

30-day free trial: Converting Accounts from Trial to Paying

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At Trice Imaging we have a very high free trial conversion rate. To capture revenue and retain value for our customers, we offer a 30-day free trial period. Please note that distributors may choose to forgo a free trial and start immediately with a paying contract. The choice to offer a free trial is up to the distributor, however that trial is to last no more than 30 days. Trial customers are given full access to Tricefy features for 30 days. After 30 days, the customer will need to be converted from a trial to paying account. Distributors should communicate expectations clearly with trial customers including the duration of the free trial, the value of Tricefy, and the cost.

At the end of the 30-day free trial, the customer will be converted to a paying account by the distributor. If the distributor wishes to make an exception for the customer and extend the free trial beyond 30 days, then the distributor will assume the cost beyond 30 days. Trice Imaging reserves the right to convert all trial customers to paying after the 30-day trial period has finished.

Converting a Customer from Trial to Paying in Manage

From the Customers page (homepage), use the search box to find the customer that needs to be converted from trial to paying.

From the Customer Details box, select **Edit**. This brings up the Editing Customer page.

Customer Details	
Status	Demo
Partner	
Tags	
Account Manager	
Commission Recipient	
Address	Trice Imaging, Inc. 1343 Stratford Court Del Mar, CA 92014 US
Billing Email	adrena@triceimaging.com
Current Storage Usage	1.82 GB
Created	2019-09-03 10:43:29 UTC
Updated	2022-07-27 13:03:01 UTC
Origin	Manage Signup Form
VAT	n/a
Notes	Partner Sales Rep: Trice Sales the date the term. was requested the date the term is effective why they terminated?
<input type="button" value="Edit"/>	

From here use the **Status** drop-down menu to select **Paying-Paying Customer**.

Editing Customer

Name

Adrena Test Account

A short, yet descriptive, name for the customer.

Partner

Account manager

Commission recipient

Status

Trial - new or potential customer

- Demo - permanent demo, not for customers
- Migrating - currently migrating, do not use or change
- Paying - paying customer**
- Terminated - cancelled service, accounts are suspended
- Trial - new or potential customer
- Trial On Hold - trial pending, accounts are suspended

Update Customer

Destroy

Select Update Customer.

Please make sure the contract is correctly entered so that the amount invoiced to the distributor is correct. To edit the contract, please select the **Contracts** tab at the bottom of the Customer Details page, select the contract to review and select **Edit** if needed.