

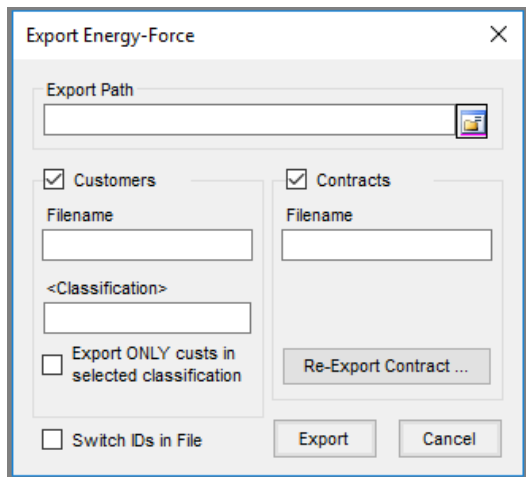
Energy Force Export

Last Modified on 10/31/2023 4:10 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.



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	11/27/2019	1200170	Prop00	PropHH	1000.000	1380.00

Filter

Booking Date Range

Start: 08/01/2019

End: 11/27/2019

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**.