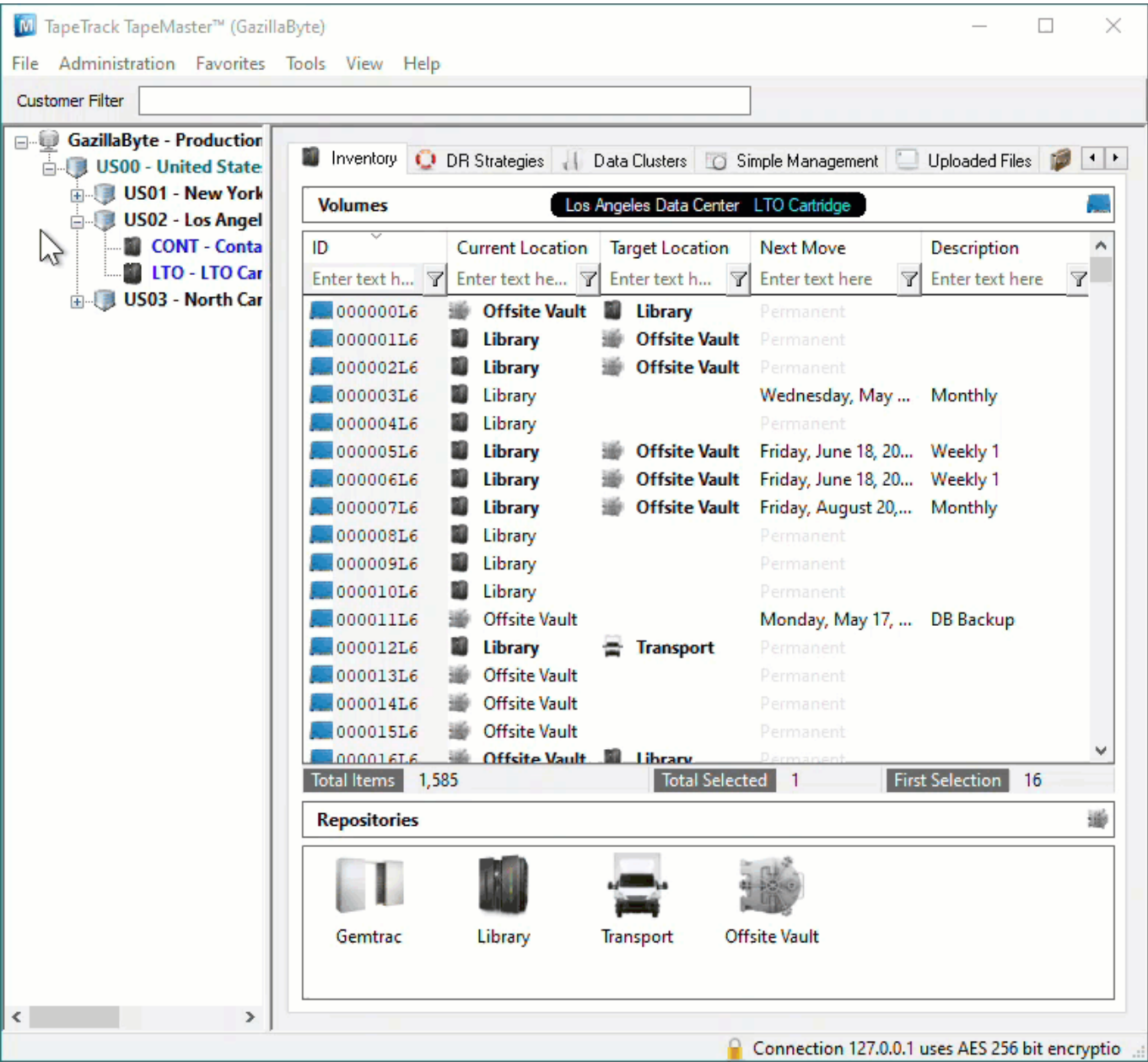


# Adding and Maintaining Customers

A [Customer](#) is an owner of [Volumes](#). This page details how to Add or Delete [Customers](#).

## Add Customer

To add a [Customer](#), right-click on the [Server Node](#) of the [Customer Tree](#) and select Add Customer.



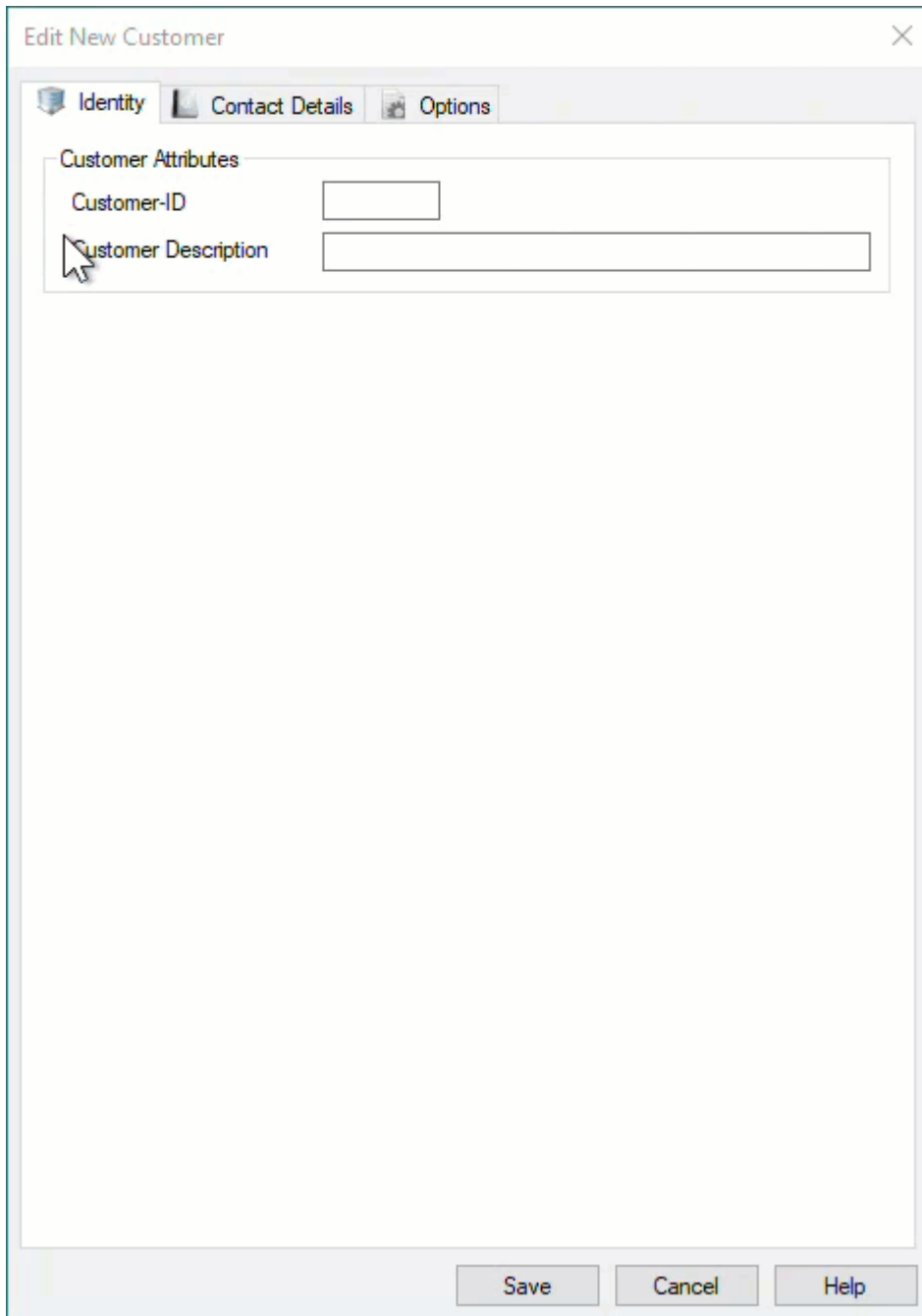
This will launch the Edit New Customer window.

## Identity

The first tab on the Add Customer window is the Identity tab.

Enter the [Customer-ID](#) and a [Customer Description](#).

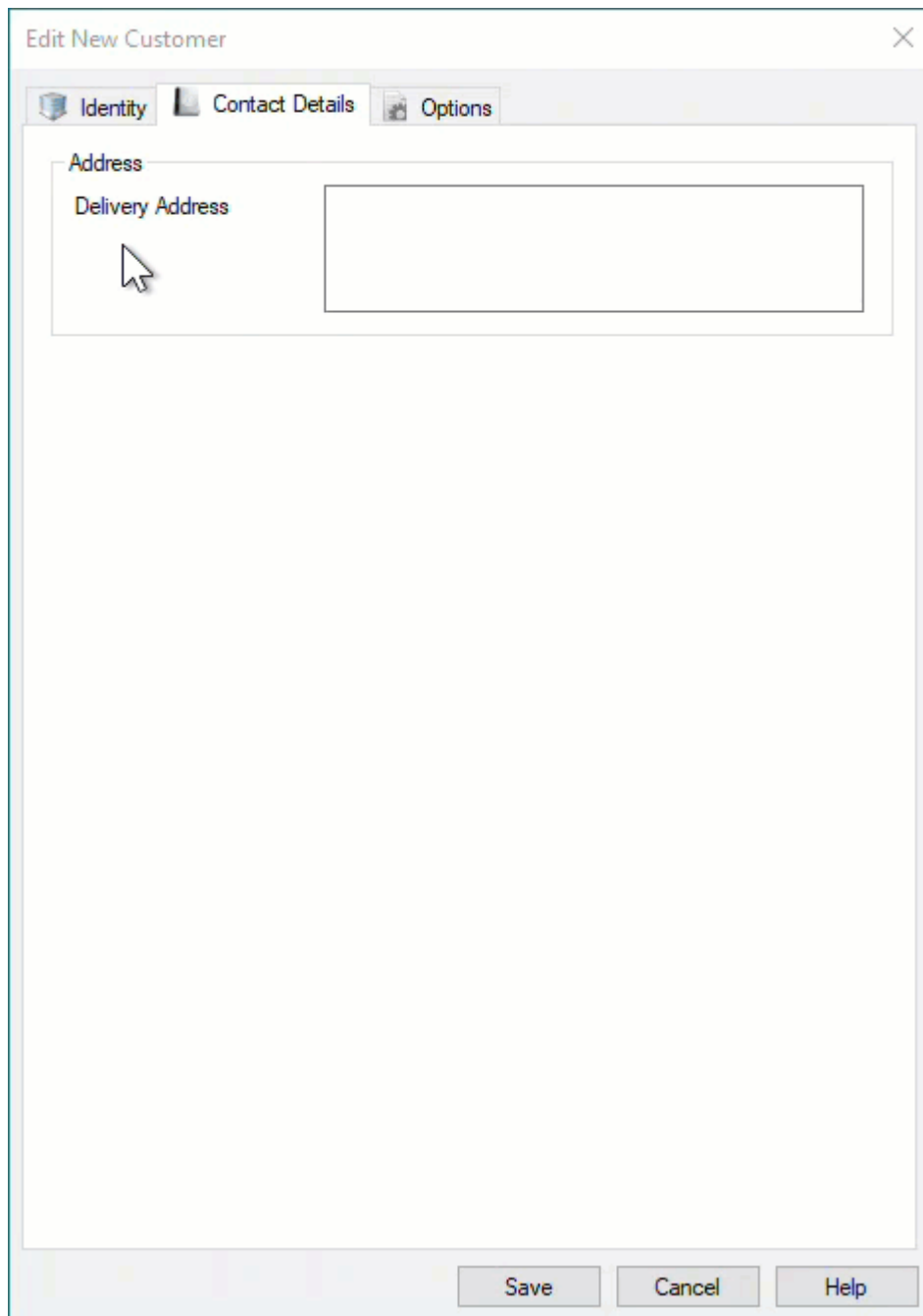
You can add up to four alphanumeric characters as the [Customer-ID](#) and up to forty alphanumeric characters for the [Customer Description](#).



The screenshot shows a software window titled "Edit New Customer" with a close button (X) in the top right corner. Below the title bar are three tabs: "Identity" (selected), "Contact Details", and "Options". The "Identity" tab contains a section titled "Customer Attributes" which includes two input fields: "Customer-ID" and "Customer Description". A mouse cursor is pointing at the "Customer Description" field. At the bottom of the window are three buttons: "Save", "Cancel", and "Help".

## Contact Details

Enter the contact details for the [Customer](#) in the Contact Details tab.



The screenshot shows a software window titled "Edit New Customer". It features a tabbed interface with three tabs: "Identity", "Contact Details", and "Options". The "Identity" tab is currently selected. Within this tab, there is a section labeled "Address" which contains a sub-label "Delivery Address" and a large, empty rectangular text input field. A mouse cursor is positioned over the text input field. At the bottom of the window, there are three buttons: "Save", "Cancel", and "Help".

## Options

The Options tab can be utilized to set specific details about a [Customer](#). These details are accessible at any point by right-clicking the [Customer](#), on the [Customer Tree](#) and selecting Properties.

Edit New Customer

Identity Contact Details Options

|                              |                |
|------------------------------|----------------|
| Hide Customer                | False          |
| Disallow Customer Duplicates | False          |
| Disallow Global Duplicates   | False          |
| Volume Lock                  | False          |
| Hide No Children             | False          |
| Allowable Media-ID Filter    |                |
| Maximum number of Media-IDs  | 0              |
| Holiday Group                |                |
| Customer Category            | 0              |
| Parent Customer              | <No Selection> |
| Account Number               | 0              |
| Long Barcode Attribute       | <Not Selected> |

Save Cancel Help

- **Hide Customer** when set to true removes the [Customer](#) from view in the [Customer Tree](#).
- **Disallow Customer Duplicates** stops the duplication of [Volume-ID's](#) across the [Customer Media Types](#).
- **Disallow Global Duplicates** stops the duplication of [Volume-ID's](#) across all [Customers](#).
- **Volume Lock** stops any [Volumes](#) moving within this [Customer](#).
- **Hide No Children** stops the display of this [Customer](#) unless showing children or has [Media](#) defined.
- **Allowable Media-ID Filter**, if set, restricts the allowable [Volume-ID](#) formats for this [Customer](#).
- **Maximum number of Media-ID's** that can be created for this [Customer-ID](#). 0=No limit.
- **Holiday Group** assigns a group for [Simple Management](#) calculations of holidays to avoid.
- **Customer Category** is an arbitrary number that can be set to group [Customers](#) for batch processing.
- **Parent Customer** displays the current [Customer](#) as a child under the selected [Customer](#).
- **Account Number** Iron Mountain (or other third-party) account number.
- **Customer Tree Type** changes the Customer Tree view between Media Type (default) and Featured Attribute.

- **Long Barcode Attribute** adds un-hashed long Barcode to selected Attribute.

Once you click Save, TapeMaster will open a window asking if you'd like to add some **Media** to this **Customer**.



If yes is selected, then TapeMaster will display the Add **Media Types** for new Customer window. Create relevant **Media Type** by changing the Create option from False to True. Other fields, **Media-ID** and **Description** may be edited or customized to your required values.

The Media Description may be edited at a later point but the Media-ID is permanent.

**Add Media Types for new Customer**

You can now add one or more Media Types (by enabling the "Create" property).

A Media Type is a collection of media, usually group by technology type.

While it is possible to add a media type for each media type generation (i.e. LTO1, LTO2 etc), it is recommended that you group all technology generations together (i.e. LTO).

**US04**

|               |             |                    |
|---------------|-------------|--------------------|
| Media Type[1] | ID          | LTO                |
|               | Description | LTO Cartridge      |
|               | Create      | False              |
| Media Type[2] | ID          | DLT                |
|               | Description | DLT Cartridge      |
|               | Create      | False              |
| Media Type[3] | ID          | 359X               |
|               | Description | IBM 359x Cartridge |
|               | Create      | False              |
| Media Type[4] | ID          | T10K               |
|               | Description | T1000 Cartridge    |
|               | Create      | False              |

**OK** **Cancel**

Click OK to continue.

The next prompt will be to add any required [Repositories](#). Create relevant [Repositories](#) by changing the Create option from `False` to `True`. Other fields, [Repository-ID](#) and [Description](#), may be edited or customized your required values.

Add Repositories for new Media Type

You can now add one or more Repositories (by enabling the "Create" property).

A Repository is a general location a tape volume might reside in (i.e. Offsite, Legal Hold).

It is completely up to you how granular you define your Repositories. Some users have one to represent all of their onsite tape libraries, others have one for each tape library.

US04

CD Disk

Repository [1]

|                 |               |
|-----------------|---------------|
| ID              | OFFS          |
| Description     | Offsite Vault |
| Type            | Vault         |
| Next Repository | LIBR          |
| Offsite         | True          |
| Initial         | False         |
| Create          | False         |

Repository [2]

|                 |         |
|-----------------|---------|
| ID              | LIBR    |
| Description     | Library |
| Type            | Library |
| Next Repository | OFFS    |
| Offsite         | False   |
| Initial         | True    |
| Create          | False   |

Repository [3]

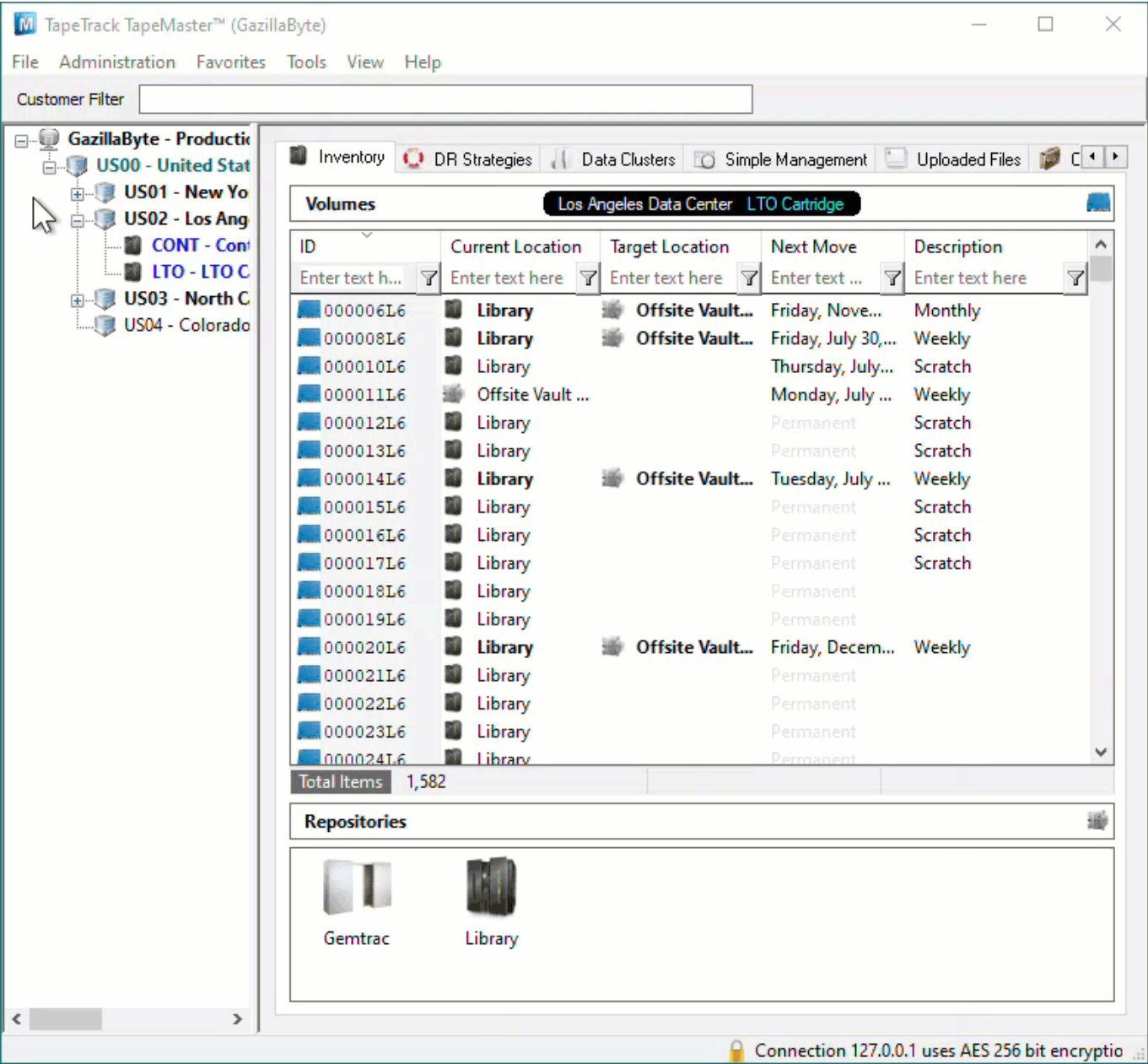
|             |            |
|-------------|------------|
| ID          | HOLD       |
| Description | Legal Hold |
| Type        | Legal Hold |

OK

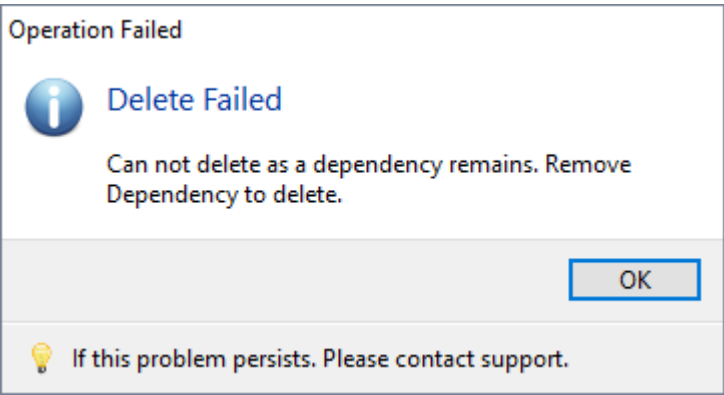
Cancel

## Delete Customer

To delete a [Customer](#), right-click on the [Customer](#) in the [Customer Tree](#) and select Delete Customer.



A **Customer** may only be deleted when it does not contain **Media Types**, **Repositories**, or **Volumes**.



If you receive this error, for this Customer, delete all **Volumes**, then all **Repositories** and all **Media types** before deleting a **Customer**.

From:  
<https://rtfm.tapetrack.com/> - **TapeTrack Documentation**

Permanent link:  
<https://rtfm.tapetrack.com/master/customer>

Last update: **2025/09/19 02:27**

