

Creating and Managing Accounts

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Adding Accounts

Every clinic has a Tricefy account - a single account can have many users.

After creating a customer (the person who is responsible for payment), select the **New Account** button on the [customer page](#).

Name the account, select the appropriate country code, Uplink Type, and country code.

 [Learn more about the different versions of Uplink](#)

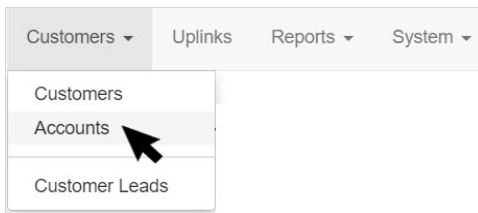
Select **Setup patient link automation** under Account Creation Wizard to automatically configure the account settings to send uploaded images to patients.

 [Learn more about automated patient links](#)

Select **Create Account** to create the account.

Managing Accounts

Accounts are populated on the Accounts screen, which is accessible from the customers menu at the top of the screen:



The Accounts screen lists the Account ID (automatically assigned), Account name, Customer, Data Retention, Onboarding step (built-into the Tricefy software) and number of Uplinks for each account.

Select the hyperlink in the Name column to view or modify information for a specific account:

[Zack Morris](#) | Bayside

Account Details	
Id	132
Customer	Zack Morris
Retain data for	10 years
Storage Options	Standard
Region	eu-west-1
Suspended?	false
Uplinks	0 (view)
Time Zone	UTC
Uplink Type	standard
Current Onboarding Step	Install Uplink
Created At	2017-09-13 20:52:53 UTC
Last Updated	2017-09-13 20:52:53 UTC

[Edit](#) [Change Data Retention](#)

Members

Name	Email	Phone	Admin
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Invitations

Email	Status	Admin
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[Invite new users](#)

Integrations

[Contact Trice staff for integrations](#)

Select **Change Data Retention** to change the duration that data is saved (10 years is the default). After this period of time, the data is deleted.

Inviting new users

Select **Invite New Users** to invite the Account Administrator(s) to their Tricefy account. Make sure to check the **Admin Privileges** checkbox so that they can invite additional members to their account.

After accepting their account invitation (which will arrive via email), account administrators can log into Tricefy to invite additional members.

 [See instructions for sending invitations from the Tricefy account settings](#)

You can refer back to this screen to see if your customer accepted the invitations. Customers who accepted the invitation will be listed under Members:

Members			
Name	Email	Phone	Admin
Slater	Slater@gmail.com		true

If your customer did not accept the invitation, they shown under Invitations with a status of "pending:"

Invitations				
Email	Status	Admin		
dmac@.com	pending	false	resend	remove

[Invite new users](#)

Select **Resend** to email the customer the invitation again.

Statistics

The bottom of the screen displays account statistics summarizing usage per month.

Stats				
Month	Studies	Instances	Storage	Avg Size
2013-08	7	43	267 MB	38.1 MB
2013-10	2	8	895 KB	448 KB
2014-03	1	7	89.5 MB	89.5 MB