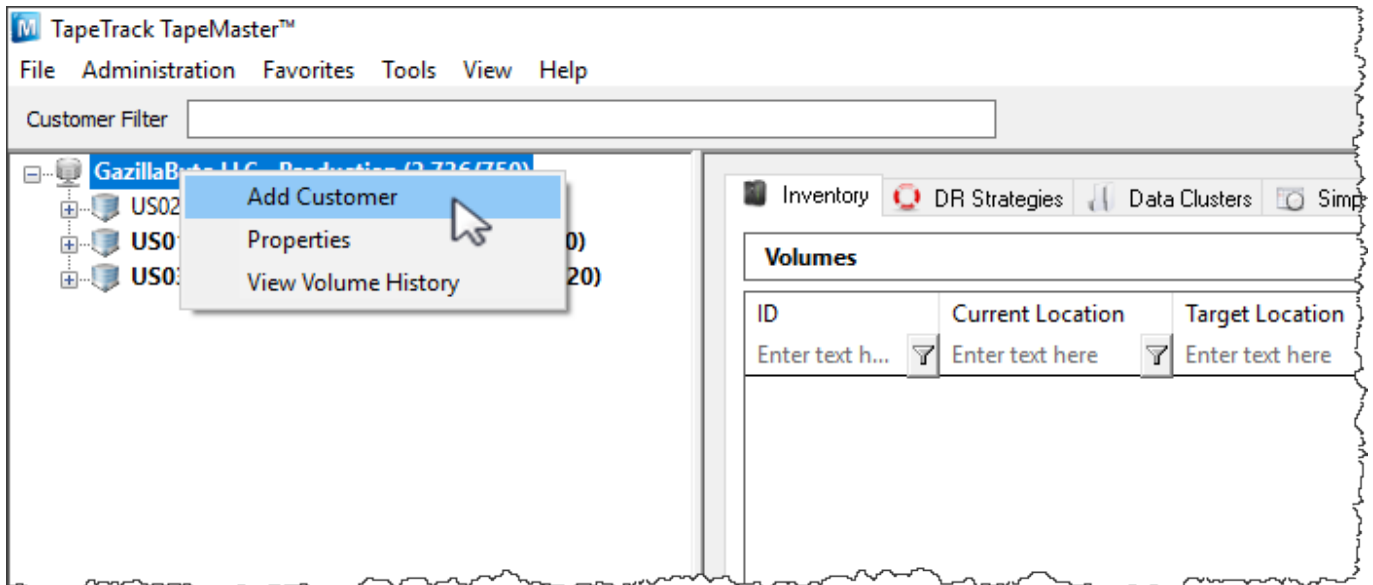


# Adding and Maintaining Customers

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](#).



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.

Setting	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	Description

- **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, [Media-ID](#) and [\[\[object:media|description](#) may be edited or customized to your required values.



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



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**.

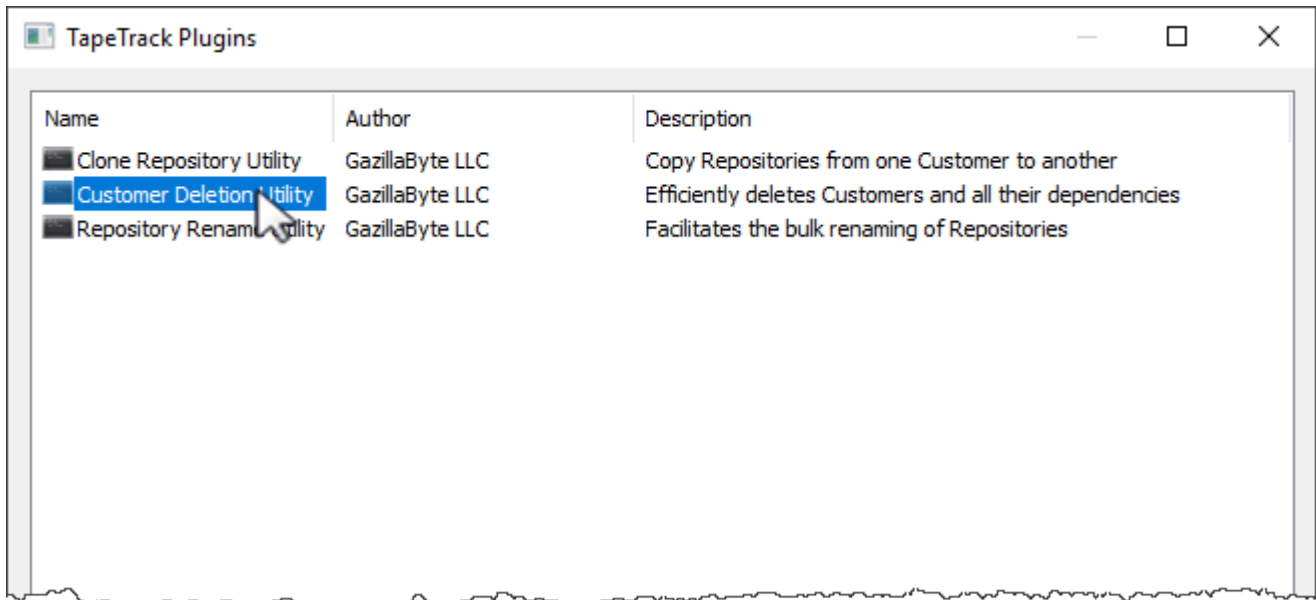


If you receive this error, delete all **volumes**, then all **repositories** and all **media types** before deleting **customer**.

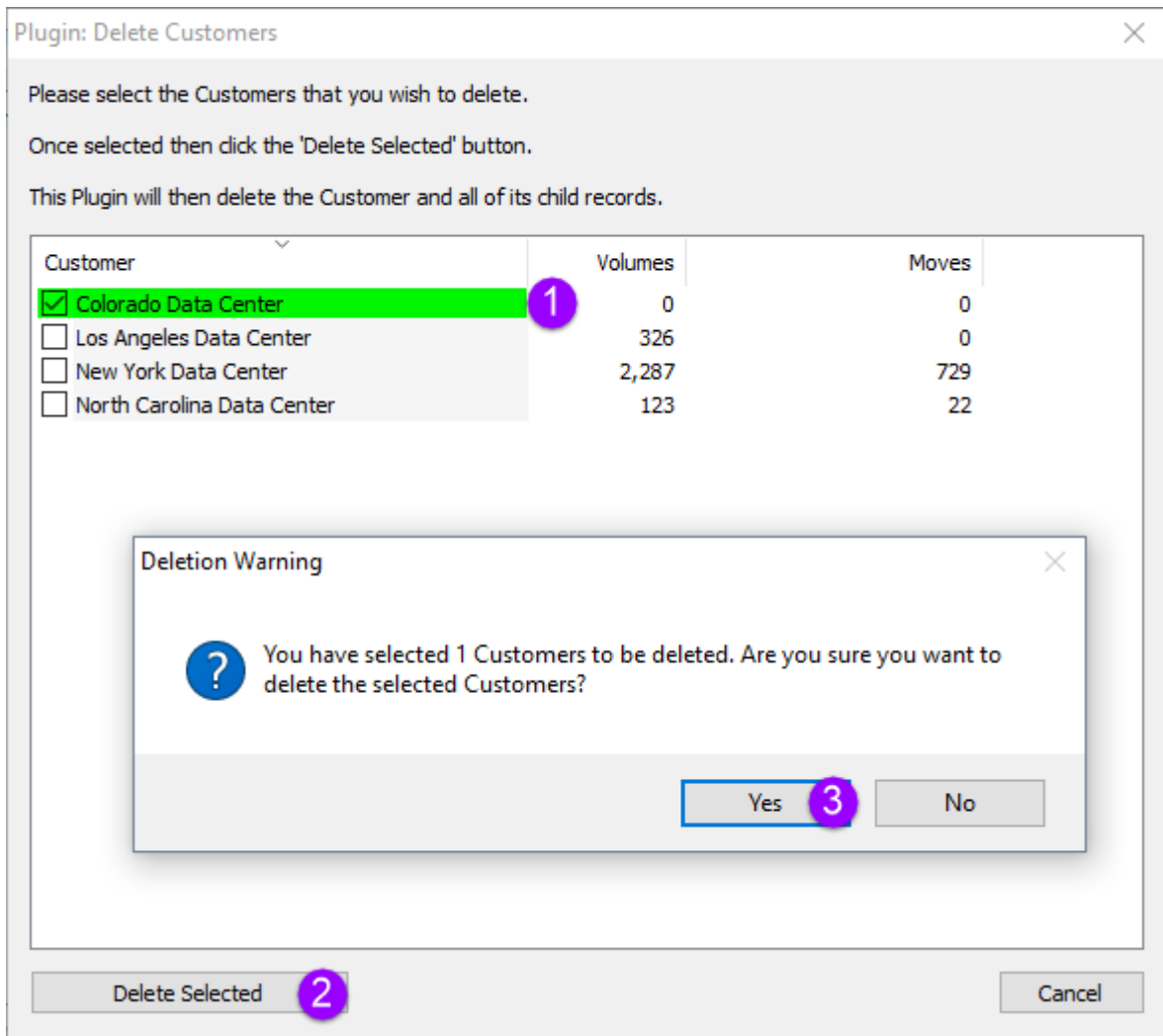
You can also delete **Customer** (without the need to remove **volumes**, **repositories** and media types first) by using the **Customer Delete** plugin. From the menu select **Tools** → **Plugins**



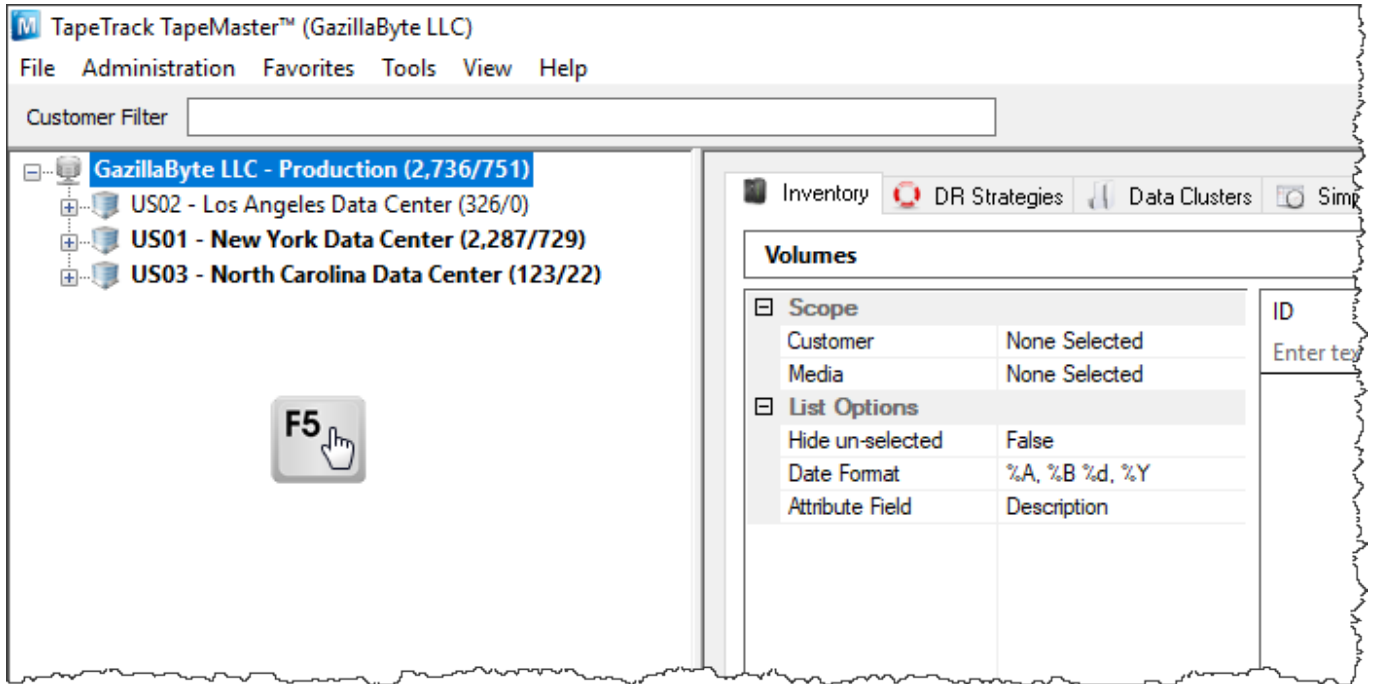
Select the **Customer Deletion Utility** by double-clicking.



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=1576116951>

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

