

Adding and Maintaining Customers

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

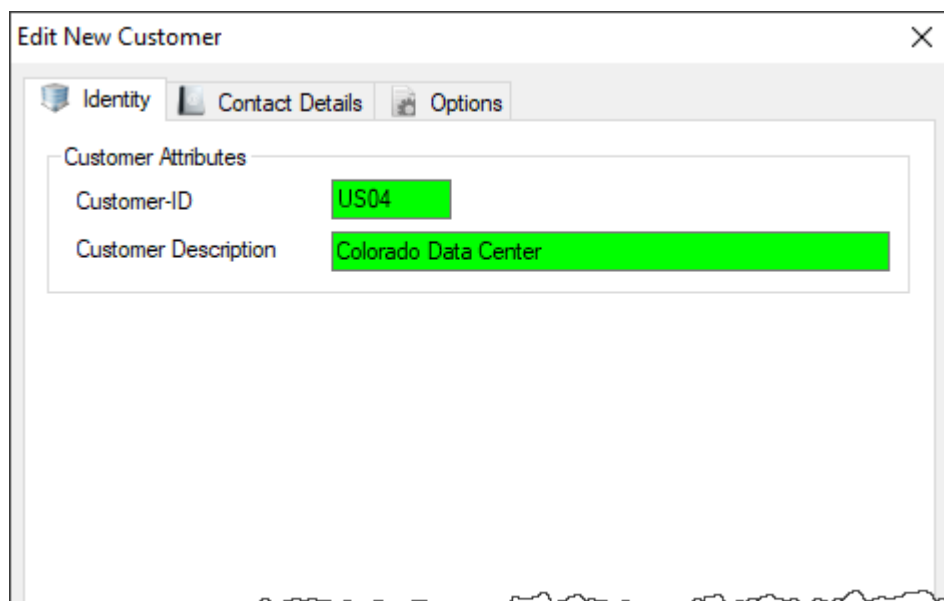
Add Customer

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 alphanumeric characters as the Customer-ID and up to forty alphanumeric characters for the Customer Description.



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



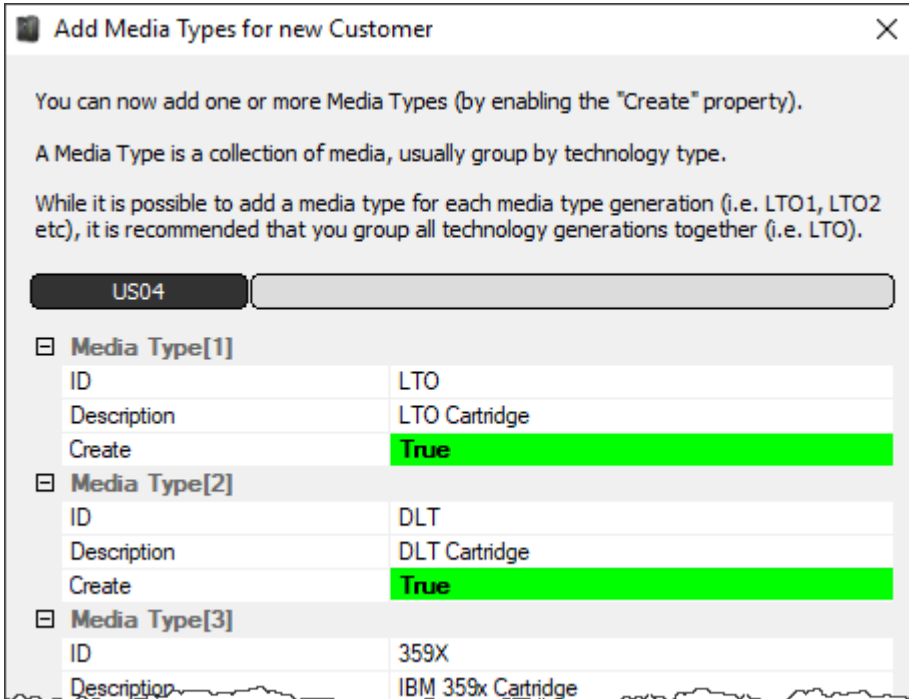
The Options tab can be utilized to set specific details about a customer. These details are accessible at any point by right-clicking the customer and selecting Properties.



- **Hide Customer** when set to true removes the customer from view in the master:customer_tree[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 master:customer[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.

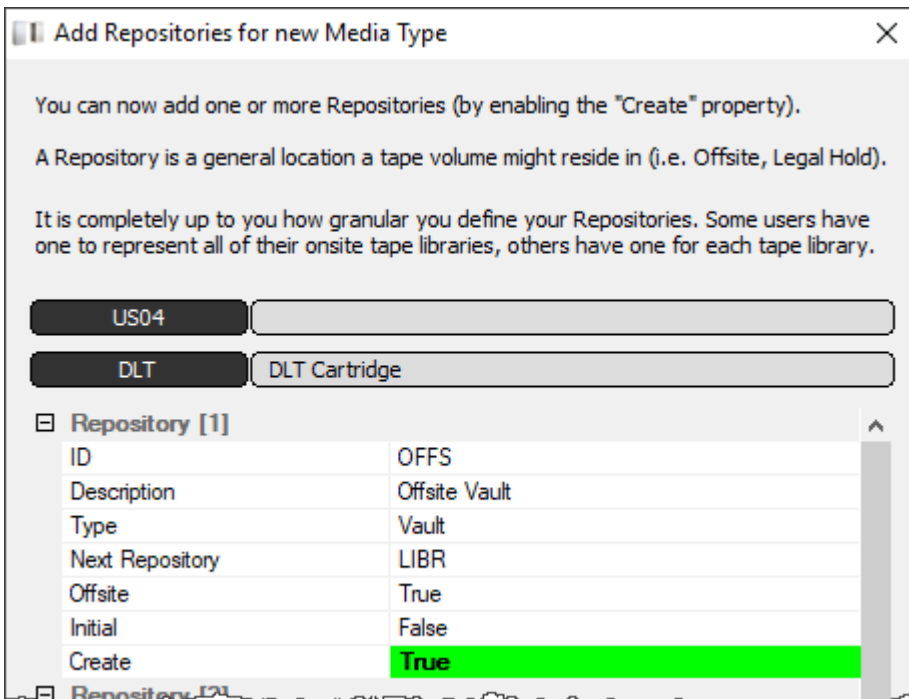
- **Parent Customer** displays the current customer as a child under the selected [customer](#).
- **Account Number** Iron Mountain (or other third-party) account number.

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.

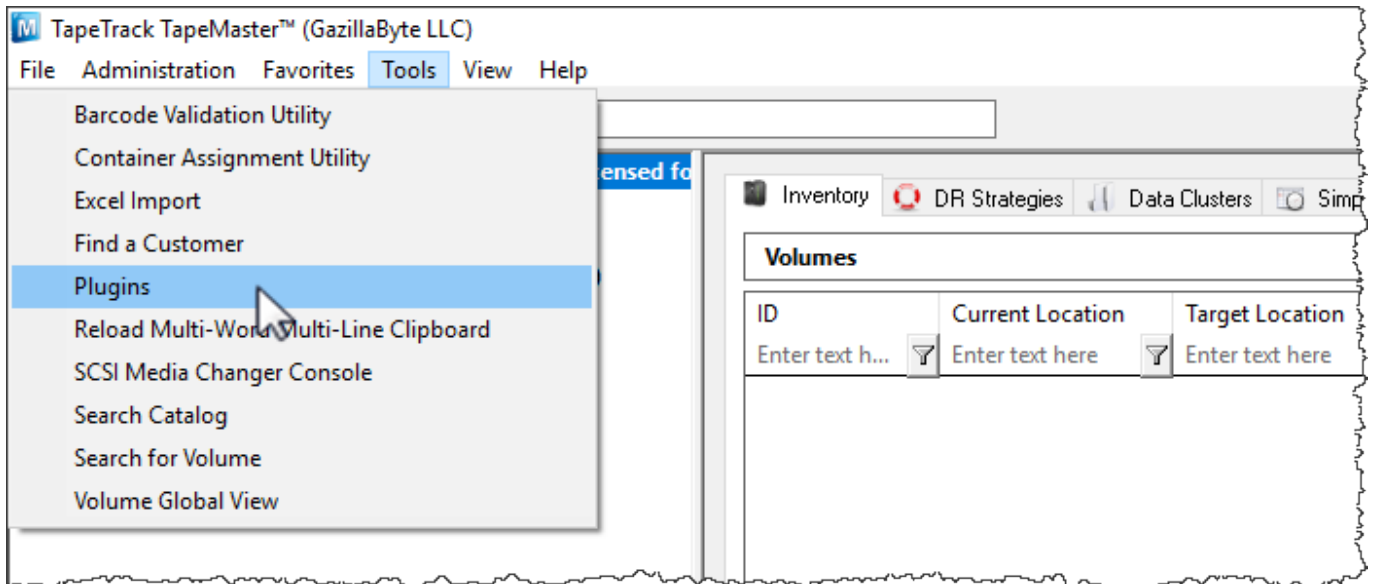


A customer may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).

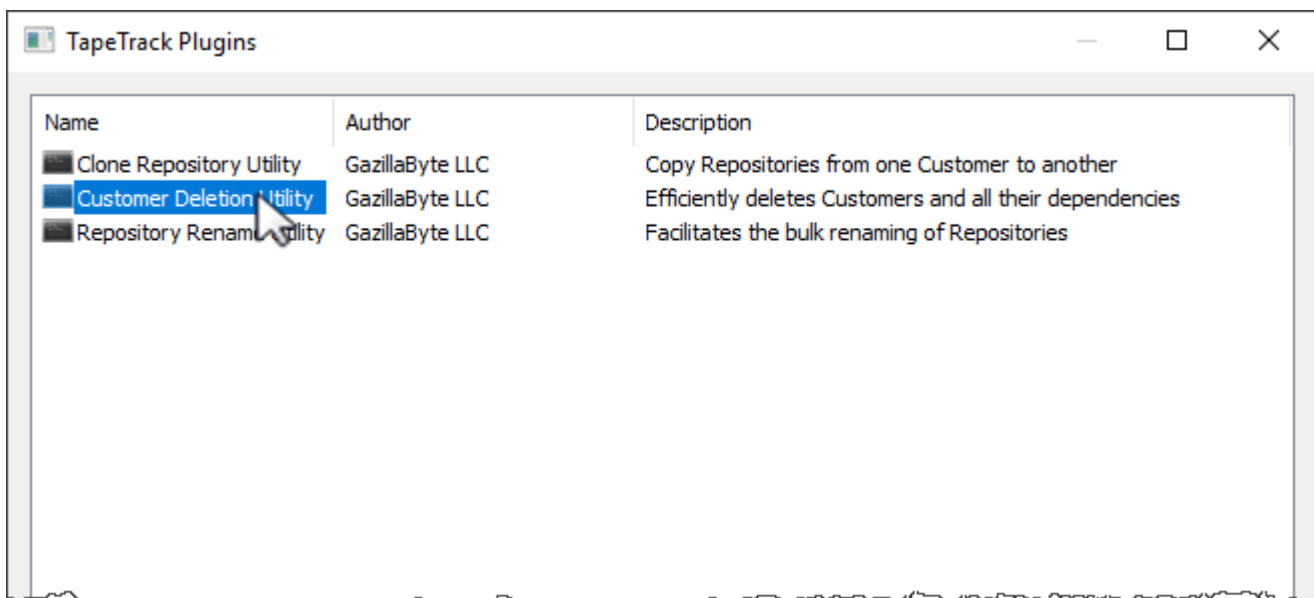


If you receive this error, delete all [volumes](#), then all [repositories](#) and all [media types](#) before deleting [customer](#).

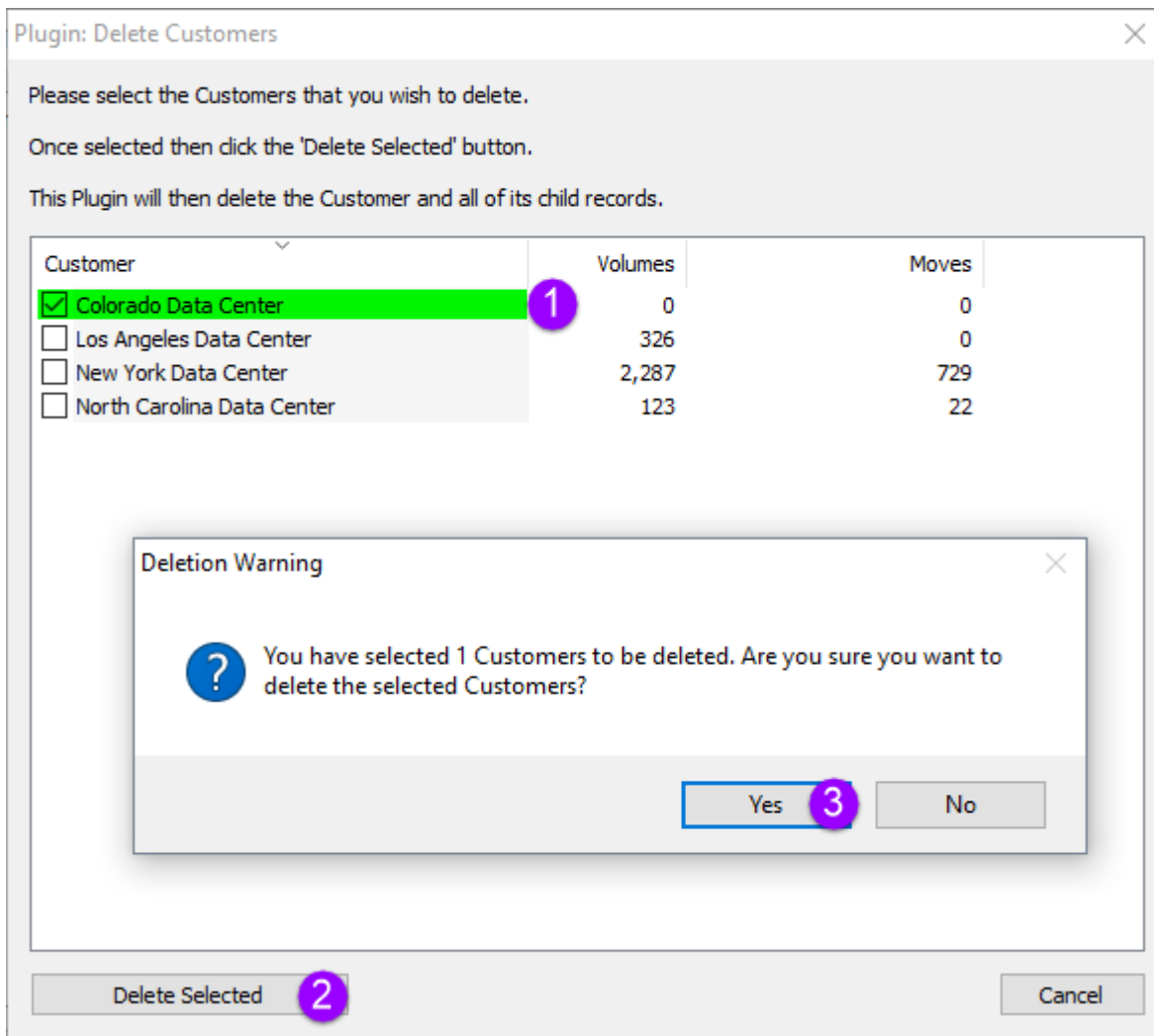
You can also delete customers (without the need to remove [volumes](#), [repositories](#) and [media types](#) first) by using the [Customer Delete](#) plugin. From the menu select Tools → Plugins



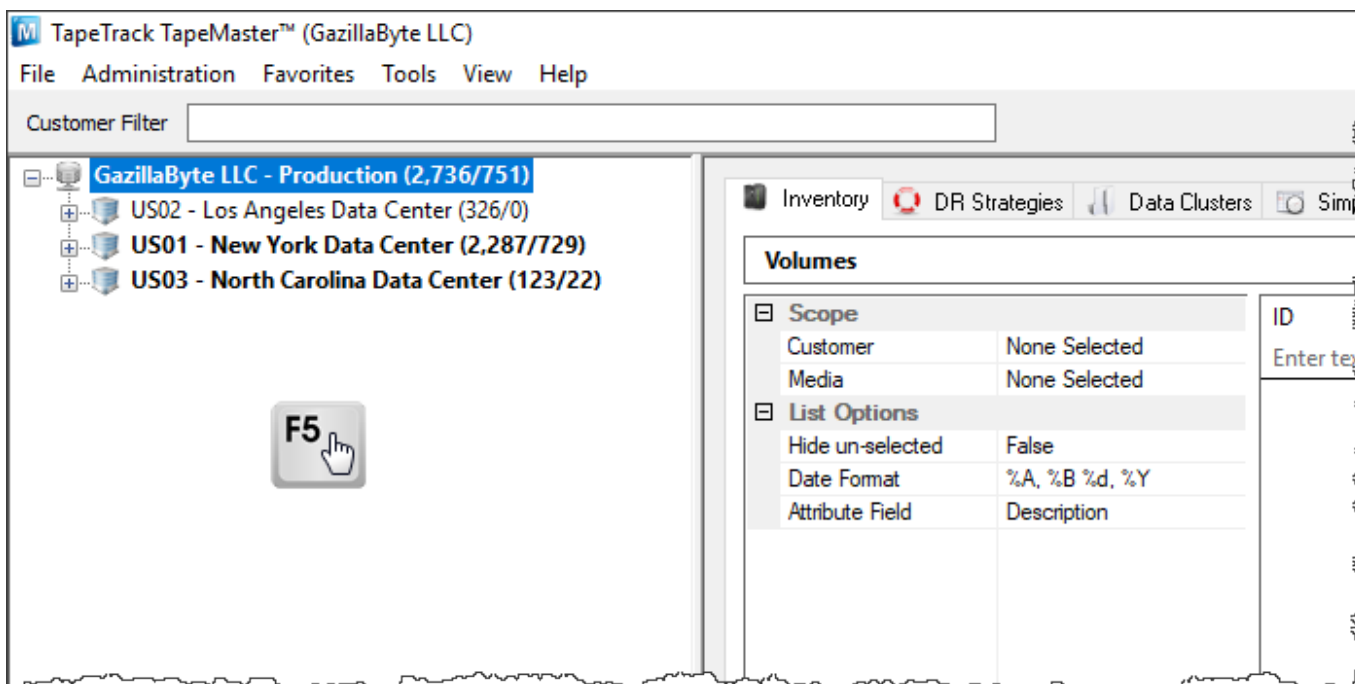
Select the Customer Deletion Utility by double-clicking.



Check each **customer** (1) you wish to remove and click Delete Selected (2) and Yes (3) to the warning popup.



Exit out of the plugins windows using the X at the top right and press F5 in the [customer tree](#) to refresh information.



From:
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Last update: **2025/01/21 22:07**

