

# 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**.

<input type="checkbox"/>	Status	ID	Name	Company Name	Owner	Options
<input type="checkbox"/>	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

---Search in menu---

Home > Customer Manager > Offline Order

Subscribe Service

Create as: End Customer

Customer Ownership: Select Owner

- 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.

Search

ID  
1

Name Email Company Name

Search Clear

ID ↑↓	Name ↑↓	Email Address	Owner ↑↓	Company Name ↑↓
1	Host Admin (Provider)	Provider@machsolsales.com	Host Admin (Provider)	Host Admin (Provider)

Displaying: 1- 1 of 1

Displaying per page: 20 Change

Close

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 ▼
<a href="#">Add Customer</a>	<a href="#">Add and Subscribe To Service</a>

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>