How to update TDO - Version 12

879 TDOKB2 September 8, 2025 Setup 13.85K

Overview

This article will guide you through how to update your TDO from an existing version of TDO 12 to the latest version of 12.

Non-update Installations

For directions on how to install TDO - not update the program - on a server or computer, please visit the following linked article: KB 643.

TDO v11 and/or Replicated Practices

Offices that are currently on **TDO version 11** and/ or are a **replicated office** wanting to upgrade, please stop here and contact TDO Support. If you are not sure if either of these apply to your office, please contact TDO Support to confirm.

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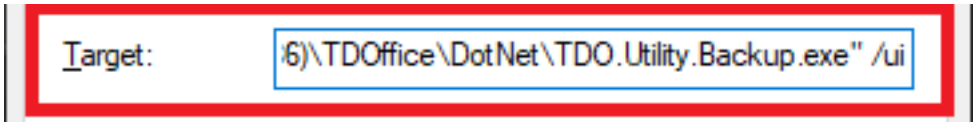
Prerequisites

Before we begin the update, there are a few things we want to do.

- Review KB 619 to confirm all minimum software & hardware requirements are meet for version 12: TDO installation - update requirements
- Ensure **TDO is closed on all workstations** - TDO will be temporarily non-functional during the upgrade process

The following steps are best done on the server computer:

- Run a manual backup of the TDO database by going to **C:\Program Files (x86)\TDOffice\DotNet\TDO.Utility.Backup.exe**
- Right-click **TDO.Utility.Backup.exe** and select **Send To** and then click **Desktop**
- Locate the **Backup Utility** shortcut (**TDO.Utility.Backup.exe**) that was created on your **Desktop**, right-click and select **Properties**
- Under the **Shortcut** tab, in the **Target** window, without editing the existing path, add **a space** and **"/ui"** after what already is in the window

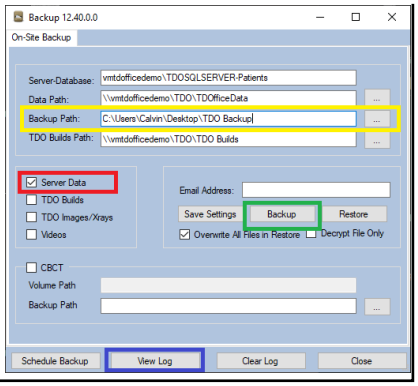


- Click **Apply** to save and **OK** to close the window
- On the **Desktop**, right-click **New** and select **Folder** - name this "**TDO Backup**"
- On the **Desktop**, open the **Backup Utility** shortcut (**TDO.Utility.Backup.exe**)

Incorrect Target window path

If, after completing the above steps and opening the **Backup Utility** shortcut, it does not open the **User Interface (UI)** (seen in the following image) then close the window that opened and double check that the **Target** window path is set with **a space** and **"/ui"** (no quotation marks around /ui).

- Within the **Backup Utility** window update the below two (2) items:
  - **Highlighted in Yellow:** In the **Backup Path** window use the **ellipses** (**...**) to navigate to the newly created "**TDO Backup**" folder on the **Desktop**
  - **Highlighted in Red:** Ensure that only **Server Data** is checked off (doing so will only backup the database which is what we want)
- **Highlighted in Green:** Click **Backup**
- **Highlighted in Blue:** To confirm the backup completed successfully, "without error," open the **Backup Utility** shortcut and click on **View Log**
- Scroll to the bottom of the backup log - the last line should read **"Backup completed without errors"**



Backup completed with errors

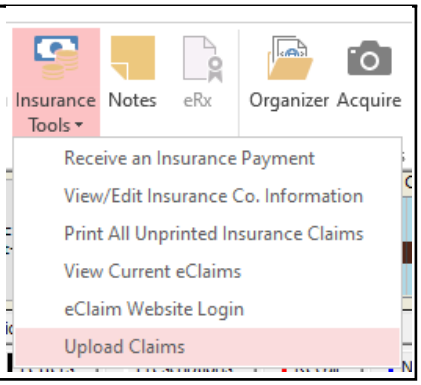
If the backup does not say **"completed without errors"** or says **"completed with errors,"** please contact TDO Support.

The following steps must be done using an Internet Browser:

- Navigate to the **TDO4Endo website**: https://tdoer.tdo4endo.com
- Using the **doctor's TDOer login credentials**, login
- Once logged in, select **Download TDO**
- Scroll to and click **UPGRADING TO THE LATEST VERSION OF TDO? CLICK HERE!** - a list of files needed for the installation will appear
- Download each file and place it within the **"TDO Builds"** folder on the **server**

The following steps must be done within the TDO application:

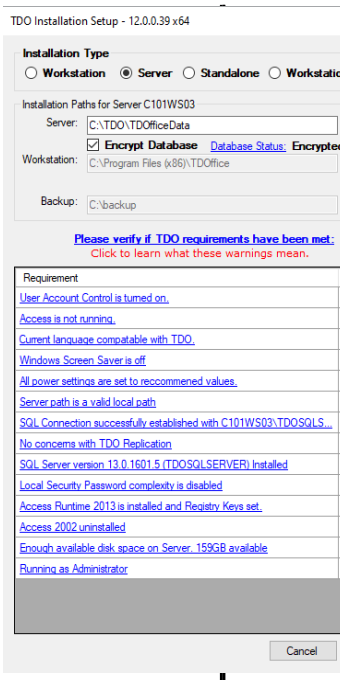
- Launch & log into **TDO**
- Under the **Main Ribbon Menu** select **Insurance Tools**
- Select **Upload Claims** - if this is greyed out then there are no claims needing to be uploaded
- Close **TDO**

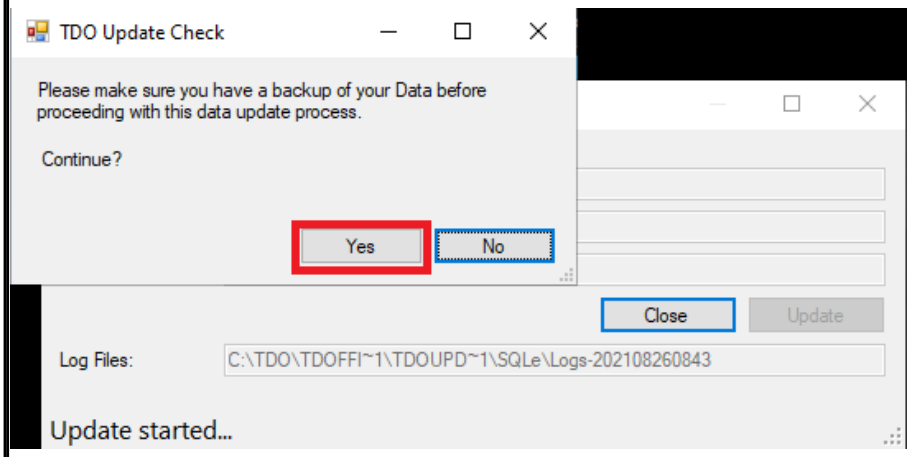


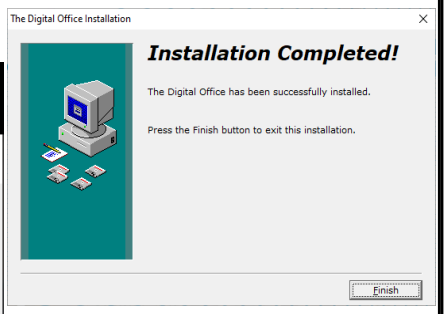
Instructions

Server Update

- On the **server**, navigate to the **"TDO Builds"** folder where the installation files are saved
- Run **TDOProfessional124xxx.exe** to install the latest TDO build
- Read through the **License Agreement**, if you agree, click **I Agree** to proceed with the install
- Under the **Installation Type** section, select **Server**
- Click **Verify** - this will prompt the installer to check and generate a list of requirements necessary for TDO to run
- Click **Next** to proceed with the installation - if there are any **red X marks**, the **Next** button will remain greyed out and unclickable until they are cleared
- Let the installer run
- A **TDO Update Check window** (shown below) will pop up in the bottom right of the screen, click **Yes** to proceed
- If the installation prompts for a **reboot**, proceed with restarting the computer - **should issues persist call TDO Support**







- Once the process is complete, the window will read **"Installation completed!"**
  - **Optional:** If the office intends on using the TDO application on the server, then **TDOProfessional124xxx.exe** must be ran again on the server using the below **Workstation(s) Update** steps

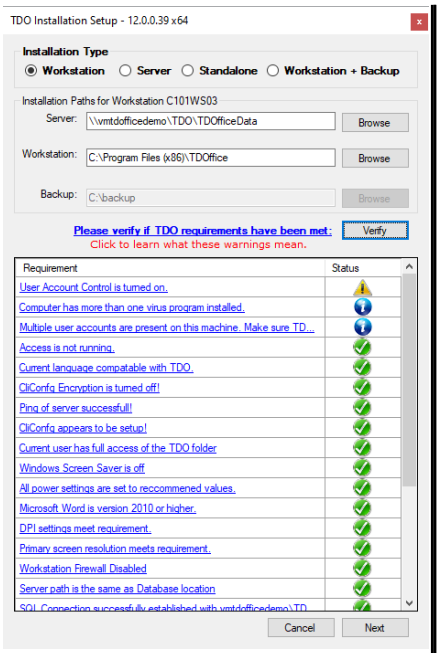
Workstation Update

Now that the server is updated, the workstations can be updated. These steps need to be performed on each workstation. Workstations that are not updated will error stating the workstation database version does not match the server version.

- On the **workstation**, navigate to the **server path** where the

"TDO Builds" folder and installation files are located

- Run **TDOProfessional124xxx.exe** to install the latest TDO build - **must be same version as server**
- Read through the **License Agreement**, if you agree, click **I Agree** to proceed with the install
- Under the **Installation Type** section, select **Workstation**
- In the field **Server**, enter the **UNC path** to the **"TDOfficeData" folder** on the server
- Click **Verify** - this will prompt the installer to check and generate a list of requirements necessary for TDO to run
- Click **Next** to proceed with the installation - if there are any **red X marks**, the **Next** button will remain greyed out and unclickable until they are cleared
- Once the process is complete, the window will read **"Installation completed!"**
- Repeat "Workstation Update" steps on all remaining workstations



Troubleshooting

Reference the following linked article when troubleshooting TDO installations: TDO installation - troubleshooting.

Online URL: https://kb.tdo4endo.com/article.php?id=879