

Cloud Training Outline

625 [TDO KB](#) October 9, 2025 [Cloud Ribbon Menu](#), [New User resources](#) 23.44K

Topics Covered Include

Services panel in TDO

- Processes Running on Server
 - VPN connection and email for notifications
 - Offsite backup, which runs daily
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Patient Web Registration

- Patient Web Registration template
 - Check Edit Control, Network Settings (email/smtp settings)
 - Ask the patient to register online
 - Add the patient's email to their record
 - Generate Web ID and Password
 - Open Letters
 - Open Web Registration template and click "Save and Send" now
 - Add note to patient's appointment about "Web Reg"
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Email Notifications and Appointment Confirmation

- Check Edit Doctor Information, email addresses for notifications
 - Should receive 3 email notifications per patient registration
 - When confirming appointments, make sure web registration has been done
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Referring Doctor's Area

- Verify the referring doctor's Web ID and Password in the Doctor's area in TDO
 - Log in as a referring doctor to verify the information they see online
 - Ability to refer patients online
 - Web Share category for images
 - Share notes to the referring doctor on the web
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Admin Doctor's Area

- Admin doctor's Web ID and Password in Edit Doctor Information
 - Log in as the admin doctor to verify the information they can see online
 - Can view the schedule, call list of patients, and much more
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Online URL: <https://kb.tdo4endo.com/article.php?id=625>