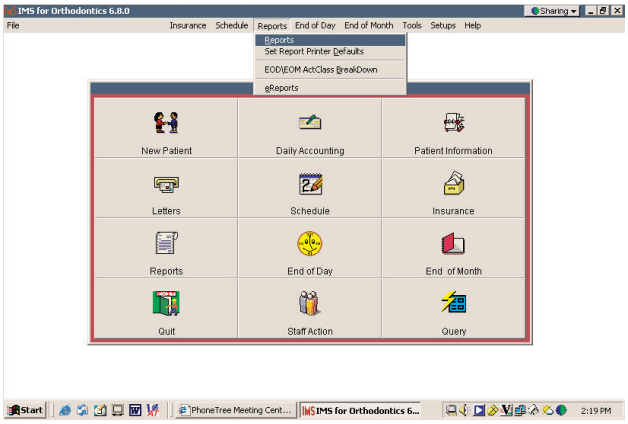
Site # _____

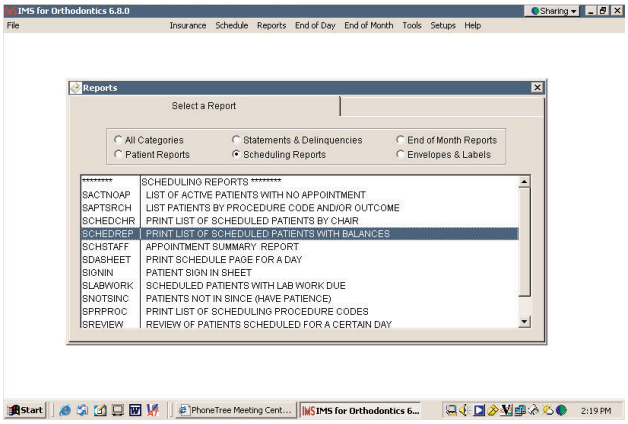
Getting Data From Your Practice Management System

IMS: Appointments

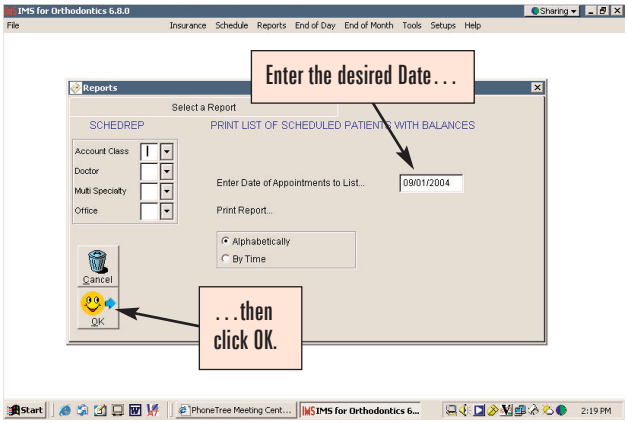
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. Once configured, each day PhoneTree will read this file and use it to make calls. Here's how to do this using the IMS system:



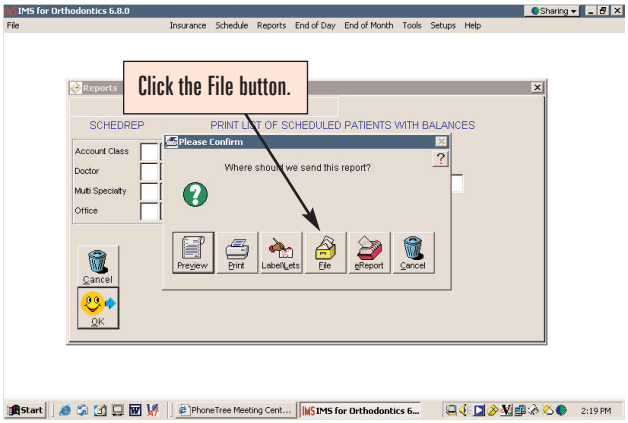
1. Open IMS to the main screen. From the **Reports** menu, choose **Reports.**



2. A new **Reports** window opens. Choose **Scheduling Reports** at the top, then locate **SCHEDREP** from the list of reports and double-click on it.



3. Enter the date for which you'd like to call next to **Enter Date of Appointments to List**, then click **OK**.



4. On this **Please Confirm** dialog, click the **File** button.

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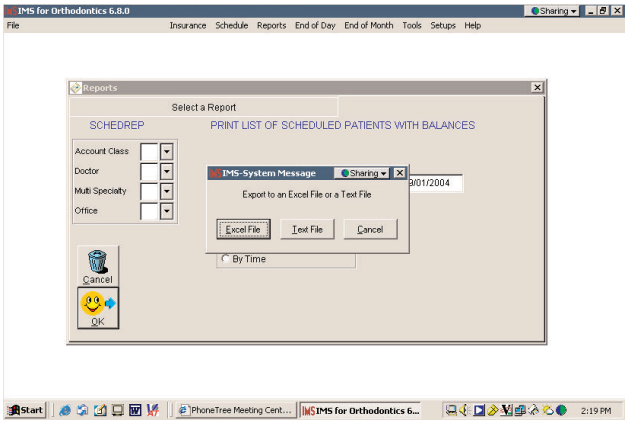
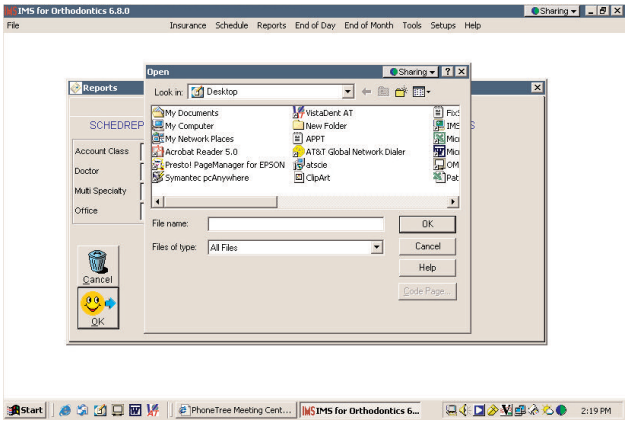
Getting Data From Your Practice Management System, continued



5. Click the button labeled **Excel File**.



6. You will now be asked where you want to save this file. Direct the file to the **Desktop** and name it **PTAppts** then click the **OK** button. This step creates the file and you will now be able to locate it on the desktop of your computer. Congratulations–you're done!

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