

# Directions on Scheduling Appointment King Reports

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

The first step is to create a user in your Trinexum system named "Appointment King" and define the email address for that user as [integration@appointmentking.com](mailto: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 Trinexum, click on Reports > Better Decisions > Ad Hoc Reporting
- In Shared Reports, select the report folder titled "Appointment King". In the folder, 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

All Reports > Appointment King ?

Database:

<input type="checkbox"/>	Name	Owner	Folder Type	Last Modified	Actions
<input checked="" type="checkbox"/>	 AppointmentKing - New Joins by Most Recent Join Date	netvent	Personal Reports	6/10/2015 7:05 AM	
<input checked="" type="checkbox"/>	 AppointmentKing - Terminated Members	netvent	Personal Reports	6/10/2015 7:05 AM	
<input checked="" type="checkbox"/>	 AppointmentKing - Total Existing Members	netvent	Personal Reports	6/10/2015 7:05 AM	

- Copy the reports into your Shared or Personal Reports Folder.
- Locate the report in the folder you saved it in
- Next to the report, click on the arrow under actions and select Schedule  
Be certain to login as the Appointment King user **BEFORE** you Subscribe so that the reports are sent to the Appointment King email address.

- Click Add

[Personal Reports](#) | [Shared Reports](#) | [All Reports](#) | [Global Reports](#)

[All Reports](#) > [Appointment King](#) > [Schedules for 'AppointmentKing - New Joins by Most Recent Join Date' Report](#) ?

No schedules were found for this report.

**Add**

[Back to Reports List](#)

- 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

[Personal Reports](#) | [Shared Reports](#) | [All Reports](#) | [Global Reports](#)

[All Reports](#) > [Appointment King](#) > [Schedules](#) > [Schedule for 'AppointmentKing - New Joins by Most Recent Join Date' Report](#) ?

**Task Scheduling**

Report Name: AppointmentKing - New Joins by Most Recent Join Date

Output Format:

Add to Archive:

Attachment file name:

**Scheduling Information**

Schedule Task:

Start Time:  :

Start Date:

End Date:

Repeat Task

**Schedule Task Daily**

Every  day(s)

**Save** [Back](#)

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

Personal Reports | Shared Reports | **All Reports** | Global Reports

All Reports > Appointment King > Schedules for 'AppointmentKing - New Joins by Most Recent Join Date' Report <sup>?</sup>

Add Delete

<input type="checkbox"/>	Frequency	Schedule	Actions
<input checked="" type="checkbox"/>	Daily	At 8:00 AM every day Last Run Time: Never Next Run Time: 6/11/2015 8:00:00 AM	<a href="#">Modify Schedule</a> <a href="#">Change Subscription</a>

Back to Reports List

- Click Subscribe

Personal Reports | Shared Reports | **All Reports** | Global Reports

All Reports > Appointment King > Schedules > Subscribe to Report 'AppointmentKing - New Joins by Most Recent Join Date' <sup>?</sup>

Report Name: AppointmentKing - New Joins by Most Recent Join Date  
 Frequency: Daily  
 Schedule: At 8:00 AM every day  
 Last Run: Never  
 Next Run: 6/11/2015 8:00:00 AM

Subscribe / Unsubscribe Users

Subscribe Unsubscribe

	Email	Is Subscribed
Click to subscribe to the report and return to the schedule list.		