

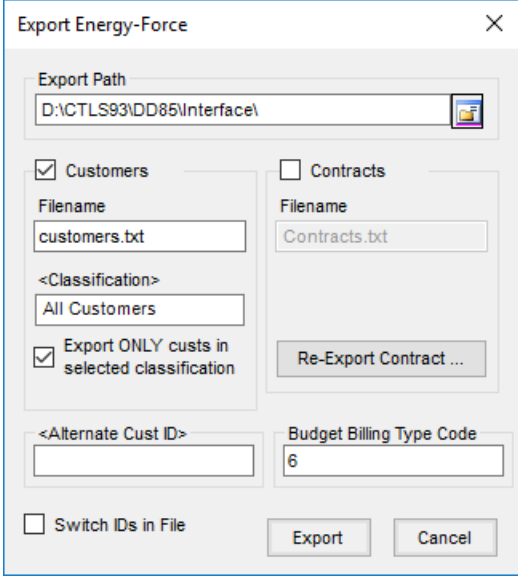
# Energy Force Export

Last Modified on 11/06/2024 9:41 am CST

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. The 'Export Path' is set to 'D:\CTLS93\DD85\Interface\'. The 'Customers' checkbox is checked, and the 'Contracts' checkbox is unchecked. The 'Filename' for Customers is 'customers.txt' and for Contracts is 'Contracts.txt'. The '<Classification>' field is set to 'All Customers'. The 'Export ONLY custs in selected classification' checkbox is checked. There is a 'Re-Export Contract ...' button. The '<Alternate Cust ID>' field is empty, and the 'Budget Billing Type Code' is '6'. The 'Switch IDs in File' checkbox is unchecked. 'Export' and 'Cancel' buttons are at the bottom.

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: 11/06/2024

End: 11/06/2024

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**.