

# 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.

The screenshot displays the TapeTrack TapeMaster™ (GazillaByte) application window. The main area shows a list of volumes for the 'Los Angeles Data Center LTO Cartridge'. The table below represents the data shown in the interface:

ID	Current Location	Target Location	Next Move	Description
000000L6	Offsite Vault	Library	Permanent	
000001L6	Library	Offsite Vault	Permanent	
000002L6	Library	Offsite Vault	Permanent	
000003L6	Library		Wednesday, May ...	Monthly
000004L6	Library		Permanent	
000005L6	Library	Offsite Vault	Friday, June 18, 20...	Weekly 1
000006L6	Library	Offsite Vault	Friday, June 18, 20...	Weekly 1
000007L6	Library	Offsite Vault	Friday, August 20,...	Monthly
000008L6	Library		Permanent	
000009L6	Library		Permanent	
000010L6	Library		Permanent	
000011L6	Offsite Vault		Monday, May 17, ...	DB Backup
000012L6	Library	Transport	Permanent	
000013L6	Offsite Vault		Permanent	
000014L6	Offsite Vault		Permanent	
000015L6	Offsite Vault		Permanent	
000016L6	Offsite Vault	Library	Permanent	

At the bottom of the volume list, the status bar shows: Total Items 1,585, Total Selected 1, and First Selection 16. Below the volume list is a 'Repositories' section with icons for Gemtrac, Library, Transport, and Offsite Vault. The status bar at the very bottom indicates 'Connection 127.0.0.1 uses AES 256 bit encryption'.

This will launch the Edit New Customer window.

## Identity

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

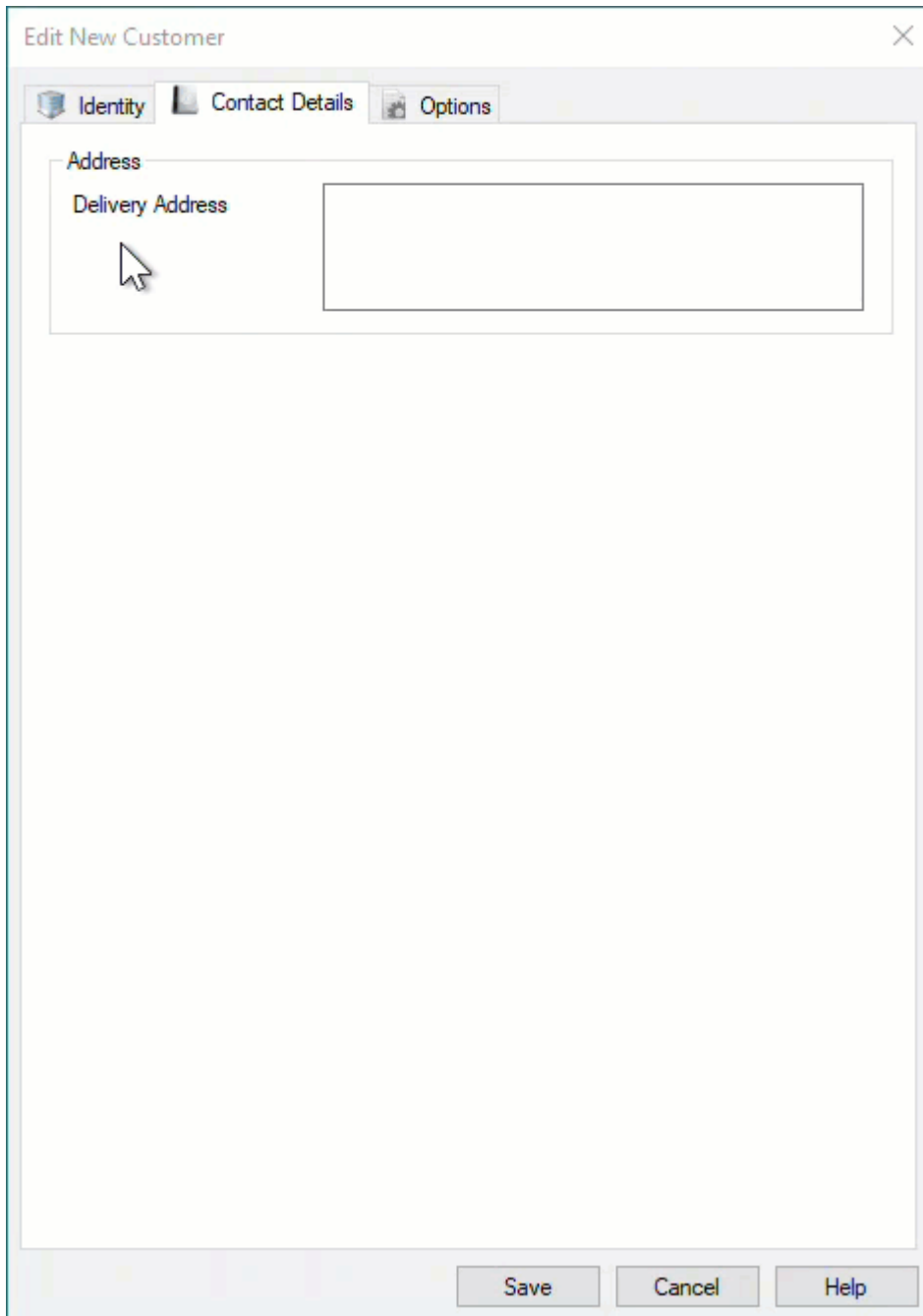
Enter the [Customer-ID](#) and a [Customer Description](#).

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 dialog box titled "Edit New Customer". It has three tabs: "Identity", "Contact Details", and "Options". The "Identity" tab is selected and contains a section titled "Customer Attributes". Within this section, there are two input fields: "Customer-ID" and "Customer Description". A mouse cursor is pointing at the "Customer Description" field. At the bottom of the dialog box, 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 dialog box titled "Edit New Customer" with a close button (X) in the top right corner. The dialog has three tabs: "Identity", "Contact Details", and "Options". The "Identity" tab is currently selected. Under the "Address" section, there is a "Delivery Address" label and a large empty text input field. A mouse cursor is positioned over the input field. At the bottom of the dialog, there are three buttons: "Save", "Cancel", and "Help".

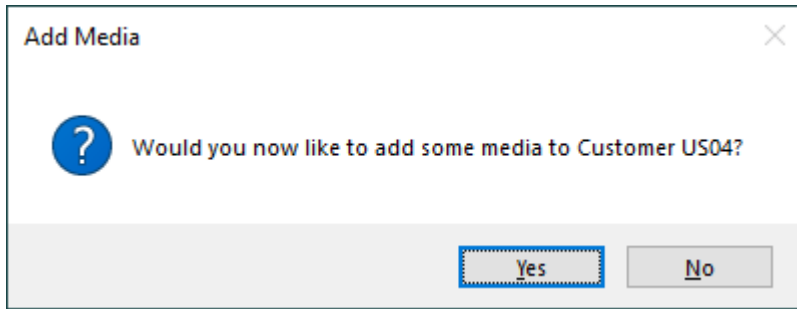
## Options

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.

Option	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	<Not Selected>

- **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).

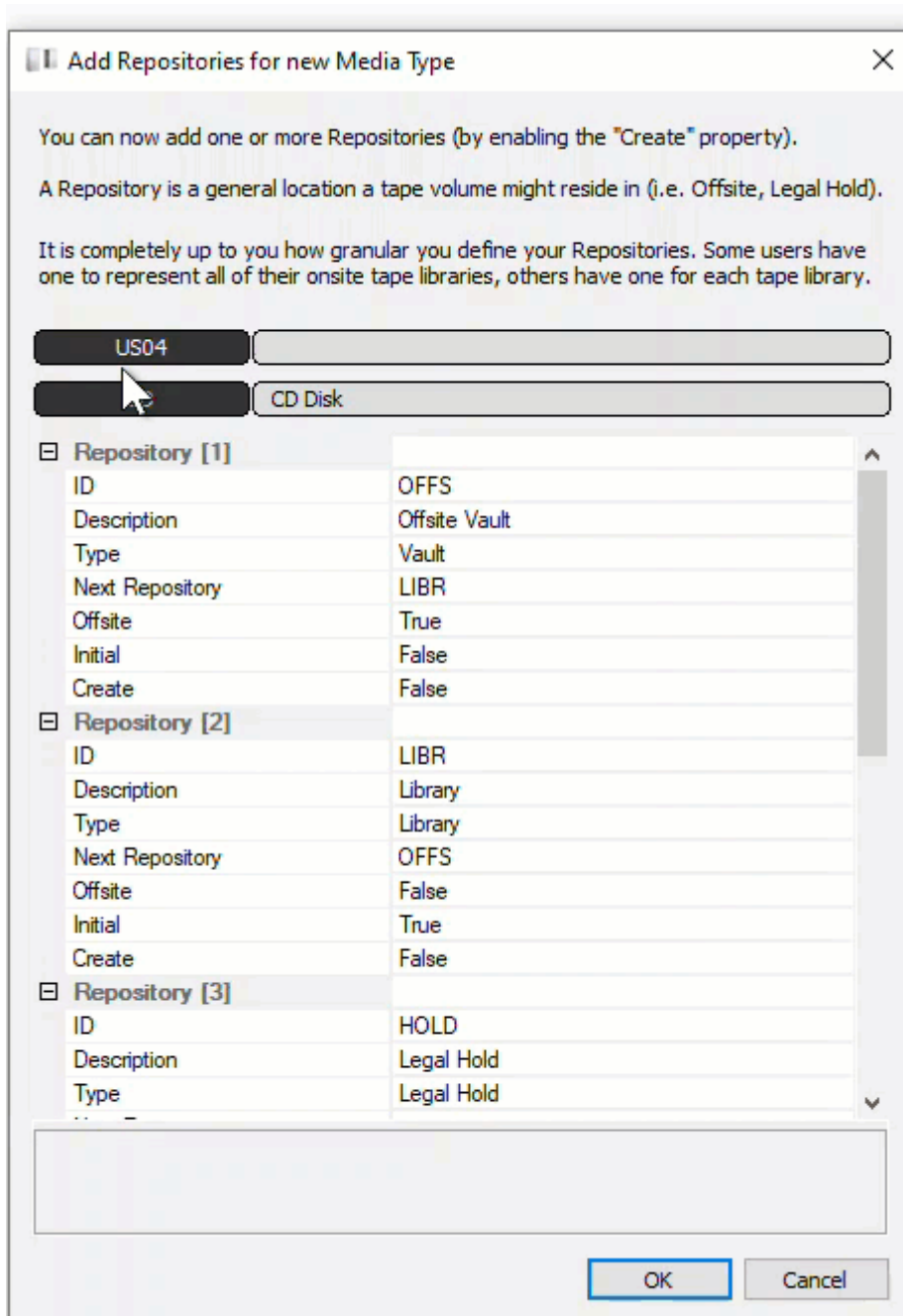
**US04**

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

OK Cancel

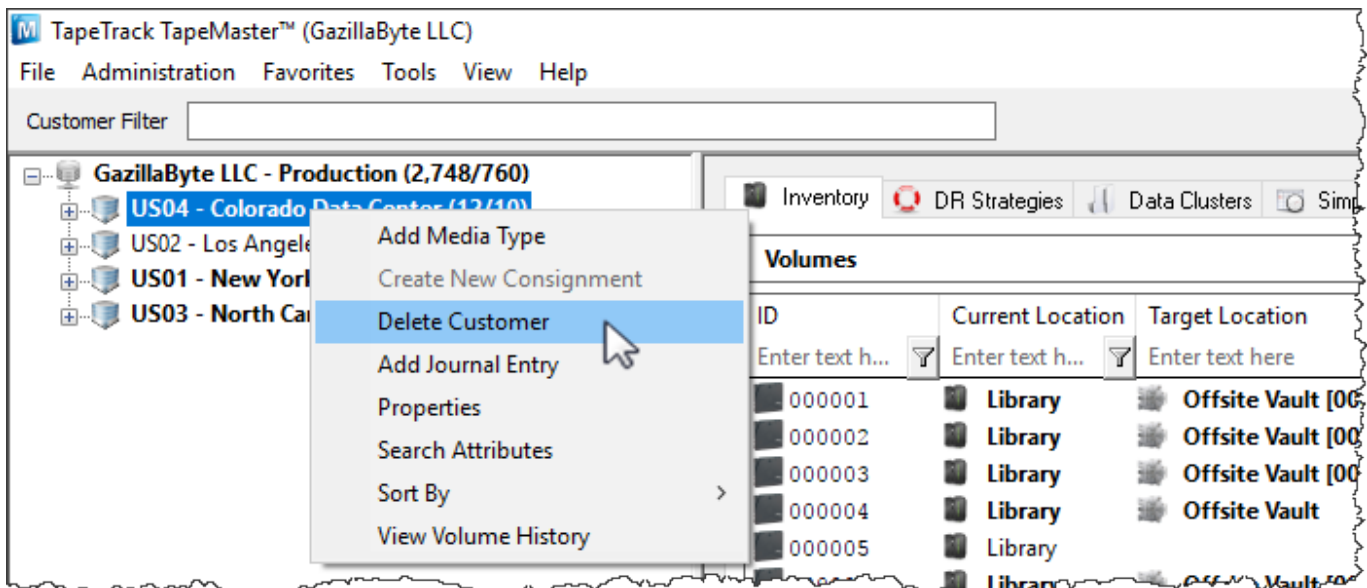
Click OK to continue.

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.

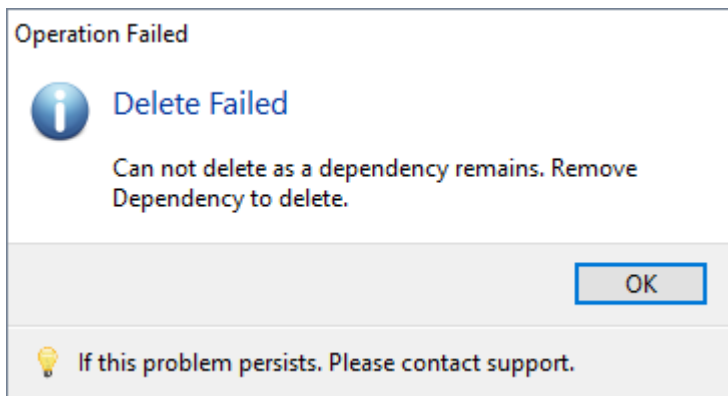


## Delete Customer

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**.

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

Permanent link:  
<https://rtfm.tapetrack.com/master/customer?rev=1625015623>

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

