

Ability to access Cloud Reports from ADMIN login

758 [TDO KB](#) February 25, 2026 [Cloud Ribbon Menu](#), [Reporting Tools](#) 19.77K

Overview

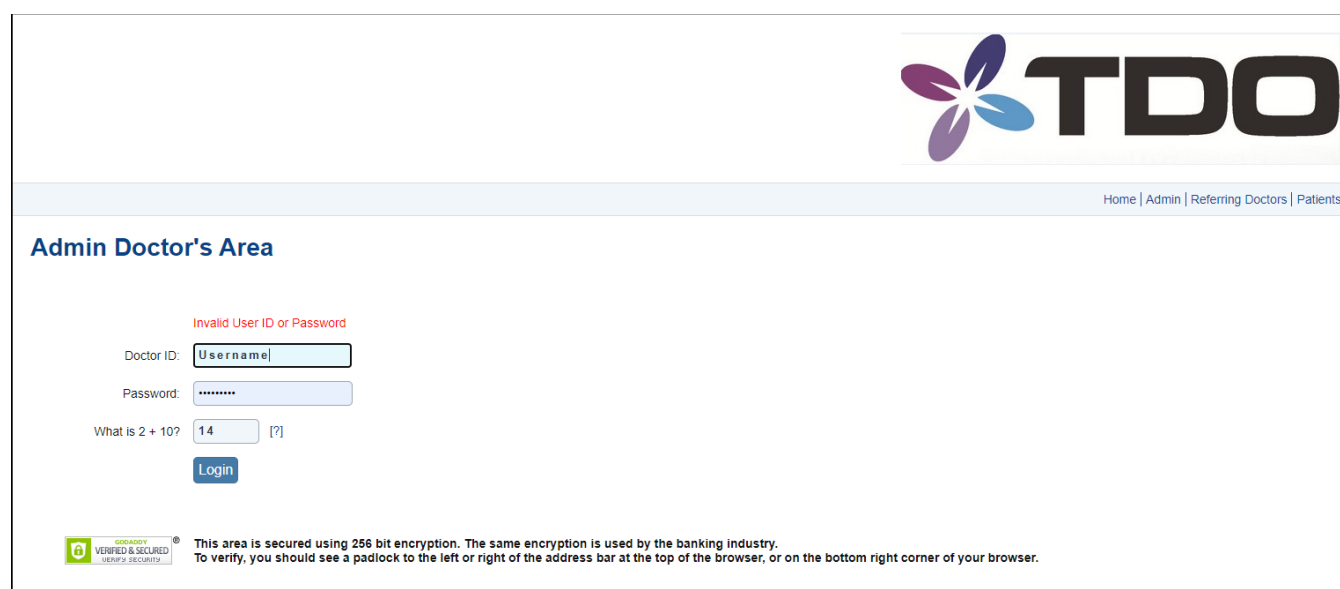
Cloud Reports are also available online! Refer to the information below.

Prerequisites

TDO v11 or higher, TDO Cloud services, Microsoft Excel (reports are downloaded in .xlsx format)

Detailed Instructions

- In a browser, go to the provider's website
- Find the **Admin Login** portal, usually accessible from a navigation menu on the site





[Home](#) | [Admin](#) | [Referring Doctors](#) | [Patients](#)

Admin Doctor's Area

Invalid User ID or Password

Doctor ID:

Password:

What is 2 + 10? [\[?\]](#)

[Login](#)

 SECURITY
VERIFIED & SECURED
VERIFYS SECURITY

This area is secured using 256 bit encryption. The same encryption is used by the banking industry.
To verify, you should see a padlock to the left or right of the address bar at the top of the browser, or on the bottom right corner of your browser.

- Log in using the provider's TDO credentials (the same that you use to log into the TDO application), and answer the security question
- Click on **REPORTS AND TOOLS**
- Click on **MANAGEMENT DASHBOARD**

Admin Doctor's Area

PATIENT INFO REFERRING DOCTOR INFO SCHEDULED PATIENTS **REPORTS AND TOOLS** LOGOUT

REPORTS PATIENT EVALUATIONS **MANAGEMENT DASHBOARD** SERVICES PANEL LEXICOMP ONLINE WIZARD LOGIN

☒ TDO Charts

☐ TDO Reports

Report Year: 2021

Report Month: April

Results Per Page: 10

Locations: Show All

Submit

- Check the **TDO REPORTS** checkbox.

☐ TDO Charts

☒ TDO Reports



TDO Cloud Reports

Carr Endodontics TDO Practice

Financials

[Aging Analysis](#)
[Bank Deposit By Date](#)
[Busiest Day](#)
[Case Disposition List](#)
[Case Summary](#)
[Code Breakdown by Date Range](#)
[Code Breakdown by Multi Fee ID](#)
[Collection by Codes](#)
[Completed Cases by Completed Date Range](#)
[Credit Balances Broken Down by Location and Doctor](#)
[Daily Breakdown by Month of Collection & Production](#)
[Debit & Credit Adjustments](#)
[Insurance Claims Broken Down by Location and Doctor](#)
[Monthly Snapshot](#)
[Outstanding Claims by Insurance Carrier](#)
[Outstanding Claims Consolidated List](#)
[Patient Balances with all Claims Closed \(Experimental\)](#)
[Patient Insurance List](#)
[Patient Production by Date](#)
[Procedures with No Claims](#)
[Production/Collection by Month](#)
[Snapshot Summary](#)
[Snapshot with Other Breakdown](#)

Patients

[Cancelled or Rescheduled or No Show Appointment List](#)
[Ledger Adjustment Tool List](#)
[Patient Credit Balances](#)
[Patient List](#)
[Patients Seen by Location and Doctor](#)

Referring Doctors

[All Referring Doctor List](#)
[Patients Referred and not Scheduled](#)
[Referrer Annual Report](#)
[Referrer Annual Revenue Report](#)
[Referrer Annual Revenue Report by Date Range](#)
[Referrer Revenue Alerts](#)
[Referring Doctor Events](#)
[Referring Doctor List By Created Date](#)
[Referring Doctor Total Patients and Total Billed](#)
[Referring Dr Rank By Total Billed](#)

For more information about Cloud Reports, click [here](#).

Online URL: <https://kb.tdo4endo.com/article.php?id=758>