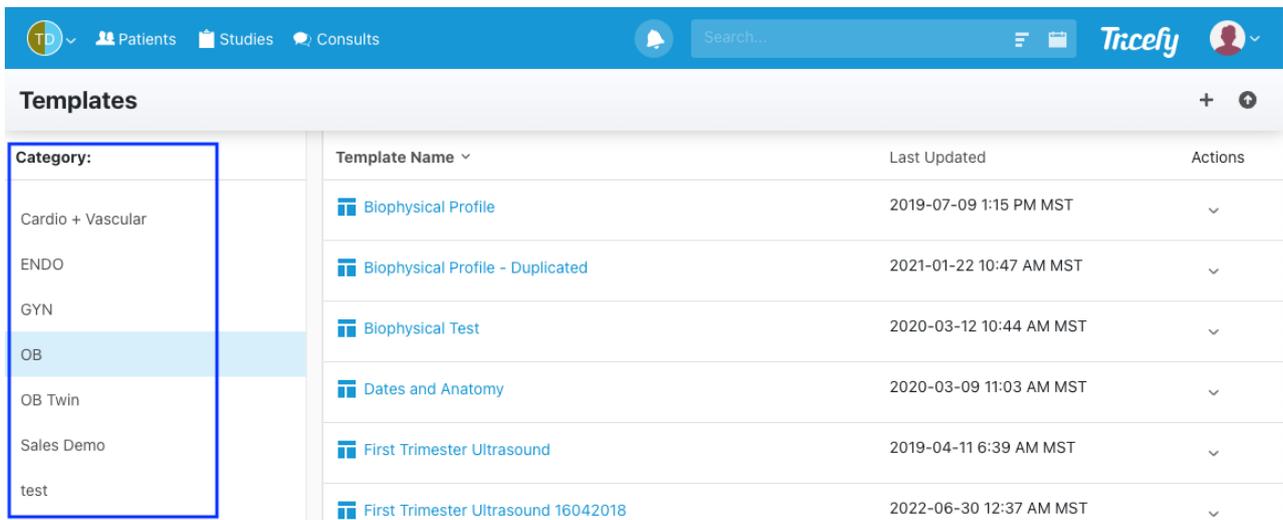
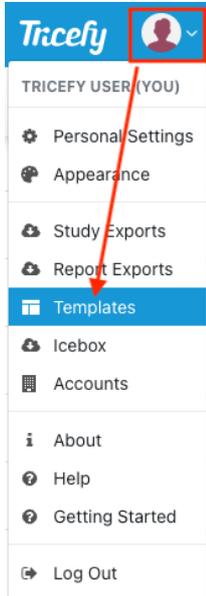


Reporting for Administrators

Last Modified on 2023-09-27 15:49

Clinic Administrators (and those with delegated permissions) have access to Tricefy's global reporting templates by selecting the **Templates** option in the user menu at the top right:



- Select the template **Category** (shown in the blue box - these will vary depending on the categories chosen by the clinic)
 - Next, select the link under the **Title** column to open the template
- Select the drop-down arrow in the **Actions** column to:
 - **Duplicate** - Create a copy of the template
 - **Export** - Locally download the template as a .json file
 - **Archive** - Disable the template from future use (this will not affect current templates)
 - Archived templates will be listed at the end of the category list
 - When an archived template is selected, this option will be replaced with **Unarchive**
 - **Delete** - Remove the template
 - If a template is used for a finalized report, it cannot be deleted (archive the template instead)

Opening a template allows you to change the name, make modifications, remove unnecessary items, and other create other customizations:



[Learn how to name and categorize your template](#)

[Learn how to upload and adjust your logo](#)

[Learn how to add titles and headers](#)

[Learn how to modify headers and labels](#)

[Learn how to add, remove, and modify fields](#)

[Learn how to create and manage Smart Groups](#)

[Learn how to reorganize your template](#)

[Learn how to add a signature field](#)
