

# ONBOARDING AND USER GUIDE



**Going  
electronic  
doesn't just  
mean typing**

# **WHY HANDWRITE?**

- **Better recall and memory**
- **Better understanding and retention**
- **Builds more empathy with your clients**

Moving to the cloud, and in particular, having the ability to **handwrite** your notes on an electronic device, is changing the way businesses work all over the world.

Those embracing the changes are being able to work more flexibly, more cost-effectively, they are retaining more information, and their clients are trusting them more.

# CONTENTS

<b>Introduction</b>	<b>5</b>	<b>Notes</b>	<b>22</b>
What is Notud?	5	Writing & Typing	22
Why Notud?	5	Add & Delete a Page	23
<b>Overview - Dashboard</b>	<b>6</b>	Zoom & Scale	24
<b>Overview - Note Page</b>	<b>7</b>	Add Images	24
<b>Access Notud</b>	<b>8</b>	Rename a Note	24
Notud	8	Lock a Note	25
Xero	9	Delete a Note	25
<b>Devices</b>	<b>11</b>	Export or Print a Note	26
<b>Contacts</b>	<b>13</b>	<b>Contact Notes</b>	<b>27</b>
Create a Contact	13	Create a Note	27
Sync Contacts (Xero)	13	Access a Note	29
Import Contacts	15	<b>Private Notes</b>	<b>30</b>
Export Contacts	16	Create a Note	30
Edit Contact Details	16	Access a Note	30
Add Attachments	18	Share a Note	31
Contact Search	19	Assign to a Contact	32
Contact Types	20	<b>Note Templates</b>	<b>33</b>
		Create a Template	33
		Use a Template	35
		Edit a Template	35
		Deactivate & Activate a Template	35



# CONTENTS

## Teams

What is Teams?	36
Access Teams	36
Create a new Team	36
Invite a User	37
Link a Xero Organisation	38
Invite a Xero User	38
Disconnect a Xero Organisation	39

## My Account 40

Access My Account	40
Update your Name or Email	40
Update your Password	41
Two-Factor Authentication	41

## Support 43

Online Help Guide	43
Contact Us	44
Videos	45
Webinars	45

## Security 46

## No-Login Notes 48

What are No-Login Notes?	48
Access No-Login Notes	48
Sign Up and Save Note	48
Login and Save Note	49
Send a Link	50
Email a Link	50
Save to PDF or Print	52



# INTRODUCTION

## What is Notud?

Notud is the easiest way for paper people to go paperless. We help people go electronic with their note taking with clients, by providing them with software to replace their paper notepad. You can handwrite your notes straight on to your tablet, phone or computer, and access them anywhere, from any device by signing in on your browser.

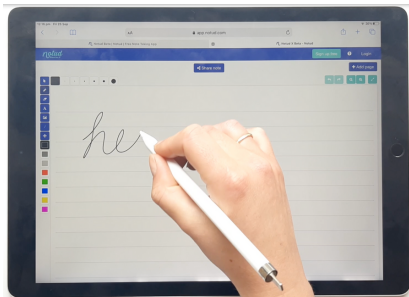
## Why choose Notud?

Notud allows complete functionality and flexibility for small businesses to write and share client notes.

**Functionality** - Create, import, or sync your clients in to Notud so you can start note taking and filing your notes. Client notes are shared with your team so you can work collaboratively and seamlessly.

**Flexibility** - You can write, draw or types notes on the device of your choice, and use it on any device without needing to download and install an app.

**Customisable** - You can create your own custom note templates to write and draw on with images, logos, custom fields, lines and more. You can create any form or template you currently have on paper, now in the cloud.



# DASHBOARD

The dashboard interface includes a top navigation bar with the Notud logo, company name 'Demo Company (AU)', a search bar for contacts, and user profile 'Abbey'. A left sidebar contains links for '+ Contact Note', '+ Private Note', 'Contacts', 'Private Notes', 'Templates', and 'Settings'. The main content area displays 'Private Notes' with a table of entries and a '+ New Note' button. Annotations with arrows point to these elements, explaining their functions.

**Create new Private Note**

**Create new Contact Note**

**Search your entire Contact list from any page**

**Access My Account**

**Create new Private Note**

**Access Contacts**

**Create Note Templates**

**Settings:**

- Contact Types
- Teams
- Users
- Xero

**All Private Notes**

Name	Created By	Created	Last Modified	Private	Actions
Meeting with Joel	Abbey Patterson	27 Aug 2020 3:59 pm	17 Nov 2020 6:26 pm		Actions
17 Nov 2020 6:09 pm	Abbey Patterson	17 Nov 2020 6:09 pm	17 Nov 2020 6:09 pm	✓	Actions
28 Aug 2020 3:53 pm	Abbey Patterson	28 Aug 2020 3:53 pm	28 Aug 2020 4:02 pm	✓	Actions

# NOTE PAGE

Back to dashboard



- Assign to Contact
- Make Private
- Print
- Add a page
- Lock note
- Delete note



**Rename note**

Alan Williams

New Note Save

30 Nov 2020 12:09 pm

UPDATE THICKNESS OF PEN/ERASER

SELECT AND MOVE ITEM

WRITING

Type

ERASER

ADD AN IMAGE

ADD A LINE OR ARROW

MOVE AROUND PAGE

CHANGE COLOURS

undo redo

PAGE SIZE

zoom

# ACCESS NOTUD

You can access Notud on any device.

## Notud Account

**Sign up** - Signing up is easy and free. Go to <https://my.notud.com/sign-up> or on the Notud website select **Free sign up** to create your account.

**Login** - Login at <https://my.notud.com> or on the Notud website select **Login**.

### Login with a Notud Account



Email

Password

☐ Remember me?

[Forgot your password?](#)

Login with Notud

Create your free account

### Sign up for free now!



Just fill out some details below and start using Notud today (no credit card required).

First Name

Last Name

Email

Organization Name

☐ I agree to the [User Terms](#) and [Privacy Policy](#)

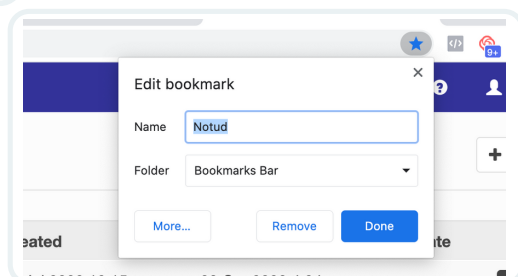
☐

I'm not a robot



Sign up

**Note:** When you are logged in, bookmark your page for quick and easy access.



# Xero Account

**Sign up** - Signing up is easy and free. Go to <https://my.notud.com/sign-up> and select **Sign up using Xero**. Enter your Xero login credentials to create your account.

### ...or sign up using Xero

Notud integrates with Xero, so you can easily take your contact notes with our connected app.

- Single sign-in.
- Quickly open and take notes in Notud from within Xero.
- Sync your Xero contacts so they're available in Notud.
- Share notes with your other Xero team members or keep private.
- Notud does not sync your Xero financial details, and we respect your privacy.
- Free for everyone!



[Sign up using Xero](#)

**Note:** We sync your Contacts so you can take client and contact notes. We do not sync your Xero financial details, and we respect your privacy. You can find out more about Security on page 44.

**Login** - Login at <https://my.notud.com> and click **Login with Xero**.

### Xero Login

[Login with Xero](#)

## Access from Xero

In each Contact you can create a note, access existing, or create a private note.

**Note:** If you don't see these links, go to the next page and follow the steps.

0.00

lar Apr

Add a note

TOTAL

Options Edit

#### Contact Details

☐ Links

- Create Notud
- Existing Notud
- Private Notud

#### Financial Details

Click 'Edit' to store the contact's default financial settings, such as accounts, tax rates, and due dates.



## Add links from Xero



From your Notud account, go to:

- **Settings**
- **Setup Xero Custom Links**

Follow setup prompts:

- **Yes, Setup Xero**
- **Open my Xero custom contact links** (this will open in a new tab, leave it open and come back to the Notud setup instruction page)
- **Done! Show me step 2**

Copy table from Notud to Xero:

- Click the clipboard next to **Create Notud**
- Go to the Xero screen, click **Add a Custom Link**
- Paste **Create Notud** in to the blank field under **Name**
- Do the same for the rest of the table, so the table on the instruction page is now the same as in Xero

### Notes:

Under **Link Definition**, remove the original **http://** from the field before you paste the link from Notud.

To add a new line, select **Add a custom link**).

- Click **Save**

Organisation settings •

### Custom Contact Links



The contact links for Demo Company (AU) have been updated. [Return to Dashboard](#)



#### Custom Contact Links

Create custom links to allow you to click from Xero contacts to other systems such as Customer Relationship Management (CRM).

[Add A Custom Link](#)

Contact Fields Chooser:

Name	Link Definition	
Existing Notud	<a href="https://app.notud.com/90y7X21M/contacts/open?id={CONTACTID}">https://app.notud.com/90y7X21M/contacts/open?id={CONTACTID}</a>	
Create Notud	<a href="https://app.notud.com/90y7X21M/contacts/new?id={CONTACTID}">https://app.notud.com/90y7X21M/contacts/new?id={CONTACTID}</a>	
Private Notud	<a href="https://app.notud.com/90y7X21M/notes/create-note">https://app.notud.com/90y7X21M/notes/create-note</a>	

Note: To view the Xero instructions with images, go to <https://www.notud.com/connectxero>



# DEVICES

Whilst you can access Notud on **any device**, we recommend a **tablet** so you can **handwrite** and draw.

We have tested Notud on the well known brands, Microsoft, Apple and Samsung, but there are thousands on the market. Here are our top tips:

## Tablets

- Choose a pen-enabled device so you can **handwrite** and draw. Make sure the pen is compatible with the device and for best results, **buy the same brand and model**. This is important, and you'll notice the difference compared to a universal pen.
- **Don't go too cheap.** If you want the writing experience to be as close as possible to paper, choose a reputable and trusted brand. Spending a small amount on a tablet and expecting the writing experience to be amazing is, most of the time, very disappointing. It will pay off in the long run paying that bit extra.
- If you're not sure, go in to an electronics store or online to ask questions directly.

**Note:** You can go in store and open <https://app.notud.com> to try the handwriting experience without an account!



# Recommended Devices

## Apple iPad

<https://www.apple.com/ipad/>



## Samsung Galaxy Tab:

<https://www.samsung.com/au/tablets/galaxy-tab-s/>



## Microsoft Surface:

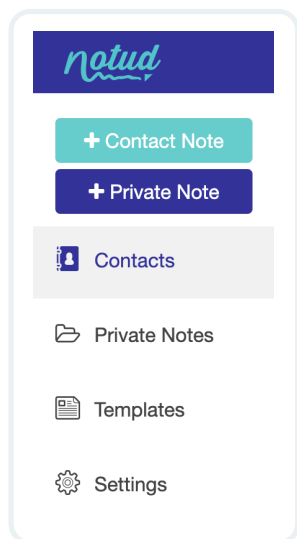
<https://www.microsoft.com/surface/en-au>





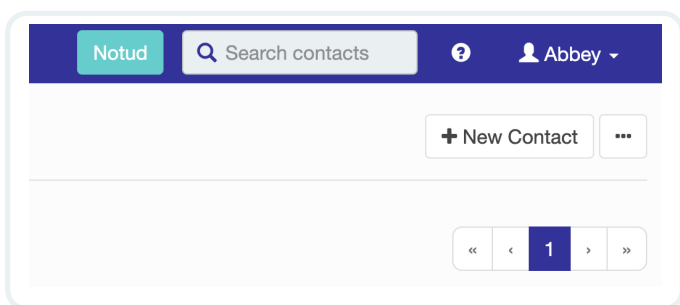
# CONTACTS

## Create a Contact



### Create a single contact

- On the left-hand side menu, select **Contacts**
- In the top right-hand corner, select **New Contact**
- Enter all applicable details and click **Save Contact**



Note: If you have signed up with Xero, to add a Contact, add the Contact and details in your Xero account and it will automatically sync to Notud.

## Sync Contacts from Xero



### Sync during sign up

When you are signing up with your Xero login credentials and select your Xero organisation, your Contacts will **automatically** sync to Notud, so you can start taking notes straight away!





If you choose not to login with Xero from the beginning, you can integrate it later on. To integrate your Xero account with an existing Notud account:

From your Notud account, go to:

- **Settings**
- **Manage Teams**

On My Teams page:

- Under New Xero Team, select + **Connect to Xero**

In Xero:

- Login with your Xero credentials
- Choose the Xero organisation you wish to integrate (if you only have one, you will not need to select it)
- **Allow access**

In Notud:

- You have the option to set up links to access your notes directly from within your Xero Contacts
- Select **Yes, setup Xero** (*refer to page 7*), or **Skip** (if you have 5 minutes, do this now, or if you're pressed for time you can come back later)
- Select your time zone

Notud will automatically sync you Contacts now. If you have a lot of Contacts, this may take a minute and you will be directed to Notud when it has successfully synced.

# Import Contacts

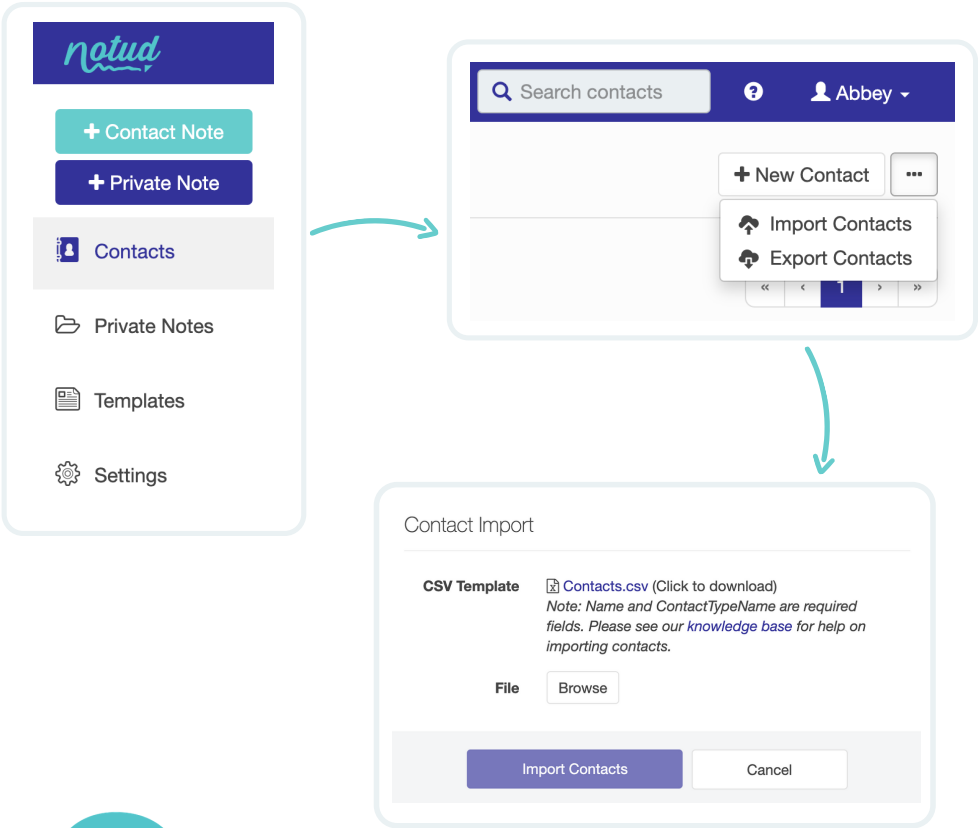
Go to **Contacts**.

In the top right-hand corner there is a menu button (three dots), click the menu button and select **Import Contacts**.

Download the **Contacts.csv** and copy your client information in to the same format.

When the file has all of the details, select **Browse** in the Contact Import pop up, choose your client file, and **Import Contacts**.

If you have a lot of Contacts, this may take a minute and you will be directed to Notud when it has successfully synced.

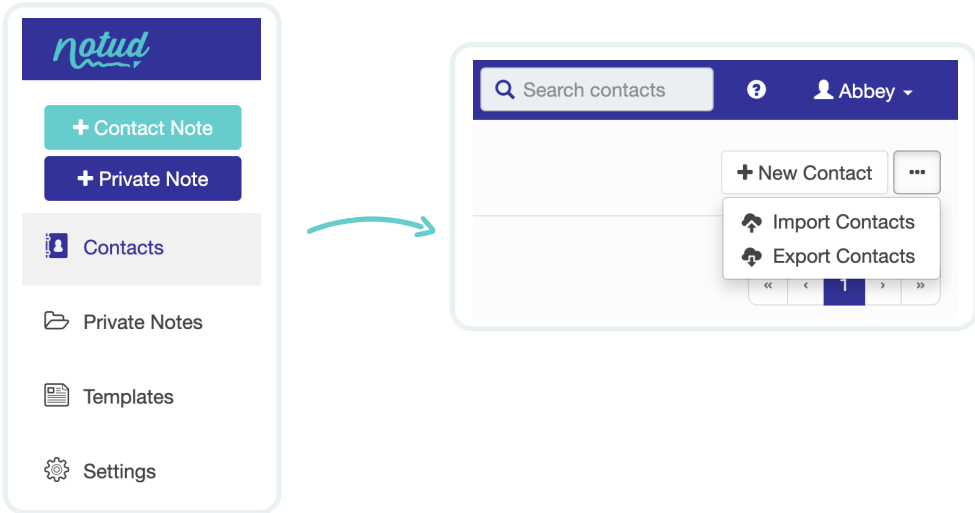


# Export Contacts

Go to **Contacts**.

In the top right-hand corner there is a menu button (three dots), click the menu button and select **Export Contacts**.

Your Contacts will automatically download in to a .csv file.

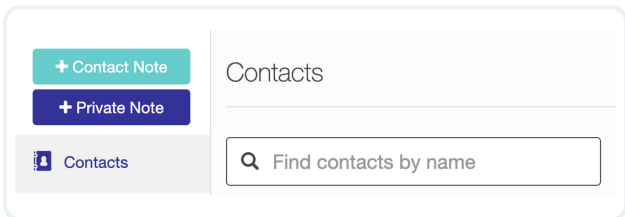
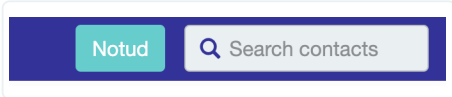


# Edit Contact Details

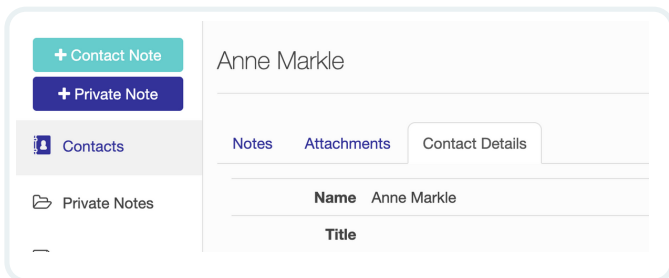
Go to **Contacts**.

Select the Contact you would like to edit.

**Tip:** Use the search bar in the top right hand corner of Notud or at the top of the Contacts page.

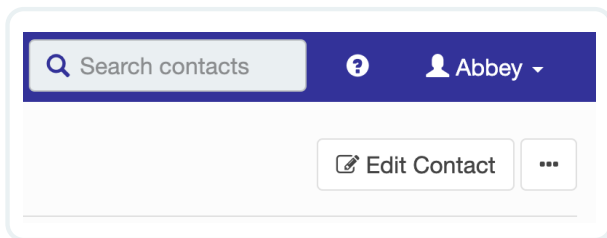


Go to the tab **Contact Details**.



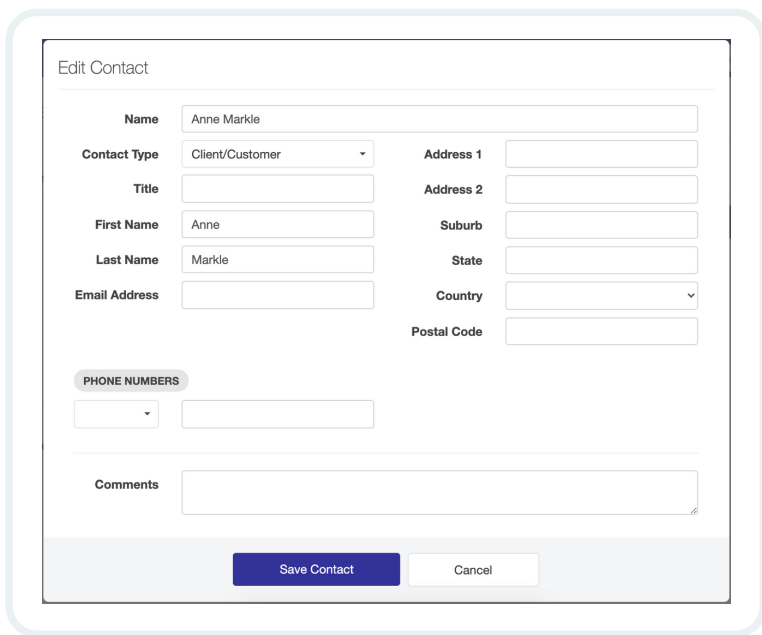
A screenshot of the 'Contact Details' tab in the Notud interface. On the left, there is a sidebar with a '+ Contact Note' button (teal), a '+ Private Note' button (dark blue), a 'Contacts' section with a person icon and the word 'Contacts', and a 'Private Notes' section with a folder icon. The main area shows the contact name 'Anne Markle' at the top. Below it are three tabs: 'Notes', 'Attachments', and 'Contact Details' (which is selected). Under the 'Contact Details' tab, there are two fields: 'Name' with the value 'Anne Markle' and 'Title' which is currently empty.

In the top right-hand corner, select **Edit Contact**.



A screenshot of the top right corner of the Notud interface. It features a dark blue header bar containing a search bar with the text 'Search contacts', a help icon (question mark), and a user profile icon labeled 'Abbey' with a dropdown arrow. Below this header, there are two buttons: 'Edit Contact' (with a pencil icon) and a three-dot menu button.

Make your changes and **Save Contact**.



A screenshot of the 'Edit Contact' form in Notud. The form is titled 'Edit Contact' and contains several fields for contact information. The 'Name' field is pre-filled with 'Anne Markle'. The 'Contact Type' is a dropdown menu set to 'Client/Customer'. Other fields include 'Title', 'First Name' (Anne), 'Last Name' (Markle), 'Email Address', 'Address 1', 'Address 2', 'Suburb', 'State', 'Country' (a dropdown), and 'Postal Code'. There is a section for 'PHONE NUMBERS' with a dropdown and an input field. At the bottom, there is a 'Comments' text area. The form has a 'Save Contact' button (dark blue) and a 'Cancel' button (white) at the bottom right.



**Note:** For Xero users, you can edit contact details in Xero and they will automatically sync to Notud.

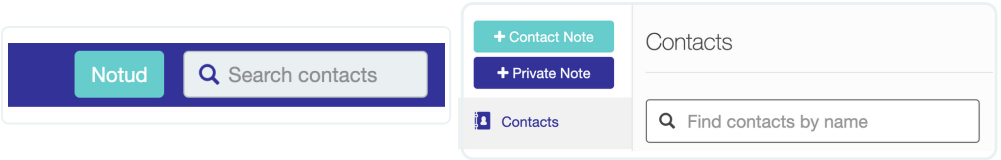


# Add Attachments

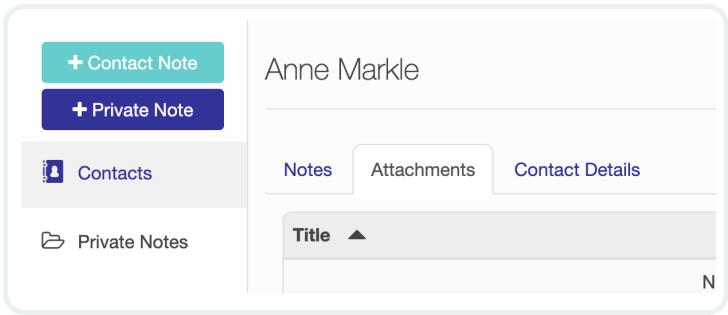
Go to **Contacts**.

Select the Contact you would like to add an attachment to.

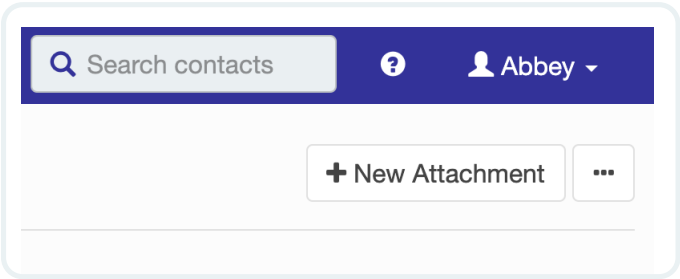
**Tip:** Use the search bar in the top right-hand corner of Notud or at the top of the Contacts page.



Go to the tab **Attachments**.

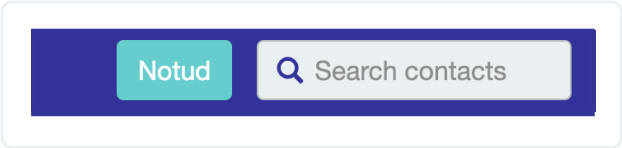


In the top right-hand corner select **+ Add Attachment**, find your file and **Save Attachment**.



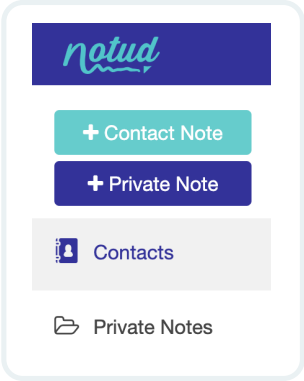
# Search Contacts

The quickest and easiest way to search for Contacts is to use to search bar at the top of Notud.

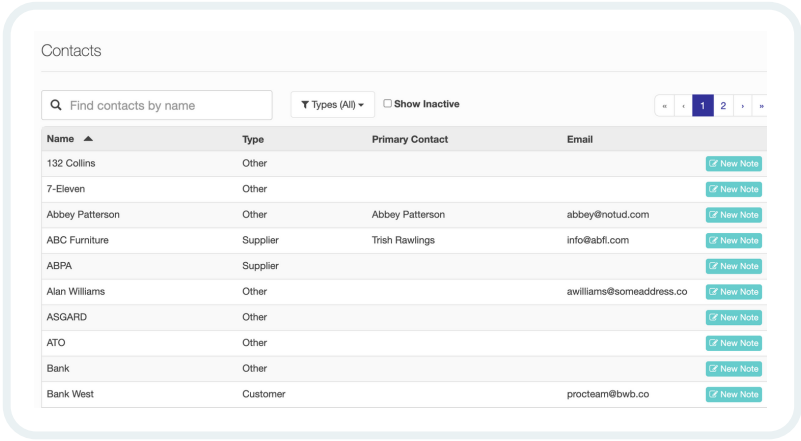


You can also view and search for Contacts by going to:

**Contacts** in the left hand side menu.



Here you can view and scroll through your Contacts, or use the search bar at the top.



# Contact Types

Name ▲	Type
Anne Markle	Client/Customer

You can make your own Contact Types in Notud so you can sort and filter contacts to view.

Note: If you are integrated with Xero, update your Contact Types in Xero, and they will automatically sync and update in Notud.



## Create a Contact Type

Go to **Settings**.

Under **Contacts and Notes**, select **Contact Types**.

+ Contact Note

+ Private Note

Contacts

Private Notes

Templates

Settings

### Settings

#### Contacts and Notes

- [Note Templates](#)  
Configure custom note templates.
- [Contact Types](#)  
Customize your contact types

In the top right-hand corner, select **+ New Contact Type**.

Search contacts

?

Abbey ▾

+ New Contact Type

Enter the Contact Type Name and **Save Contact**.

## Assign or Edit a Contact Type

+ Contact Note

+ Private Note

Contacts

Private Notes

Anne Markle

Notes

Attachments

Contact Details

Name

Anne Markle

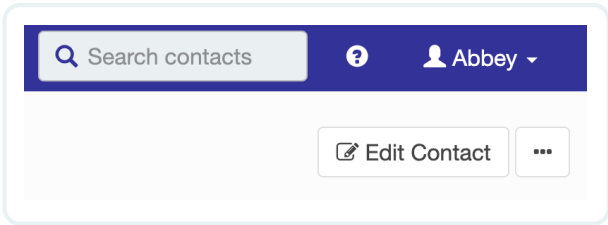
Go to **Contacts**.

Select the Contact you want to assign.

Select the **Contact Details** tab.







In the top right-hand corner select **Edit Contact**.

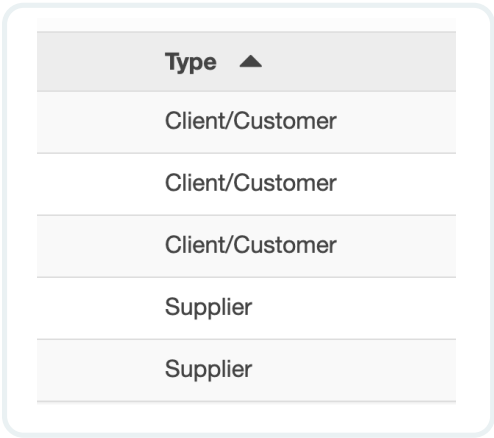
Update the **Contact Type** drop-down field.

**Save Contact.**

## Sort by Contact Type

Go to **Contacts**.

Click **Type**. Click it again to sort from top to bottom.

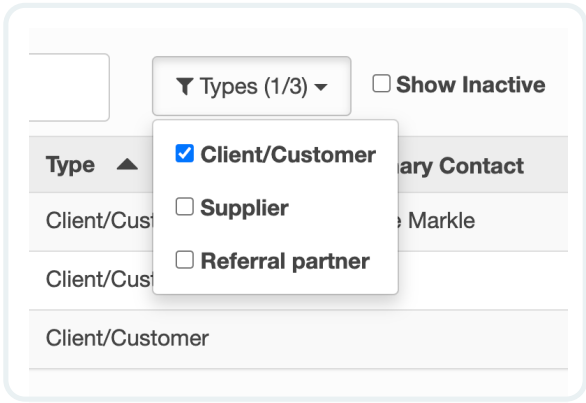


## Filter by Contact Type

Go to **Contacts**.

Select **Types**.

You will see a drop-down with all of your Contact Types. **Tick** which types you would like to view.



# NOTES

## Writing and Typing

### Writing



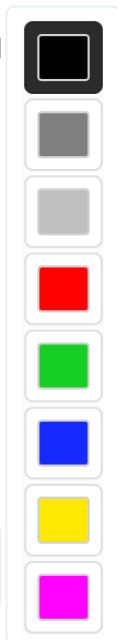
To start **writing** in a note, select the pencil icon on the left-hand side of the note.

To change the **size of the pen tip**, select the size at the top of the note.



To **erase** what you have drawn or written, select the eraser icon on the left-hand side of the note, select the size of the eraser at the top of the note, and to erase, click, hold and move around over the writing.

To change the **colour of your pen**, select the colour on the left-hand side of the note.



### Typing



To start **typing** in a note, select the 'A' icon on the left-hand side of the note.

To change the **colour of the text**, select a colour on the left-hand side of the note.

To format your text, you can change the **font, size, italic and bold** at the top of the note.



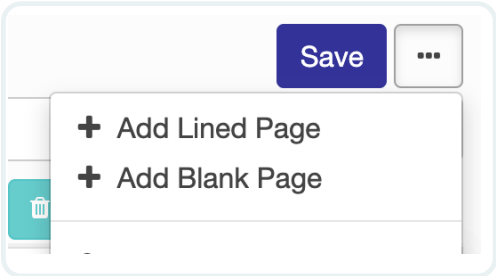
# Add & Delete a Note Page

## Add a Page to a Note

When you are in a note, you can add unlimited pages to the same note. To add a page:

Click the **menu** button (three dots) in the top right-hand corner of the page.

Select **+ Add Lined Page** or **+ Add Blank Page**.



Move between the pages by selecting the page numbers and arrows that are now visible at the top of the page.

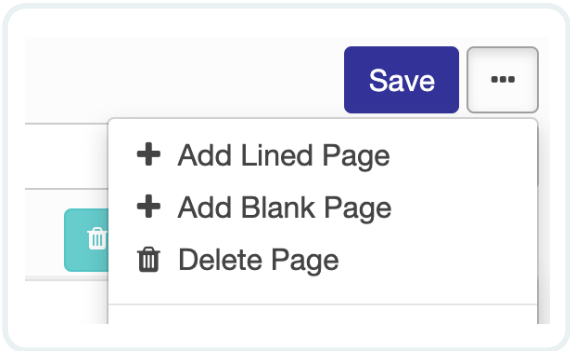


## Delete a Page in a Note

To delete a page, in the note go to the page you wish to delete by using the page numbers and arrows at the top of the page.

Click the **menu** button (three dots) in the top right-hand corner of the page.

Select **Delete Page**.



# Zoom & Scale



To zoom and scale a note page, select the magnifying glass icons to the top right-hand side of the note.

Select the two arrows in the top right-hand corner of the note to allow the entire screen to be the note. Click it again to undo and see all of the Notud features.



When you are zoomed in, use the pan tool on the right-hand side to scroll around the note.

# Add an Image



To add an image to a note, select image icon on the right-hand side of the note.

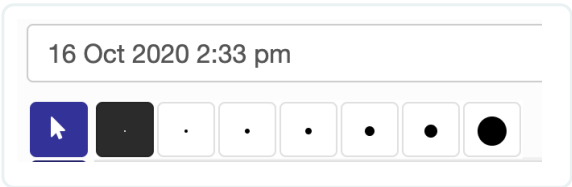
Select the image from your device.

Select **Open**.

Now the image is on the page, you can move it to where you need it, and re-size the image.

# Rename an Note

When you are in a note, you can name your image at the top of the note.



# Lock a Note

You can lock a note so it cannot be edited any further.

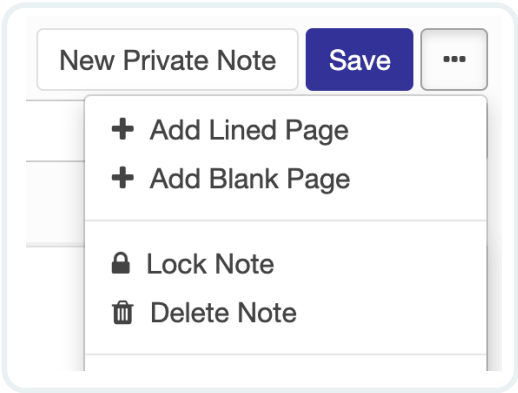
**Note:** If a note is locked, it restricts all team members from editing, including the person who created the note.

To lock a note:

Open the note.

Click the **menu** button (three dots) in the top right-hand corner of the page.

Select **Lock Note**.



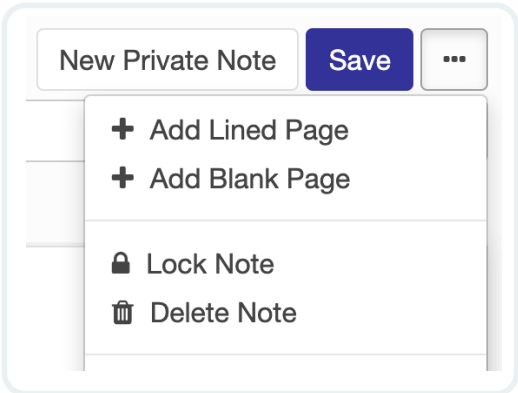
# Delete a Note

To delete an entire note:

Open the note you would like to delete.

Click the **menu** button (three dots) in the top right-hand corner of the page.

Select **Delete Note**.



# Export or Print a Note

## Export

To export a note, go in to the note page.

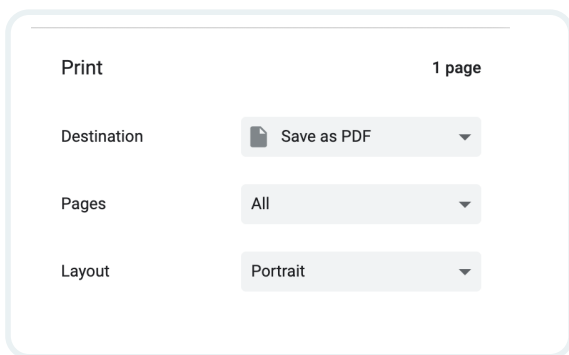
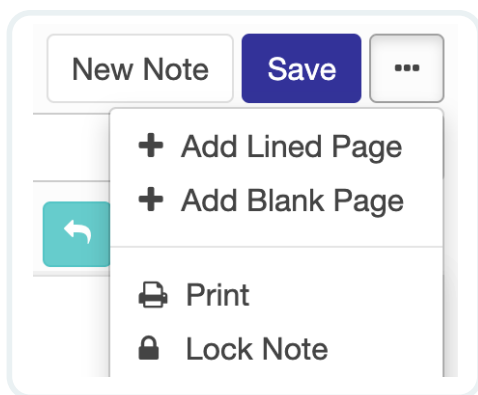
Click the **menu** button (three dots) in the top right-hand corner of the page.

Select **Print**.

In the print options that open, update **Destination** to **Save to PDF**.

Select **Save**.

To **print**, choose your Printer in the **Destination** drop-down field, and select **Print**.



# CONTACT NOTES

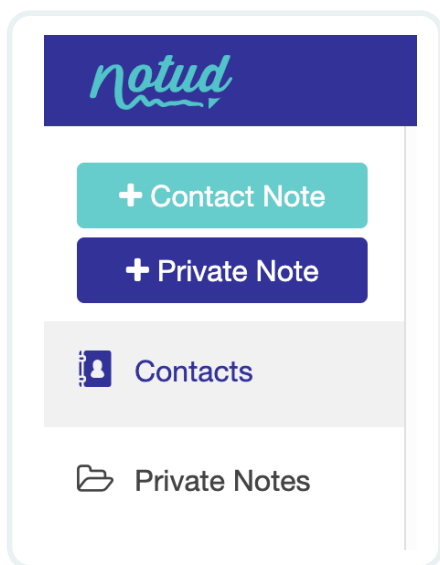
## Create a Note

### Dashboard

Select + **Contact Note** on the left-hand side of the page.

Choose the Contact.

Select the note template to use.

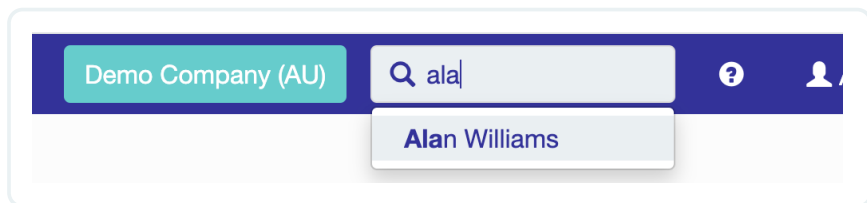


### Main search bar

At the top, right-hand corner of Notud, there is a search bar. Start typing the name of the Contact and select them when they appear.

Select **Create Note** to the right-hand side of their details.

Select the note template to use.



# Contacts

From the dashboard, select Contacts.

Search for the Contact to refine the Contacts you can see, or scroll through the list until you see the Contact.

Here you can select **New Note**.

Name ▲	Type	Primary Contact	Email	
Alan Williams	Other		awilliams@someaddress.co	<a href="#">New Note</a>

Or from the Contact list, you can select the Contact.

Select **New Note** in the top right-hand corner.

Q Search contacts

?

Abbey ▾

+ New Note

...

Select the note template to use.



When you are logged in to Xero, go in to the Contact Details of the Contact.

On the right-hand side of the screen, select **Create Notud**.

Contact Details

^

Contact Person

awilliams@someaddress.co

Skype +123demo

☐

Links

Create Notud

Existing Notud

Private Notud





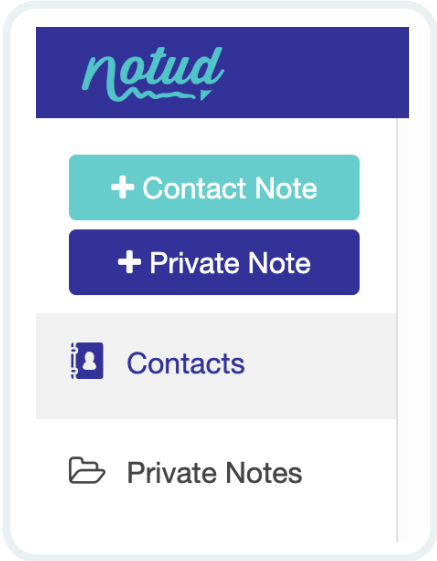
# Access a Note

## Contacts

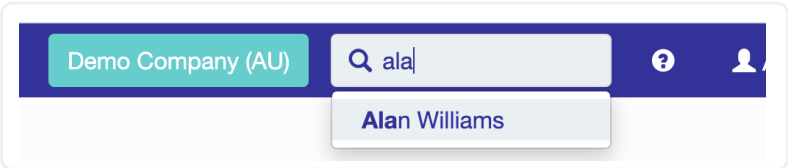
Go to **Contacts**.

Select the Contact.

Under the **Notes** tab you will see all of the notes. Click on a note to view and edit it.



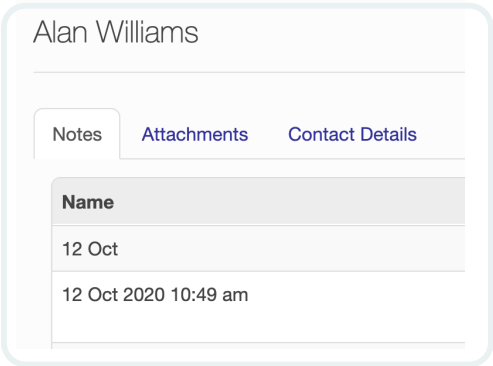
## Main search bar



At the top, right-hand corner of Notud, there is a search bar. Start typing the name of the Contact and select them when they appear.

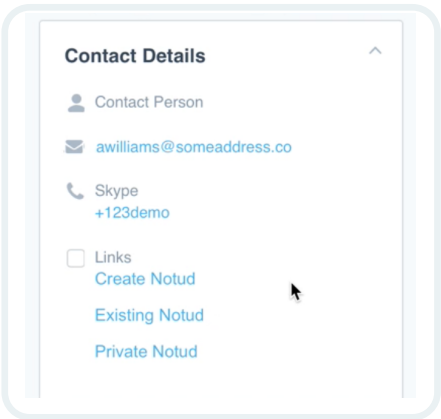
Select the Contact.

Under the Notes tab you will see all of the notes. Click on a note to view and edit it.



When you are logged in to Xero, go in to the Contact Details of the Contact.

On the right-hand side of the screen, select **Existing Notud**.

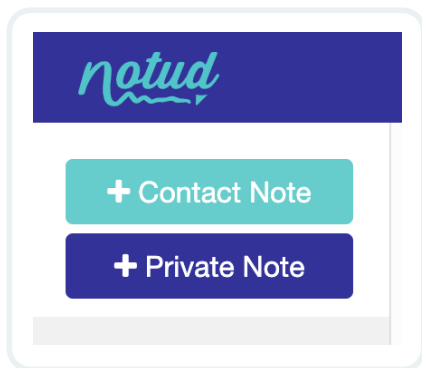


# PRIVATE NOTES

## Create a Note

### Dashboard

Select + **Private Note** on the left-hand side of the page.

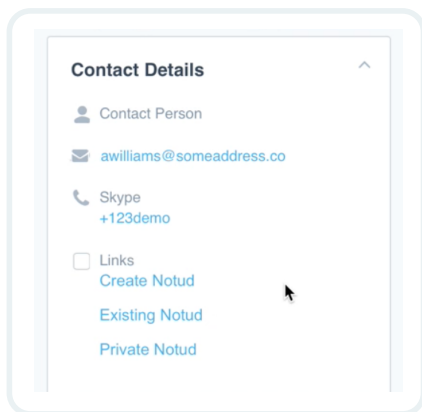


### Xero



When you are logged in to Xero, go in to the Contact Details of a Contact.

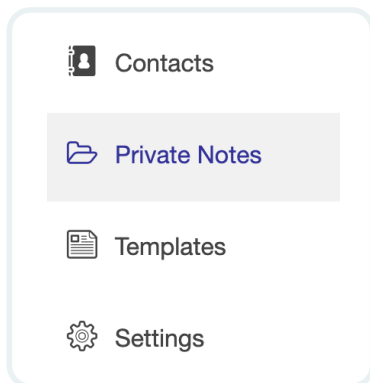
On the right-hand side of the screen, select **Private Notud**.



## Access a Note

Select **Private Notes** on the left-hand side of the screen.

You will see all of your notes here. Click on a note to view and edit it.

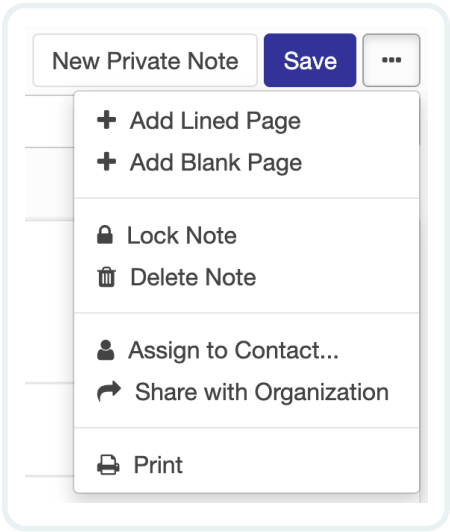


# Share a Note

## Share from within a note

When you are in a note, go to the **menu** icon in the top right-hand corner of the note.

Select **Share with Organization**.



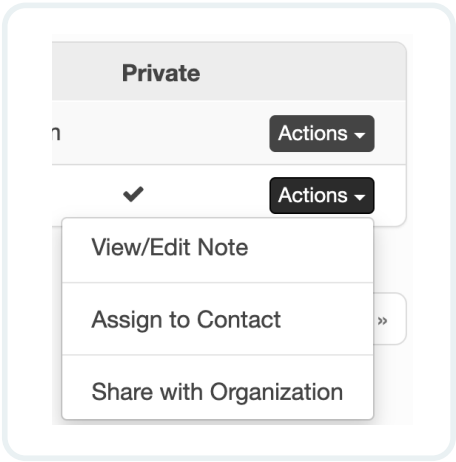
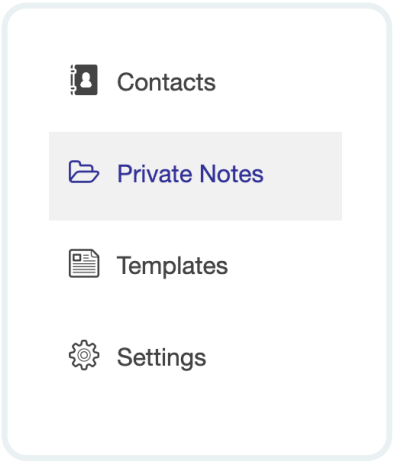
## Share an existing note

Go to **Private Notes**.

You will see all of your notes here. Find the note to share.

On the right-hand side of the line, select **Actions**.

Select **Share with Organization**.

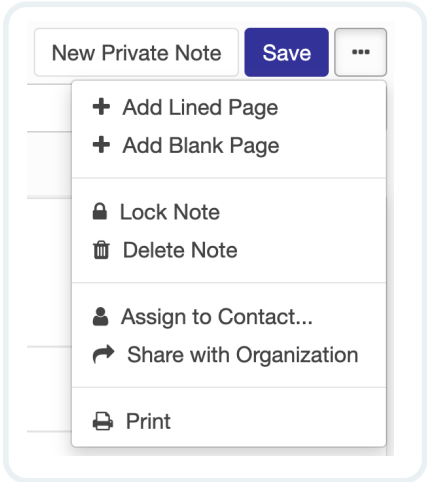


# Assign a Note to a Contact

## Assign from within a note

When you are in a note, go to the **menu** icon in the top right-hand corner of the note.

Select **Assign to Contact**.



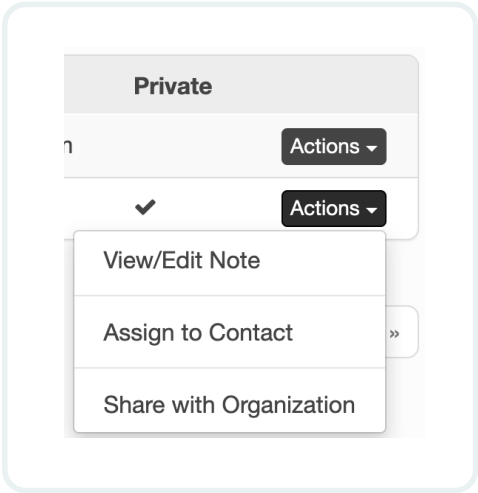
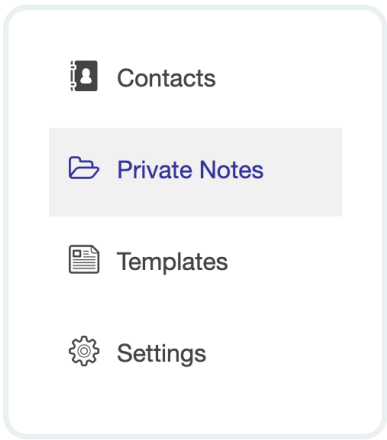
## Assign an existing note

Go to **Private Notes**.

You will see all of your notes here. Find the note to share.

On the right-hand side of the line, select **Actions**.

Select **Assign to Contact**.



# NOTE TEMPLATES

## Create a Note Template

You can create and customise your own note templates, so you have quick and easy access to information, forms, structures, custom client details, images and more when you need them.

**Note:** Custom templates can be used for Contact Notes. The default Lined or Blank templates can be used for both Contact and Private Notes.

 Contacts

 Private Notes

 **Templates**

 Settings

To create a new template:

Go to **Templates**.

In the top right-hand corner, select **+ New Template**.

Name your template.

  Abbey ▾

**+ New Template**

◀ **Note Templates**

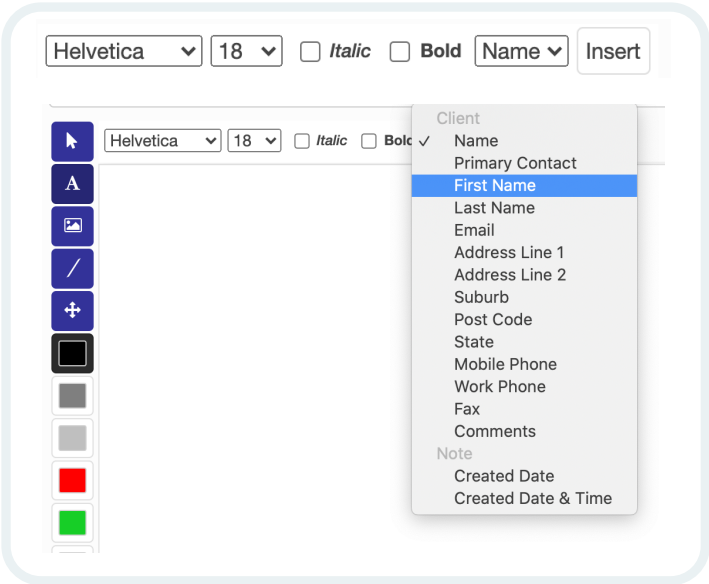
Note Template Title

# Add Text and Custom Fields



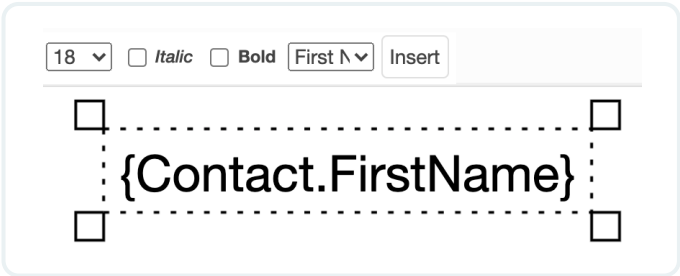
Select the **text** icon and click anywhere on the note to begin typing.

To add a custom field, when you select the text icon, you will see a drop-down field with **Name** at the top of the note. Choose which field in the menu you would like to use.



Click on the note page where you would like the field to appear.

Select **Insert** at the top of the note.



When you choose a template with your custom field, the details will automatically fill in.

**Note:** To add other elements to the template, refer to the Notes pages (page 19). You can use all other tools apart from the handwriting and drawing on templates.



# Use a Note Template

When you are creating a new Contact Note all of your Templates will appear. Click on the Template to use it and the note will be created.

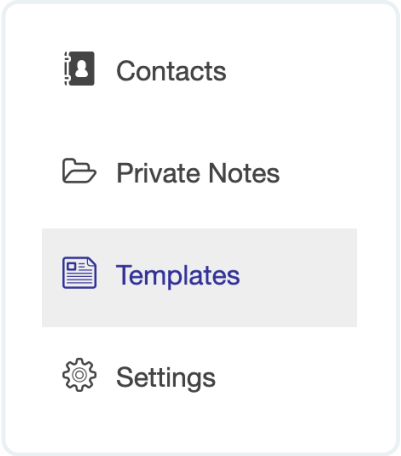
**Note:** Refer to [Contact Notes \(page 24\)](#) for more instructions on creating a new Contact Note.

# Edit a Note Template

To edit an existing template, go to **Templates**.

Click on the template you would like to edit.

Make changes and click **Save**.



# Deactivate & Activate a Note Template

If you no longer need to use a Note Template, you can deactivate it so it does not appear as an option when creating a note.

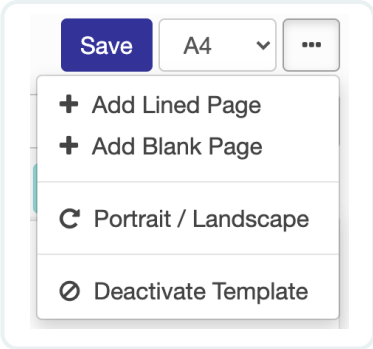
**Note:** Deactivating does not delete the template, it can be activated at any time.

Go to **Templates**.

Select the template you would like to deactivate.

Go to the **menu** in the top right-hand corner of the page and select **Deactivate Template** from the drop-down menu.

To **activate**, follow the same process and select **Re-activate Template** from the drop-down menu.



# TEAMS

## What is Teams?

**Note:** You can only manage Teams at Administrator level.

In **Teams** you can have multiple Notud accounts and access them with the same login. You then have the option to have different Contacts and Notes allocated to different Teams and different staff with access to specific Teams. A Team, for example, may be a different business or location.





## Access Teams

Go to **Settings**.

Under **My Teams**, select **Manage Teams**.

### My Teams

- [Manage Teams](#)  
View and manage your Notud team memberships or connect to Xero and synchronize your contacts.
- [Manage Users](#)  
Invite and manage users that can access your Notud notes.

-  **Contacts**
-  **Private Notes**
-  **Templates**
-  **Settings**

## Create a New Team

In **Teams** (refer above), under **New Team** select **+ Create a New Team**.

### New Team

Create a new Notud team to store contacts and hand written notes.

[+ Create a New Team](#)





Create a Team Name.

**Tick** the box to agree with Terms and Conditions.

**Create Team.**

### Create new team

Create a new team to store and access Notud Notes

Team Name


☐ I agree to the [User Terms](#) and [Privacy Policy](#)

Create Team


## Invite a User

### Notud Team

In **Teams** (refer page 33), under the correct Team, select **Manage Team Members**.

 Notud Demo Team

Open Notud

 [Manage Team Members](#)

In the top right-hand corner, select **+ Invite Team Member**.

Fill in the fields in the pop-up.

**Submit.**

+ Invite Team Member

Invite a team member

Invite a team member to join you in Notud. The user will receive a confirmation email to join your team.

Email

First Name

Last Name

Team Member Role

Please choose a role

Cancel

Submit



# Link a Xero Organisation

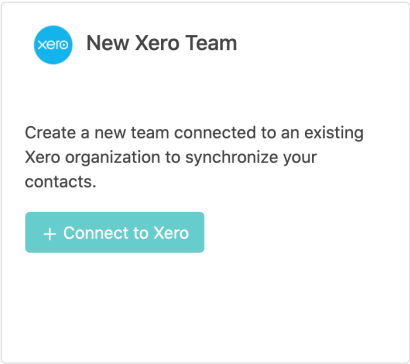


In **Teams** (refer page 33), under **New Xero Team**, select **+ Connect to Xero**.

Login to Xero.

Select the Organisation you would like to connect as your new Team.

**Allow Access.**



# Invite a Xero User



To invite one of your team members to join your team in Notud, firstly ensure they have access to the same Xero file as you have connected.

If they have access, they can sign up for Notud with Xero.

Choose the same Organisation when prompted.

**Allow Access.**

They are now signed up in the same team.

**Note:** In the same Organisation, only one person needs to set up Xero links and all users will be able to see and use them in their account. You can see the same Contacts, the same Notes, Attachments, and Details for each Contact, however you have individual Private Notes.



# Disconnect a Xero Organisation



In **Teams** (refer page 33), find the Xero Organisation and select the **menu** button (ellipses).

Select **Disconnect from Xero**.

Go to **My Account**.

Demo Company (AU)

⋮

Force Xero Sync.

Disconnect from Xero

Open Notud

Open in Xero

Xero Setup Instructions

Connected to Xero

Select the **Login Providers** tab.

Next to Xero, select **Remove**.

**Note:** You will still see the Organisation in My Teams and be able to see notes if you wish, however it will no longer be syncing with Xero.

My Account

Manage your account and login details

Profile

Email

Password

Login Providers

Two-Factor Authentication

Manage your login providers

Registered Logins

Xero

Remove

## Remove links in Xero



In Xero, go to **Organisation Settings**.

Select **custom contact links**.

You will see the table with three rows. Select the 'x' on the right-hand side of the line and **Save** when they are all removed.

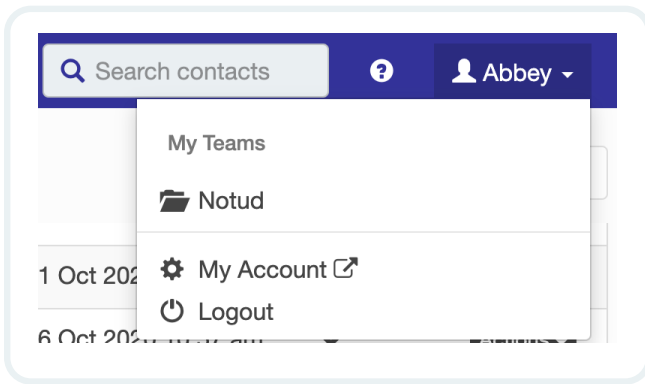


# MY ACCOUNT

## Access My Account

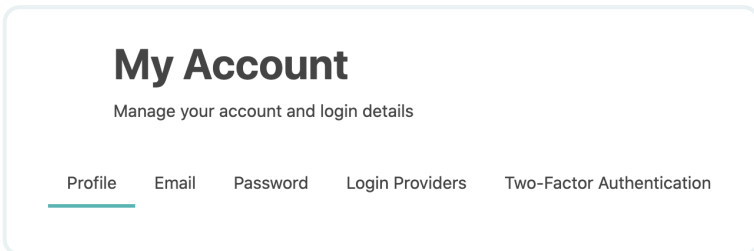
Click on your name in the top right-hand corner of the page.

From the drop-down select **My Account**.



## Update your Name or Email

When you are in My Account, select the **Profile** tab to update your name, or the **Email** tab to update your email address.



# Update your Password

When you are in My Account (refer page 37), select the **Password** tab.

Enter your current password.

Enter your new password in the two provided fields.

**Update password.**

# Two-Factor Authentication

When you are in My Account (refer page 37), select the **Two-Factor Authentication** tab.

Select **Add authenticator app**.

Two-factor authentication (2FA)

Authenticator app

Add authenticator app

Follow the instructions in the pop-up window (your unique codes will appear where blacked out below).

Enter the verification code once you have scanned or entered the code in the authenticator app and **Verify**.

Configure authenticator app

To use an authenticator app go through the following steps:

1. Download a two-factor authenticator app like Microsoft Authenticator for Android and iOS or Google Authenticator for Android and iOS.

2. Scan the QR Code or enter this key  into your two factor authenticator app. Spaces and casing do not matter.

3. Once you have scanned the QR code or input the key above, your two factor authentication app will provide you with a unique code. Enter the code in the confirmation box below.

Verification Code

Verify

Two-Factor Authentication is successfully set up.

Save the Recovery Codes in a safe spot (they are blanked out in red here as you will have unique codes).

## My Account

Manage your account and login details

Profile   Email   Password   Login Providers   Two-Factor Authentication

Your authenticator app has been verified.



### Recovery codes

**Put these codes in a safe place.**

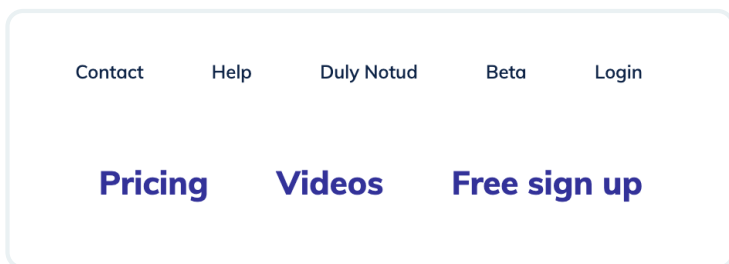
If you lose your device and don't have the recovery codes you will lose access to your account.



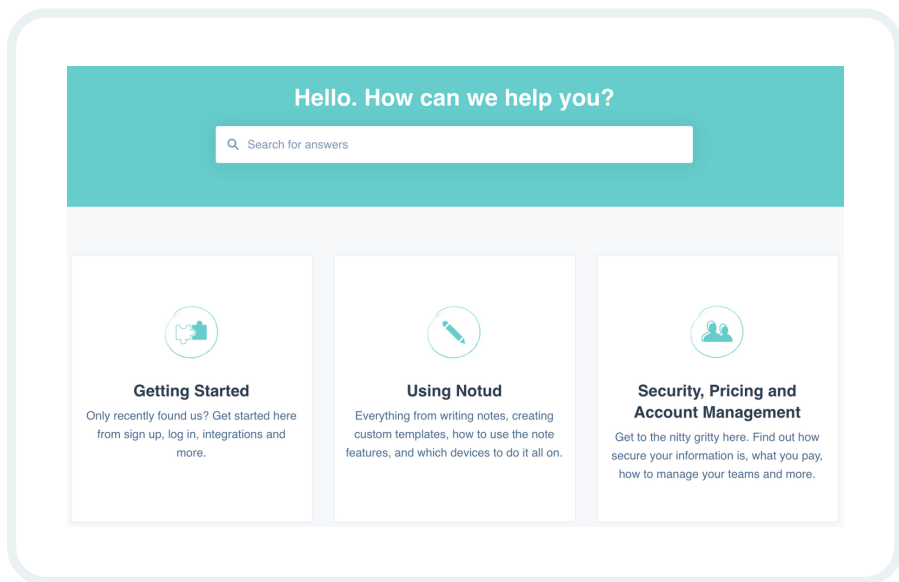
# SUPPORT

## Online Help Guide

Go to <https://help.notud.com> or access the Help Guide from the home page of the website (<https://www.notud.com>)



Search for keywords or select one of the headings to view all help articles.



# Contact Us

If your question hasn't yet been answered in the Help Guide, send us a message.

Go to <https://www.notud.com/contact> or access the Contact form from the home page of the website.

ContactHelpDuly NotudBetaLogin

PricingVideosFree sign up

Have some questions?

## Contact Us

First name\*

Last name

Email\*

Message\*

Submit

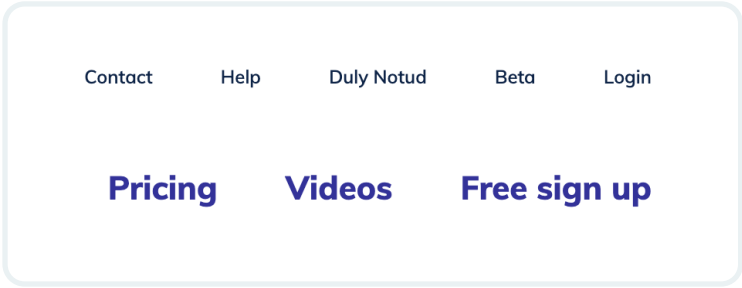




# Videos

If you're not sure where to go first, the videos are a great place to start.

Go to <https://www.notud.com/videos> or access them from the home page of the website.



On this page you'll find demos of using Notud, information on buying your first tablet, interviews with others about Notud, and more. Each video is around 15 minutes long.

# Webinars

We hold regular live webinars which you can sign up for at <https://www.notud.com/webinars> or access on the Videos page. If you can't make live webinars, if you register we will send you the recording and they will also be available to watch at any time on the Videos page.

## Live Webinars

### Tune in to a live webinar with the Notud Team

We hold a live webinar once every month to show you the latest updates, take a deep dive in to a feature, show you how different people are using Notud, and more general topics.

[Watch Here!](#)



# SECURITY

**Notud is a cloud based system that utilises the latest security protocols to deliver fast & secure notes.**

## Integrated Security and Backup Features

- Secure User Access and Authentication
- Automated Backups
- Data Encryption
- Active System Monitoring

## Availability and Disaster Recovery

- Deployed to multiple Azure Availability Zones in the Australia region
- Automatic failover of web servers in the event of an outage
- Database replication using Azure Failover Groups  
<https://docs.microsoft.com/en-us/azure/sql-database/sql-database-geo-replication-overview>

## Data Storage and Security

- Encryption at rest (Azure SQL Databases - Transparent data encryption)  
<https://docs.microsoft.com/en-us/sql/relational-databases/security/encryption/transparent-data-encryption-azure-sql?view=azuresqldb-current>
- Advanced pro-active threat-detection and auditing (Azure SQL Databases - Advanced Threat Protection) <https://docs.microsoft.com/en-us/azure/sql-database/sql-database-threat-detection>  
<https://docs.microsoft.com/en-us/azure/sql-database/sql-database-auditing>



## Backups

- Automated Backups
- Replicated to multiple geographic regions <https://docs.microsoft.com/en-us/azure/sql-database/sql-database-automated-backups>

## Security

- Adopted open standards
- All web-based traffic is secured using HTTPS/Transport Layer Security
- OpenID Connect for Authorization
- Hosted on Platform as a Service (PaaS)
- Secure development practices
- Data access policies

## Data Protection

While Notud always maintains a high level of data protection, we have further addressed our GDPR. The GDPR's requirements apply to EU residents' personal data and anyone involved with Notud who processes that information. The GDPR has key principles and data subject rights which are addressed in our Data Processing Addendum (refer to website to download), and it outlines Notud's commitment to meeting and being accountable to these.

See more about our Data Protection on the website.

# NO-LOGIN NOTES

## What are No-Login Notes?

Using these notes means you can start note taking even faster as you don't need to log in to your account. Simply open Notud, write your notes, and from here you can:

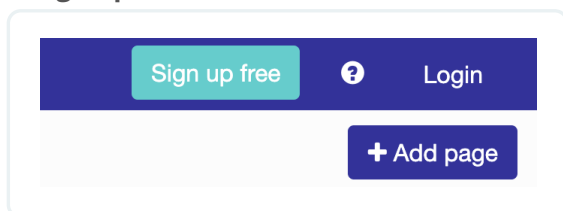
- Sign up and save the note to your account
- Login and save the note to your account
- Copy a link to the note and save it, or send it to someone
- Email the note
- Save the note to PDF or Print

## Access No-Login Notes

Go to <https://app.notud.com> or access from the home page of the website.

## Sign Up and Save Note

After you have written your note, go to the top right-hand corner of the screen and select **Sign up free**.



Enter your details to sign up OR sign up using Xero on the right-hand side of the screen.

**Note:** For more details on signing up refer to page 5.

When signed up your note will open in Notud as a new Private Note.

You can continue to edit and write on your note here, or click on **Private Notes** in the top left-hand corner to go to the main dashboard.

For more Private Note features refer to page 27, and for note features refer to page 19.

## Login and Save Note

After you have written your note, go to the top middle of the page and select **Save or share**.

Select **Save to my Notud account**.

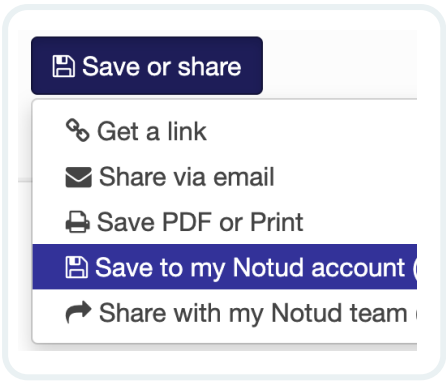
**Continue and save.**

Enter your login details.

Your note will open in Notud as a new Private Note.

You can continue to edit and write on your note here, or click on **Private Notes** in the top left-hand corner to go to the main dashboard.

For more Private Note features refer to page 27, and for note features refer to page 19.

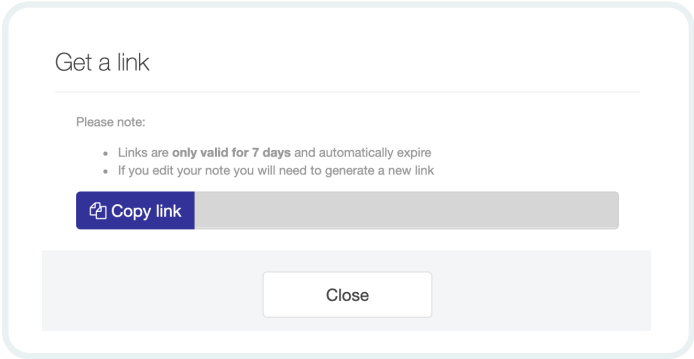
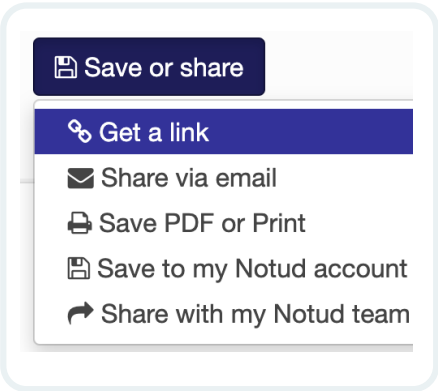


# Send a Link

After you have written your note, go to the top middle of the page and select **Save or share**.

Select **Get a link**.

Select **Copy link**.

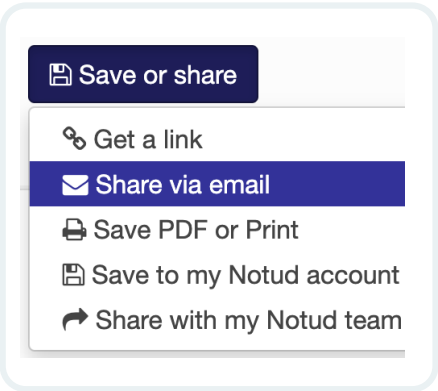


Paste the link and share your preferred way.

# Email a Link

After you have written your note, go to the top middle of the page and select **Save or share**.

Select **Share via email**.



Enter the details in the pop-up and select **Share note**.

Share via email

Email to:

Your email:

Message:

Please note:

- Links are **only valid for 7 days** and automatically expire
- If you edit your note you will need to generate a new link

You will now receive a pop-up and an email with a unique code.

Enter the unique code in the pop-up.

Your unique code is:

**096029**

Enter this unique code to confirm your email and share your note.

Share via email

PLEASE ENTER YOUR UNIQUE CODE

You will have received an email from us with your unique code, please enter the code here to finish sending!  
(P.s. check your 'Junk' inbox just in case)

Unique code:

Please note:

- Links are **only valid for 7 days** and automatically expire
- If you edit your note you will need to generate a new link



Click **Validate code**.

The note will be sent.  
The recipient and yourself will be notified via email.



# Save to PDF or Print

After you have written your note, go to the top middle of the page and select **Save or share**.

Select **Save PDF or Print**.

Your device printing preferences will appear. From here you can select your printer or save to PDF.

Save or share

Get a link

Share via email

Save PDF or Print

Save to my Notud account

Share with my Notud team

