Customer Description Map

The Customer Description Map file maps a TapeTrack Customer-ID to a readable Customer name, location, account name, or other billing description.

The map is used by TMSS10LogStatsProcess when processing TapeTrack statistics (.ttstats) files for billing.

The Customer Description Map allows the billing output to include the Customer description, such as `New York Data Center` instead of just US01.

The Customer Description Map does not define billing rates or determine which billing package applies to the Customer.

Purpose

The Customer Description Map provides a consistent relationship between the TapeTrack Customer-ID and the description required in billing reports or invoice output.

The file can be used to:

- Display a readable customer or location name in the billing output.
- Associate a TapeTrack Customer-ID with an accounting-system customer.
- Improve the readability of billing XML and reports.
- Prevent internal Customer-IDs from being used as customer-facing descriptions.
- Maintain consistent customer descriptions across billing periods.
- Assist with mapping TapeTrack billing data to QuickBooks Desktop.

File Location

The Customer Description Map can be stored in any directory accessible to the account running the billing process.

For ease of administration, it is recommended that all approved billing configuration files are stored in a dedicated directory.

Example Windows location:

```
C:\Program Files\TapeTrack\TapeTrack Framework
Server\etc\billing\customer.txt
```

Example Linux location:

```
/etc/tapetrack/billing/customer.txt
```

The location of the file is supplied to `TMSS10LogStatsProcess` using the `-M` argument.

File Format

The Customer Description Map is a plain-text file.

Each mapping contains:

- The TapeTrack Customer-ID on the left.
- The customer description on the right.

The general format is:

```
CUSTOMER-ID  Customer Description
```

Example:

Customer-ID	Customer Description
US01	New York Data Center
US02	Los Angelas Data Center

When a billing record contains Customer-ID `US01`, the billing processor can use the description `New York Data Center` in the resulting billing information.

The following example contains two TapeTrack Customers.

customer_map.txt

```
#
# TapeTrack Billing Customer Description Map
#
# Format:
# CUSTOMER-ID Customer Description
#

US01 New York Data Center
US02 Los Angeles Data Center
```

Lines beginning with a hash character (#) are comments and are ignored during processing.

Comments should be used to document:

- The purpose of the file.
- The expected mapping format.
- Any customer-specific mapping requirements.

Creating a New Mapping

Before adding a new Customer Description Map entry:

1. Confirm the TapeTrack Customer-ID.
2. Confirm the approved customer or location description.
3. Confirm the required QuickBooks customer name or identifier.
4. Check that the Customer-ID is not already mapped.
5. Add the new entry to the Customer Description Map.
6. Confirm that the Customer is also present in the Package Map.
7. Test the mapping with a sample `.ttstats` file.
8. Review the generated XML before using the mapping in production.

Example:

```
US04=Chicago
```

The Customer-ID in the map must match the Customer-ID stored in TapeTrack and contained in the `.ttstats` file.

Modifying an Existing Mapping

When changing an existing Customer Description Map entry:

1. Confirm that the change has been approved.
2. Make a backup copy of the current map file.
3. Update only the description on the right side of the mapping.
4. Do not change the TapeTrack Customer-ID unless the Customer-ID has also changed in TapeTrack.
5. Generate a test billing XML file.
6. Confirm the new description matches the corresponding QuickBooks customer.
7. Retain the previous file for audit and rollback purposes.

Example change:

```
Before:
US01=Los Angeles Data Centre

After:
US01=ACME Los Angeles
```

Changing a customer description does not change the statistics, billing package or billing rates. It changes the customer description used by the billing output.

Validation

The Customer Description Map should be validated before every production billing run.

Check that:

- Every billed Customer-ID has a corresponding map entry.
- No Customer-ID appears more than once.
- Customer descriptions are accurate and approved.
- Customer descriptions match the intended QuickBooks customer records.
- There are no unwanted spaces around the Customer-ID.
- The file contains no spelling errors.
- The file is readable by the billing service account.
- The correct version of the file is being used.
- Test billing XML contains the expected customer descriptions.

A validation table can be maintained for each billing run.

Check	Expected Result
Customer-ID exists in TapeTrack	Customer record is present.
Customer-ID exists in Customer Description Map	One mapping is present.
Customer-ID exists in Package Map	One billing package is assigned.
Customer description is approved	Description matches the billing profile.
QuickBooks customer exists	Mapping resolves to the intended QuickBooks customer.
Test XML is correct	Customer and item descriptions display as expected.

Troubleshooting

Customer Description Is Missing

Check that:

- The `-M` argument has been included.
- The specified Customer Description Map file exists.
- The billing account has permission to read the file.
- The Customer-ID is present in the map.
- The Customer-ID matches the value in the `.ttstats` file.
- The mapping does not contain an unwanted leading or trailing space.

Incorrect Customer Description

Confirm that:

- The correct Customer Description Map file was used.
- The Customer-ID is not duplicated.
- The mapping points to the intended customer.
- An old copy of the file is not being referenced by the billing script.
- The description matches the approved customer billing profile.

Incorrect QuickBooks Customer

The Customer Description Map may be correct while the XMLQuickBooks mapping is incorrect.

Check both mappings:

1. TapeTrack Customer-ID to billing description.
2. Billing description or Customer-ID to QuickBooks customer.

The Customer Description Map and XMLQuickBooks mapping are separate configuration stages. Updating one does not automatically update the other.

Recommended Practices

- Keep the file in a controlled billing configuration directory.
- Use one authoritative Customer Description Map for each billing environment.
- Do not maintain uncontrolled copies.
- Keep descriptions consistent with QuickBooks.
- Restrict write access to authorized billing administrators.

Security

The Customer Description Map does not normally contain passwords or authentication details. However, it may contain customer names and accounting identifiers.

Access should therefore be restricted to:

- TapeTrack administrators.
- Authorized billing staff.
- The service account that runs the billing process.

The file should not be publicly accessible or stored in an unsecured shared directory.

See Also

- TMSS10LogStatsProcess
- Adding and Maintaining Customers
- Customer-ID
- Package Map
- Billing Rules
- Billing Process
- XMLQuickBooks Mapping

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