

# Adding and Maintaining Customers

A Customer is an owner of Volumes. This page details how to Add or Delete Customers.

## Add Customer

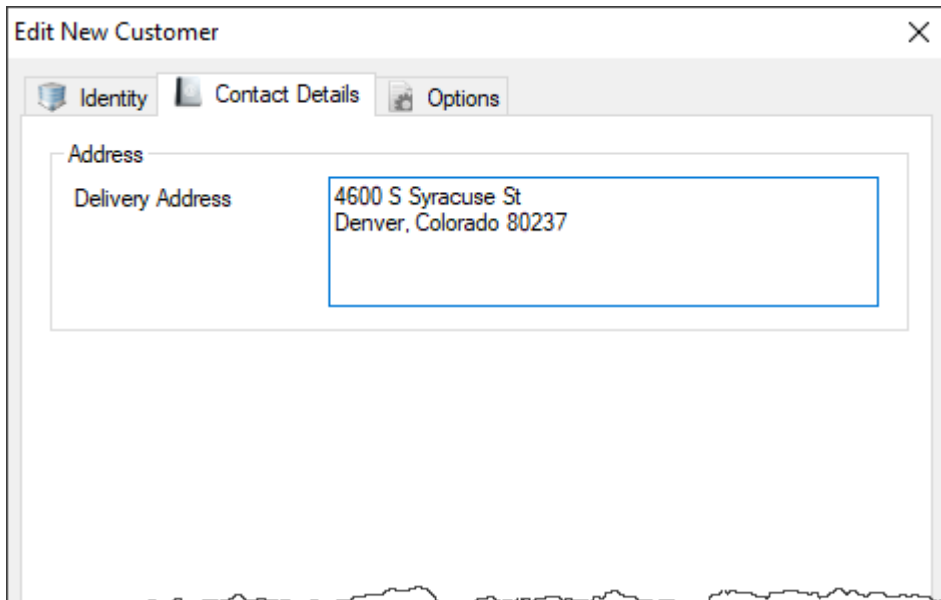
To add a Customer, right-click on the [Server Node](#) of the [Customer Tree](#) and select "Add Customer".



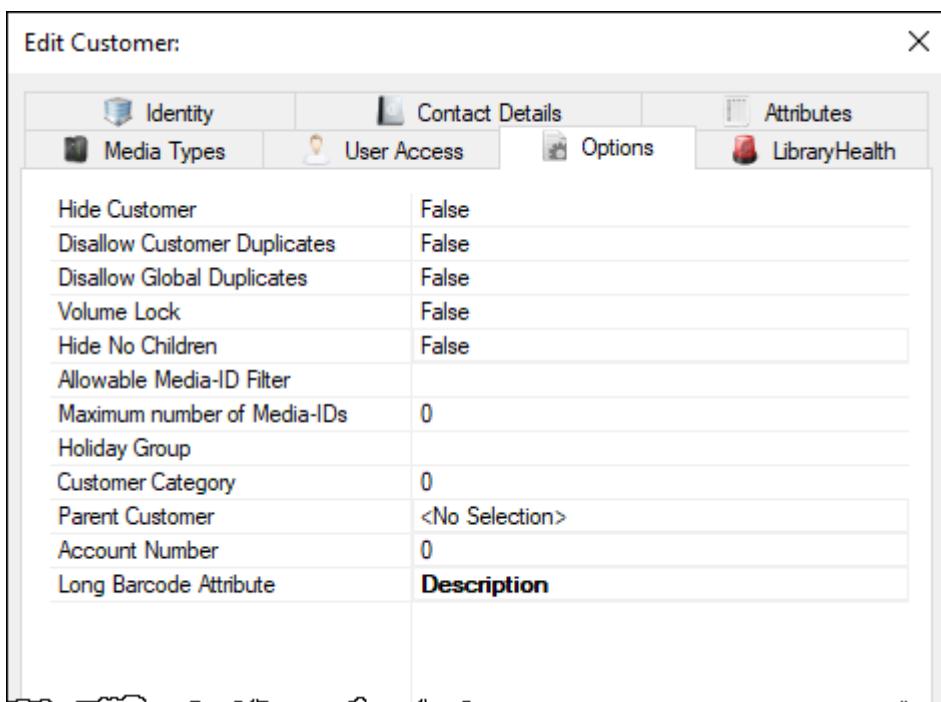
This will launch a modified version of the Customer Properties Window. The first tab on the Add Customer window is the Identity tab. The Identity tab requires the input of a Customer-ID and a Customer Description. You can add up to four characters as the Customer-ID and up to forty characters for the Customer Description.



The Contact Details tab provides a location for contact details for that customer.



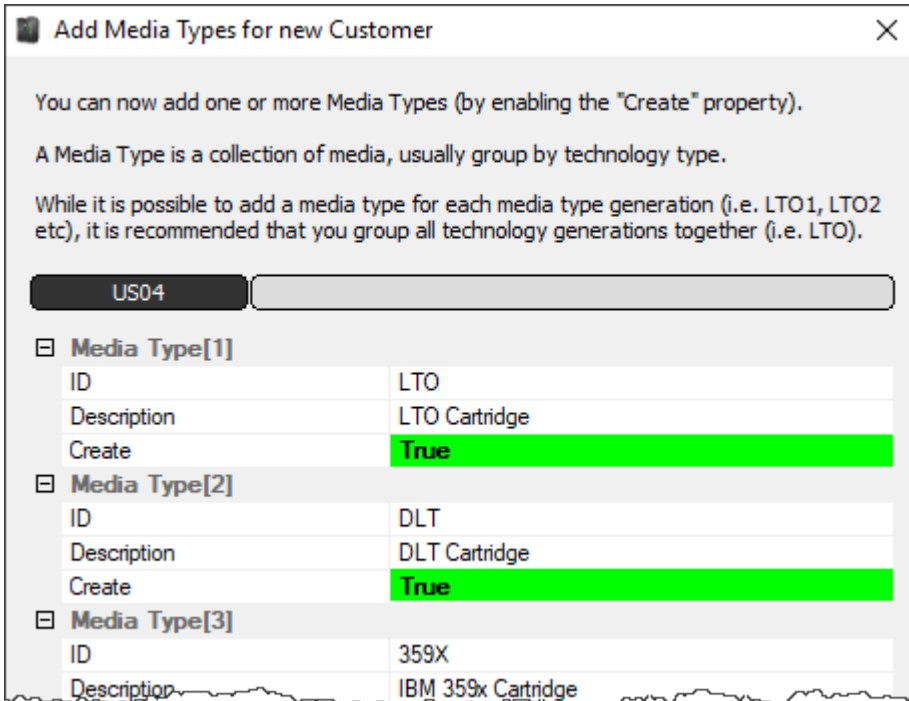
The Options tab can be utilized to set specific details about a customer. These details are accessible at any point by right-clicking the customer and selecting Properties.



- **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** 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.

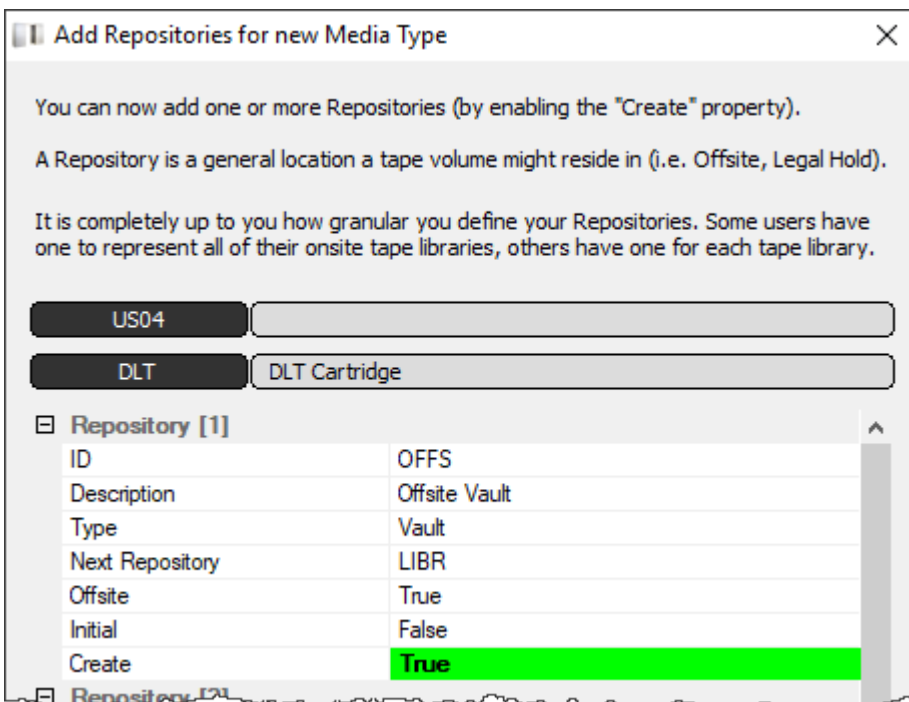
- **Account Number** Iron Mountain (or other 3rd party) account number.

Once you click “Save”, TapeMaster will open a window asking if you'd like to add some **media** to this customer. If selected yes, 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 may be edited to customize your values.



Click OK to continue.

The next prompt will be to add the relevant **repositories**. Create relevant **repositories** by changing the Create option from False to True. Other fields may be edited to customize your values.



# 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, delete all [volumes](#), then all [repositories](#) and all [media types](#) before deleting [customer](#).

You can also delete customers (without the need to remove [volumes](#), [repositories](#) and [media types](#) first) by using the Customer Delete plugin. From the menu select Tools → Plugins and then Customer Deletion Utility.

Check each [customer](#) you wish to remove and click Delete Selected and Yes to the warning popup. Exit out of the plugins window and press F5 in the [customer](#) tree to refresh information.

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