

# Exporting Appointments from Acuity

Last edited 6/10/24

*It's best to do this on a laptop/computer with Excel.*

**Step 1:** Log into [Acuity](#) to export the schedule for the day. You will sort it, save it into a CSV file for each tax site to use during the day.

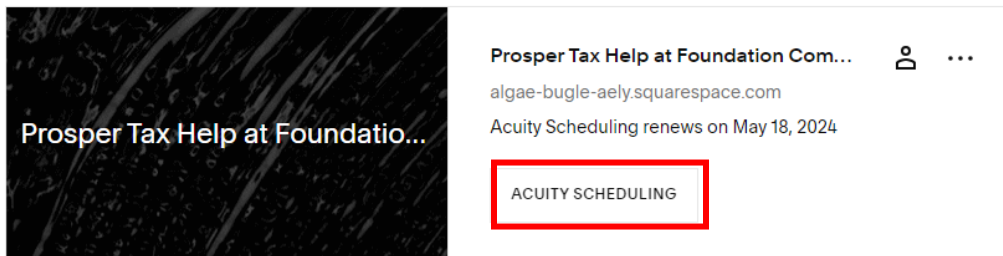
## Tax Staff Login Credentials:

User: ProsperTaxHelp@gmail.com

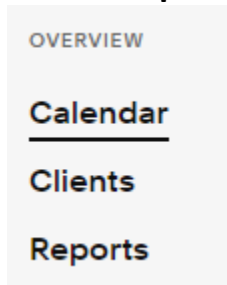
Password: GabyRocks#1!

**Step 2:** Once logged into Acuity, click on Acuity Scheduling.

Dashboard



**Step 3:** Click on the Reports tab from the left side menu.



**Step 4:** Select today's date, and check the first and third boxes called "Blank Name." Then select "Export Appointments."

Export to Spreadsheet (.csv)

Date from  to  ?

Include canceled appointments

Forms:

Blank Name ←

Blank Name

Blank Name ←

Blank Name

Only appointments with these forms will be included in the export.

This will download the appointments for all tax sites for the day. You will sort the spreadsheet per tax site.

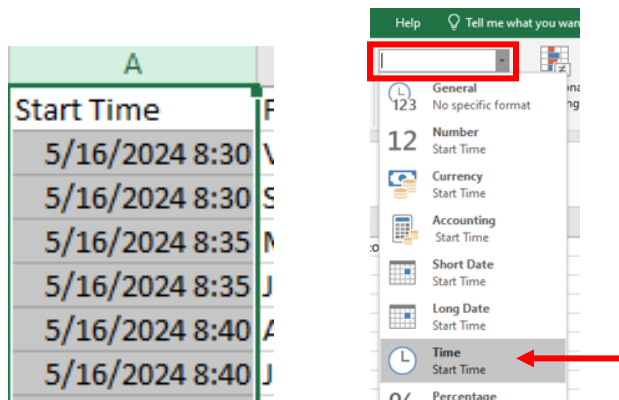
**Step 5: Delete these columns:** First expand all columns. Use the keyboard shortcut **Ctrl+A** to select all cells, then **Alt+H+O+I** to autofit the column width.

To delete the following columns, select each column, right-click, select Delete.

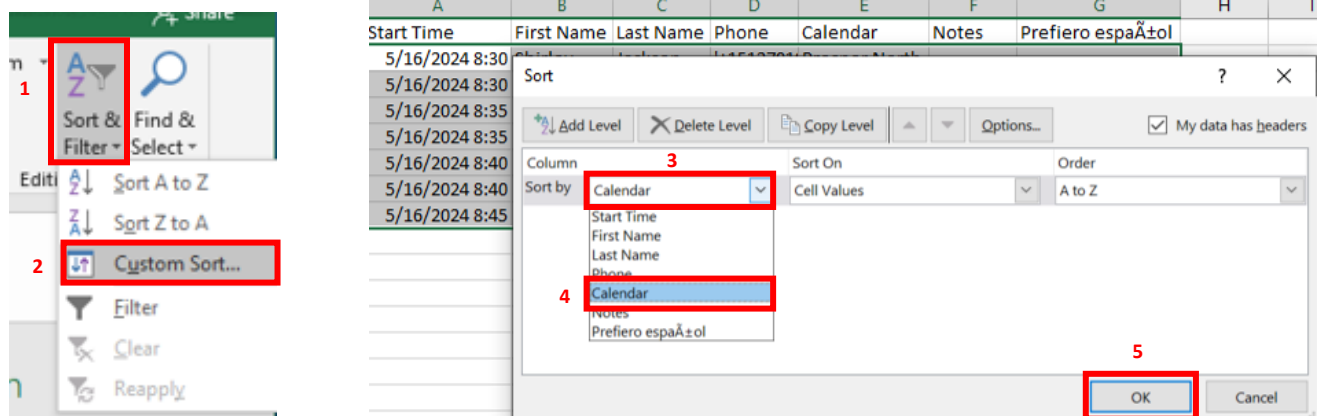
End time; Email; Type; Appointment Price; Paid?; Amount Paid Online; Certificate Code; Date Scheduled; Label; Scheduled By; Date Rescheduled; STOP: These appointments are reserved...; Prefiero los formularios en espaÑ±ol; Requesting Certified Deaf Interpreter (CDI)...; Appointment ID.

**You will only need to work with these columns:** Start Time; First Name; Last Name; Phone; Calendar; Notes; Prefiero espaÑ±ol

**Step 6:** Select all the cells in the Start Time column. Locate the Format Cells dropdown shortcut, and change the cell format to Time. This will remove the date and leave only the time of the appointment.

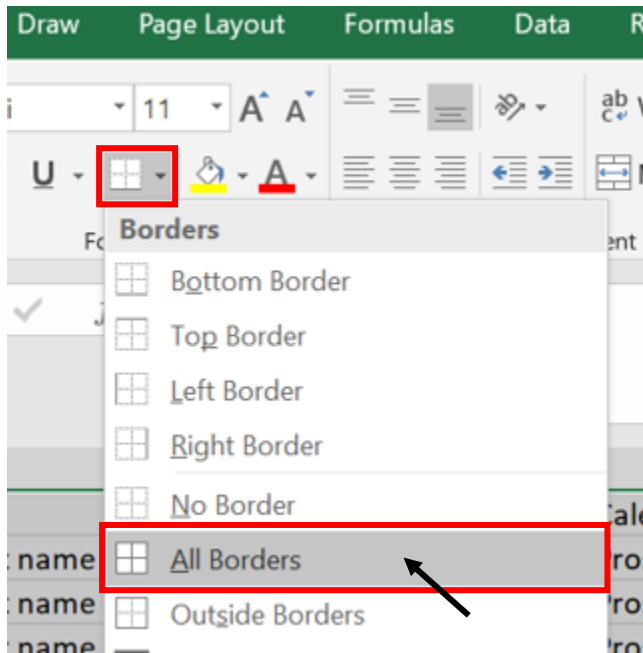


**Step 7:** Click Sort & Filter, then select Custom Sort... (from the Home tab in the upper right) and sort by Calendar. Make sure you have selected just one cell versus still having all cells in column A selected.

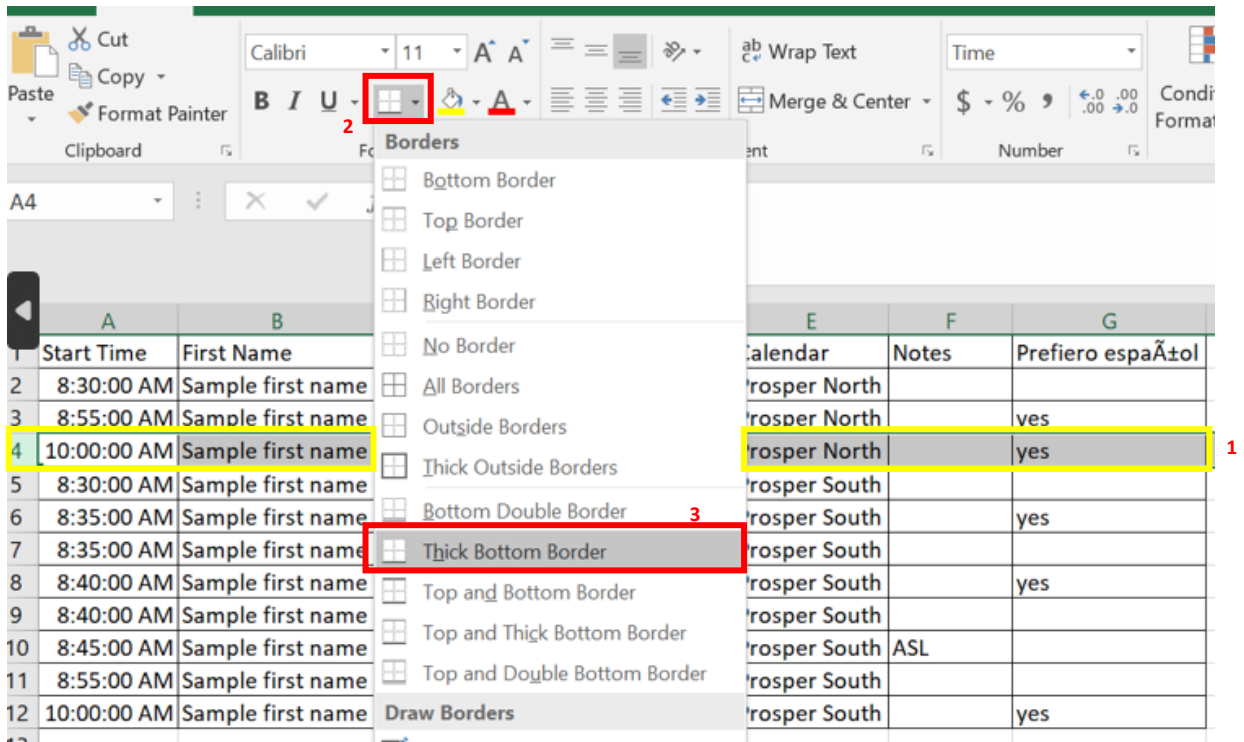


1. Sort & Filter
2. Custom Sort
3. Click on the *Sort By* drop down list
4. Select “Calendar”
5. Click, “Ok”

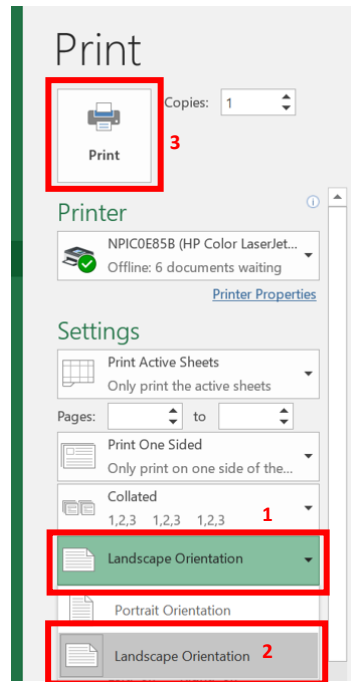
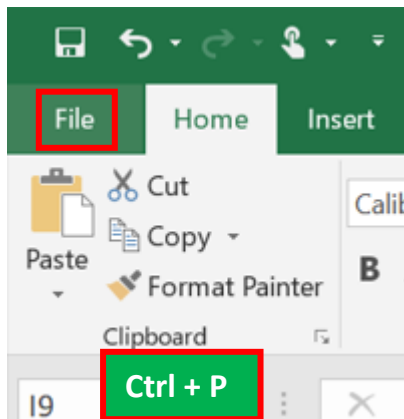
**Step 8: Prep excel sheet for printing.** Highlight all cells with content in them and click on the icon for Borders. Select “All Borders.” This will add borders to every cell and help us read the schedule more easily.



Select the last Prosper North appointment row, click on the icon for Borders, and then select the “Thick Bottom Border”. This will add a thick bottom border to help separate and read the North vs. South schedules more easily.



**Step 9: Print the sorted schedule.** You can either click on File → Print, or use shortcut key Ctrl + P.



From the Print menu, you will change the report to *Landscape Orientation*. Select to print 2 copies. One copy is for the site manager and one copy for the front desk CSSThen press Print.

**Step 10:** Make note of any Spanish, ASL or other special notes pertinent to each appointment on the *Notes* or *Prefiero espaÑ±ol* columns.

Start Time	First Name	Last Name	Phone	Calendar	Notes	Prefiero espaÑ±ol
8:30 AM	Sample first name	Sample last name	'+15127010018	Prosper North		
8:55 AM	Sample first name	Sample last name	'+15128253781	Prosper North		yes
10:00 AM	Sample first name	Sample last name	'+15128256549	Prosper North		yes
8:30 AM	Sample first name	Sample last name	'+17372262543	Prosper South		
8:35 AM	Sample first name	Sample last name	'+15129396434	Prosper South		yes
8:35 AM	Sample first name	Sample last name	'+15127397524	Prosper South		
8:40 AM	Sample first name	Sample last name	'+15129641307	Prosper South		yes
8:40 AM	Sample first name	Sample last name	'+15127339856	Prosper South		
8:45 AM	Sample first name	Sample last name	'+15124371858	Prosper South	ASL	
8:55 AM	Sample first name	Sample last name	'+15127982076	Prosper South		
10:00 AM	Sample first name	Sample last name	'+15126538962	Prosper South		yes

Congratulations. You're Done!