Notes upgrade to Notud

Information on the new notes upgrade, Notud. Follow this guide to integrate eNoteFile Practice Manager with Notud.
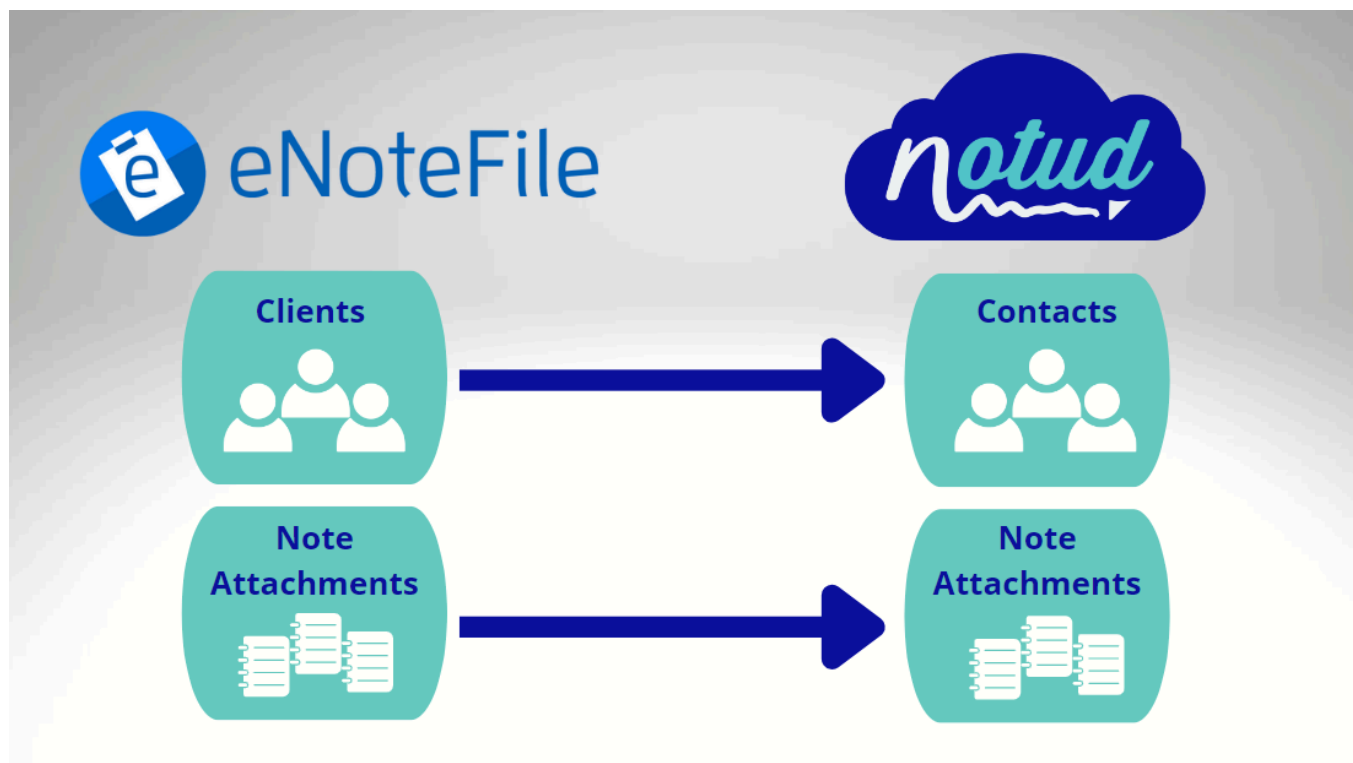
Written by eNoteFile Team
Updated in the last 15 minutes

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.
```
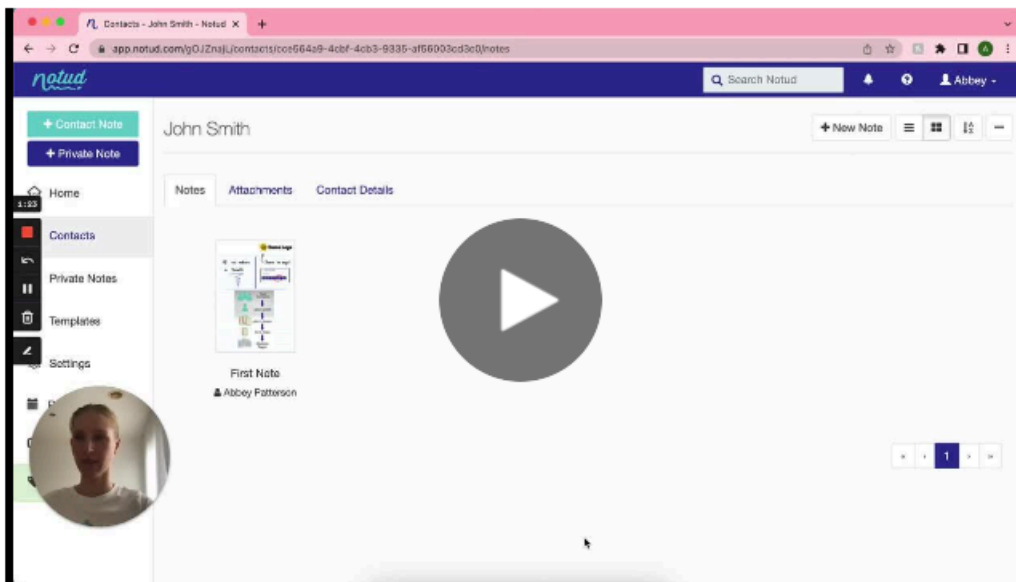
Step 1:
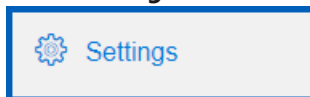
Make sure you are logged into **eNoteFile Practice Manager.**

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).

Step 5:

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

Step 6:

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

Step 7:

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

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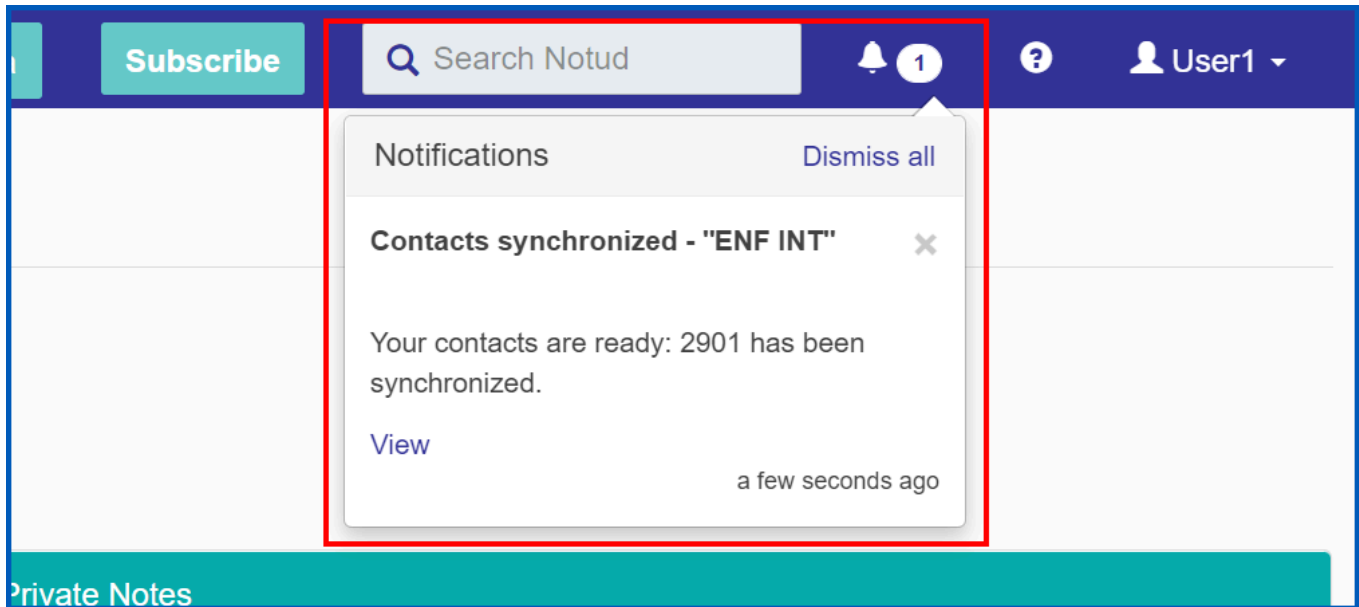
- NOTE: Once completed, all your clients, Quick Notes and Client Notes will synced to Notud.
- NOTE: If you have multiple users, they will receive an email to activate their Notud Account.

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.
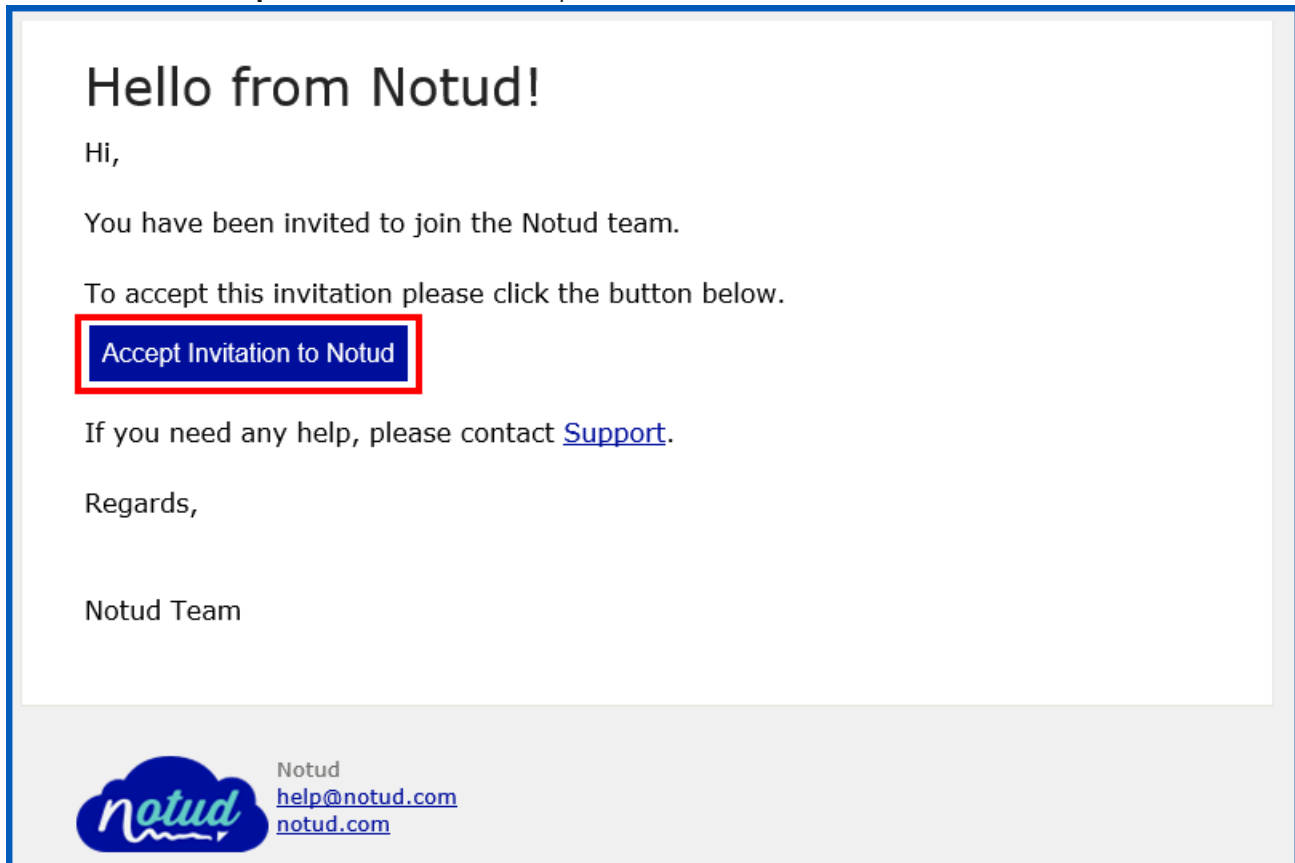
Update pre-fill fields and remove unwanted templates

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.

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

How to subscribe

Steps to subscribe

You can create a subscription through the teams page.
Go to **Manage Teams.**
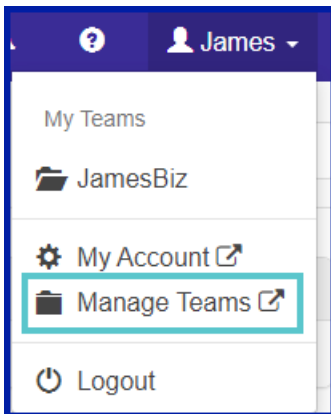
Click on **Subscribe now!** to manage your details.
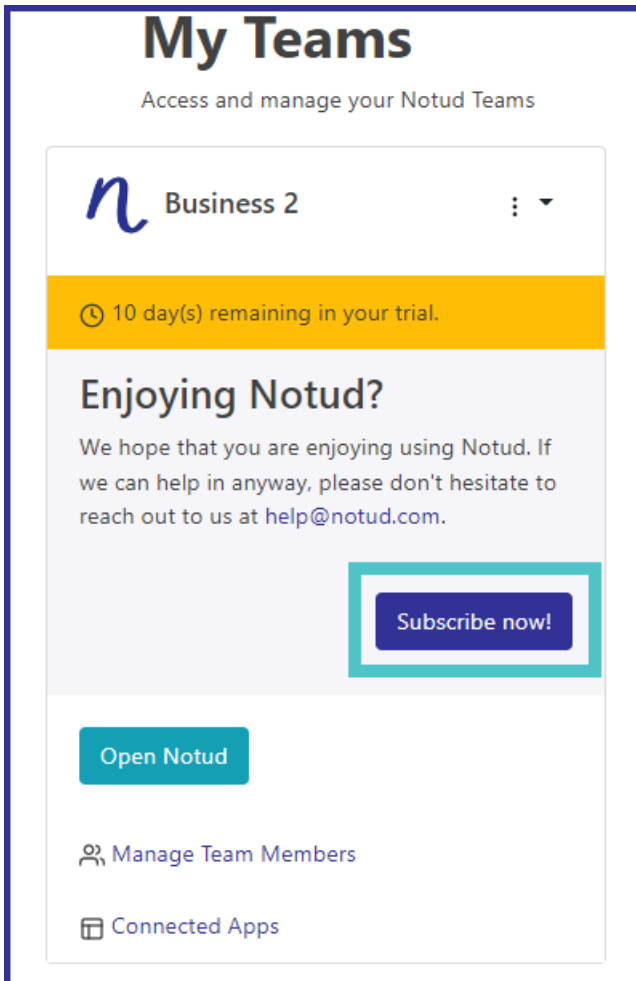
Enter your details and click next

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

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