



USER GUIDE

# Netcentrix Customer Portal

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# Welcome to your Customer Portal

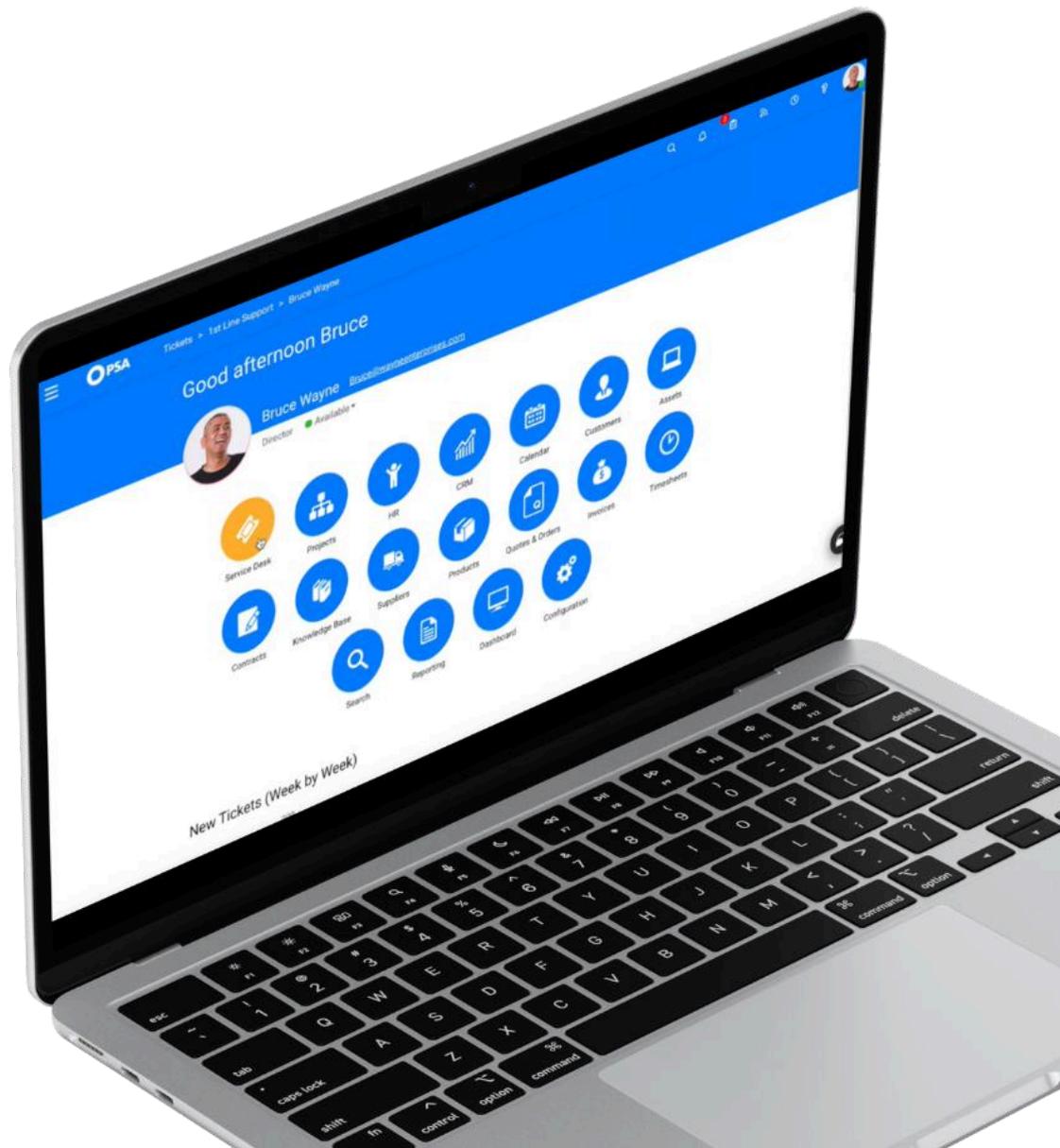
We're excited to introduce your Netcentrix Customer Portal, delivered via HaloPSA, your one-stop platform for managing and accessing all of our services in a seamless and efficient way.

Whether you're submitting service requests, tracking progress, or managing your account, the portal is designed to simplify your experience and improve communication with our team.

In this short visual guide, we will walk you through the steps to access your account and navigate key features, such as raising tickets, so you can use the portal with ease.

As new features are released, this guide will be updated to keep you informed.

Let's get started!



# Logging In

When you visit our Customer Portal, you'll be taken to the login page. Here, you have two options:

1. Sign in with Microsoft 365: If you already use Microsoft 365, simply choose this option to log in quickly.
2. Not an Microsoft 365 user? No problem! Just give us a call on 0333 035 4111, and we'll help set you up with a login using your email address.

[Log in here](#)

★ Important! – When you sign up for Microsoft Business with Netcentrix, you do not require any new login credentials to access the portal.



Please log in to your account

Remember me

[Forgotten Password?](#)

[Log in to the Agent Application](#)

or



Dawson House, Eaton Av  
Chorley, PR7 7NA



03330354111

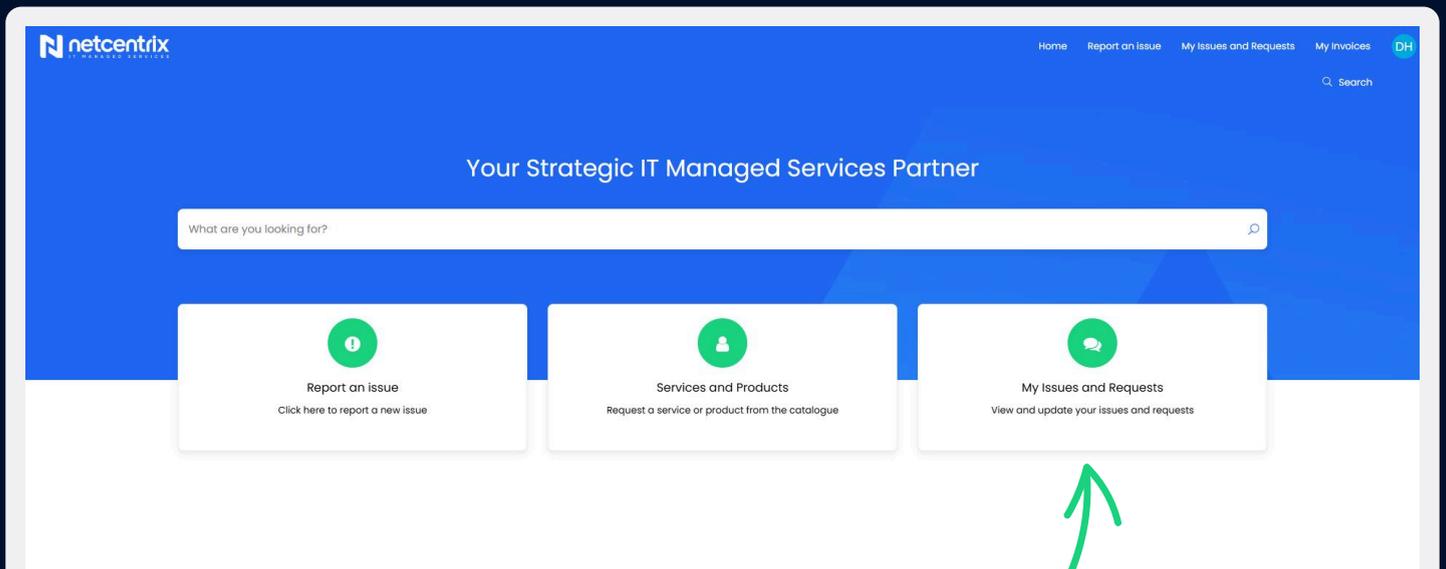


customerservices@netcentrix.com

# Portal Homepage

After you log in, you'll be taken to the main homepage dashboard.

1. **Global Search:** At the top, you'll see a search bar that allows you to search across the entire portal—making it easy to find anything, whether it's a service, ticket, or information you need.
2. Below the search bar, you'll have three main options to choose from:
  - **Report an Issue:** Click here to quickly report any issues you're facing.
  - **Services and Products:** Gain access to the services and products available to you.
  - **My Issues and Requests:** Check on the status of your current issues and requests here.

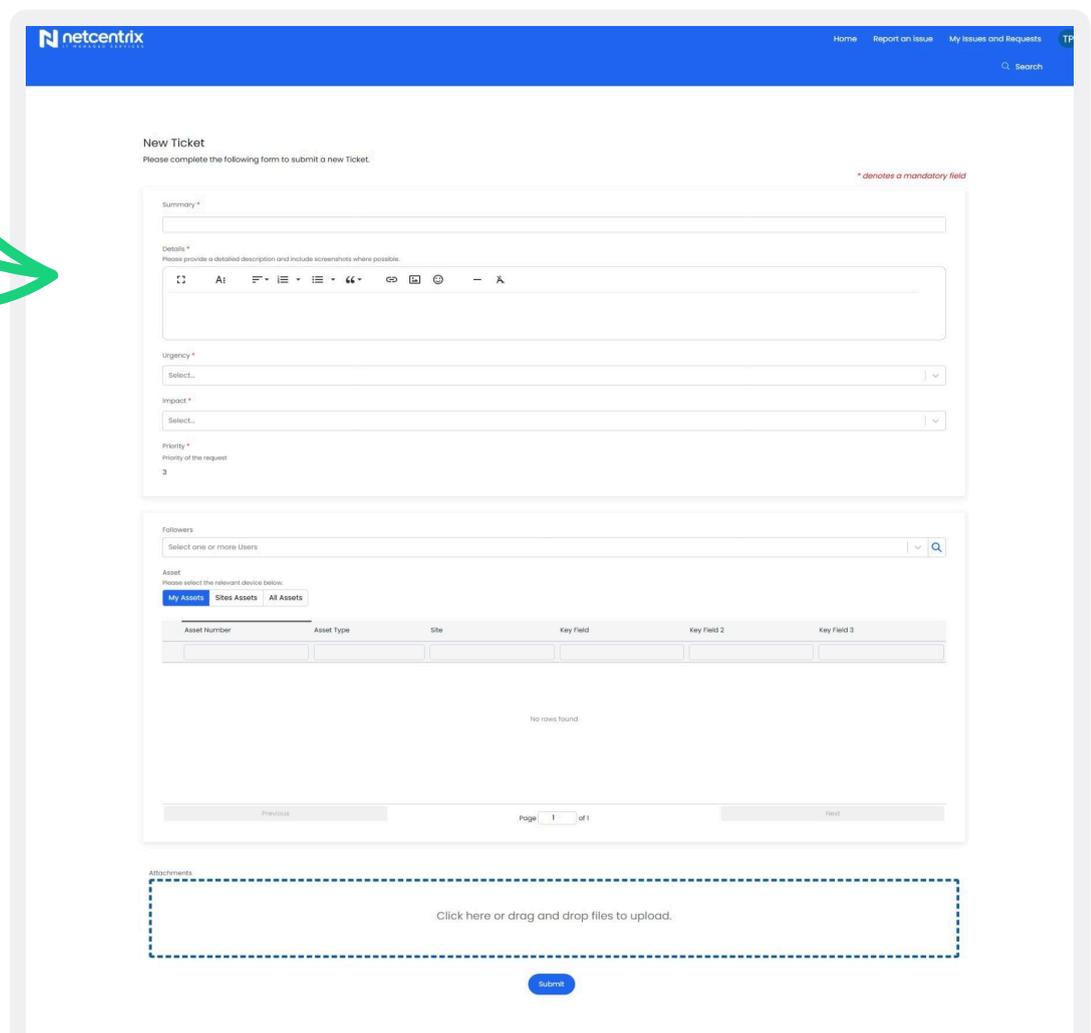


★ **Important!** – To view all live and past ticket requests, click on the 'My Tickets and Requests' option. Here you can check progress and add additional notes.

# Report an Issue

If you need to report an issue, simply click on "Report an Issue" and you'll be presented with a ticket form like the one to the right. Here's how to fill it out:

- 1. Summary and Description:** Provide a brief summary of the issue, followed by a detailed description. This helps us understand the problem better.
- 2. Impact to Your Business:** You'll have the option to highlight how this issue is affecting your business. This helps us prioritise your request based on its impact.
- 3. Add Users:** You can add other people from your business to the ticket. They'll receive updates and notifications as the issue progresses.
- 4. Select Asset:** If you know which device the issue is related to, you can select it from the asset list. This helps us route the issue to the right team faster.
- 5. Attach Supporting Information:** If you have any files, such as screenshots or documents that help explain the issue, you can easily drag and drop them into the file upload section at the bottom of the page.



The screenshot shows the 'New Ticket' form in the Netcentrix Customer Portal. The form is titled 'New Ticket' and includes a sub-header 'Please complete the following form to submit a new Ticket.' and a note '\* denotes a mandatory field'. The form fields are:

- Summary \***: A text input field.
- Details \***: A rich text editor with a toolbar and a text area.
- Urgency \***: A dropdown menu.
- Impact \***: A dropdown menu.
- Priority \***: A dropdown menu.
- Followers**: A dropdown menu to 'Select one or more Users'.
- Asset**: A section with tabs for 'My Assets', 'Sites Assets', and 'All Assets'. Below the tabs is a table with columns: Asset Number, Asset Type, Site, Key Field, Key Field 2, and Key Field 3. The table is currently empty, showing 'No rows found'.
- Attachments**: A dashed box containing the text 'Click here or drag and drop files to upload.'

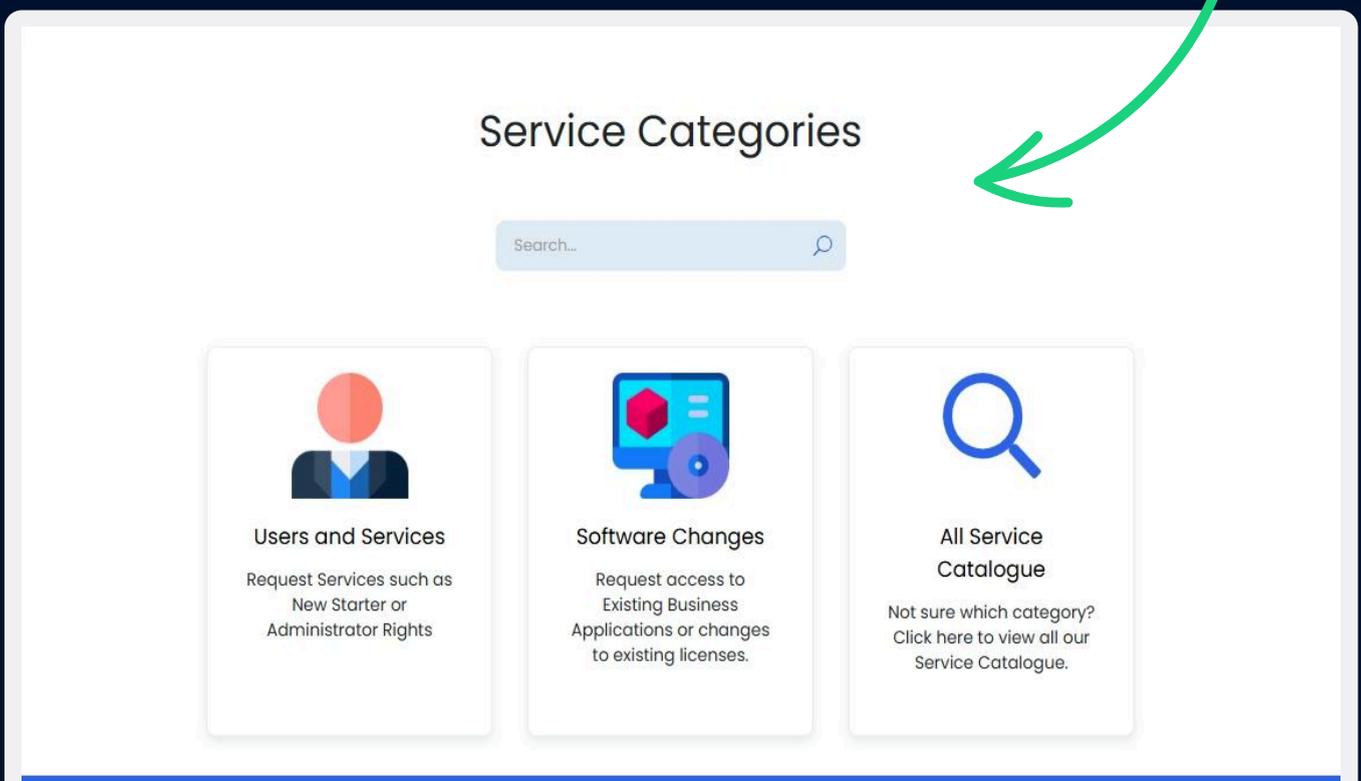
A blue 'Submit' button is located at the bottom of the form.

# Exploring Services & Products

If you select Services and Products, you'll be presented with the screen shown below. Here's what you can access:

- 1. All Service Catalogue:** If you're not sure where your request belongs, this option will show you all available categories so you can choose the right one.
- 2. Software Changes:** Select this if your request is related to software updates or changes.
- 3. Users and Services:** This option lets you manage user access or request changes to your services.

★ Important! – If your User Profile is "Primary Service Contact," you're automatically approved to process all requests. Otherwise, approval is required before processing.



# Users & Services

When you select Users and Services, the following options will be displayed:

1. **Add/Remove Printer:** Add or remove printers from user profiles.
2. **Create New Shared Mailbox:** Set up a centralised mailbox for team communications.
3. **General Request:** Submit broad user-related requests not covered by other categories.
4. **Leaver:** Manage account access and permissions for departing employees.
5. **Modify Distribution List:** Update distribution list members to ensure efficient communication.
6. **Modify Shared Mailbox:** Edit settings or permissions for an existing shared mailbox.
7. **Modify SharePoint Permissions:** Adjust access to ensure only authorised users can manage content.
8. **Modify Teams Talk Call Routing:** Configure or adjust call routing in Microsoft Teams.
9. **New Starter:** Set up accounts and services for new employees.
10. **Set/Update Out of Office:** Configure out-of-office replies and notifications.
11. **Shared Drive Access:** Manage user access to shared drives and folders.
12. **Update Email Signature:** Edit and manage your email signature for outgoing emails.

## Users and Services

Choose a different category

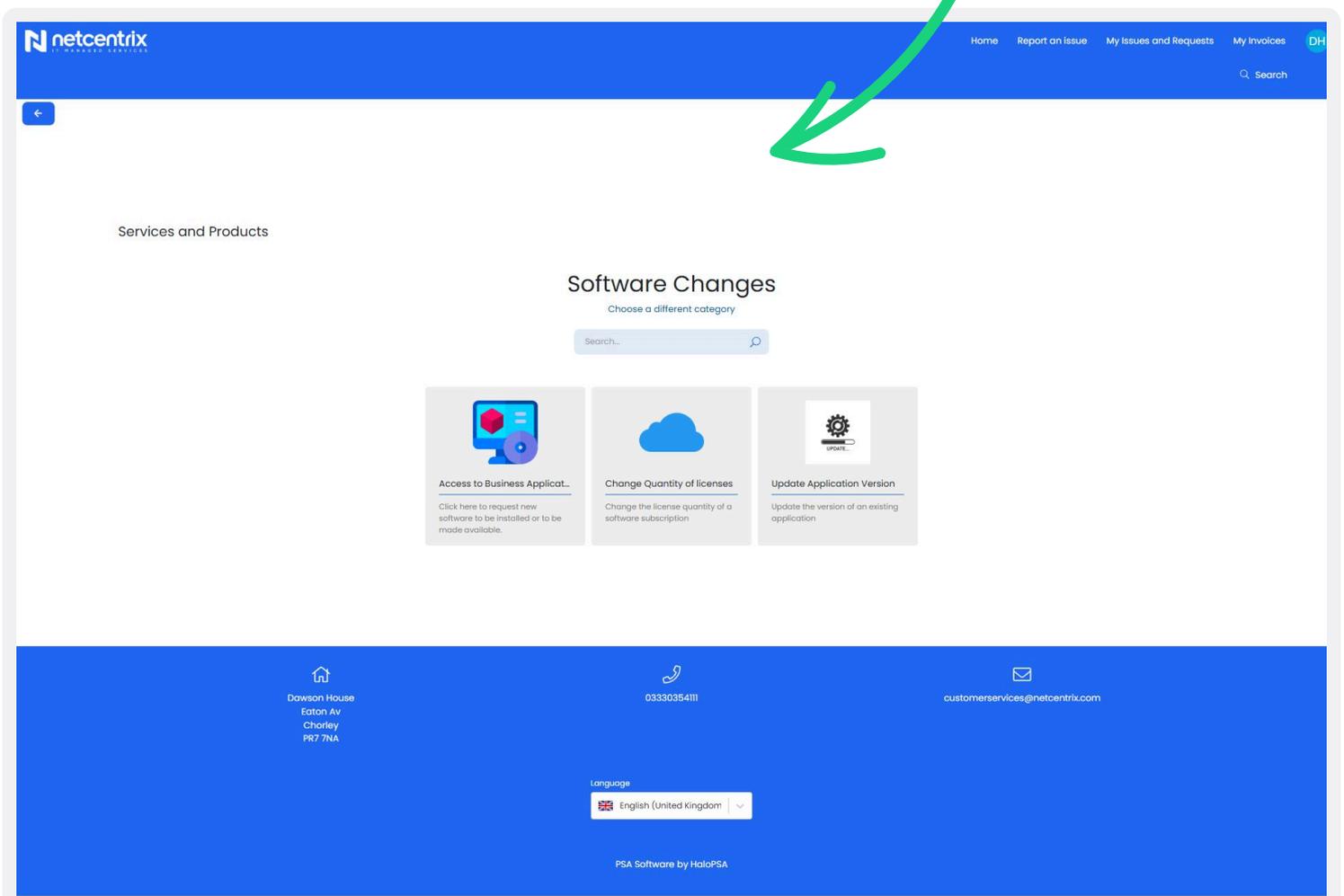
Search\_

 <b>Add/Remove Printer</b> Click here to add/remove a printer	 <b>Create New Shared Mailbox...</b> Click here to create a new shared mailbox or distribution group	 <b>General Request</b> Click here to log a general request	 <b>Leaver</b> Click here to inform IT about an employee leaving.	 <b>Modify Distribution List</b> Click here to make changes to an existing distribution group.	 <b>Modify Shared Mailbox</b> Click here to modify a shared mailbox
 <b>Modify SharePoint Permissio...</b> Click here to change SharePoint permissions	 <b>Modify Teams Talk Call Rout...</b> Click here to modify your Microsoft Teams call routing	 <b>New Starter</b> Click here to request a new employee account.	 <b>Set/Update Out of Office</b> Click here to set or update an Out of Office message	 <b>Shared Drive Access</b> Click here to request access to a shared drive.	 <b>Update Email Signature</b>

# Selecting Software Changes

When you select Software Changes, the following options will appear for you to choose from, depending on the type of change you wish to make:

- 1. Access to Business Applications :** This option allows you to manage and modify access to various business applications within your organisation.
- 2. Change Quantity of Licences:** If you need to adjust the number of software licenses for a particular application.
- 3. Update Application Version:** Use this option when you need to update the version of a particular software application in your environment.

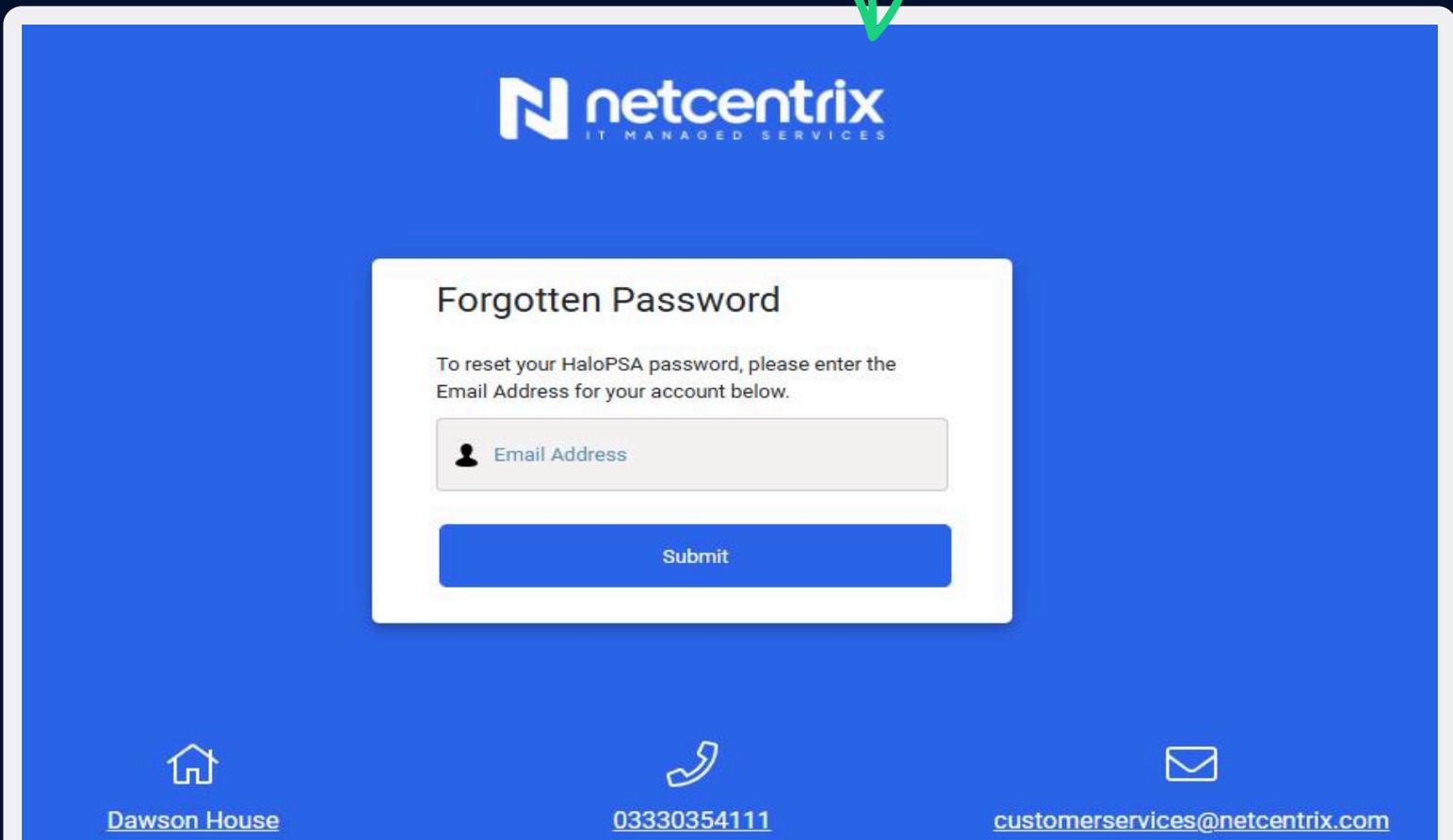


The screenshot displays the Netcentrix Customer Portal interface. At the top, there is a blue navigation bar with the Netcentrix logo on the left and links for Home, Report an Issue, My Issues and Requests, My Invoices, and a search bar on the right. Below the navigation bar, the main content area is titled 'Services and Products' and features a 'Software Changes' section. This section includes a search bar and three interactive cards: 'Access to Business Applications' (with a monitor icon), 'Change Quantity of licenses' (with a cloud icon), and 'Update Application Version' (with a gear icon). A large green arrow points from the top right towards the 'Software Changes' title. The footer contains contact information for Dawson House, Eaton AV, Chorley, PR7 7NA, the phone number 03330354111, and the email address customerservices@netcentrix.com. It also includes a language dropdown menu set to 'English (United Kingdom)' and the text 'PSA Software by HaloPSA'.

# Customer Portal Password Reset

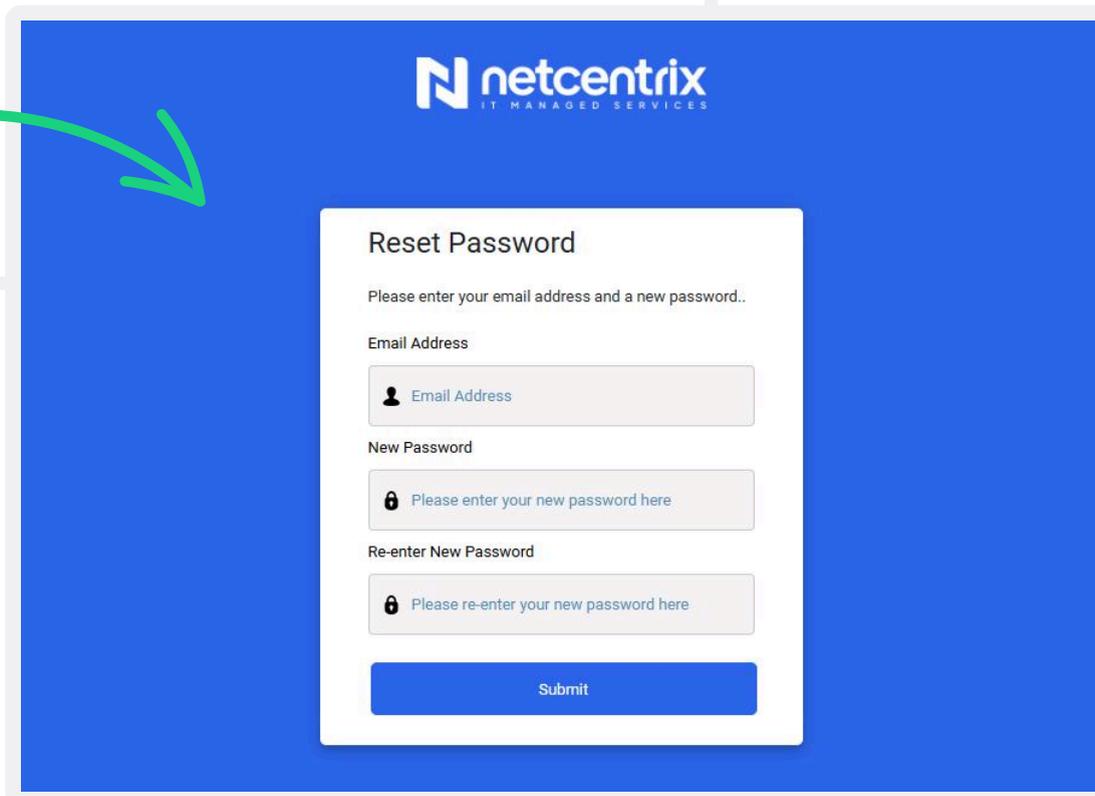
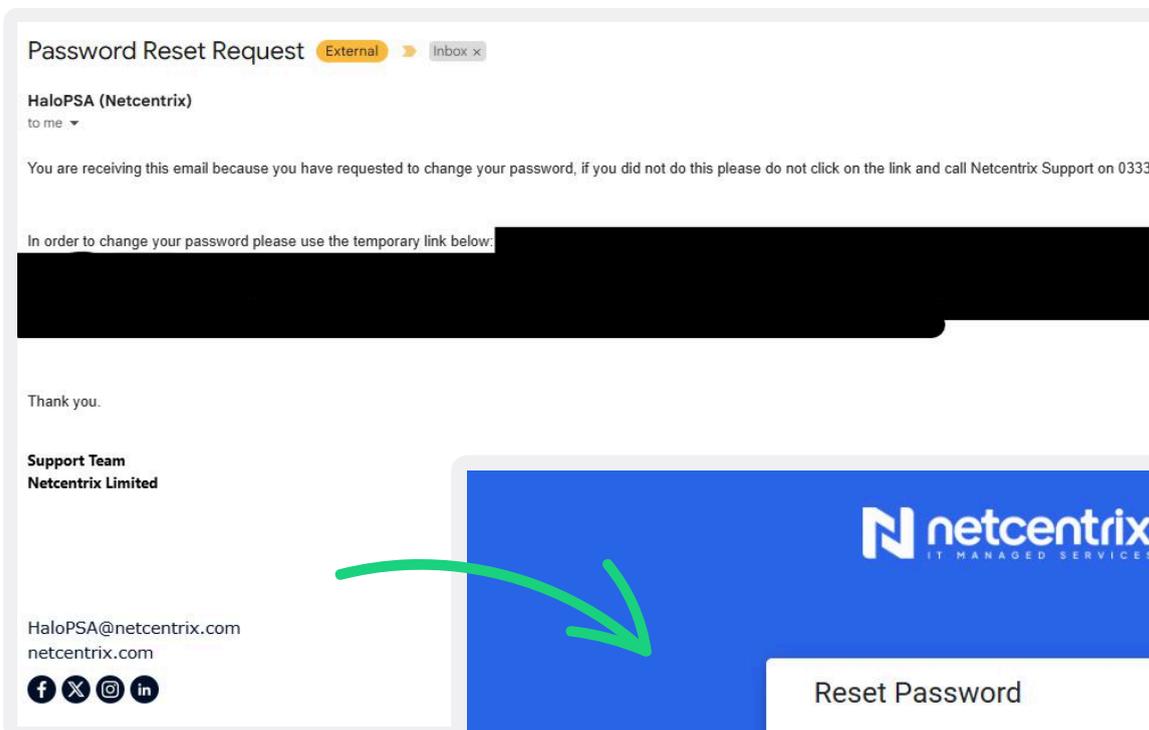
Don't worry if the password reset link has expired follow these steps to generate a new link.

1. Browse to [Customer Portal](#)
2. Click forgotten password.
3. Enter your email address and click submit.



# Customer Portal Password Reset

4. You will then receive a new link to set your password.
5. This link will allow you to set a new password.





**Tel.** 0333 035 4111

**Web.** [netcentrix.com](https://www.netcentrix.com)

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