

How to bulk export Client Notes to PDF

Export your Clients Notes, Attachments and Quick Notes

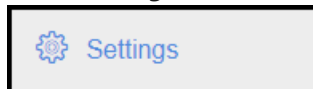


Written by eNoteFile Team
Updated over a week ago


You can export your client notes and quick notes as PDF as well as export your attachments. All client associated notes and attachments will be grouped under a client folder. Only users with the [Subscription Administrator Privilege](#) can export organisational data.

Steps to Export your client notes

Go to **Settings** then **eNoteFile Account**



Click on **Export Notes and Attachments**



eNoteFile Account

- [Organization Details](#)
View and update your organization's details.
- [Team Members](#)
Invite and manage your team members and practitioner availability.
- [Billing](#)
Manage your eNoteFile subscription and payment method(s).
- [Export Data](#)
Export your Appointment Types, Appointments, Clients, Contacts, Contact Types, Group Appointments, Invoices, Payments, Practitioners and Products.
- [Export Notes and Attachments](#)
Export all of your organization's Client Notes and Attachments together with all private and shared Quick Notes.

Click **continue**

NOTE: Please note this process will take some time to complete.

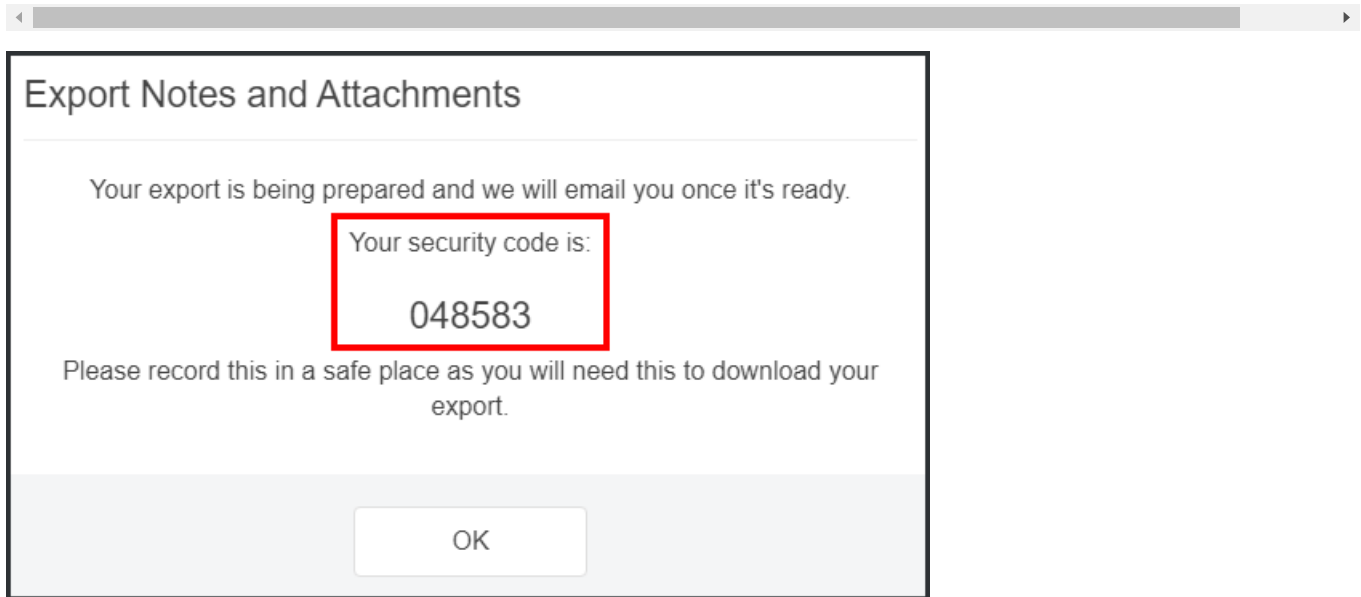
Export Notes and Attachments

Exporting your notes and attachments may take a little time and we will email you when your files are ready.

[Continue](#) [Close](#)

Take note of your **Security Code** and click **OK**

NOTE: Make sure to keep this security code as you'll need this to download your data. This code is only shown at thi



Export Notes and Attachments

Your export is being prepared and we will email you once it's ready.

Your security code is:

048583

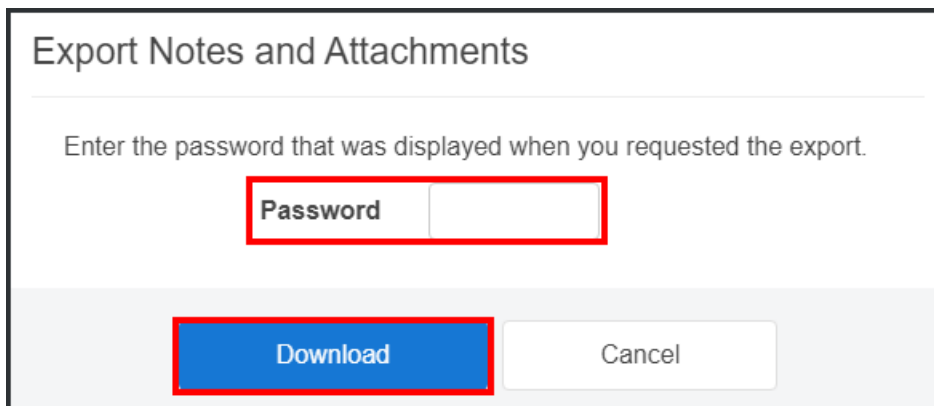
Please record this in a safe place as you will need this to download your export.

OK

You'll then receive an email to confirm the download with your security code. Depending on the size of the data the export this email could take a few minutes or a few hours. Click on the **link** and enter the password you saved from earlier.

What to do if you aren't receiving the export email with your link?

1. Check your **junk** or **spam** folder.
2. We recommend that you can **contact your email provider** to check that noreply@enotefile.com is not **being flagged or blacklisted** (stopped by them).
3. Or, you can add yourself as a [new administrator user](#) using a **different email address e.g. Gmail**, and check if the email is delivered.



Export Notes and Attachments

Enter the password that was displayed when you requested the export.

Password

Download Cancel

When you enter the password, you've now confirmed the export and will receive an email to download your export. This can take several minutes to a few hours depending on the size of your database (please check your spam/junk folder if not received).

Continue Export for Notes and Attachments

We'll email you a link to download your files once ready. Please allow up to several hours for the email to arrive (please check your junk/spam folder).

OK

When you receive the email, click the **Download Now** button to download your database patient notes and attachments as a zip file.

Please note this email can take several minutes to a few hours depending on the size of your database.

Your export is ready to download!

Hi Daniel G,

Click the button below to download your data export.

Download Now

Please note that this link is only valid for 7 days, after which you will need to request a new data export.

If you did not request a data export, please delete this email and do not download the file.

Regards,

eNoteFile Team



eNoteFile Services
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1800 080 473 (Australia)
+61 3 5221 0079
(International)

The eNoteFile data is converted and downloaded into an easily accessible industry-standard file on your local computer. Each patient has a structured client folder, with a PDF of their notes, and any attachments.

Struggling to open your downloaded zip?

1. We recommend contacting and checking with your local IT
2. Try a different Zip utility e.g.
 - a. 7-Zip <https://www.7-zip.org/>
 - b. WinRAR <https://www.win-rar.com/>.

Security and Backup

Notes stored within eNoteFile are encrypted and backed-up. However, this export of your database contains unencrypted PDFs and is not backed-up. We recommend you have measures in place to secure this data once you download and store it on site, including contacting your local IT to ensure this data is securely stored.

NOTE: As with any further electronic use of your eNoteFile exported notes, attachments, and CSV file, no matter what alternative you choose, we recommend you engage your own IT support to ensure you always keep, maintain, backup and store a separate copy of your eNoteFile export securely as is, and only ever use a copy to integrate with another program.

#export #download #pdf #bulk #mass