

Adjusting how reports open in TDO

341 [TDO KB](#) October 13, 2025 [New User resources](#), [Site Configuration](#) 8.69K

Overview

All of the built-in TDO reports can be replaced with customized templates created in the Letters module. This may be helpful in instances like preferring to e-mail patients a report rather than just printing it out. By following these steps and then adjusting the delivery settings for a template, you can very easily do something like having patient statements be sent by email rather than having to mail them all out.

For your customized templates to be used automatically, you must configure which templates to use for each type of report.

By clicking the **Reports** button you can specify to use the TDO report or your own letter. Set for all reports you wish to change.

Detailed Instructions

The first and most important step is to create a template in the Letters module that will substitute the built in report. As an example, attached to this article is a Word document that you can use for Patient statements. There are several other templates that you can download at <https://www.tdo4endo.com/TechnicalSupport/SupportMaterials.aspx>

Once the letter template is created and customized in Letters, go to **Setup>Site Configuration>Edit Control Table>Application Settings**.

Click on the **Reports** button under **Letter Module Properties**

Practice Information	Application Settings
Video Files Location	
Video Path: U:\TDOVideo	
Tooth entries in the appointment history	
☒ Show Tooth Entries	
Action on mark appointment	
as Cancelled / No Show / Rescheduled:	
Move appointments to column: Dr. James	
Letter Module Properties	
Letters Editor: MS Word	Reports...
Letters Format: MS Word Document	☒ Send PDF
SOAP NoteTmpt: SOAP Note Letter	
☐ Attach original image on email	
Email Report to Authorized Doctors Setup	
Email Report to Authorized Patients Setup	

The **Reports-Letters Map** window will display a list of all the TDO reports that can be replaced with customized templates.

Reports-Letters Map

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Report	Letter
☒ 2-Postop Referral Medium	☐
☒ 2-Postop Referral Small	☐
☒ 6 Image Report	☐
☒ Consult Referral Medium	☐
☒ Consult Referral Small	☐
☒ Interim Report Medium	☐
☒ Interim Report Small	☐
☒ Large Diagnostic	☐
☒ Patient's Statement	☐
☒ Postop Referral Medium	☐
☒ Postop Referral Small	☐
☒ Preop and Postop Referral Medium	☐
☒ Preop and Postop Referral Small	☐
☒ Prescription Card	☐
☒ Recall Card Back	☐
☒ Recall Card Front	☐
☒ Recall Report	☐

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17 of 20
No Filter
Search

The **Report** column will list all the built-in reports.

Each built-in report option will have a field on the right side with a 'dropdown' button "**Letter**" column to choose the template you want TDO to replace with.

Once you click the 'dropdown' button, TDO will list all the letter templates available.

Reports-Letters Map

Report	Letter
☒ 2-Postop Referral Medium	☐ [Dropdown]
☒ 2-Postop Referral Small	☐ [Dropdown]
☒ 6 Image Report	☐ [Dropdown]
☒ Consult Referral Medium	☐ [Dropdown]
☒ Consult Referral Small	☐ [Dropdown]
☒ Interim Report Medium	☐ [Dropdown]
☒ Interim Report Small	☐ [Dropdown]
☒ Large Diagnostic	☐ [Dropdown]
☒ Patient's Statement	☐ [Dropdown]
☒ Postop Referral Medium	☐ [Dropdown]
☒ Postop Referral Small	☐ [Dropdown]
☒ Preop and Postop Referral Medium	☐ [Dropdown]
☒ Preop and Postop Referral Small	☐ [Dropdown]
☒ Prescription Card	☐ [Dropdown]
☒ Recall Card Back	☐ [Dropdown]
☒ Recall Card Front	☐ [Dropdown]
☒ Recall Report	☐ [Dropdown]

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--Nothing--

5 Figure Lecture

6 Figure Lecture

7 Figure Lecture

8 Figure Lecture

* Web Meeting Invitation to Referr

* Web Meeting Thank You to Refer

* Web Post-op Evaluation Email

* Web Ref Dr, Welcome to Cybers

* Web Referral Slip

* Web Registration, Existing Pt

* Web Registration, Existing Pt Rei

* Web Registration, New Patient

* Web Registration, New Patient R

6-Image Report

About Us

Once you have found the letter template from the 'dropdown' list, select it.

Reports-Letters Map

Report	Letter
☒ 2-Postop Referral Medium	☐
☒ 2-Postop Referral Small	☐
☒ 6 Image Report	☐
☒ Consult Referral Medium	☐
☒ Consult Referral Small	☐
☒ Interim Report Medium	☐
☒ Interim Report Small	☐
☒ Large Diagnostic	☐
☒ Patient's Statement	☒ Statement of Account
☒ Postop Referral Medium	☐
☒ Postop Referral Small	☐
☒ Preop and Postop Referral Medium	☐
☒ Preop and Postop Referral Small	☐
☒ Prescription Card	☐
☒ Recall Card Back	☐
☒ Recall Card Front	☐
☒ Recall Report	☐

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Then check the “round” box on the left side of the ‘Letter’ field to select it.

Reports-Letters Map

Report	Letter
☒ 2-Postop Referral Medium	☐
☒ 2-Postop Referral Small	☐
☒ 6 Image Report	☐
☒ Consult Referral Medium	☐
☒ Consult Referral Small	☐
☒ Interim Report Medium	☐
☒ Interim Report Small	☐
☒ Large Diagnostic	☐
☒ Patient's Statement	☒ Statement of Account
☒ Postop Referral Medium	☐
☒ Postop Referral Small	☐
☒ Preop and Postop Referral Medium	☐
☒ Preop and Postop Referral Small	☐
☒ Prescription Card	☐
☒ Recall Card Back	☐
☒ Recall Card Front	☐
☒ Recall Report	☐

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Reports-Letters Map

Report	Letter
☒ 2-Postop Referral Medium	☐
☒ 2-Postop Referral Small	☐
☒ 6 Image Report	☐
☒ Consult Referral Medium	☐
☒ Consult Referral Small	☐
☒ Interim Report Medium	☐
☒ Interim Report Small	☐
☒ Large Diagnostic	☐
☒ Patient's Statement	☐
☒ Postop Referral Medium	☐
☒ Postop Referral Small	☐
☒ Preop and Postop Referral Medium	☐
☒ Preop and Postop Referral Small	☐
☒ Prescription Card	☐
☒ Recall Card Back	☐
☒ Recall Card Front	☒ Recall Letter #1
☒ Recall Report	☐

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Report	Letter
2-Postop Referral Medium	Post-Op Report, MediumOld
2-Postop Referral Small	Post-Op Report, SmallOld
6 Image Report	Fransen
Consult Referral Medium	test
Consult Referral Small	Consult Report, Small
Interim Report Medium	Basic Interim Report 2 pic with prn
Interim Report Small	
Large Diagnostic	
Patient's Statement	Statement
Postop Referral Medium	Basic 3 Image Referral Report
Postop Referral Small	Basic 2 pic Interim Report
Preop and Postop Referral Medium	Pre Post TESTTEST
Preop and Postop Referral Small	Pre Post TESTTEST
Prescription Card	Prescription Card
Recall Card Back	Recall Letter #2Old
Recall Card Front	Recall 1
Recall Report	Basic new recall 1

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Your customized Letter template will open now in the Letters module instead of the built-in report. See the example below to see the pop-up report in comparison with the Letters module.

Built-In Report

Excellent Endo
Quality Centered Endodontics

Sweet Tooth
123 Endo St
San Diego, CA 92103
Telephone: (858) 558-3636

Fax: (858) 558-3633

Statement Date: Sunday, April 19, 2015
Account No: 1937562181

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Statement of Account

Testing Guarantor
6293 Lusk Blvd
San Diego, CA 92121
Patient: Fr. Test Test

Date	Tooth#	Description	Claim #	Charges	Credit
7/11/2014	10	D2940 Sedative Fill	Claim # 4532	\$275.00	
8/28/2014		10.00% Interest on \$275.00		\$27.50	
		Adjustment	Late Fee/Int. Charges		
9/16/2014	10	D0362 Two Dimensional Reconstruction C			
10/9/2014		2.00% Interest on \$275.00		\$5.50	
		Adjustment	Late Fee/Int. Charges		
1/19/2015	10	D3320 Bicuspid	Claim # 4575	\$1,092.00	
1/19/2015					200.00
		Adjustment	Charity Case	Laurie	
2/24/2015		Statement Sent			
4/1/2015		1.00% Interest on \$892.00		\$8.92	
		Adjustment	Late Fee/Int. Charges		

ACCOUNT SUMMARY

Total Debits:	Total Credits:
\$1,408.92	\$200.00
Today's Balance:	\$1,208.92
Expected Insurance Payments:	\$0.00
Please Pay:	\$1,208.92

To ensure prompt credit to your account, please detach and return this bottom portion of your statement with your payment. Thank you.

Account: 1937562181: Fr. Test Test
Balance: \$1,208.92
Practice: Excellent Endo
Doctor: Gary B. Carr, D.D.S.

Check Detail:
Check No. _____

Credit Card Detail:
☐ Visa ☐ Mastercard ☐ Care Credit

Amount Paid: _____

Account No. _____ Exp. Date _____ Security _____
Name on card: _____
Signature _____