

[v12.351p and above] CloudPBX Software - open Patient Notes

779 [TDO KB](#) November 21, 2025 [Cloud PBX](#) 3.53K

Overview

When a patient calls on the phone, if your office is using the CloudPBX integration, the popup window has the ability to display notes entered in TDO Software from the "Create Note" form.

Prerequisites = minimum TDO version 12.351p + CloudPBX Software integration

This feature is only available in **TDO versions of v12.351p and above**, that are already setup with TDO's **CloudPBX 3CX system integration**. For further details on these prerequisites please visit the below links:

Updating TDO version 12 - [Knowledge Base \(KB\) article 643](#)

CloudPBX Software - [Knowledge Base \(KB\) article 682](#)

Details/ Functionality

If a patient has a note entered in their chart from the "**Create Note**" form in TDO, this is how the note will appear in the CloudPBX integration.

The screenshot displays the TDO software interface. At the top, there are input fields for 'Last Name: Test', 'First Name: Outcomes. "AKA"', and 'Phone: 1545984554'. To the right of these fields are checkboxes for 'T1', 'T2', and 'T3'. Below these are buttons for 'Click to Paste Pre-op 1 Image' and 'Click to Paste Post-op 1 Image'. A table on the right shows patient data:

Tooth	Initial Date	Doctor	Comp Date
9	9/11/2018	Carr	
12	9/11/2018	Carr	
27	6/22/2018	Carr	
28	6/22/2018	Carr	
29	6/22/2018	Carr	

Below the table are buttons for 'Hide', 'R', 'Alerts', 'Create Note', and 'Menu'. A horizontal menu bar contains tabs for 'Patient', 'Appointments', 'Fees', 'Ledger', 'Insurance', 'Medical History Summary', 'Pain History', 'Pain', and 'Full Mo'. Below this is another row of tabs: 'Case Presentation', 'Treatment', 'Final Report', 'Notes to Front', 'Letters', 'Prescriptions', 'Recall', 'Notes', and 'S'. A 'Patient Note' popup window is open, showing a yellow background with the text 'Testing note...'. At the bottom of the popup are a 'Font Size: 8' dropdown and a 'Close' button. On the left side of the main interface, there is a small image of a sunset over water.

When a patient calls the office, the CloudPBX window pops up on the screen as the incoming call is received.

TDO Connect - 1.0.0.1

Incoming call: 8585682135. Possible matches:

PhoneNumber	EntityName	Contact	PhoneType	EntityType
	Patient	Outcomes. D. Test	Cell Phone	Patient

Patient



Last Name: Test

First Name: Outcomes.

Phone: () -

Email: jennifer@tdo4endo.co

Balance: \$.00

DNETA: ☐ ☐ Show Notes ☐

Status

Tooth	Date	Status	Date
6	7/22/2008	Complete	7/23/2008
7	8/5/2008	Complete	4/9/2009
18	8/15/2008	NPP	10/13/2008
21	10/13/2008	NPP	10/2/2009
30	11/3/2008	Complete	3/17/2009
29	11/19/2008	Complete	1/7/2009

Appointments

Date	Time	Tooth	For
8/28/2009	9:00 AM	3	Cone Fit & X-...
9/11/2009	4:30 PM	4	Check
10/14/2009	1:00 PM	5	Buildup
11/19/2009	1:45 PM	2	Cancelled
5/28/2010	1:00 PM	2	Consult
2/5/2011	12:15 PM	4	CAOH

CloseOpen

“Show Notes” checkbox is located on the lower left corner.

Last Name: Test

First Name: Outcomes.

Phone: () -

Email: jennifer@tdo4endo.co

Balance: \$.00

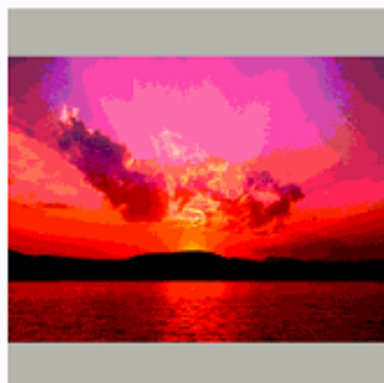
DNETA: ☐ ☐ Show Notes ☐

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CloseOpen

Check the “Show Notes” box and the patient note will display on the CloudPBX window.

Patient



Status

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Last Name:

First Name:

Phone:

Email:

Balance:

DNETA: ☐ Show Notes ☒

Testing note...

Close

Open

Online URL: <https://kb.tdo4endo.com/article.php?id=779>