

Adding and Maintaining Customers

A Customer is an owner of Volumes. This page details how to Add or Delete Customers.

Add Customer

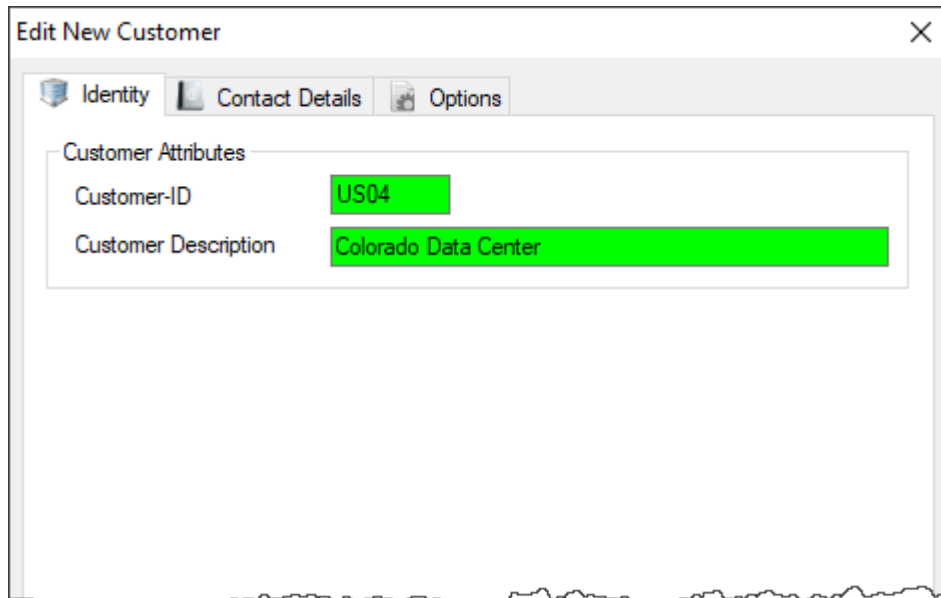
To add a Customer, right-click on the [Server Node](#) of the [Customer Tree](#) and select Add Customer.



This will launch a modified version of the Customer Properties Window.

Identity

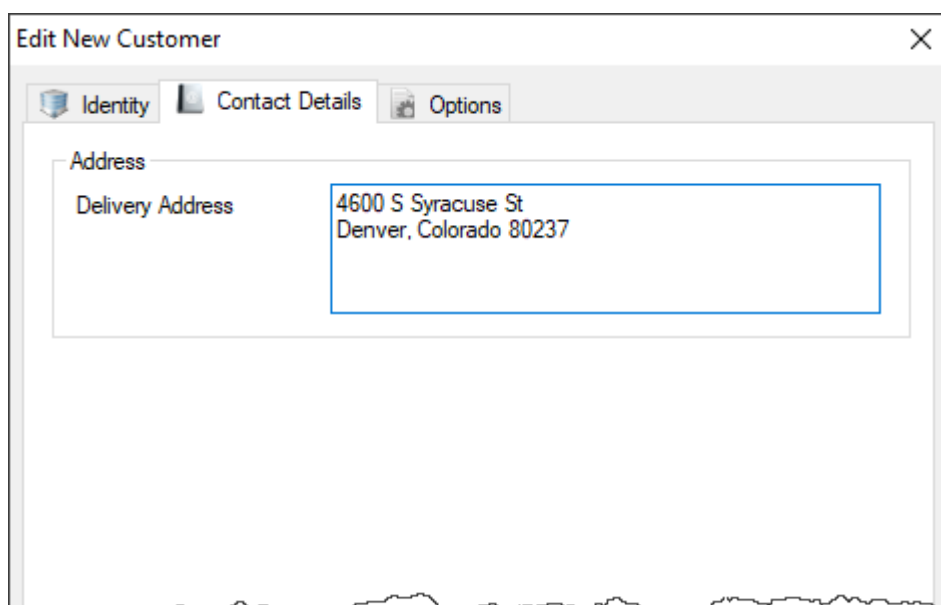
The first tab on the Add Customer window is the Identity tab. The Identity tab requires the input of a Customer-ID and a Customer Description. You can add up to four alphanumeric characters as the Customer-ID and up to forty alphanumeric characters for the Customer Description.



The screenshot shows the 'Edit New Customer' dialog box with the 'Identity' tab selected. The 'Customer Attributes' section contains two fields: 'Customer-ID' with the value 'US04' and 'Customer Description' with the value 'Colorado Data Center'. Both fields are highlighted in green.

Customer Attributes	
Customer-ID	US04
Customer Description	Colorado Data Center

The Contact Details tab provides a location for contact details for that customer.



The screenshot shows the 'Edit New Customer' dialog box with the 'Contact Details' tab selected. The 'Address' section contains a 'Delivery Address' field with the value '4600 S Syracuse St Denver, Colorado 80237'.

Address	
Delivery Address	4600 S Syracuse St Denver, Colorado 80237

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 and selecting Properties.

Edit Customer: 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	Description

- **Hide Customer** when set to true removes the customer from view in the master:customer_tree[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 master:customer[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.

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 may be edited to customize your values.

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 the relevant [repositories](#). Create relevant [repositories](#) by changing the Create option from False to True. Other fields may be edited to customize your 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]

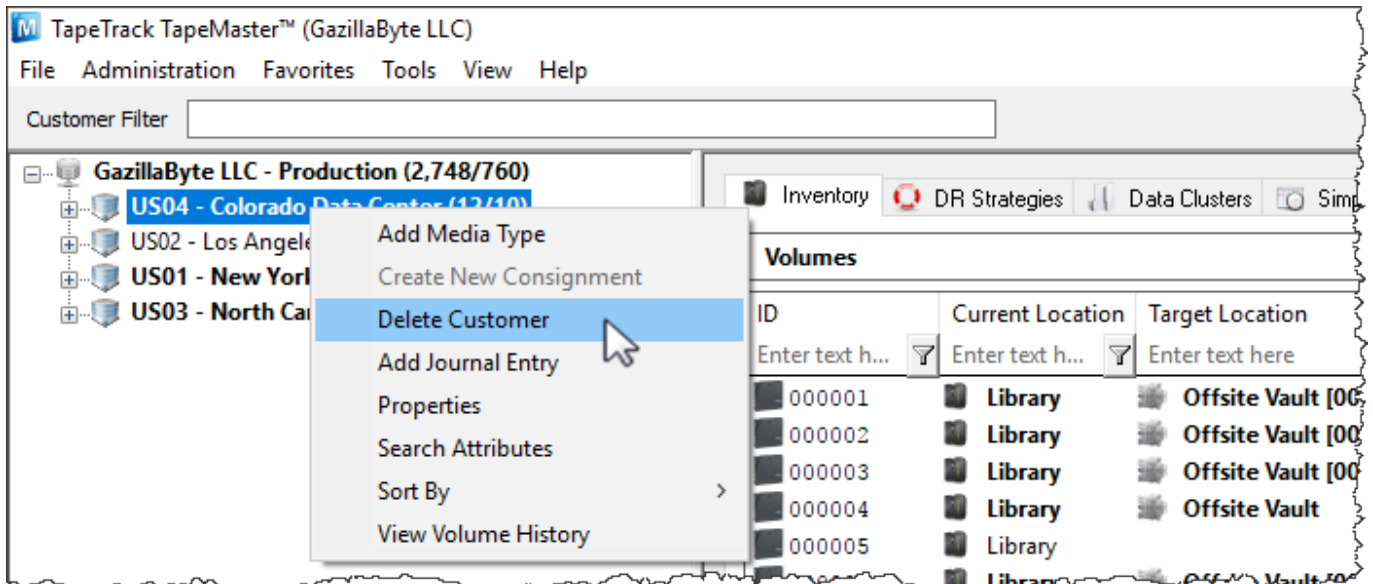
ID	OFFS
Description	Offsite Vault
Type	Vault
Next Repository	LIBR
Offsite	True
Initial	False
Create	True

Repository [2]

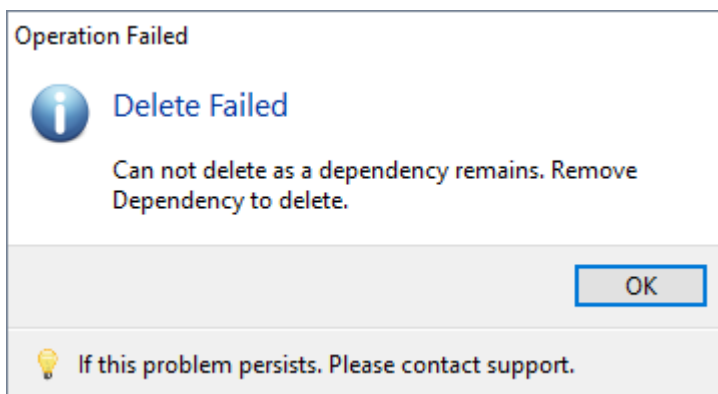
ID	
Description	
Type	
Next Repository	
Offsite	
Initial	
Create	

Delete Customer

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

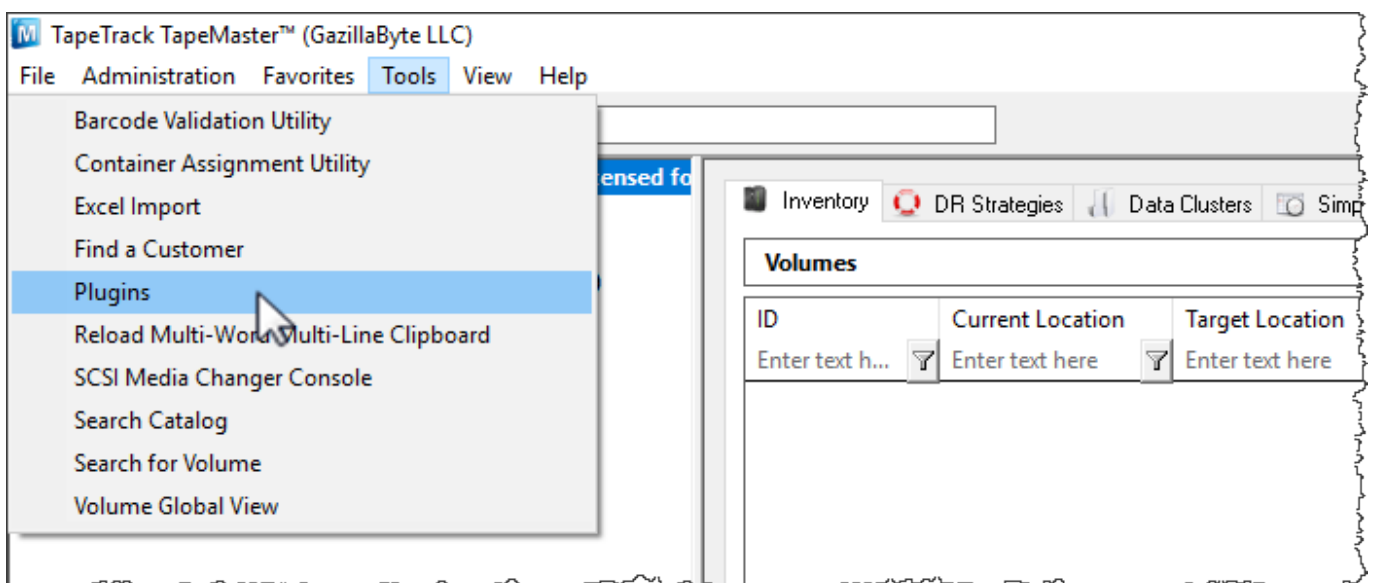


A customer may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).



If you receive this error, delete all [volumes](#), then all [repositories](#) and all [media types](#) before deleting [customer](#).

You can also delete customers (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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