

How to export clients

Option to export client list as a CSV



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You are able to export a list of your clients as a CSV file from the client page. This will contain all the client detail information like First name, Last name, Email, Mobile etc. Only users with the [Practice Manager Privilege](#) or higher can export the client list ([Export Practice Management data](#)).

Steps to export clients:

1. Go to pm.enotefile.com
2. Go to **Clients**
3. Click on the three dots (top right)
4. Click **Export Clients**

The screenshot shows the eNoteFile interface. At the top, there is a blue header with the eNoteFile logo, a search bar labeled "Search clients", and a user profile for "Bruce". On the left, there is a sidebar with navigation options: "+ Quick Note", "+ Client Note", "Calendar", "Quick Notes", and "Clients" (which is highlighted). The main content area is titled "Clients" and features a search input field. Below the search field is a table with columns: "First Name", "Last Name", "Date of Birth", and "Mobile Phone". The table contains two rows of data: "Boris La Wille" (DOB: 30 Jan 1993) and "Bonnie Lishman" (DOB: 25 Mar 1997). In the top right corner of the main content area, there is a menu with three options: "+ New Client", "Import Clients", and "Export Clients". The "Export Clients" option is highlighted with a red box.

NOTE: When you export a CSV file and open it in Microsoft Excel the program drops the leading 0's (Zeros) for phone/mobile numbers because it is a number. IE 0001 will be seen as 1. For more information about importing a CSV to open in Microsoft Excel can be found [here](#). You can also Google "importing CSV into Excel without losing zeros" if you don't have experience with working with data spreadsheets.

#Export #Data