

Using Autonotes or Macro Note

426 [TDO KB](#) February 23, 2026 [New User resources](#) 5.82K

Overview

TDO allows for Notes that are commonly entered to auto-populate.

Detailed Instructions

To accomplish this task, go to the notes tab and select a note that is needed to populate under the drop-down of "Macro Note."

The screenshot displays the TDO software interface. At the top, patient information is shown: Last Name: Potter, First Name: Harry, Phone: 8585583696. A table lists dental appointments with columns for Tooth, Initial Date, Doctor, Comp Date, DI, Recall Date, ReportDate, and Location. The 'Notes' tab is selected, showing a list of notes. A dropdown menu is open for 'Macro Note', displaying a list of predefined notes such as 'After Treatment Follow Up', 'After treatment follow up apical Surgery', 'C&S and CaOH', 'CBCT/NoTx', 'Consult-needs RCT', 'Dental Insurance Quote I', 'E-Visit start', 'I believe implant data', 'Jeanine test', 'Obt only', 'Pack and restore with FJ', 'pain sensitivity', 'post-op eval entered', 'RCT (Core Build-up)', 'Replace CaOH', 'return visit', 'S&P encore heliomolar', 'Sharon's Test Note', 'Start RCT', 'Surgical consult', 'suture removal', 'td Bleaching/1st', 'td Bleaching/Final', 'td Bleaching/Interim', 'td Call to GD', 'td CH/interim', 'td Complete', and 'td Disc tx'. The 'Clinical Findings at this Visit' section includes checkboxes for various symptoms like 'Asymptomatic', 'Improved but slightly tender', 'Intermittent pain', 'Constant pain', 'Initially asymptomatic with recent pain', and 'Initially painful but now asymptomatic'. The 'Needed' section includes checkboxes for 'XRay from General Dentist', 'XRay from prior Endodontist', 'Send XRays to Oral Surgeon', 'Send XRays to Periodontist', 'Speak with physician', 'Need prior Endodontist's final report', 'Speak with General Dentist', 'Speak with prior Endodontist', 'Speak with Periodontist', 'Speak with Orthodontist', 'Speak with Oral Surgeon', 'Speak to patient after Doctors', 'Record to be Completed', and 'Predetermination of Fees'. The bottom status bar shows 'User: kevin', 'BP: Pulse: Temp: Alert: HM Med', and 'Powered By MICROSOFT ACCESS'.

To create or edit your macro notes "Right Click" on the drop-down menu and select Edit list this will allow for creation and adjustments of current notes

Last Name: T1
 First Name: T2
 Phone: T3
☐ Hide Alerts

Click to Paste Pre-op 1 Image

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
10	1/18/2019	CARR	4/23/2019	50		4/30/2019	ONE
8	1/10/2019	CARR		0			ONE
7	12/26/2018	CARR		0			ONE
1	4/17/2018	CARR		7	1/15/2020		ONE

Filter:

Current View:

ID#: R Date: Tooth:

☒ Tooth ☐ Patient ☐ Private ☐ Administrative

☒ Sort Descending

Date: Macro Note:

Category: ☐ Hide Note ☐ Show on web to referring

Comment by: ☒ Manual Entry

Clinical Findings at this Visit
☐ Asymptomatic ☐ Temp sensitivity
☐ Improved but slightly tender ☐ Swelling reduced
☐ Intermittent pain ☐ Swelling
☐ Constant pain ☐ Palpation soreness
☐ Initially asymptomatic with recent pain ☐ Percussion sensitivity
☐ Initially painful but now asymptomatic ☐ Sinus tract present
☐ Sinus tract healed

Needed
☐ XRay from General Dentist ☐ Speak with General Dentist
☐ XRay from prior Endodontist ☐ Speak with prior Endodontist
☐ Send XRay to Oral Surgeon ☐ Speak with Periodontist
☐ Send XRay to Periodontist ☐ Speak with Orthodontist
☐ Speak with physician ☐ Speak with Oral Surgeon
☐ Need prior Endodontist's final report ☐ Speak to patient after Doctors
☐ Record to be Completed
☐ Predetermination of Fees

☐ Send new referral report to referring doctor
☐ Send new referral report to:

You can shuffle through the records with "Next Note" or "Previous Note" or click the arrow with the sun to create a new macro note. Here is where you can also adjust the note text that will populate on the notes page if selected

Custom Macro Notes

Please enter a descriptive name for the note, the text for the note and the next visit (if one is necessary).

Name of Note:

Note:

Record:

To delete a macro note, click and highlight the bar on the far right, and press the "delete" key on your keyboard

Reference

For further information relating to Macro Notes, please check out this Video demo on an older version of TDO

Online URL: <https://kb.tdo4endo.com/article.php?id=426>