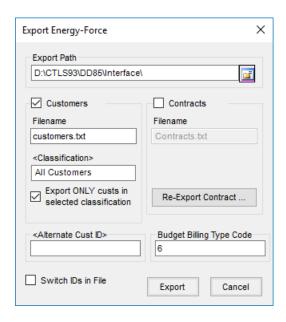
Energy Force Export File

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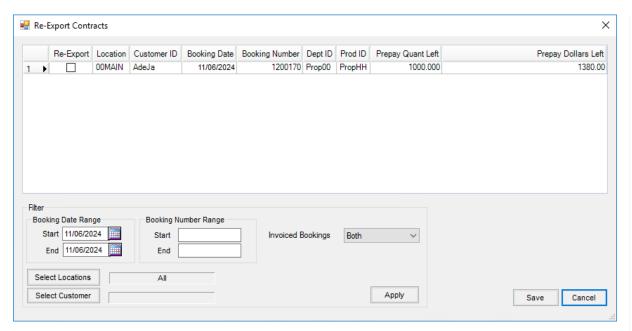
Create an export file of Customers and/or Contracts to import into Energy Force.

Setup

Go to Energy / Transfers / Exports / Energy Force. Select criteria to export on the Export Energy Force window.



- Select the Folder icon to browse for the Export Path. On the Browse For Folder screen, select Make New Folder or select a folder and choose OK.
- 2. When exporting Customers, check the *Customers* option, enter a *Filename* and double click the *Classifications* field to display the *Select Customer Classification* window. Highlight the classification and choose **Select**. Choose the option to *Export ONLY custs in selected classifications*, if applicable.
- 3. When exporting contracts, check the Contracts option and enter a Filename.
- 4. If re-exporting, select **Re-export Contracts** to display a grid. Filter by *Booking Date Range*, *Booking Number Range*, *Invoiced Bookings*, *Locations* and *Customers* and choose **Apply** to populate the grid. In the *Re-Export* column, select the checkbox of each booking to re-export and **Save** to return to the *Export Energy-Force* window.



- 5. Select the *Switch IDs in File* option to use Alternate Customer IDs when exporting both Customers and Contracts.
- 6. Choose Export.
- 7. Alternate Cust ID is only used when all or some Agvance IDs will not be valid in Energy Force or if in Energy Force IDs are over six characters. Energy Force does not accept letters and drops leading zeroes.
- 8. Budget Billing Type Code is found in Energy Force Maintenance Tables / Bill Types. Make sure to enter the Bill Type Set to Budget Billing, each company can be different.