



Netcentrix Customer Portal

USER GUIDE

Welcome to your Customer Portal

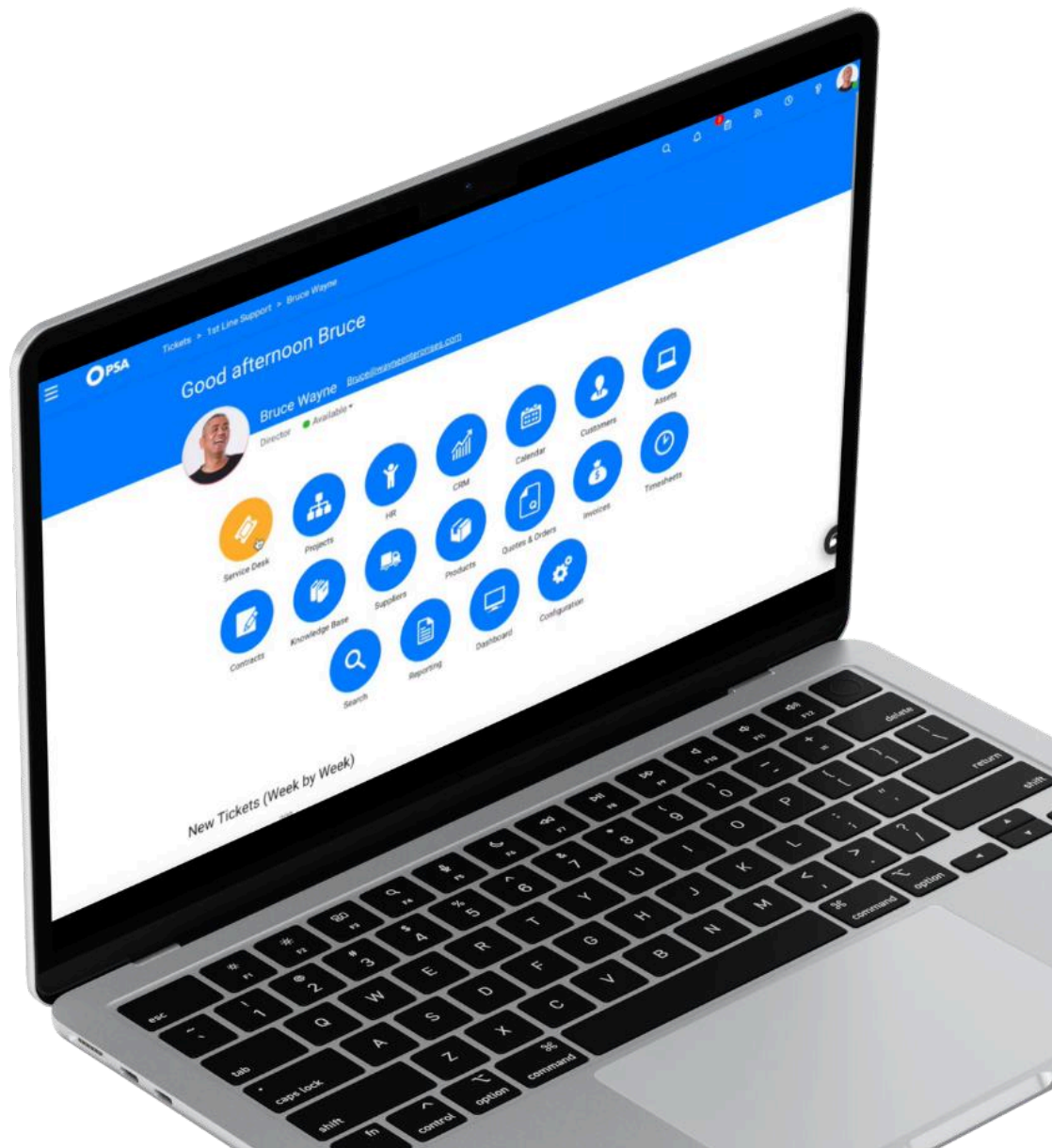
We're excited to introduce your Netcentrix Customer Portal, delivered via HaloPSA, your one-stop platform for managing and accessing all of our services in a seamless and efficient way.

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 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.
 - **My Projects:** Get the latest updates on your inflight projects.
 - **My Quotations:** View and accept any quotations you have received from us.

The screenshot displays the Netcentrix Customer Portal homepage. At the top, the Netcentrix logo is on the left, and navigation links for Home, Report an Issue, My Issues and Requests, My Projects, My Invoices, and CM are on the right. A search bar is positioned below the navigation. The main heading reads "Your Strategic IT Managed Services Partner". Below this is a search bar with the placeholder text "What are you looking for?". The dashboard features six main action cards arranged in a 2x3 grid:

- Report an Issue:** Click here to report a new issue.
- Services and Products:** Request a service or product from the catalogue.
- My Issues and Requests:** View your open and recently closed Tickets, and view their progress or update them.
- My Projects:** View your open and recently closed Projects, and view their progress or update them.
- My Approvals Page:** View Any Approvals Awaiting Your Input.
- My Quotations:** View quotations.

A green callout box with an arrow pointing to the "My Issues and Requests" card contains the following text: "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."

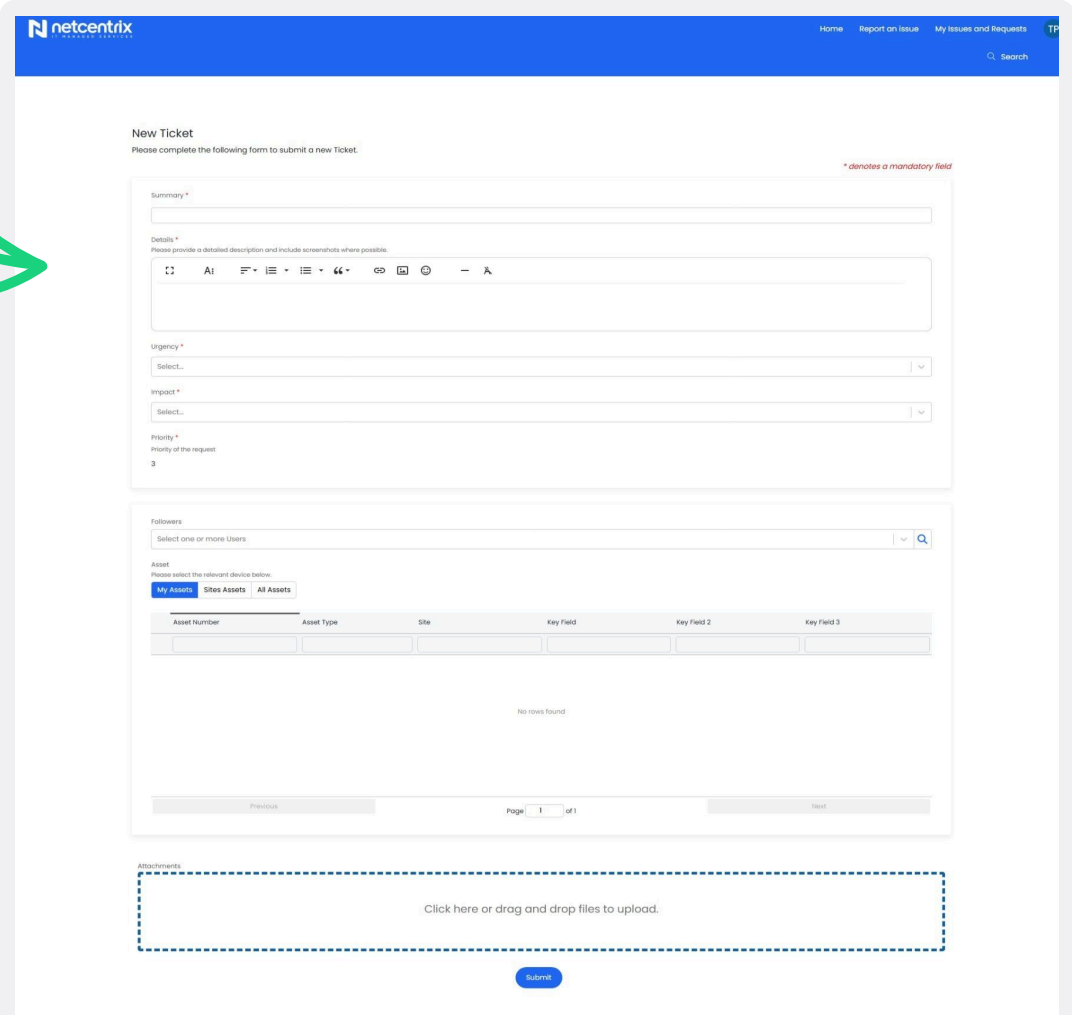
Below the cards is a "Recent Activity" section with a list of user actions:

- Nathan Fisher (Netcentrix) #54213 - Raise Quick Quote Quote 54213-1 created
- Nathan Fisher (Netcentrix) #54213 - New Opportunity Created TEST
- Nathan Fisher (Netcentrix) #51738 - Close SBR
- Nathan Fisher (Netcentrix)

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.



netcentrix Home Report an Issue My Issues and Requests Search

New Ticket
Please complete the following form to submit a new Ticket. * denotes a mandatory field

Summary *

Details *
Please provide a detailed description and include screenshots where possible.

Urgency *

Impact *

Priority *
Priority of the request

Followers
Select one or more Users

Asset
Please select the relevant device below.

My Assets Sites Assets All Assets

Asset Number	Asset Type	Site	Key Field	Key Field 2	Key Field 3

No rows found

Page 1 of 1

Attachments
Click here or drag and drop files to upload.

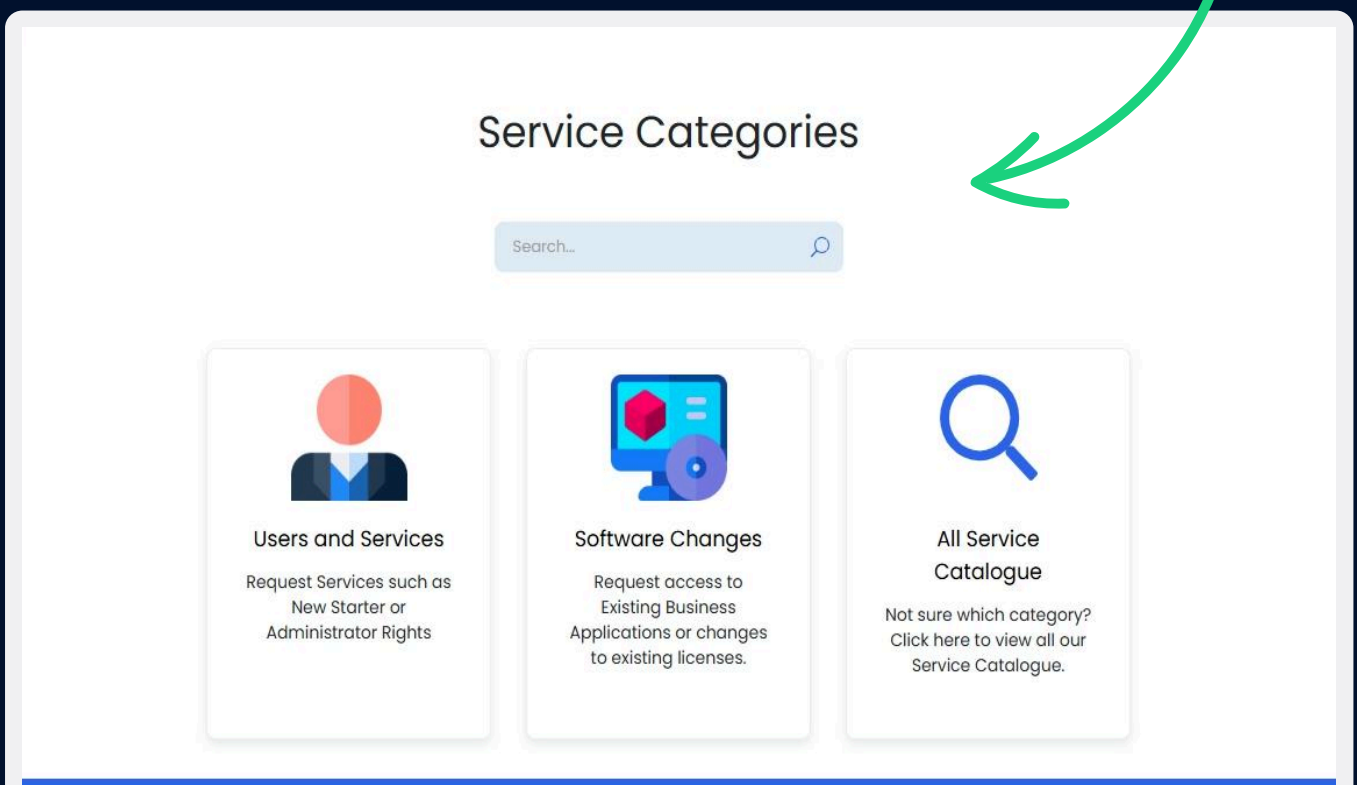
Submit

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.

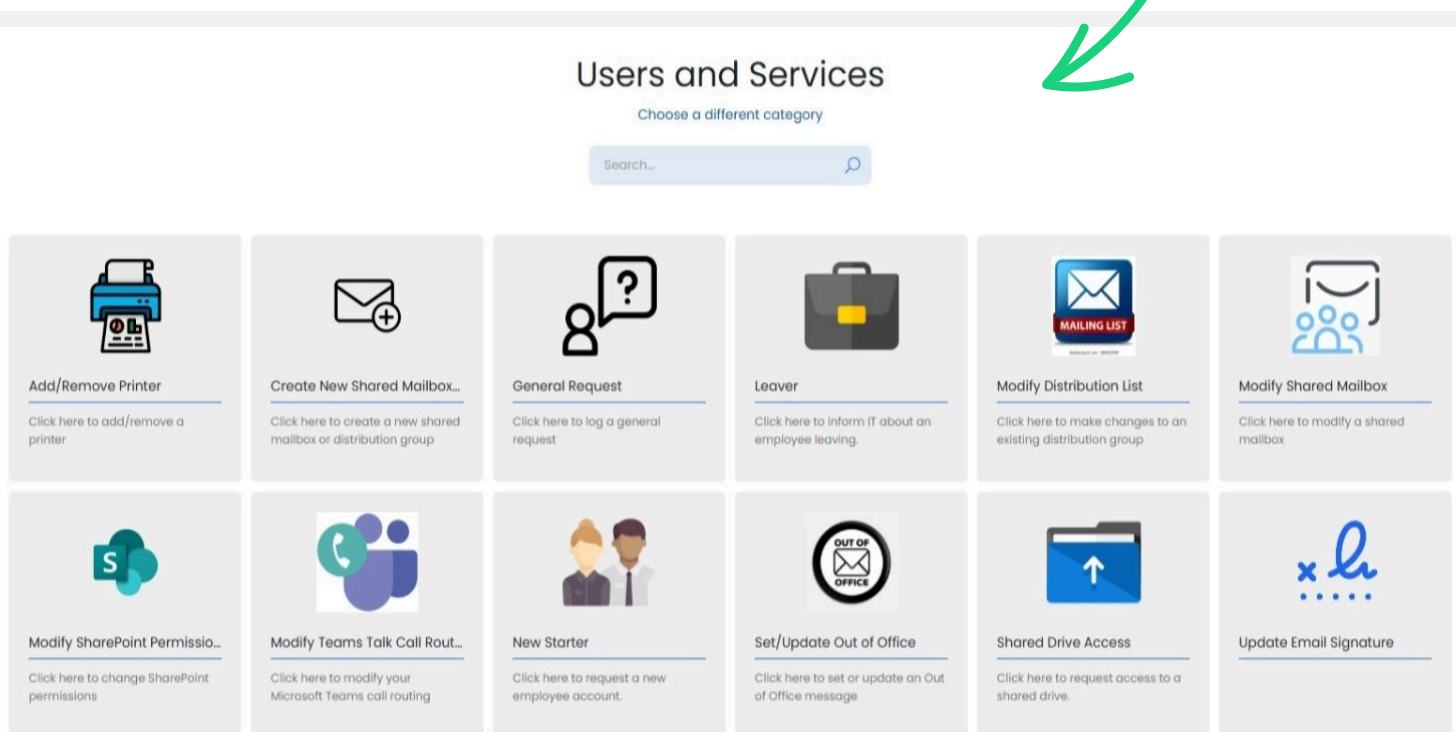
★ Important! – If your User Profile is "Primary Service Contact," you're automatically approved to process all requests. Otherwise, approval is required before processing.



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

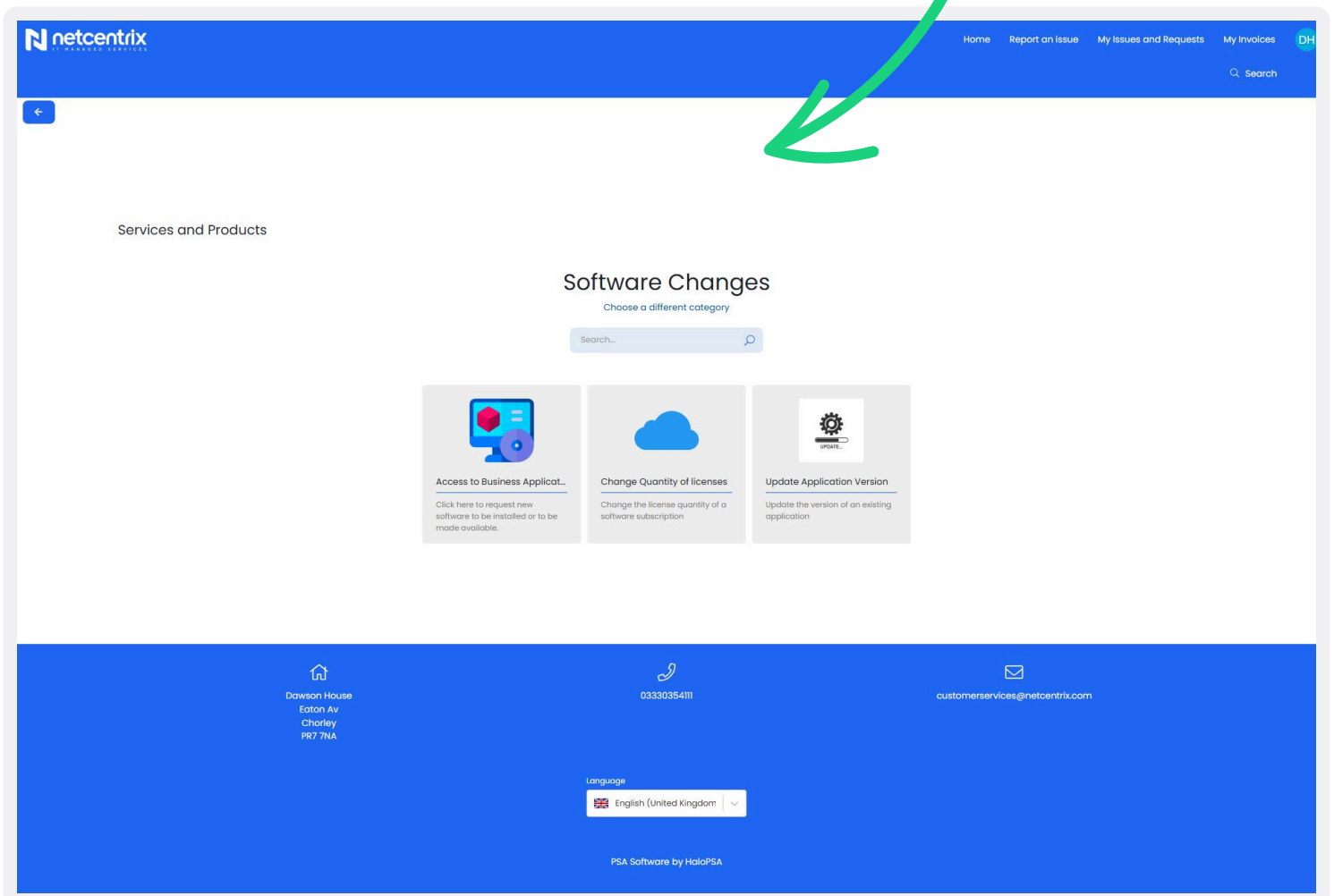
Search_

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

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:

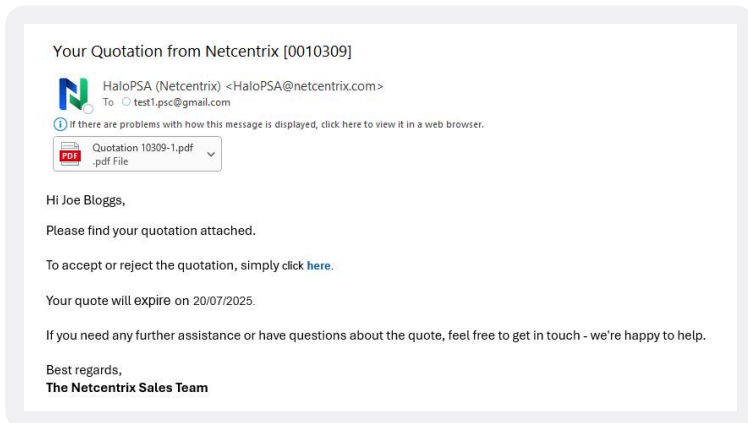
- 1. Access to Business Applications:** This option allows you to manage and modify access to various business applications within your organisation.
- 2. Change Quantity of Licences:** If you need to adjust the number of software licenses for a particular application.
- 3. Update Application Version:** 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, the Netcentrix logo is on the left, and navigation links for Home, Report an Issue, My Issues and Requests, and My Invoices are on the right. A search bar is also present. 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', 'Change Quantity of licenses', and 'Update Application Version'. A green arrow points to 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. A language dropdown menu is set to 'English (United Kingdom)', and the text 'PSA Software by HaloPSA' is visible at the bottom.

Signing Quotations

When we send you a quote for services, you will receive an email from Netcentrix containing a secure link to your quote. You can view it either through the secure link or directly in the portal.

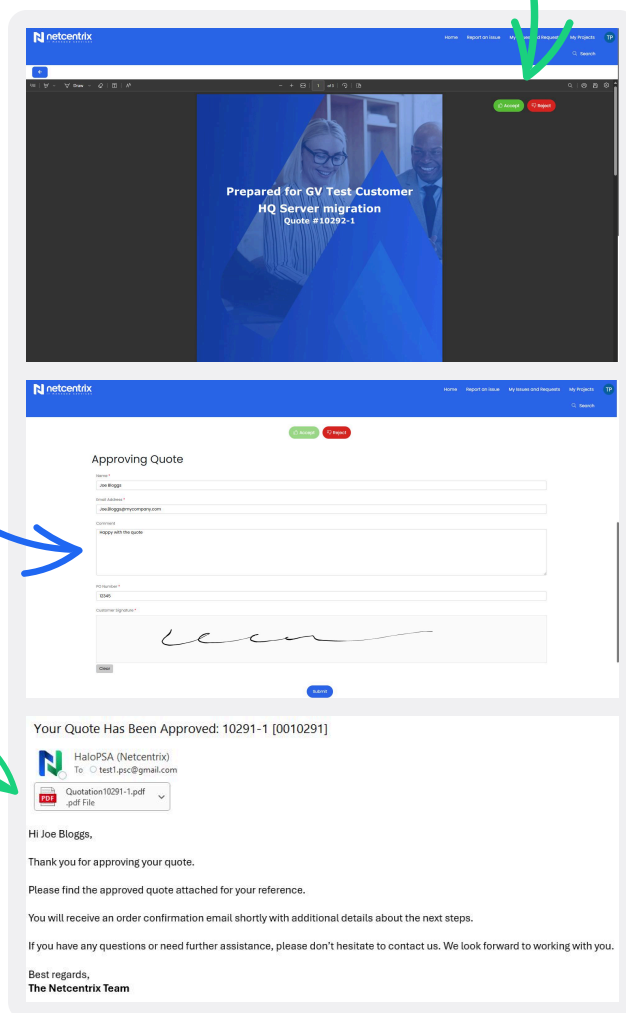


This will take you to the Netcentrix Portal where, once you have reviewed, you can either Accept or Reject the quote.

★ Note: You will need to sign in if you do not already have the Netcentrix Portal open.

When accepting, your name and email address will be pre-populated. You will then need to provide the following information:

- Comment (Optional): If there is any further information you want to provide to support your accepting of the quote.
- PO Number (Mandatory): You can provide a Purchase Order Number if required. If you do not need to provide one, you can put N/A here.
- Customer Signature: Using your mouse (or finger if viewing on a touchscreen device), add your signature.



Once signed, you will receive an email containing the signed version of the quote for your records.

Viewing Existing Quotations

You can view previous quotes via the 'My Quotations' view. This will show all quotations, whether they have been accepted, rejected, or not yet reviewed.

The view shows you the date the quote was sent, its current status, and the total price.

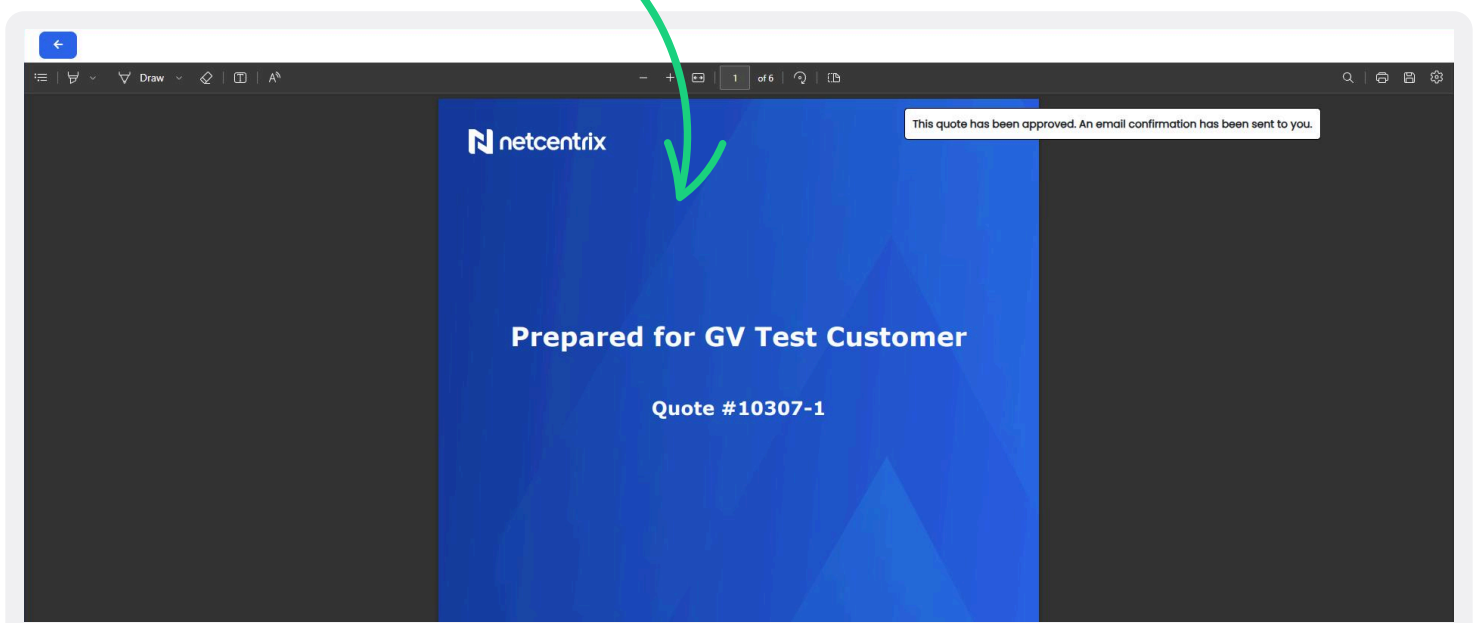
You now have the option to approve quotes directly in your portal account as well as accessing the quote link via email.

The process is easy, simply select 'My quotations' in the portal as shown below, and select your live quote. Any questions please contact your account manager.

Reference	Title	Date	Status	Price
10309-1	HQ Server migration	20/06/2025	Sent	150.00
10293-1	365 Licensing for Support Desk	19/06/2025	Accepted	100.00
10291-1	New server rack for main HQ server room	19/06/2025	Closed	100.00



Note: This is the screen you will see once you've clicked into a quote record.



My Projects

The 'My Projects' view will show you a list of your in-flight projects with Netcentrix where you can see:

1. Current project status
2. Start Date & Target Date of the project
3. Statement of Works
4. Progress updates from Project Managers and Engineers

The screenshot shows the 'My Projects' dashboard. At the top, there are two dropdown menus: 'Open Tickets' and 'All Tickets'. To the right is a search bar labeled 'Search...'. Below these is a table with two columns: 'Summary' and 'SLA Time Left'. The table lists four projects: 'HQ Server Migration', 'Server Rack Installation', '365 Migration', and 'Firewall Upgrade'. In the top right corner, it indicates '1-4 of 4' items.

The screenshot shows the details for a project titled '0010111 HQ Server Migration'. On the left, there is an 'Add Note' button and a note from Martin Daley (Netcentrix) opened today at 9:04 AM. The note content is: 'Project to migrate the customers main server in their HQ from on-premise to the cloud.' On the right, there is a metadata panel with the following information: End-User: Joe Bloggs (My Company Ltd/Main); Date Created: 16/05/2025 09:04; Ticket Type: Project; Status: IN PROGRESS (indicated by a blue progress bar); Start Date: 24/04/2025; Target Date: 23/05/2025.

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.



netcentrix
IT MANAGED SERVICES

Forgotten Password

To reset your HaloPSA password, please enter the Email Address for your account below.

Submit

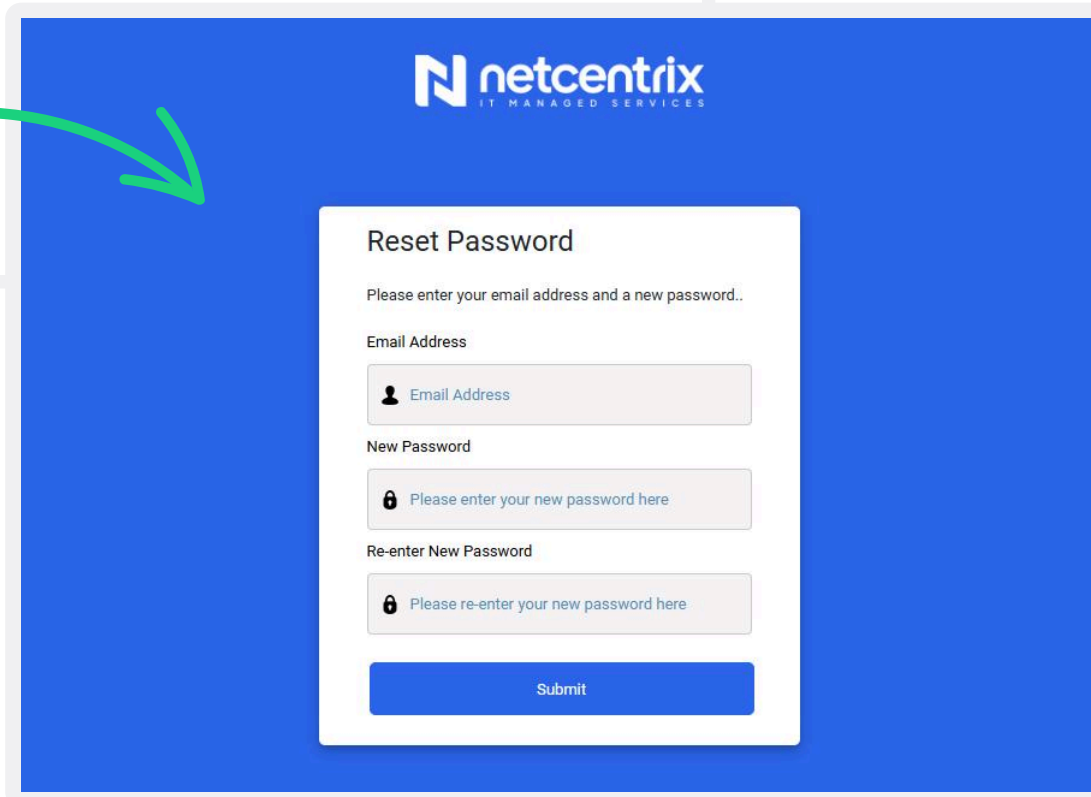
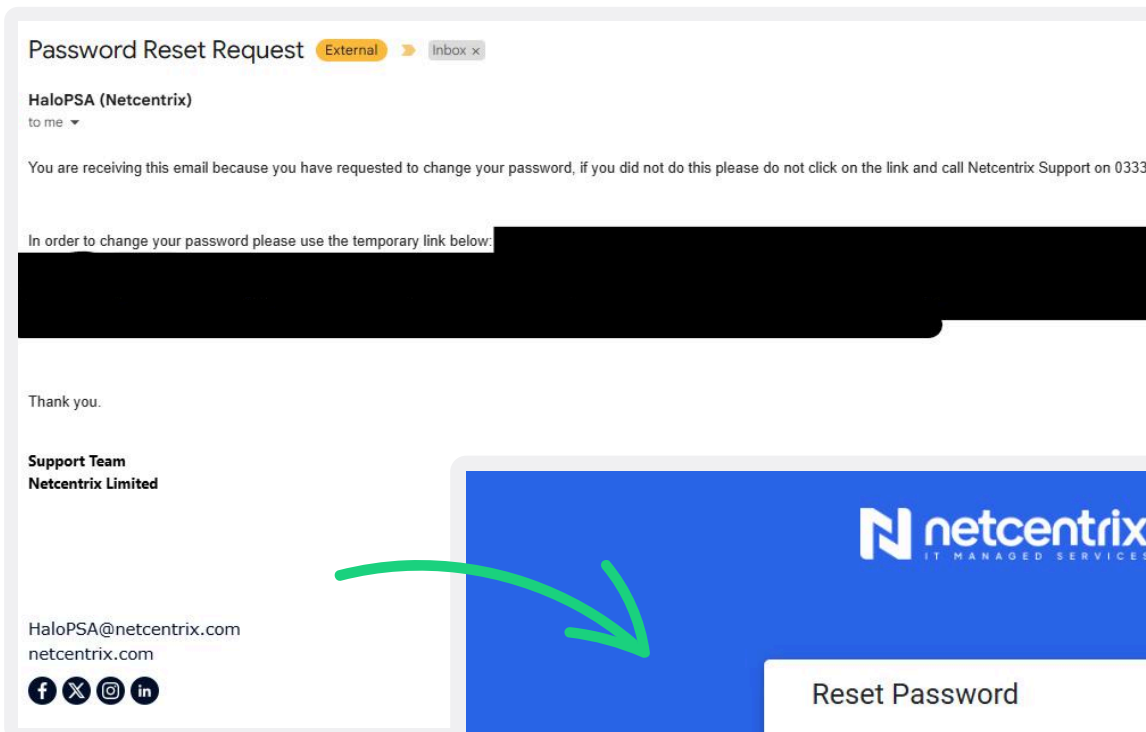
Dawson House

03330354111

customerservices@netcentrix.com

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.



View Invoices

As well as receiving your invoice by email, you can now view and download your invoices in the Netcentrix customer portal. This gives you greater flexibility to access them at any time, view historical invoices, and check their status.

If you are your companies Primary Service Contact and or key billing contact, we have enabled the feature only to you.

Access is easy, simply log into [My Account – Netcentrix](#) and click on ‘My Invoices’ at the top right of the screen as shown below.

You will then be presented with the invoice summary page as shown below, with the ability to click on the invoice and download should you require.

If you have any questions or would like to extend the feature to other team members in your business, please contact your Account Manager who will be happy to help and get set up for you.

The screenshot displays the Netcentrix customer portal dashboard. At the top, the Netcentrix logo is on the left, and navigation links for Home, Report an Issue, My Issues and Requests, My Projects, My Invoices, and CM are on the right. A user notification indicates they are logged in as Charlie Markey. The main header reads "Your Strategic IT Managed Services Partner" above a search bar. The dashboard features six main action tiles: "Report an Issue", "Services and Products", "My Projects", "My Approvals Page", and "My Quotations". A green callout box with a star icon points to the "My Invoices" link in the top navigation, stating: "Note: You can find the My Invoices section of the dashboard here". Below the tiles is a "Recent Activity" section with three entries from Nathan Fisher (Netcentrix).

Activity	Time
Nathan Fisher (Netcentrix) #54213 - Raise Quick Quote Quote 54213-1 created	10 days ago
Nathan Fisher (Netcentrix) #54213 - New Opportunity Created TEST	10 days ago
Nathan Fisher (Netcentrix) #51738 - Close SBR	31 days ago

View Invoices

netcentrix

Home Report an Issue My Issues and Requests My Projects My Invoices CM

You are currently logged in as Charlie Morley. Click here to switch back to your account.

Search

My Invoices

1-1 of 1

ID	Type	Order Number	Invoice Date	Agreement	Value	Total Tax	Total	Due	Date Sent	Payment Status	Invoice Reference
14895	Invoice		10/04/2026		150.00	30.00	180.00	180.00		Unpaid	

N

Invoice

GV Test Customer
 Dawson House
 Matrix Business Park
 Buckshaw Village
 Chorley
 PR7 7NA

Invoice Date: 10/04/2026
Invoice No: 14895
PO Number:

Description	Quantity	Rate	Net
Adobe Software Licensing - Renewal/Coterminus	1	£150.00	£150.00

Please make payments to:
Bank: Lloyds Bank Plc
Account Name: Netcentrix Limited
Account Number: 26460668
Sort Code: 30-80-12
Payment Due Date: 10/05/2026

Sub-total	£150.00
Tax	£30.00
TOTAL	£180.00

★ Note: Click on any invoice to open it, where you'll have the option to view it in your browser or download as a PDF.



Tel. 0333 035 4111

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

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Village, Chorley, PR7 7NA

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