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

779 TDO KB November 21, 2025 Cloud PBX 3.68K

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.

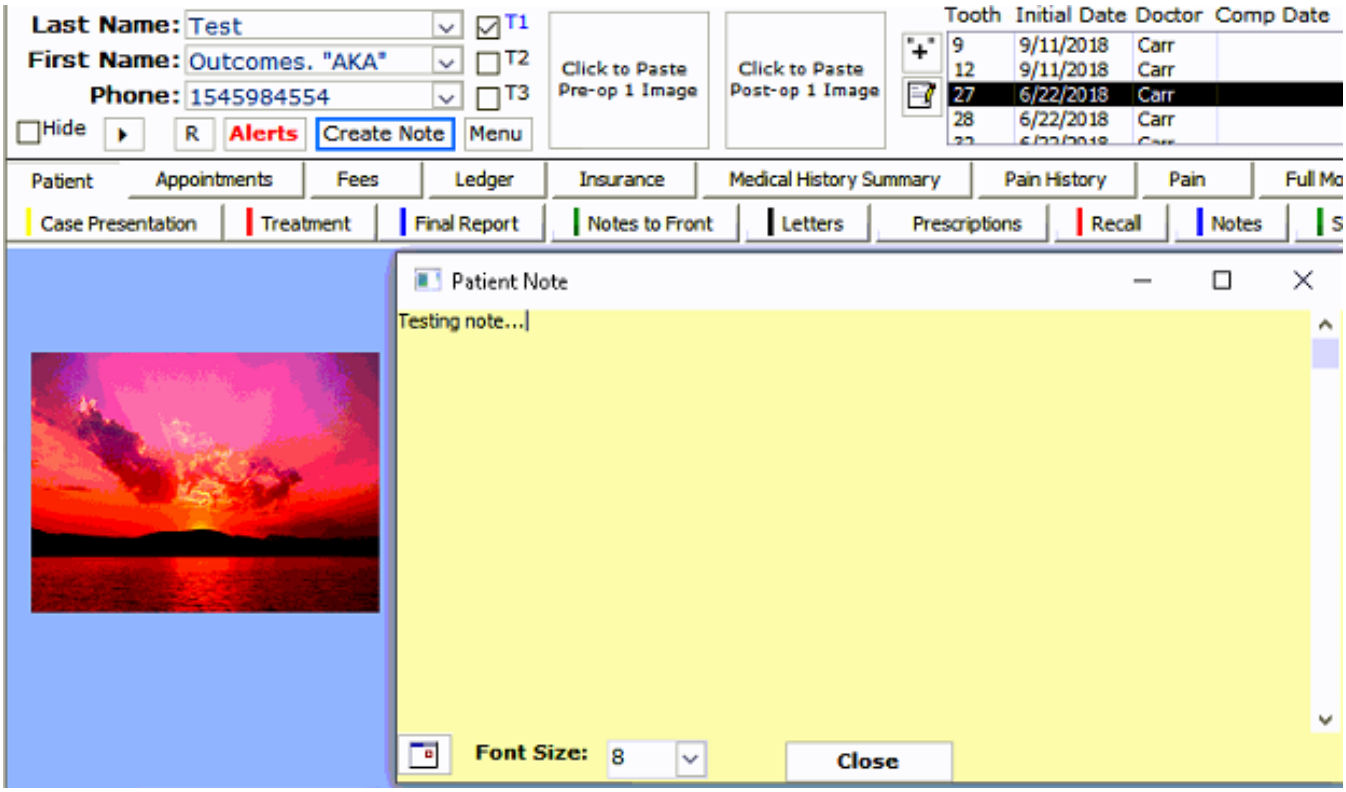
Prerequisites = minimum TDO version 12.351p + CloudPBX Software integration

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:

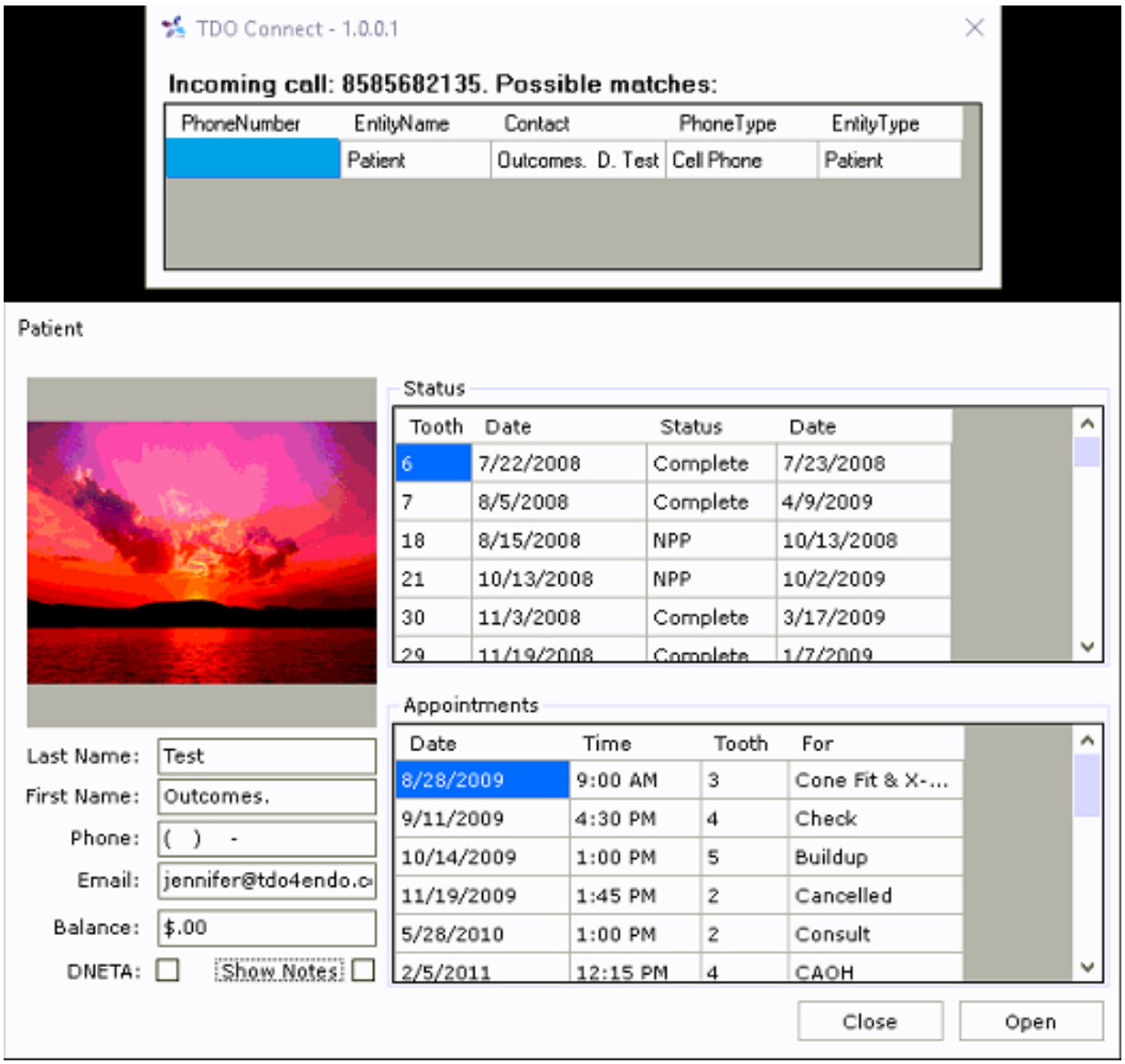
Updating TDO version 12 - Knowledge Base (KB) article 643
CloudPBX Software - Knowledge Base (KB) article 682

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.



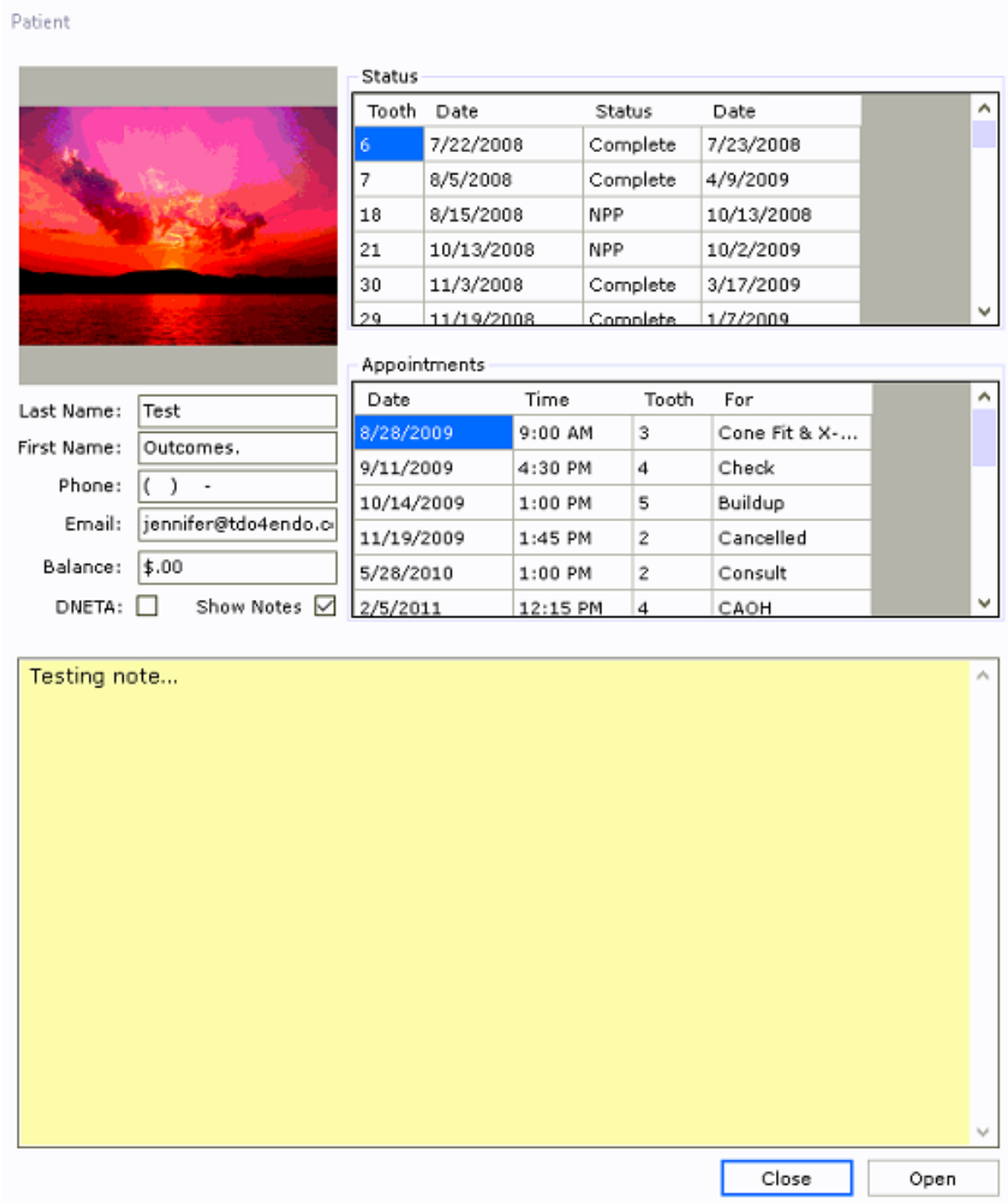
When a patient calls the office, the CloudPBX window pops up on the screen as the incoming call is received.



"Show Notes" checkbox is located on the lower left corner.



Check the **"Show Notes"** box and the patient note will display on the CloudPBX window.



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