How to Add New Admins

Follow the step-by-step instructions in this guide to add new administrators in the Sophos Partner Portal and the Sophos Central Partner Dashboard.
**Getting Started**

There are two ways to create new users or administrators. You can either start in Central Partner Dashboard or in the Partner Portal:

1. **Creating a New Admin in Central Partner Dashboard**

   New Administrators will have access to Central Partner Dashboard to manage customers based on their role.

   ***New Administrators will not have access to the Partner Portal by default. They will be created in the Partner Portal as an Inactive User.***

2. **Creating a New User in Partner Portal**

   Users have access to sales and marketing resources, as well as training.

   ***New Users can be assigned the Central Partner Access permission, which will grant Read Only access by default.***

**Creating Admins in Central Partner Dashboard**

Start by going to [https://id.sophos.com](https://id.sophos.com) and log in with your partner email address. Then click on Central Partner Dashboard.
Next, click on Settings and Policies and then Administrators

Then, click on “Create Admin”

Complete the form by adding the user’s first name, last name and email address, and select a Role. Then click “save”.

Add partner admin
If Partner Portal Access is also required, wait about 10 to 15 minutes for the sync from Central to the Partner Portal. Then, in the Partner Portal, click on the gear at the top right and select Manage Users. Check the box for Show Inactive Users. Find the new user and adjust their permissions for the Partner Portal.

**Manage Users**

Use the Add New User button below to provide access to a user. They will receive instructions assisting them in gaining access to the portal.

- Back to Profile
- Add New User
- Manage Current Users
- Manage Pending Users

**Current Users**

<table>
<thead>
<tr>
<th>User Name</th>
<th>Email</th>
<th>Active</th>
<th>Role</th>
<th>Portal Access Type</th>
<th>Partner Portal Administrator</th>
<th>Central Partner Administrator</th>
<th>MDF Requestor</th>
<th>Central Partner Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fourth Party Contact</td>
<td><a href="mailto:example@example.com">example@example.com</a></td>
<td>✔️</td>
<td>Manager</td>
<td>Full Access</td>
<td>✔️</td>
<td>✔️</td>
<td>X</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Creating Users in Partner Portal

Start by going to https://id.sophos.com and log in with your partner email address. Then click on Sophos Partner Portal.

On the partner portal, click on the gear icon at the top right and then click on Manage Users.
From the manage users page we recommend to first search for the person you’re adding by entering their email address. After you verified that they don’t exist, click on Add New User.

Fill in the New User Information.
Fill in the User Address.

And finally, the User Access and Roles:

**Role**
- User – Contact can only see opportunities that they are assigned to
- Manager – Contact has complete visibility of all opportunities

**Portal Access Type**
- Full Access – Contact has full access to all areas of the portal
- Content & Education – Contact has restricted access, and are unable to view opportunity manager, deal registration, or any customer information

**Portal Administrator**
- Yes – Contact is a Partner Portal Admin
- No – Contact is not a Partner Portal Admin
Central Partner Administrator
This is a read-only field in the Partner Portal. There can only be one Central Partner Administrator.

- Yes – User is the Primary Portal Admin and will have Central Partner Super Admin Role by default.
- No – User is not the Primary Portal Admin

MSP Usage File Access
- Yes – Contact has access to MSP Usage Files
- No – Contact does not have access to MSP Usage Files

Central Partner Access
- Yes – Contact has access to Sophos Central Partner Dashboard
- No – Contact does not have access to Sophos Central Partner Dashboard

***The default role assigned is Read Only with no customers. This must be changed in Central Partner Dashboard by a Super Admin.

At this point a welcome email will be sent to the user. It will contain a link valid for 24 hours. They need to click on that link to create a password for the Partner Portal.

Once they log into the Partner Portal, they will need to click on Manage Sophos Central. They will be guided to create a PIN that they need to remember for recovery purposes for Multi Factor Authentication.

You will be given the option of SMS or Google Authenticator for your MFA. The easiest and fastest is Google Authenticator.
Changing the Default Role in Central Partner Dashboard

New Users given access to Central Partner Dashboard will be automatically assigned Read Only. Wait about 10 to 15 Minutes and then login to the Central Partner Dashboard to change their role.

***You will be unable to make changes to the Central Administrator if they’re currently logged in.

Go to https://id.sophos.com again and this time click on Central Partner Dashboard.

Next, click on Settings and Policies and then Administrators
Put the email address or name of the person you’re looking for into the search box. Then click on the user’s name.

You will notice that the user is Partner Read-only with Zero Customer Accounts. Click Edit below the user icon on the left.

Before we get to the edit screen, we need to discuss admin roles. Below is a list of all available, predefined roles. Partner Super Admins are the only ones allowed to control role-based administration, global policies and have access to all customers.

All other roles can have All Customers selected or individual Customers selected. Can Manage Firewalls is only used for Virtual Firewall as a Service. It adds that email address to the Registrant List for MySophos.
Based on the roles above, we’re going to make this user a partner admin.

Select "All customers [includes all existing and future customers]" to automatically add new customers in the future or select individual customers from the list.

Your New Administrator is now set up.