

Letters Training Outline

645 [TDO KB](#) February 23, 2026 [New User resources](#) 6.48K

Overview

- All correspondence to patients and referring doctors and how to customize your reports and letters will be covered in this training session
- Understanding The 3 tabs - New letter, Letter list, Template
- New letter tab
- How to print and/or email a document
- How to add additional information or change pictures if necessary
- To send or print click save and send, if you'd like to send or print later click save
- PDF only option and Link only when Cloud services is available
- Letter list
- How to confirm that a letter is saved or saved and sent
- All letters and correspondence created and saved or sent are stored here for later review
- Template
- All permanent changes are made under the template tab, once changes are made in a template it will stay that way for all the patients and doctors
- Understanding some templates are fixed; they come with TDO but you can always mark as "don't use this template"
- Default Delivery options
- How to create a specific delivery method per document
- Basic Microsoft Word functions to create professional letters and clinical reports

Online URL: <https://kb.tdo4endo.com/article.php?id=645>