



Getting Started in the CSP Portal



Introduction

Get up and running fast. This quick-start shows you how to order CSP licenses, pick monthly vs annual billing, co-term new seats with existing renewals, assign licenses to end users, and add teammates with proper portal permissions—everything a new admin needs to manage licenses confidently.

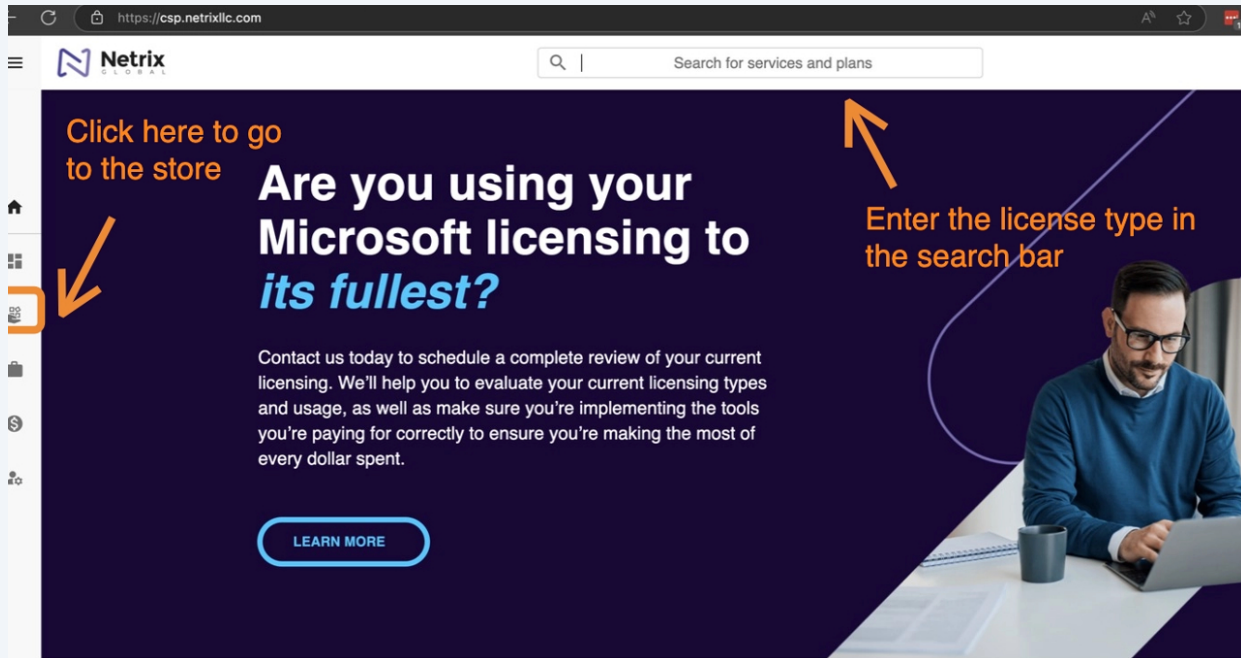
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How to Order Licenses

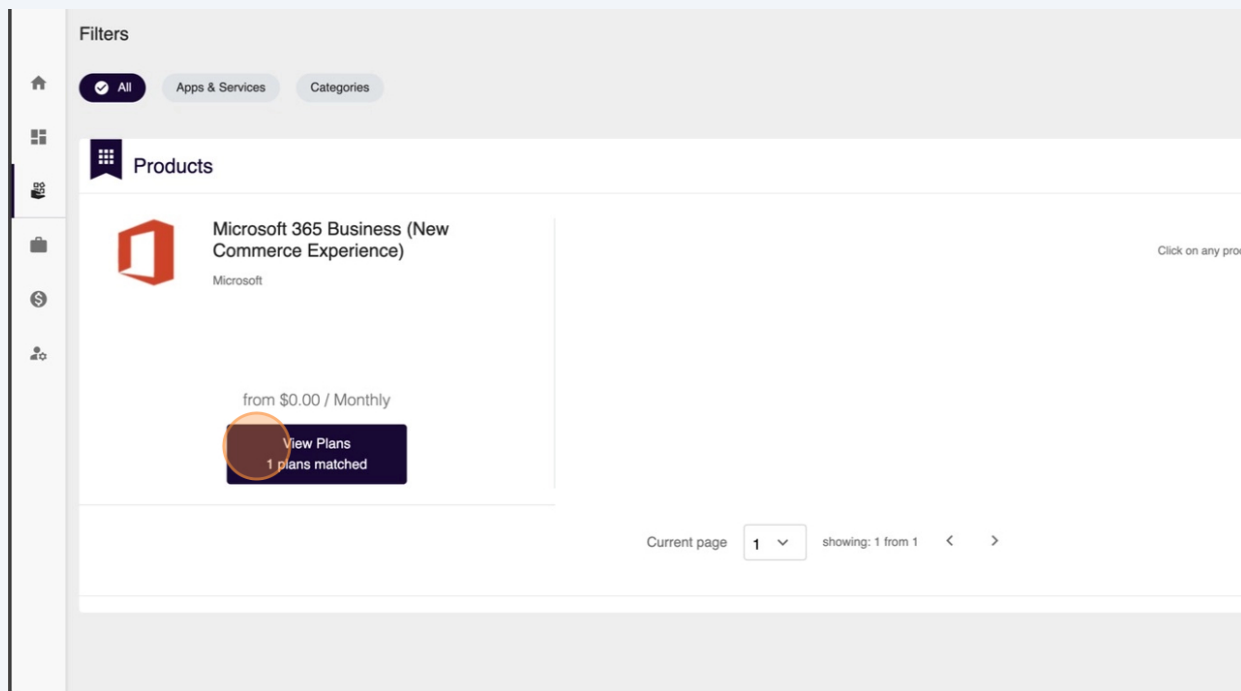
1

There are two ways to search for license types. You can either go to the CSP store or enter the license type you want into the search bar.



2

The search will bring up matching license types. Select "View Plans".



3

From this screen you will be able to see the different pricing options, billing terms, and overview of the license.

The screenshot shows the 'Editions & Pricing (1)' page for Microsoft 365 Business Basic. The page has a search bar at the top with 'Business basic' entered. On the left is a sidebar with the Microsoft 365 logo and navigation links. The main content area displays the product name 'M365 - Microsoft 365 Business Basic (New Commerce)' with a price of '\$0.00' and an 'Add to Basket' button. Above the product name are tabs for 'Monthly' and 'Annually', with an orange arrow pointing to the 'Monthly' tab. An orange text annotation below the arrow reads: 'Select if you want a monthly plan or annual plan'.

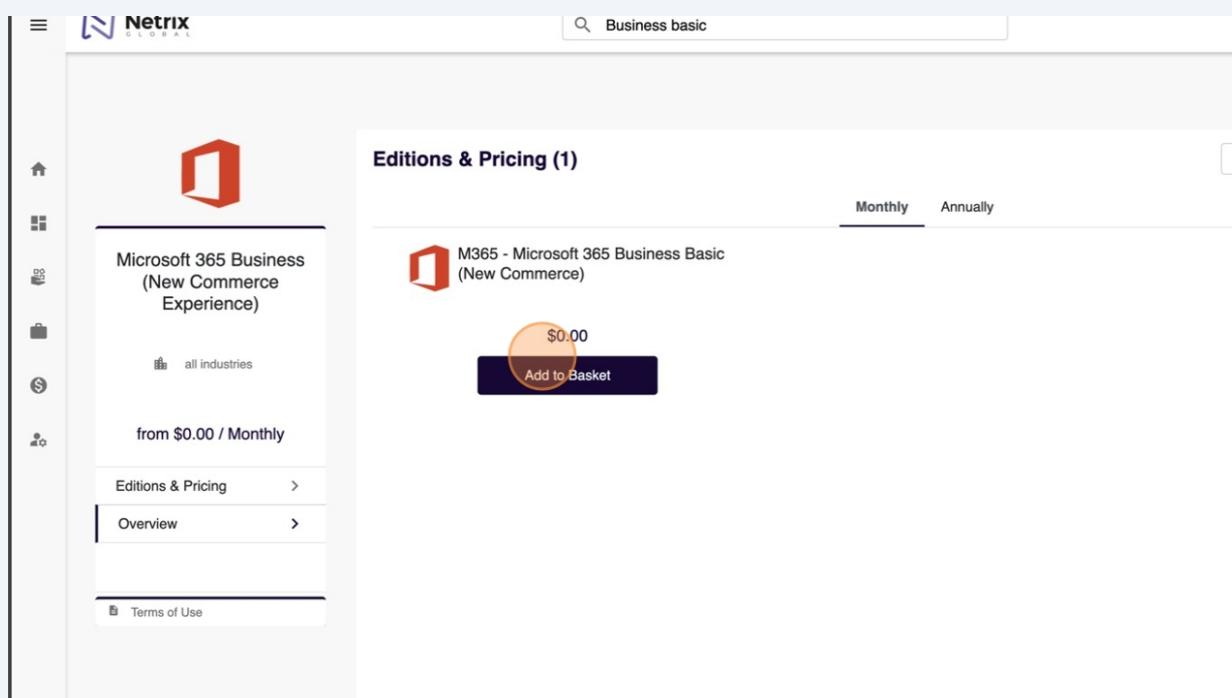


You will need to select which plan type you would like. The pricing for the license will be different depending on whether you select a monthly plan or an annual plan. You will be locked into a monthly or annual contract term based on this selection.

However, you will be able to select your payment options (monthly installments or annual installments) later in the ordering process. For more information on pricing and plans, please visit <https://learn.microsoft.com/en-us/office365/service-descriptions/office-365-platform-service-description/office-365-plan-options>

4

Once you've selected a plan, click "Add to Basket"



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From this screen, you will be able to add a name to the subscription, see pricing, and number of licenses you're purchasing. Click "Proceed to Checkout" to continue the ordering process.

Do you want to define a friendly name for your subscription?

Fill in your preferred name in the following field

New license for Ben Solo

What You Pay

Product	Quantity	Unit Price	Discount	Total
M365 - Microsoft 365 Business Basic (New Commerce)	1	\$0.00/ Monthly	0.00 %	\$0.00
Total Before Tax				\$0.00
Total				\$0.00

Cancel Continue shopping Proceed to checkout



Adding a friendly name for your subscription can make it easier to manage when you have manage multiple subscriptions

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Choose if you would like to purchase the license immediately or on a specifically scheduled date.

The screenshot shows the 'Basket Items' section of the CSP Portal. At the top, there are three steps: '1 Basket Items', '2 Billing Information', and '3 Confirmation'. The 'Order Execution' toggle is set to 'Immediate'. Below this, a table lists the product details:

Product Name	Quantity	Unit Price	Discount	Total	Actions
M365 - Microsoft 365 Business Basic (New Commerce) End-Date Alignment ☐	1	\$0.00 / Monthly	0.00 %	\$0.00	

Below the table, there is a checkbox labeled 'I agree to the Terms Of Use for this Product' which is currently unchecked. A 'Checkout' button is located at the bottom right of the section.

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Review and agree to the Terms of Use and then select "Checkout"

The screenshot shows the 'Basket Items' section of the CSP Portal. The 'Order Execution' toggle is now set to 'Scheduled'. A yellow banner states: 'Prices are subject to change and will be updated on the scheduled execution date'. The table below shows the same product details as in the previous screenshot:

Product Name	Quantity	Unit Price	Discount	Total	Actions
M365 - Microsoft 365 Business Basic (New Commerce) End-Date Alignment ☐	1	\$0.00 / Monthly	0.00 %	\$0.00	

Below the table, the checkbox labeled 'I agree to the Terms Of Use for this Product' is now checked. An orange arrow points to this checkbox. The 'Checkout' button is highlighted with an orange circle at the bottom right.



You can co-term this subscription to your other subscriptions during the checkout process. For more details on how to do so, please go to the "How to co-term" section (Step 14) of this guide for more information.

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in order to complete the checkout process, you need to accept the "Terms of Use"

Product Name	Quantity	Unit Price	Discount
M365 - Microsoft 365 Business Basic (New Commerce)	2	\$0.00 / Monthly	0.00 %

☐ I agree to the Terms Of Use for this Product

Checkout

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Review billing information and select "Checkout" to complete your order

Netrix - checkout

Search for services and plans

1 Basket Items

2 Billing Information

3 Confirmation

Checkout

2 Billing Information

Billing Address

Address

City

Schaumburg

Country

United States

Post Code

60173-5853

State / Province

Phone

Who would you like to receive your invoices?

You can change the details of your existing billing contact in My Account

Existing billing contact

Name

Han Solo

Email

Back

Checkout

How to view the status of your order

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Once you've completed the checkout process, you will receive a confirmation email that your order has been received and a notification in the CSP portal.

Search for services and plans

2 Billing Information

3 Confirmation

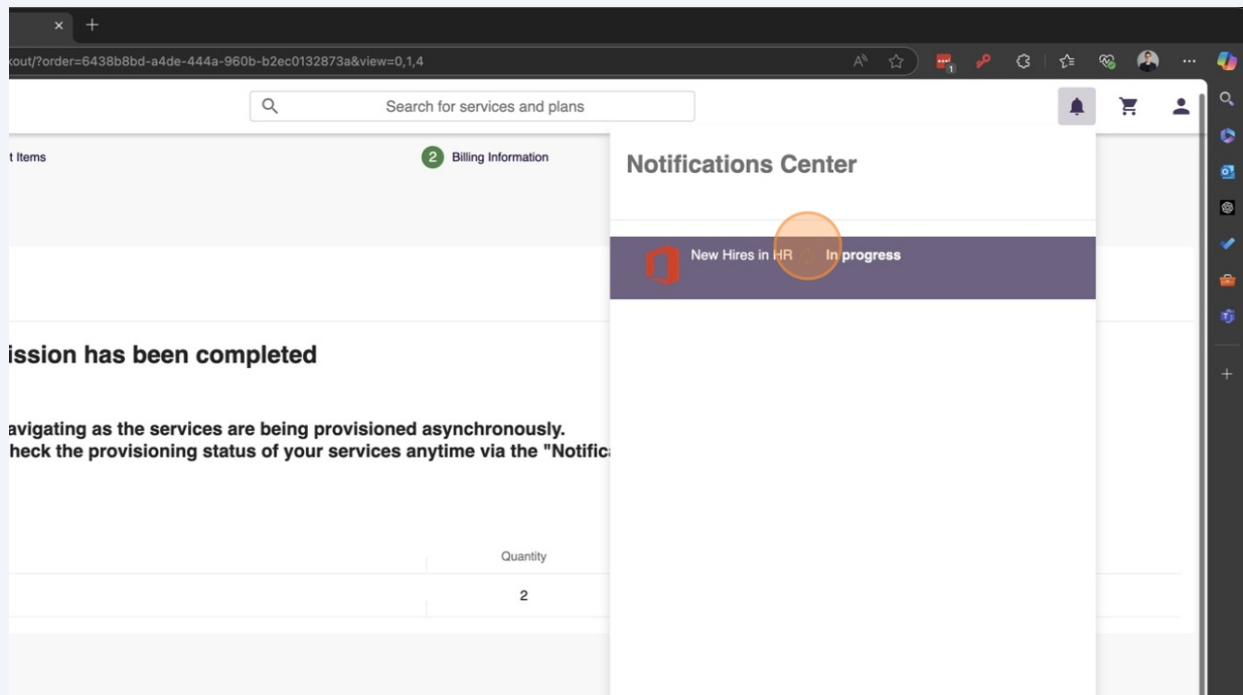
Your order has been completed

We are navigating as the services are being provisioned asynchronously.
Check the provisioning status of your services anytime via the "Notification Center".

Quantity	Activation Date	Billing Cycle
2	05/29/2025	Monthly

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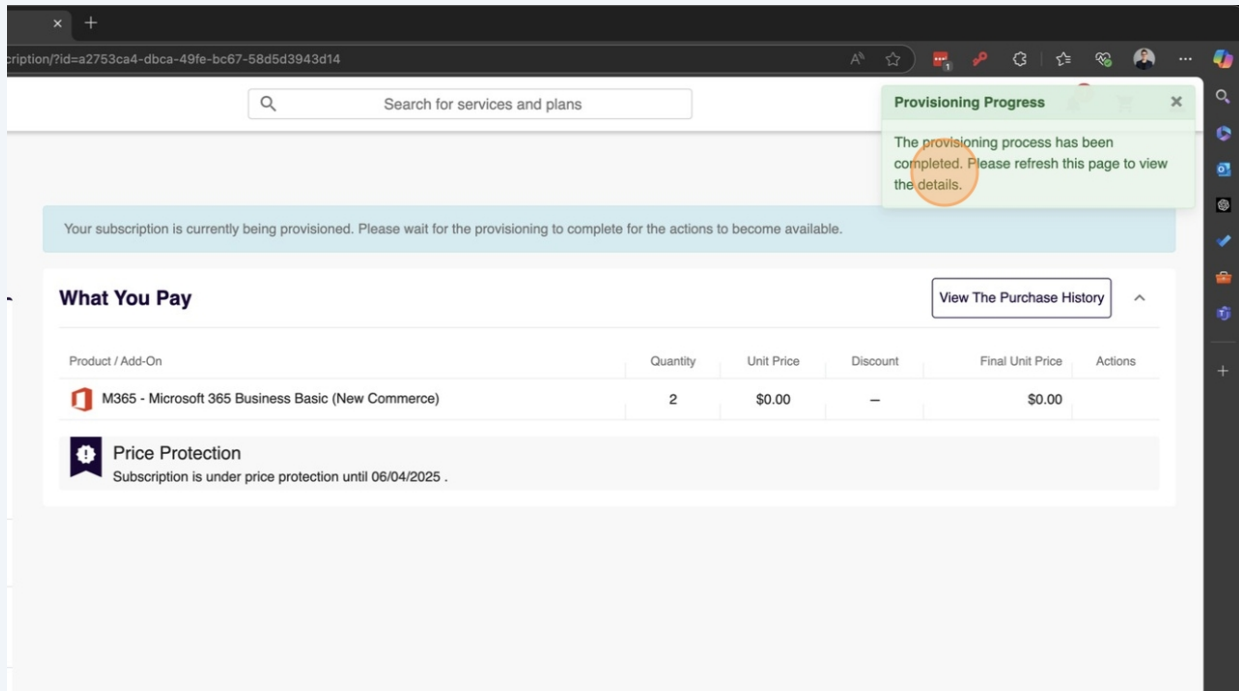
All notifications, including order status, will be shown in the Notification Center



It can take up to 15 minutes for a license to be provisioned and ready for use

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You will also be able to see the status of provisioning if you click on the notification itself



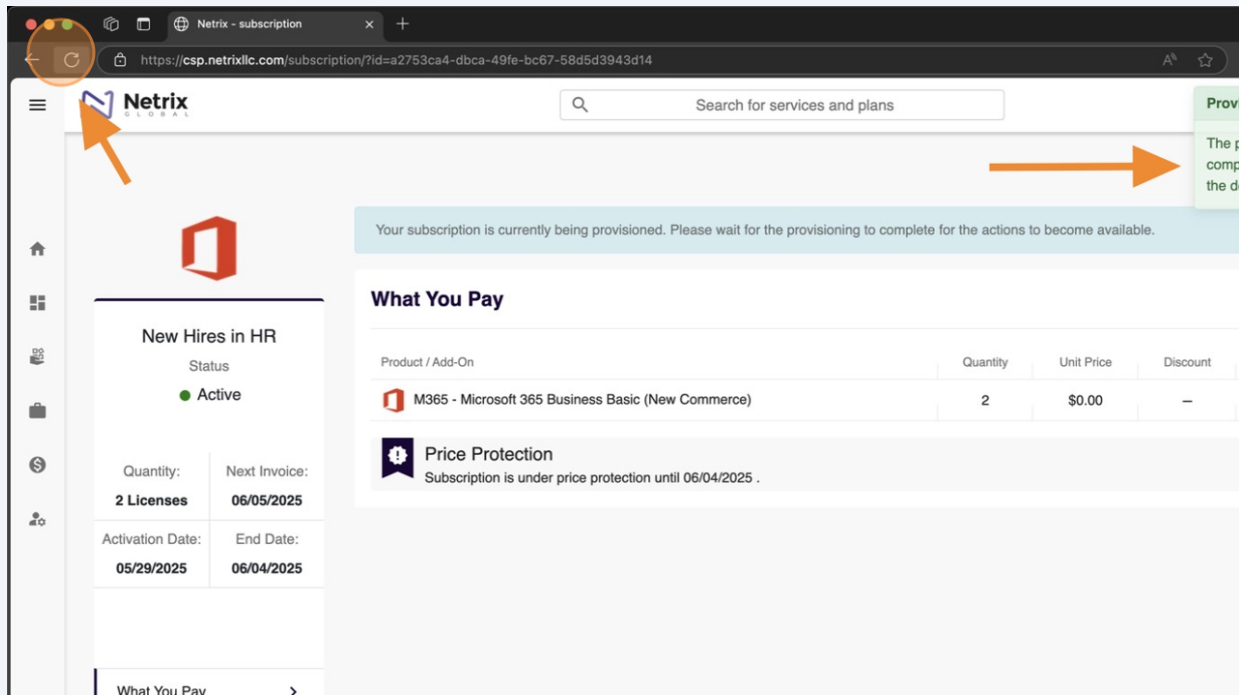
The screenshot shows a web browser window with the URL `https://csp.netrixllc.com/subscription/?id=a2753ca4-dbca-49fe-bc67-58d5d3943d14`. A green notification box titled "Provisioning Progress" is displayed, stating: "The provisioning process has been completed. Please refresh this page to view the details." Below the notification, a blue banner reads: "Your subscription is currently being provisioned. Please wait for the provisioning to complete for the actions to become available." The "What You Pay" section is visible, showing a table with the following data:

Product / Add-On	Quantity	Unit Price	Discount	Final Unit Price	Actions
M365 - Microsoft 365 Business Basic (New Commerce)	2	\$0.00	—	\$0.00	

Below the table, there is a "Price Protection" section stating: "Subscription is under price protection until 06/04/2025." A "View The Purchase History" button is located at the top right of the "What You Pay" section.

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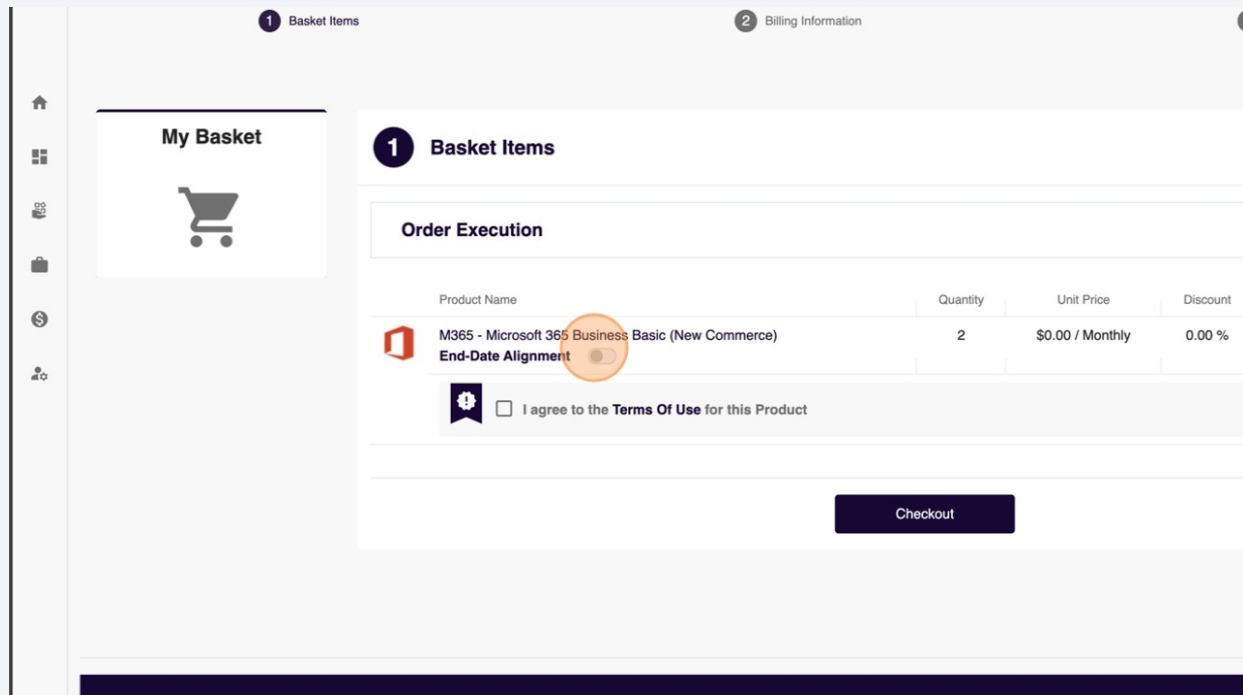
Once you receive the confirmation that provisioning is completed, click "Refresh"



The screenshot shows the same web browser window as the previous one. An orange arrow points to the "Refresh" button in the browser's address bar. Another orange arrow points to the "Provisioning Progress" notification box. The "What You Pay" section is also visible, showing the same data as in the previous screenshot. The "New Hires in HR" section is also visible on the left side of the page, showing a status of "Active" and a quantity of "2 Licenses".

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When on the "My Basket" page, select the check box next to "End-Date Alignment".



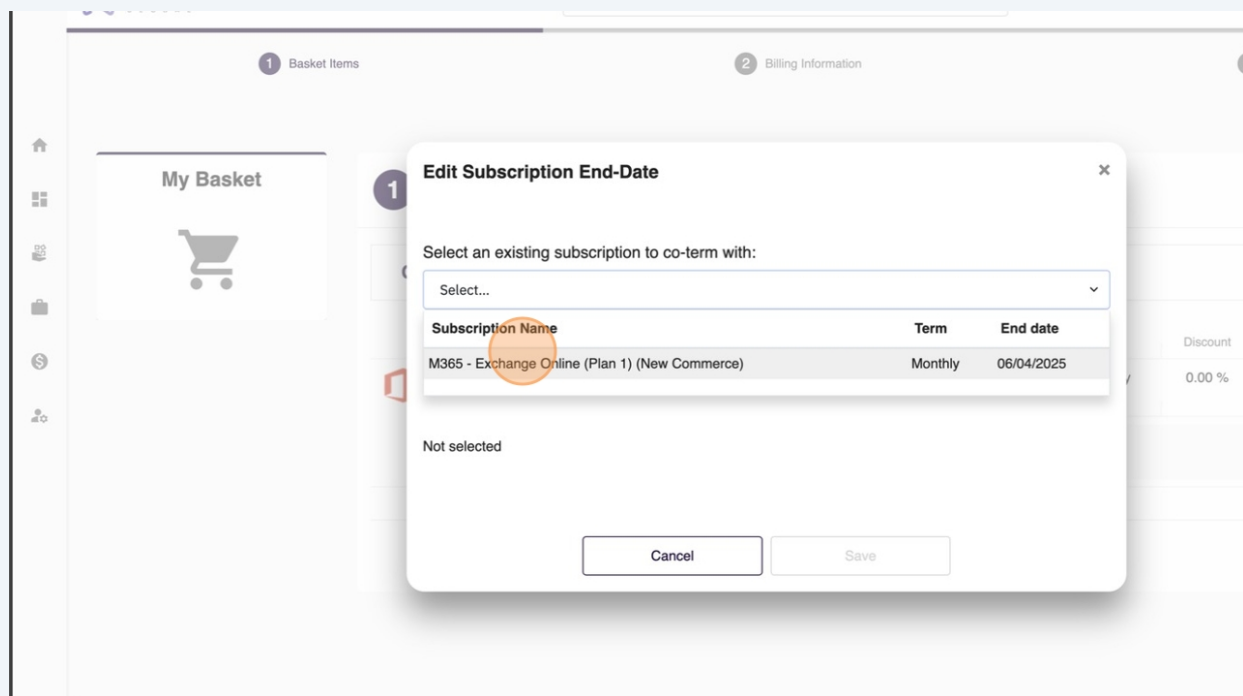
The screenshot shows the 'My Basket' page with a sidebar on the left containing navigation icons. The main content area is titled '1 Basket Items' and includes a section for 'Order Execution'. Below this, there is a table with the following data:

Product Name	Quantity	Unit Price	Discount
M365 - Microsoft 365 Business Basic (New Commerce)	2	\$0.00 / Monthly	0.00 %

Below the table, there is a checkbox labeled 'End-Date Alignment' which is highlighted with an orange circle. Below the checkbox, there is a link to 'Terms Of Use' for this Product. At the bottom right of the 'Basket Items' section, there is a 'Checkout' button.

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This will bring up a pop-up window that will have a drop-down menu for you to select which of the existing subscriptions you have, that you would like to align the contract end dates with.



The screenshot shows the 'My Basket' page with a sidebar on the left. A pop-up window titled 'Edit Subscription End-Date' is displayed in the foreground. The pop-up contains a drop-down menu labeled 'Select an existing subscription to co-term with:' with a 'Select...' option. Below the drop-down, there is a table with the following data:

Subscription Name	Term	End date
M365 - Exchange Online (Plan 1) (New Commerce)	Monthly	06/04/2025

The 'M365 - Exchange Online (Plan 1) (New Commerce)' row is highlighted with an orange circle. Below the table, there is a 'Not selected' label. At the bottom of the pop-up, there are 'Cancel' and 'Save' buttons.

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Once you've selected the contract subscription you would like to co-term the new license end date to, you will select "Save". This will take you back to the "My Basket" screen where you will be able to continue the ordering process.

Edit Subscription End-Date

Select an existing subscription to co-term with:

M365 - Exchange Online (Plan 1) (New Commerce)

Adjustment Preview

The end date of the subscription will be changed to match the renewal date of the selected existing subscription. If the first term is shorter than a full term, the charges will be prorated. Any subsequent renewal will run for the full term.

Subscription Name	Term	End date
M365 - Exchange Online (Plan 1) (New Commerce)	Monthly	06/04/2025

Cancel Save

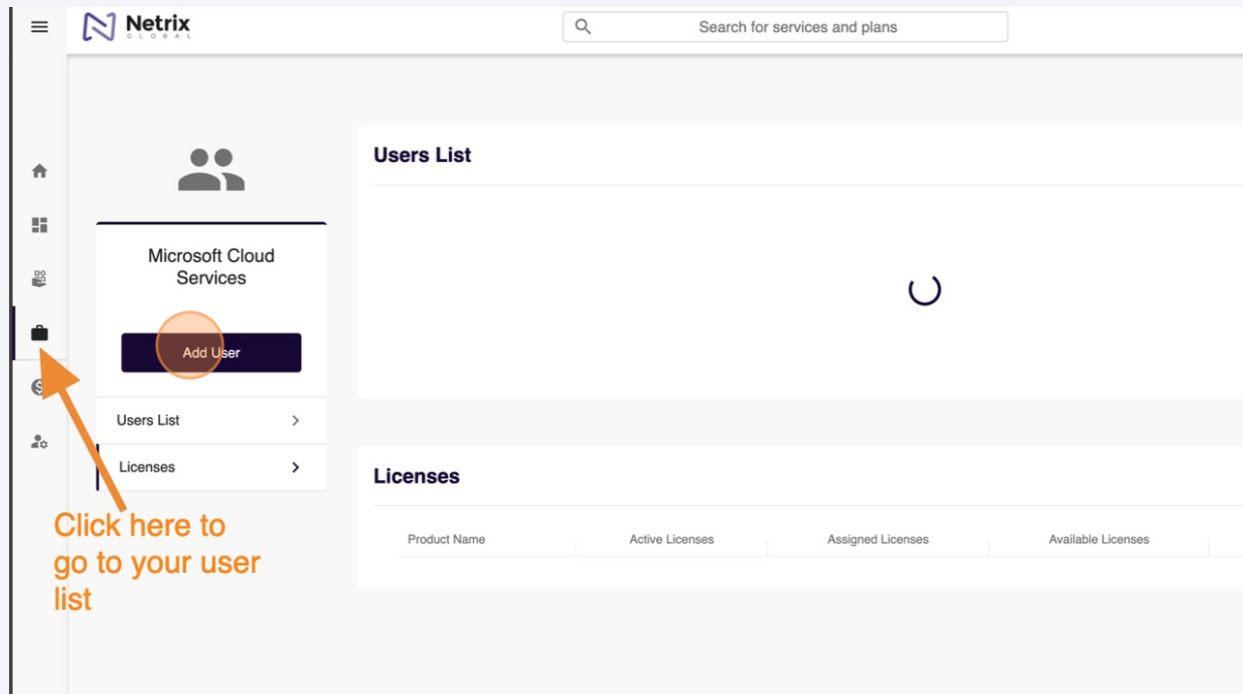
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How to assign a license to a new user

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Once the provisioning process has been completed, you will be able to assign the license to a specific user.

To do so, click on the User List icon on the left hand side of the screen. This will allow you to see all the users that have licenses assigned and the number of available licenses. To add a new user, select the "Add User" button.



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From here you will be able to enter the new user information, display name, and also setup their initial login password. Once this has been completed, the user will be able to log into the Microsoft suite and begin using their email etc.

The screenshot shows a web browser window with the URL <https://csp.netrixllc.com/my-workspace/?tab=userdirectory&systemid=617&accountid=74884#view-licenses-statistics-list>. The page displays the Netrix logo and a sidebar with options like 'Microsoft Cloud Services', 'Add User', 'Users List', and 'Licenses'. A modal form for creating a new user is open. The form includes fields for 'First Name', 'Last Name', 'Display Name*', a masked email address, and a 'Locations*' dropdown set to 'United States of America (US)'. The 'Password' section has two radio buttons: 'Auto-generate Password' (selected) and 'Let Me Create Password'. Below this are 'Password' and 'Confirm Password' fields, both masked. There is a checkbox for 'Send Password To Email Upon Completion*' with an 'Email' field below it. At the bottom of the form is a checkbox for 'Force User to Change Password Upon First Sign In', which is highlighted with an orange box. The form has 'Close' and 'Next' buttons at the bottom right.



For security purposes, it is recommended that you select the option to force the user to setup a new password when they sign in.



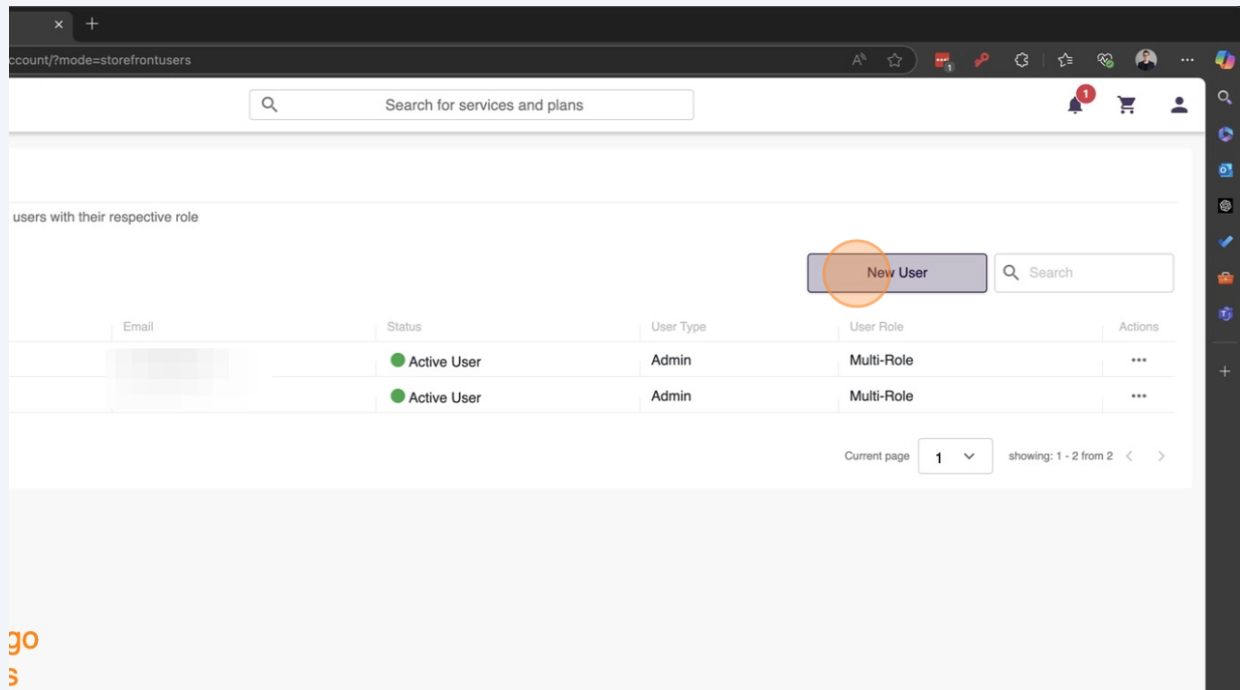
If you grant someone access to the CSP portal, that person will be able to purchase new licenses. You're responsible for all licenses purchased, so carefully consider whom you give access to.

How to add a user to the CSP portal

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In the portal user screen, you will be able to manage the users that have access to the CSP portal, add a new user, and manage the permissions of each portal user.

To add a new user, select the "New User" button on the upper right-hand side of the screen.



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Enter the portal user information, including the permission settings and role type

The screenshot shows the 'New User' form in the Netrix CSP Portal. The form is divided into three main sections: 'User Information', 'Localization Options', and 'User Permission Settings'. In the 'User Information' section, the 'First Name' is 'Han' and the 'Last Name' is 'Solo'. The 'Email' field is empty. In the 'Localization Options' section, the 'Language' is set to 'English' and the 'Date Format' is 'dd/mm/yyyy'. In the 'User Permission Settings' section, the 'User Type' is set to 'User' (indicated by a radio button). Below this, there are four roles listed: 'Billing Agent', 'Subscriptions Manager', 'Buyer', and 'Cloud Administrator'. Each role has a corresponding toggle switch on the right, all of which are currently turned on. A 'Create' button is located at the bottom right of the form.

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You can see the different role types and what those roles allow a user to do within the portal

This screenshot shows the same 'New User' form as the previous one, but with additional annotations. An orange box highlights the 'User Role' section, which lists the roles: 'Billing Agent', 'Subscriptions Manager', 'Buyer', and 'Cloud Administrator'. An orange arrow points to the dropdown arrow next to the 'Billing Agent' role, with the text 'Selecting this drop-down will give you details on each role type'. The 'Create' button at the bottom right is also circled in orange. The form is otherwise identical to the previous screenshot.