

# 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.

### Identity

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.



### Contact Details

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



### 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 and selecting Properties.

| Property                     | Value              |
|------------------------------|--------------------|
| 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       | <b>Description</b> |

- **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.

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.



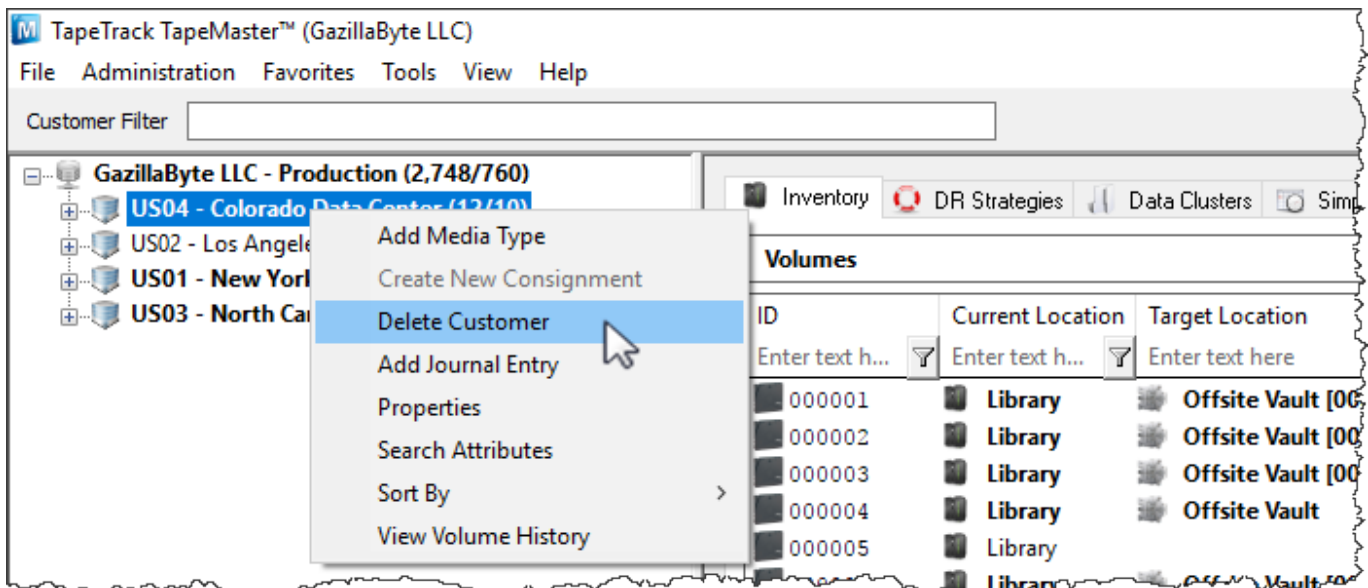
Click OK to continue.

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.

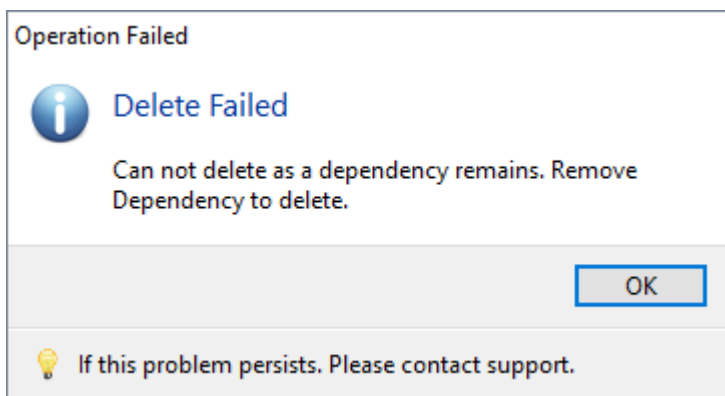


## Delete Customer

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

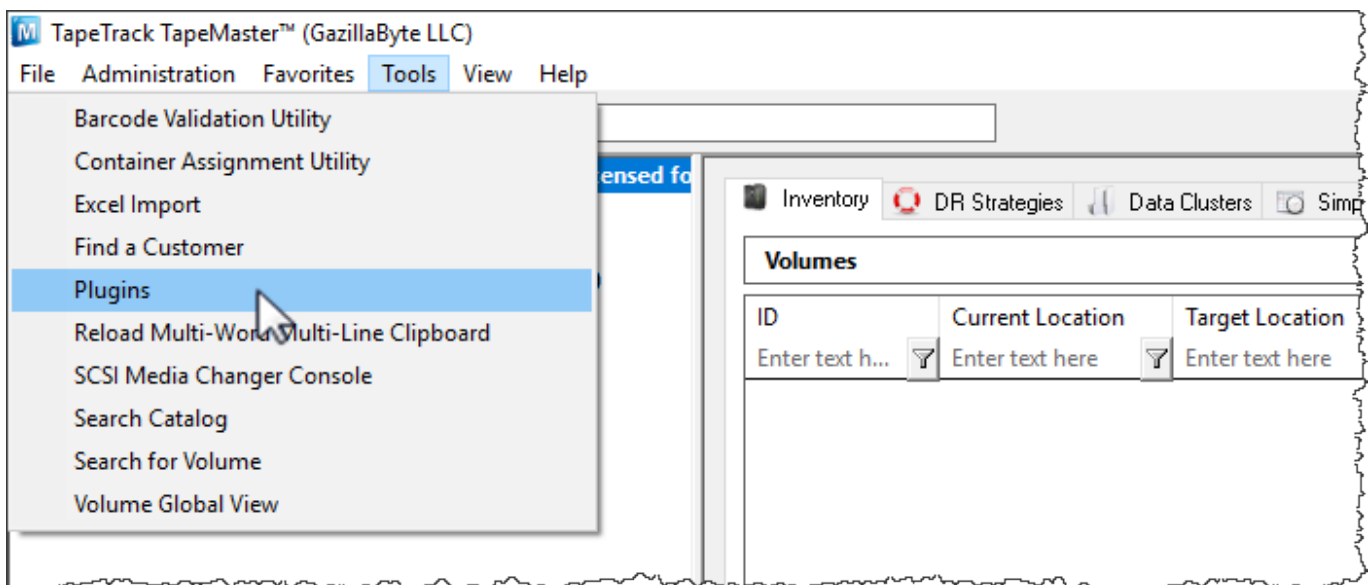


A customer may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).



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](#)



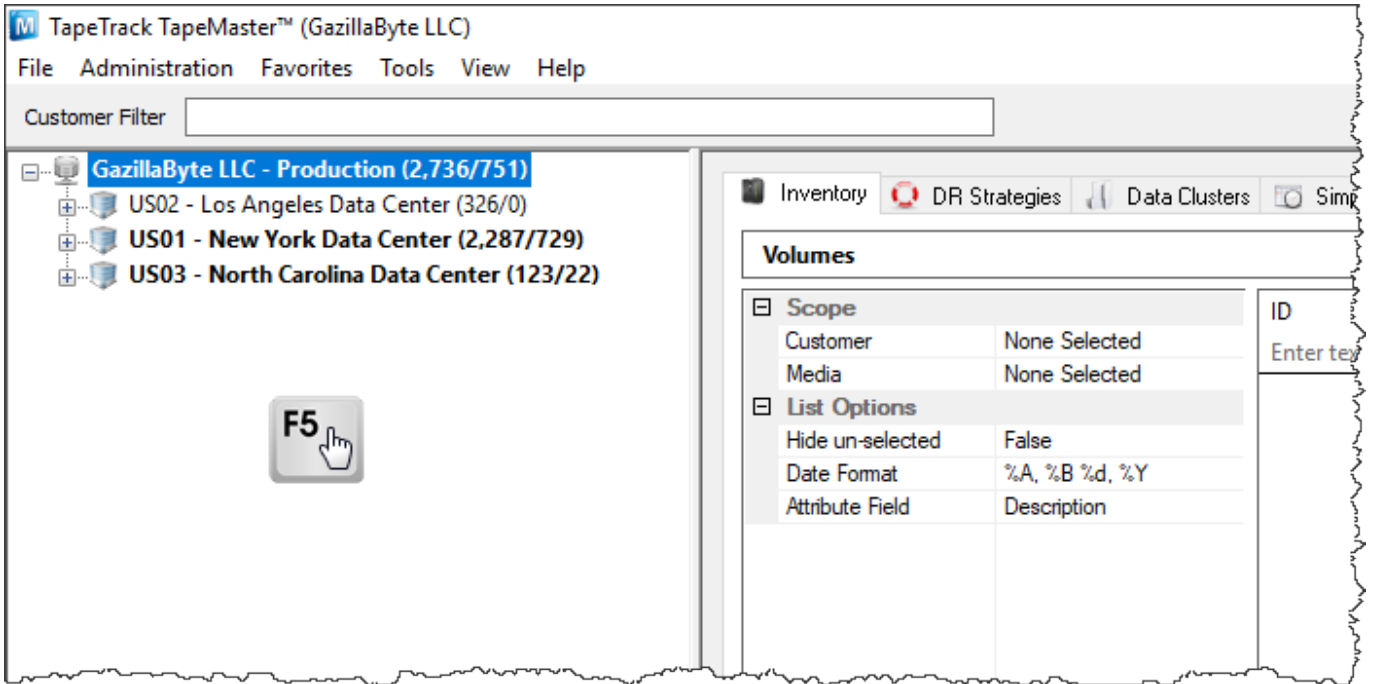
Select the [Customer Deletion Utility](#) by double-clicking.



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.



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