

Directions on Scheduling Appointment King Reports

The following instructions will guide you through automating the exchange of data from your Daxko system into Appointment King.

The first step is to create a user in your Daxko system named "Appointment King" and define the email address for that user as integration@appointmentking.com. Then, be certain to login as the Appointment King user BEFORE you Subscribe to the Report Schedule described below so that the reports can be automatically sent to Appointment King.

After completing the above:

- In Daxko Operations, click on the Daxko Operations system menu and select Custom Reports
- In Global Reports, select the report folder titled "Other". In the list of reports, you will see 3 reports beginning with AppointmentKing. Check next to each of these reports and click on Copy.

Personal Reports | Shared Reports | All Reports | Global Reports

Global Reports > Other

Copy Find Reports

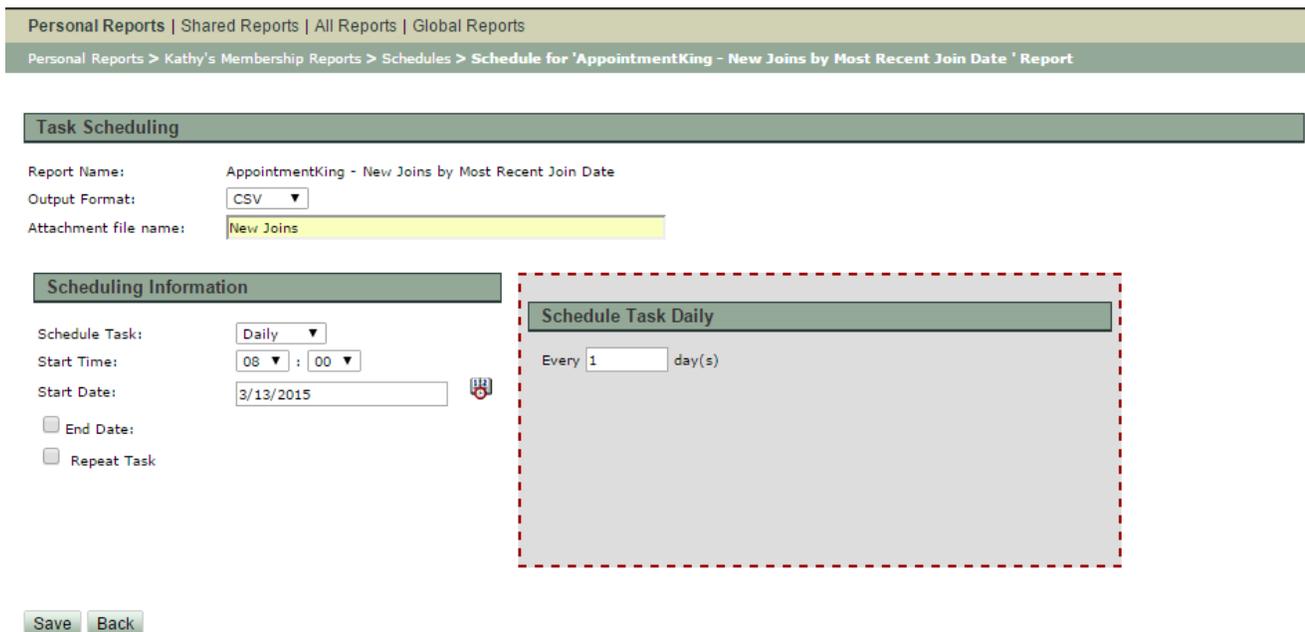
<input type="checkbox"/>	Name	Last Modified	Actions
<input checked="" type="checkbox"/>	AppointmentKing - New Joins by Most Recent Join Date	5/13/2015 12:18 PM	
<input checked="" type="checkbox"/>	AppointmentKing - Terminated Members	5/13/2015 12:19 PM	
<input checked="" type="checkbox"/>	AppointmentKing - Total Existing Members	5/13/2015 12:20 PM	
<input type="checkbox"/>	Duplicate Credit Card and EFT Account Finder Use this report to find duplicate billing methods being used on separate units.	7/31/2012 2:55 PM	
<input type="checkbox"/>	Organization Contact Information Table includes all Organizations with address, phone, fax, website, contact name, and contact phone.	9/23/2011 1:57 PM	
<input type="checkbox"/>	Organization Notes This list Organization name, note type, and the description of each note	7/23/2013 3:35 PM	
<input type="checkbox"/>	Raptor Scan File Provide this as a CSV file to to Raptor Technologies for sex offending screening.	10/5/2012 9:56 AM	
<input type="checkbox"/>	Shout - Program Counts	6/20/2012 7:54 AM	

- Copy the reports into your Shared or Personal Reports Folder.
- Locate the report in the folder you saved them in

- Next to the report, click on the arrow under actions and select Schedule
Be certain you've logged as the Appointment King user BEFORE you subscribe so that the reports are sent to the email address for the Appointment King user.
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- Click Add



- Under Task Scheduling, select the Output Format: CSV
- Name the Appropriate File Using the Following Convention:
 - When naming your **New Joins** file:
 - "add_Your Appointment King Integration Key.csv" (not including quotes)
 - Sample Name: add_22WnjtRuVI18uuR3eoexHhaUZi2t.csv
 - When naming your **Cancellation** file:
 - "cancel_Your Appointment King Integration Key.csv" (not including quotes)
 - Sample Name: cancel_22WnjtRuVI18uuR3eoexHhaUZi2t.csv
- Under Scheduling Information, Schedule the Task to run Daily at a specified time.
- Select a Start Date as determined by Appointment King staff
- Click Save



- Check next to the schedule you just created and click the Arrow under Actions and select Change Subscription

<input type="checkbox"/>	Frequency	Schedule	Actions
<input checked="" type="checkbox"/>	 Daily	At 8:00 AM every day Last Run Time: Never Next Run Time: 3/14/2015 8:00:00 AM	 Modify Schedule Change Subscription

- Click Subscribe

Report Name: AppointmentKing - New Joins by Most Recent Join Date
Frequency: Daily
Schedule: At 8:00 AM every day
Last Run: Never
Next Run: 6/18/2015 8:00:00 AM
Subscriber's Email Address: KCannon@firstcoastymca.org