



Appointment Exporter/Upload Instructions

We recommend running the exporter for the Appointment Reminders and upload the file at least once a day; preferably shortly before the start of your preferred call time range, to maximize call reminder accuracy.

Step 1: Run Exporter to create file (Required Each Time)

From your desktop...

- a) Double-click '**Patient Reminder Exporter**' shortcut icon on the desktop
- b) Go to **File** → **Open**
- c) You should be brought right to your '**PRM**' folder, but if not click the '**PRM**' folder at the top
- d) Select the "**PatientReminderApptExport.px2**" file and click **Open**
- e) Next to the **ScheduleStartDate** field, replace the date with today's date (*unless otherwise specified by STI Staff*)
- f) At the bottom of the screen, sign in using the same **User Name** and **Password** that you use for Practice Manager or Clinical
- g) Click the '**Run Now**' button on the bottom right, to create the file
- h) Once the exporter finishes creating the file, a popup window will come up saying "**Export Complete**", click '**OK**'
- i) The "**PatientReminderReport.txt**" file is defaulted to save in a folder on your server, but I put a shortcut to it on your desktop

Step 2: Upload the File

Using Internet Explorer, or any web browser...

- a) Go to the address line and go to Talksoft's Website: www.talksoftonline.com
- b) Click on '**Customer Login**' at the top right and enter your **email** and **password** to log in, (*previously emailed to you from STI's Technical Support*)
- c) On the left hand side in the '**RemindMe**' section, click on '**Upload File**'
- d) Click **Browse/Choose file** and go to the desktop, then choose the file '**Patient Reminder File Shortcut**' folder, then double click the file you created: '**PatientReminderReport.txt**'
- e) Click **Open** to select
- f) Then click **Upload** to send the file, you should get a confirmation message on the screen
- g) To confirm you have uploaded properly, wait a minute and click on '**Transmissions**' on the left under the **RemindMe** section
- h) If successful, the correct time and date of your uploaded file will appear at the top of the list and will say '**Complete**' and the number of '**Records Processed**' will be greater than zero
- i) Be sure to search the **Activity Report** for reminder results and Have a Great Day! 😊