

Energy Force Export File

Last Modified on 03/10/2025 2:36 pm EDT

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 with the following settings:

- Export Path:** D:\CTLS93\DD85\Interface\
- Customers:** Customers
- Contracts:** Contracts
- Filename (Customers):** customers.txt
- Filename (Contracts):** Contracts.txt
- <Classification> (Customers):** All Customers
- Export ONLY custs in selected classification:**
- Re-Export Contract ...:** Button
- <Alternate Cust ID>:** (Empty)
- Budget Billing Type Code:** 6
- Switch IDs in File:**
- Buttons:** Export, Cancel

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

End

Booking Number Range

Start

End

Invoiced Bookings

Select Locations

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**.
7. *Alternate Cust ID* is only used when all or some Agvance IDs will not be valid in Energy Force or if in Energy Force IDs are over six characters. Energy Force does not accept letters and drops leading zeroes.
8. *Budget Billing Type Code* is found in *Energy Force Maintenance Tables / Bill Types*. Make sure to enter the *Bill Type Set* to *Budget Billing*, each company can be different.