

# Adding and Maintaining Customers

A [Customer](#) is an owner of [Volumes](#). This page details how to Add or Delete [Customers](#).

## Add Customer

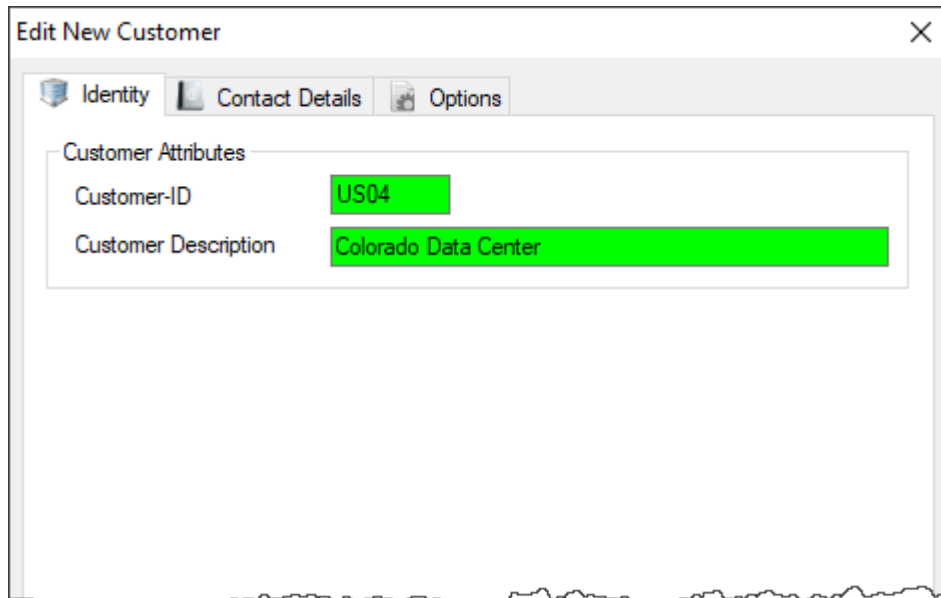
To add a [Customer](#), right-click on the [Server Node](#) of the [Customer Tree](#) and select Add Customer.



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 an optional (but recommended) [Customer Description](#). You can add up to four alphanumeric characters as the [Customer-ID](#) and up to forty alphanumeric characters for the [CustomerDescription](#). If no description is added, TapeMaster will display the [Customer-ID](#).

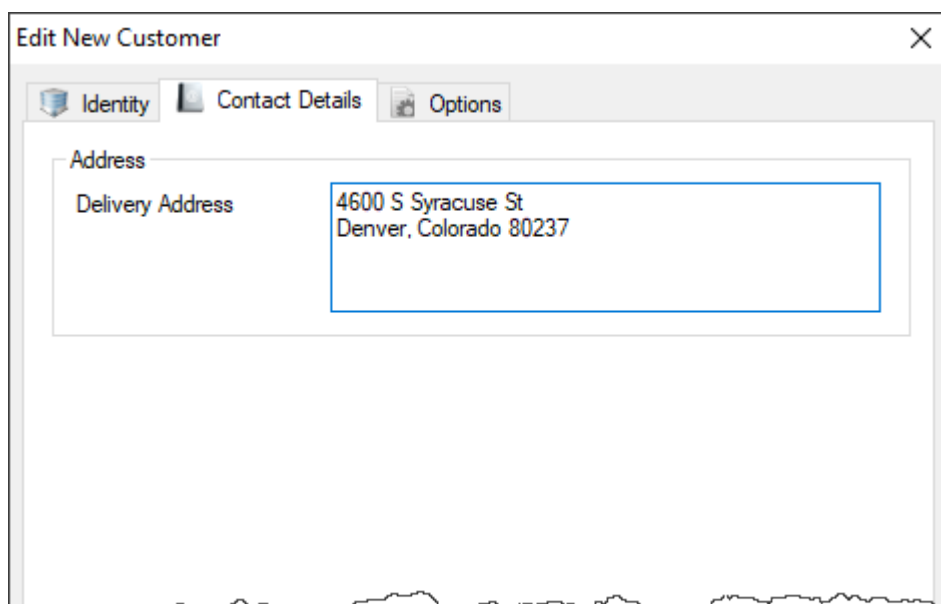


The screenshot shows the 'Edit New Customer' window with the 'Identity' tab selected. The 'Customer Attributes' section contains two fields: 'Customer-ID' with the value 'US04' and 'Customer Description' with the value 'Colorado Data Center'. Both fields are highlighted in green.

| Customer Attributes  |                      |
|----------------------|----------------------|
| Customer-ID          | US04                 |
| Customer Description | Colorado Data Center |

## Contact Details

The Contact Details tab provides a location for contact details for that [Customer](#).



The screenshot shows the 'Edit New Customer' window 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<br>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 [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 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

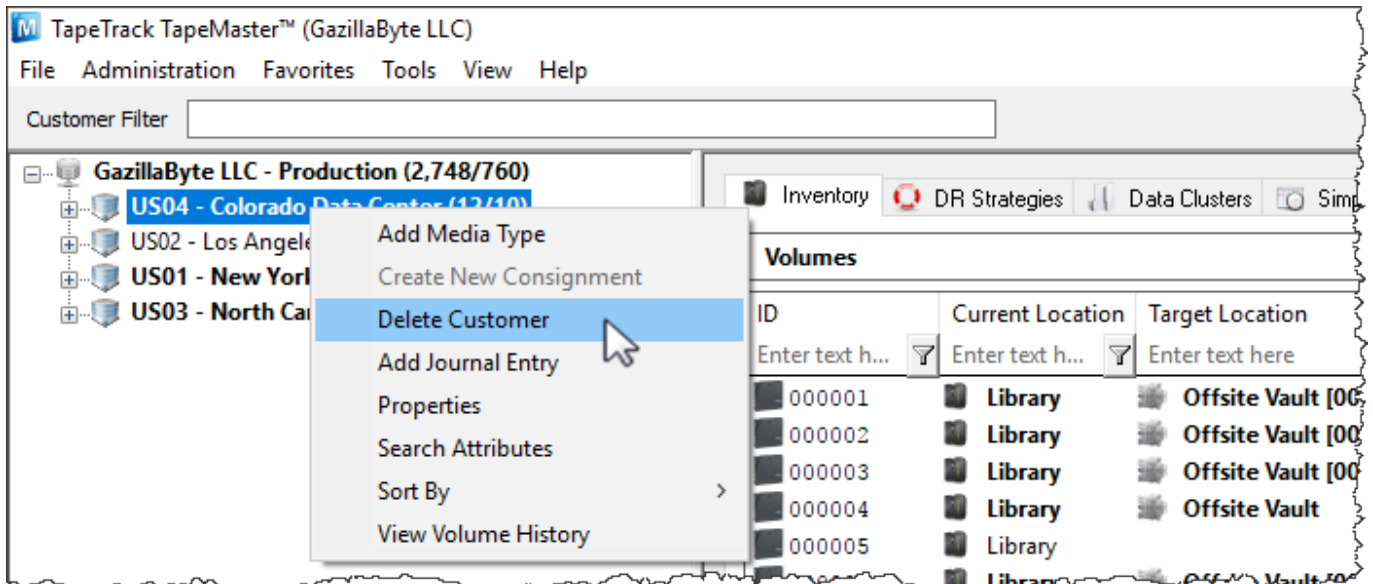
True

## Delete Customer

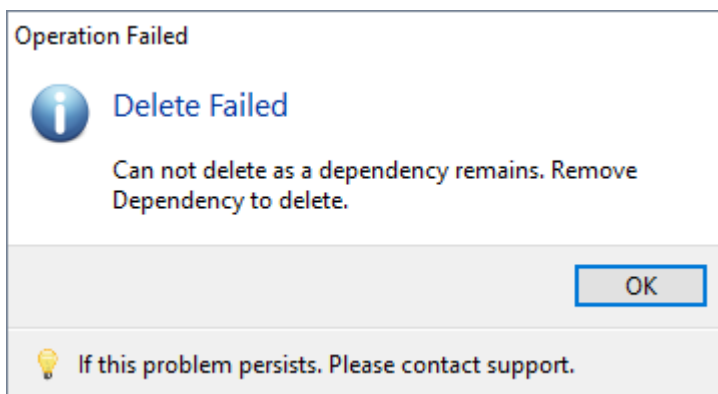
To delete a [Customer](#), right-click on the [Customer](#) in the Customer Tree and select Delete Customer.

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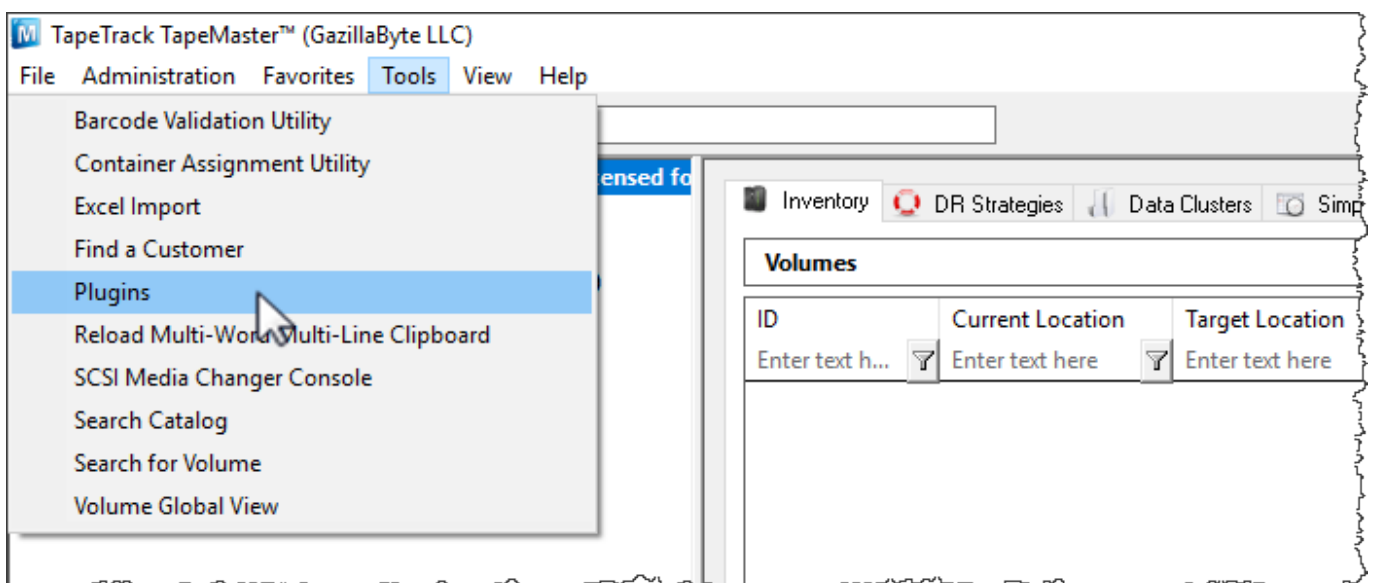


A [Customer](#) may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).



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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