Creating and Managing Accounts

Last Modified on 2025-09-09 07:06

Adding Accounts

Every clinic has a Trice 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

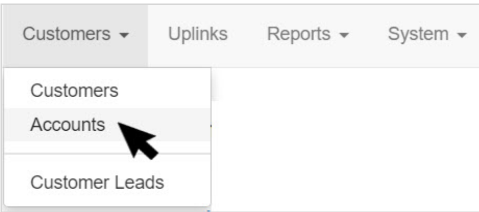
Select **Setup patient link automation** under Account Creation Wizard to automatically configure the account settings to send uploaded images to patients.

Learn more about automated patient links

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

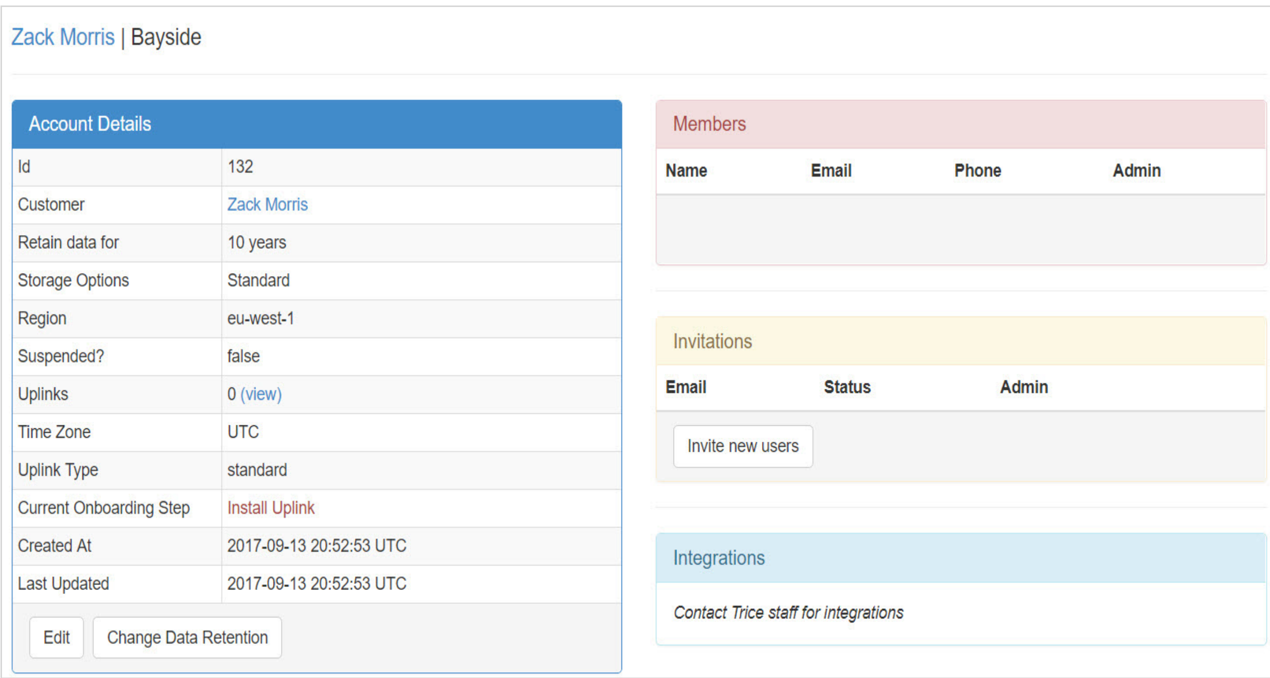
Managing Accounts

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 Trice software) and number of Uplinks for each account.

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



Tricefy

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 Trice 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 Trice 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**