

[v12.348g and above] CloudPBX Software - dialing out from TDO

776 [TDO KB](#) November 21, 2025 [Cloud PBX](#), [Site Configuration](#) 5.59K

Overview

Users can dial out of TDO Software using the CloudPBX integration.

Prerequisites

This feature is only available in **TDO versions of v12.348g and above**, that are already setup with TDO's **CloudPBX 3CX system integration**. For further details on these prerequisites please visit the below links:

Updating TDO version 12 - [Knowledge Base \(KB\) article 643](#)
CloudPBX Software - [Knowledge Base \(KB\) article 682](#)

At this time, only **3CX version 18** is supported. For the **3CX version 18** file please reach out to your VOIP provider/ CloudPBX Vendor to install the file.

Detailed Instructions

In TDO, go to **Setup>Site Configuration>Edit Control Table** and click on the “**Application Settings**” tab.

Control Table

Control Table Information

Practice Information **Application Settings** Network Settings Workstation Settings

Video Files Location

Video Path:

Tooth entries in the appointment history

☐ Show Tooth Entries

Action on mark appointment

as Cancelled / No Show / Rescheduled:

Move appointments to column:

Letter Module Properties

Letters Editor: Reports...

Letters Format: ☒ Send PDF

SOAP NoteTmpt:

☐ 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):

Non-Insurance Auto Fin. Tickler Delay (days):

☐ 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: Plural form:

Message Viewer

☐ Run Messenger at Startup

Phone/Fax

Phone Prefix:

International

Culture:

☐ Disable State Autofill ☐ General Dentist

Insurance Form:

Medical History

Type: Lang. Short Med Hist:

☒ Show Pref. Language on Patient Chart

☒ Enable allergy pop-up in prescription form

Diagnosis Form

Default Form Size:

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:

☐ Display SSN and DOB on Ledger and Statement

☒ Show Patient\Ref Dr Pwds

Record: 1 of 3 No Filter Search

Verify that the Phone/Prefix number field is cleared out.

Index Name Caption

Singular form: Plural form:

Message Viewer

☐ Run Messenger at Startup

Phone/Fax

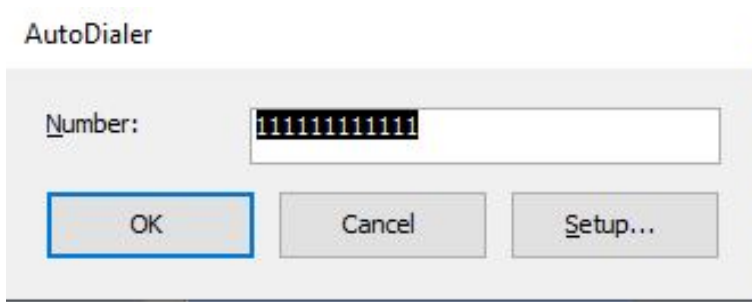
Phone Prefix:

Exit CloudPBX / 3CX application

Verify that **3CX version 18** is installed. Otherwise, contact your CloudPBX vendor for help with installation.

Restart CloudPBX application.

Launch TDO and double-click a Phone Number in either the Home, Work, or Mobile fields. This window should pop up.

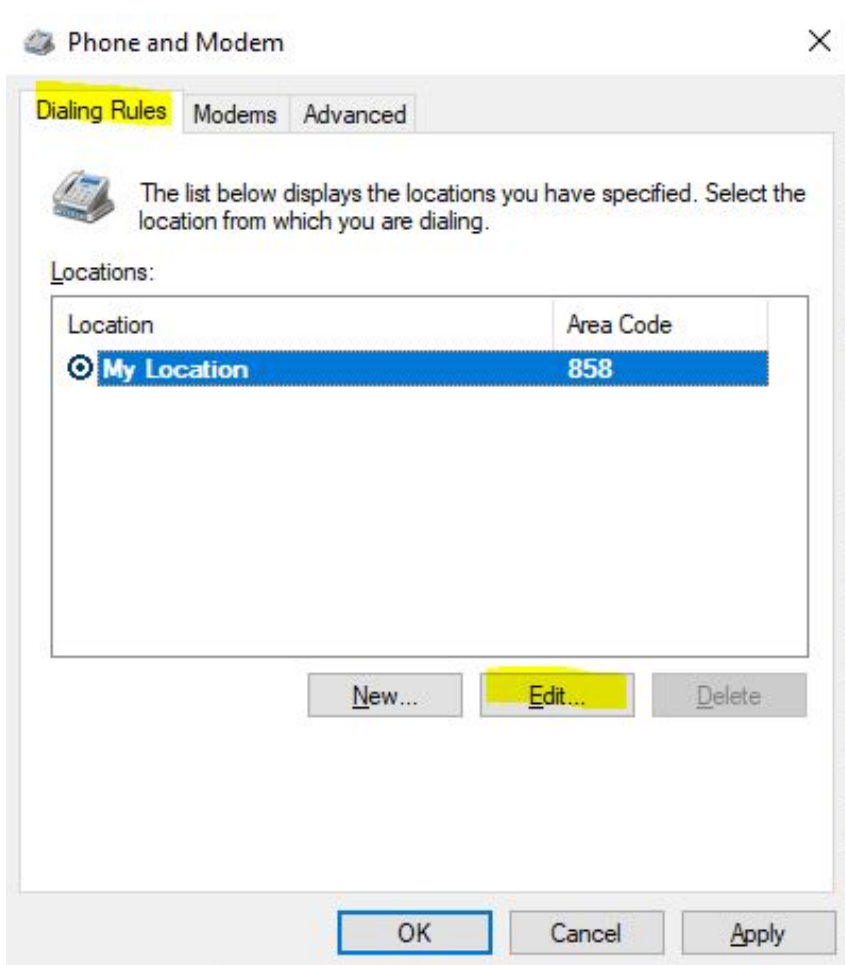


Click on the **Setup...** button.

Fill out your location information and area code, and then press OK.

The screenshot shows two input fields. The first is a dropdown menu labeled 'Country/region:' with 'United States' selected. The second is a text field labeled 'Area code:' containing the value '123'.

On the Phone and Modem screen select the "**Dialing Rules**" tab, make sure "**My Location**" is selected, and click on "**Edit**". If the Phone and Modem window does not automatically appear, it can be accessed through the Control Panel (**Control Panel>Phone and Modem**).



In the "**General**" tab fill out the "**Country/Region**" and "**Area Code**". These are required fields.

Country/region:

United States

Area code:

123

Go to the “**Area Code Rules**” tab and select “**New**”.

The screenshot shows the 'Edit Location' dialog box with the 'Area Code Rules' tab selected. The dialog has three tabs: 'General', 'Area Code Rules', and 'Calling Card'. The 'Area Code Rules' tab contains a text box explaining that an area code rule determines how phone numbers are dialed. Below this is a table with three columns: 'Area Code', 'Prefixes', and 'Rule'. The table is currently empty. Below the table are three buttons: 'New...', 'Edit...', and 'Delete'. Below these buttons is a 'Description' section with a text box containing the instruction: 'Select a rule in the list above to view its description, or click New to add a rule.' At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

Edit Location

General Area Code Rules Calling Card

An area code rule determines how phone numbers are dialed from your current area code to other area codes and within your area code.

Area code rules:

Area Code	Prefixes	Rule
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New... Edit... Delete

Description

Select a rule in the list above to view its description, or click New to add a rule.

OK Cancel Apply

- Type in the location’s Area Code then select checkbox to “**Include the area code.**”

Edit Location

New Area Code Rule

This area code rule will only apply to calls made to the area code and prefix combination you specify below.

Area code you are calling:

Area code: Prefix:

X - X X X - X X X - X X X X

Prefixes

Specify the prefixes to be used for this area code rule.

☒ Include all the prefixes within this area code

☐ Include only the prefixes in the list below:

Prefixes to include:

Rules

When dialing phone numbers that contain the prefixes above:

☐ Dial:

☐ Include the area code

Click **OK** \ Click **OK** again \ Click **OK** again

Now every time you double click a phone number the **AutoDialer** will come up

AutoDialer

Number:

Click **OK** and your 3CX / CloudPBX application will make the call.

Online URL: <https://kb.tdo4endo.com/article.php?id=776>