

Replica Program Setup/Configuration

626 [TDO KB](#) February 14, 2026 [Replica](#) 9.47K

Overview

TDO's Replica service is used to synchronize data in real time between practices in a unified TDO database. Once TDO's Tech Support & IT Teams configure a new location(s) in the replica, you'll need to update some settings in TDO. Please review this article in its entirety and ensure that you have taken all the recommended steps to make sure that you are prepared to use TDO in a replicated environment.

Note:

NEVER disable the Replica service on your primary server. If the Replica ever needs to be disabled for any reason, TDO's IT team will do so.

Note

All workstations across all locations MUST have unique computer names. To see the name of your computer, strike Win + Pause/Break on your keyboard.

Detailed Steps

Practice Information

Open the Practice Information tab of the Control Table [Version 11: [Administrative > Edit Control Table > Practice Information], Version 12: [**Setup > Site Configuration > Edit Control Table > Practice Information**]]. In order to view and edit this information, you will need to log in as [a user that has been set at a security level which has access to this menu](#).

You can cycle through the practices by using the Record buttons at the bottom of this window (see screenshot below). You can identify which record you are editing by viewing the Network Settings tab. This tab will show you the Local Server Name and Server IP Address of the record in question. If you are not sure which server corresponds to which practice, you can ask your IT Professional.

Generally, one record will be reserved for Cloud Services. You can identify this record by viewing its Network Settings tab. The Local Server Name and Server IP Address will not be any values that you recognize. Once you have identified this record, be sure not to try to edit any fields therein; doing so will cause issues.

You will need to set Practice Names, Practice Addresses, and other information on the Practice Information tab for each record. Set a Location Nickname for each record (1-3 alphanumeric characters). This will be used to differentiate practice locations elsewhere in the program.

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Practice Name: Main location	Practice Street Address1: 6235 Lusk blvd
Practice Title: Hello we are so advanced we make advanced endo lo	Practice Street Address2:
URL of the main Web Site: www.tdo4endo.com	City: san diego
School 	State: CA
Practice NPI: 123	Zip: 92121
Location Nickname: ONE	Phone: 858-558-3636
Logo for Reports: Remove Logo	Fax: 8585583633
	☒ Enable AR filtering by overall patient balance
	☐ Emergency Mode
	☐ Inactive Inactive Comments:
Corporate Logo for Emails: C:\Users\Cheryl\Pictures\Testing Pictures\untitled.pn ...	☒ Enable Ledger Connections
Corporate Logo Location: Top Left	☐ Enable Centralized eClaim
	LC Last Run: 11/24/2020 4:11:44 PM
	Auto Updater
	Update Time: 12:00pm

Close

Record: 1 of 3 No Filter Search

Application Settings

The settings on the Application Settings tab of the Control Table are set per location [**Setup Tab > Site Configuration > Edit Control Table > Application Settings Tab**]. If you've already set these for your primary location, you'll most likely want to copy these settings from that record to the other records. You may wish to [add an operatory name](#) to contain the Cancelled / No Show / Rescheduled appointments from the new location.

Control Table
X

Control Table Information

Practice Information
Application Settings
Network Settings
Workstation Settings

Video Files Location
Video Path:
C:\TDOVideo

Tooth entries in the appointment history
☐ Show Tooth Entries

Action on mark appointment
as Cancelled / No Show / Rescheduled:
Move appointments to column: Reschedule

Letter Module Properties
Letters Editor: MS Word Reports...
Letters Format: MS Word (DocX) ☒ Send PDF
SOAP NoteTmp:
☐ Attach original image on email
Email Rpt to Authorized Dr Setup PDF Email Setup
Email Rpt to Authorized Pat. Setup

Automatic Financial Tickler
Insurance Auto Fin. Tickler Delay (days): 0
Non-Insurance Auto Fin. Tickler Delay (days): 0
☒ Enable Ins. Financial Tickler Pop-ups
☒ Enable Non-Ins. Financial Tickler Pop-ups
☐ Automatically Update Future Dates

Insurance
Delta Claim ID:
☒ Insurance Estimating ☐ Default to Non-Assigned
☐ New patient default to NO insurance
☐ Disable Insurance Comparison

Index Name Caption
Singular form: Tooth Plural form: Teeth

Message Viewer
☐ Run Messenger at Startup

Phone/Fax
Phone Prefix:

International
Culture: UNITED STATES
☐ Disable State Autofill ☐ General Dentist
Insurance Form: US ADA

Medical History
Type: Customizable Lang. Short Med Hist: English
☒ Show Pref. Language on Patient Chart Customize
☒ Enable allergy pop-up in prescription form

Diagnosis Form
Default Form Size: Long Diagnosis Form

Multiple Fee
☒ Enable Multiple Fee Schedules

SMS Options
☒ Allow Staff group to send SMS
☒ Check Send SMS automatically

Miscellaneous Settings
☒ Enable Procedure and Teeth Association ☒ Lock Manual Notes after: 24 Hours
☐ Display SSN and DOB on Ledger and Statement
☒ Show Patient\Ref Dr Pwds

Google Accounts - Calendar Sync
ERX ID Setup
Close

Integrated Devices

Record: 14 1 of 3 No Filter Search

Adding/Editing Teeth

After configuring the Location Nicknames, you'll be able to select the Location in a dropdown menu when adding or editing a tooth in a patient's chart. You'll see this Location shown in the last column of the tooth/case display when viewing a patient's record. If you need to change the location associated with a tooth, you can edit the case by clicking the edit button (highlighted in the screenshot below beneath the Add Tooth [+] button).

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
12	12/15/2020	CARR test		0			ONE

Change Tooth# or Initial Date

Change Tooth:

Existing

New

Tooth:

12

12

Initial Date:

12/15/2020

12/15/2020

Doctor:

CARR test

CARR test

Location:

ONE

TWO

Remove Tooth

Save

Cancel

Calendar

You may wish to [add or change operatory names](#) corresponding to rooms in the new replicated practice(s). One philosophy for this is naming the Operatories like the ones in the screenshot below. That is [Location 1 Nickname] Op1, [Location 1 Nickname] Op2, ... , [Location 2 Nickname] Op1, ..., etc. If you choose to name your operatories in this way, it may also be useful to rename the Custom View tabs in the calendar to correspond to the replicated locations, naming the tabs after the various locations, and selecting the operatories corresponding to the given location under that tab.

Number	Name of Op
10	Cancel/Reschedule1
20	Cancel/Rechedule 2
30	LOC 1 Op1
40	LOC1 Op 2
50	LOC 2 Op1
60	LOC 2 Op2

	Cancel/Reschedule1	Cancel/Reschedule 2	LOC 1 Op1	LOC1 Op 2	LOC 2 Op1	LOC 2 Op2
11:10 AM						
11:20 AM						
11:30 AM						
11:40 AM						
11:50 AM						
12:00 PM						
12:10 PM						
12:20 PM						
12:30 PM						
12:40 PM						
12:50 PM						
1:00 PM						
1:10 PM						
1:20 PM						
1:30 PM						
1:40 PM						
1:50 PM						
2:00 PM						
2:10 PM						
2:20 PM						
2:30 PM						
2:40 PM						
2:50 PM						
3:00 PM						
3:10 PM						
3:20 PM						

The calendar custom view tabs can be updated here: **Setup Tab > Program Setup > Calendar > Times and Colors**

You may want to create a custom view to see only columns associated with a specific location. Another option is to create a custom view per doctor, so the doctor can easily view their schedule at all locations.

This setting is configured **per workstation** and must be applied individually on each computer. It cannot be automatically updated across all devices.

Calendar									
La Jolla Office Del Mar Office Downtown Office Daily - 1 Op Weekly-by Op Monthly Day Detail Task List									
New appointment AM PM Prime Search Time Friday, February 13, 2026 Today									
Images Patients									
February 2026									
S M T W T F S									
1 2 3 4 5 6 7									
8 9 10 11 12 13 14									
Hide Calendar									
Cancel/Reschedule Cancel Loc 2 Dr. Carr									
Dr. Carr Dr. Belle Phone Consults Dr. Smith Cancel/Reschedule Cancel Loc 2 Dr. Carr Loc 2 Dr.									
1:50 PM									
2:00 PM									
2:10 PM									
2:20 PM									
2:30 PM									

Doctor Information: Billing

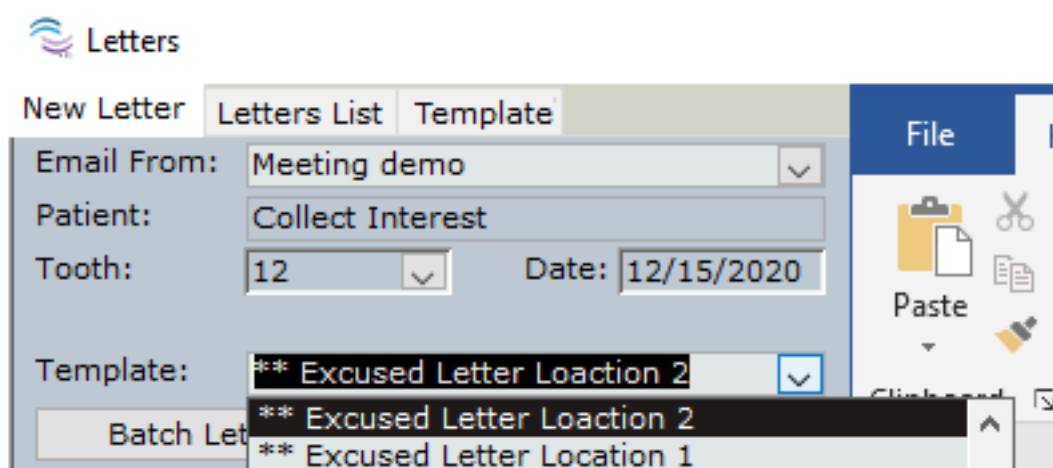
Open Doctor Information (Version 11: [Administrative > Edit Doctor Information], Version 12: [**Setup > Site Configuration > Edit Doctor Information**]). If the doctor(s) uses/will use different Tax ID Numbers for different locations, it may be necessary to create a distinct doctor record in TDO for each additional location. [Contact TDO Support](#) for more information.

Policy and Consent Forms

The same [policy and consent forms](#) (Version 11: [Program Setup > Policy/Consent], Version 12: [Setup > Program Setup > Policy/Consent]) are used for all locations. There are two approaches to this: a) make sure that your forms are applicable to all locations, b) create forms individualized for each location, and name them accordingly so that patients at Location 1 fill out 'Informed Consent L1', patients at Location 2 fill out 'Informed Consent L2', etc.

Letters Module

Your templates may use certain tokens that pull information from the Practice Information tab. Templates that use these tokens will work for all locations, as the template will populate this information from the respective location at the time when a New Letter is generated using the template. If you are using an image (such as a letterhead) containing your practice title and/or address in any templates, you may want to create copies of these templates to be used at the other locations, with an image, or text, or tokens, that will cause that template to display the information of the corresponding location.



Electronic Claims

For DentalXChange users who have integrated their ClaimConnect services with TDO will discover that each TDO location within a replica needs to have the ClaimConnect credentials configured. For instructions on this, please see [this article](#).

This is the only setting that must be configured at the **physical location**.

Electronic Prescriptions (eRx)

If you are using MDToolbox's integrated [eRx services](#) with TDO, you will need to enable eRx at the new

location for each eRx prescriber.

Setup tab > Site Configuration > Edit Doctor Information > Doctor Location Setup button

The screenshot shows the TDO software interface. The 'Setup' menu is open, and 'Edit Doctor Information' is highlighted. The 'Doctor Information' form is displayed, showing fields for 'First Name', 'Middle', 'Last Name', 'Mobile', 'Specialty', 'License Number', 'Classification', 'Licensing State', 'Tax ID Number', 'Web ID', 'Web Pwd', 'TDO4Endo.com', 'Credit Card Pmt Merchant ID', 'NPI', 'SMS Login', 'SMS Password', 'Birthdate', 'Multiple Fee Schedule', '1st email for Web notification', '2nd email for Web notification', 'User name used to login in TDO', 'TDO Outcomes Research ID', 'Billing doctor', 'Billing Address', 'Provider ID Setup', 'Insurance First Name', 'Ins. Middle', 'Insurance Last Name', and 'QuickBooks File Location'. The 'Doctor Location Setup' button is highlighted in yellow.

Filter Data: Select 'Dr Name' > Filter button

In a new blank row: Select Dr name, Select Location, and check eRx Enable

Repeat for each eRx prescriber

The screenshot shows the 'Doctor-Location Setup' form. The 'Filter Data' section shows 'Dr Name' set to 'Endodontics'. The table below lists doctor locations with columns for Dr Name, Location, Merchant ID, Merchant ID Web, Merchant Web PW, CC Username, CC Password, and Snapshot Rpt. The 'eRx Enable' checkbox is checked for the first two rows.

Dr Name	Location	Merchant ID	Merchant ID Web	Merchant Web PW	CC Username	CC Password	Snapshot Rpt
Endodontics	123 second location	755847002					☒ eRx Enable ☐ Inactive
Endodontics	6235 Lusk Blvd						☒ eRx Enable ☐ Inactive
							☐ eRx Enable ☒ Inactive

Credit Card Processing - TDO Payments

If you are using TDO Payments integrated services, changes may need to be made to the settings in order for these services to continue to function in a replicated environment. [Contact TDO Support](#) for more information.

Online URL: <https://kb.tdo4endo.com/article.php?id=626>