



3. The *Customer Maintenance* screen will automatically refresh upon import completion.
4. Automated Tasks setup for the customer import looks at these system settings.
  1. If *ImportCustFromAgv* is present and set to Y, the new method runs.
  2. If *ImportCustFromAgv* is not present or set to N, then the process will still read from the text file in the *Interface* folder.
  3. No changes are needed to the Automated Tasks setup.
5. The **Import Customer Balances** button on the *Daily Clear Menu* still works, reading from a *customers.txt* file in the *Interface* folder and can be used, if necessary.
6. Agvance customers will be imported based on the saved *Export Energy Force* setup and the last modified time in Grower.

**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.

The screenshot shows the 'Export Energy-Force' dialog box. The 'Export Path' is 'C:\CTLS93\DD85\Interface\'. The 'Customers' checkbox is checked, and the 'Filename' is 'customers.txt'. The '<Alternate Cust ID>' field is highlighted with a red box and contains 'EF Alt ID'. The 'Switch IDs in File' checkbox is also checked. The 'Budget Billing Type Code' is set to '2'. There are 'Export' and 'Cancel' buttons at the bottom.

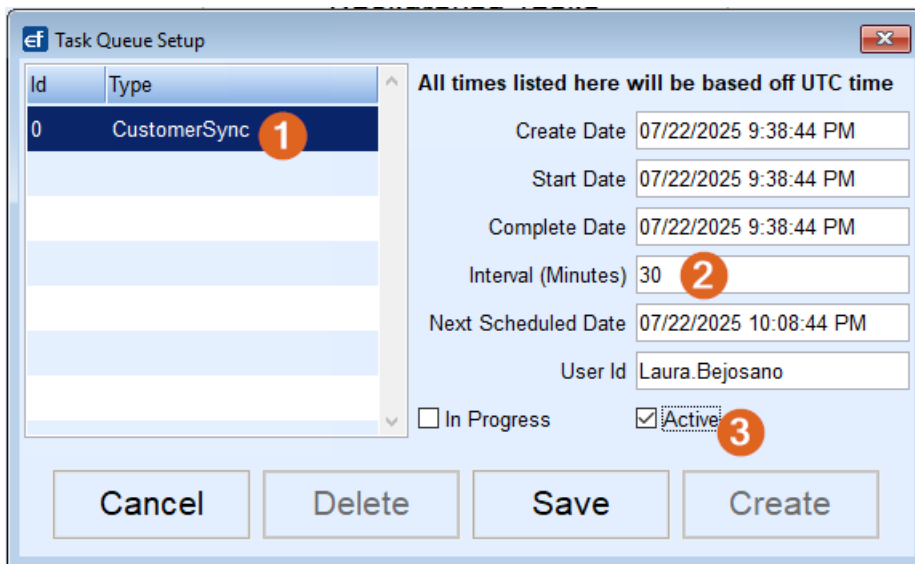
## Auto Task Import Customers

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*.

**Note:** The secured values and system settings from the Setup Steps tab are required for the automation setup as well.

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 image shows a 'Task Queue Setup' dialog box. On the left is 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 containing the number '1' next to it. To the right of the table, there is a note: 'All times listed here will be based off UTC time'. Below this note are 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 containing the number '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 containing the number '3' next to it). At the bottom of the dialog are four buttons: 'Cancel', 'Delete', 'Save', and 'Create'.

Id	Type
0	CustomerSync

All times listed here will be based off UTC time

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

Next Scheduled Date: 07/22/2025 10:08:44 PM

User Id: Laura.Bejosano

☐ In Progress ☒ Active

Buttons: Cancel, Delete, Save, 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.