

Create a Customer in MachPanel

Summary

This article describes in detail about creating a new customer in MachPanel

Applies To

MachPanel All versions.

Pre-requisites

MachPanel Control Server has been installed, if not then follow below KB article:

<http://kb.machsol.com/Knowledgebase/Article/50261>

MachPanel Remote Server has been installed, if not then follow below KB article:

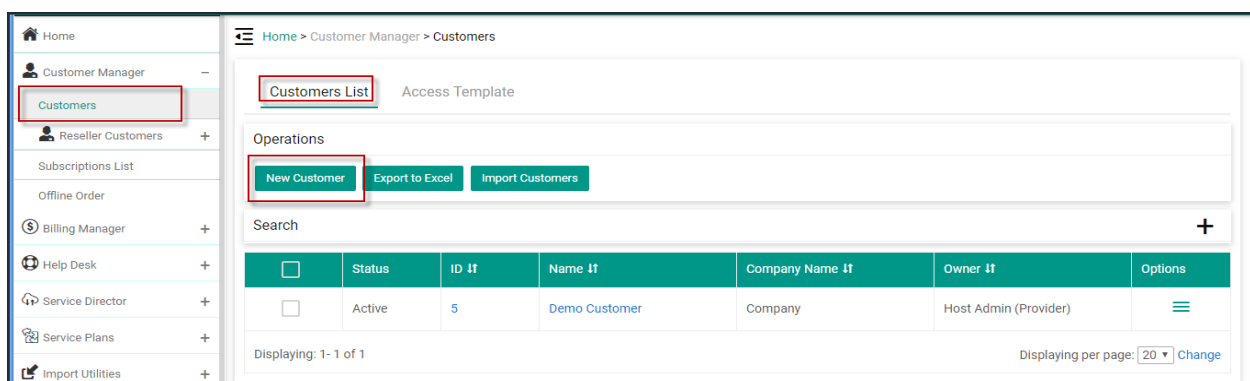
<http://kb.machsol.com/Knowledgebase/Article/50262>

Also make sure that MachPanel Control Server and MachPanel Remote Server should be on the same build and that MachPanel Provisioning Service is running on both servers

More Information

Open MachPanel Control Panel Website (You can do it by opening MachPanel Control Server Configuration Studio and then navigating to **Configure > Control Panel Website**, and then clicking on the URL in it). Log in with the provider credentials

Navigate to **Home » Customer Manager » Customers** and then click on **New Customer**.



The screenshot displays the MachPanel Customer Manager interface. On the left, a sidebar menu shows 'Home', 'Customer Manager', 'Customers' (highlighted with a red box), 'Reseller Customers', 'Subscriptions List', 'Offline Order', 'Billing Manager', 'Help Desk', 'Service Director', 'Service Plans', and 'Import Utilities'. The main content area is titled 'Home > Customer Manager > Customers'. It features a 'Customers List' tab and an 'Access Template' link. Below this is an 'Operations' section with three buttons: 'New Customer' (highlighted with a red box), 'Export to Excel', and 'Import Customers'. A search bar is located below the operations section. The main table displays a list of customers with columns: Status, ID, Name, Company Name, Owner, and Options. The first row shows a customer with Status 'Active', ID '5', Name 'Demo Customer', Company Name 'Company', and Owner 'Host Admin (Provider)'. At the bottom, it indicates 'Displaying: 1- 1 of 1' and 'Displaying per page: 20 Change'.

Status	ID	Name	Company Name	Owner	Options
Active	5	Demo Customer	Company	Host Admin (Provider)	

Create a Customer in MachPanel

On the next screen click on Select to select the appropriate provider for this new customer

The screenshot shows the 'Subscribe Service' form in the MachPanel interface. The breadcrumb trail at the top reads 'Home > Customer Manager > Offline Order'. The left sidebar contains a search bar and a menu with 'Home', 'Customer Manager' (expanded), 'Customers', 'Reseller Customers', and 'Subscriptions List'. The main form area has two dropdown menus: 'Create as:' with 'End Customer' selected, and 'Customer Ownership:' with 'Select Owner' selected.

- Select Host Admin (Provider) if you want to create a new customer under the direct customer for provider.
- Select the Appropriate Reseller customer if you want to create this new customer under the reseller customer.

The screenshot shows a search results modal. At the top is a search bar with the text 'Search' and a minus icon. Below it is a table with columns: ID, Name, Email, and Company Name. The first row shows ID '1', Name 'Host Admin (Provider)', Email 'Provider@machsolsales.com', and Company Name 'Host Admin (Provider)'. Below the table is a status bar that says 'Displaying: 1- 1 of 1' and 'Displaying per page: 20 Change'. A 'Close' button is at the bottom left.

ID	Name	Email	Company Name
1	Host Admin (Provider)	Provider@machsolsales.com	Host Admin (Provider)

After selecting the provider or reseller, on the next page all the required information should be filled out for new customer as shown below.

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*Phone:	(1) 123456789
Is Taxable	<input checked="" type="checkbox"/>
Mobile	
Fax	
Alternate email	
Currency:	US Dollar ▼
Locale:	German (Switzerland) ▼
Language:	English ▼
Time zone:	(UTC-08:00) Pacific Time (US & Canada) ▼
*Access Template:	Default Client Template ▲

Managed By Sub Reseller:	None ▼
<div><div>Add Customer</div><div>Add and Subscribe To Service</div></div>	

After completing all the requirements click on **Add Customer** to complete the process for creating a new customer or click **Add and Subscribe to Service** as per following link:

Create a Customer in MachPanel

<http://kb.machsol.com/Knowledgebase/Article/50275>

To create customers in bulk (Import Customers) using CSV file. Please review details on KB link below:

<https://kb.machsol.com/Knowledgebase/50297/Import-customers-or-Bulk-Customer-Creation>

Keywords

Customer, Adding a customer, Create Customer, New Customer.

MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/50272/Create-a-Customer-in-MachPanel>