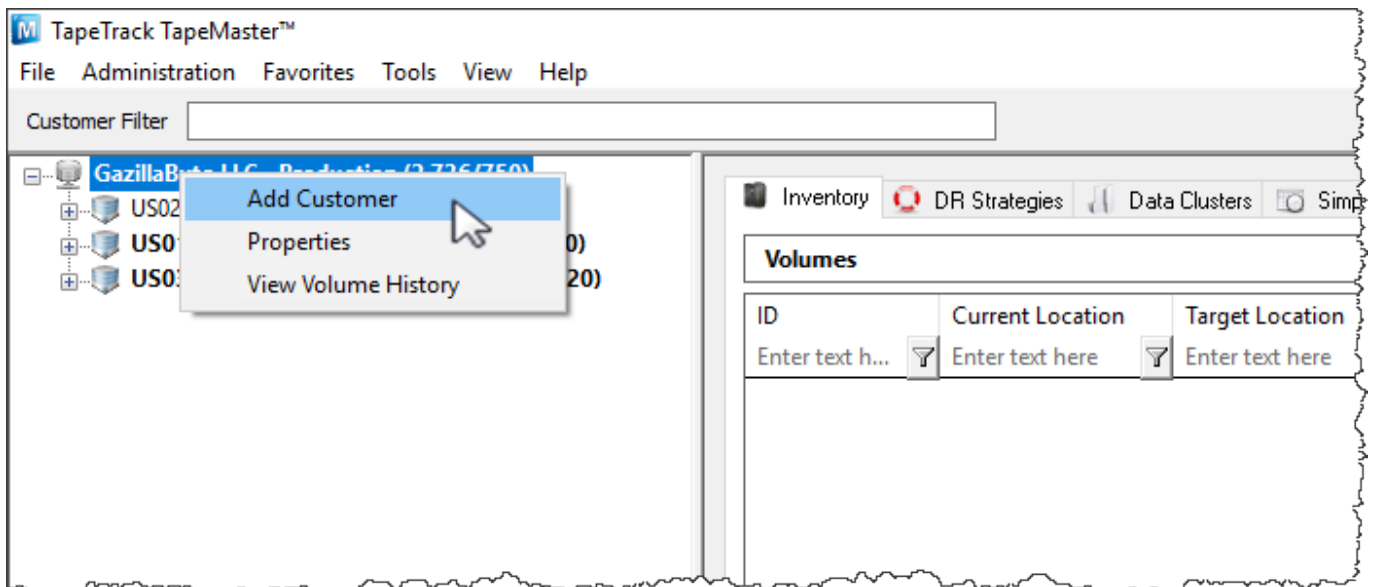


# Adding and Maintaining Customers

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.



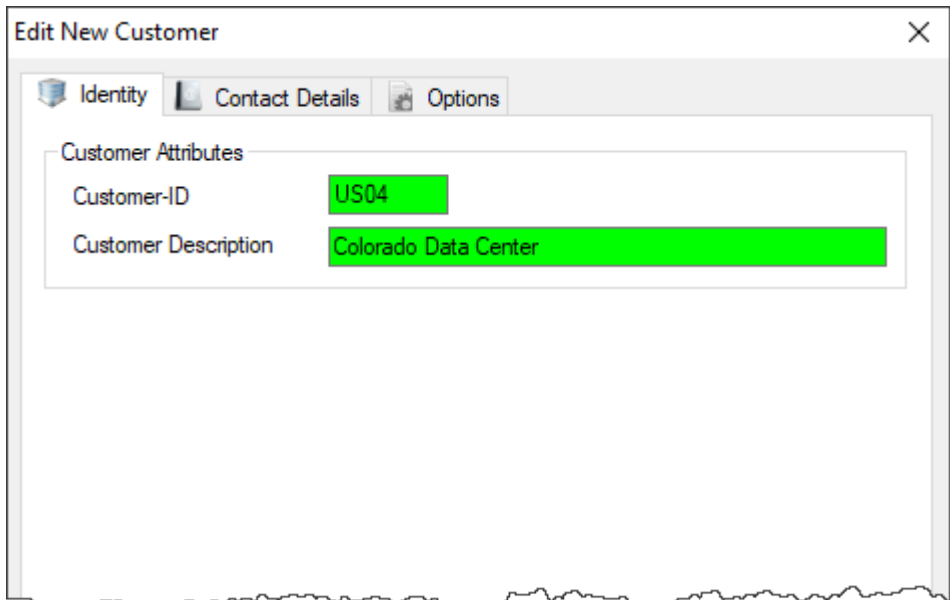
This will launch a modified version of the Customer Properties window.

### 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 [CustomerDescription](#).

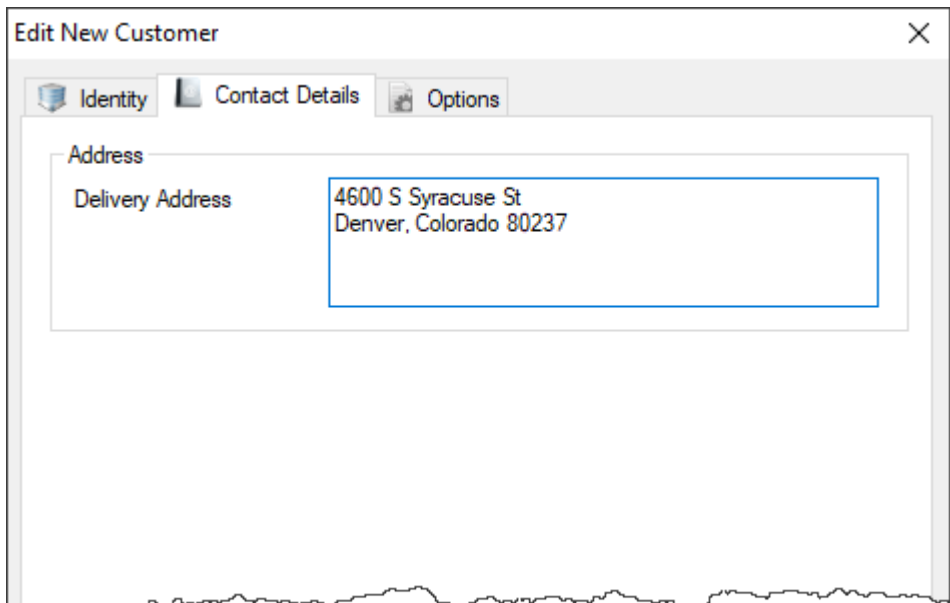


If no [Customer Description](#) is added, TapeMaster will display the [Customer-ID](#).



### Contact Details

The Contact Details tab provides a location for contact details for the [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](#), on the [Customer Tree](#) 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.
- **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 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 or customized to your required values.



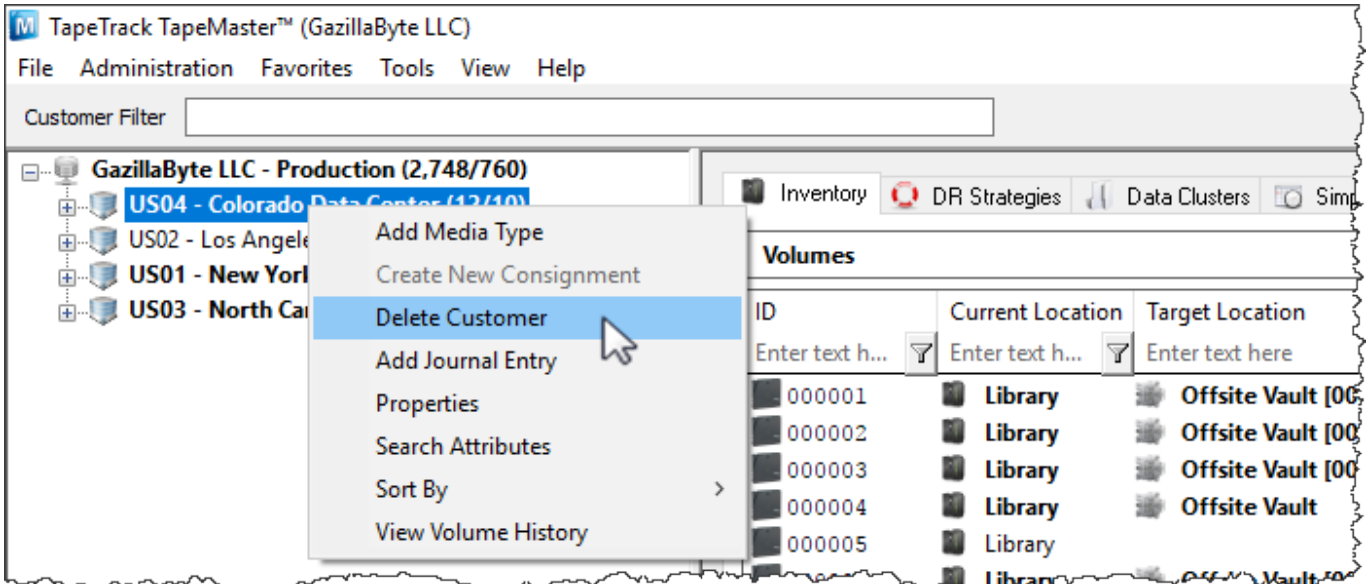
Click OK to continue.

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.



## Delete Customer

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

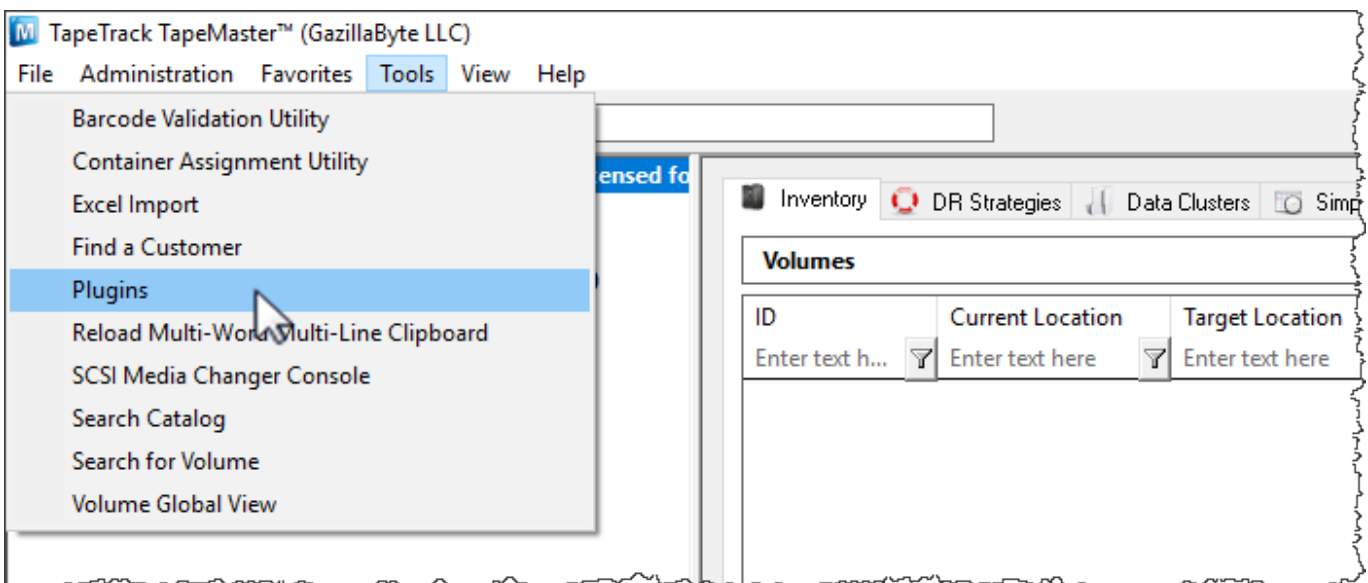


A **Customer** may only be deleted when it does not contain **Media Types**, **Repositories**, or **Volumes**.

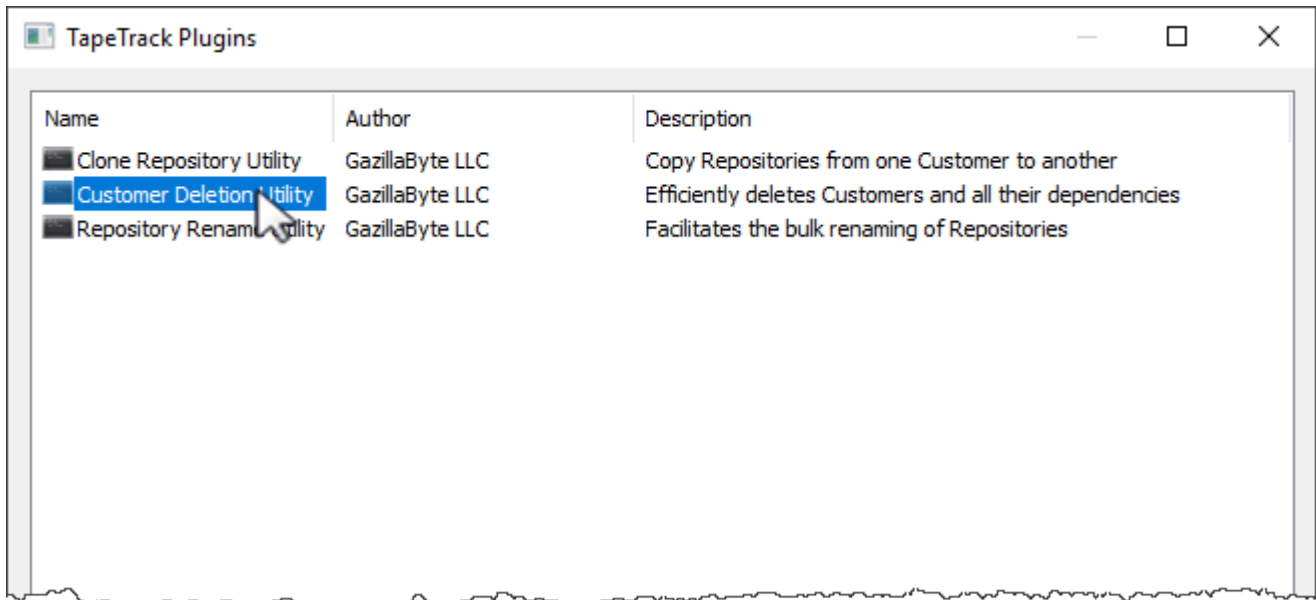


If you receive this error, delete all **volumes**, then all **repositories** and all **media types** before deleting **customer**.

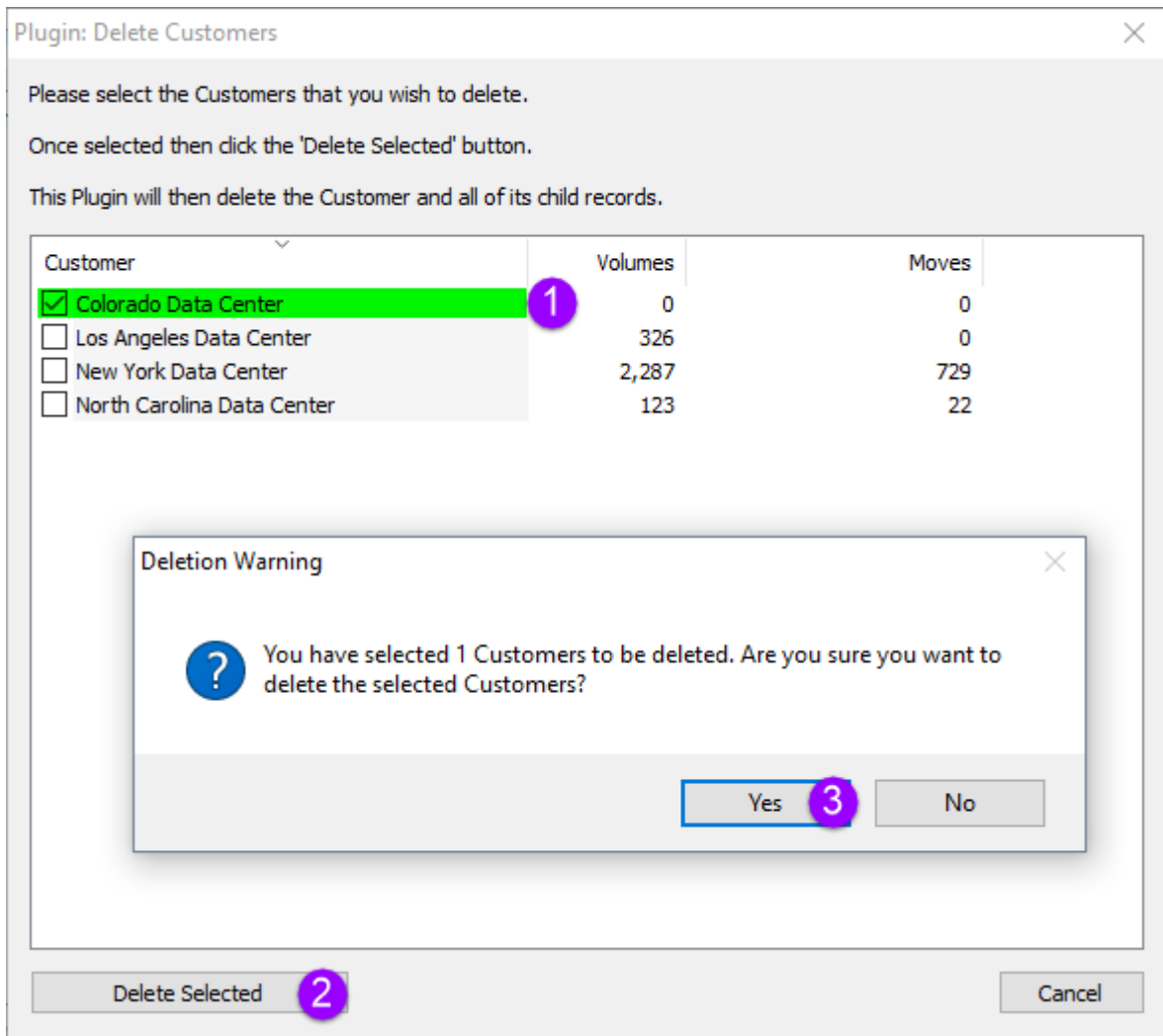
You can also delete **Customer** (without the need to remove **volumes**, **repositories** and media types first) by using the **Customer Delete** plugin. From the menu select **Tools** → **Plugins**



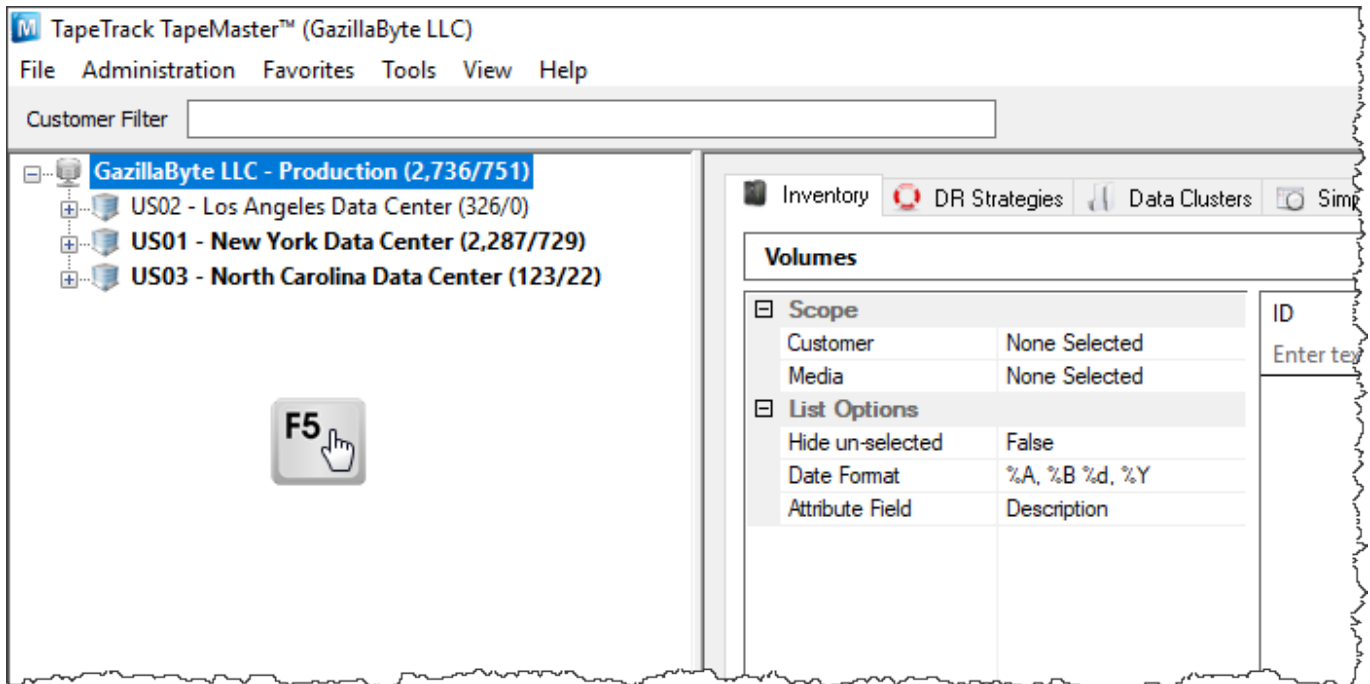
Select the **Customer Deletion Utility** by double-clicking.



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

Permanent link: <https://rtfm.tapetrack.com/master/customer?rev=1576116604>

Last update: 2025/01/21 22:07

