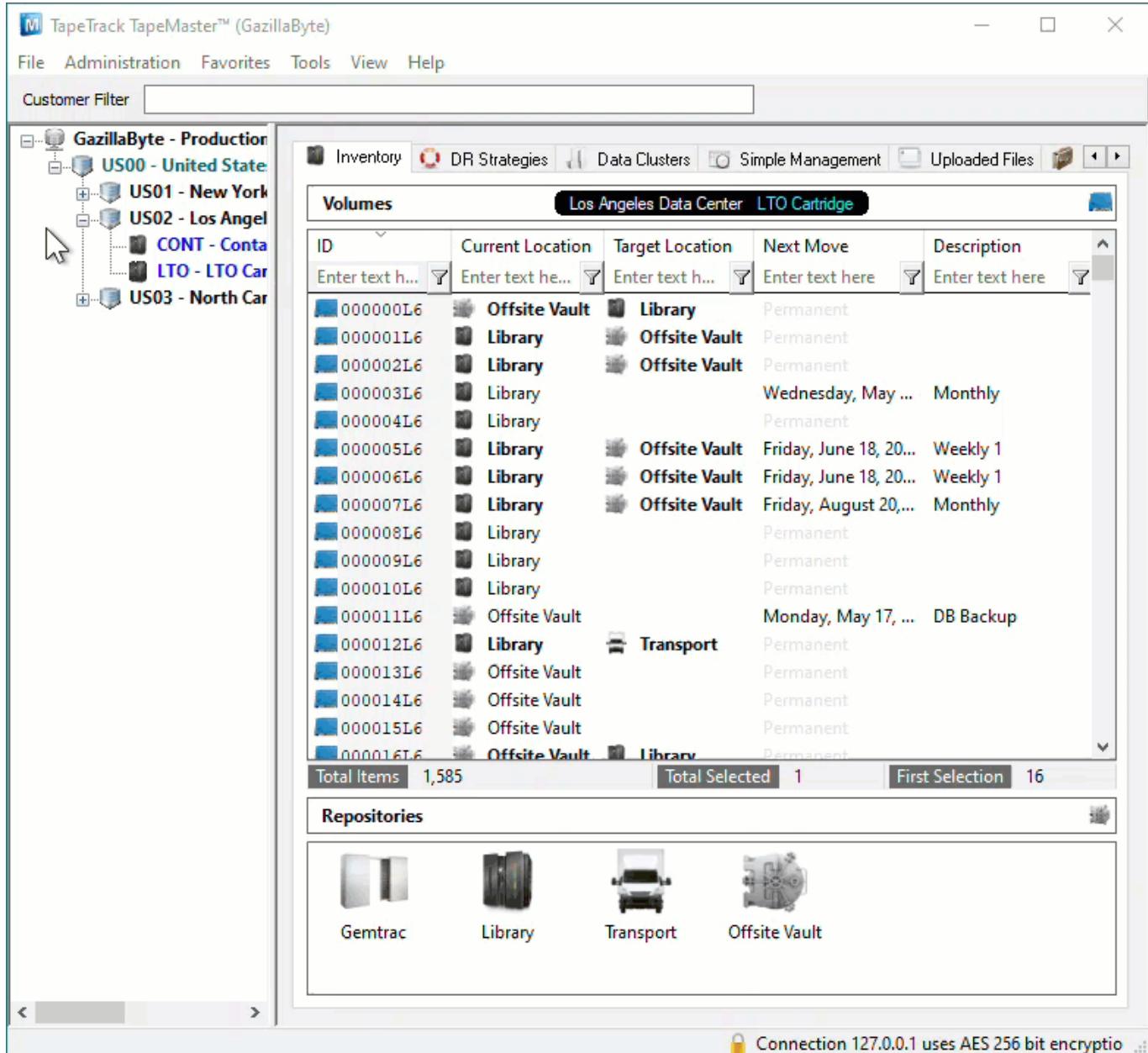


Adding and Maintaining Customers

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 the [Edit New Customer](#) window.

Identity

The first tab on the [Add Customer](#) window is the [Identity](#) tab.

Enter the [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

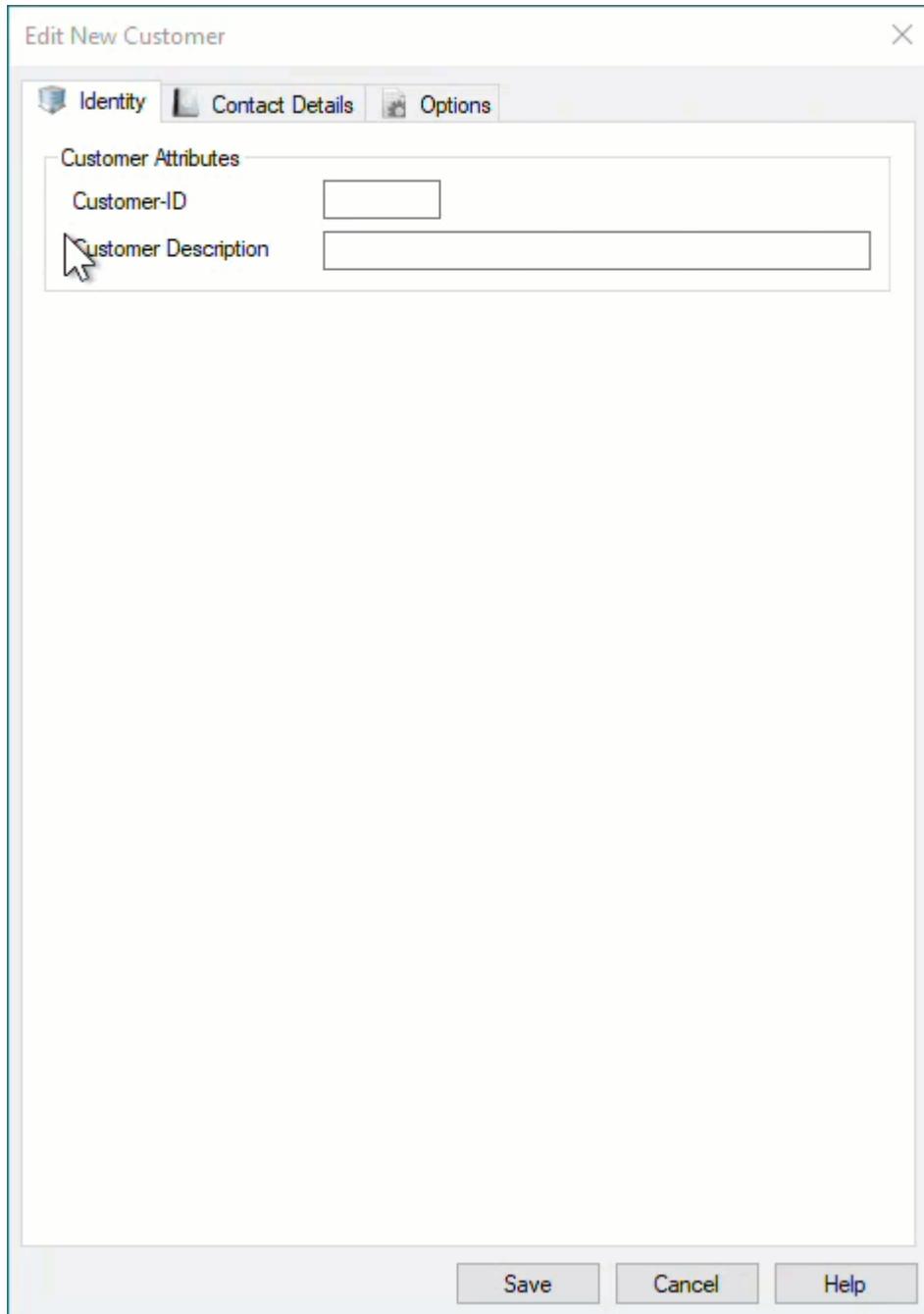
Identity Contact Details Options

Customer Attributes

Customer-ID

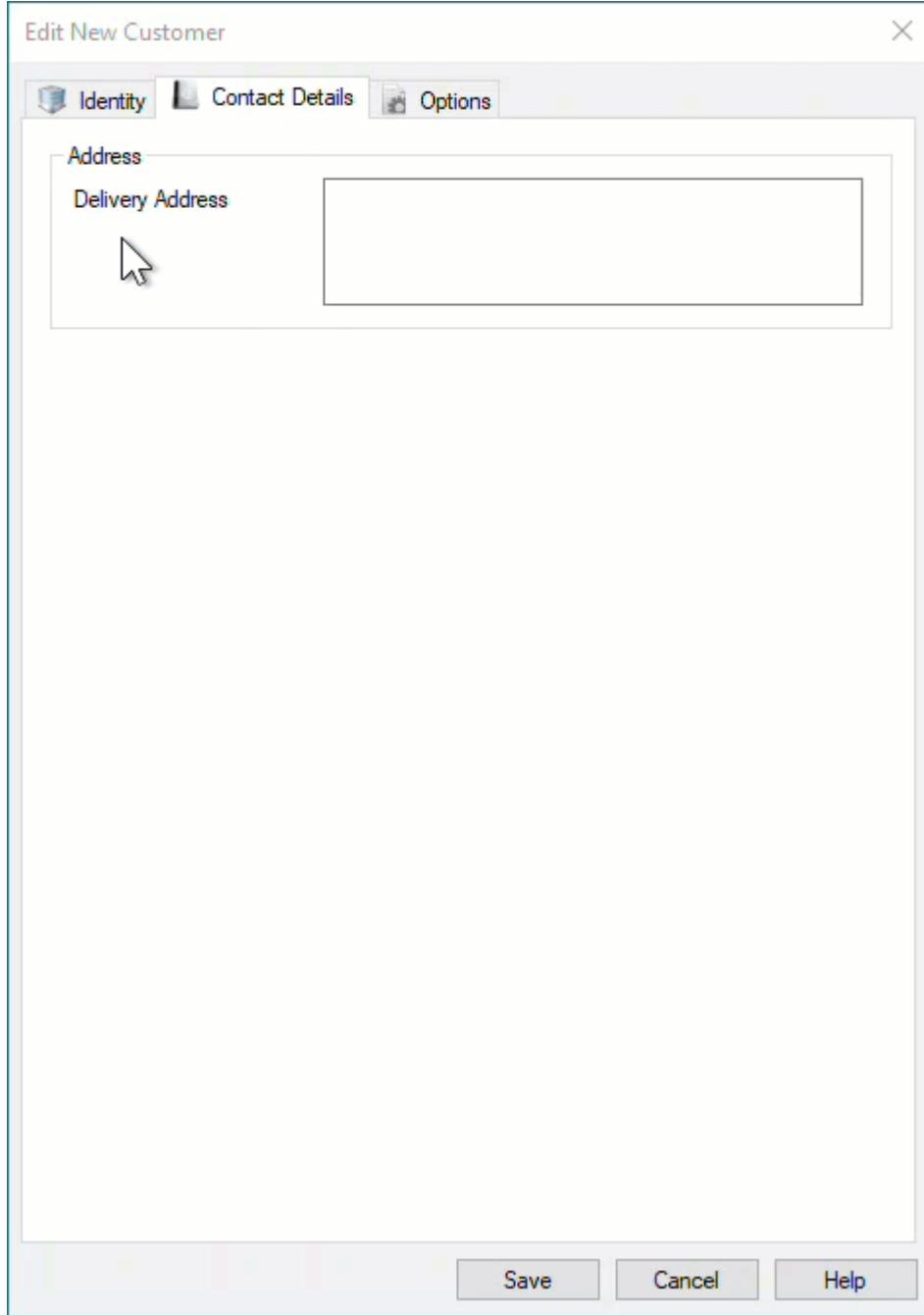
Customer Description

Save Cancel Help



Contact Details

Enter the contact details for the [Customer](#) in the [Contact Details](#) tab.



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](#).

Edit New Customer

Identity	Contact Details	Options
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	0	
Customer Category	0	
Parent Customer	<No Selection>	
Account Number	0	
Long Barcode Attribute	<Not Selected>	

Save Cancel Help

- **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**.

Add Media Types for new Customer

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	
Media Type[1]	
ID	LTO
Description	LTO Cartridge
Create	True
Media Type[2]	
ID	DLT
Description	DLT Cartridge
Create	True
Media Type[3]	
ID	359X
Description	IBM 359x Cartridge

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.

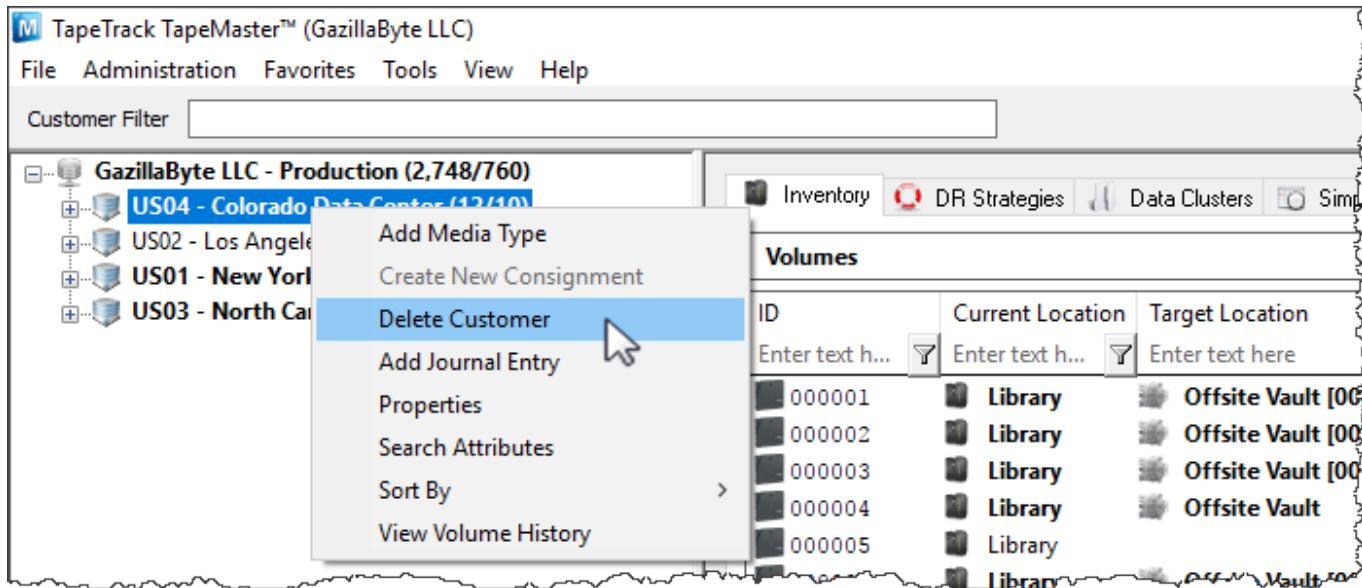
Add Repositories for new Media Type

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.

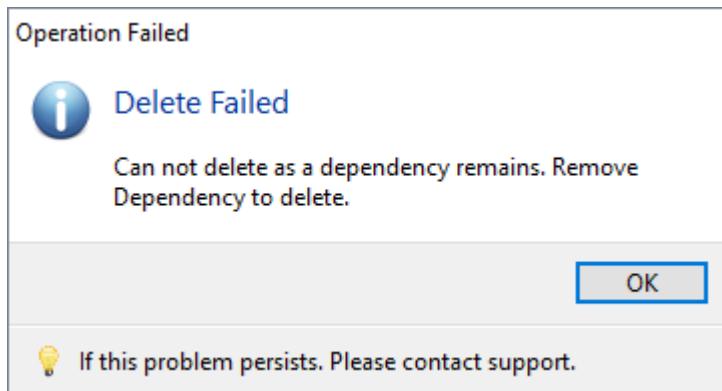
US04	
DLT	DLT Cartridge
Repository [1]	
ID	OFFS
Description	Offsite Vault
Type	Vault
Next Repository	LIBR
Offsite	True
Initial	False
Create	True

Delete Customer

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

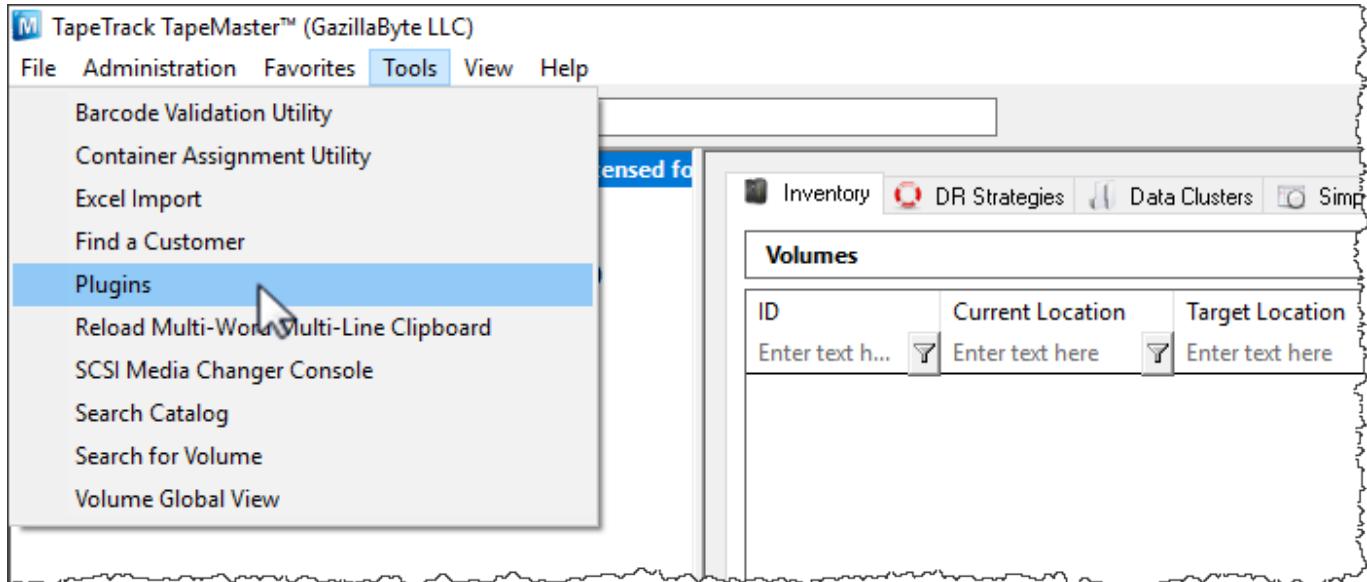


A [Customer](#) may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).

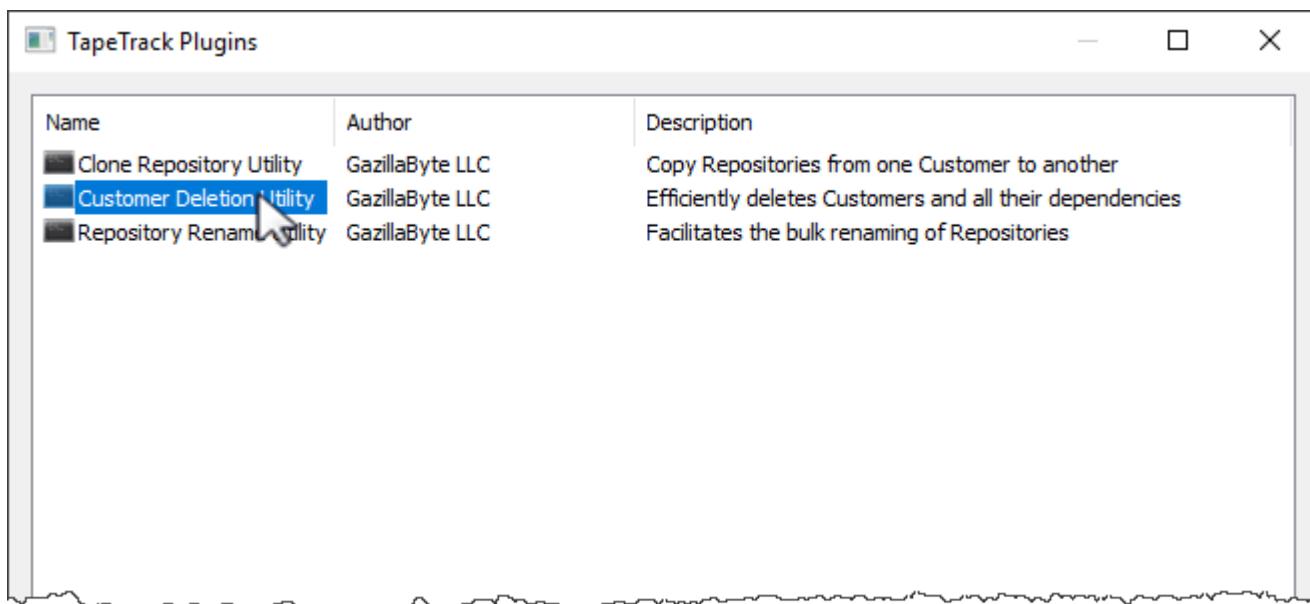


If you receive this error, delete all [Volumes](#), then all [Repositories](#) and all [Media types](#) before deleting [Customer](#).

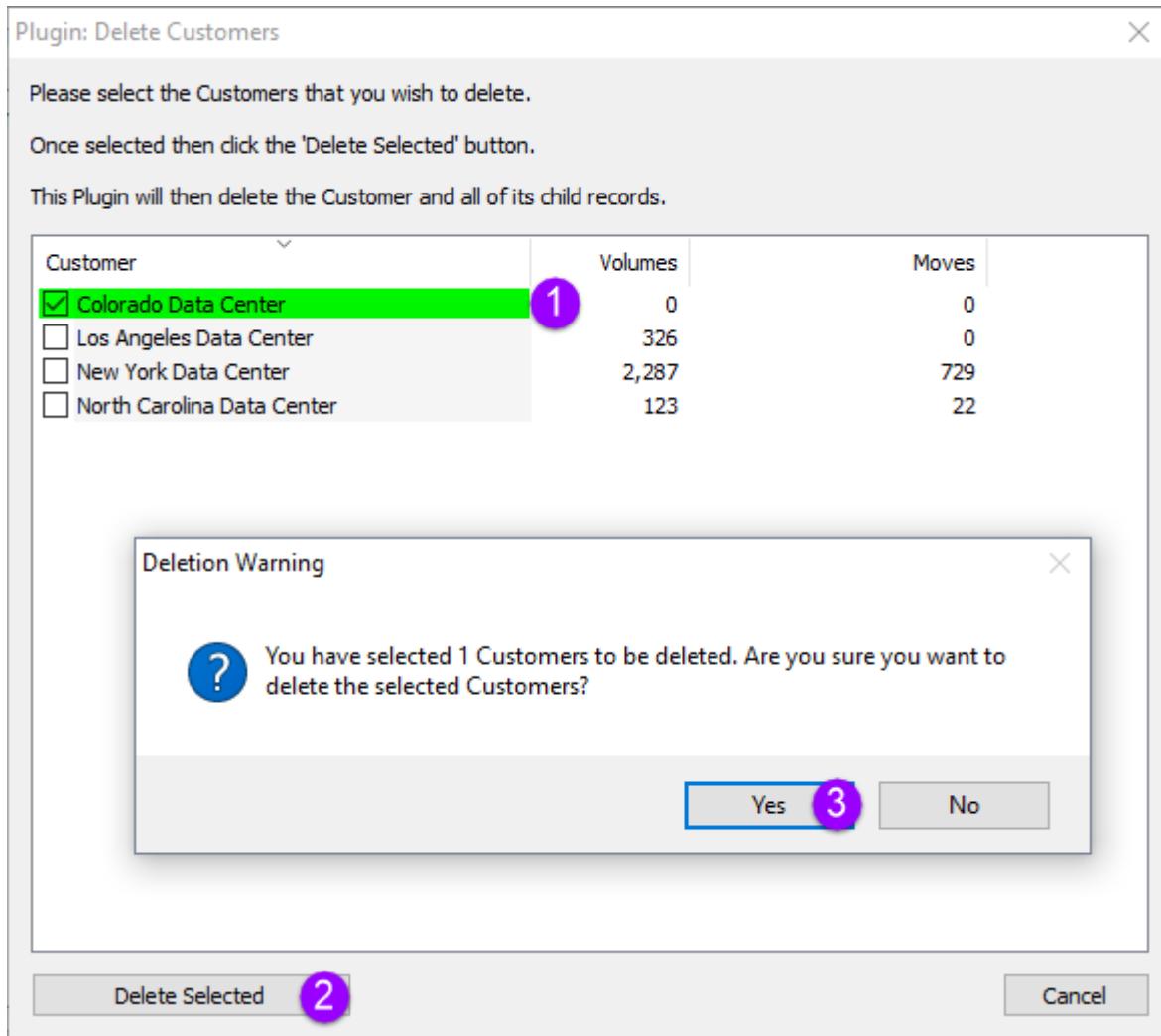
You can also delete [Customer](#) (without the need to remove [Volumes](#), [Repositories](#) and media types first) by using the [Customer Delete](#) plugin. From the menu select Tools → Plugins



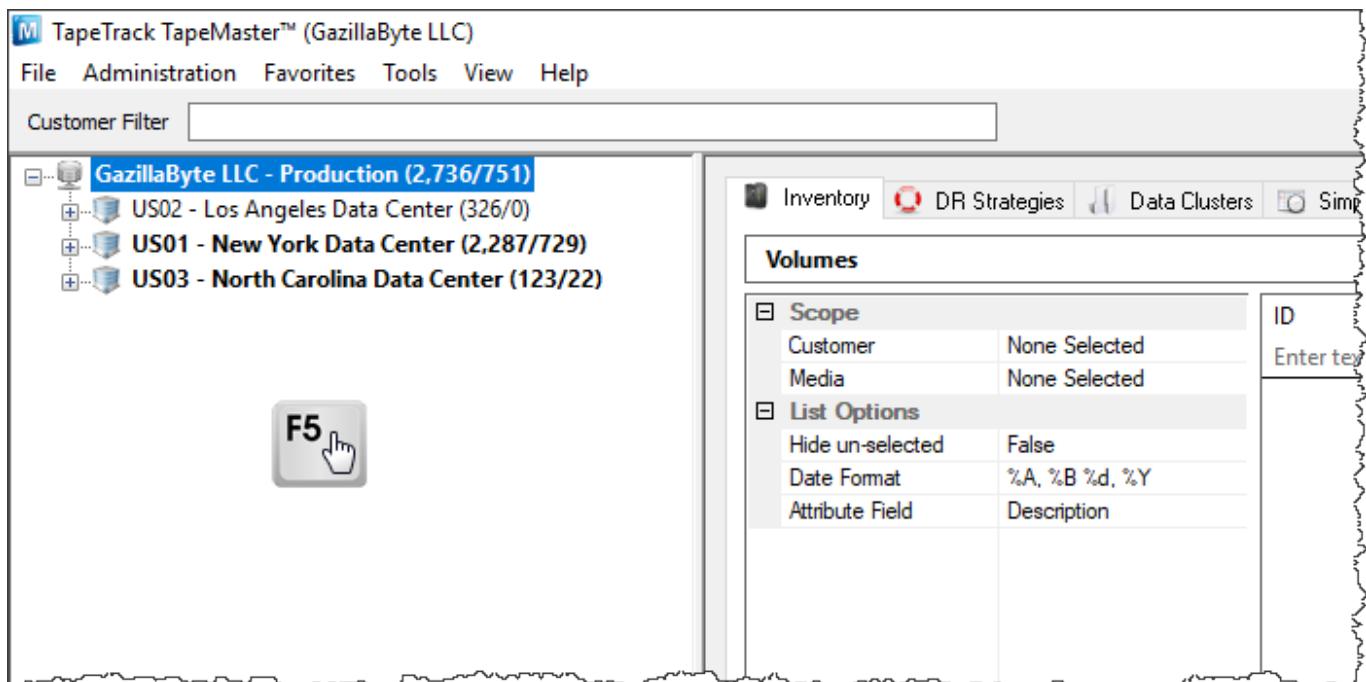
Select the Customer Deletion Utility by double-clicking.



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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Permanent link:

<https://rtfm.tapetrack.com/master/customer?rev=1617064187>

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