

Notes upgrade to Notud

Information on the new notes upgrade, Notud. Follow this guide to integrate eNoteFile Practice Manager with Notud.

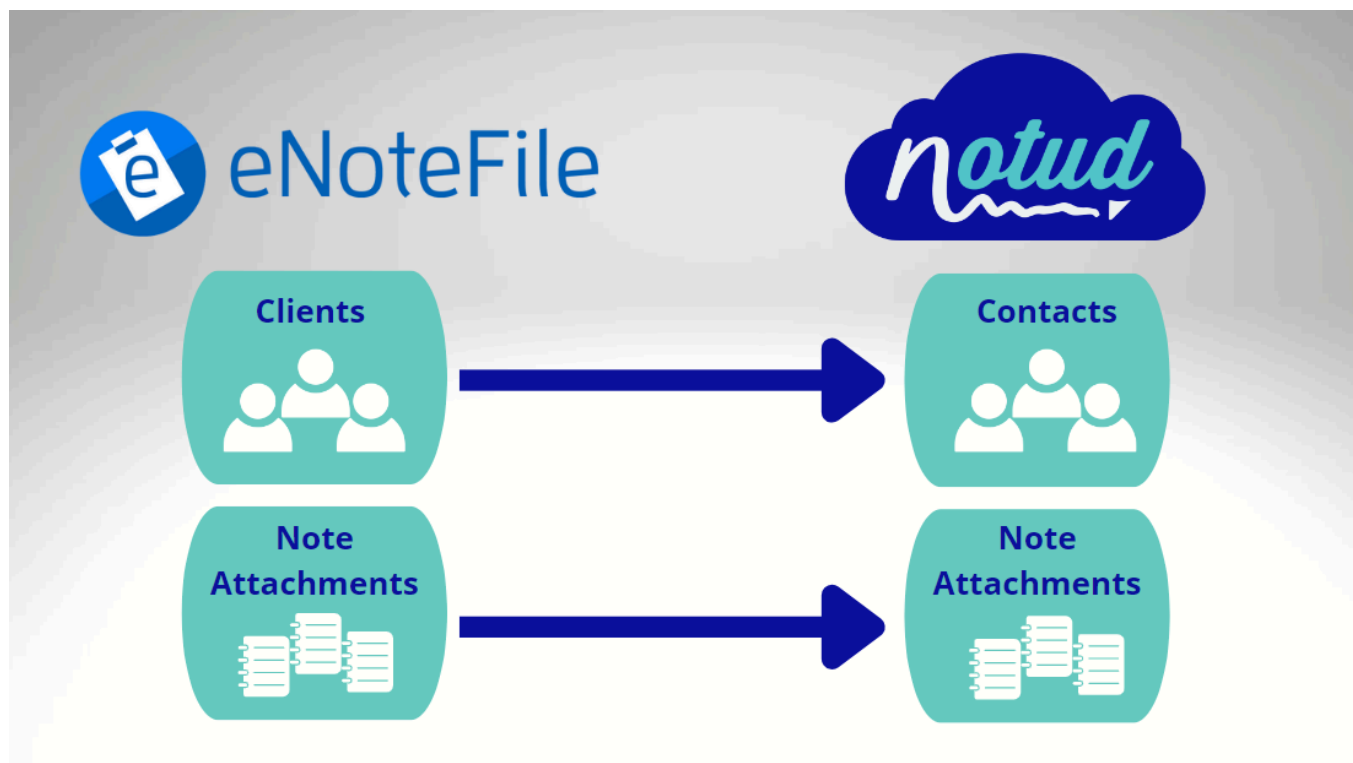


Written by eNoteFile Team

Updated in the last 15 minutes

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What is Notud



Notud Features

Searchable hand-written notes

We have added Optical Character Recognition (OCR) to the platform which will scan and index your notes. Meaning that you can type words in your search bar and Notud will find your hand-written, typed or converted to text notes.

Send notes as PDFs

Share your hand written, digital notes as PDFs direct from Notud to anyone in, or outside your organisation.

Nods

Unsure if your team members have seen your recent set of client notes? Now you can let your team mates know to check a note by sending them a quick Nod.



Thumbnails

Client notes are now stacked and labeled with thumbnails making it easier than ever to find a note.



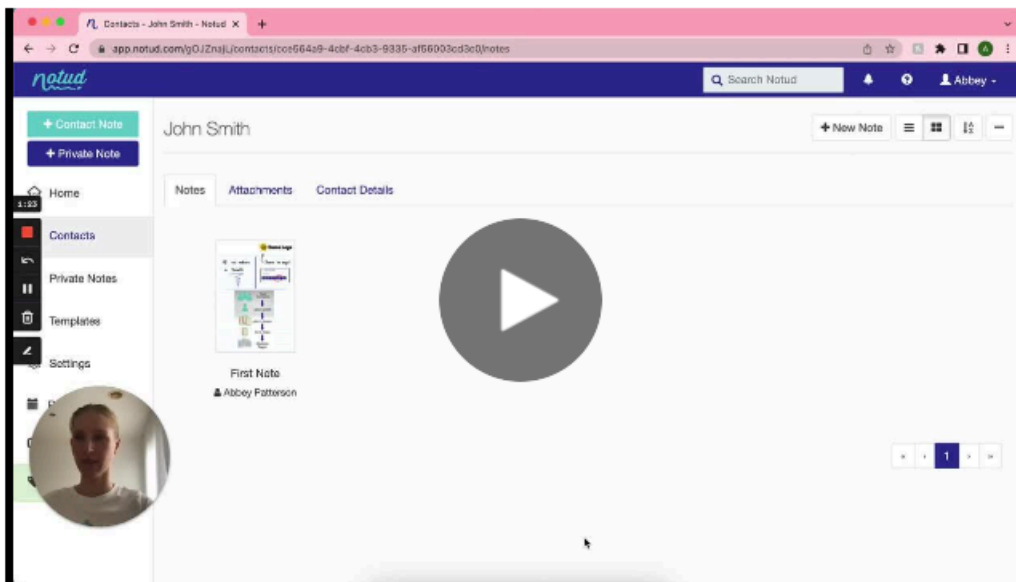
Auto-save

The new auto-save feature ensures your files are saved automatically, every few minute, as you work. You'll never have to worry about losing a client note.

Steps to upgrade your notes.

Watch this video as Abbey takes you through the 5 minute process of upgrading your notes. We've also included a step by step guide below.

Please note, we recommend starting this upgrade after your last client, as the background process can take 15mins to 3hours to complete depending on the size of your database.



Play Video

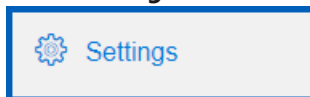
Step 1:

Make sure you are logged into **eNoteFile Practice Manager**.

Login

Step 2:

Go to **Settings**



Step 3:

Under '**eNoteFile Account**' click on '**Integrate with Notud**' then '**Start integration**'



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 \(Preview\)](#)
Export all of your organization's Client Notes and Attachments together with all private and shared Quick Notes.
- [Integrate with Notud](#)
Integrate eNoteFile with Notud to enable enhanced note taking features.

Integrate eNoteFile and Notud

Enable the integration between eNoteFile and Notud to take advantage of the enhanced note taking features.

During the integration process we will copy data for clients, client notes, quick notes and attachments to Notud. You can [learn more](#) in our Notud help article.

Please do not add or update an data in eNoteFile while the integration process is being completed.

[Start integration](#)

Cancel

Please note that we will send a Notud invite to all active users.

Step 4:

Click '**Allow**'. This will let you login with with your eNoteFile credentials (so you don't have to create a password).



Allow Notud to access your
eNoteFile data

Personal Information

- **Profile**
Allows the connected app to access the profile info.
- **Email**
Allows the connected app to access the email address.

Team: My Company

Notud will be able to access your:

eNoteFile Data

- **Clients**
Allows the connected app to access the details of all your clients details and notes.
- **Offline Access**
Access to the above eNoteFile data, even when you are offline

Allow

Cancel

Step 5:

Enter your **clinic name**, click '**I agree**' and '**Yes, sync contacts**'.

Complete your profile

First Name

Last Name

Email

Business/Team Name

Industry

I agree to the User Terms and Privacy Policy

Do you want to sync your eNoteFile clients?

Yes, create my account and sync clients

Step 6:

Click '**OK**' to setup your Notud Preferences

eNoteFile


Integration Set Up

Notud ♥'s eNoteFile. Let's Go!

We've got everything required to setup your eNoteFile integration.

Our last step together is setting up your Notud app preferences. Click the link below to launch the app and get started.

During the first app setup we will synchronize your eNoteFile Clients in the background. If you have a large number of clients this may take some time. We will email you once all clients have been synchronized.



OK I'm ready. Let's Launch Notud!

Step 7:

Setup your Country, Time Zone and Language and click '**Continue**'.



Welcome to Notud!

Before we get started, tell us where you are located and we'll customize Notud to suit your location.

Country

Language

Time Zone

Continue

Step 8:

Setup your Private Note template (this can be done at a later point). Private Note is the new name for a Quick Note.



Customize Your Template!

Choose your private note template and customize with your logo.

Your logo

Template



Let's go!

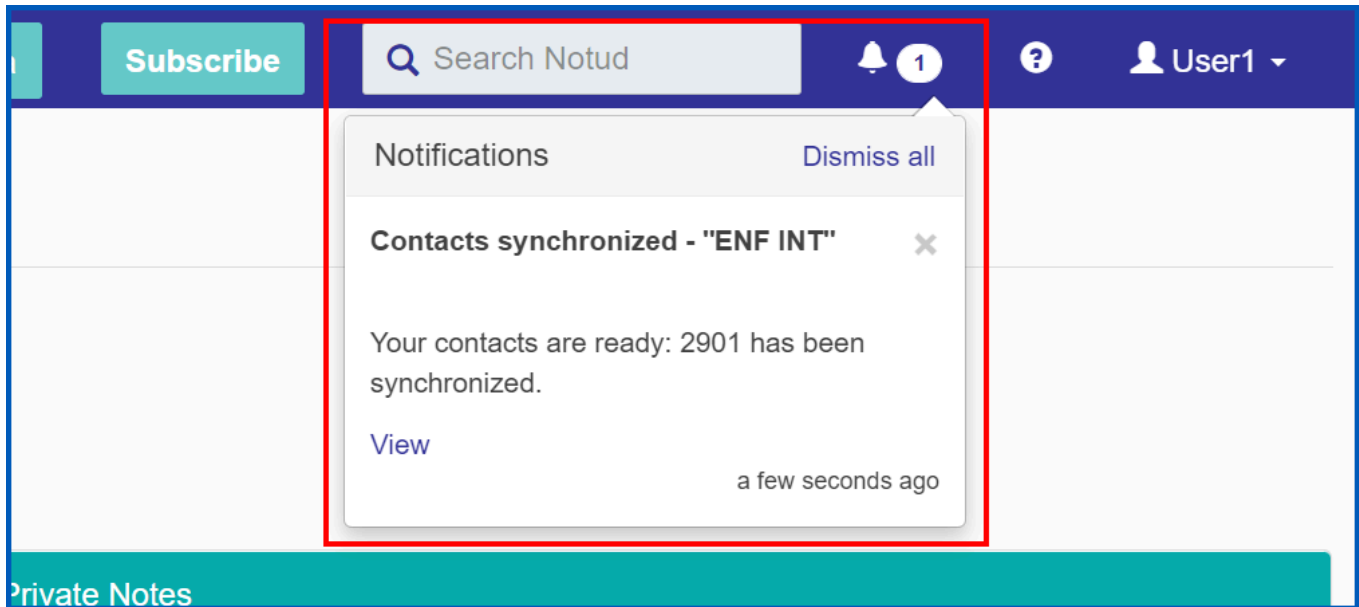
Skip

Done!!!

The syncing process will take **5-50mins to complete** in the background depending on the size of your database. **We'll let you know when this process has completed** with an:

1) **Email**

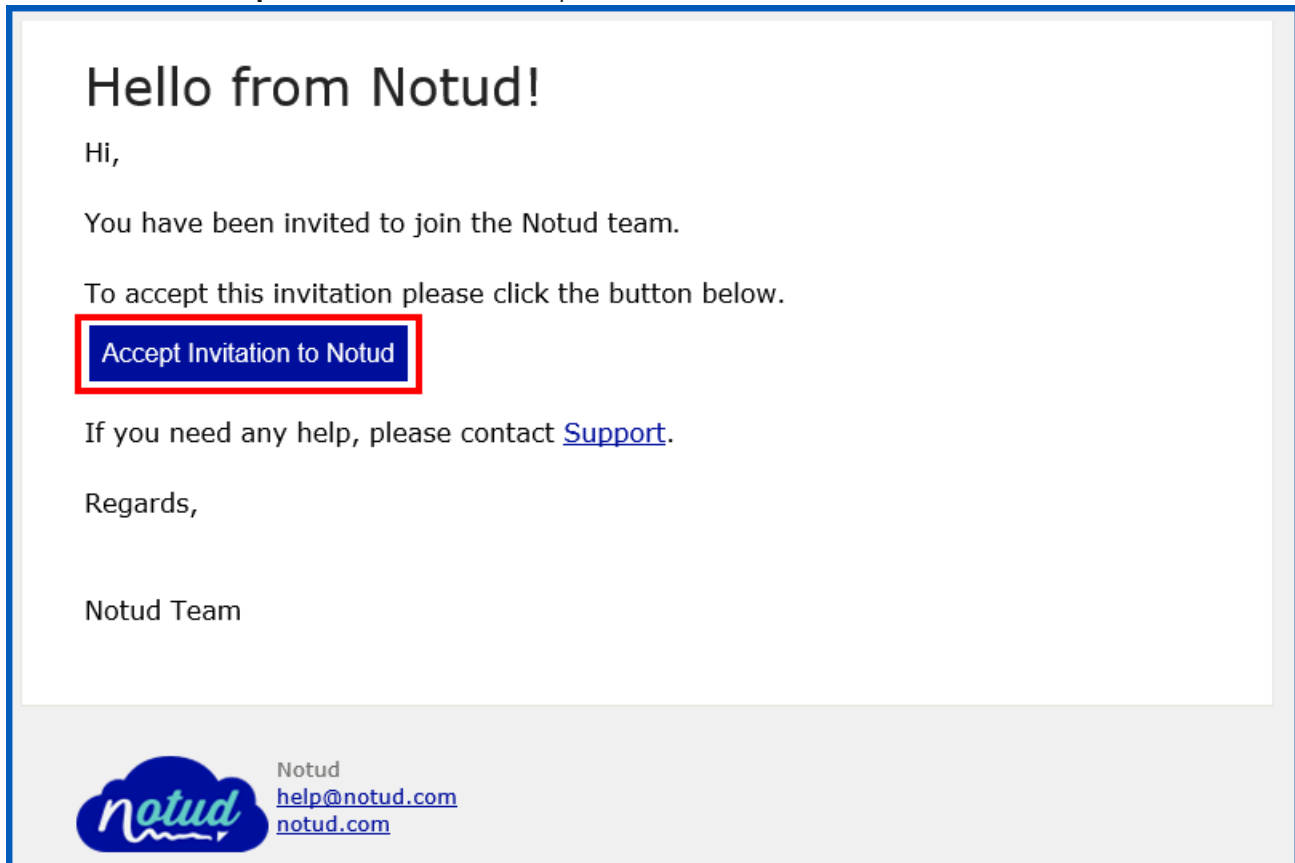
2) **Notification** via the onscreen bell icon.



- NOTE: Once completed, all your clients, Quick Notes and Client Notes will synced to Notud.
- NOTE: If you have multiple users, they will receive an email to activate their Notud Account.

Activate multiple users

Once the upgrade has completed, all your users (practitioners) will receive an email to activate their account. Each user will need to click **Accept Invitation** and create a password.



Update pre-fill fields and remove unwanted templates

After the upgrade all your templates will be available in Notud as well as the default templates. You'll need to update the fields and remove any unwanted templates.

The screenshot shows the 'Team Templates' page in Notud. The page has a dark blue header with the Notud logo, a 'Subscribe' button, a search bar, and user information. On the left is a sidebar with navigation options: Home, Contacts, Private Notes, Templates (selected), and Settings. The main content area is titled 'Team Templates' and has two tabs: 'Team Templates' (selected) and 'Notud Template Library'. There are buttons for '+ Create Template' and '+ Import PDF'. Below the tabs is a table of templates:

Name ▲	Active
Ax <small>eNF</small>	Yes
Ax	Yes
Blank <small>eNF</small>	Yes
Blank	Yes
Body <small>eNF</small>	Yes
Body	Yes
Lined <small>eNF</small>	Yes
Lined	Yes
Private Note	Yes
Quick Note <small>eNF</small>	Yes

At the bottom right of the table is a pagination control showing '1' in a dark blue box, with arrows for navigation.

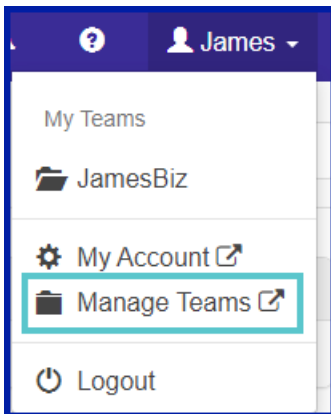
Field	eNoteFile	Update to	Notud
Patient Name	{Patient.Fullname}	→	{Contact.Name}
Patient Birth Date	Patient.Birthdate}	→	{Contact.BirthDate}

How to subscribe

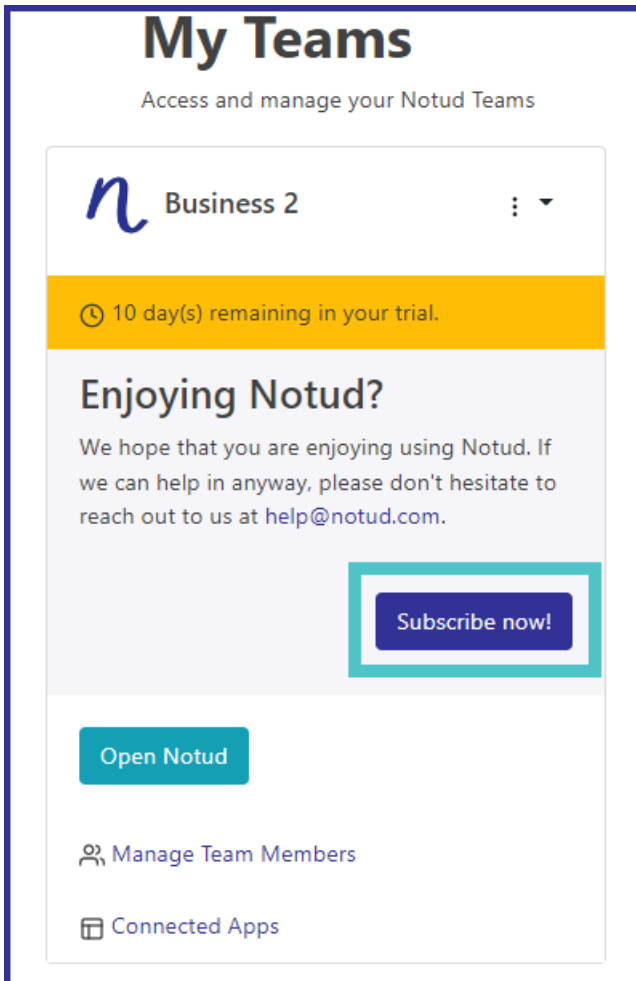
Steps to subscribe

You can create a subscription through the teams page.


Go to [Manage Teams](#).



Click on **Subscribe now!** to manage your details.



Enter your details and click next


Add your billing address


Standard User \$0.00 >

You will be charged after the 14-day trial.

First Name Billy	Last Name Bloggs
Email (Optional) billy@outlook.com	
Phone (Optional) +1 ▾	
Address Line1 441A Moorabool Street	
Address Line2 (Optional)	
City South Geelong	Zip (Optional) 3220
State Victoria	Country Australia ▾



Next

Click on **standard user** to enter a coupon **ENOTEFILENOTUD50OFF** to get 50% off for the lifetime of your subscription.


Add your payment details

Standard User (Incl tax) \$10.00 >

You will be charged after the 14-day trial.

Card Number 	
Expiry	CVV 

Next

Finally, enter your **card details** and click next and **Subscribe**