

Import Customer Process

Last Modified on 05/01/2025 8:48 am 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

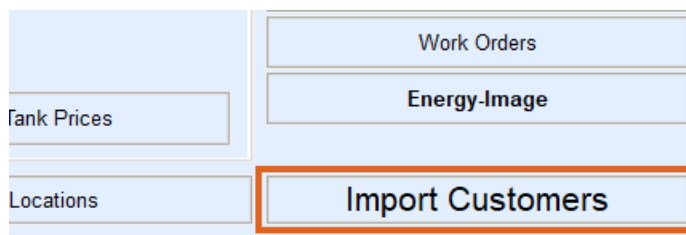
1. Two new system settings need to be created and both settings will need a category of *Customer Information* at *Main Menu / Maintenance Menu / Division Maintenance / System Settings*.
 - a. AgvCustClass – Needs to have the Energy Force customer classification from Agvance set into the *Actual Value* 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 exist 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.
 1. A log titled *AgvCustImport_YYYYMMDD.csv* is available for the new import in the *CTLS93 / DD85 /*

MergeAction	CustomerNumber	Name	FirstNa	LastNa	Contact	Address	Address	City	State	Zipcod	BillTo	Phone	PhoneC	WorkPl	WorkPl	CreditL	Current	_30Day	_60Day	_90Day	TotalB	SentSt	TermsC
INSERT		14232 NEWFER, JENNIFER	NEWFER	JENNIFER NEWFER						0000		14232 2.32E+09 H	B	B		0	0	0	0	0	0	N	99
UPDATE		14233 TESTERSO TEST	TESTERSO TEST	TEST ADDRESS LINE2				AVON IN		3.33E+08	14233	H	B			0	0	0	0	0	0	N	99

- 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.

Auto Task Import Customers

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.

Task Queue Setup

Id	Type
1	CustomerSync

All times listed here will be based off UTC time

Create Date: 04/22/2025 7:42:16 PM

Start Date: 04/23/2025 6:54:30 PM

Complete Date: 04/23/2025 6:54:30 PM

Interval (Minutes): 30

Next Scheduled Date: 04/23/2025 7:24:30 PM

User Id: Jennifer

☐ In Progress ☒ Active

Close Delete Modify 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.