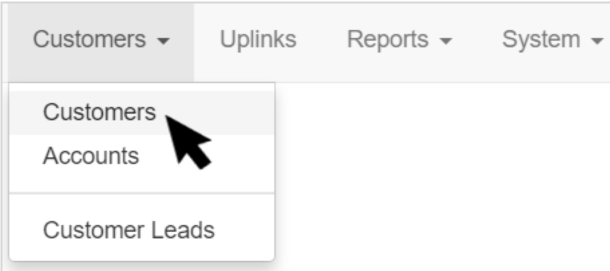
Creating and Managing your Customers

Last Modified on 02/11/2018 10:02 am EST

Adding Customers

To add a new customer, select **Customers** from the customers menu at the top the screen:



On the subsequent screen, select **new customer** and enter the customer information. Once all fields are complete, select **Create Customer**.

Managing Customers

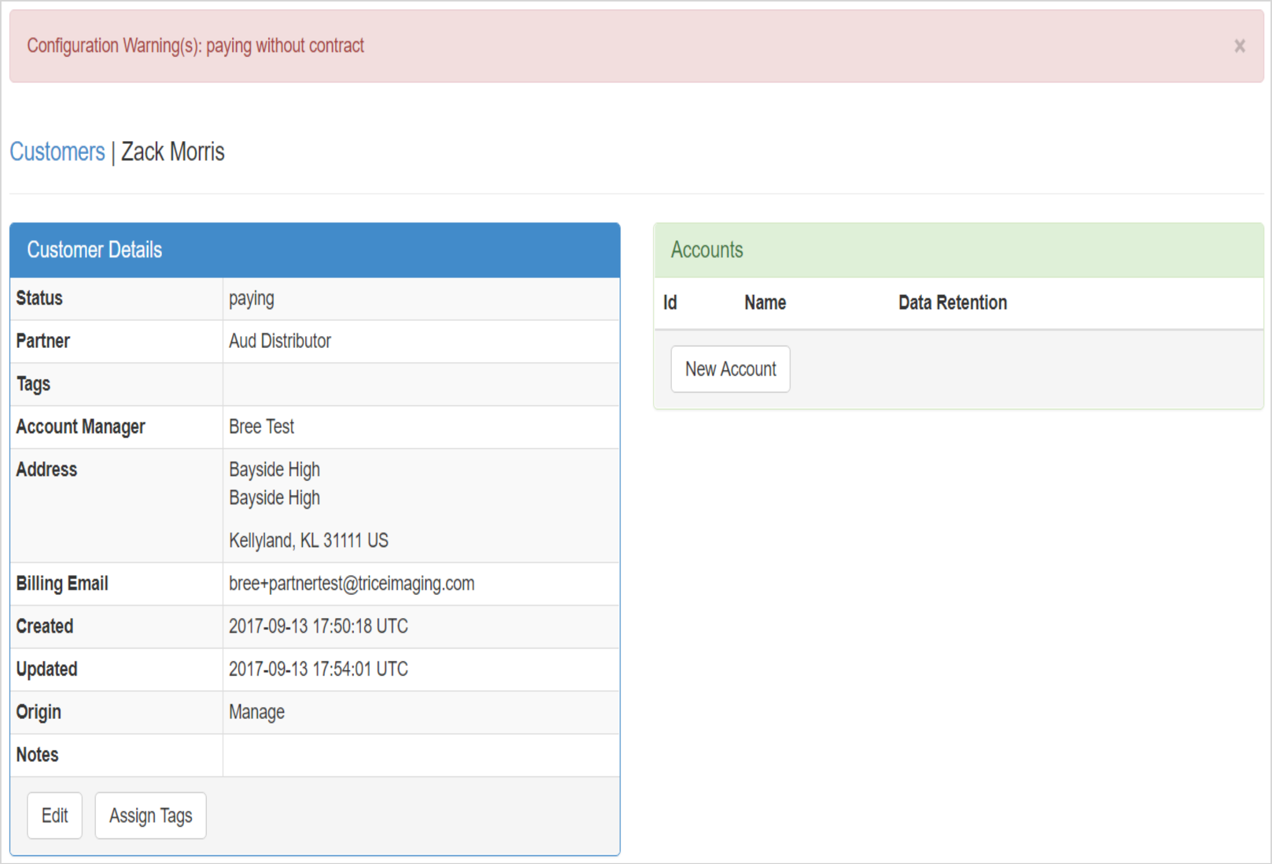
Your customers are populated on the Customers screen:

Id	Name	Status	Origin	Location	Country	Created
159	Hayden Parker	paying	Manage	Why, Arizona	US	2017-09-11
162	Gerald Dean	trial	Manage	Tempe, Arizona	US	2017-09-13
163	Zack Morris	paying	Manage	Kellyland, KL	US	2017-09-13

*Displaying **all 3** customers*

A red customer indicates there is a warning associated with thar customer. To view only customers with warnings, select the **Warnings** checkbox, followed by **Filter**. You can also filter by name, status, and origin (how the customer signed up).

Selecting a customer from the list displays the customer details, such as their address, when the account was created, and any associated warnings:



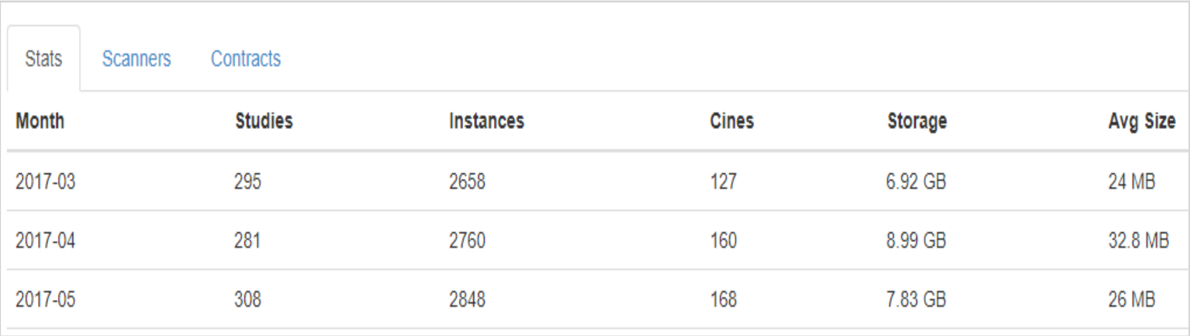
Select **Edit** to modify any of the customer details.

If this is a new customer, select **Add Account** to create the customer's Tricefy account. This is usually the customer's clinic/office.

See instructions for creating and managing accounts

Customer Statistics

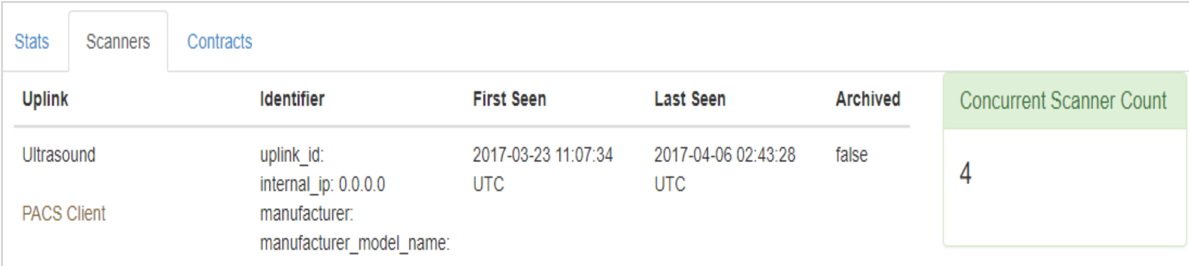
The bottom of the screen displays customer statistics that summarize their usage per month. This is a good way to confirm that new users are sending images successfully:



Month	Studies	Instances	Cines	Storage	Avg Size
2017-03	295	2658	127	6.92 GB	24 MB
2017-04	281	2760	160	8.99 GB	32.8 MB
2017-05	308	2848	168	7.83 GB	26 MB

Scanners

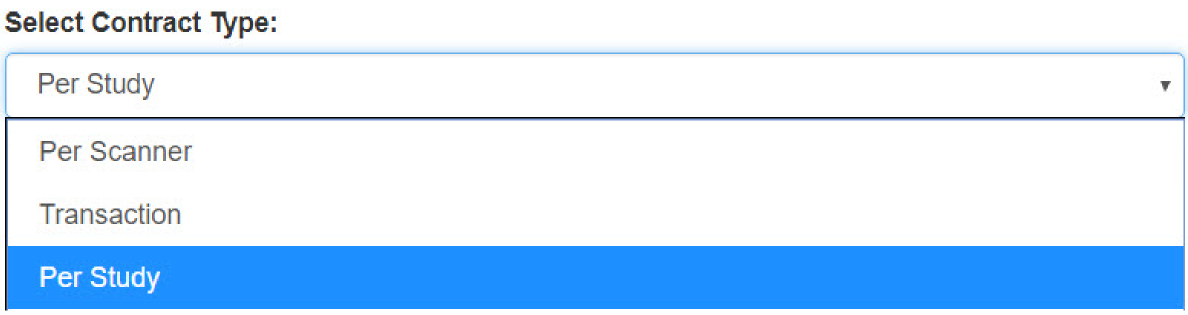
Selecting the Scanners tab at the bottom of the screen displays a list of connected scanners and any information that is available about the scanner, such as the Uplink ID:



Adding or Modifying a Customer Contract

Selecting the Contracts tab at the bottom of the screen displays the customer contract. To modify an existing contract, select the hyperlink in the Contract column.

To add a new contract, select the New Contract button. Specify the type of contract:



- Per Scanner: Payment is determined by the number of scanners
- Per Transaction: Payment is determined by the amount of activity (API calls)
- Per Study: Payment is determined by the number of uploaded studies

Select Next and complete the fields shown on the following page. Uncheck Send Invoices Automatically or Automatically Renew if you do not want these to be automated actions.

When you are finished, select Create Contract.