

Creating a Batch Letter in TDO

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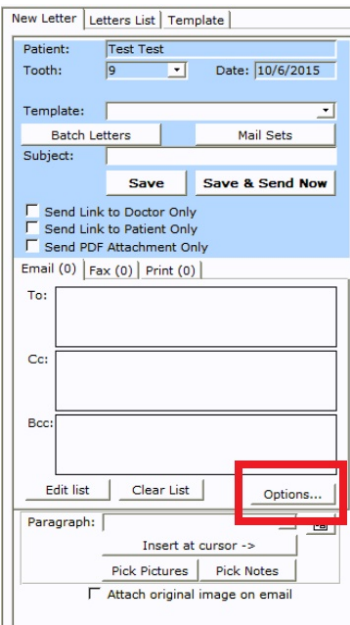
Overview

How to send the same template to more than one recipient

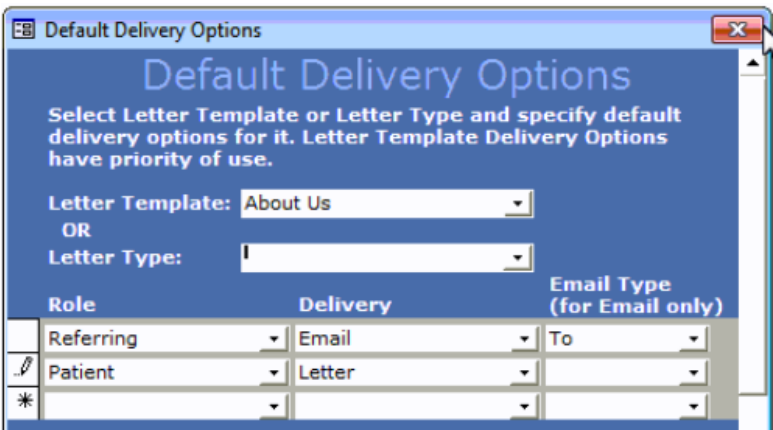
Detailed Instructions

Click on the Letters tab. Then the New Letter tab.

First, select the Delivery method for the template by clicking on Options.



Select the letter template from the **Letter Template** drop-down menu, then select the delivery option. Select the **Role**, then **Delivery**, which can be set to either print/email or both. Close the window.



	Role	Delivery	Email Type (for Email only)
	Referring	Email	To
	Patient	Letter	
*			

On the **New Letter** tab, select the template you would like to create as a batch by using the drop-down

Template box. See below:

The screenshot shows the 'New Letter' window with the 'Template' dropdown menu open. The 'Template' field is highlighted with a red box. The dropdown menu lists various templates, including '5 Figure Lecture', '6 Figure Lecture', '7 Figure Lecture', '8 Figure Lecture', 'Web Meeting Invitation to Referring Dr', 'Web Meeting Thank You to Referring Dr', 'Web Post-op Evaluation Email', 'Web Ref Dr, Welcome to Cyberspace!', 'Web Referral Slip', 'Web Registration, Existing Pt', 'Web Registration, Existing Pt Reminder', 'Web Registration, New Patient', 'Web Registration, New Patient Reminder', 'Orinage Report', 'About Us', 'Carr's Custom Report', 'Case Report', 'Case Report, Large', and 'Case Report, Medium'. The 'Orinage Report' and 'About Us' options are highlighted with a red box.

When the template is selected, the Print/Email boxes will automatically populate according to the delivery option that was chosen. The option below shows the letter will print to the referring Dr.

The screenshot shows the 'Save & Send Now' button and the 'Print (1)' box. The 'Print (1)' box is highlighted with a red box. Below it, the text 'Dr Test <6235 Lusk Blvd, , San Diego, CA, 92121> (Referring)' is displayed.

Then, select the **Batch Letters** button, which will open the **Generate Batch Letter** window.

The screenshot shows the 'Generate Batch Letter' window. It has a 'List Type' section with three radio buttons: 'Patient Reports' (selected), 'Case Reports', and 'Referral Ranking'. Below this is a 'Generate' button and a 'Report:' dropdown menu.

Select the **Referral Ranking** option. If you print the batch letter to ALL your Referring Doctors, adjust the **Begin Date** and **End Date** accordingly, and leave the **From Rank** and the **To Rank** blank. See below:

Generate Batch Letter

List Type

☐ Patient Reports

☐ Case Reports

☒ Referral Ranking

Begin Date 4 / 30 / 2012

End Date 4 / 30 / 2012

Category Billings

Doctor All

From Rank

To Rank

☒ Order by Rank

☐ Alphabetically

Generate

Click on the **Generate** button. You will see the progress bar displayed; this means TDO is generating the letter template selected at the beginning for each Referring Doctor entered in TDO.

As soon as the Batch is complete, please click on the **OK** button.

Then click **Reports>Daily Reports** in TDO (**Reporting Tools>Daily Reports** in TDO12), making sure the Practice doctor is selected at the top of the window, and finally select the **Letters to Send** button.

Once the **Letters to Send** window is displayed, you will see all the letters generated as a batch and the envelopes. You will see the word **Batch** at the beginning of the Description.

Select all the letters generated as a Batch

Finally, click on the **Send** button. TDO will start printing the letters along with the envelope using the printer specified above.

Online URL: <https://kb.tdo4endo.com/article.php?id=29>