

Import Customer Process

Last Modified on 02/05/2026 8:55 am CST

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 system settings will need updated at *Supervisor Menu / Set Up Options / Agvance Setup Menu / Agvance Preferences*. The *API Settings*, also found in the *Agvance Setup Menu*, will need filled in as well.

The screenshot displays the 'Agvance Setup Menu' with three options: 'Agvance Setup Menu', 'Agvance Preferences', and 'Api Setup'. The 'Api Setup' option is highlighted with an orange border. Below this, a dialog box titled 'Agvance Api Maintenance' is shown. It contains four input fields: 'Agvance Api Base Url:', 'Agvance Api User ID:', 'Agvance Api Password:', and 'Agvance Api Database ID:'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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

Uniqueld	TheKey	TheText	TheNumber
1	IMPORT CUSTOMERS FROM AGVANCE	Y	0
2	CUSTOMER CLASSIFICATION TO IMPORT	EF CUST CLASS	0
3	EXPORT TANKS TO AGVANCE	Y	0
4	EXPORT TANKS TO AGVANCE BY ALT ID	N	0

Modify Exit

2. **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 above the classification is *EF Customers*.
3. Update the Energy Force user role of *Allow_AgvApiSetup* to *Allow_AgvSetup*. This role determines if the **Agvance Setup Menu** button is enabled.
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.

Tank Prices

Locations

Work Orders

Energy-Image

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*.

- [illegible]

- 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

All times listed here will be based off UTC time

Id	Type
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

Next Scheduled Date: 07/22/2025 10:08:44 PM

User Id: Laura.Bejosano

☐ In Progress ☒ Active

Buttons: Cancel, Delete, Save, Create

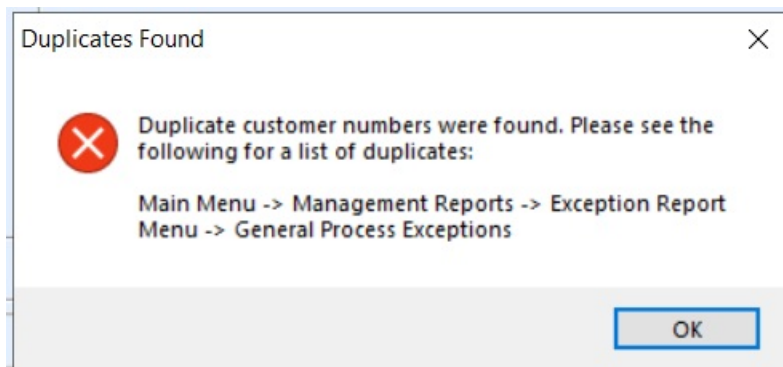
If a user opens the *Background Tasks* while a process is running the *In Progress* box will be checked. This process runs when there is a user logged into Energy Force. The *Next Scheduled Date* is based on the last completed date plus the *Interval (Minutes)*. New and updated customers with a last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

Customer Import Error

Customer Sync for mutual Agvance and Energy Force users will receive the error message shown below identifying duplicates have been found caused by customers with leading zero Customer Numbers.

Agvance allows the entry of leading zeros which would be seen as two different Customer ID's. However, when the customer was transferred over to Energy Force, *Customer Number* is a number field and the leading zeros would be trimmed off causing an error in the sync due to a duplicate Customer Number.



For example, Customer 123 and Customer 0123 are both listed on the import. The leading zeros are dropped when importing into Energy Force, therefore, these accounts would both try to import as Customer Number 123.

Customers will not import, and the *Last Run Date* log will not be updated. The duplicate customers will be listed in the *Full Exception* box on the *General Process Exceptions* report at *Management Reports / Exception Report Menu*. Agvance Customer Name, Agvance Customer Number, and the number to import will be listed. Once the duplicate customer is resolved, the exception can be marked as *Reviewed* and will continue to sort with the most recent exception listed first.

