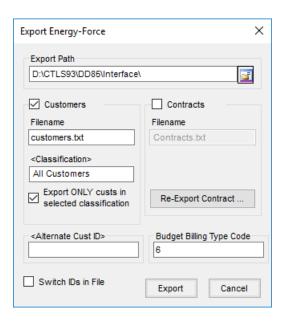
Energy Force Export

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

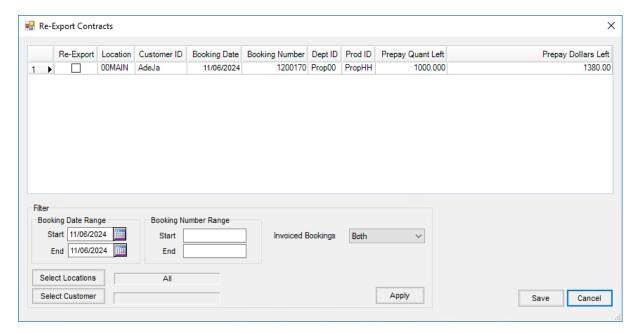
Create an export file of Customers and/or Contracts to import into Energy Force.

Setup

Go to Energy / Transfers / Exports / Energy Force. Select criteria to export on the Export Energy Force window.



- 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.



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