

Mail Sets

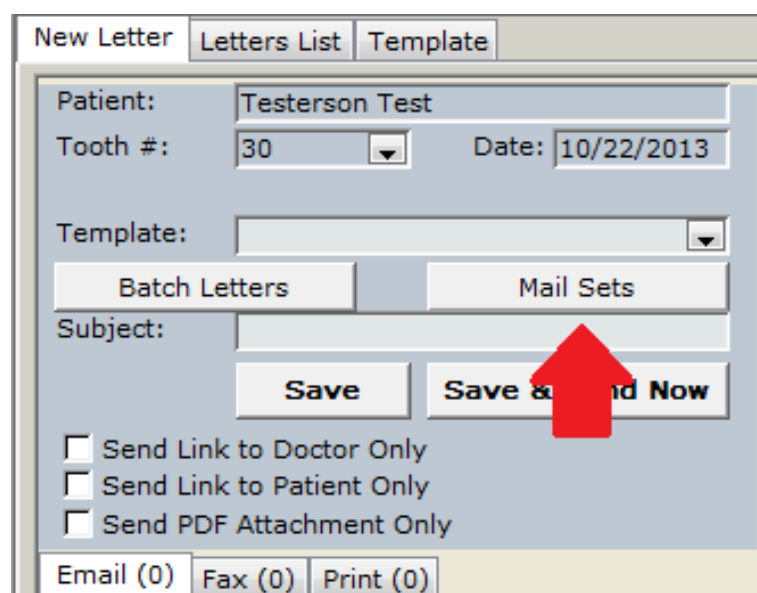
266 [TDO KB](#) November 25, 2025 [New User resources](#) 6.10K

Overview

Mail sets allow you to send a series of letters to one patient and/or referring doctor. This can come in handy if you normally mail a new patient packet to new patient referrals or a thank you letter to the referring doctor. Mail sets allow you to send this group of letters to your desired recipients without having to open each one individually.

Detailed Instructions

First, you must configure your mail sets. In a patient's Letters module, click the **Mail Sets** button.



The screenshot shows a software interface for creating a new letter. At the top are three tabs: 'New Letter' (selected), 'Letters List', and 'Template'. Below the tabs are input fields for 'Patient:' (Testerson Test), 'Tooth #:' (30), and 'Date:' (10/22/2013). There is a 'Template:' dropdown menu. Below these are two buttons: 'Batch Letters' and 'Mail Sets'. A red arrow points to the 'Mail Sets' button. Below the buttons is a 'Subject:' input field. At the bottom are 'Save' and 'Save & Send Now' buttons. Below these are three checkboxes: 'Send Link to Doctor Only', 'Send Link to Patient Only', and 'Send PDF Attachment Only'. At the very bottom are three buttons: 'Email (0)', 'Fax (0)', and 'Print (0)'.

The mail set form will open, displaying any existing mail sets at the top. Click the **Options** button to customize.



Select the existing mail set you wish to edit from the top combo box or go to a new record and type in your new Mail Set name.

Configure Mail Sets

Mail Set: **Add Mail Set**

Mail Set Name: Existing PT packet test **Delete**

Letters:

	LetterID
☒	Consent for RCT Therapy
☐	Pre Endo Surgery Instructions
☐	Excused Letter
*	

click either of these buttons to add a mail set

Record: 2 of 4 **No Filter** Search

Once you have the proper set selected, select the first letter you wish to include in your set. After picking your letter, click the to the left of the letter name. This opens up the delivery methods for that letter.

Configure Mail Sets

Mail Set: New Patient Packet **Add Mail Set**

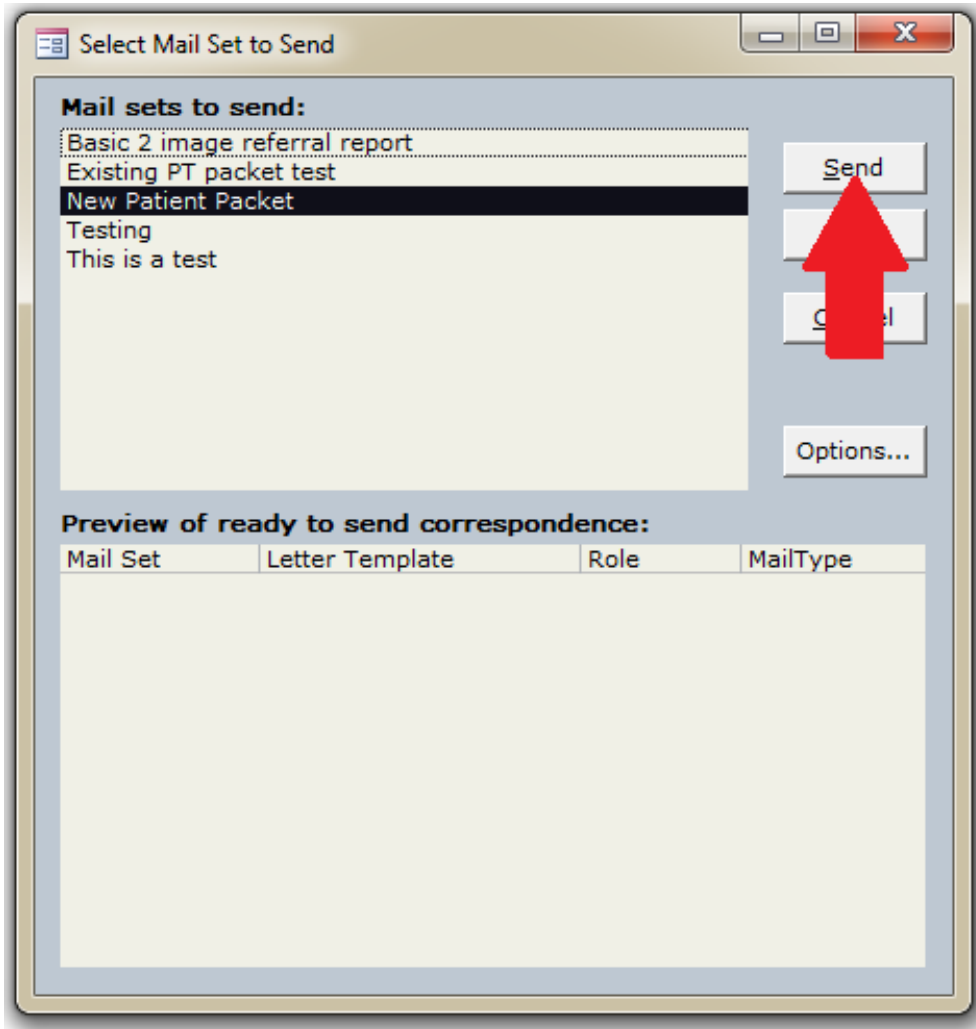
Mail Set Name: New Patient Packet **Delete**

Letters:

	LetterID	Role	MailType	Email_ToTyp
☒	* Web Registration, New Patient			
*				
		Patient		
		Referring		
		General		
		Doctor		
		Other		

Record: 5 of 5 **No Filter** Search

the Daily Reports – Letters to send



Online URL: <https://kb.tdo4endo.com/article.php?id=266>