

Templates - Name and Categorize your Template

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To get started customizing your template, it is recommended to begin with the Tricefy global template that best fits your needs. Changes to your template are automatically saved.

The template editor should not be used with tablets and mobile devices.

To rename and/or re-categorize your reporting template, select the pencil icon at the top of the screen:

 VASCULAR
 Tricefy Global Template - Carotid Ultrasound A (English, v1)

 container
 row

 empty
 container

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 1234 Main St Suite 1

To change the category - Edit the first field shown below [1]
To change the name - Edit the second field shown below [2]

 Vascular
 Tricefy Global Template - Carotid Ultrasound A (English, v1)

When the category and name are correct, select the black checkmark.

Categories and names are important because they help users pick the appropriate template when creating a report.

You can change a reporting template's name at any time. If you export the report, the output file (.csv) will be named with the current title of the report.