

How To: Make a New Updox Account in Partner Portal



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Overview

This article will walk you through making a new account in your Partner Portal.

Instructions

Step 1:

Log in to the Partner Portal for your environment.

NOTE: The link to your environment can be found here: [Partner Portal](#)

Step 2:

Login to Partner Portal.

Login to the Updox Partner Portal

Email address

Password

[Login](#)

[Forgot your password?](#)

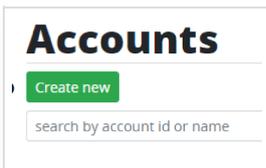
Step 3:

Once you have successfully entered, navigate to **Menu**, then select **Accounts**.



Step 4:

Select the **Create New**.



Step 5:

You will be prompted with a list of empty fields to be filled out.

Create a new account

Please see the [PracticeActions -- PracticeCreate/1_1](#) call on our [Interactive API](#) page for more details.

Account ID

API field: accountId

Account Name

API field: name

Address 1

API field: address1

Address 2

API field: address2

City

API field: city

Country

API field: countryCode

State/Province

Once finished, click **Create**.

NOTE: You will only need to fill out the "Account Name" and "Address" fields *IF* you only intend to create a test account for yourself.

Step 6:

Find your newly created Account and click **Details**.

Here, you can add fax numbers, different products, and users.

The screenshot displays the 'Pat test' account details page. At the top, the breadcrumb 'Accounts / Pat test' is visible. The main heading is 'Pat test', with a sub-heading 'emr_account pattestaccount - created 9 months ago'. The 'Address' section lists '555 Fake street, Columbus, OH 43215 US, 614-555-1234'. The 'Fax numbers' section contains the number '877-331-0195' with 'Add fax number' and 'Check fax number' buttons. The 'Upload a CSV file' section includes a 'Browse...' button and an 'Upload' button. The 'Preferences' section shows 'Reminders Caller ID' as 'not set' with an 'edit' button. A red 'Schedule Account Close' button is also present. The 'Strategy' section shows 'Updox'. The 'Available Modules' section lists 'Reminders - Patient appointment reminders' and 'Broadcast Messaging - Updox broadcast messaging in web app', both with checkboxes.