

Smart EMR — Clone & Setup in 3 Steps

Before you start: Setup takes about 10 minutes. We recommend doing this on a desktop or tablet — some buttons may not appear on phone screens in portrait mode.

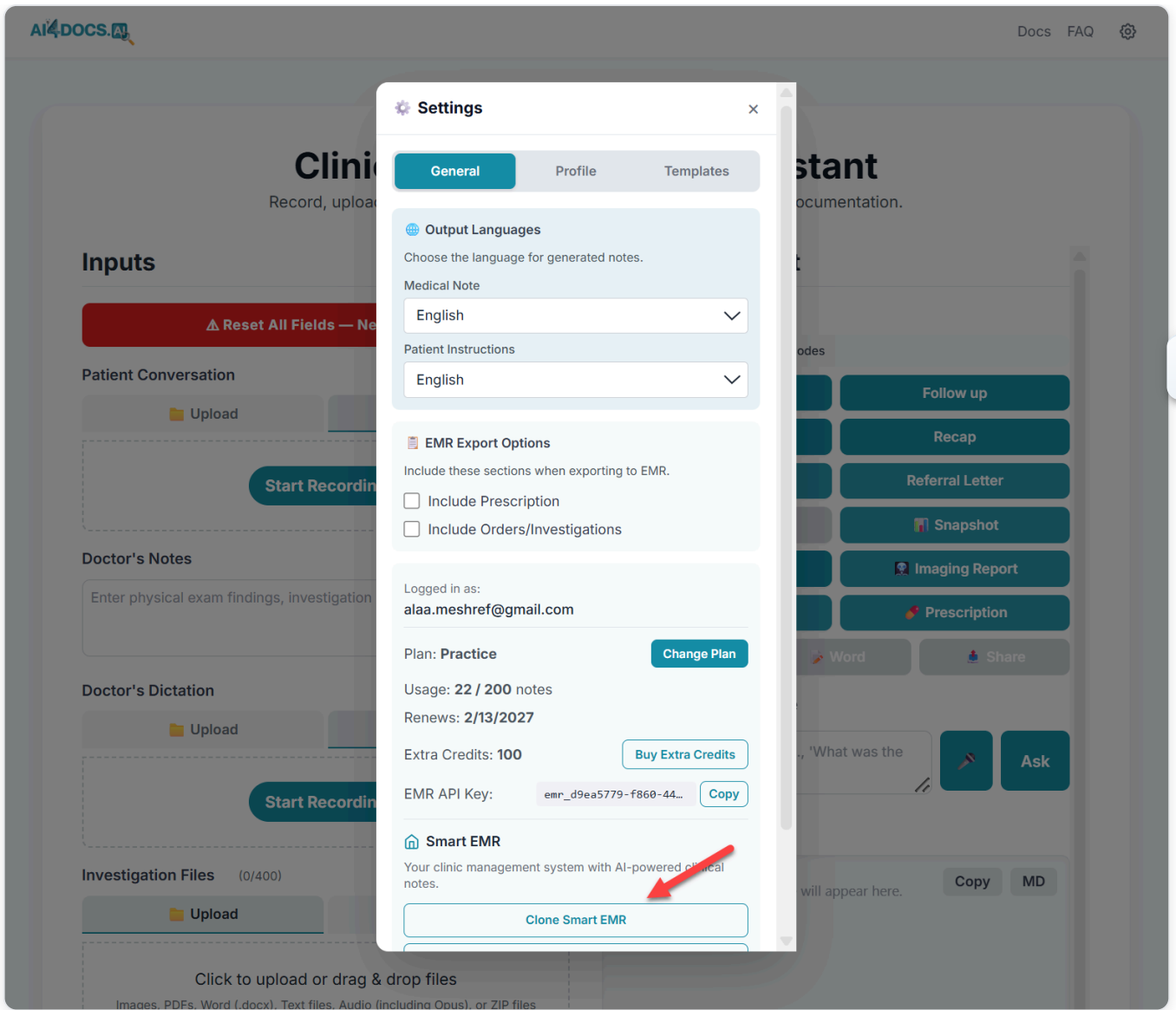
1 Clone the App (Get Your Own Copy)

The first step is to get your own personal copy of Smart EMR. This is called "cloning" the app. **This is the most important step — without cloning, you do not have the app.**

Subscription required: The "Clone Smart EMR" button only appears after you subscribe to any AI4Docs.AI CDA plan. If you have not subscribed yet, you will see a "**Subscribe to Get Smart EMR**" button instead. Subscribe first at clinic.ai4docs.ai, then return to clone.

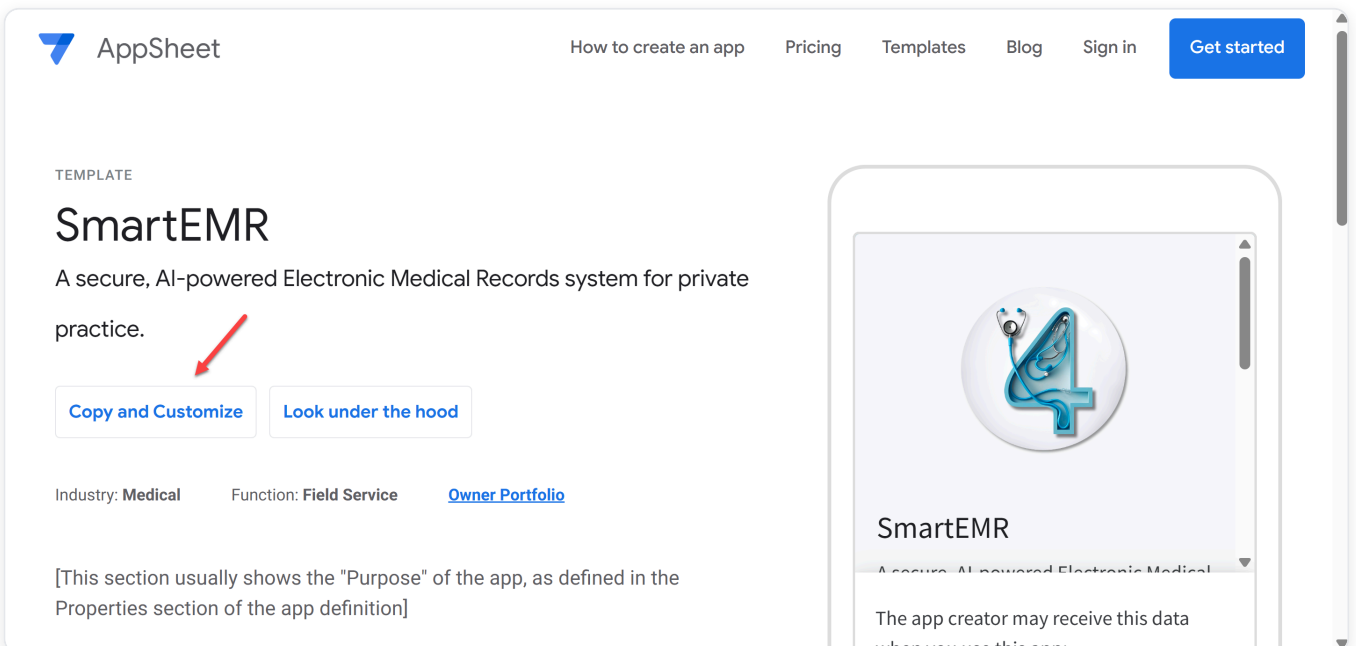
1. Open the **CDA app** on your computer browser: go to clinic.ai4docs.ai and sign in
2. Click the **Settings** icon (gear icon)
3. In the Settings panel, scroll down to the bottom. You will see a section called **Smart EMR** with a button that says "**Clone Smart EMR**" (only visible to subscribers)
4. Click the "**Clone Smart EMR**" button





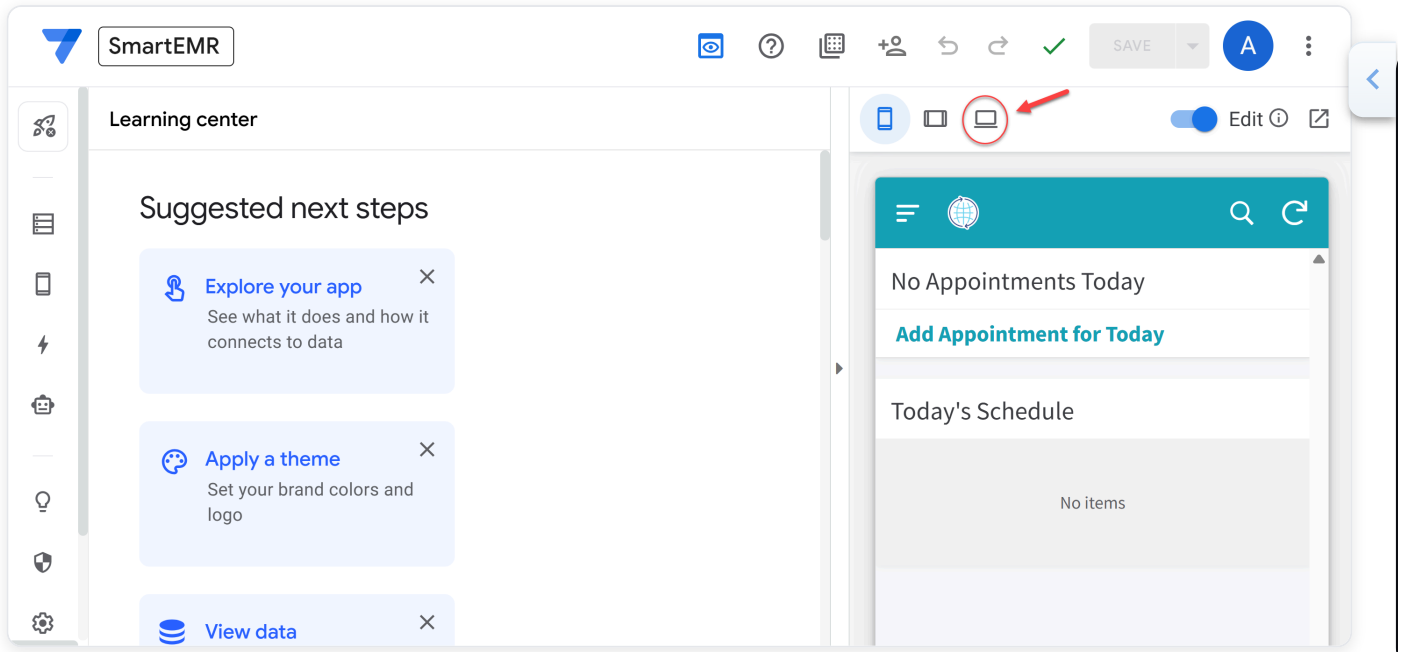
CDA Settings — scroll to the bottom and click "Clone Smart EMR"

5. A new browser tab opens showing the AppSheet template. Click the **"Copy"** button to create your personal copy of the app



Click "Copy" to create your personal copy of Smart EMR

6. Wait a few seconds while AppSheet creates your copy. When it is done, your brand new Smart EMR app opens in the AppSheet editor
7. You now have your own Smart EMR! A Google Sheets file called "**Visits**" has been automatically created in your Google Drive (inside the AppSheet/data/SmartEMR-XXXXX folder)



Smart EMR desktop view — your app is ready for setup

What just happened? AppSheet created a complete copy of Smart EMR in your Google account. You now own the app and its data. The Google Sheet stores all your patient data in your own Google Drive — nobody else can access it.

Installing AppSheet on Your Devices

Smart EMR runs on a platform called **AppSheet** (made by Google). You need to install it on every device where you (or your staff) will use Smart EMR.

On iPhone or iPad

1. Open the **App Store**
2. Search for **AppSheet**
3. Install the app by Google (purple/blue icon)
4. Open AppSheet and sign in with your **Gmail address** — the same one you used for AI4Docs.AI CDA

On Android Phone or Tablet

1. Open the **Google Play Store**

2. Search for **AppSheet**
3. Install the app by Google
4. Open AppSheet and sign in with your **Gmail address** — the same one you used for AI4Docs.AI CDA

On a Computer (Windows or Mac)

No installation needed. Smart EMR runs in your web browser. After cloning, go to www.appsheet.com, sign in, and your Smart EMR app will be listed. Bookmark it for easy access.

Important: Always use the **same Gmail address** everywhere — for AI4Docs.AI CDA, for AppSheet, and for Smart EMR setup. If you use different emails, things will not connect properly.

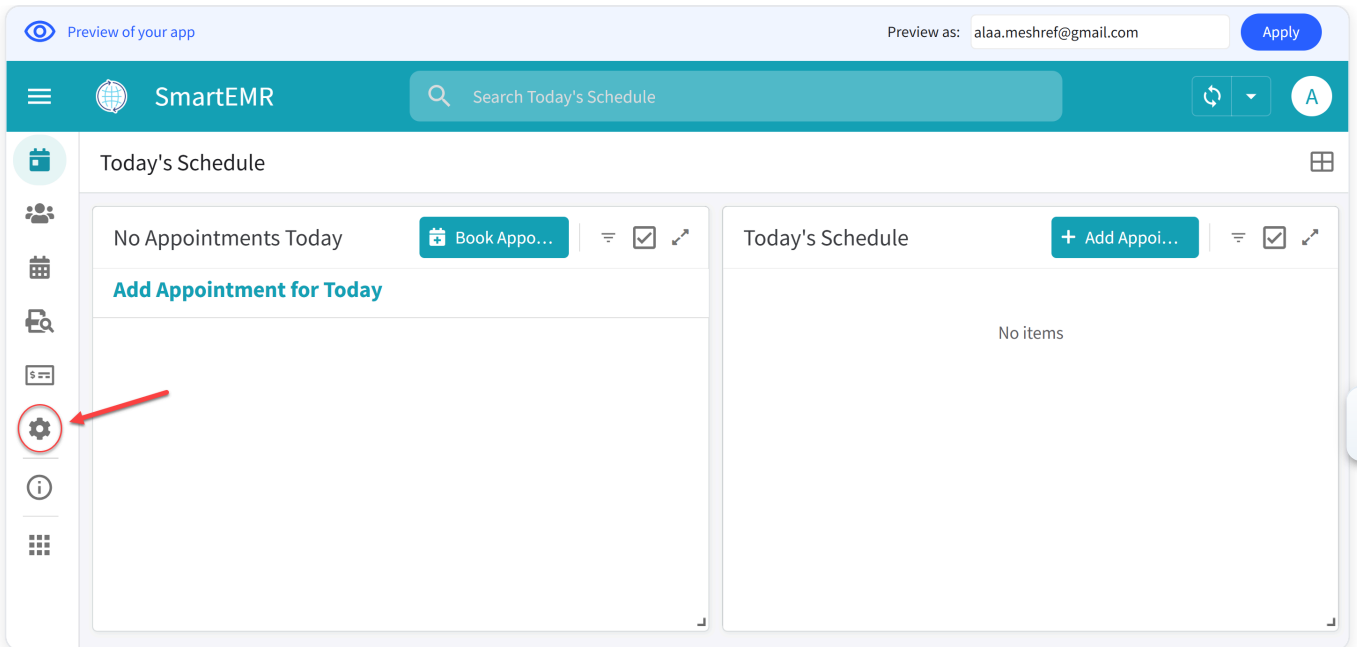
2 Add Your Admin Account

When you first open Smart EMR after cloning, it has a placeholder user (`SETUP_REQUIRED@clinic.com`). You need to add yourself as the real administrator, then remove the placeholder.

⚠ IMPORTANT ORDER: First **ADD** a new row with your Gmail address and "Admin" role. Only **AFTER** your row is saved, **DELETE** the placeholder row (`SETUP_REQUIRED@clinic.com`). If you delete the placeholder first, you will be locked out and must re-clone the app and delete the locked one.

Part A: Open Setup

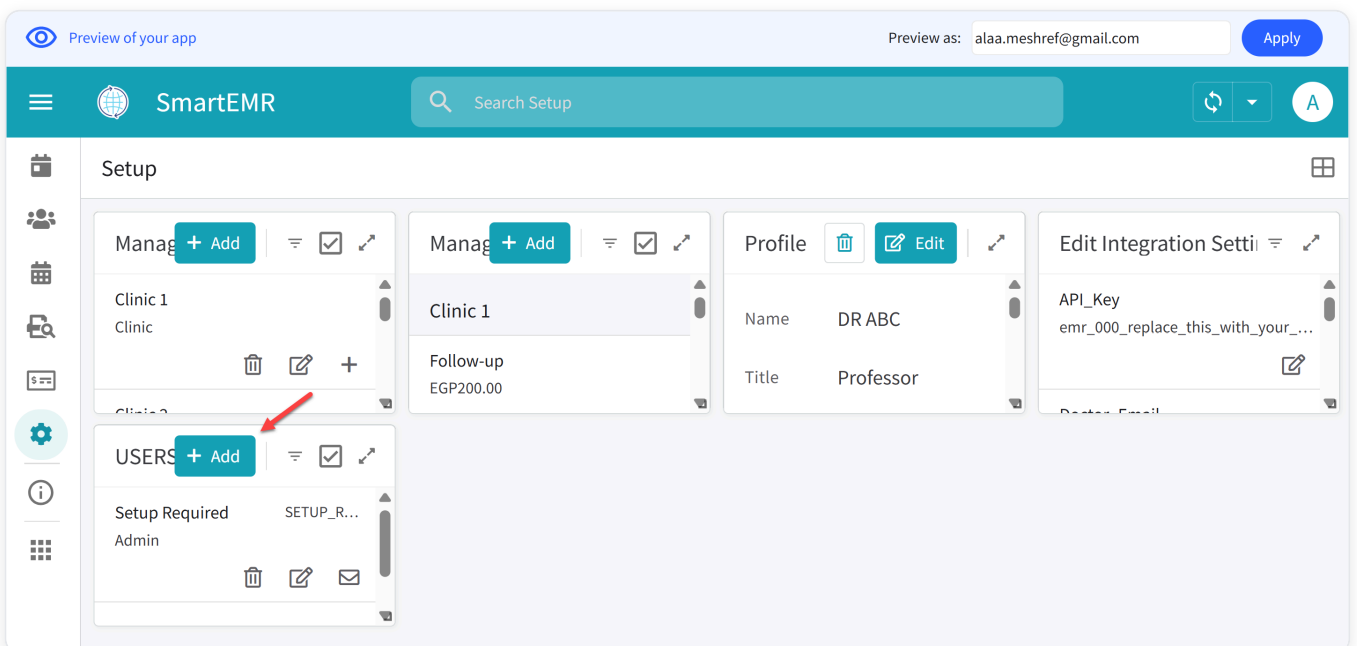
1. Open Smart EMR on your computer
2. Tap the **hamburger menu** (three horizontal lines at the top left corner)
3. Tap **Setup** (gear icon)



Tap the hamburger menu, then tap Setup to access configuration

Part B: Add Your Admin Account

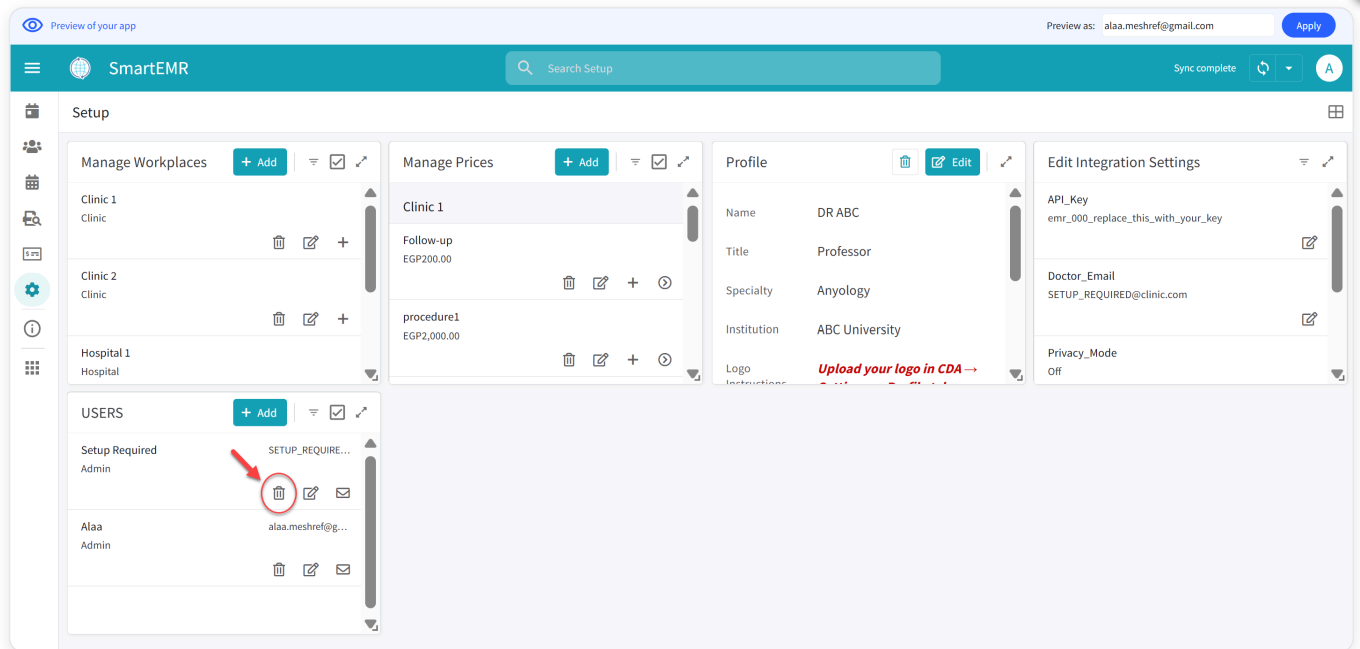
4. Tap the **USERS** tab at the top of the Setup screen
5. Tap the **Add** button (+ icon) to create a new user
6. Fill in:
 - **Email:** Your real Gmail address (must be the same as your CDA and AppSheet account)
 - **Name:** Your full name (e.g., "Dr. Ahmed Mohamed")
 - **Roles:** Check the box next to **Admin**
 - **Active:** Set to **Yes**
7. Tap **Save**



Add yourself as Admin — enter your Gmail, name, and check the Admin role

Part C: Delete the Placeholder User

8. Go back to the **USERS** tab
9. Tap on the entry with the email `SETUP_REQUIRED@clinic.com`
10. Tap **Delete** to remove this placeholder user
11. Confirm the deletion



Delete the `SETUP_REQUIRED` placeholder — only after your admin row is saved

After saving, you must sync the app:

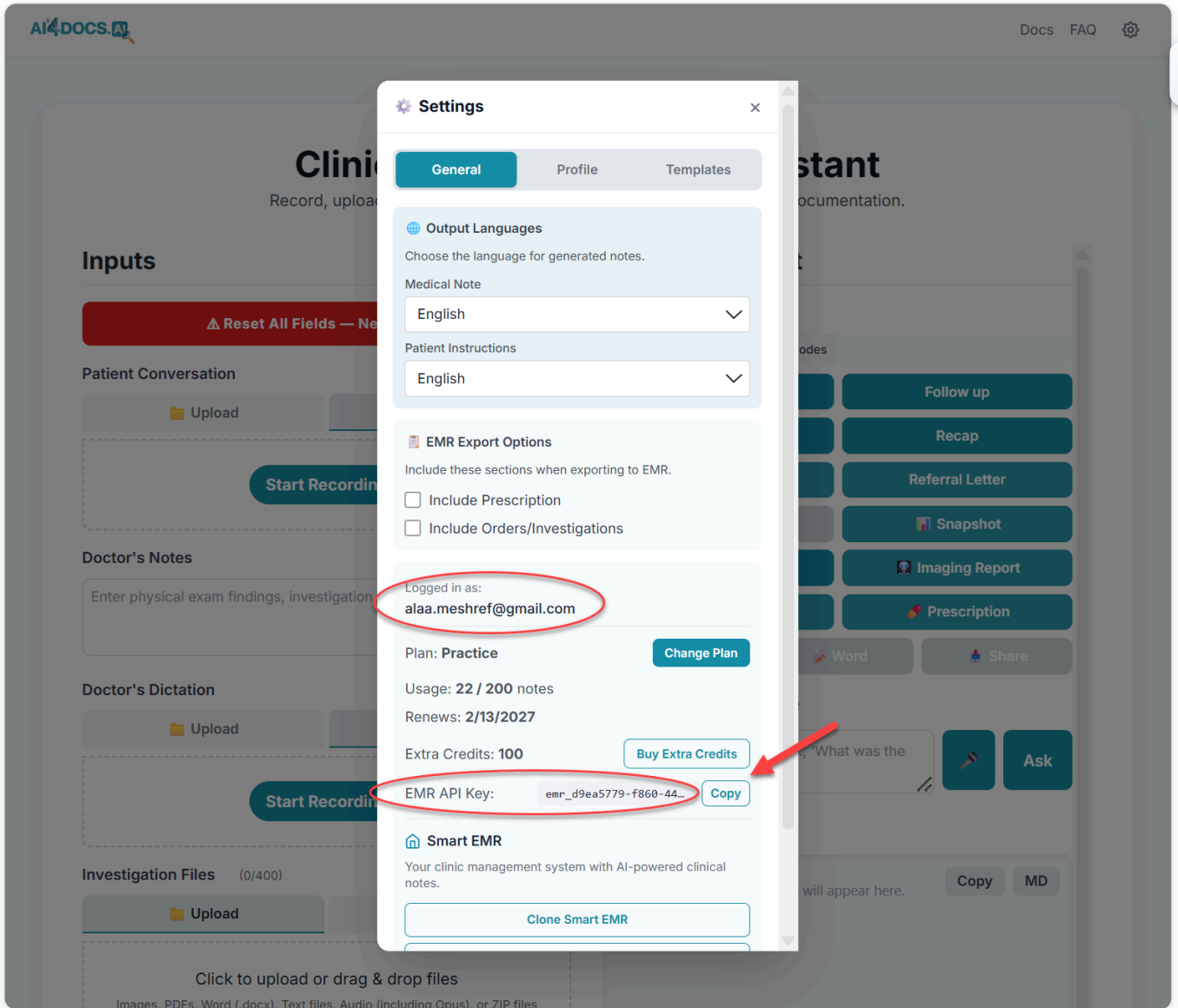
- **On phone/tablet:** Pull down from the top of the screen (like pulling a curtain)
- **On computer:** Click the circular refresh icon at the top right
- **This is called "Sync."** You will need to do this frequently. The app does NOT refresh automatically — always sync manually after any action

3 Connect AI & Share Your Spreadsheet

This step connects your Smart EMR to the AI4Docs.AI Clinical Documentation Assistant (CDA) and gives the backend service access to your data. **You need three things: your API Key, your CDA email address, and your Google Sheet ID.**

Part A: Copy Your API Key from the CDA App

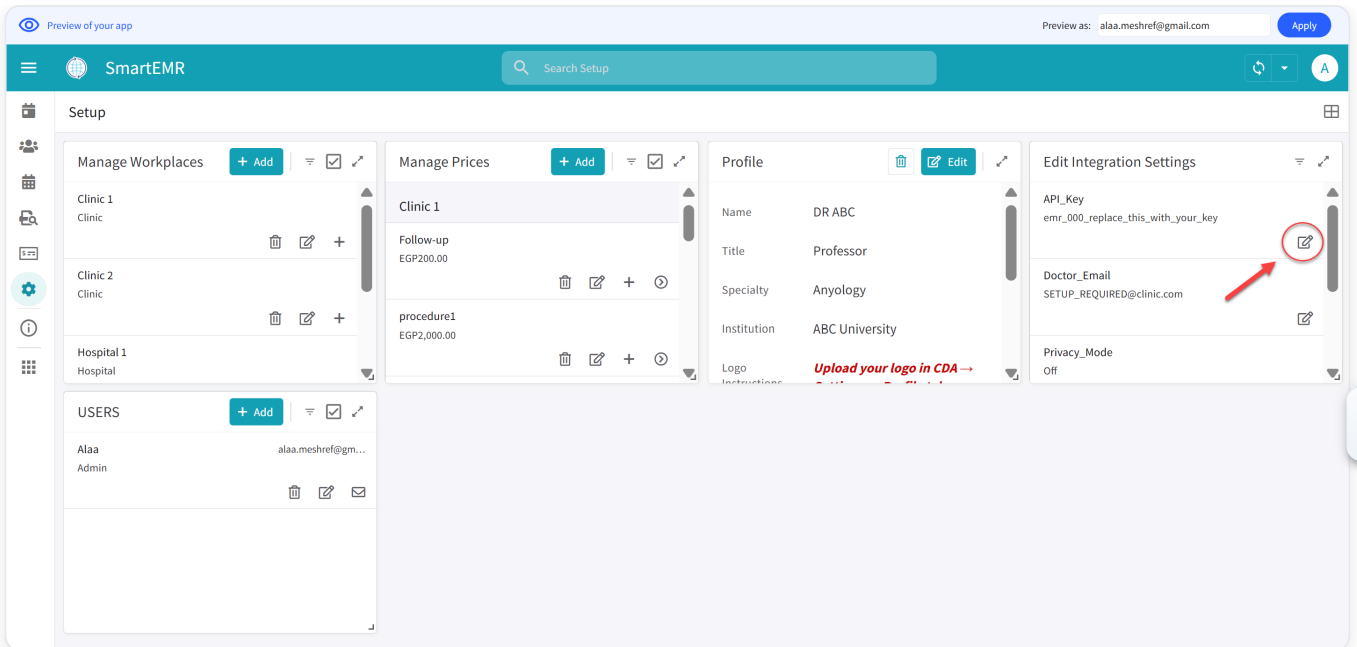
1. On your computer browser, go to clinic.ai4docs.ai and sign in
2. Click the **Settings** icon (gear)
3. In the **General** tab, scroll down to find your **EMR API Key**. It looks like: `emr_a1b2c3-d4e5f6-7890a-bcdef1`
4. Click the **Copy** button next to the key to copy it to your clipboard



CDA Settings — copy your EMR API Key by clicking the Copy button

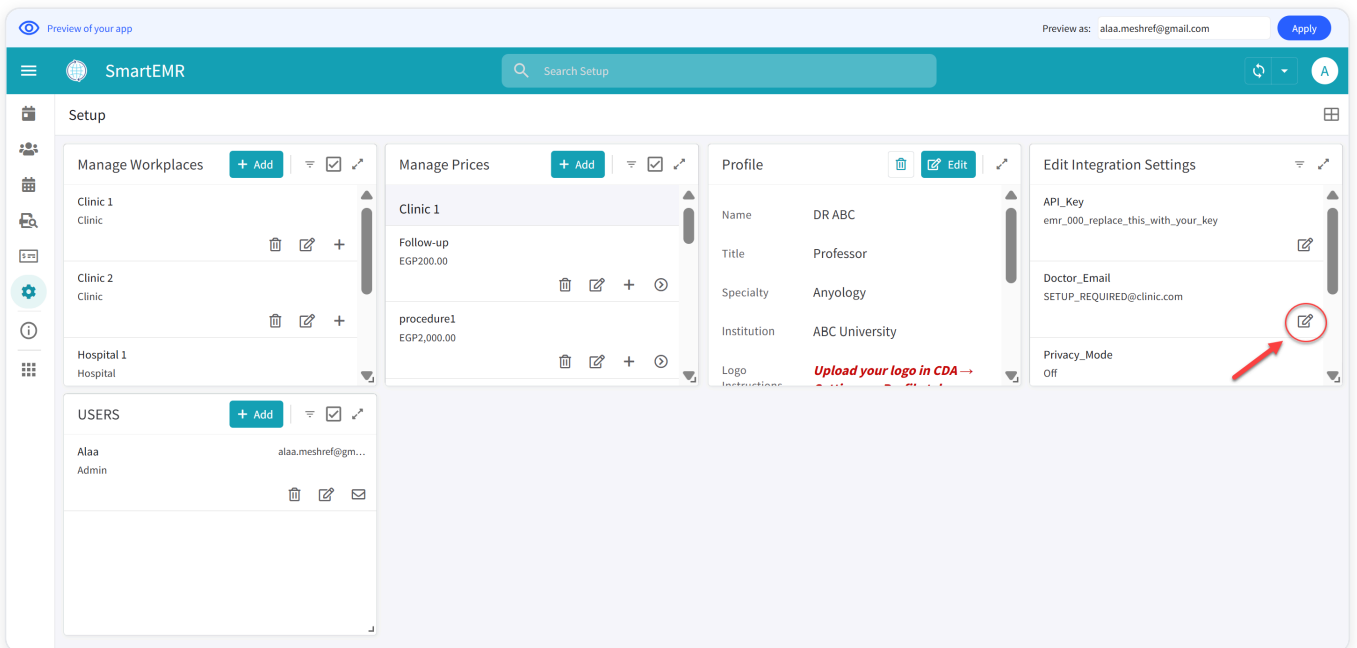
Part B: Enter API Key, Email, and Sheet ID in Smart EMR

5. Go back to Smart EMR > hamburger menu > **Setup** > **SETTINGS** tab
6. Tap the **Edit** button (pencil icon)
7. In the **API_Key** field: paste the API key you copied. **Replace the entire placeholder text** `emr_000_replace_this_with_your_key` with your real key



Replace the placeholder API key with your real key from CDA

8. In the **Doctor_Email** field: type the **exact same email address** you use to sign into the CDA app at clinic.ai4docs.ai. **This must match exactly.** Replace the placeholder text `SETUP_REQUIRED@clinic.com`



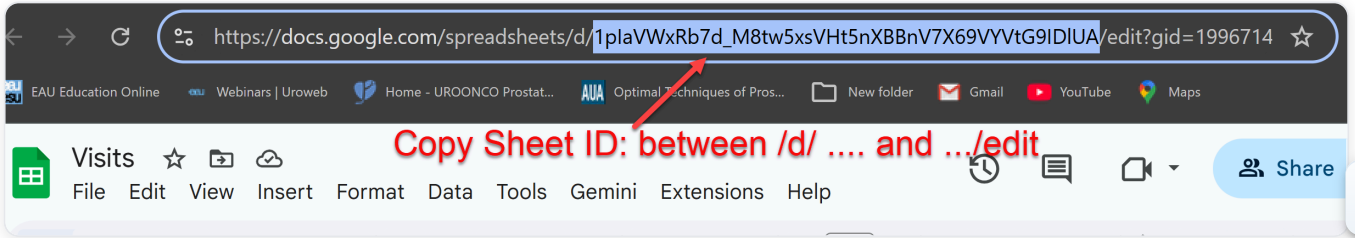
Replace the placeholder email with your real CDA email address

9. In the **Sheet_ID** field: enter your Google Sheet ID. **This is critical — without the Sheet ID, printing and AI note fetching will not work.**

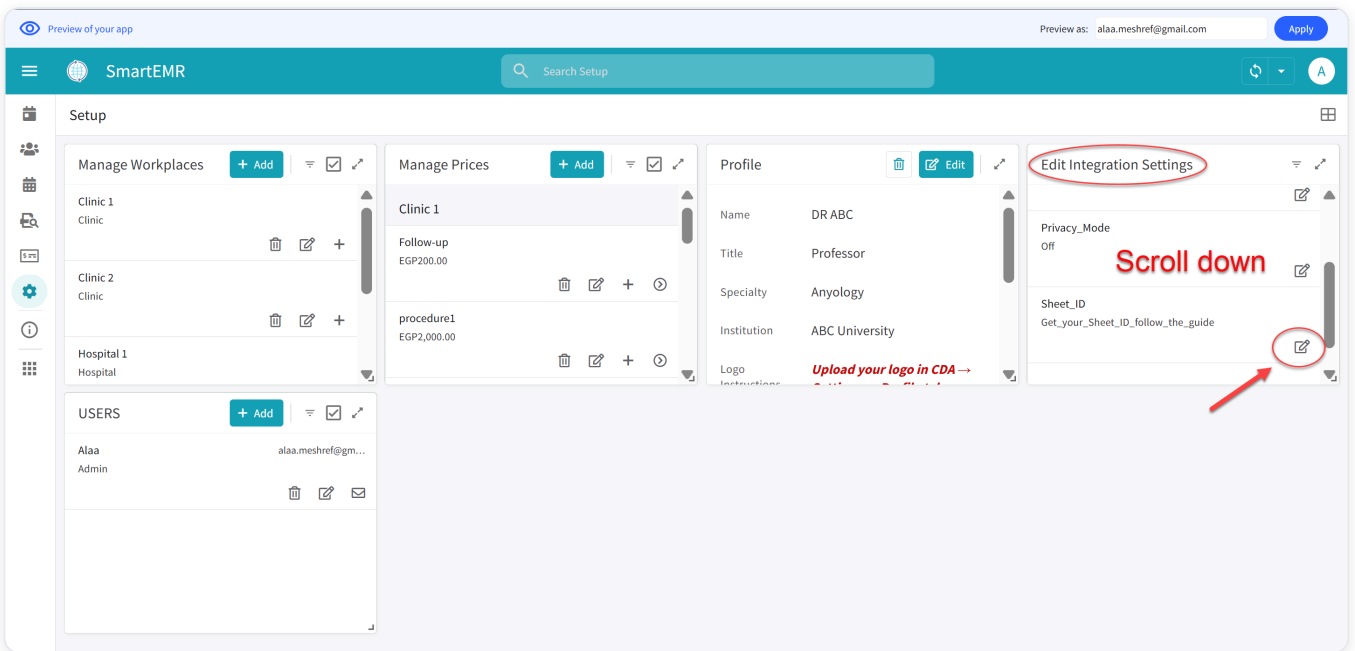
How to find your Sheet ID: Open your **Visits** spreadsheet in Google Drive (see Part C below). Look at the URL in your browser address bar. The Sheet ID is the long string of letters and numbers between `/d/` and `/edit`. For example:

<https://docs.google.com/spreadsheets/d/1aBcDeFgHiJkLmNoPqRsTuVwXyZ/edit>

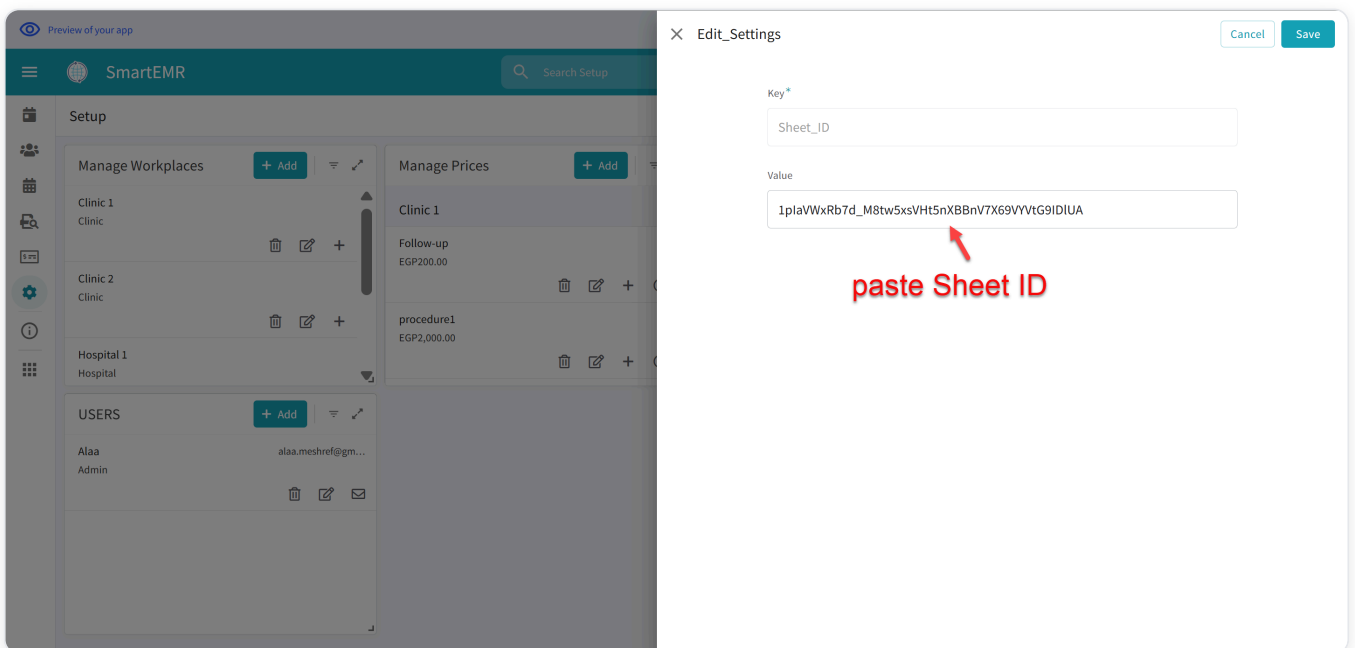
The bold part is your Sheet ID. Copy it and paste it into the Sheet_ID field.



Find and copy the Sheet ID from your Google Sheets URL bar



Edit the Sheet_ID field in Smart EMR Settings



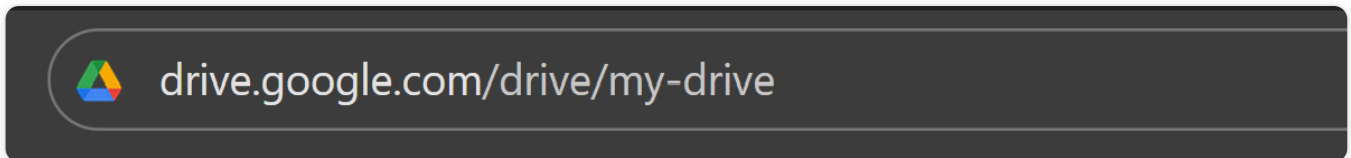
Paste your Sheet ID into the Sheet_ID field and save

10. Tap **Save**

All three fields are required: API_Key, Doctor_Email, and Sheet_ID. If any of these are missing or incorrect, the AI integration and printing will not work. Double-check each one before saving.

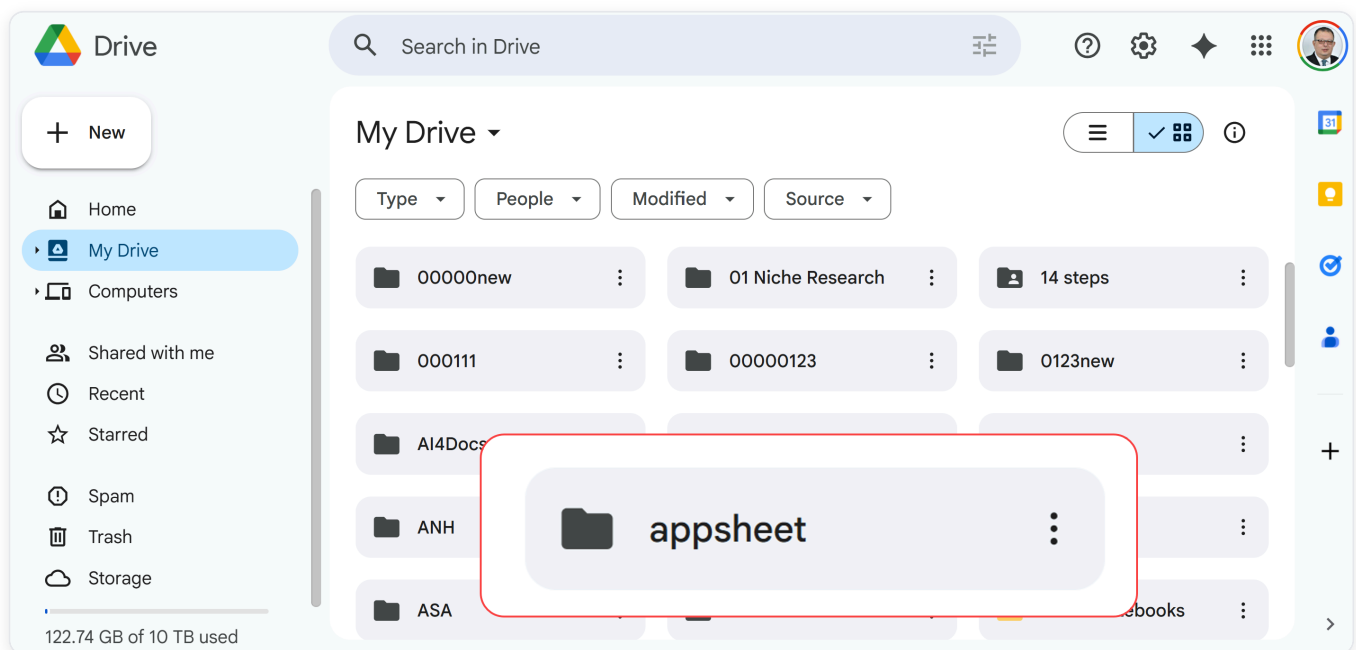
Part C: Find Your Visits Spreadsheet in Google Drive

1. Open **Google Drive** in your browser: go to drive.google.com



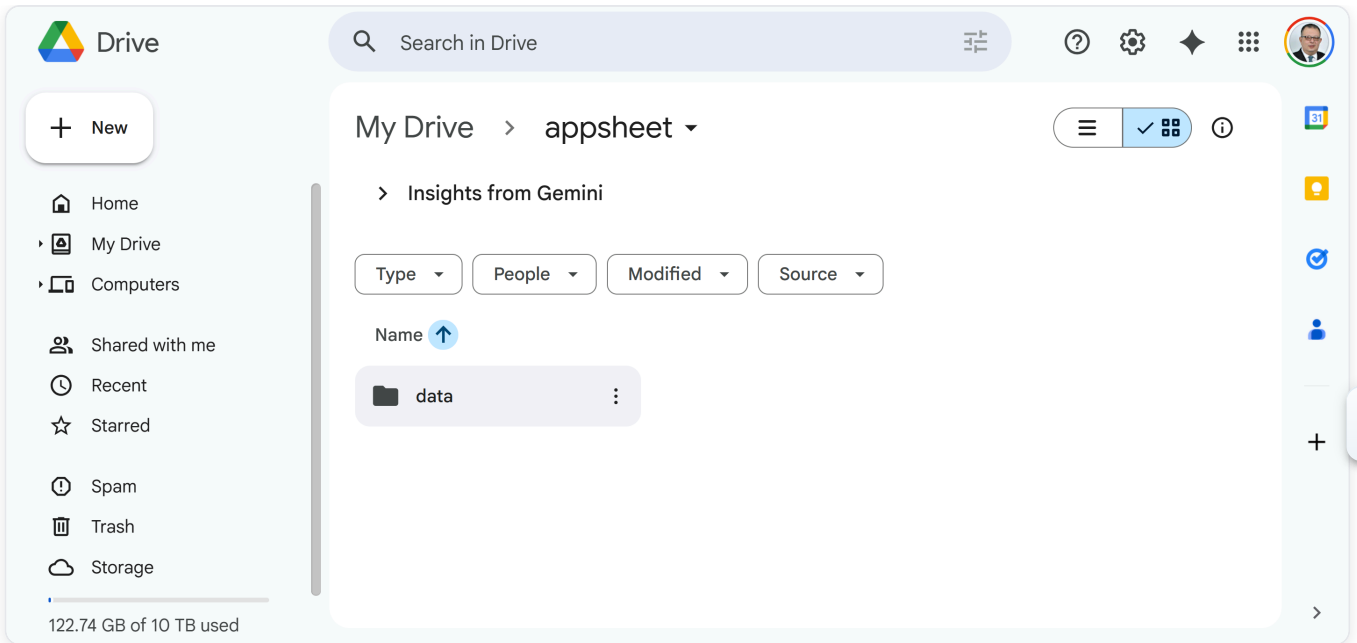
Open Google Drive in your browser

2. Navigate to the **appsheet** folder in your Drive



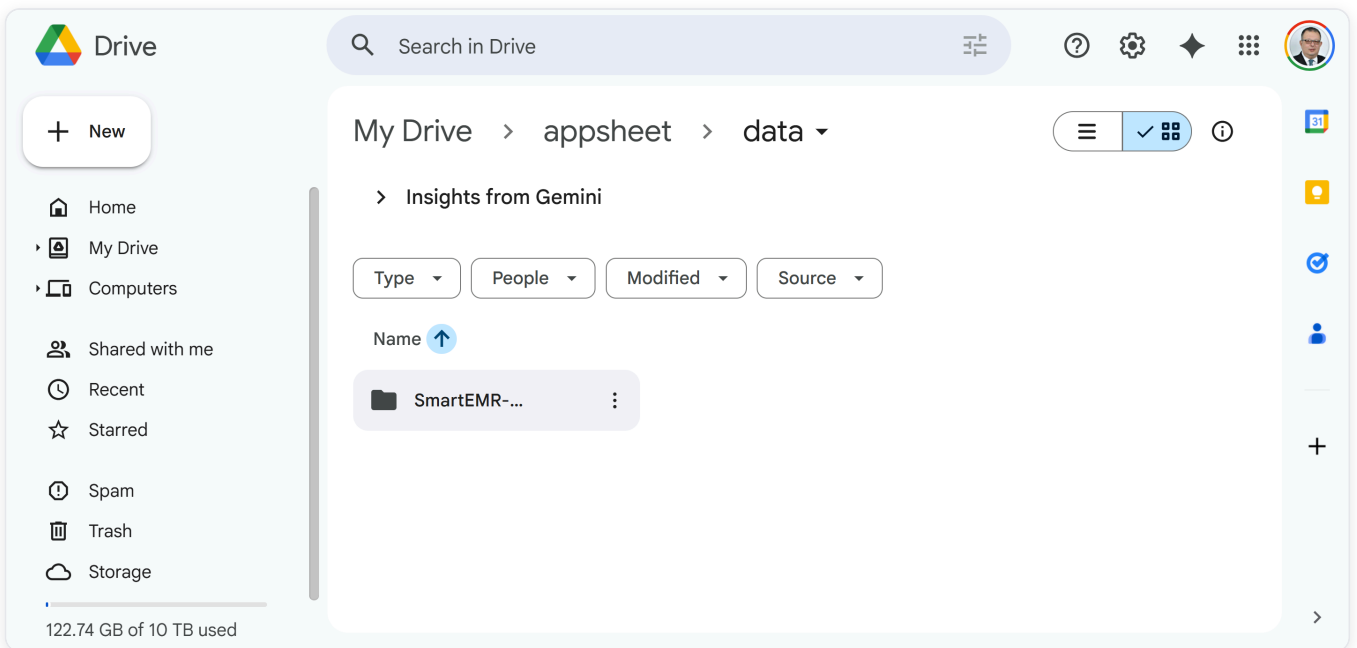
Find and open the "appsheet" folder in your Google Drive

3. Open the **data** subfolder



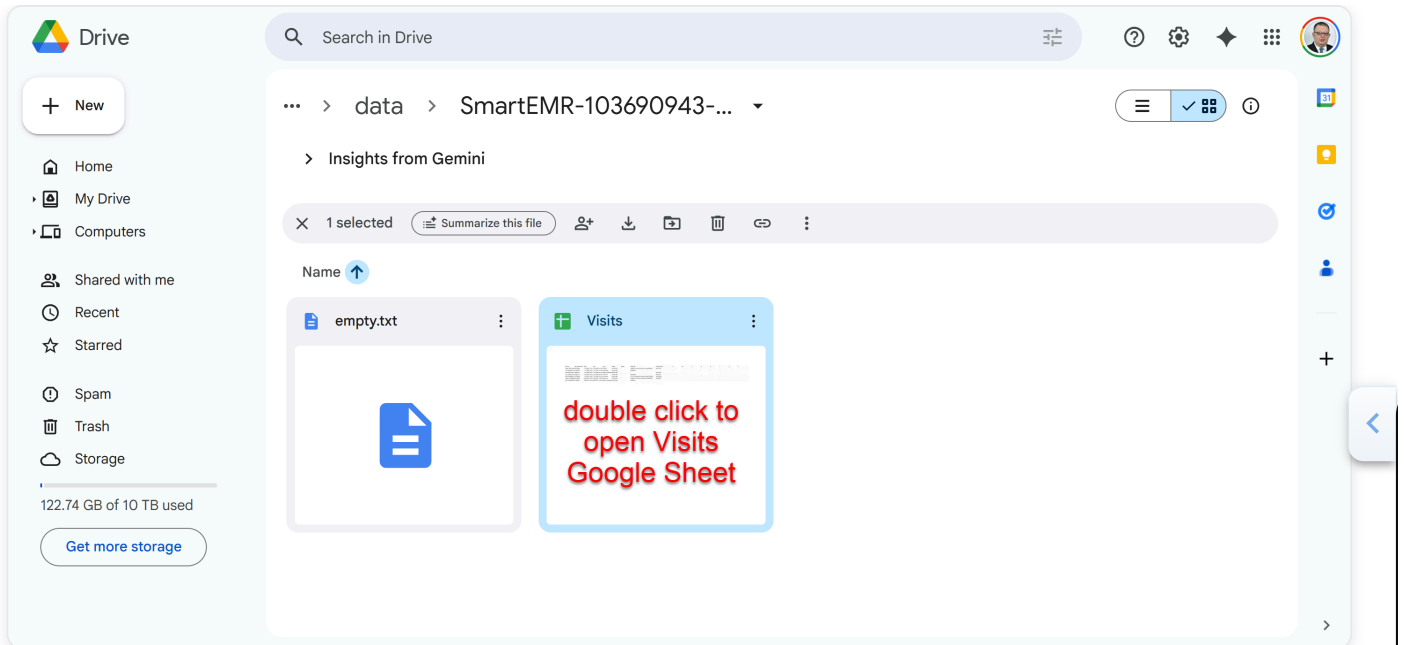
Open the "data" subfolder

- Find and open the **SmartEMR-XXXXX** folder (the folder name starts with "SmartEMR" followed by numbers)



Find your SmartEMR folder (the name includes numbers unique to your app)

- Inside that folder, you will see the **Visits** Google Sheet (green spreadsheet icon). **Double-click** on it to open it



Open the "Visits" Google Sheet — this is where all your data lives

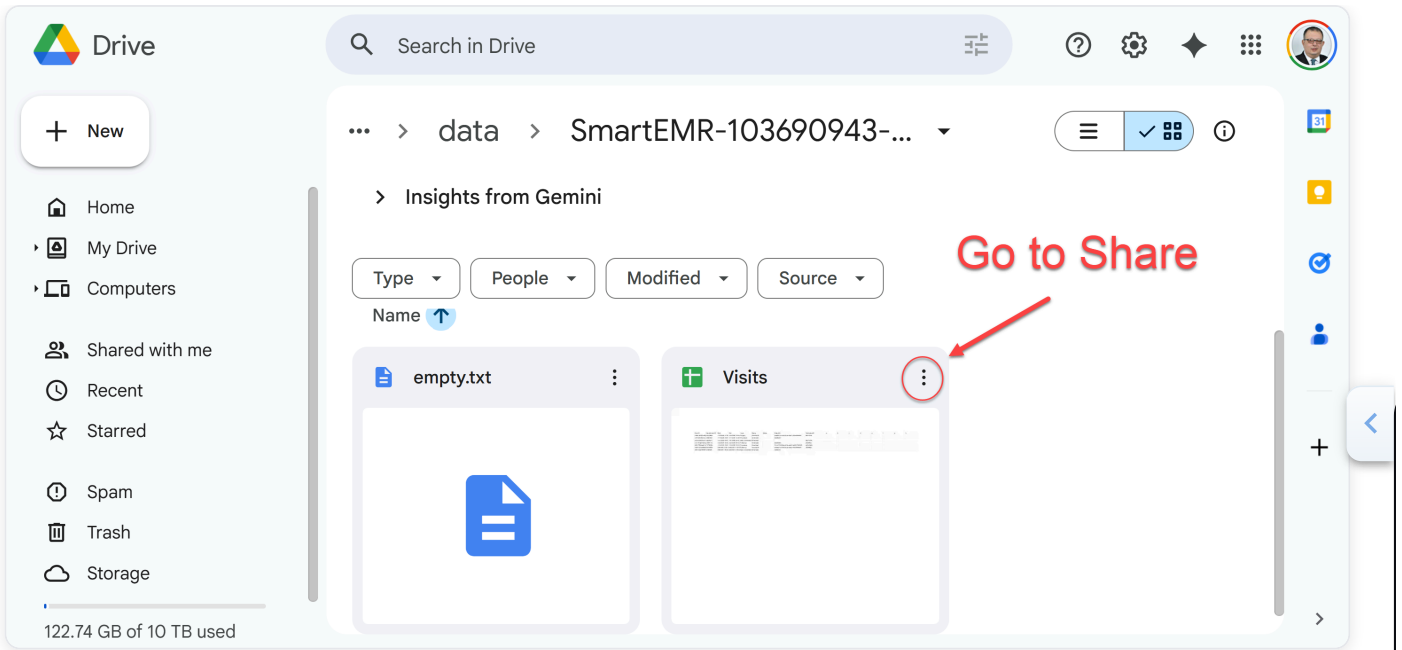
While you have the Visits spreadsheet open: This is also where you copy the Sheet ID from the URL bar (for Part B above). Look at the URL and copy the long string between `/d/` and `/edit`.

Part D: Share the Spreadsheet with the Backend Service

Smart EMR uses a backend service to handle printing and AI note fetching. For this to work, you need to share your Visits spreadsheet with our service account. **This is a one-time step.**

Without this step, printing and note fetching will NOT work. The backend needs permission to read your patient data (for printing) and write clinical notes (when you fetch from CDA). Your data stays in your Google account — the service account only accesses what it needs.

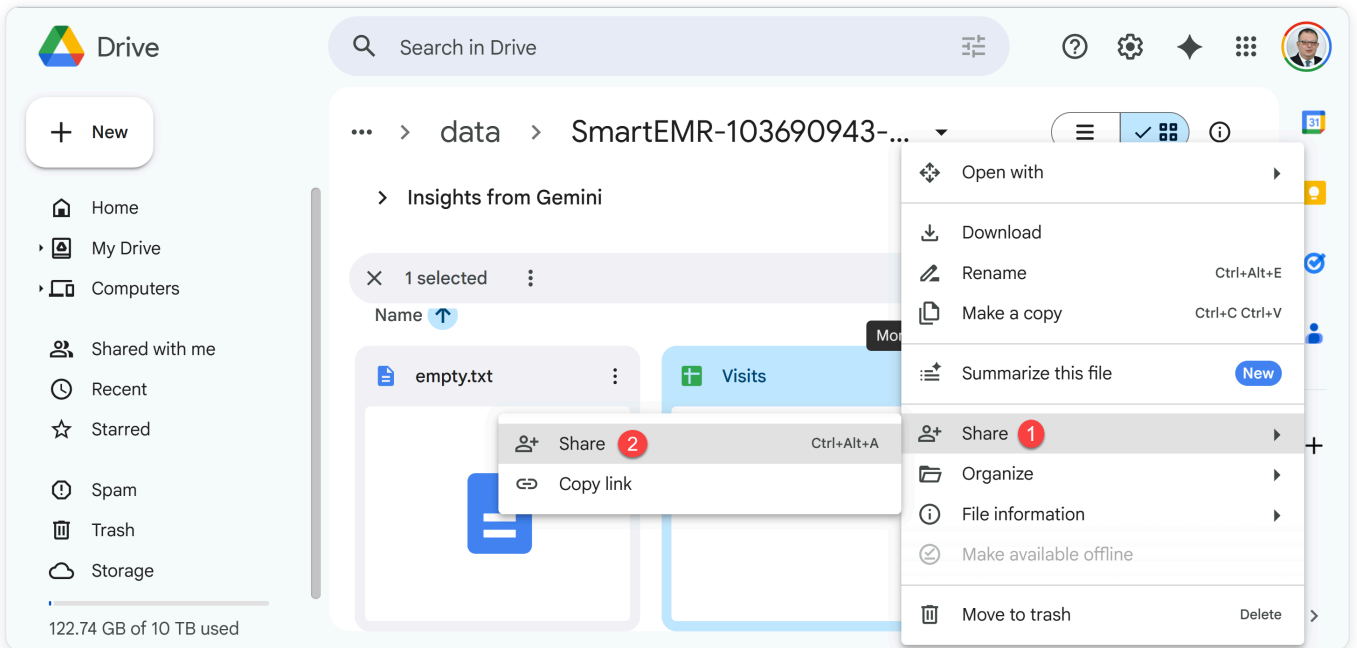
6. With the Visits spreadsheet open, click the **Share** button at the top right corner (green button)



Click the "Share" button at the top right of the Visits spreadsheet

7. In the "Add people and groups" field, paste the following email address **exactly**:

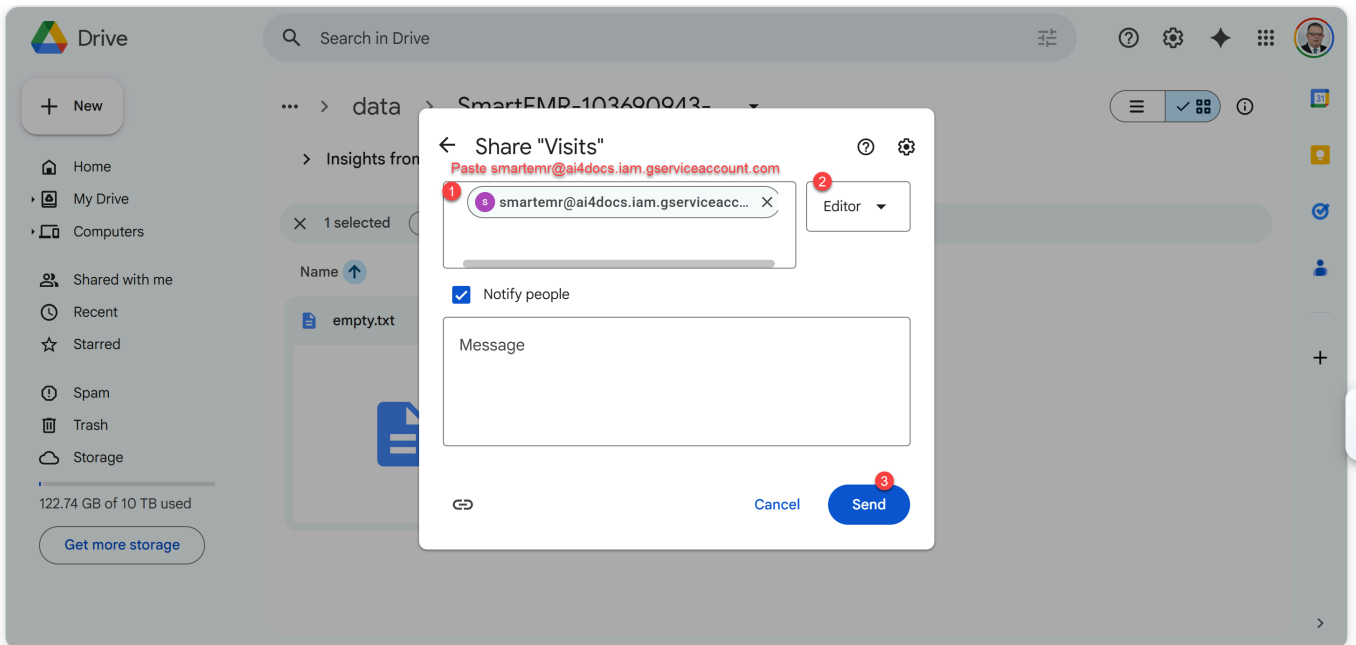
smartemr@ai4docs.iam.gserviceaccount.com



Paste the service account email address into the sharing field

8. Make sure the permission is set to **Editor** (this allows the backend to read data for printing and write notes when you fetch from CDA)

9. Click **Send** (you can uncheck "Notify people" since this is a service account, not a real person)



Set permission to "Editor" and click Send to complete sharing

You're Done!

Your Smart EMR is ready to use! You have successfully cloned the app, set up your admin account, connected the AI integration, and shared your spreadsheet with the backend service. You can now start adding patients, booking appointments, and generating AI clinical notes.

What's Next?

There are a few more things you can set up to get the most out of Smart EMR — like your doctor profile, clinic logo, workplace locations, service prices, and staff accounts. These are all covered in the complete documentation:

Complete Documentation

Set up your doctor profile, clinic locations, service prices, staff members, and learn the daily workflow.

Frequently Asked Questions

Common questions about Smart EMR, troubleshooting, and tips for getting the most out of the system.

Need help? Join our [WhatsApp Support Group](#) to get help from the team and connect with other Smart EMR users.