

TDO Training Protocol

672 [TDO KB](#) February 24, 2026 [New User resources](#) 63.51K

Overview

Here are the 5 steps to do before going "Live" with TDO

Step 1 - TDO University

Step 2 - Installation

Step 3 - TDO Checkout

Step 4 - Program Setup

Step 5 - TDO Training Sessions

Trainings are implemented on separate days to maximize the TDO learning experience. We suggest scheduling training two weeks in advance of the desired date. Training is available to schedule Monday-Friday between the hours of 8 AM & 4 PM Pacific Time.

Pre-training Tasks

Assign an employee to be the TDO Engagement Manager, this person will be the main point of contact for our Practice Relationship Coordinator during the setup process.

Please sign your Cloud Usage Contract if you have not done so already. Cloud Services will be installed once we have access to your server.

Have your office policies and consents saved as a Word document.

If interested please setup a Credit Card service that integrates with TDO.

US only - If interested in filing electronic claims through TDO please set up an account with [DentalXChange](#)

Decide what email you want to use to send Letters and Reports in TDO.

Once TDO is installed explore the Dogbreath Demo software on any computer TDO is installed.

Username: endo

Password: endo

Step 1 - TDO University

Have each of the team members register at [TDO University](#) and create their own unique account. You can have as many accounts as you want.

Please have each employee at the office watch all online training sessions.

Admin - Designed to teach you the fundamentals of how to perform basic admin tasks in TDO software (18 lessons).

Clinical – This course is designed as an overview of the clinical modules available in TDO (18 lessons).

Cloud – (2 lessons)

Letters Module – (2 lessons)

Step 1 Achievements:

1. You have a basic understanding of how the program works.
2. Your IT is in the process of setting up your network and preparing the computers for installing TDO.

Step 2 - Computer and Network Configuration

Please have your IT access the installation files by going to [TDOer Login](#) with the doctor's login credentials. Once logged in, go to Download TDO.

For any documents needed to install and configure TDO, you can access [TDO Support Knowledgebase](#).

TDO has its own backup utility. You must use the [TDO Backup](#) utility to backup TDO. We recommend that you backup to a local hard drive to keep on site and to an external hard drive to take off-site each night.

Step 2 Achievements:

1. All computers have TDO installed, including any tablets.
2. All computers have been configured and are ready for checkout.
3. TDO Backup configured on an Admin computer.
4. You have scheduled your TDO trainings and have a live date in mind.

Step 3 - TDO Checkout

Before we start training and after your IT has completed step 2, we do a "TDO Checkout". On Checkout

day, we connect to each workstation and server through Bomgar. You will go to tdo4endo.com and click on [TDO Support Portal](#). We will give you a session key that will allow us access to each computer. We keep the sessions "pinned" for easy access up to 3 months after you have gone live.

Step 3 Achievements:

1. Checkout is complete on all computers.
2. Digital radiography has been set up and tested.
3. The TDO backup is set up and running each night.
4. You are becoming more comfortable moving through the tabs in the Dogbreath Demo software and are starting to explore the drop-down menu options

Step 4 – Program Setup

2-hour program set up with the doctor and office manager.

The Program Setup covers the preliminary information you will want to configure in TDO after it has successfully been installed on your computer.

It is designed as an introduction to the program and to help prepare your office for future trainings. It also serves as an introduction to the TDO Technical Support team. They will do their best to tailor the trainings to match how your office works.

This session primarily focuses on the Administrative menu and Program Setup areas of TDO.

Step 4 Achievements:

1. All your office information has been entered into TDO.
2. You understand the different areas of TDO and are beginning to see how they relate to each other.

Step 5 - TDO Training Sessions

As long as all TDO University videos have been completed, we can begin your training sessions with Ingrid.

On the day of training, we will use a remote connection to a computer that has been through the Checkout process. If you have several staff present, you can use a projector connection to that computer. Here is a link that will show you how to do that. [Connect to a projector](#).

Q&A - 1 or 1.5-hour training with doctor or office manager, questions about the videos can be answered at this time, as well as specific TDO questions.

TDO Cloud Usage – 1.5-hour training attended by all staff responsible for web utilization

Office Flow – 1.5-hour training before going live.

Go Live with TDO!

We recommend that when scheduling patients that first week that you leave some additional time between appointments.

Advanced Admin. – 1.5-hour training 2 weeks after live date

Additional

QuickBooks Training - The TDO QuickBooks sync is a one-way sync to the desktop version of QuickBooks. This training covers setup and the use of TDO sync to QuickBooks.

Step 5 Achievements:

You and your staff fully understand how TDO works and are confident performing basic steps. You realize it will take time and practice before you are completely comfortable with TDO. You are now exploring more advanced areas of TDO. You know how to reach the TDO technical support and how to use the Live Chat feature on the [tdo4endo.com](https://kb.tdo4endo.com) website. You have also explored the TDO Knowledge Base for articles on areas of interest in TDO or for help with an issue.

Online URL: <https://kb.tdo4endo.com/article.php?id=672>