Program Setup Training

600 TDO KB February 23, 2026 New User resources, Program Setup 10.24K

Program Setup

Required Staff: Manager only and/or Doctor

The Program Setup is the first in the series of trainings after TDO has successfully been installed on your computers. It is designed as an introduction into the program and to prepare your office for future trainings.

Administrative Menu

- How to add/edit User Names and Passwords to log in to TDO (Adding Users and Security Levels)
- Edit Control Table: setting up your practice information, application settings, network settings (outgoing email) and workstation settings
- Edit Doctor Information: setting up doctor's name(s), NPI, DEA, license number and billing entity
- Electronic Claims Setup – setup with DentalXchange for U.S. user and iTrans for Canadian users (Adding Dental Exchange information into TDO)

Program Setup

- Appointment Setup – configuring the names of your appointments Appointment Setup
- Calendar, Times and Colors – editing time intervals, working times and non-working times
- Calendar, Color Blocks – setting up blocks for lunch, breaks and so forth
- Operatory Names – how to change the names of your operatory columns on the calendar Adding Operatory Names
- Formatting – editing the information that shows up within the appointments on the calendar (Editing the formatting of appointments on Calendar)
- Format String – selecting up to 3 icons to be displayed on the calendar; for example, latex allergy, appointment confirmation and so forth.
- Fees Listing/ADA Codes – changing the ADA codes and amount of each fee as needed. (How to add a fee code in TDO)
- Policy/Consent, Categories – setup area for the policy and consent forms you wish patients to sign; for example, the consent for treatment and HIPAA forms and the parameters you would like for each form; for example, the expiration date.
- Policy/Consent, Text – setup area for the text of your policy and consent forms.

Referring Doctors x general Dentists

How to add doctors to the system and preferred correspondence

Infograbber - Digital forms

What the Infograbber is and how to use it

Online URL: https://kb.tdo4endo.com/article.php?id=600