## **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.

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Customer Filter					( ,	
GazillaB Act U.C. Devolution (2.726(750))         Image: Constraint of the second sec						
			ID Enter text h	Current Location Enter text here	Target Location Enter text here	
~ ~~~~~~						

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.

Edit New Customer	$\times$
Identity Lontact Details 📄 Options	
Customer Attributes US04	
Customer Description Colorado Data Center	
	$\sim$

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

Edit New Customer		Х
🧊 Identity 📗 Contact I	Details 🙀 Options	
Address		
Delivery Address	4600 S Syracuse St Denver, Colorado 80237	
		~~~

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.

🔰 Identity	Contact Details Attributes
📓 Media Types 🛛 🙎 User	Access 👔 Options 🍓 LibraryHealth
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=""></no>
Account Number	0
Long Barcode Attribute	Description

- **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.

1	Add Media Types for new Custo	omer	×					
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							
Ξ	Media Type[1]							
	ID	LTO						
	Description	LTO Cartridge						
	Create	True						
Ξ	Media Type[2]							
	ID	DLT						
	Description	DLT Cartridge						
	Create	True						
Ξ	Media Type[3]							
	ID	359X						
~~~	Description	IBM 359x Cartridge	~~~,					

Click 0K 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.

	Add Repositories for new Media Type X							
Yo	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							
	DLT	DLT Cartridge						
Ξ	Repository [1]			^				
	ID	OFFS						
	Description	Offsite V	ault					
	Туре	Vault						
	Next Repository	LIBR						
	Offsite	True						
	Initial	False						
	Create	True						
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## **Delete Customer**

To delete a customer, right-click on the Customer in the Customer Tree and select Delete Customer.

M TapeTrack TapeMaster™ (GazillaByte LLC)							
File Administration Favori	ites Tools View Help				2 2 2		
Customer Filter					Ì		
GazillaByte LLC - Production (2,748/760)							
🗄 🗊 US04 - Colorado 🗗	🖥 🕼 US04 - Colorado Data Contor (12/10) 🖉 Inventory 🜔 DR Strategies 🔏 Data Clusters 🔟 Simp						
🗄 🧊 US02 - Los Angele	Add Media Type		Volumes		<u> </u>		
🖶 🍥 US01 - New Yorl	Create New Consignment		volumes				
🗄 🗐 US03 - North Cai	Delete Customer		ID	Current Location	Target Location		
	Add Journal Entry 😽		Enter text h 🍸	Enter text h 🍸	Enter text here		
	Properties		000001	Library	🐞 Offsite Vault [00		
	Search Attributes		000002	Library	🖉 Offsite Vault [۵۵		
	Sent Du		000003	📓 Library	Offsite Vault [00]		
	Sort By		000004	Library	🐲 Offsite Vault 👌		
	View Volume History		000005	Library	Ş		
h	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		-	Ilibran ~~~~	Jose Naultros		

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

Operatio	on Failed
0	Delete Failed
	Can not delete as a dependency remains. Remove Dependency to delete.
	OK
💡 lf	this problem persists. Please contact support.

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  $\rightarrow$  Plugins

Administration	Favorites	Tools	View	Help					
Barcode Validat	ion Utility								
Container Assig	nment Utility	/				_			
Excel Import					Inventory	$\mathbf{Q}$	DR Strategies  👭 [	Data	Clust
Find a Custome	r				Volumes				
Plugins	N								
Reload Multi-W	or Julti-Lin	ne Clipbo	ard		ID		Current Location		Targ
SCSI Media Cha	nger Consol	e			Enter text h	T	Enter text here	Y	Ente
Search Catalog									
Search for Volur	ne								
	/iew								

Select the Customer Deletion Utility by double-clicking.

	TapeTrack Plugins		_		×
	Name	Author	Description		
	Clone Repository Utility	GazillaByte LLC GazillaByte LLC	Copy Repositories from one Customer to another Efficiently deletes Customers and all their dependen	ncies	
	Repository Renam	GazillaByte LLC	Facilitates the bulk renaming of Repositories		
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Check each customer (1) you wish to remove and click Delete Selected (2) and Yes (3) to the warning popup.

Plugin: Delete Customers		×
Please select the Customers that you wish to delete.		
Once selected then click the 'Delete Selected' button.		
This Plugin will then delete the Customer and all of its	child records.	
Customer	Volumes	Moves
Colorado Data Center	1 0	0
Los Angeles Data Center	326	o
New York Data Center	2,287	729
North Carolina Data Center	123	22
Deletion Warning You have selected 1 Custo delete the selected Custon		× Are you sure you want to
		Yes 3 No
Delete Selected		Cancel

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

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File Administration Favorites Tools View Help				
Customer Filter				
GazillaByte LLC - Production (2,736/751)	10	Inventory Q DR	Strategies 🕌 Data Cluster	s 🔟 Simp
	V	olumes		
- *	Ξ	Scope		ID 3
		Customer	None Selected	Enter tex
		Media	None Selected	- Lincer teg
FE	Ξ	List Options		1
F5 <sub>,lm</sub>		Hide un-selected	False	1
		Date Format	%A, %B %d, %Y	
		Attribute Field	Description	
				3
				1
				Ì
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