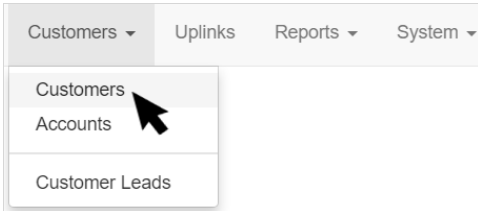


Creating and Managing your Customers

Last Modified on 09/26/2022 5:48 pm EDT

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
search		all	all	<input type="checkbox"/> warnings	Filter Clear	csv xls
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 that 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:

Configuration Warning(s): paying without contract



Customers | Zack Morris

Customer Details	
Status	paying
Partner	Aud Distributor
Tags	
Account Manager	Bree Test
Address	Bayside High Bayside High Kellyland, KL 31111 US
Billing Email	bree+partnertest@triceimaging.com
Created	2017-09-13 17:50:18 UTC
Updated	2017-09-13 17:54:01 UTC
Origin	Manage
Notes	

Accounts		
Id	Name	Data Retention
<input type="button" value="New Account"/>		

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:

Stats	Scanners	Contracts				
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:

Stats	Scanners	Contracts				
Uplink	Identifier	First Seen	Last Seen	Archived	Concurrent Scanner Count	
Ultrasound	uplink_id:	2017-03-23 11:07:34	2017-04-06 02:43:28	false	4	
PACS Client	internal_ip: 0.0.0.0	UTC	UTC			
	manufacturer:					
	manufacturer_model_name:					

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:

Select Contract Type:

Per Study	▼
Per Scanner	
Transaction	
Per Study	

- **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**.
