

# Import Customer Process

Last Modified on 02/05/2026 9:55 am EST

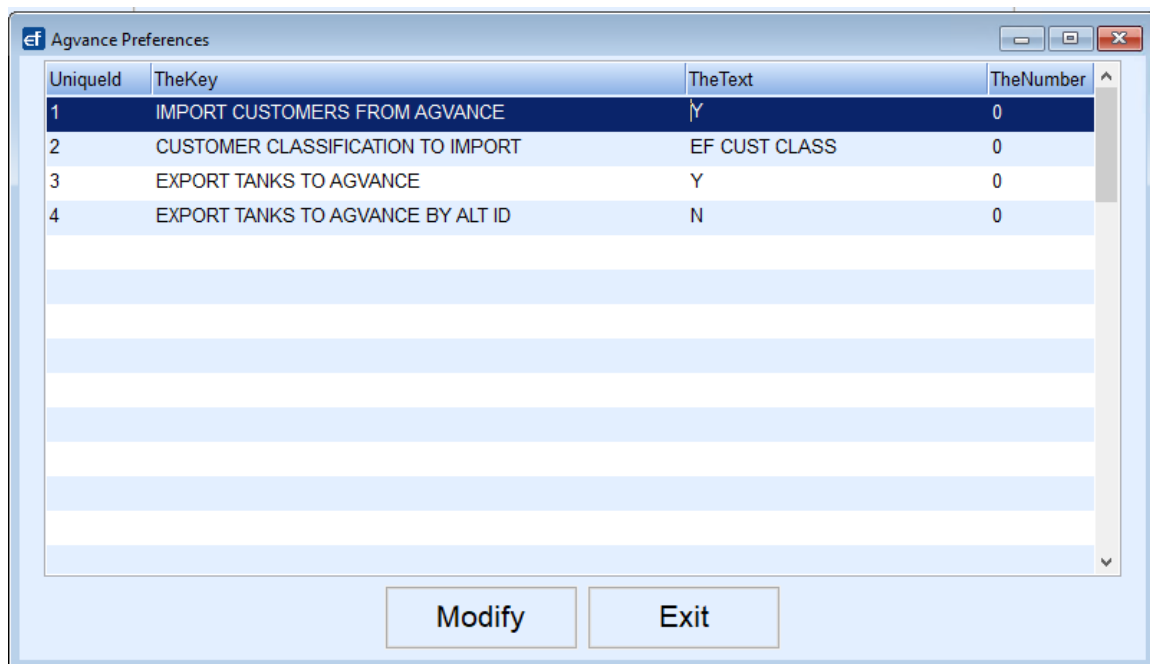
Energy Force users who also use Agvance can update customers without running the export\import processes. The new program can run manually or with Automated Tasks. This process only brings in new, modified, or updated customers increasing efficiency.

## 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 image shows a screenshot of the 'Agvance Setup Menu' interface. It contains three buttons: 'Agvance Setup Menu', 'Agvance Preferences', and 'Api Setup'. The 'Api Setup' button is highlighted with an orange border. Below these buttons is a dialog box titled 'Agvance Api Maintenance'. The dialog box has 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 box are 'Save' and 'Cancel' buttons.

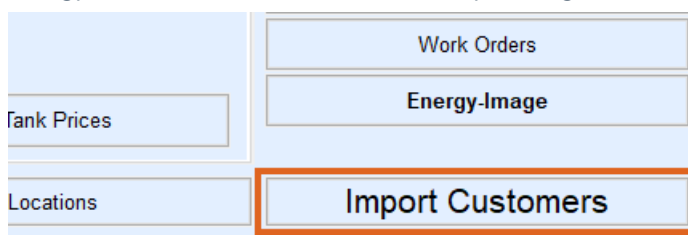
1. **ImportCustFromAgv** – Set to Y in order to use this new method.



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.



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*.
  - c. Each time **Import Customers** is processed the date and time will be updated in the log.
    - A log titled *AgvCustImport\_YYYYMMDD.csv* is available for the new import in the *CTL593 / DD85 /*

MergeAction	CustomerNumber	Name	FirstNa	LastNa	Contact	Address	Address	City	State	Zipcod	BilTo	Phone	PhoneC	WorkPl	WorkPl	CreditL	Current	_30day	_60day	_90day	TotalB	SendSt	TermsC
INSERT	14232 NEWFER,	JENNIFER	NEWFER	JENNIFER	NEWFER					0000		14232	2.32E+09	H	B		0	0	0	0	0	N	99
UPDATE	14233 TESTERSO TEST	TESTERSO TEST	TESTERSO TEST	ADDRESS LINE2	AVON	IN				3.33E+08		14233	H	B		0	0	0	0	0	0	N	99

- 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.

Export Energy-Force

Export Path  
C:\CTLS93\DD85\Interface\

☒ Customers  
Filename  
customers.txt  
<Classification>  
☐ Export ONLY custs in selected classification

☐ Contracts  
Filename  
Re-Export Contract ...

<Alternate Cust ID>  
EF Alt ID

☒ Switch IDs in File

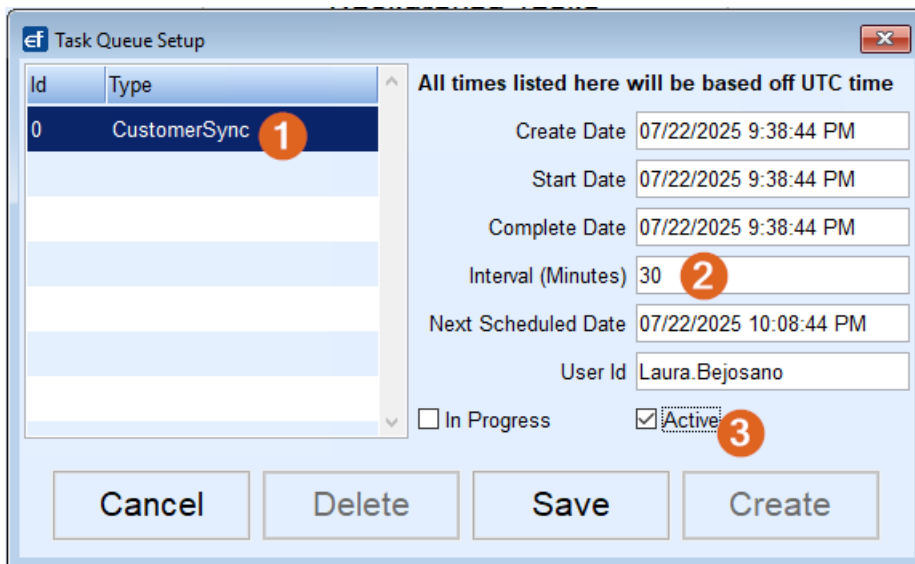
Budget Billing Type Code  
2

Export Cancel

Energy Force customers also using Agvance can setup the Import Customers process to run automatically located at *Supervisor Menu / Maintenance Menu / Automated Tasks Menu / Background Tasks*.

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.



The 'Task Queue Setup' dialog box contains a table with columns 'Id' and 'Type'. The first row has '0' in the 'Id' column and 'CustomerSync' in the 'Type' column, with a red circle '1' next to it. To the right of the table, there is a section titled 'All times listed here will be based off UTC time' containing several input fields: '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, with a red circle '2' next to it), 'Next Scheduled Date' (07/22/2025 10:08:44 PM), and 'User Id' (Laura.Bejosano). Below these fields are two checkboxes: 'In Progress' (unchecked) and 'Active' (checked, with a red circle '3' next to it). At the bottom are four buttons: 'Cancel', 'Delete', 'Save', and 'Create'.

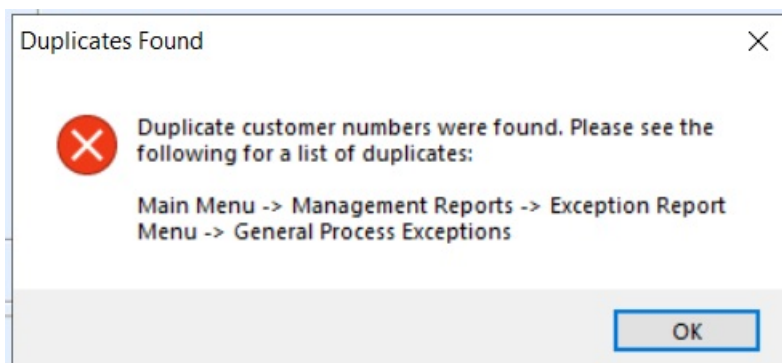
If a user opens the *Background Tasks* while a process is running the *In Progress* box will be checked. This process runs when there is a user logged into Energy Force. The *Next Scheduled Date* is based on the last completed date plus the *Interval (Minutes)*. New and updated customers with a last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

ef

General Process Exceptions

ID	Type	Error	DateTime	Reviewed
22	General	Agv Customer Import: duplicate customer found in Agvance	12/30/2025 8:42:43 PM	<input checked="" type="checkbox"/>
21	General	Agv Customer Import: duplicate customer found in Agvance	12/29/2025 8:04:45 PM	<input type="checkbox"/>
20	General	Agv Customer Import: duplicate customer found in Agvance	12/29/2025 8:02:28 PM	<input type="checkbox"/>
19	General	Agv Customer Import: duplicate customer found in Agvance	12/29/2025 7:57:03 PM	<input type="checkbox"/>
18	General	Agv Customer Import: duplicate customer found in Agvance	12/18/2025 3:05:14 PM	<input type="checkbox"/>
17	General	Agv Customer Import: duplicate customer found in Agvance	12/18/2025 2:16:11 PM	<input type="checkbox"/>
16	General	Agv Customer Import: duplicate customer found in Agvance	12/17/2025 4:01:07 PM	<input type="checkbox"/>
15	General	Agv Customer Import: duplicate customer found in Agvance	12/17/2025 3:52:50 PM	<input type="checkbox"/>
14	General	Agv Customer Import: duplicate customer found in Agvance	12/17/2025 3:47:01 PM	<input type="checkbox"/>
13	SqlException	Agv Customer Import: failed to import customers	12/17/2025 1:53:17 PM	<input type="checkbox"/>
12	IOException	Agv Tank Svnc: Could not access log file	12/15/2025 3:15:50 PM	<input type="checkbox"/>

☐ Include Reviewed

Full Exception

Additional Info

Agv Name: Jennifer Newfer - Number From Agv: 723 - Number To Import: 723  
Agv Name: Craig Innes - Number From Agv: 00723 - Number To Import: 723  
Agv Name: Dwight Sargent - Number From Agv: 1212 - Number To Import: 1212  
Agv Name: Josselyn Newfer - Number From Agv: 01212 - Number To Import: 1212

Update

Close