

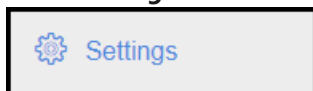
How to export Practice Management data

Export your Clients, Appointments, Invoices, Payments and the rest of your practice management data to csv

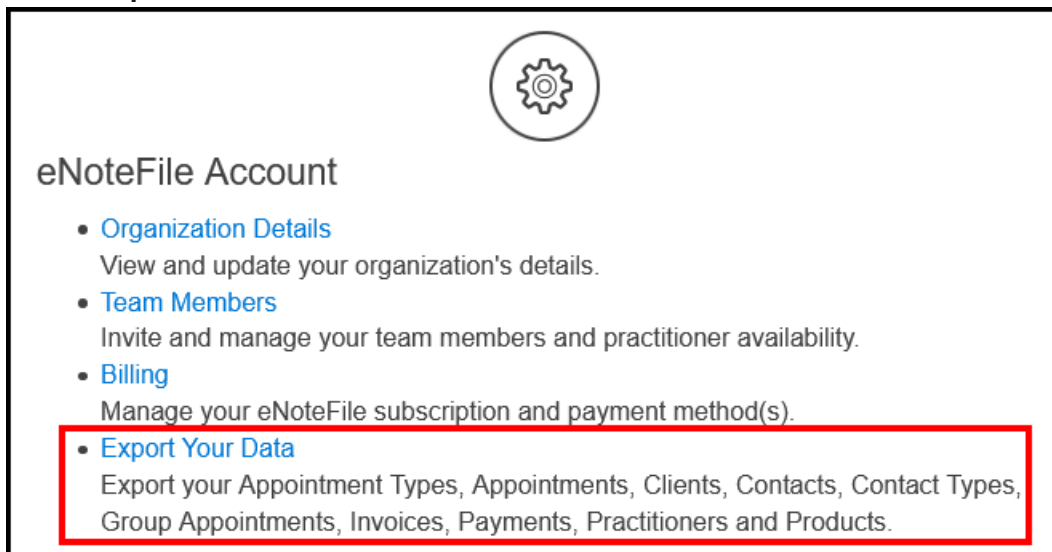
You can export your Appointment Types, Appointments, Clients, Contacts, Contact Types, Group Appointments, Invoices, Payments, Practitioners and Products. Only users with the [Subscription Administrator Privilege](#) can export practice management data.

Steps to Export your data

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

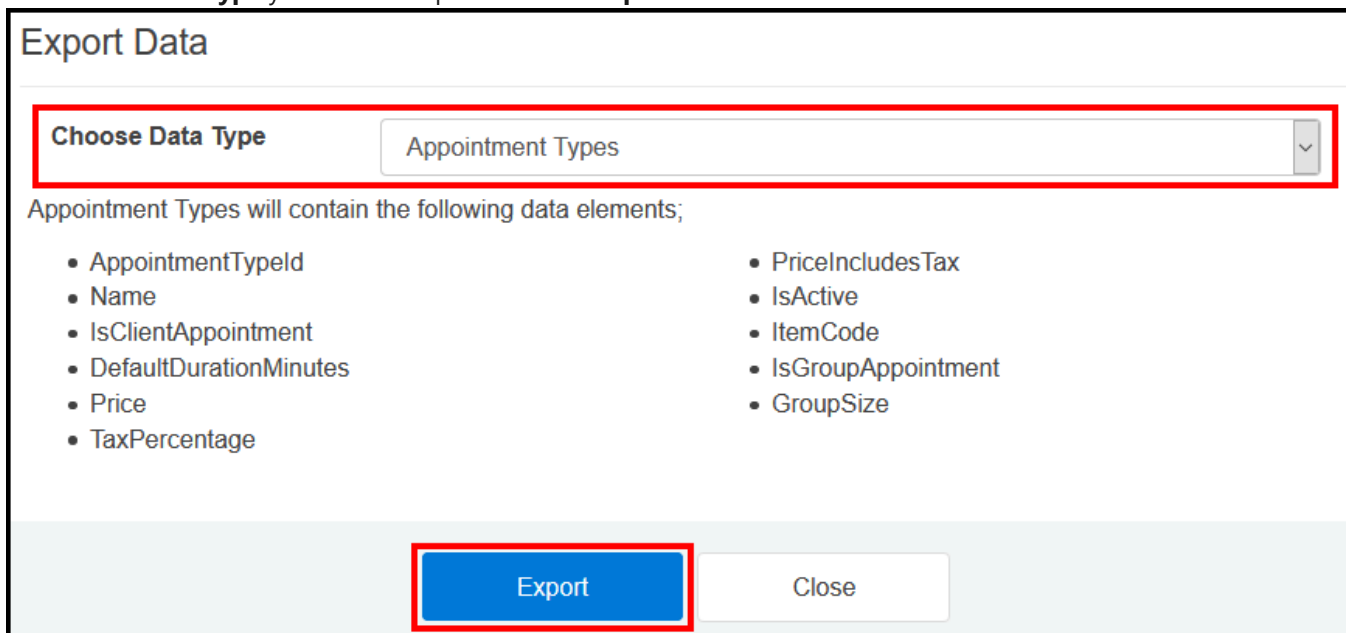


Click on **Export Your Data**



The screenshot shows the "eNoteFile Account" settings page. At the top center is a gear icon. Below it, the title "eNoteFile Account" is followed by a list of menu items: "Organization Details", "Team Members", "Billing", and "Export Your Data". Each item has a brief description. The "Export Your Data" item is highlighted with a red rectangular box. Below the list, there is a red-bordered box containing the text: "Export your Appointment Types, Appointments, Clients, Contacts, Contact Types, Group Appointments, Invoices, Payments, Practitioners and Products."

Choose the **Data Type** you want to export and click **Export**



The screenshot shows the "Export Data" dialog box. At the top, the title "Export Data" is displayed. Below it is a dropdown menu labeled "Choose Data Type" with "Appointment Types" selected. The dropdown is highlighted with a red rectangular box. Below the dropdown, the text "Appointment Types will contain the following data elements;" is followed by two columns of bulleted items: AppointmentTypeId, Name, IsClientAppointment, DefaultDurationMinutes, Price, TaxPercentage, PriceIncludesTax, IsActive, ItemCode, IsGroupAppointment, and GroupSize. At the bottom of the dialog, there are two buttons: "Export" (highlighted with a red rectangular box) and "Close".

Once your data has been exported, you'll be able to **download** the CSV file to your device.

Export Data

Your export has completed

[Download](#)

Close

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 #Data #Bulk #Mass #Backup