Import Customer Process

Energy Force users who also use Agvance can update customers without running the export\import processes. The new program can run manually or with Automated Tasks. This process only brings in new, modified, or updated customers increasing efficiency.

Setup Steps

1. Two new system settings need to be created and both settings will need a category of *Customer Information* at *Main Menu / Maintenance Menu / Division Maintenance / System Settings*.

   a. AgvCustClass – Needs to have the Energy Force customer classification from Agvance set into the *Actual Value* field. If a classification is not entered then all customers from Agvance will be imported, if classifications are not used this can be left blank. In the example below the classification is *EF Customers*.

   b. ImportCustFromAgv – Set to *Y* in order to use this new method.

Category	Setting Name	Actual Value	
Customer Information	AgvCustClass	EF CUSTOMERS	
Customer Information	ImportCustFromAgv	Y	

2. The *AgvanceSqlDatabase* value has to exists in the *Secured Values*. Contact Support for assistance with *Secured Values*.

Using the Import Customers Button

1. An **Import Customers** button will display in the lower right corner of the Customer Maintenance screen in Energy Force for users with the DDB_Daily user right.
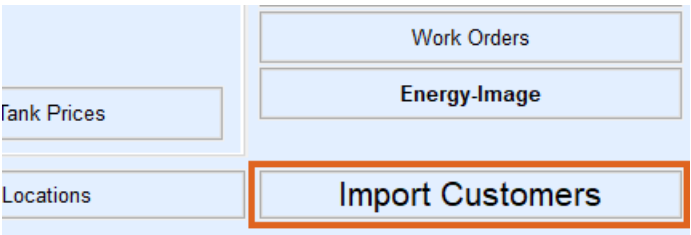
2. Select **Import Customers** to bring in new and modified customers from Agvance.

   a. The first time this process runs all customers within the classification specified in the *System Setting* table will import. Also, an entry will be created in the *Last Run Date Log* with the date and time processed.

   b. Future imports will compare the *Last Run Date* entry for the customer import and only import customers with a *Last Modified Date* and *Time* in Agvance greater than the ones stored in the *Last Run Date Log*.

   c. Each time **Import Customers** is processed the date and time will be updated in the log.

3. The *Customer Maintenance* screen will automatically refresh upon import completion.

4. Automated Tasks setup for the customer import looks at these system settings.
    1. If *ImportCustFromAgv* is present and set to *Y*, the new method runs.
    2. If *ImportCustFromAgv* is not present or set to *N*, then the process will still read from the text file in the *Interface* folder.
    3. No changes are needed to the Automated Tasks setup.
5. The **Import Customer Balances** button on the *Daily Clear Menu* still works, reading from a *customers.txt* file in the *Interface* folder and can be used, if necessary.
6. Agvance customers will be imported based on the saved *Export Energy Force* setup and the last modified time in Grower.

    Note: When *Switch ID's in File* is checked, the Customer Number is read from the *Alternate Cust ID* attribute identified.