[v12] Right-Click options

939 TDOKB1 February 24, 2026 New User resources, TDO software 6.16K

Overview

The available right-click options vary depending on the field being clicked on - not all fields have options available. Right-click options can include value lookup, customizing dropdown lists, and query searches.

Table of Contents

- Lookup Value
- Edit List
    - Standard Value vs. My Custom Value
- Adding a new option to list using My Custom Value
- Edit name of Standard Value using My Custom Value
- Deleting listed Values using Remove
- Reorder List
- Copy a list option
- Refresh List
- View Cases for Current Value
- View Cases for Specified Values

Lookup Value

This option allows you to search for a singular patient based on the field that was right-clicked on (i.e. Patient ID, Chart Number, etc.).

- Right-click on the **dropdown** arrow. If **Lookup Value** is an available option, proceed with the following steps
- Selecting **Lookup Value** will open a pop-up window similar to the example below

Example: This screenshot is from the Patient **ID** field on the **Patient page**.



- In the blank box, begin typing what you are looking for

Example: Type in the patient's ID number, this will highlight the patient with a black bar



- **Option 1:** Clicking on any patient listed in the dropdown will automatically open up that Patient's Page
- **Option 2:** If the desired patient is highlighted with a black bar, clicking **Enter** on your keyboard will prompt TDO to go to the Patient's Page

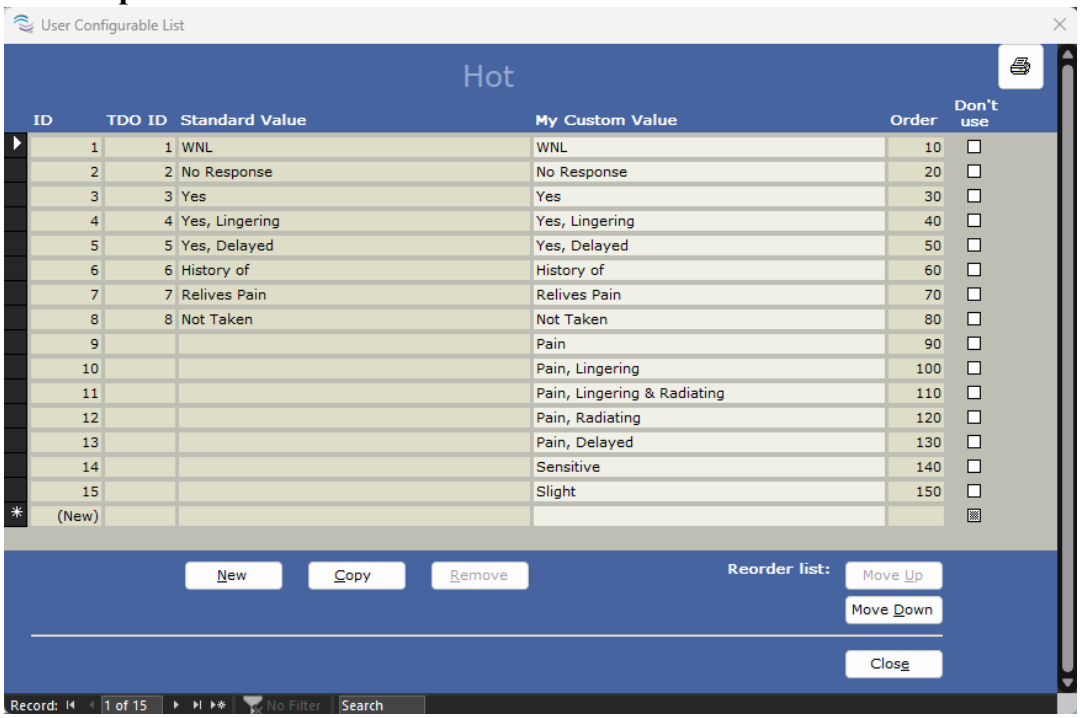
---

Edit List

If this is an available option, then the dropdown list can be customized to your office's specific needs. Available actions include: editing the default option names, adding non-default options, deleting non-default options, hiding options, and reordering the list's contents. If it is not an available option, then the list does not have this function.

- Right-click on the **dropdown** arrow, if **Edit List** is an available option, proceed with the following steps
- Selecting **Edit List** will open a pop-up window similar to the example below, where you can edit the default value names, add non-default values, delete non-default values, hide values, and reorder the list's contents.

Example: This screenshot is from the **Multi Tooth Testing page** and right-clicking on the **Hot** field **dropdown**.



Standard Value vs. My Custom Value

Standard Values are TDO defaults that come with the program and cannot be changed, added, or removed. **My Custom Value** are manually entered non-default values. The above screenshot shows custom values; anything listed in **My Custom Value** from the above screenshot must be added manually using the steps following this.

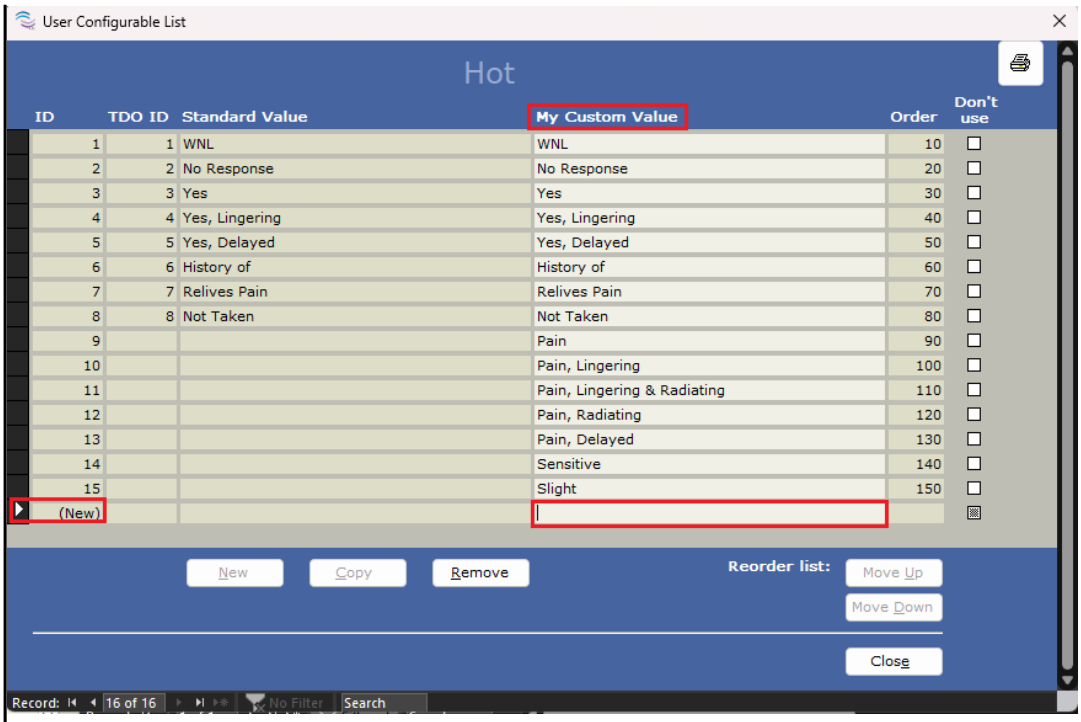
Please beware, many reports and letter tokens use the default **Standard Values,** so it is best not to change the names dramatically.

Adding a new option to list using My Custom Value

Some drop-down lists permit the addition of new values, to do this follow the below steps. If Edit List is not an available option then the list cannot be customized.

- **Right-click on the dropdown arrow and select Edit List. There are two methods of adding a new value**
- **Option 1: Under the My Custom Value column on the last row, type in your new value**

Example: This screenshot is from the Multi Tooth Testing page and right-clicking on the Hot field dropdown.



- **Option 2:** **On the far left of the rows select any black/ grey box (doesn't matter which) - this will make the New and Copy buttons clickable**

Example: This screenshot is from the Multi Tooth Testing page and right-clicking on the Hot field dropdown.



- **Option 2, continued:** **Click New - a new line will appear at the bottom of the list with the text "New Value"**

- **Option 2, continued:** Overwrite the text "New Value" with your desired value

Example: This screenshot is from the Multi Tooth Testing page and right-clicking on the Hot field dropdown.



- To save click Close at the bottom right of the window
- To ensure changes are applied, right-click the same dropdown and select Refresh List

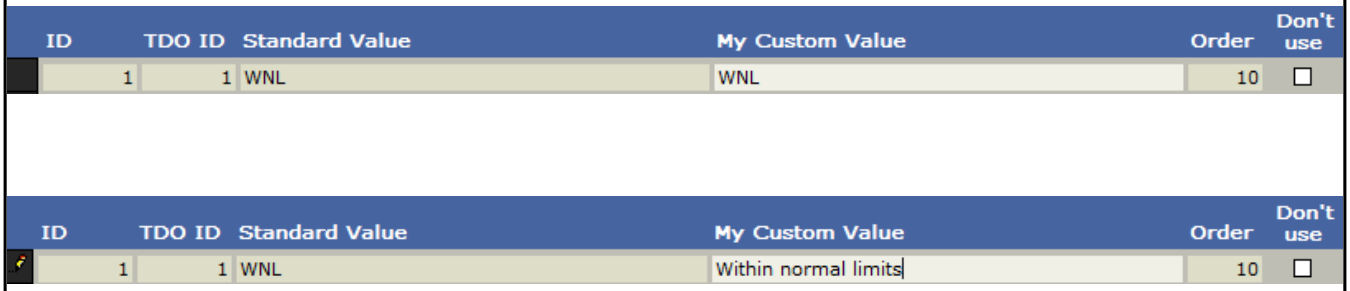
---

Edit name of Standard Value using My Custom Value

Some Standard Values permit the value names to be customized to the office's preference, to do this follow the below steps. If Edit List is not an available option then the list cannot be customized.

- Right-click on the dropdown arrow and select Edit List
- Find the Standard Value that you'd like to change the name for and in the column My Custom Value to it's right, type in the new name
- To save click Close at the bottom right of the window
- To ensure changes are applied, right-click the same dropdown and select Refresh List

Example: This screenshot is from the Multi Tooth Testing page and right-clicking on the Hot field dropdown. The top image shows the default name of "WNL," the bottom image shows My Custom Value of "Within normal limits."



If no Order number is added then the new value will automatically be placed at the top of the dropdown list.

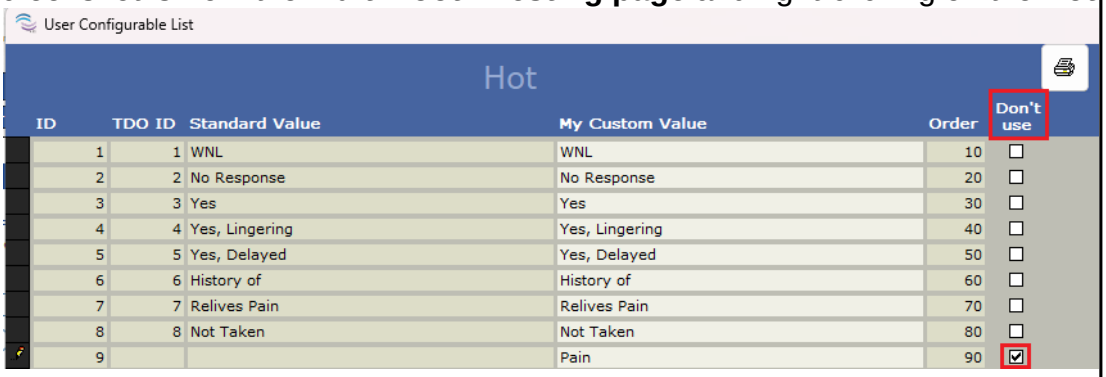
Hiding listed Values using Don't Use

To clean up the list of selectable options you can either hide or delete values as available. If Edit List is

not an available option then the list cannot be customized.

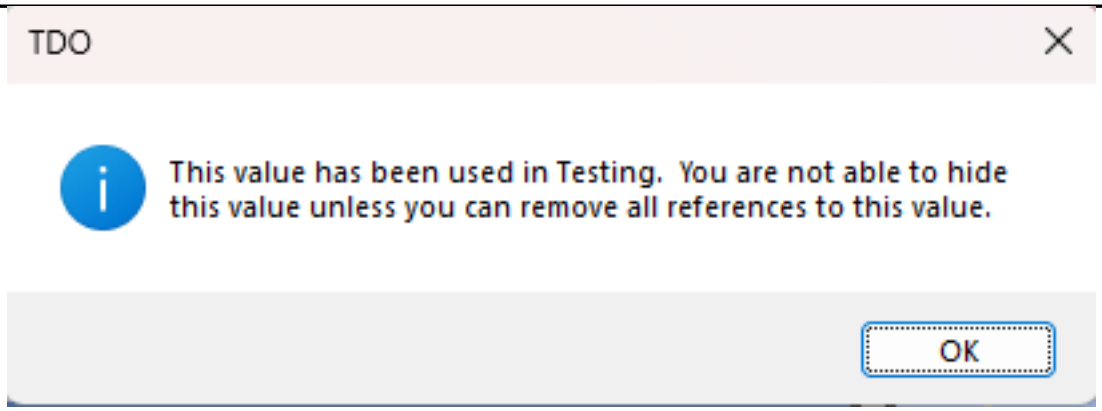
- Right-click on the dropdown arrow and select **Edit List**
- Next to the value you'd like to hide check the box under the column **Don't Use** on the far right of the row
- To save click **Close** at the bottom right of the window
- To ensure changes are applied, right-click the same dropdown and select **Refresh List**

Example: This screenshot is from the **Multi Tooth Testing page** and right-clicking on the **Hot** field **dropdown**.



Notification: In-use value cannot be hidden

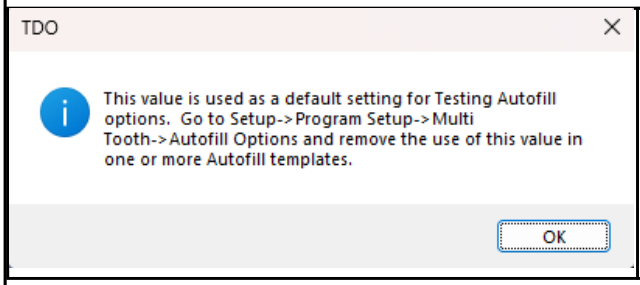
If after checking the box **Don't Use** you get the following notification message that means the value is in use elsewhere and cannot be hidden.



Notification: Autofill value cannot be hidden

If after checking the box **Don't Use** you get the following notification message then the value is in use as an autofill option and cannot be hidden. To remove the value as an autofill option go to **Setup >**

Program Setup > Multi Tooth > Autofill Options > remove value as option > Close to save.



" This value is used as a default setting for Testing Autofill options. Go to Setup-> Program Setup->Multi Tooth->Autofill Options and remove the use of this value in one or more Autofill templates. "

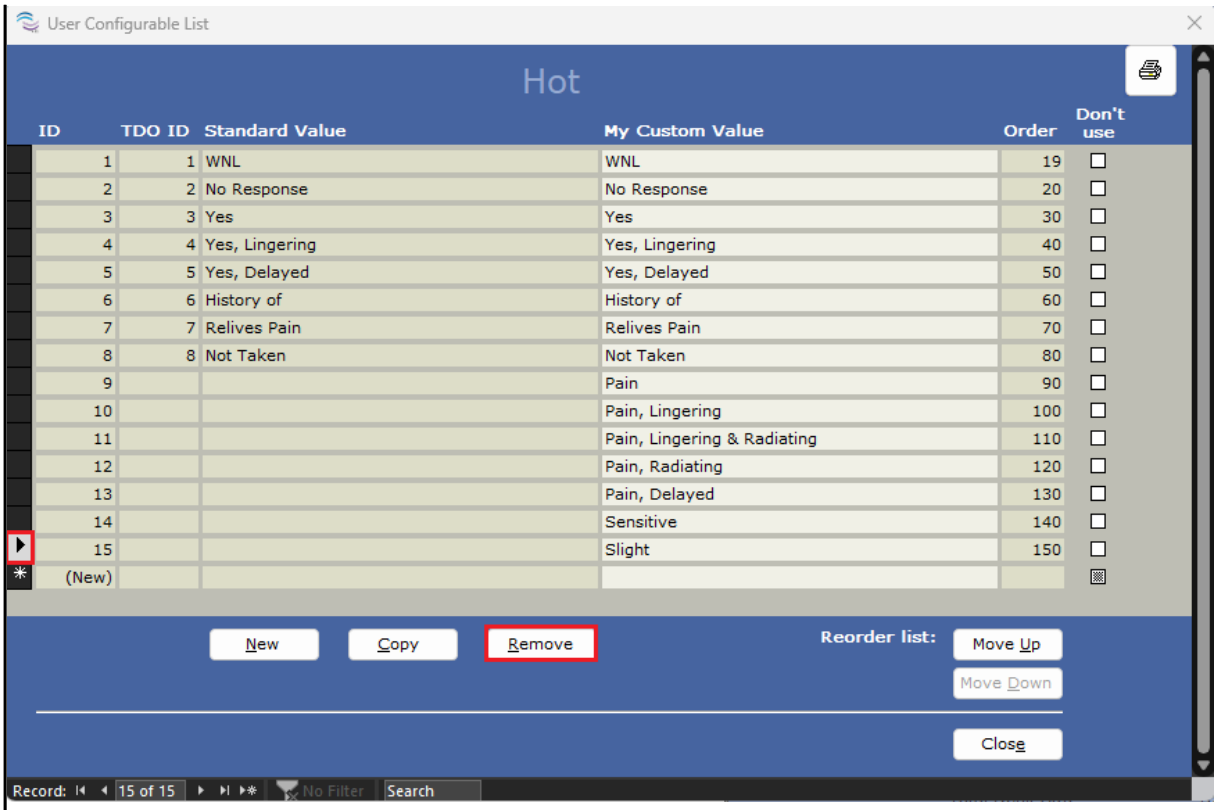
Deleting listed Values using Remove

To clean up the list of selectable options you can either hide or delete values as available. **Standard Values** cannot be deleted. If Edit List is not an available option then the list cannot be customized.

Warning: Deleted values cannot be retrieved once deleted. If a value is mistakenly deleted they will need to be manually reentered under My Custom Values.

- Right-click on the dropdown arrow and select **Edit List**
- On the far left of the rows select the **black/ grey box** corresponding to the value row you'd like to delete
- Click **Remove** to delete the line
- After closing the window, to ensure changes are applied, right-click the same dropdown and select **Refresh List**

Example: This screenshot is from the **Multi Tooth Testing page** and right-clicking on the **Hot** field **dropdown**.



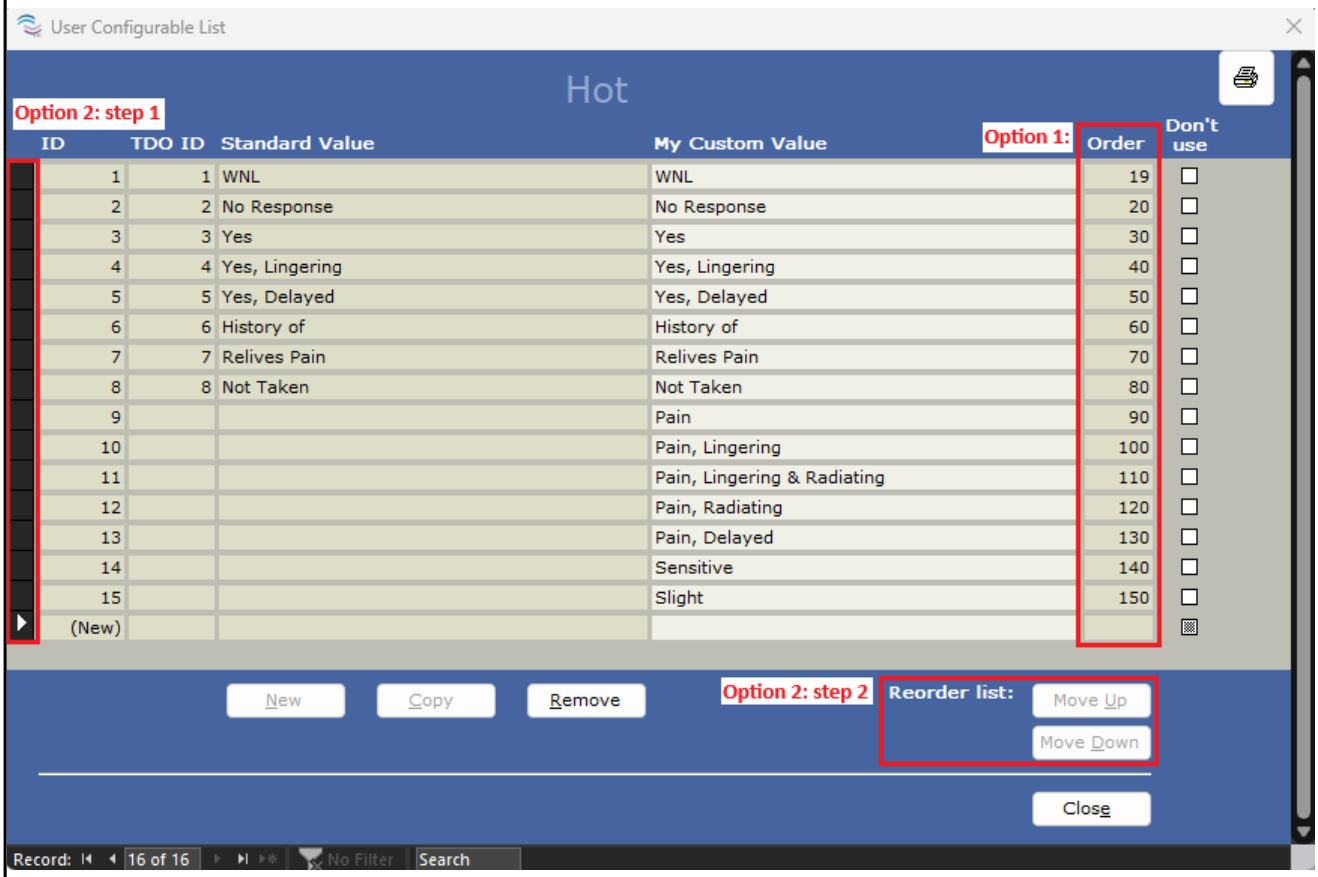
Reorder List

There are two ways to reorder the list values. If Edit List is not an available option then the list cannot be customized.

New Values are automatically placed at the top of the dropdown list unless an Order number is added when or after the value was created.

- Right-click on the dropdown arrow and select **Edit List**
- **Option 1:** Under the **Order** column type in the numerical order that you'd like the values to appear in the list - zero (0) being the top of the list.
- **Option 2:** On the far left of the rows select the **black/ grey box** corresponding to the value row you'd like to move - this will make the **Move Up** and **Move Down** buttons clickable
- **Option 2, continued:** Use the **Move Up** and **Move Down** buttons to rearrange the list
- To save click **Close** at the bottom right of the window
- To ensure changes are applied, right-click the same dropdown and select **Refresh List**

Example: This screenshot is from the **Multi Tooth Testing page,** and right-clicking on the **Hot** field **dropdown**.

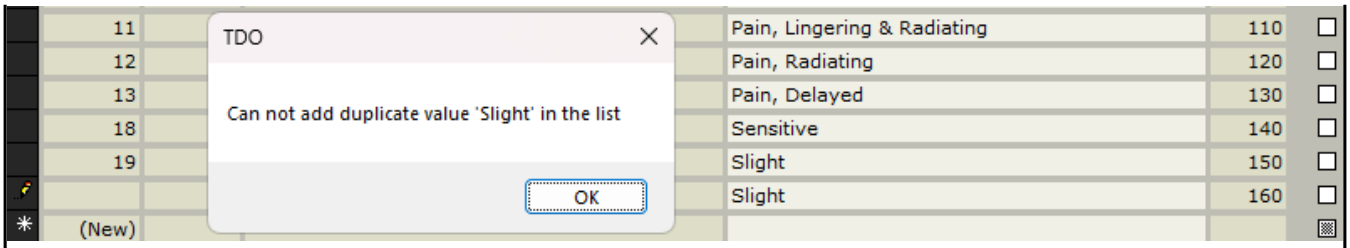


Copy a list option

To duplicate a list option follow the below steps, please note you will need to slightly change the name of the option in order to save. If it is not an available option then the list does not have this function.

- Right-click on the dropdown arrow and select **Edit List**
- On the far left of the rows select the **black/ grey box** corresponding to the value row you'd like to duplicate
- Click **Copy** to duplicate the value
- Under the **My Custom Value** field change the value name slightly to differentiate between the copy and the original. If you try to save without changing the value name it will prompt the below notification and prevent you from saving until all list options have unique names.
- To save click **Close** at the bottom right of the window
- To ensure changes are applied, right-click the same dropdown and select **Refresh List**

Notification: Duplicate Value - list cannot be saved



Example: This screenshot is from the **Multi Tooth Testing page,** and right-clicking on the **Hot** field **dropdown**.



Refresh List

This function is most commonly used after a list has been edited to ensure edits show up. If it is not an available option then the list does not have this function.

- Right-click on the **dropdown** arrow, if **Refresh List** is an available option, click it to reload the list

---

View Cases for Current Value

The **View Cases for Current Value** will show you a list of all cases with that have the currently selected value alongside their patient picture and pre-op and post-op images . From here you can open the notes associated to a case, as well as, open the patient. If it is not an

available option then the list does not have this function.

- Right-click on the dropdown arrow and select **View Cases for Current Value**
- This will open a pop-up window called **Case List,** where you can see a list of the cases and navigate to the case **Notes** pop-out window or the **Patient** page

Example: This screenshot is from the **Patient page** and right-clicking on the **Salutation** field **dropdown**. The value being viewed is all cases with the salutation of "**Ms.**" If there is not a patient picture, pre-op, or post-op then those fields will show up blank. Note how it is showing the same patient multiple times, this is not an error as it is showing the patient has multiple cases/ teeth with that value.



View Cases for Specified Values

Similar to viewing cases for the current value the option to **View Cases for Specified Values** generates a list of cases with more flexibility in regards to what is shown and how it is displayed, either in a case view or report list format. If it is not an available option then the list does not have this function.

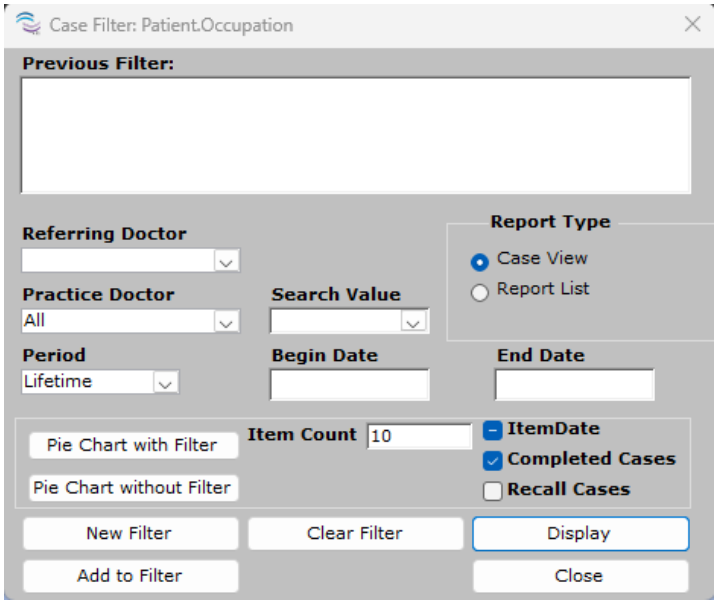
Not all fields have the same capabilities with this function.

- Right-click on the **field** and select **View Cases for Specified Values**
- This will open a pop out window called **Case Filter**
- Select the **Report Type** to view

Case View	This will open up the same window that you get when selecting View Cases for Current Value that will show you a list of all cases with that have the selected value(s) alongside their patient picture and pre-op and post-op images . From here you can open the notes associated to a case, as well as, open the patient. Note how it is showing the same patient multiple times, this is not an error as it is showing the patient has multiple cases/ teeth with that value.
Report View	This will open a PDF list of the Patient names, tooth #, case date, and referring doctor name for the selected value(s).

- The list can be filtered by **Referring Doctor**, **Practice Doctor**, **Search Value**(s), and time **Period**. To add any of these filters select the one you want
- To add any of these filters select the one you want a click **Add to Filter**
- Click **Display** to open the list

Example: This screenshot is from the **Patient page** and right-clicking on the **Occupation** field.



Online URL: https://kb.tdo4endo.com/article.php?id=939