

Print Referring Doctor Address Labels in TDO

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Overview

If you need to print address labels for your referring doctors, it can be accomplished in several ways, depending on the type of information you are trying to find. The detailed instructions show how to print labels based on whether you are trying to print labels for one doctor at your practice or if you are trying to print labels for all the doctors at your practice.

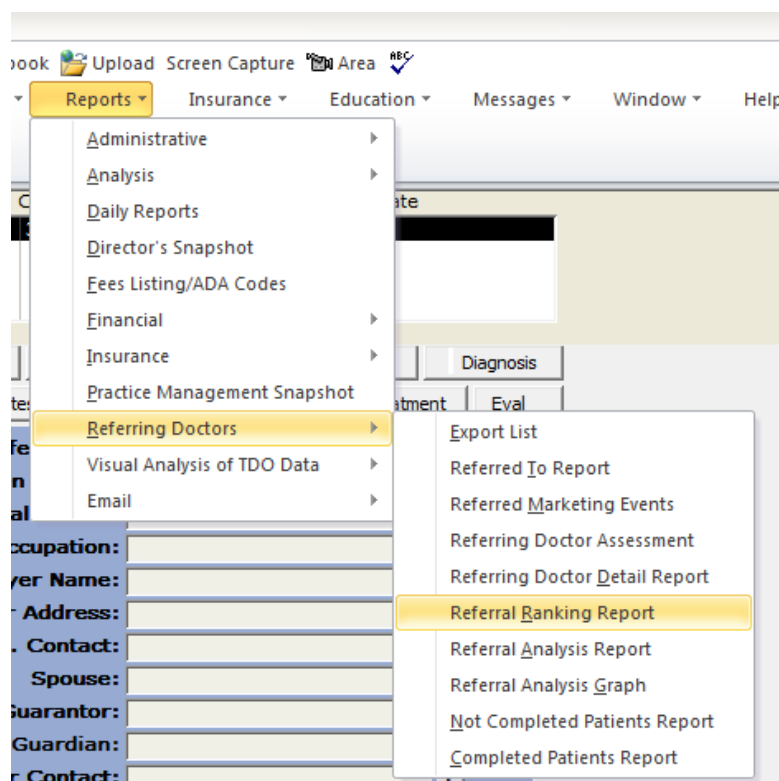
If you would like to print the labels outside of TDO, you can export a list of your referring doctors' information into Excel and then perform a mail merge in Microsoft Word.

Detailed Instructions

These instructions only work if you are on Microsoft Runtime 2010. Runtime 2013 & 2016 do not work and will need to export the list to create labels.

SINGLE DOCTOR PRACTICE

1. Open **Reports > Referring Doctors > Referral Ranking Report**



Report Settings

☒ Doctor ☐ Practice ☐ Group Ref Practices

Name: ▼

Report: ▼

Location: ▼

Rank from: to:

Start Date: ▼ ▼ ▼

End Date: ▼ ▼ ▼

November 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

November 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Date Range

☒ Current Month ☐ Last Month ☐ Previous Month ☐ Last Year's MTD

☐ Current Quarter ☐ Last Quarter ☐ Previous Quarter ☐ Last Year's QTD

☐ Current Year ☐ Last Year ☐ Previous Year ☐ Last Year's YTD

☒ Lifetime ☐ User Specified

OK **Cancel**

2. It will bring up the options that you want to sort the ranking by. Choose the options that best suit you. If you would like the largest list of doctors, select the options seen below.

Report Settings

☐ Doctor ☒ Practice ☐ Group Ref Practices

Name: Carr Endodontics

Report: Total Billed

Location:

Rank from: 1 to: 500

Start Date: End Date:

November 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Date Range:

☐ Current Month ☐ Last Month ☐ Previous Month ☐ Last Year's MTD

☐ Current Quarter ☐ Last Quarter ☐ Previous Quarter ☐ Last Year's QTD

☐ Current Year ☐ Last Year ☐ Previous Year ☐ Last Year's YTD

☒ Lifetime ☐ User Specified

3. It will bring up a ranking list. Notice the two buttons on the top of the report. Click **Label Wizard**.

Collected Rankings

☒ Show Inactive

Label Wizard Address List

Rank

TotalCollec	Name	Rank
26	27	28

Billed Rankings

☒ Show Inactive

Label Wizard Address List

Rank

4. When the **Label Wizard** comes up, select the proper **Avery** number for the labels you will be using. It will be necessary to know the exact number for labels to print out properly. Click **Next**.

Label Wizard

This wizard creates standard Avery labels or custom labels.

What label size would you like?

Avery number:	Dimensions:	Number across:
5095	2 1/2" x 3 3/8"	2
5096	2 3/4" x 2 3/4"	3
5097	1 1/2" x 4"	2
5160	1" x 2 5/8"	3
5161	1" x 4"	2

Unit of Measure: ☒ English ☐ Metric

Label Type: ☒ Sheet feed ☐ Continuous

Customize... ☐ Show custom label sizes

Cancel < Back Next > Finish

Label Wizard

This wizard creates standard Avery labels or custom labels.

What label size would you like?

Avery number:	Dimensions:	Number across:
5260	1" x 2 5/8"	3
5261	1" x 4"	2
5262	1 1/3" x 4"	2
5266	2/3" x 3 7/16"	2
5267	1/2" x 1 3/4"	4

Unit of Measure: ☒ English ☐ Metric

Label Type: ☒ Sheetfeed ☐ Continuous

☐ Show custom label sizes

5. The next page allows you to make stylistic decisions as to the font, color, and size used. Adjust as necessary.

Label Wizard

What font and color would you like your text to be?

Text appearance

Font name: Font size:

Font weight: Text color:

☐ Italic ☐ Underline

Label Wizard

What font and color would you like your text to be?

Text appearance

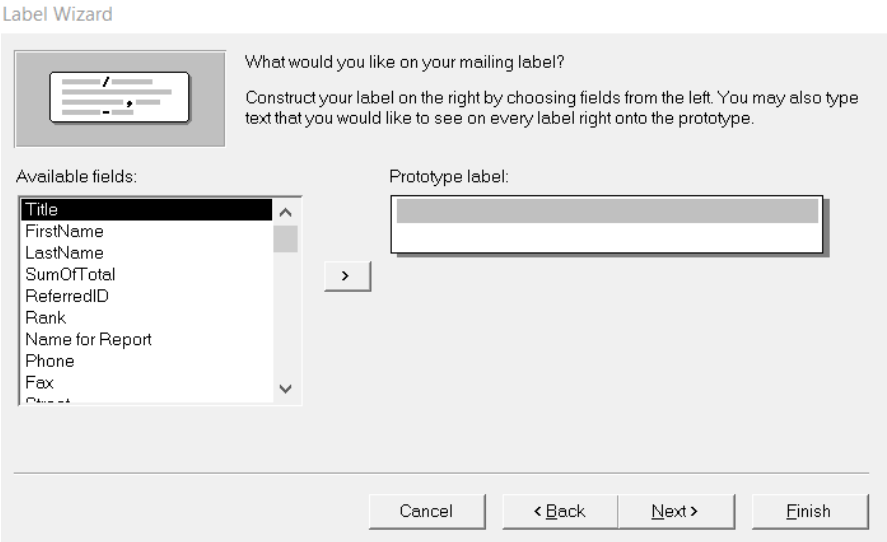
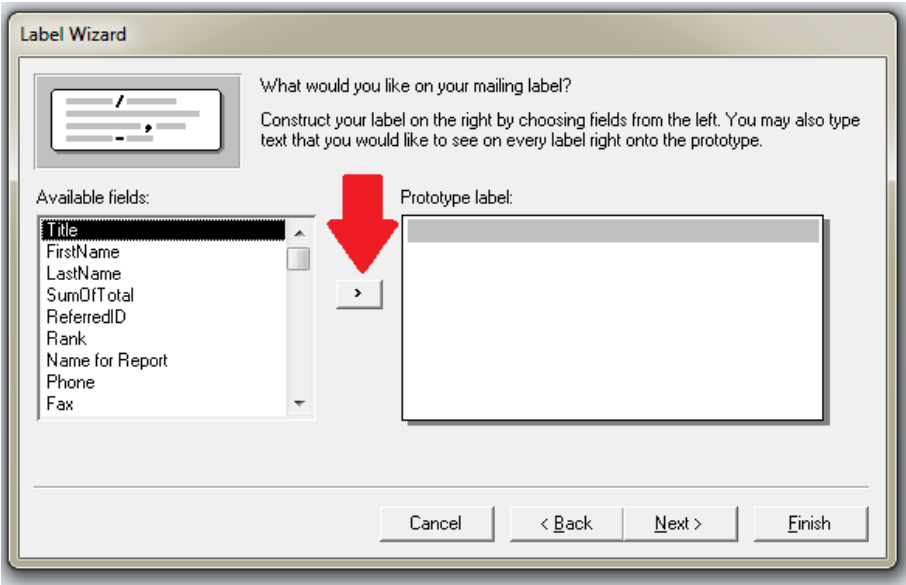
Font name: Font size:

Font weight: Text color:

☐ Italic ☐ Underline

6. It will then ask you what you would like to see on your labels. Much in the same way token are used in the Letters module, you must select and format the labels using the tokens listed in the left hand column

and move the to the **Prototype** label column by highlighting a field and clicking the > button. See below:



7. This shows what a Prototype may look like.

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the left. You may also type text that you would like to see on every label right onto the prototype.

Available fields:

- Title
- FirstName**
- LastName
- SumOfTotal
- ReferredID
- Rank
- Name for Report
- Phone
- Fax

Prototype label:

```
{Title} {FirstName}{LastName}
{Street}
{City}, {State} {Zip}
```

Cancel < Back Next > Finish

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the left. You may also type text that you would like to see on every label right onto the prototype.

Available fields:

- Name for Report
- Phone
- Fax
- Street
- Street2
- City
- State
- Zip
- RefID**

Prototype label:

```
{Title} {LastName}
{Street} {Street2} {City}, {State}, {Zip}
```

Cancel < Back Next > Finish

8. If you want the labels sorted in a particular manner, select from the available fields.

Label Wizard

You can sort your labels by one or more fields in your database. You might want to sort by more than one field (such as last name, then first name), or by just one field (such as postal code).

Which fields would you like to sort by?

Available fields:

Title
FirstName
LastName
SumOfTotal
ReferredID
Rank
Name for Report
Phone

Sort by:

--

Cancel < Back Next > Finish

Label Wizard

You can sort your labels by one or more fields in your database. You might want to sort by more than one field (such as last name, then first name), or by just one field (such as postal code).

Which fields would you like to sort by?

Available fields:

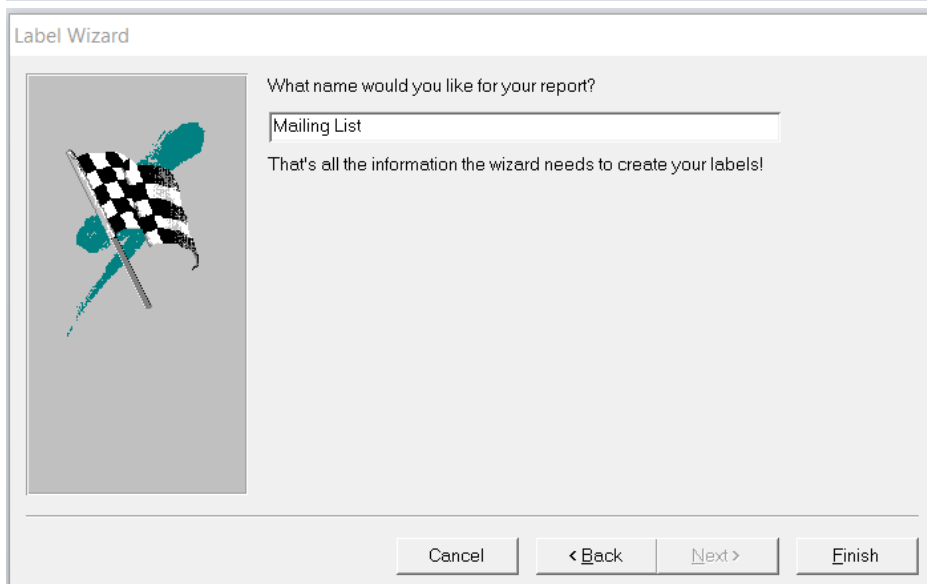
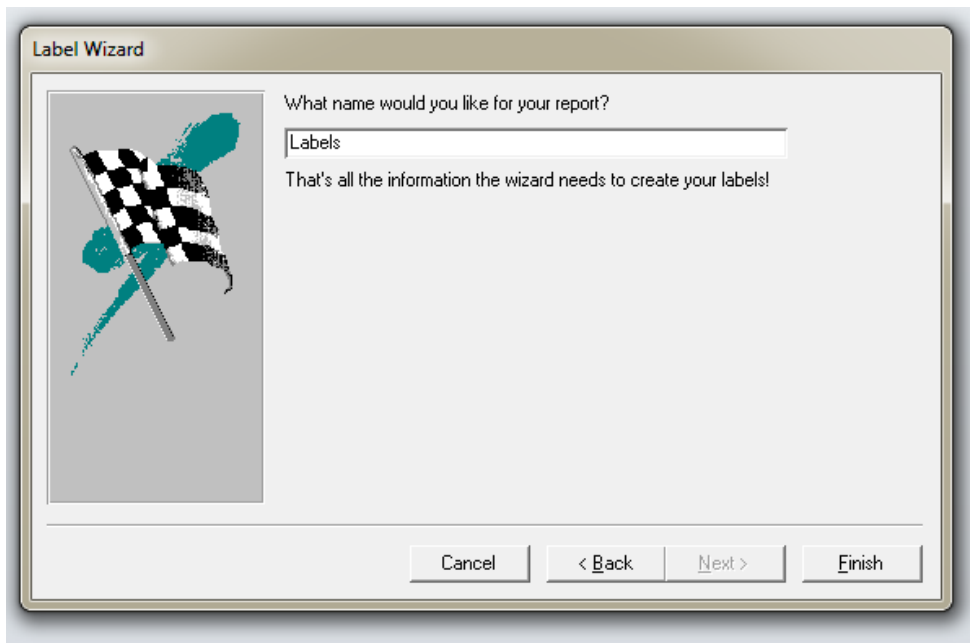
Title
FirstName
SumOfTotal
ReferredID
Rank
Name for Report
Phone
Fax

Sort by:

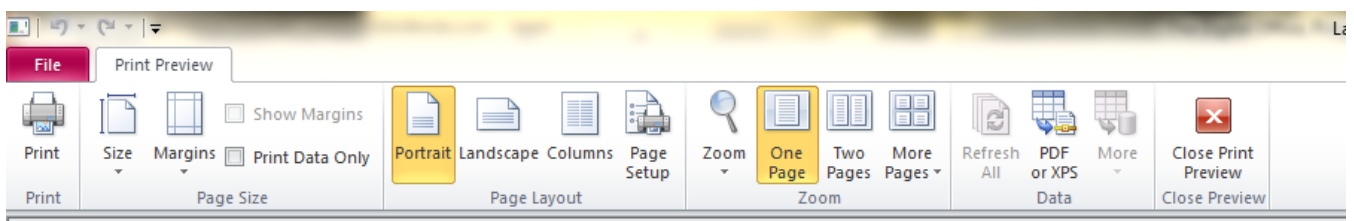
LastName

Cancel < Back Next > Finish

9. Name your Labels if you please and click **Finish**.

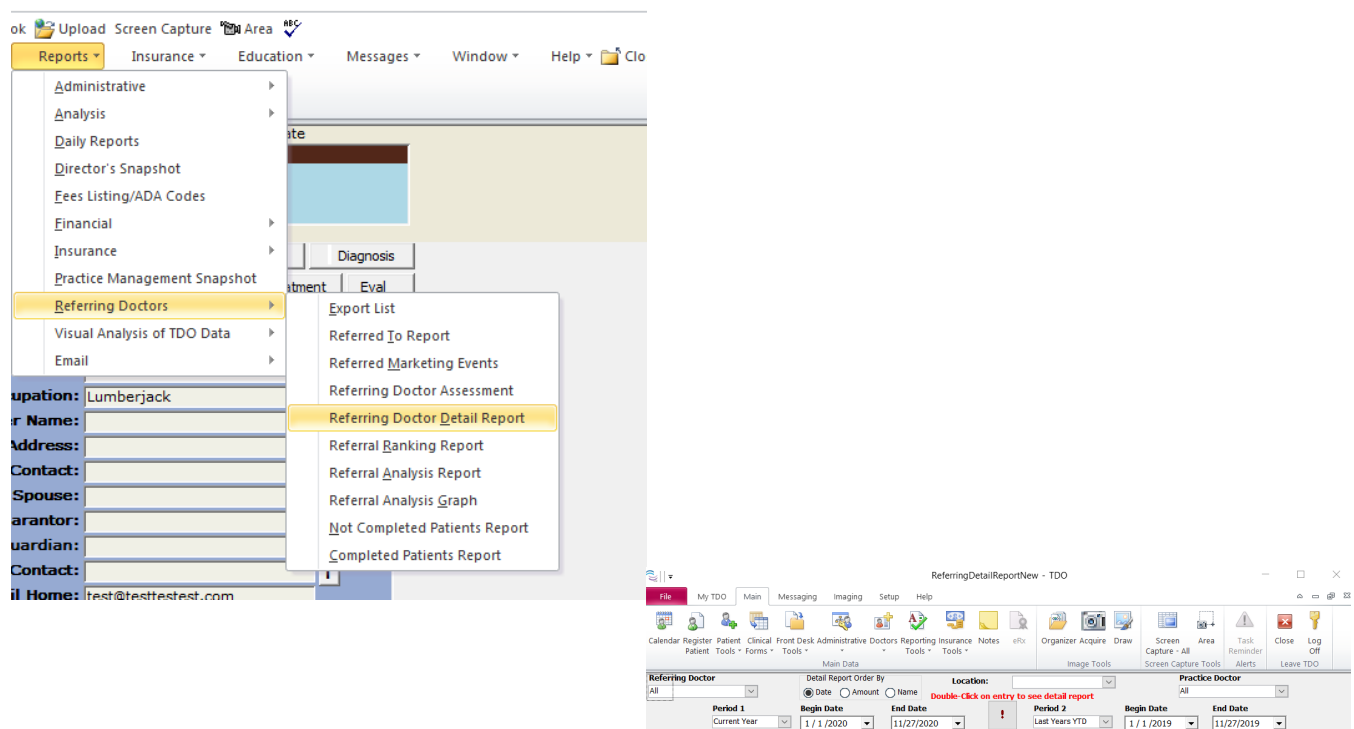


10. This brings up the Print Preview window with your labels populated with information from the Ranking Report. If satisfied, click **Print**.



MULTIPLE DOCTOR PRACTICE

Reports > Referring Doctors > Referring Detail Report



Double click on the box under rank next to total billed, collected or cases for period 1 (current year).

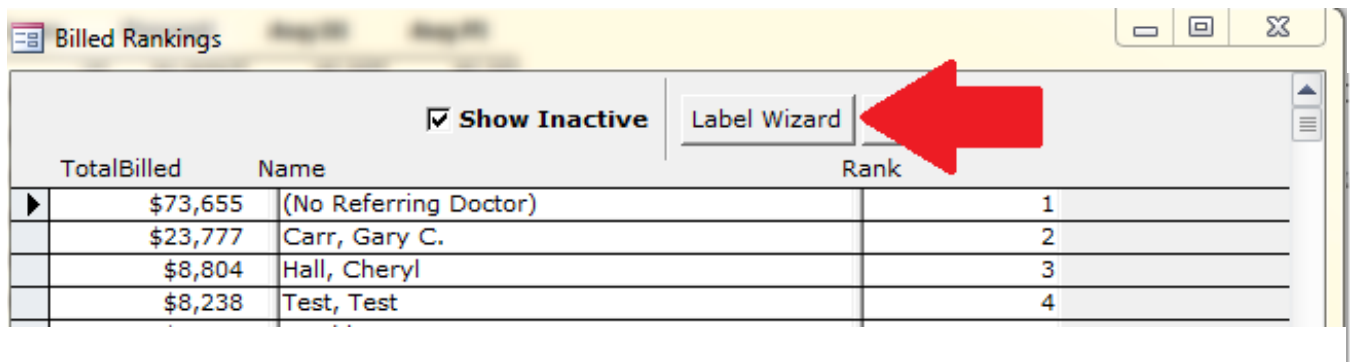
Dbl-Click on Rank to see complete rankings list

	Period 1	Rank	Period 2	Rank	Trend
Total Billed	\$23,777.00	2	\$16,666.00	7	43.2%
Total Collected	\$14,607.00	1	\$4,322.00	6	29.6%
Total Cases	19	1	8	3	42.1%

Dbl-Click on Rank to see complete rankings list

	Period 1	Rank	Period 2	Rank	Trend
Total Billed	\$12,260.00		\$3,900.00		31.8%

Click on Label Wizard



The screenshot shows a window titled "Billed Rankings". In the top right corner, there is a button labeled "Label Wizard" with a red arrow pointing to it. Below the button, there is a table with the following data:

TotalBilled	Name	Rank
\$73,655	(No Referring Doctor)	1
\$23,777	Carr, Gary C.	2
\$8,804	Hall, Cheryl	3
\$8,238	Test, Test	4

At this point, follow the steps related to Label Wizard in the same fashion described for Single Doctor Practice.

You can sort by rank and then just print the first one or two pages of labels.

Online URL: <https://kb.tdo4endo.com/article.php?id=276>