Adjusting how reports open in TDO

341 TDO KB October 13, 2025 New User resources, Site Configuration 8.93K

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.

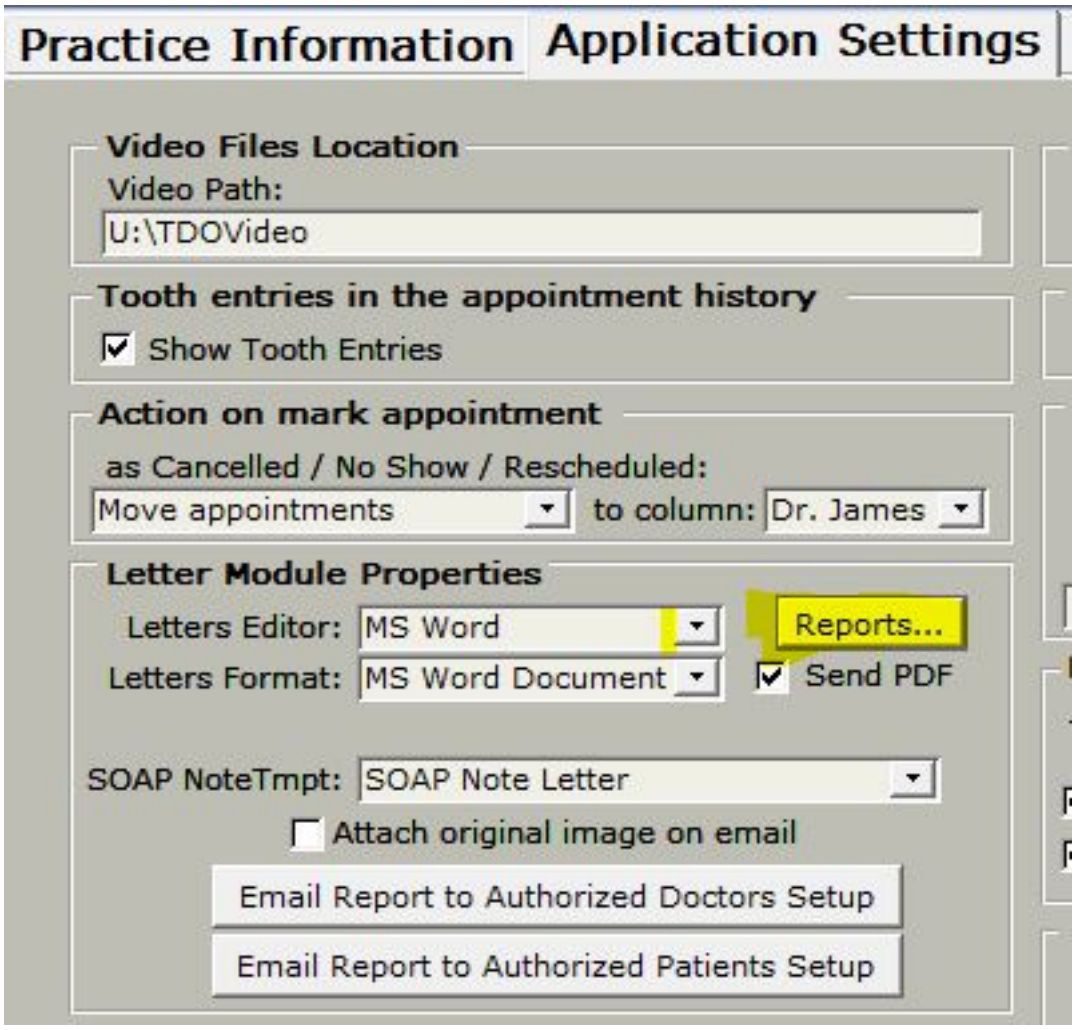
By clicking the **Reports** button you can specify to use the TDO report or your own letter. Set for all reports you wish to change.

Detailed Instructions

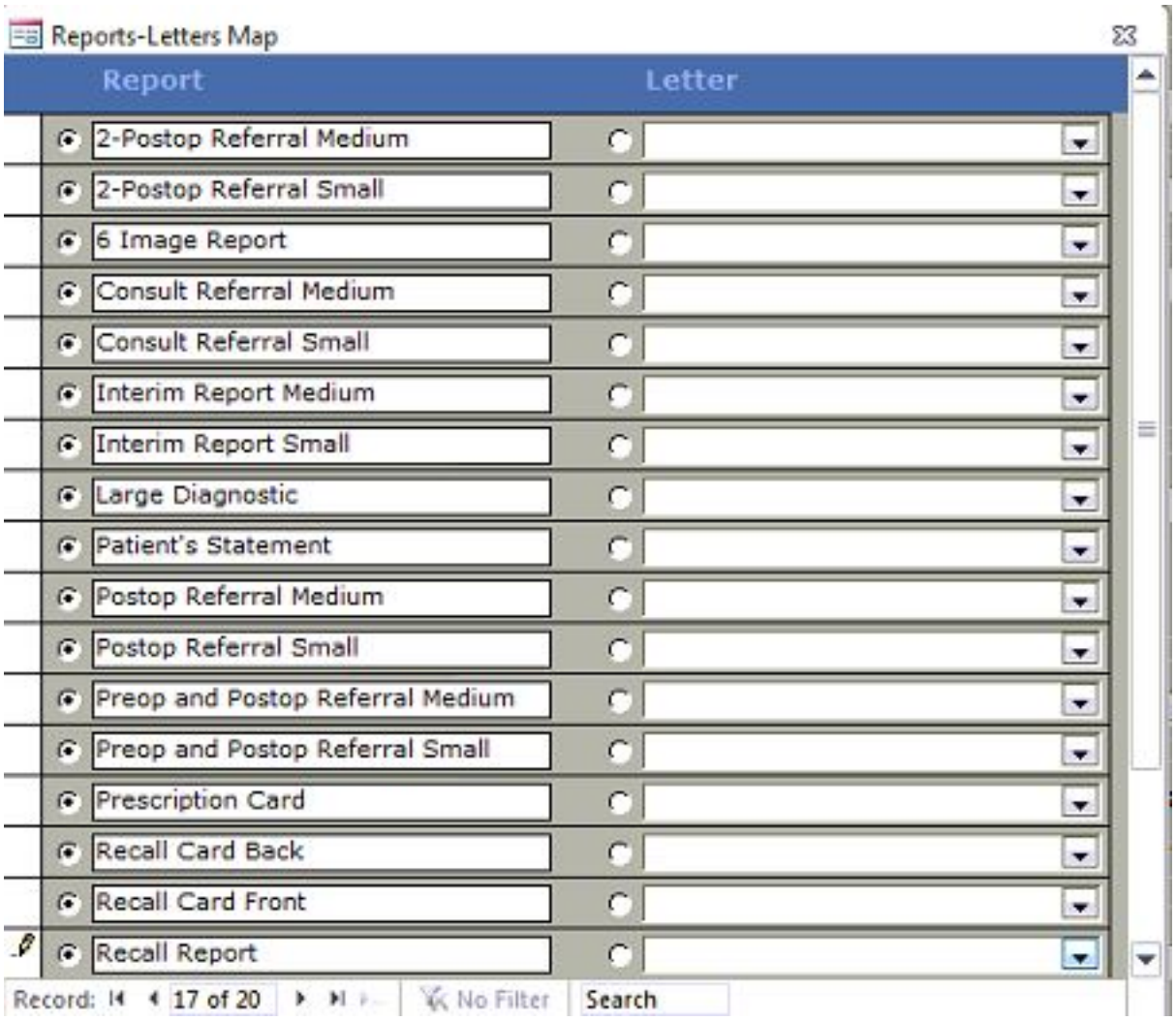
The first and most important step is to create a template in the Letters module that will substitute the built in report. As an example, attached to this article is a Word document that you can use for Patient statements. There are several other templates that you can download at **https://www.tdo4endo.com/TechnicalSupport/SupportMaterials.aspx**

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**



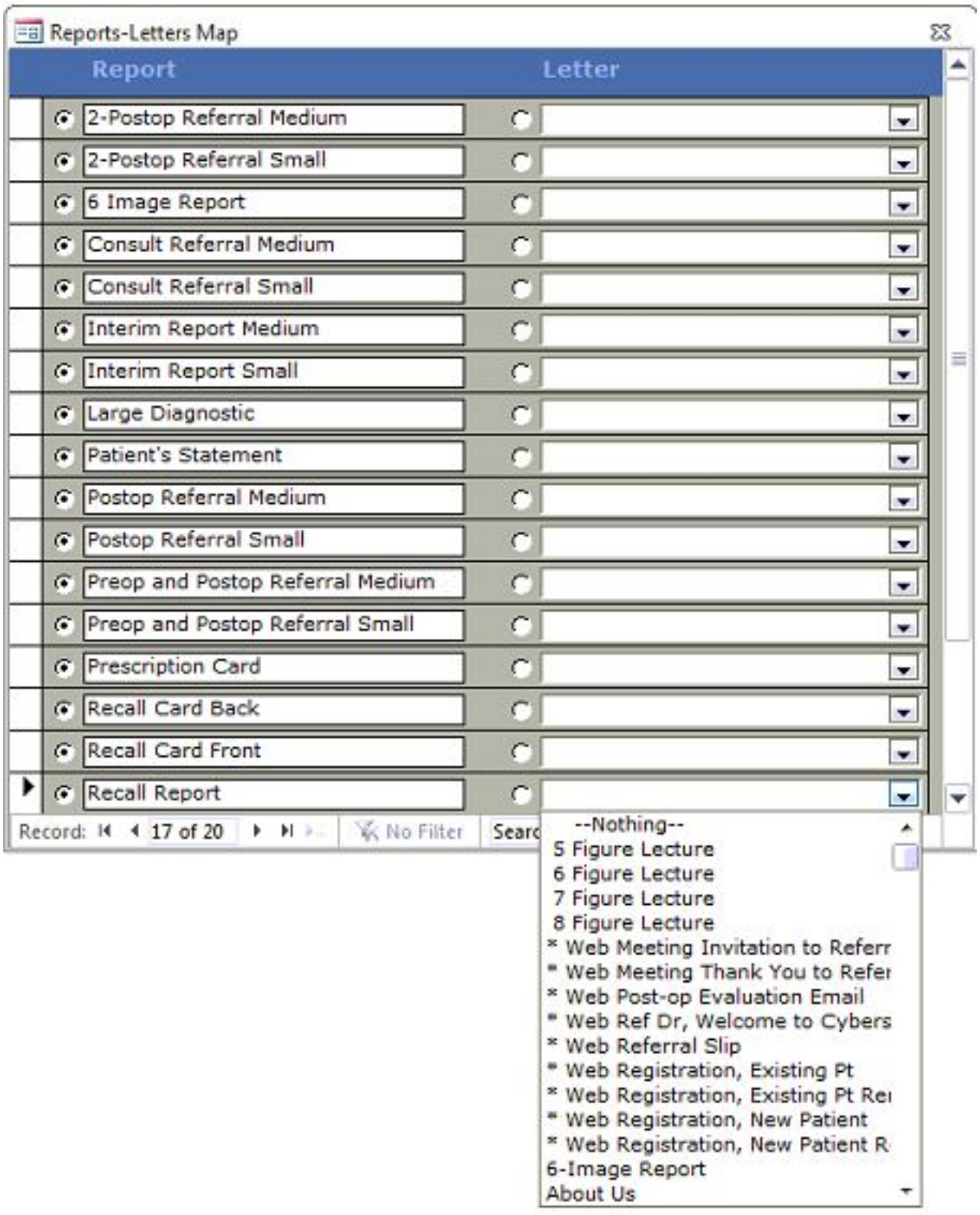
The **Reports-Letters Map** window will display a list of all the TDO reports that can be replaced with customized templates.



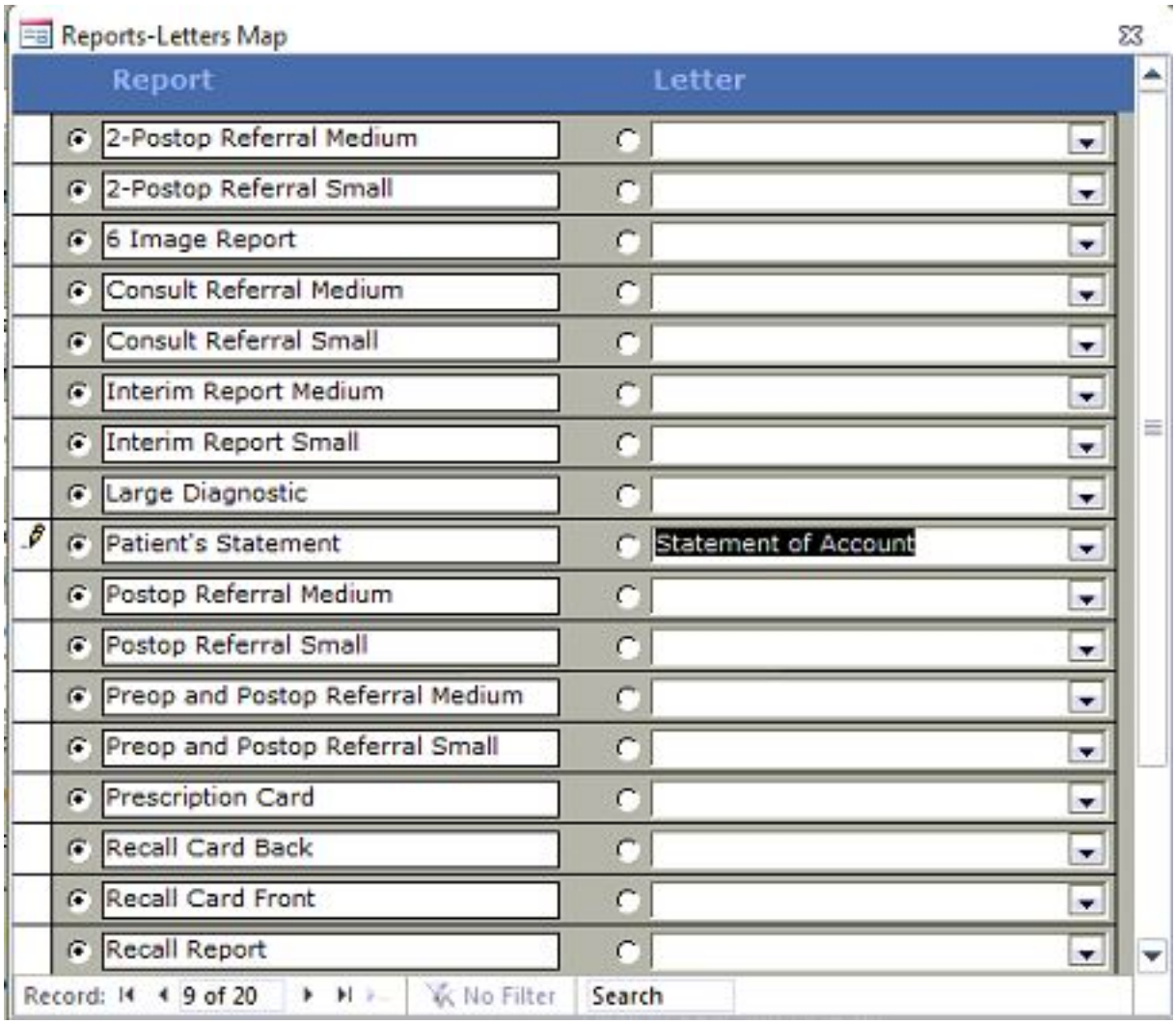
The **Report** column will list all the built-in reports.

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.

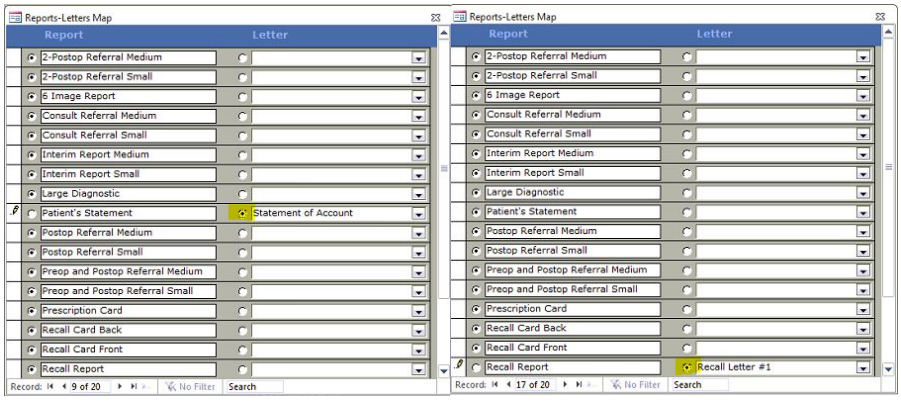
Once you click the 'dropdown' button, TDO will list all the letter templates available.

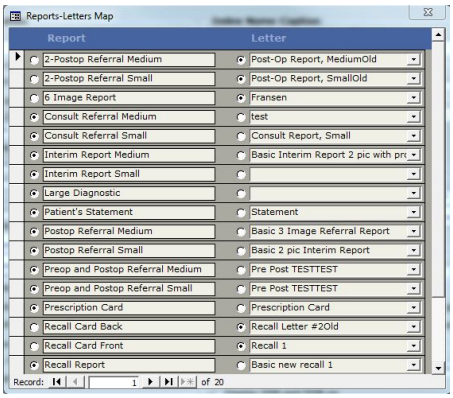


Once you have found the letter template from the 'dropdown' list, select it.



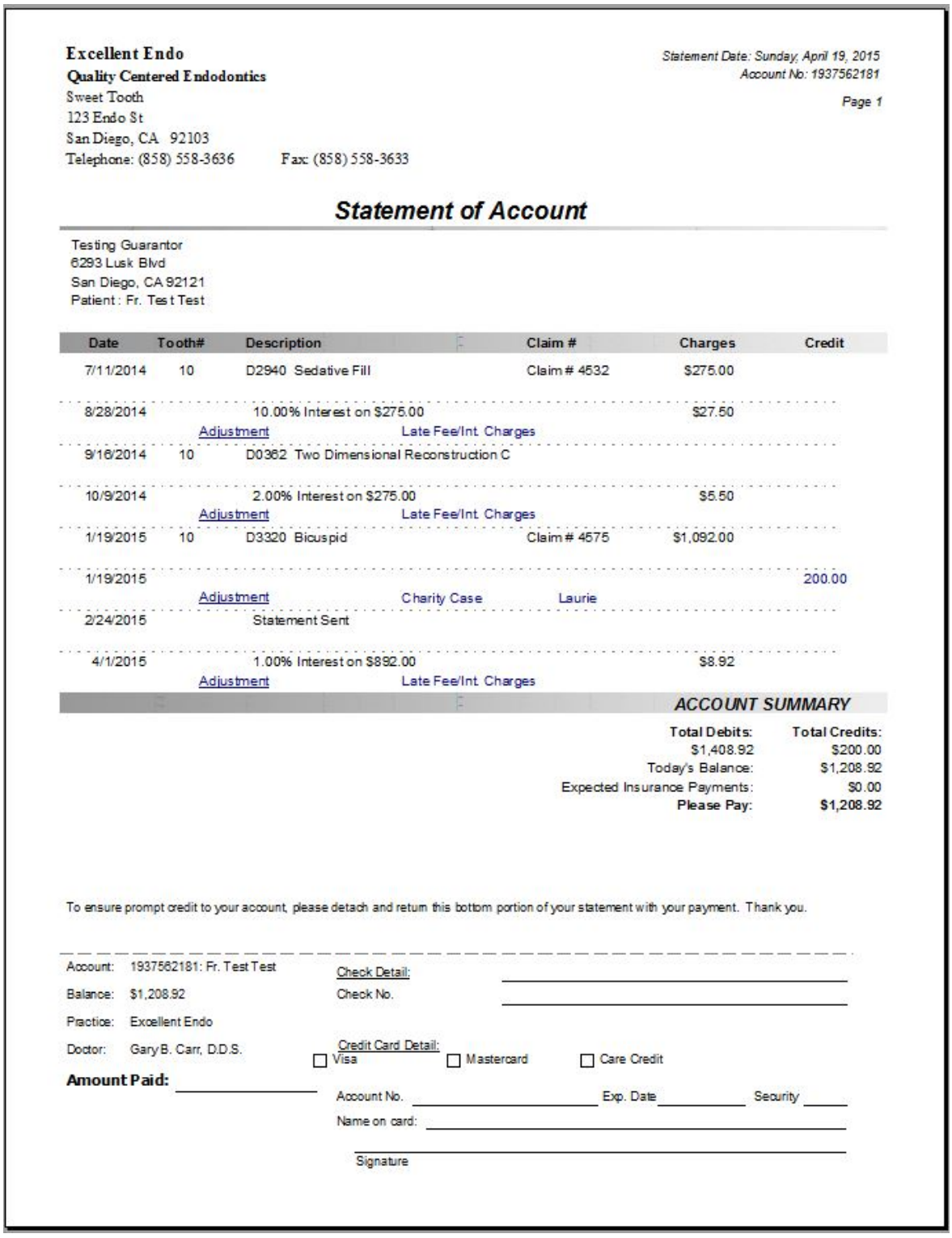
Then check the “round” box on the left side of the ‘Letter” field to select it.





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
Page 1

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.

Amount Paid: _____

Check Detail:
Check No. _____

Credit Card Detail:
☐ Visa ☐ Mastercard ☐ Care Credit

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

_____
Signature

Online URL: https://kb.tdo4endo.com/article.php?id=341