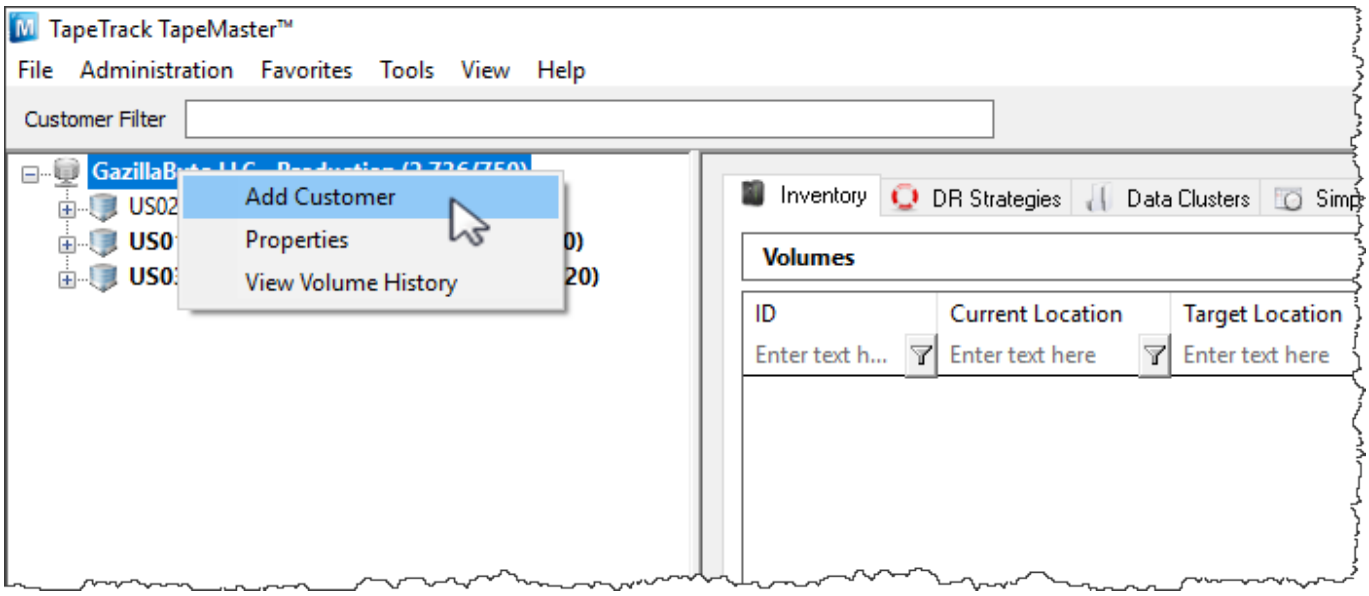
Adding and Maintaining Customers

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`.

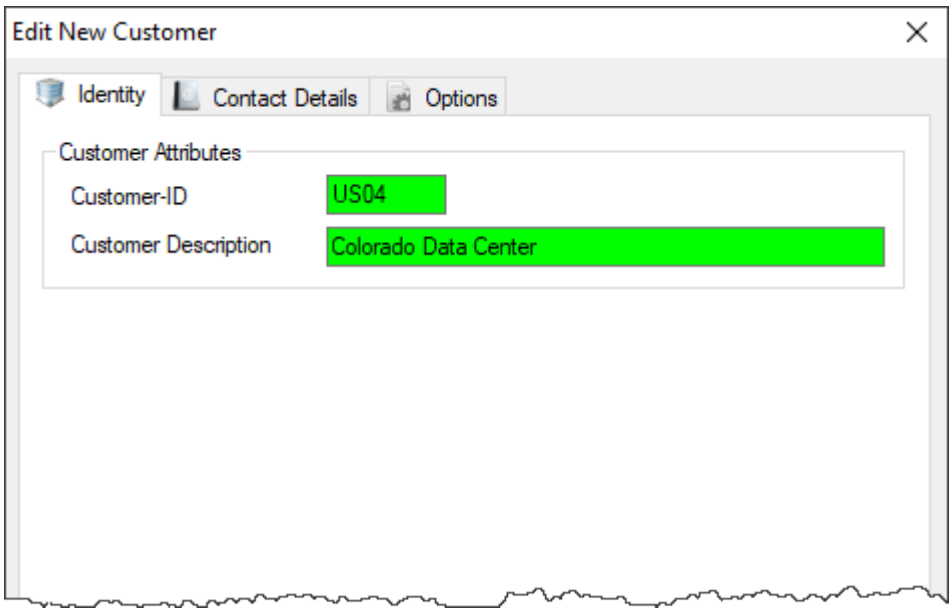


This will launch a modified version of the `Customer Properties` window.

Identity

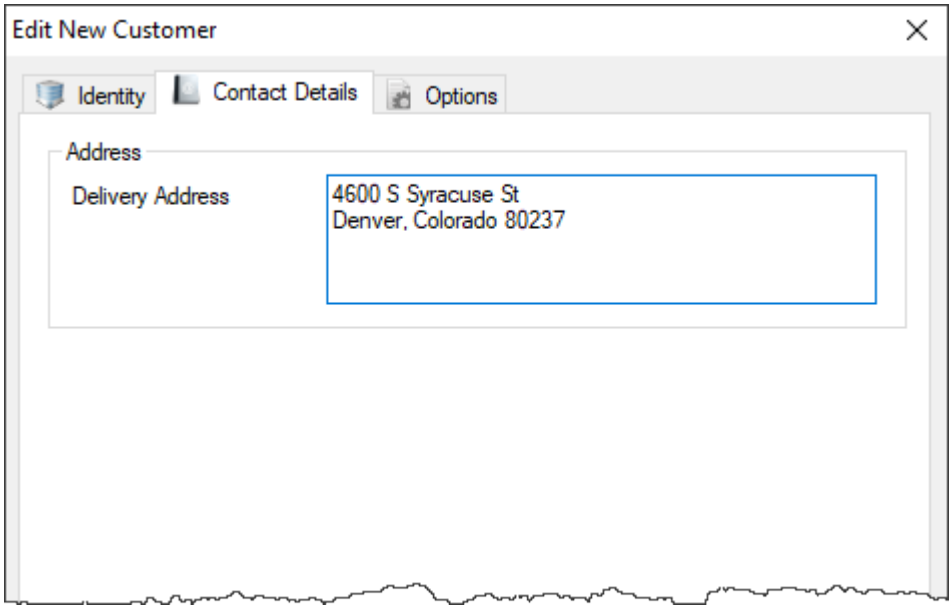
The first tab on the `Add Customer` window is the `Identity` tab. The `Identity` tab requires the input of a Customer-ID and a Customer Description. You can add up to four alphanumeric characters as the Customer-ID and up to forty alphanumeric characters for the Customer Description.

If no Customer Description is added, TapeMaster will display the Customer-ID.



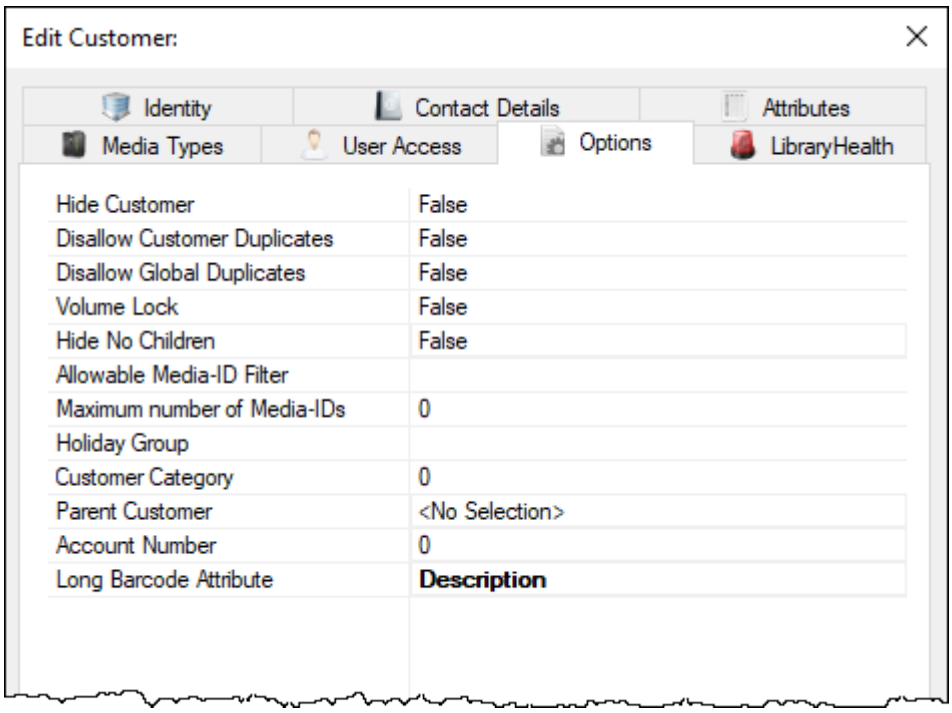
Contact Details

The `Contact Details` tab provides a location for contact details for the Customer.



Options

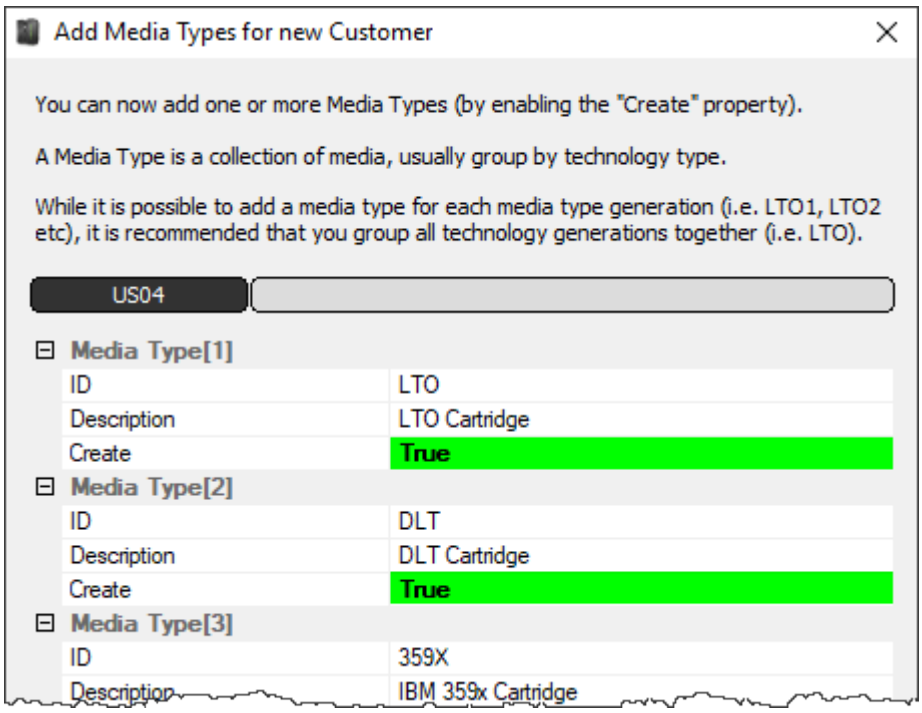
The `Options` tab can be utilized to set specific details about a Customer. These details are accessible at any point by right-clicking the Customer, on the Customer Tree and selecting `Properties`.



- **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.

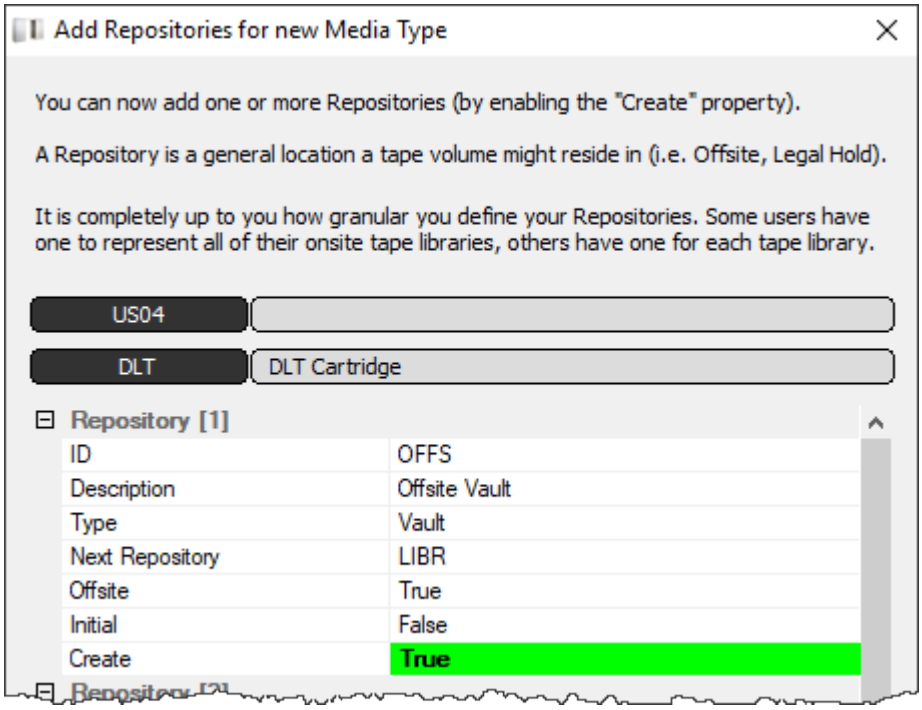
Once you click `Save`, TapeMaster will open a window asking if you'd like to add some Media to this Customer. If selected yes, then TapeMaster will display the `Add Media Types for new Customer` window. Create relevant Media Type by changing the `Create` option from `False` to `True`. Other fields, Media-ID and Description may be edited or customized to your required values.

If no Media Description is added, TapeMaster will display the Media-ID.



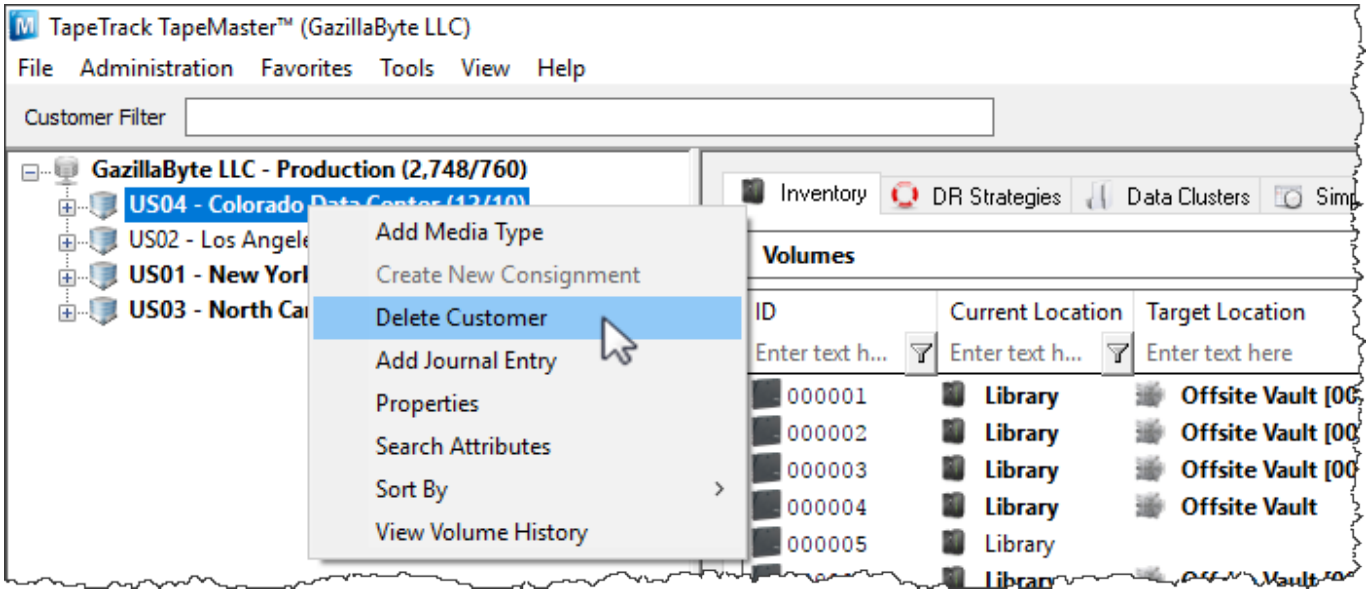
Click OK to continue.

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.

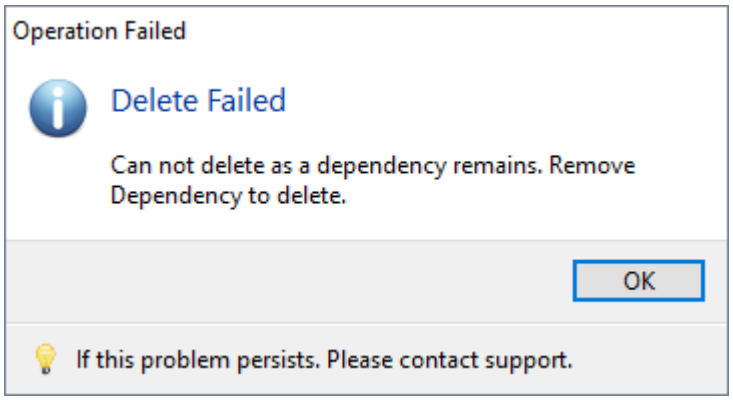


Delete Customer

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

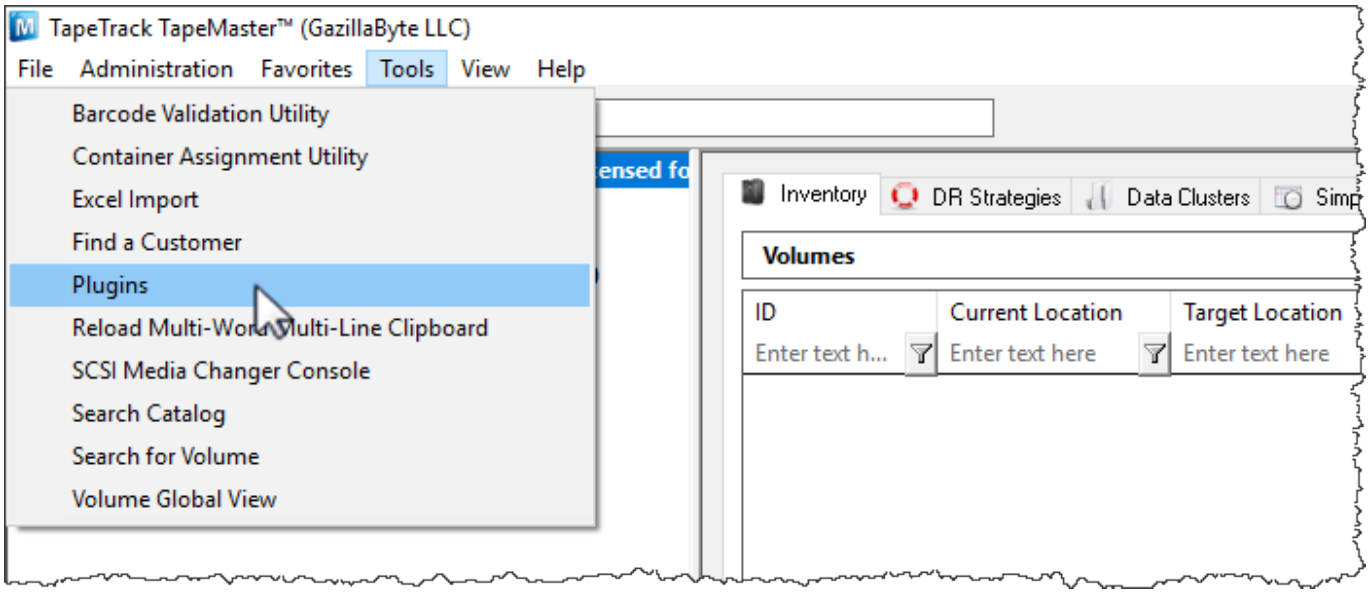


A Customer may only be deleted when it does not contain Media Types, Repositories, or Volumes.

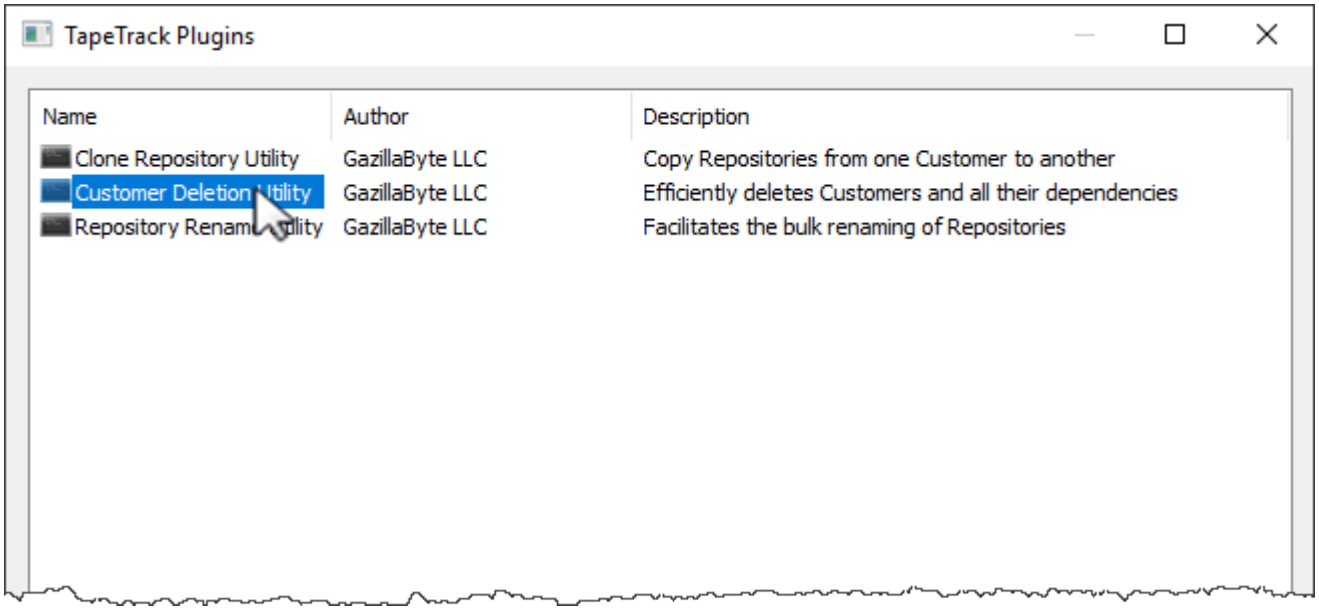


If you receive this error, delete all Volumes, then all Repositories and all Media types before deleting Customer.

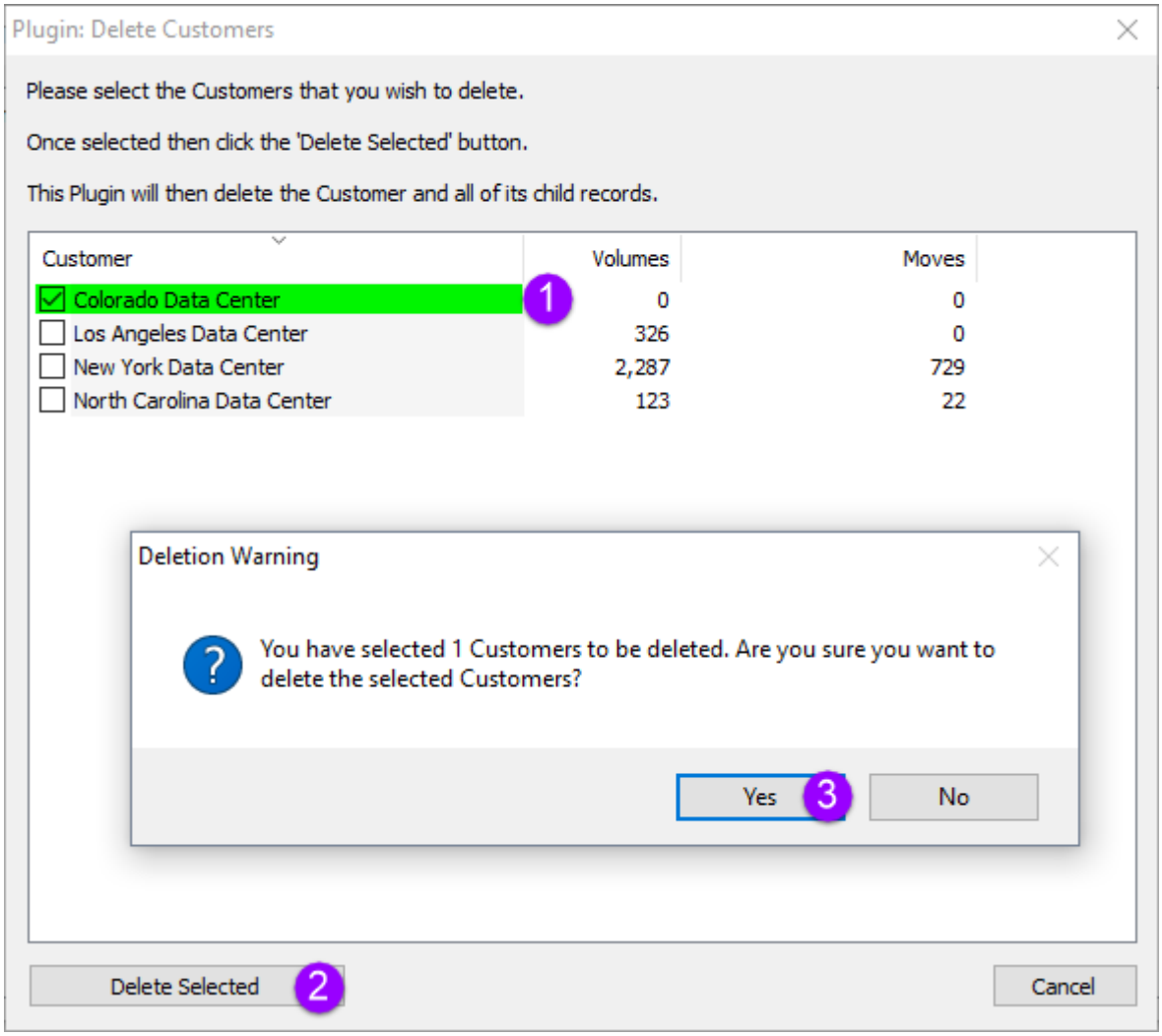
You can also delete Customer (without the need to remove Volumes, Repositories and media types first) by using the Customer Delete plugin. From the menu select `Tools` → `Plugins`



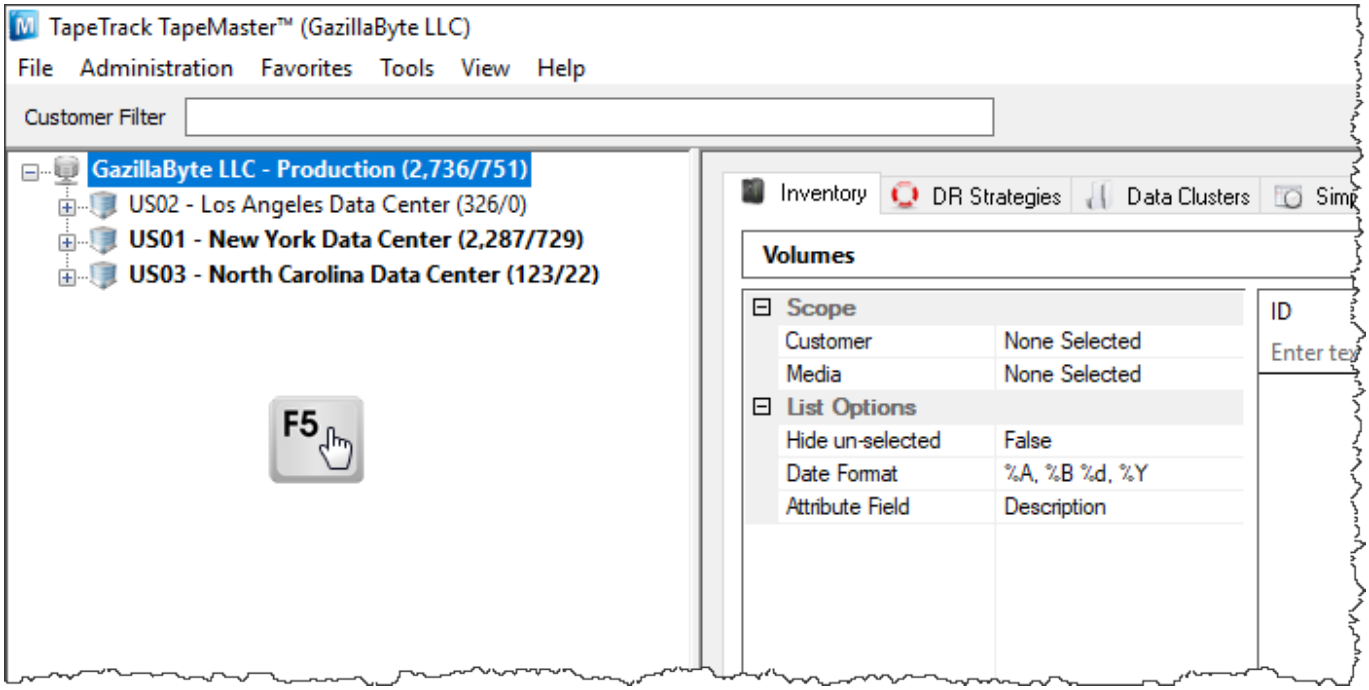
Select the `Customer Deletion Utility` by double-clicking.



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.



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