Import Customer Process

Last Modified on 08/11/2025 2:54 pm CDT

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*.
 - 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.
 - 2. 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.

	Work Orders
Fank Prices	Energy-Image
Locations	Import Customers

- 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.
 - A log titled AgvCustImport_YYYYMMDD.csv is available for the new import in the CTLS93 / DD85 / Logs folder. The log will display if it was a new record (INSERT) or an update along with the

customer information. There will be one log per day and logs are deleted after 7 days.

MergeAction	CustomerNumber	Name 💌	FirstNa 😁	LastNa 💌	Contac -	Addres -	Addres •	City -	- State 💌	Zipcod *	BillTo 💌	Phone 💌	Phone(-	WorkPl -	WorkPl +	CreditLi -	Current -	_30Day -	_60Day -	_90Day -	TotalBa 🕶	SendSt: *	TermsC -
INSERT	14232	NEWFER,	JENNIFER	NEWFER	JENNIFER	NEWFER				0000	14232	2.32E+09	н		В	0	0	0	0	0	0	N	99
UPDATE	14233	TESTERSO	TEST	TESTERSO	TEST TEST	ADDRESS	LINE2	AVON	IN	3.33E+08	14233		н		В	0	0	0	0	0	0	N	99

- 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. Customers with blank *EF Alternate ID* attributes will not import to Energy Force.

Export Energy-Force	×
Export Path C:\CTLS93\DD85\	\Interface\
Customers	Contracts
Filename	Filename
customers.txt	
<classification></classification>	
Export ONLY custs in selected classification	Re-Export Contract
<alternate cust="" id=""> EF Alt ID</alternate>	Budget Billing Type Code
Switch IDs in File	Export Cancel

Auto Task Import Customers

Energy Force customers also using Agvance can setup the Import Customers process to run automatically located at Supervisor Menu / Maintenance Menu / Automated Tasks Menu / Background Tasks.

Note: The secured values and system settings from the Setup Steps tab are required for the automation setup as well.

To setup this new automated feature:

- 1. Select *CustomerSync* from the drop down.
- 2. Enter the Interval (Minutes) for how often to update the customer list.

- 3. Mark the task as Active.
- 4. All of the Date fields as well as the User Id field will fill in automatically.

ef Task Queue Setup			×
ld Type	^	All times listed here v	will be based off UTC time
0 CustomerSync		Create Date	07/22/2025 9:38:44 PM
		Start Date	07/22/2025 9:38:44 PM
		Complete Date	07/22/2025 9:38:44 PM
		Interval (Minutes)	30 2
		Next Scheduled Date	07/22/2025 10:08:44 PM
		User Id	Laura.Bejosano
	v	In Progress	Active 3
Cancel Dele	te	Save	Create

If a user opens the *Background Tasks* while a process is running the *In Progress* box will be checked. This process runs when there is a user logged into Energy Force. The *Next Scheduled Date* is based on the last completed date plus the *Interval (Minutes)*. New and updated customers with a last modified date and time in Agvance greater than the last *Complete Date* will import.

Note: It is recommend to remove the customers.txt from the *Interface* folder if using the new method to avoid pulling in old information.