British Indian Ocean Territory	Account
British Virgin Islands	Account
Brunei Darussalam	Account
Bulgaria	Account
Burkina Faso	Account
Burundi	Account
Cambodia	Account
Cameroon	Account
Canada	Account
Cape Verde	Account
Caribbean Netherlands	Account
Cayman Islands	Account
Central African Republic	Account
Chad	Account
Chile	Account
China	Account
Christmas Island	Account
Cocos Islands	Account

Colombia	Account
Comoros	Account
Congo	Account
Cook Islands	Account
Costa Rica	Account
Cote d'ivoire	Account
Croatia	Account
Cuba	Account
Curacao	Account
Cyprus	Account
Czech Republic	Account
Democratic Republic of the Congo	Account
Denmark	Account
Djibouti	Account
Dominica	Account
Dominican Republic	Account
Ecuador	Account
Egypt	Account
El Salvador	Account
Equatorial Guinea	Account
Eritrea	Account
Estonia	Account
Ethiopia	Account
Falkland Islands	Account
Faroe Islands	Account
Fiji	Account
Finland	Account
France	Account
French Guiana	Account
French Polynesia	Account
French Southern Territories	Account
Gabon	Account
Gambia	Account
Georgia	Account
Germany	Account
Ghana	Account
Gibraltar	Account
Greece	Account
Greenland	Account
Grenada	Account
Guadeloupe	Account
Guam	Account
Guatemala	Account
Guernsey	Account
Guinea	Account

Guinea Bissau	Account
Guyana	Account
Haiti	Account
Heard Island and McDonald Islands	Account
Honduras	Account
Hong Kong	Account
Hungary	Account
Iceland	Account
India	Account
Indonesia	Account
Iran	Account
Iraq	Account
Ireland	Account
Isle of Man	Account
Israel	Account
Italy	Account
Jamaica	Account
Japan	Account
Jersey	Account
Jordan	Account
Kazakhstan	Account
Kenya	Account
Kiribati	Account
Kuwait	Account
Kyrgyzstan	Account
Laos	Account
Latvia	Account
Lebanon	Account
Lesotho	Account
Liberia	Account
Libya	Account
Liechtenstein	Account
Lithuania	Account
Luxembourg	Account
Macao (Macau)	Account
Macedonia	Account
Madagascar	Account
Malawi	Account
Malaysia	Account
Maldives	Account
Mali	Account
Malta	Account
Marshall Islands	Account
Martinique	Account
Mauritania	Account

Mauritius	Account
Mayotte	Account
Mexico	Account
Micronesia	Account
Moldova	Account
Monaco	Account
Mongolia	Account
Montenegro	Account
Montserrat	Account
Morocco	Account
Mozambique	Account
Myanmar	Account
Namibia	Account
Nauru	Account
Nepal	Account
Netherlands	Account
Netherlands Antilles	Account
New Caledonia	Account
New Zealand	Account
Nicaragua	Account
Niger	Account
Nigeria	Account
Niue	Account
Norfolk Island	Account
North Korea	Account
Northern Mariana Islands	Account
Norway	Account
Oman	Account
Pakistan	Account
Palau	Account
Palestinian Territory	Account
Panama	Account
Papua New Guinea	Account
Paraguay	Account
Peru	Account
Philippines	Account
Pitcairn	Account
Poland	Account
Portugal	Account
Puerto Rico	Account
Qatar	Account
Republic of Kosovo	Account
Reunion	Account
Romania	Account
Russian Federation	Account

Rwanda	Account
Saint Barthelemy	Account
Saint Helena	Account
Saint Kitts and Nevis	Account
Saint Lucia	Account
Saint Martin	Account
Saint Pierre and Miquelon	Account
Saint Vincent and the Grenadines	Account
Samoa	Account
San Marino	Account
Sao Tome and Principe	Account
Saudi Arabia	Account
Senegal	Account
Serbia	Account
Seychelles	Account
Sierra Leone	Account
Singapore	Account
Sint Maarten	Account
Slovakia	Account
Slovenia	Account
Solomon Islands	Account
Somalia	Account
South Africa	Account
South Georgia and the South Sandwich Islands	Account
South Korea	Account
South Sudan	Account
Spain	Account
Sri Lanka	Account
Sudan	Account
Suriname	Account
Svalbard and Jan Mayen Islands	Account
Swaziland	Account
Sweden	Account
Switzerland	Account
Syrian Arab Republic	Account
Tahiti	Account
Taiwan	Account
Tajikistan	Account
Tanzania	Account
Thailand	Account
Timor Leste	Account
Togo	Account
Tokelau	Account
Tonga	Account
Trinidad and Tobago	Account

Tunisia	Account
Turkey	Account
Turkmenistan	Account
Turks and Caicos Islands	Account
Tuvalu	Account
Uganda	Account
Ukraine	Account
United Arab Emirates	Account
United Kingdom	Account
United States Minor Outlying Islands	Account
United States of America	Account
Uruguay	Account
US Virgin Islands	Account
Uzbekistan	Account
Vanuatu	Account
Vatican	Account
Venezuela	Account
Vietnam	Account
Wallis and Futuna Islands	Account
Western Sahara	Account
Yemen	Account
Zambia	Account
Zimbabwe	Account

4. Translation

All content components which make up the marketing content on the Sophos Partner Portal should be eligible to be exported for translation. Likewise the translated files should be eligible for re-import.

Imported translations should remain in draft mode until the admin chooses to publish them.

5. Navigation Menu & Footer
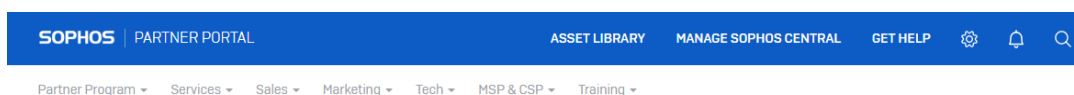
The top navigation menu has two levels. The 1st blue level and the secondary white level. We should have access to both levels and can make changes (i.e. additions, deletions or segment an item). We should be able to define if a navigation item opens in an existing or new window.

There are four icons on the right in the 1st blue level which allow access to:

- User settings
- Tutorial videos (not depicted currently)
- Portal notifications
- Search

The secondary navigation opens up a drop-down menu for each heading, allowing access to the named page.

The footer of the portal shows the copyright on the left and a set of links on the right. As with the top navigation, we should have access to the footer and can make changes (i.e. additions, deletions or segment an item). The German site has an additional legal requirement and always shows an "extra" link called Impressum.

6. Front Page

The Sophos Partner Portal front page would need a redesign as the current Impartner-based version is outdated and hard to manage.

Please see the dedicated document for full specifications.

Asset Feed (BrandFolder)

Currently the assets sit in the Impartner Asset Library. With a proposed move to BrandFolder, obviously the source of the assets will change.

This feed is dynamic and shows the latest 3 BrandFolder updates by language.

No segmentation is required for this block as a whole, this section should be visible to all.

The assets are sometimes segmented however, this segmentation is also valid for the view here.

The „View all assets" button takes the user to the BrandFolder Partner assets by language.

Asset Library Updates (View All Assets)

Sophos Central Device Encryption Datasheet
10 FEB 2020

Sophos Preferred Support Partner Offering Guide
10 FEB 2020

SophSkills: Understanding the Basics of Zero-Trust and Network Switches (Video)
10 FEB 2020

Clicking on an asset will take the user to the asset view directly.

Segmentation Row 2 (Admins)

Access the Compliance Dashboard [Access Now]

Certification Compliance
Certification Transcript >
Certification Lifecycle >

Portal Administration
User Management >
Tips for Portal Administrators >

This segment is visible for admin users only. All blocks can be easily updated by Sophos. The „Compliance" and „Admin" blocks should be overlayed HTML text with a background image. The „Access Compliance" block is also overlayed HTML text with a coloured background. The background images should be easily changeable and language specific.

Social Media Section

FOLLOW US [in] [X]

Social media icons and portal footer are visible to all partners. The social media icons can vary by language.

7.   Asset Library/BrandFolder

The current Asset Library is a central repository for all assets which are linked on the Partner Portal. This includes PDFs, video files, PPTX, WORD, JPG/EPS etc. These assets can be segmented, viewed online and downloaded.

Ideally the Asset Library should be replaced by BrandFolder.

8.   Content Pages

When creating page content in the CMS, we need the ability to create different types of layouts and configurations for content.

Here is a basic overview of the required types:

Partner Only Accessible Layouts	Publicly Accessible Templates
- Front Page Layout - Full width content layout - Two column content layout (with slim right rail) - Landing page (full width with no secondary navigation)	- Microsite - Full width content layout (no navigation unless logged in)

For partner-only layouts, these can only be accessed after authenticating into the Partner Portal.

For publicly accessible layouts, these pages can be accessed without logging in to the Partner Portal. These will show without the Partner Portal navigation menu. However if a partner is authenticated into the Partner Portal, these pages will show with the Partner Portal Navigation menu.

As stated elsewhere in this document, pages as a whole or parts of pages can be segmented using the Partner Portal segmentation rules. Furthermore, on page dynamic content can be added within the content. See the applicable chapters for more information.

Here are examples of the pages.

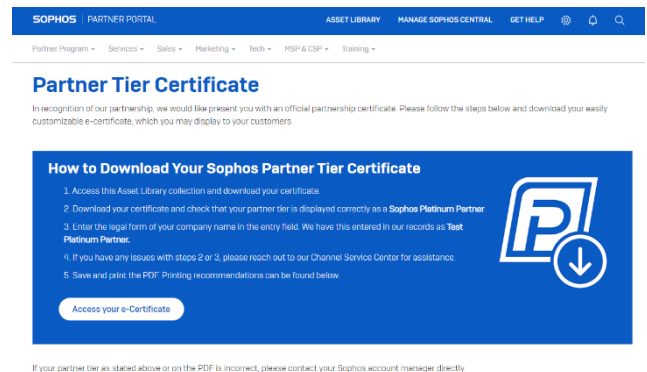Partner Layout: Two column content layout (with slim right rail)
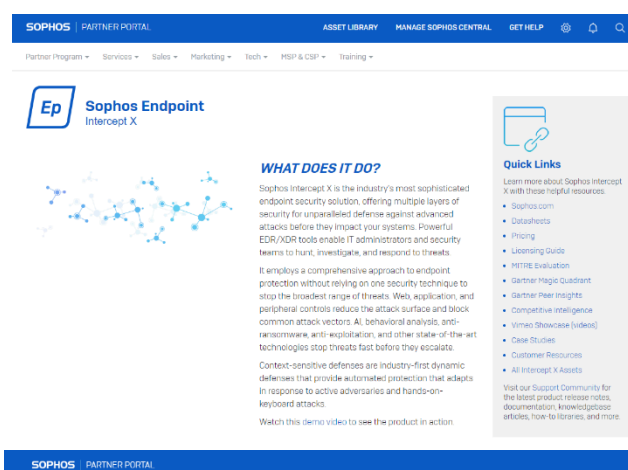
Public Layout: Full width content layout (no navigation unless logged in).

The Partner Layout for the landing page with no secondary navigation looks the same, only the first level navigation in the blue area should be visible in this case.

Partner Layout: Full width content layout

9. Deep Links

When a partner is logged in to the partner portal and clicks on a partner portal URL, they are taken to the requested page or asset - if they have the correct access rights to see this content.

When a partner is not logged in to the partner portal and clicks on a partner portal URL, they are taken to the login page where they will need to authenticate first. Once they have authenticated, they will then be automatically redirected to the requested page or asset - if they have the correct access rights to see this content.

10. On page Dynamic Content for CMS Pages

When adding content to the Sophos Partner Portal via the CMS, we are able to add unique dynamic content to page copy. This information is pulled dynamically out of the Partner's SFDC account.

Here is an example:

In the CMS, we will add the applicable token which is synched with a specific field in SFDC. In the case below, we have added the "referral ID number" for the partners at the end of a URL which they can use to capture leads.

Each partner will then see their own unique referral ID on the page, as below.

The following is a list of all the dynamic field tokens which we are using today on the partner portal:

Token	Example
Partner Level/Tier	Gold Partner
Partner Type	Reseller
Partner Name	Acme Ltd. UK
User First Name	Max
User Last Name	Headroom
Referral ID Number	00130000011LhXG
Access Type	Full Access
Partner Account Manager	Mr. Sophos Sales
Listed on Sophos Partner Locator	Yes
Partner Specialization	CSP
Synchronized Security Accreditation	Yes
Endpoint and Server Accreditation	No
Sophos Firewall Accreditation	No
Sophos Contact Email	salesuk@sophos.com
EDI Account Number	00188525
Last Transaction Date	November 30, 2023

11. Notification Center

The "Notification Center" is essentially an email inbox which is located on the Sophos Partner Portal. If there is a new notification, the icon in the navigation menu will sign a number, and the partner can click on the icon to see the notification center drop-down and the latest messages.
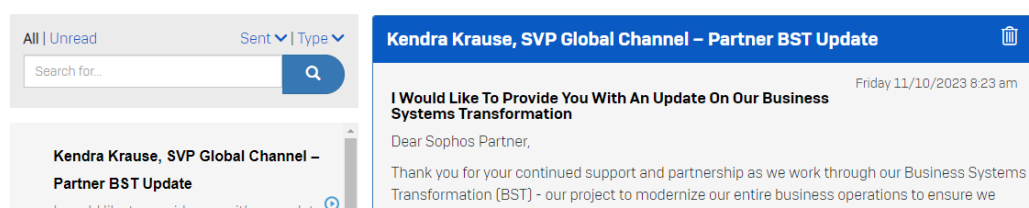
Clicking on a message will take the partner to the Notification Center with all of their messages.

These messages are sent via the CMS and targeted at partners on any level that the CMS segmentation provides.
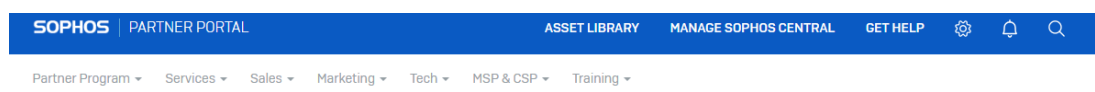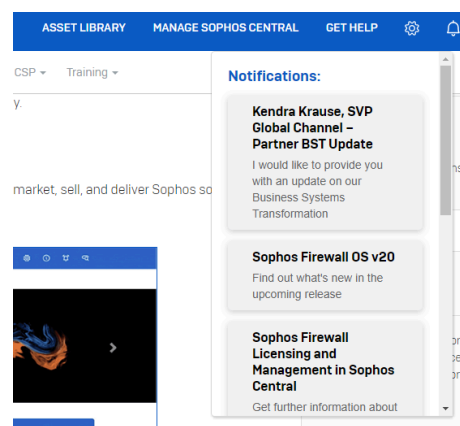
12. Tutorial Video Lightbox Section

There is a drop down in the navigation menu which allows easy access to the Partner Portal tutorial videos.

The drop down opens a lightbox with a list of embedded videos which can each be played within the lightbox.

13. Search

The search function is available in the top navigation menu. If a partner clicks on this they are taken to the search tool.

Searching keywords will serve up results from the CMS based content pages as well as the asset library, with a filter to show only pages or assets.

Important for the search function is for the results to only serve up content which the partner has access to. For example, if a Price List is segmented to the UKI only, a Partner in Germany searching "Price List" should not see the UKI segmented asset.

14. Partner Locator

The Sophos Partner Locator is a public tool which users can interact with in order to find a local reseller or distributor.

Please see the dedicated document for full specifications.

15. Program Compliance Module

The Sophos Partner Compliance Module is a Partner Portal based tool which provides a snapshot of the partner's current year-to-date partner program attainment status.

Please see the dedicated document for full specifications.