



Netcentrix Customer Portal

USER GUIDE

Welcome to your Customer Portal

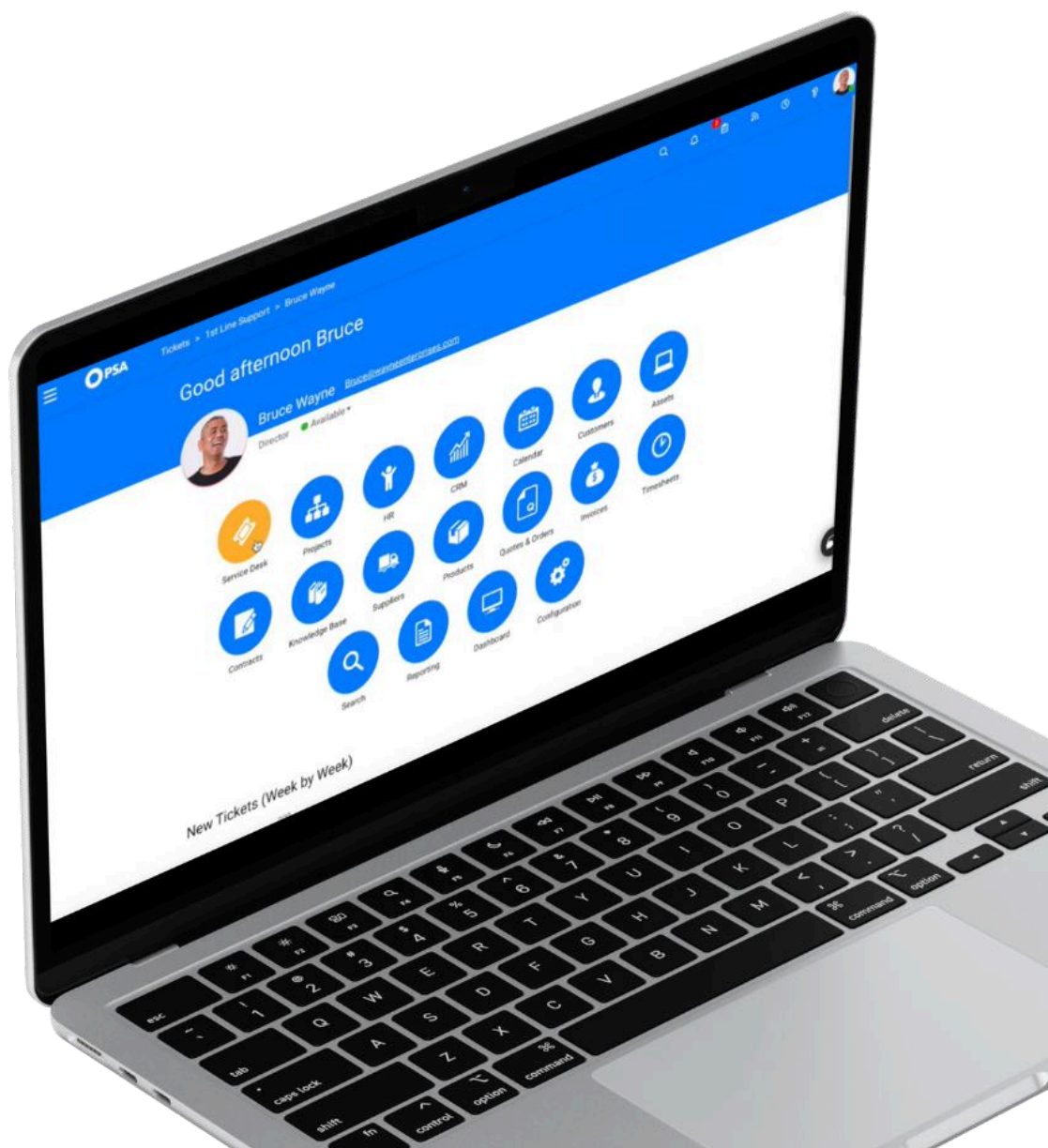
We're excited to introduce your Netcentrix Customer Portal, delivered via HaloPSA, your one-stop platform for managing and accessing all of our services in a seamless and efficient way.

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!



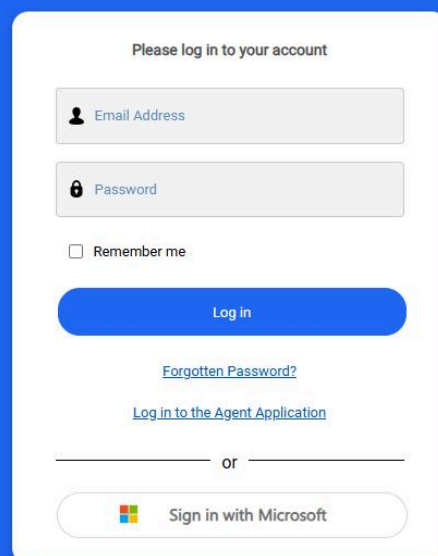
Logging In

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.

A screenshot of the Netcentrix login page. The page has a blue background. At the top center is the Netcentrix logo, which consists of a stylized 'N' followed by the text 'netcentrix' and 'IT MANAGED SERVICES' below it. Below the logo is a white login form. The form has a title 'Please log in to your account'. It contains two input fields: 'Email Address' with a person icon and 'Password' with a lock icon. Below these is a checkbox labeled 'Remember me'. There is a blue 'Log in' button. Below the button are two links: 'Forgotten Password?' and 'Log in to the Agent Application'. At the bottom of the form, there is a horizontal line with 'or' in the center, and below that is a button with the Microsoft logo and the text 'Sign in with Microsoft'. A large green arrow points from the 'Log in here' link in the text above to the login form.

Dawson House, Eaton Av
Chorley, PR7 7NA



03330354111

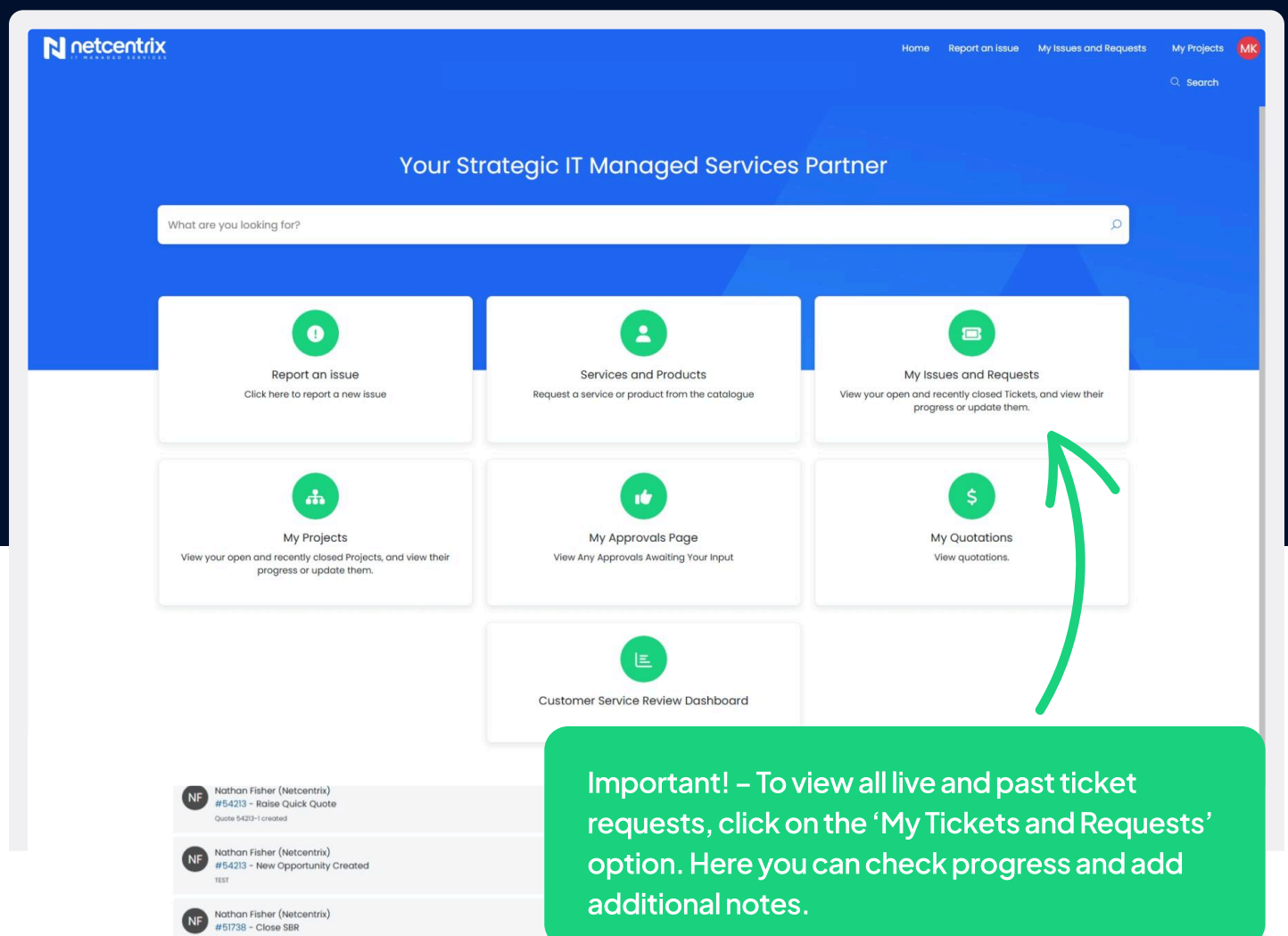


customerservices@netcentrix.com

Portal Homepage

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

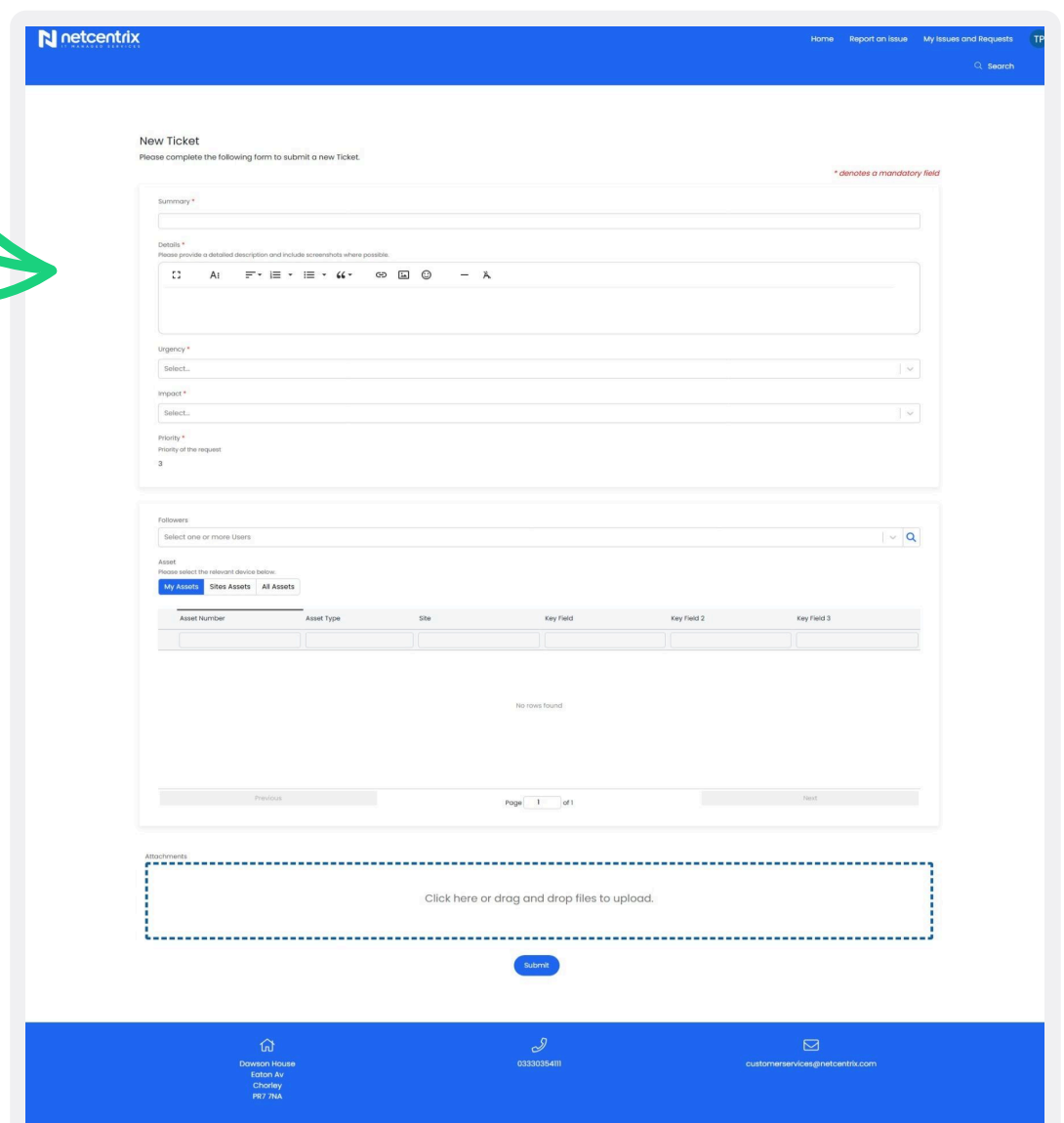
1. **Global Search:** At the top, you'll see a search bar that allows you to search across the entire portal—making it easy to find anything, whether it's a service, ticket, or information you need.
2. Below the search bar, you'll have main options to choose from:
 - **Report an Issue:** Click here to 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.



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.' A green arrow points to the 'Summary' field, which is marked with an asterisk to denote a mandatory field. Below the 'Summary' field is a 'Details' section with a rich text editor. The form also includes dropdown menus for 'Urgency', 'Impact', and 'Priority'. Below these is a 'Followers' section with a search bar and a table for selecting assets. The table has columns for 'Asset Number', 'Asset Type', 'Site', 'Key Field', 'Key Field 2', and 'Key Field 3'. The 'Asset' section is currently empty, showing 'No rows found'. At the bottom of the form is an 'Attachments' section with a dashed box for uploading files. A 'Submit' button is located at the bottom right of the form.

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Home Report an Issue My Issues and Requests TP

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 *

Select...

Impact *

Select...

Priority *

Priority of the request

1

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

Previous Page 1 of 1 Next

Attachments

Click here or drag and drop files to upload.

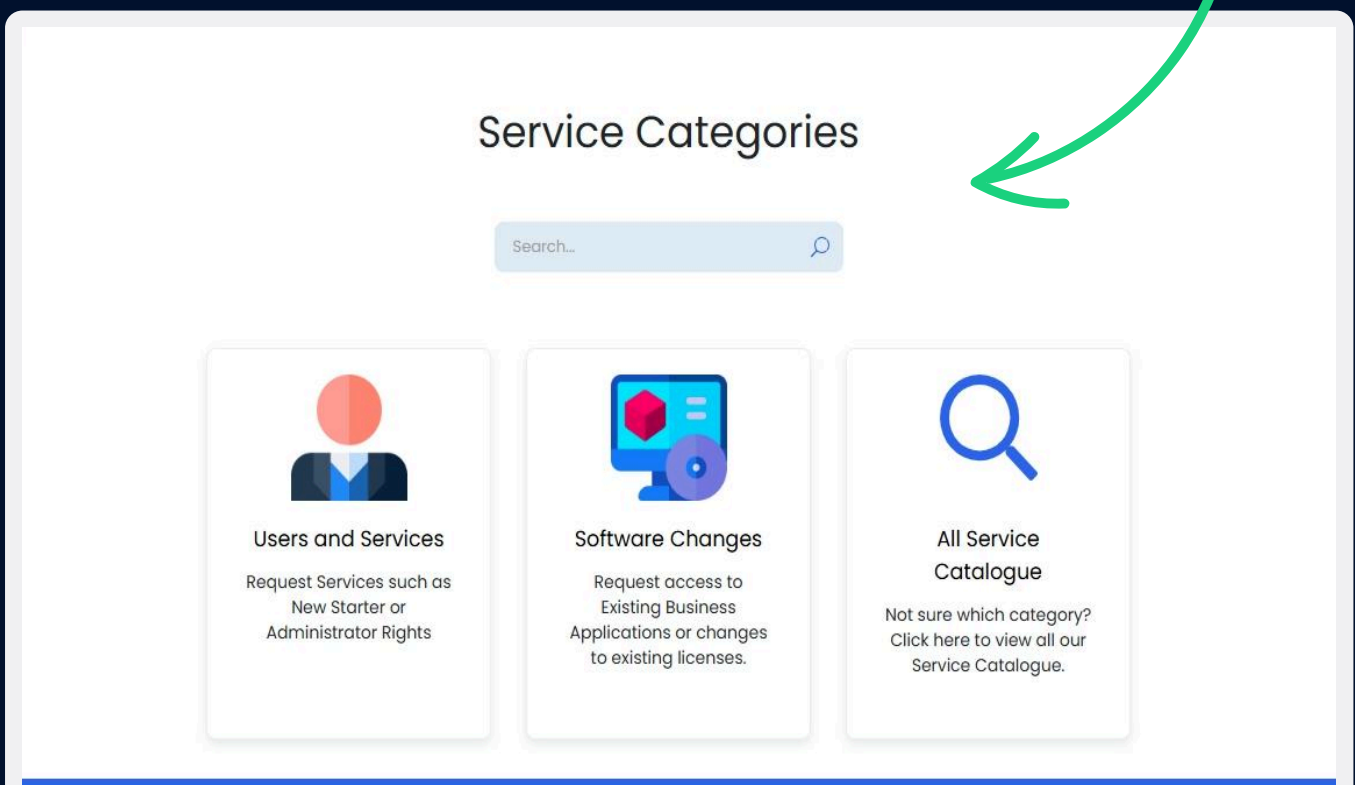
Submit

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.

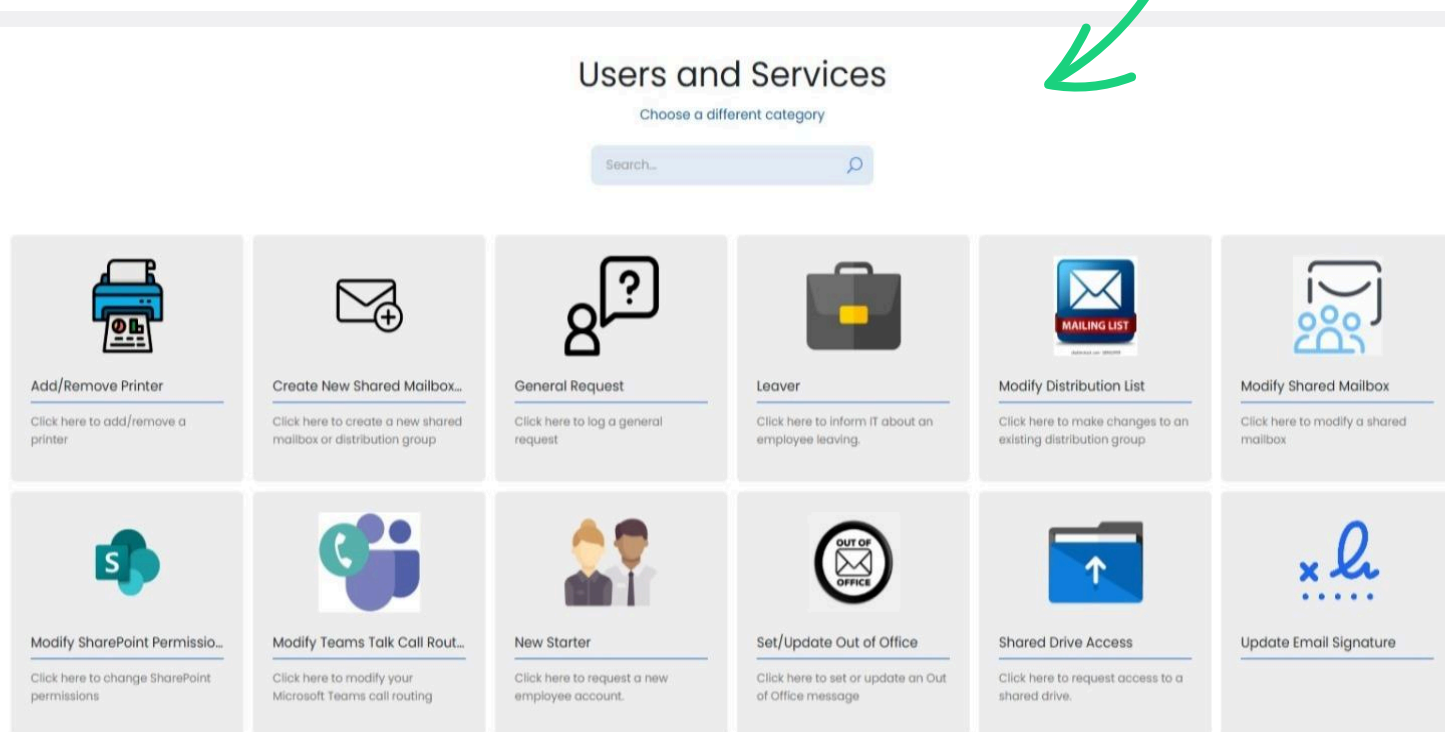
★ Important! – If your User Profile is "Primary Service Contact," you're automatically approved to process all requests. Otherwise, approval is required before processing.



Users & Services

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

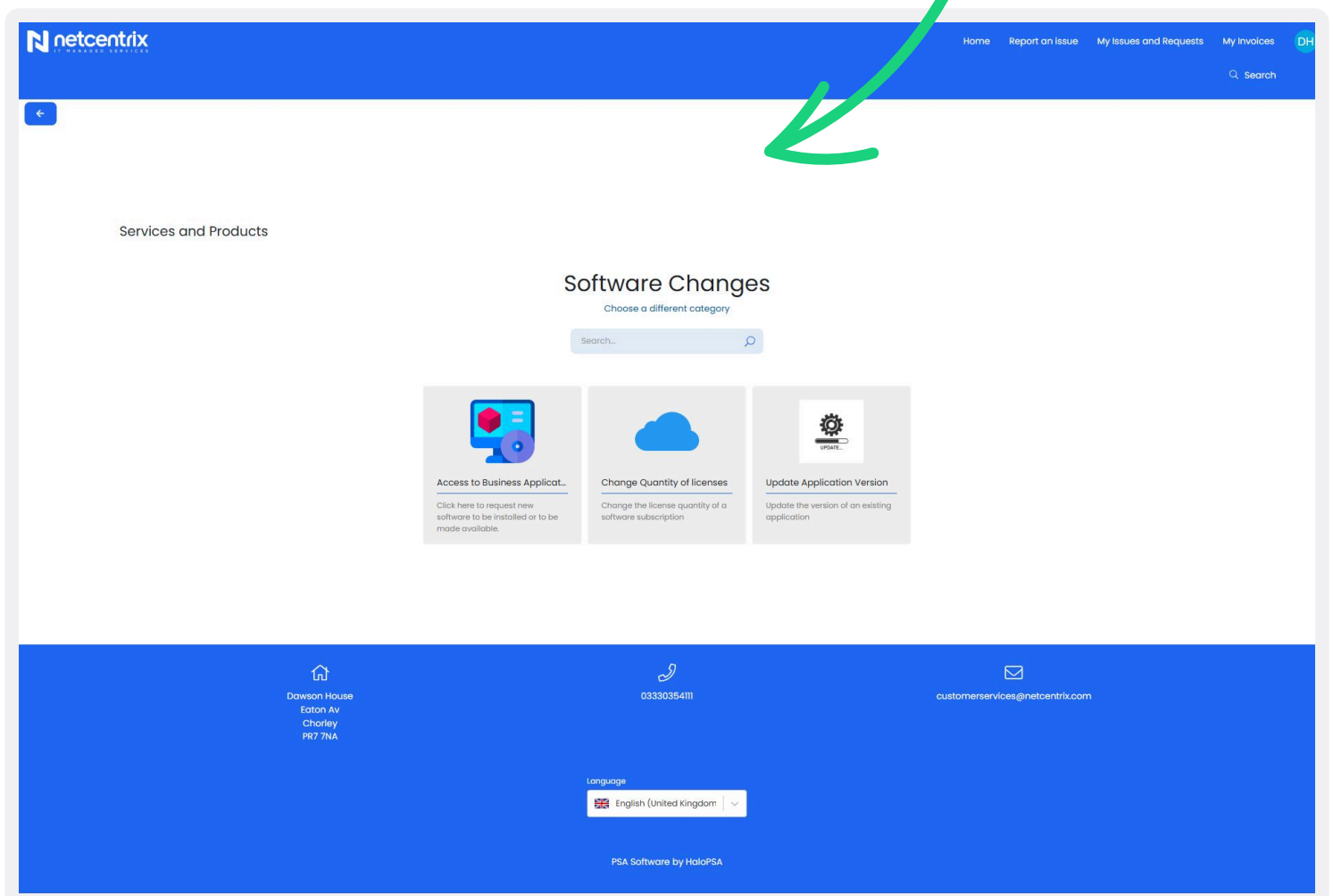
1. **Add/Remove Printer:** Add or remove printers from user profiles.
2. **Create New Shared Mailbox:** Set up a centralised mailbox for team communications.
3. **General Request:** Submit broad user-related requests not covered by other categories.
4. **Leaver:** Manage account access and permissions 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.



Selecting Software Changes

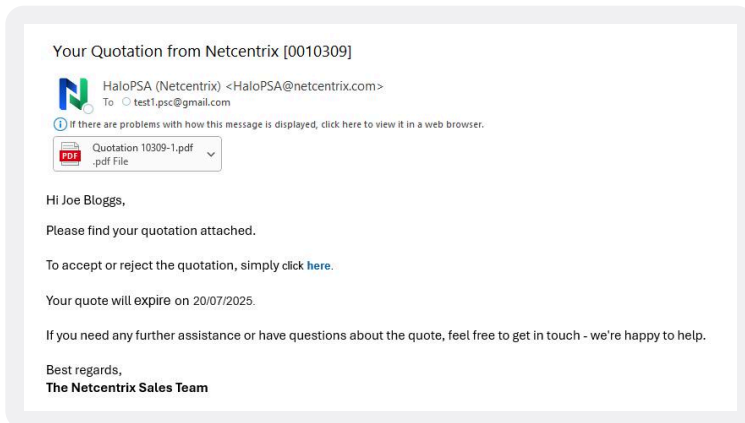
When you select Software Changes, the following options will appear for you to choose from, depending on the type of change you wish to make:

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.



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.

Approving Quote

Name:

Email:

Comment:

PO Number:

Signature:

Your Quote Has Been Approved: 10291-1 [0010291]

HaloPSA (Netcentrix)
To: test1.psc@gmail.com

Quotation 10291-1.pdf

Hi Joe Bloggs,

Thank you for approving your quote.

Please find the approved quote attached for your reference.

You will receive an order confirmation email shortly with additional details about the next steps.

If you have any questions or need further assistance, please don't hesitate to contact us. We look forward to working with you.

Best regards,
The Netcentrix Team

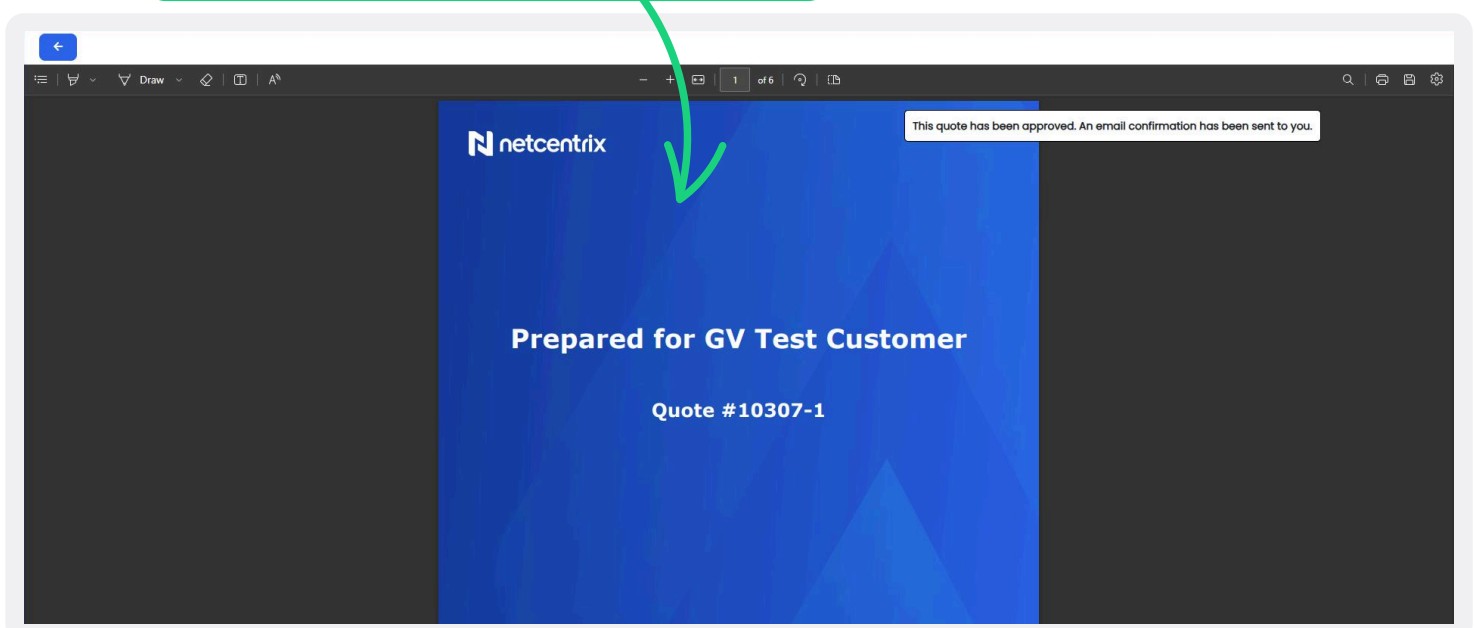
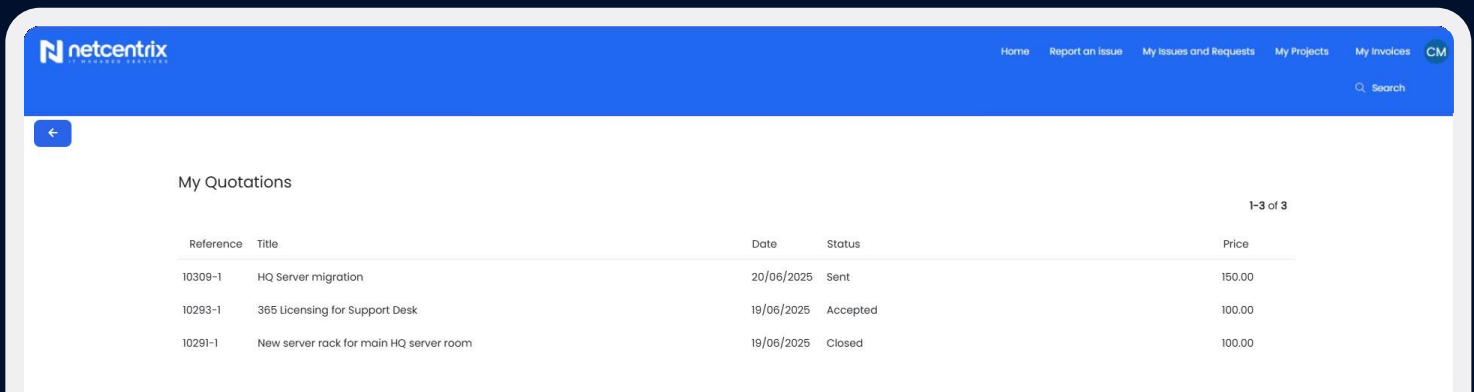
Viewing Existing Quotations

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.



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

My Projects

Open Tickets

All Tickets

Search...

1-4 of 4

Summary

SLA Time Left

HQ Server Migration

Server Rack Installation

365 Migration

Firewall Upgrade

0010111

HQ Server Migration

Add Note

Download

Print

MD

Martin Daley (Netcentrix)

Opened

Today at 8:04 AM

Project to migrate the customers main server in their HQ from on-premise to the cloud.

End-User

TP

Joe Bloggs

My Company Ltd/Main

Date Created

16/05/2025 09:04

Ticket Type

Project

Status

IN PROGRESS

Start Date

24/04/2025

Target Date

23/05/2025

Customer Portal Password Reset

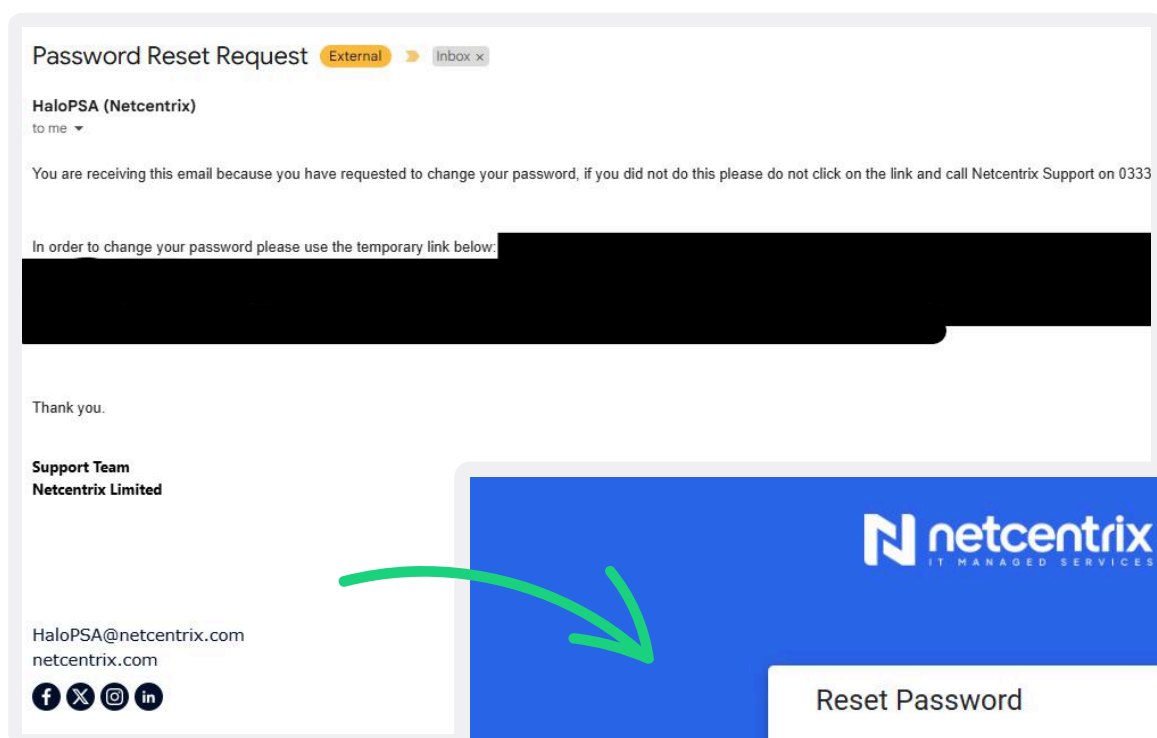
Don't worry if the password reset link has expired follow these steps to generate a new link.

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

A screenshot of the Netcentrix Customer Portal 'Forgotten Password' form. The form is white and centered on a blue background. It features the Netcentrix logo at the top, followed by the title 'Forgotten Password'. Below the title is a message: 'To reset your HaloPSA password, please enter the Email Address for your account below.' There is a text input field with a person icon and the placeholder text 'Email Address'. Below the input field is a blue 'Submit' button. At the bottom of the page, there are three icons: a house icon for 'Dawson House', a phone icon for '03330354111', and an envelope icon for '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.



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IT MANAGED SERVICES

Reset Password

Please enter your email address and a new password..

Email Address

New Password

Re-enter New Password

View Invoices

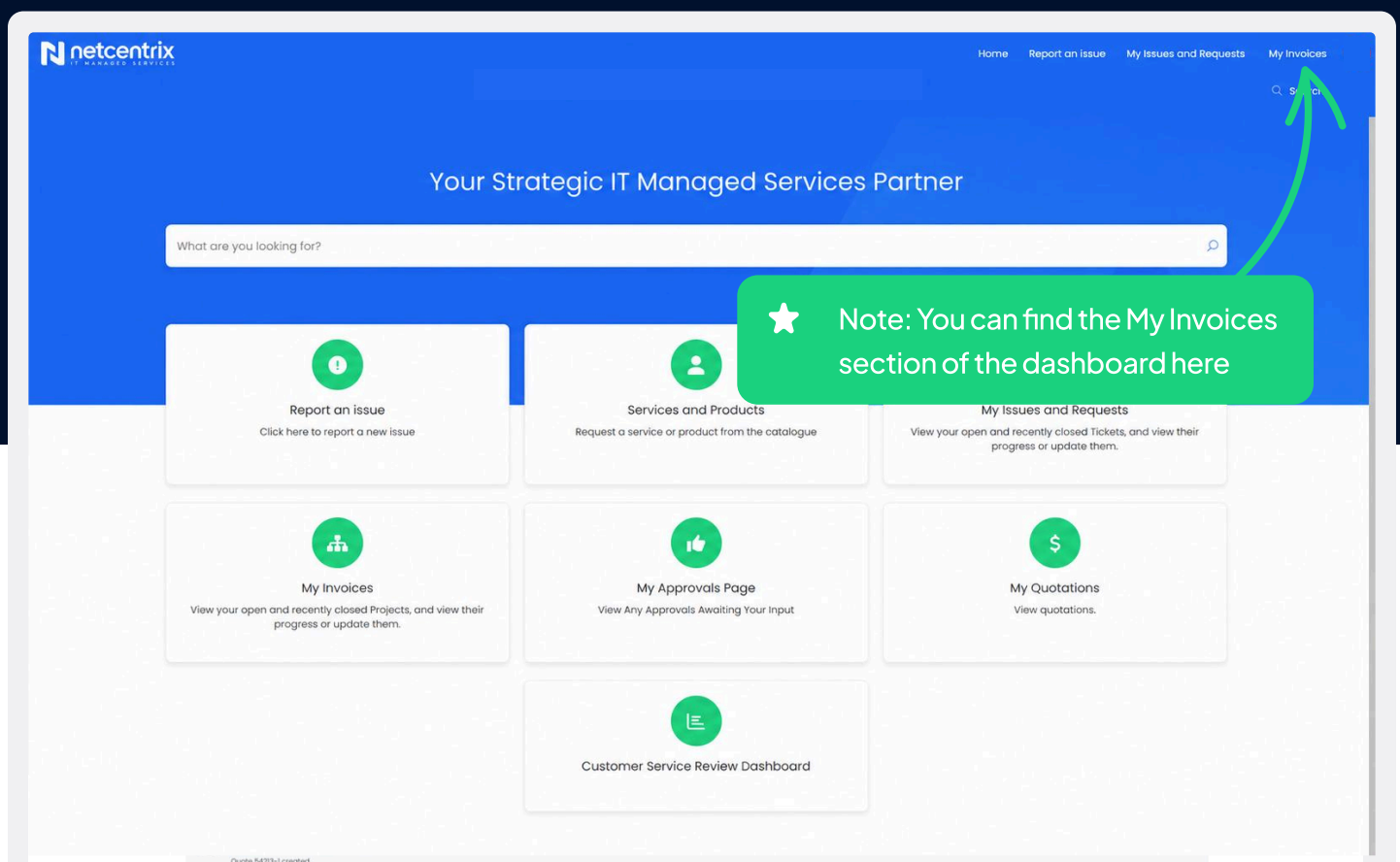
As well as receiving your invoice by email, you can now view and download your invoices in the Netcentrix customer portal. This gives you greater flexibility to access them at any time, view historical invoices, and check their status.

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.



View Invoices

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HomeReport an issueMy Issues and RequestsMy ProjectsMy InvoicesCM

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	





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

Invoice

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.

Customer Services Review Dashboard

The Customer Service Review Dashboard provides a clear view of your support activity and service performance over a selected reporting period. Key features include:

- 1. **Ticket Volumes** – View the number of tickets raised during the selected period, including a breakdown by current status.
- 2. **Response & Resolution Performance** – Monitor response times and resolution performance against agreed service levels (SLAs).
- 3. **SLA Achievement** – Understand how successfully incidents and service requests have been resolved within target timescales.
- 4. **Service Activity Analysis** – Explore support activity through breakdowns by:
 - Contact channel (e.g. portal, email, telephone)
 - Ticket category
 - Priority level
- 5. **Flexible Date Filtering** – Select custom reporting periods to review service trends and performance over time.

★ The Customer Service Review Dashboard is available by request rather than being enabled automatically for all Halo portal users. If you or a colleague would like access, please contact your Netcentrix Account Manager, who can arrange the appropriate user role.

The screenshot displays the Netcentrix Customer Service Review Dashboard. At the top, there's a 'Reporting Period' dropdown set to 'This month'. Below this, the 'Ticket Volumes' section shows four cards: 'Open Incidents' (14), 'Open Requests' (1), 'Closed Incidents' (10), and 'Closed Requests' (0). The next row shows 'Open P1 Incidents' (0), 'Closed P1 Incidents' (0), 'Incident Avg First Response (hrs)' (0.66), and 'Request Avg First Response (hrs)' (0). The 'SLA Achievement' section follows, with 'Incident Resolution SLA %' at 95% and 'Request Resolution SLA %' at 0%. Below that, 'Incident Average P1 Resolution (hrs)' is 0, 'Incident Average P2 Resolution (hrs)' is 1.51, 'Incident Average P3 & P4 Resolution' is 1.44, and 'Request Average Resolution (hrs)' is 0. The 'Service Activity Including Proactive' section contains three charts: 'Tickets Raised by Channel' (a donut chart), 'Tickets by Priority' (a table), and 'Tickets by Category (Top 10)' (a horizontal bar chart). The 'Customer Engagement' section at the bottom includes a 'Feedback Breakdown' chart and a 'Top 5 Portal Users' table.

PRIORITY	OPENED IN MONTH	RESOLVED IN MONTH	BREACHED SLA
P1	0	0	0
P2	10	7	1
P3	5	3	0
P4	0	0	0

USERNAME	EMAIL	LOGIN COUNT	LAST LOGIN
Joe Bloggs	Joe.Bloggs@companyname.co.uk	1	01/10/2026 16:20

Tel. 0333 035 4111

Web. netcentrix.com

Matrix Industrial Park, Eaton Ave Buckshaw
Village, Chorley, PR7 7NA