

Energy Force Export

Last Modified on 11/06/2024 10:41 am EST

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.

The screenshot shows the 'Export Energy-Force' dialog box. It has a title bar with a close button. The main area is divided into two columns. The left column is for 'Customers' and is active, indicated by a checked checkbox. It contains a text box for 'Export Path' with the value 'D:\CTLS93\DD85\Interface\'. Below it is a 'Filename' text box with 'customers.txt'. A dropdown menu for '<Classification>' shows 'All Customers'. There is a checked checkbox for 'Export ONLY custs in selected classification'. Below that is another text box for '<Alternate Cust ID>' which is empty. At the bottom left is an unchecked checkbox for 'Switch IDs in File'. The right column is for 'Contracts' and is inactive, indicated by an unchecked checkbox. It has a 'Filename' text box with 'Contracts.txt'. Below it is a button labeled 'Re-Export Contract ...'. At the bottom right are 'Export' and 'Cancel' buttons.

1. 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.

Re-Export Contracts

| | Re-Export | Location | Customer ID | Booking Date | Booking Number | Dept ID | Prod ID | Prepay Quant Left | Prepay Dollars Left |
|---|--------------------------|----------|-------------|--------------|----------------|---------|---------|-------------------|---------------------|
| 1 | <input type="checkbox"/> | 00MAIN | AdeJa | 11/06/2024 | 1200170 | Prop00 | PropHH | 1000.000 | 1380.00 |

Filter

Booking Date Range

Start: 11/06/2024

End: 11/06/2024

Booking Number Range

Start:

End:

Invoiced Bookings: Both

Select Locations: All

Select Customer:

Apply

Save Cancel

5. Select the *Switch IDs in File* option to use Alternate Customer IDs when exporting both Customers and Contracts.

6. Choose **Export**.