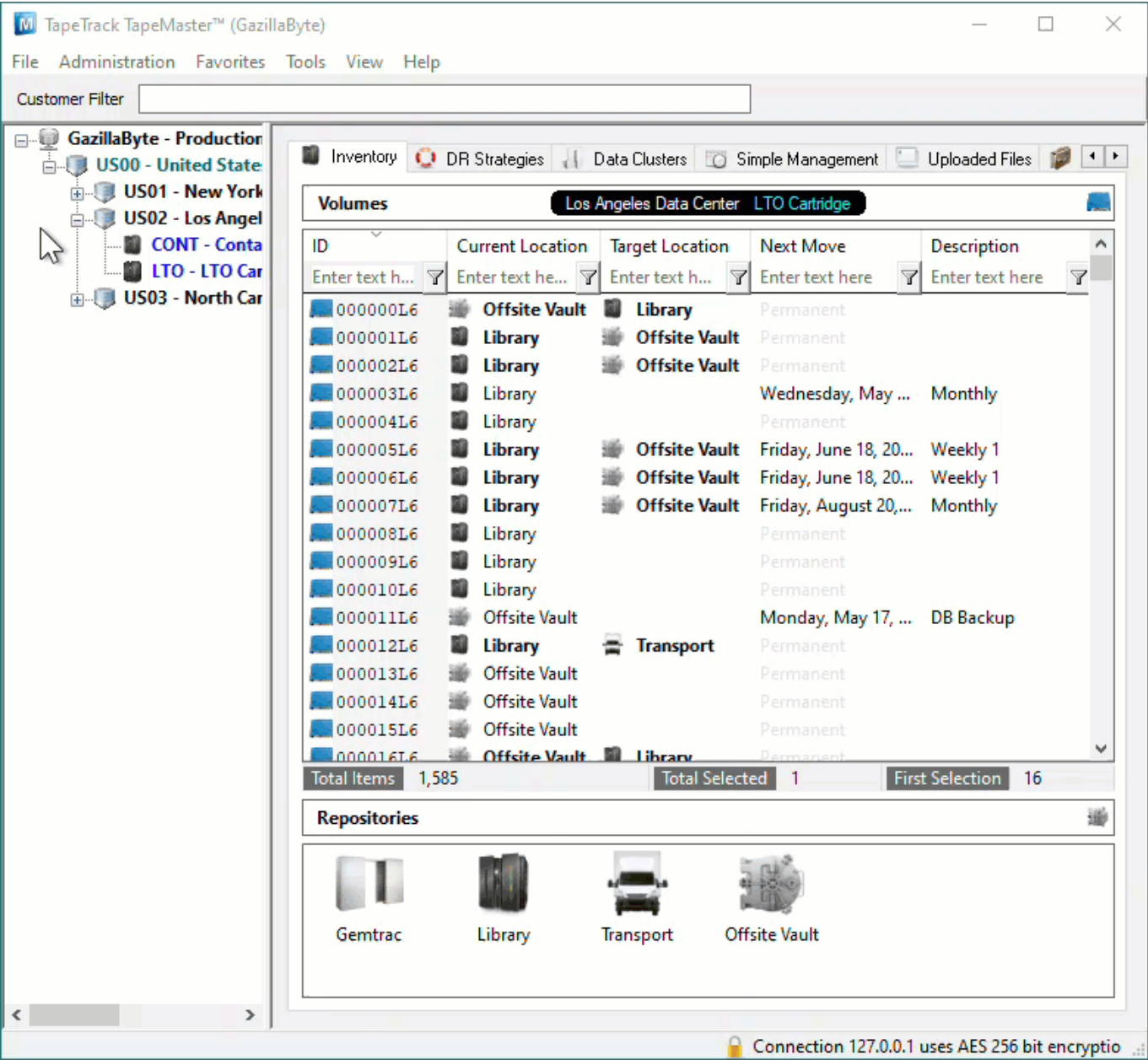


# Adding and Maintaining Customers

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.



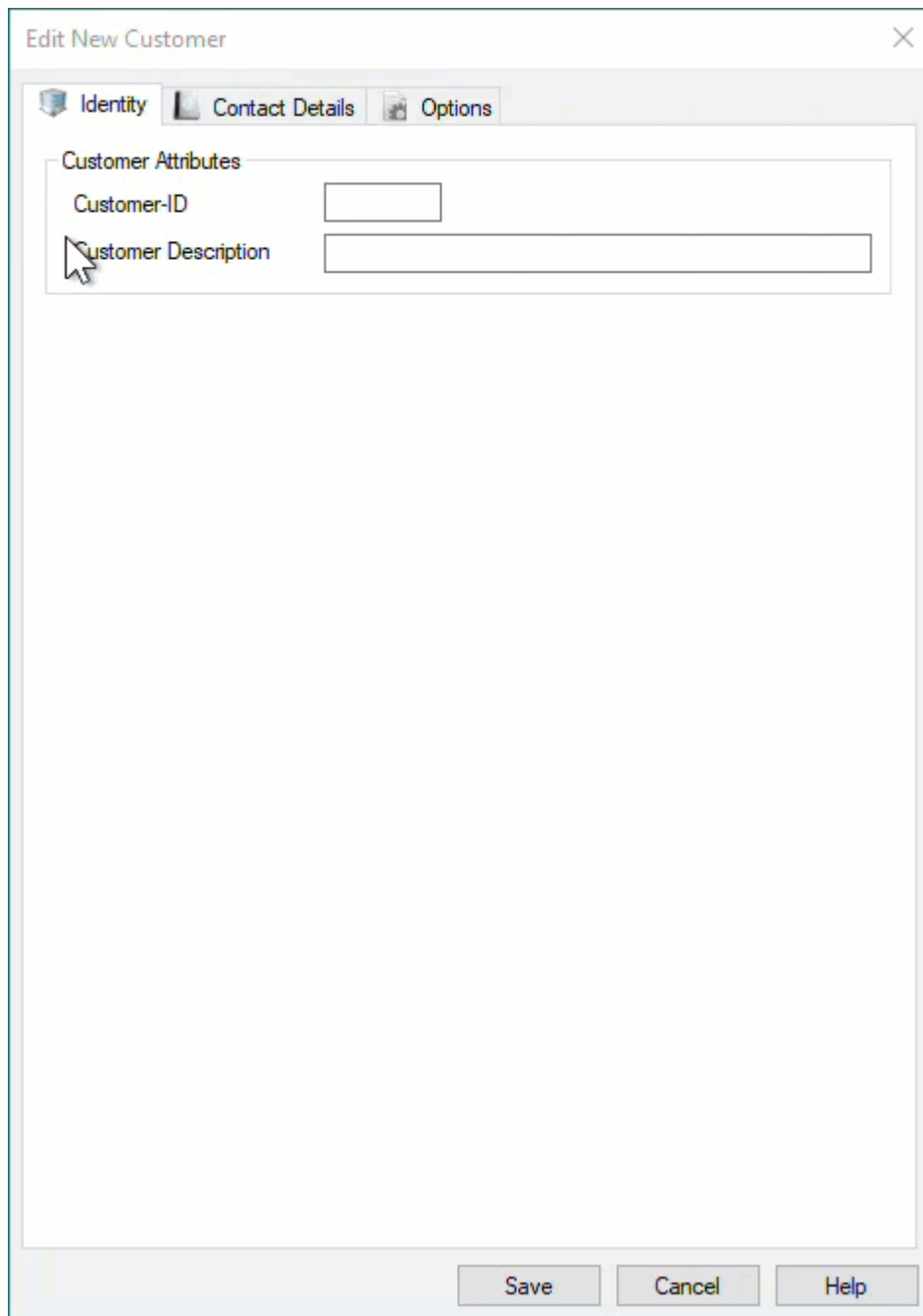
This will launch the Edit New Customer window.

## Identity

The first tab on the Add Customer window is the Identity tab.

Enter the [Customer-ID](#) and a [Customer Description](#).

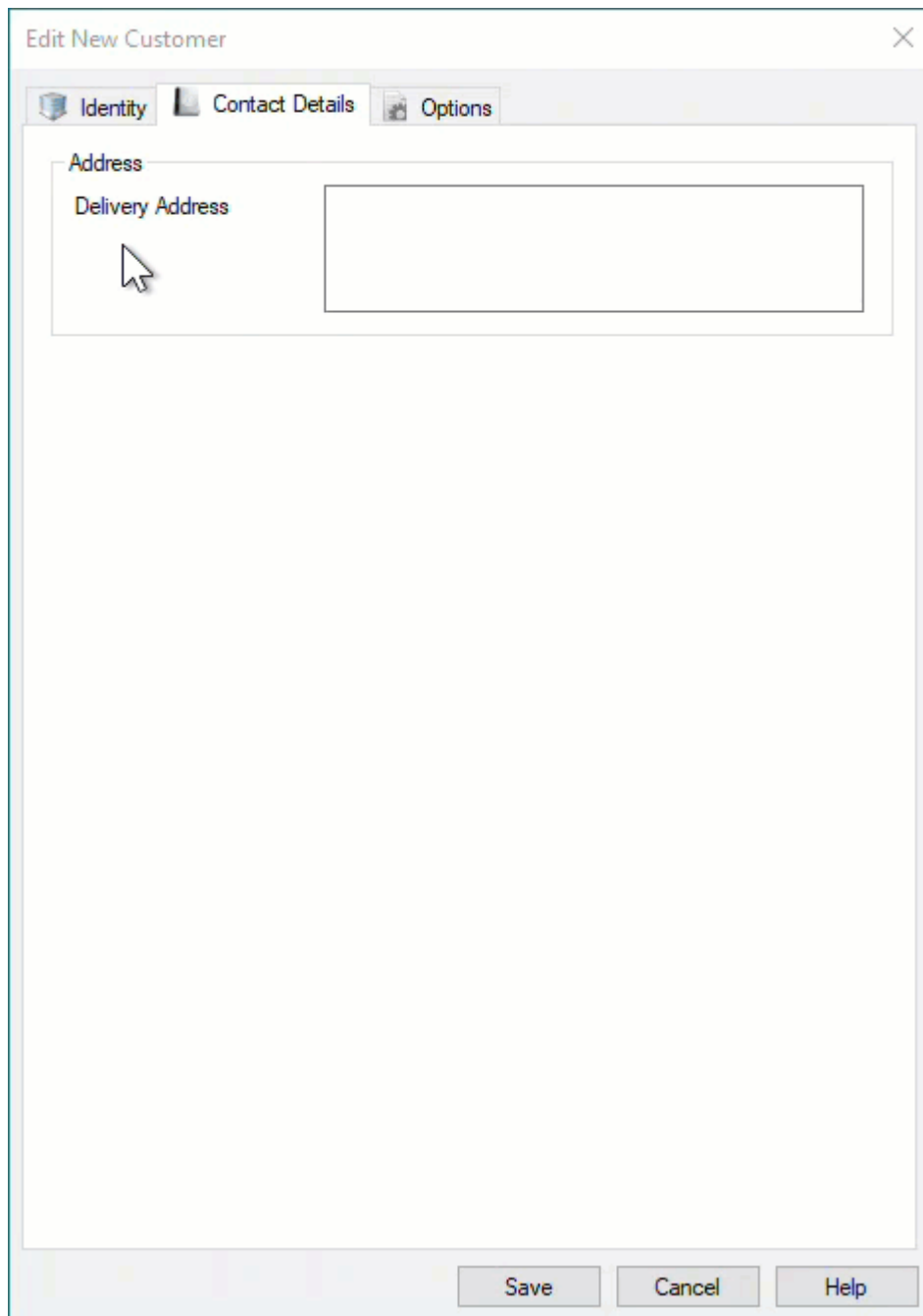
You can add up to four alphanumeric characters as the [Customer-ID](#) and up to forty alphanumeric characters for the [Customer Description](#).



The screenshot shows a software window titled "Edit New Customer" with a close button (X) in the top right corner. Inside the window, there are three tabs: "Identity" (selected), "Contact Details", and "Options". Under the "Identity" tab, there is a section labeled "Customer Attributes" containing two input fields: "Customer-ID" and "Customer Description". A mouse cursor is pointing at the "Customer Description" field. At the bottom of the window, there are three buttons: "Save", "Cancel", and "Help".

## Contact Details

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



The screenshot shows a software window titled "Edit New Customer". It features three tabs: "Identity", "Contact Details", and "Options". The "Identity" tab is selected and active. Within this tab, there is a section labeled "Address" which contains a sub-label "Delivery Address" and a large, empty rectangular text input field. A mouse cursor is positioned over the input field. At the bottom of the window, there are three buttons: "Save", "Cancel", and "Help".

## 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

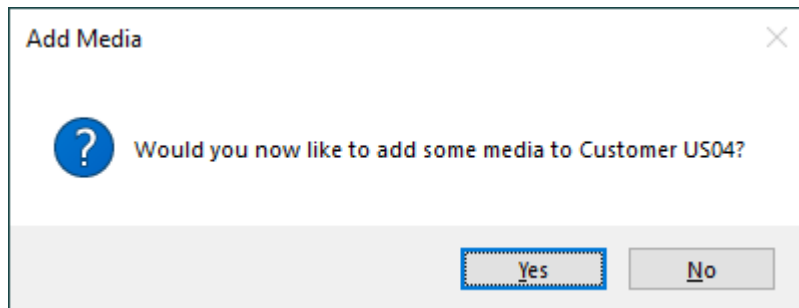
Identity Contact Details Options

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	
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 yes is selected, 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	False
Media Type[2]	
ID	DLT
Description	DLT Cartridge
Create	False
Media Type[3]	
ID	359X
Description	IBM 359x Cartridge
Create	False
Media Type[4]	
ID	T10K
Description	T1000 Cartridge
Create	False

OKCancel

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

CD Disk

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

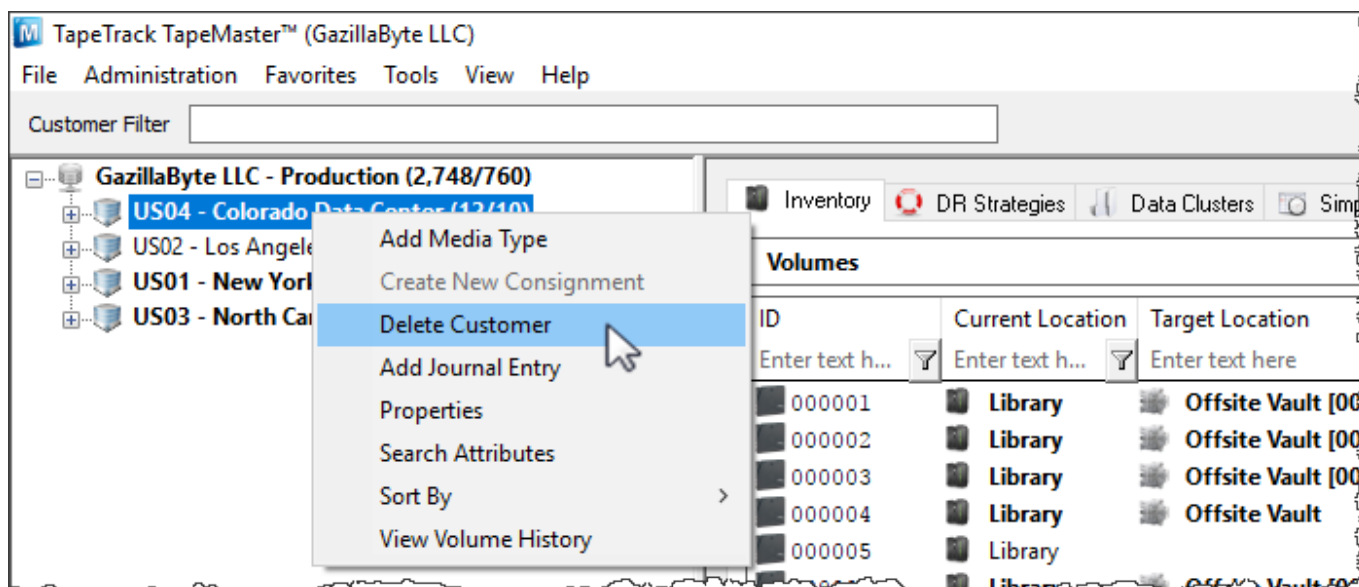
Repository [2]	
ID	LIBR
Description	Library
Type	Library
Next Repository	OFFS
Offsite	False
Initial	True
Create	False

Repository [3]	
ID	HOLD
Description	Legal Hold
Type	Legal Hold

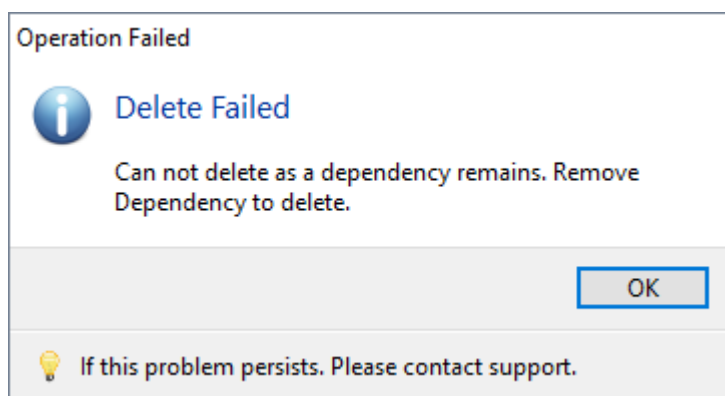
OK Cancel

## Delete Customer

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

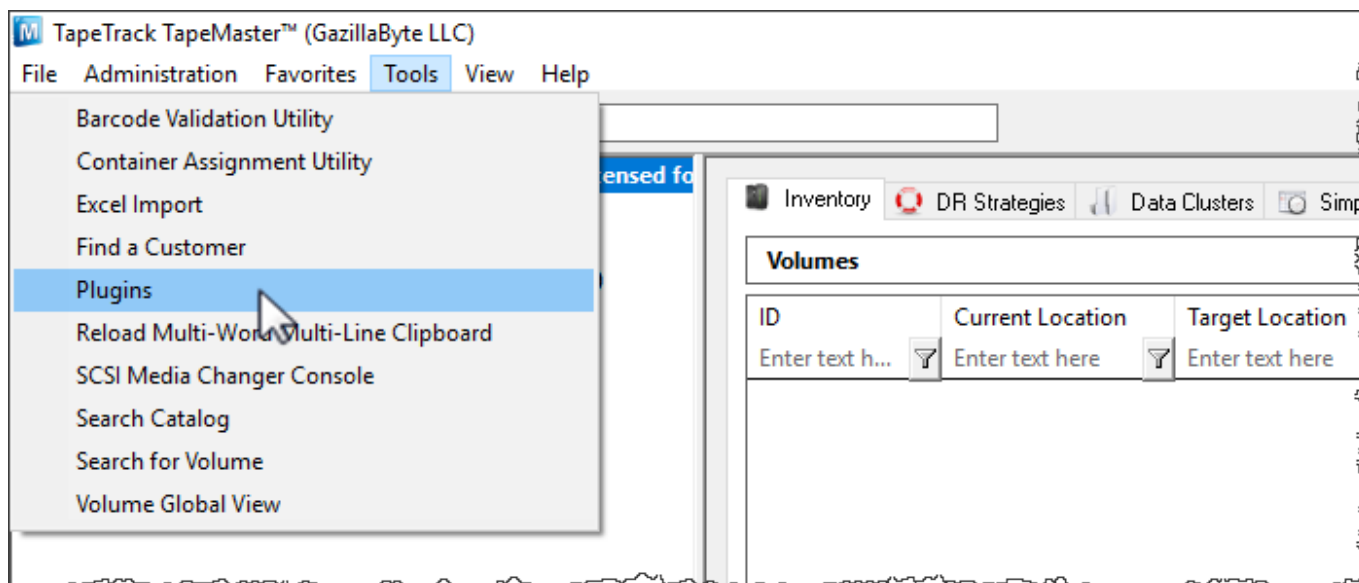


A [Customer](#) may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).



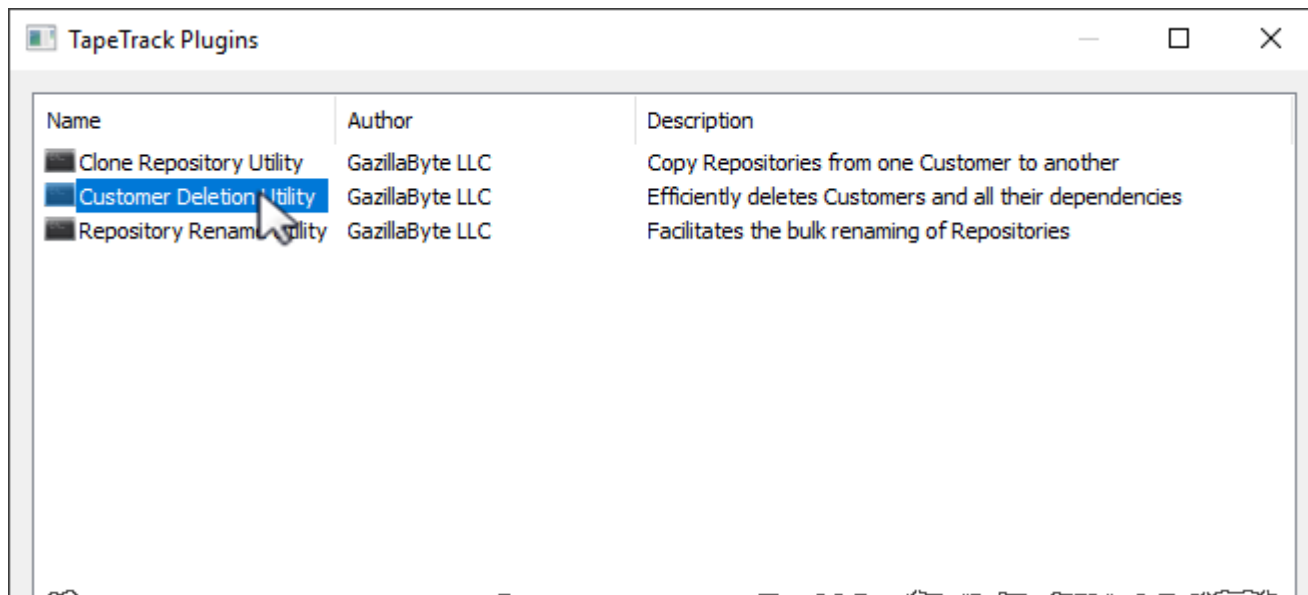
If you receive this error, delete all [Volumes](#), then all [Repositories](#) and all [Media types](#) before deleting [Customer](#).

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

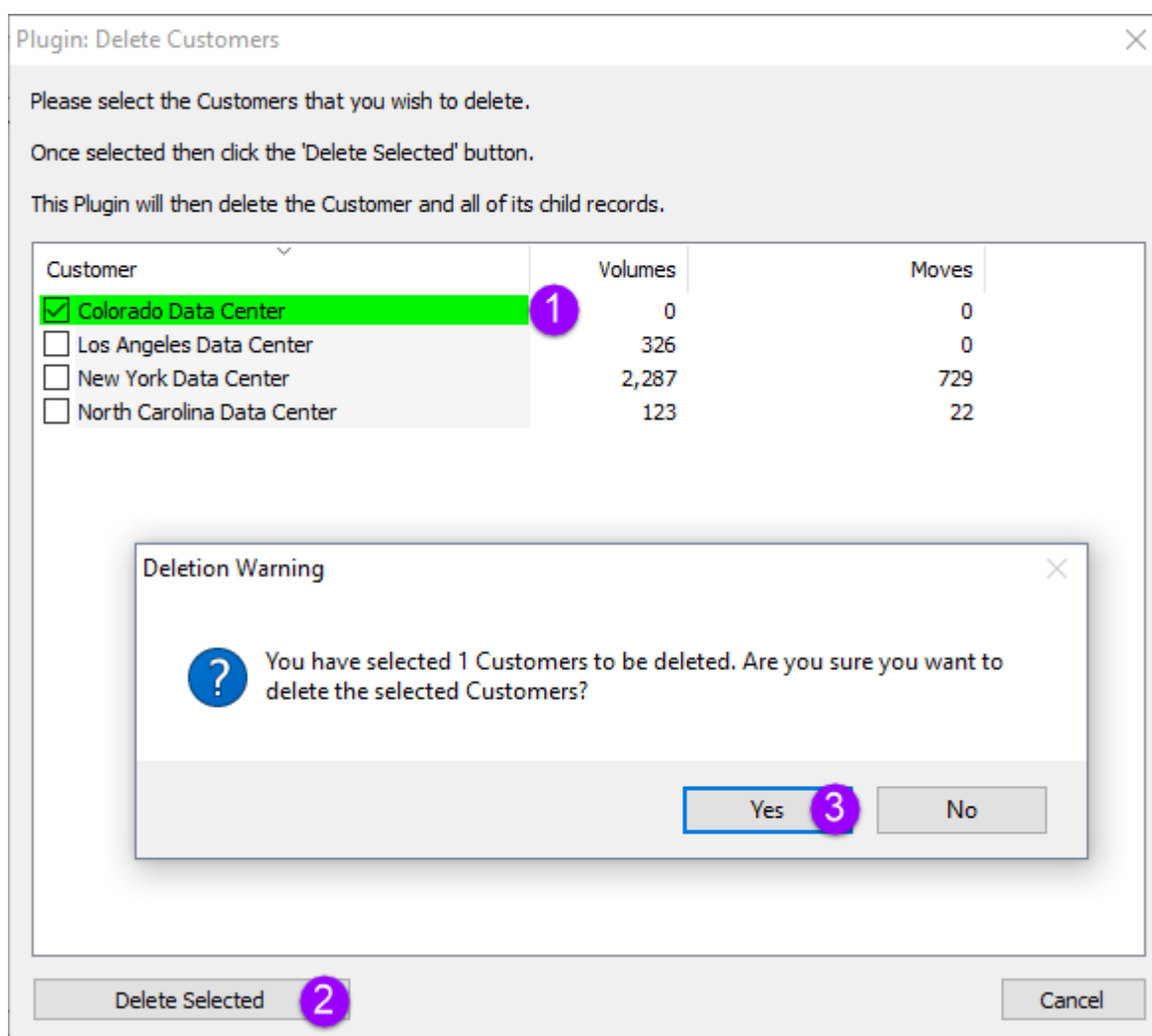


Select the Customer Deletion Utility by double-clicking.

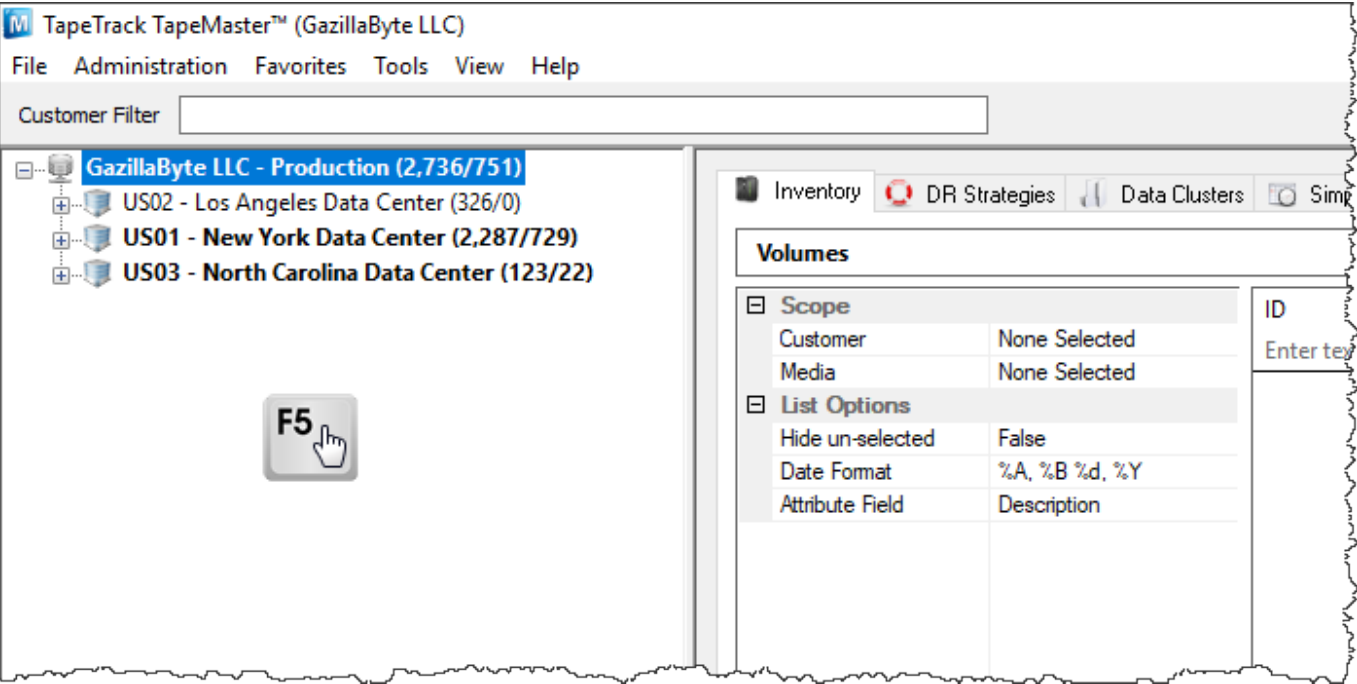




Check each [Customer](#) (1) you wish to remove and click Delete Selected (2) and Yes (3) to the warning popup.



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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