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QuikChek Cloud is the most important piece of equipment in your facility. It will track every single dollar and member that comes into your club. The success of your club will depend upon your knowledge of this software. You will only get out of it what you put into it. LEARN IT to the best of your ability.

Please use this quick start guide as a reference tool to get you up and running quickly. You can use the Demodata account in QuikChek Cloud provided to you to familiarize yourself with the program. You can switch to your actual account when you're ready to use QuikChek Cloud for your facility.

(954) 575-7160 | www.healthclubsoftware.net

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Quick start guide

**DEMO LOGIN:**
*Business Name: demodata*
*User Name: james*
*Password: software*

Standard installation instructions for QC Cloud on any computer or Chromebook.

1. Please go to <https://www.google.com/chrome/> and download and install Google Chrome.
2. Please add a bookmark to the Bookmarks bar [https://qccloud.net](https://qccloud.net/) . Make sure it has **https** at the beginning, also make sure it doesn't have **/account/login** at the end.
3. Please go to Chrome Settings (Click the 3 dots on the upper-right of Chrome and click Settings). Go to the following:
	* 1. **Payment Methods** set to **Off**. You do not want Google storing credit card information of your members or employees.
		2. **Addresses and More** set to **Off**. You do not want Google storing every name and address of your members.
		3. **Advanced >> Site Settings >> Pop ups and Redirects >>** Add qccloud.net to the Allow list
		4. **Passwords>>** **Turn off Offer to save passwords** so Google doesn't store personal passwords of every employee. This applies to computers used by multiple employees.
4. On **Check-in computer** only. Download and install the Check-in Application 14-1 at <https://healthclubsoftware.net/> Go to Support >> Tech Support

Members and Member information

**How to Add Member**

1. Click 'Members' top of screen.
2. Click the 'Add New Member' button on left pane
3. Enter member information, then select a Group and membership type
4. Click Save

**How to Link an Add-on to a Main Member**

1. Use Add New Member button to enter the Add-on name and info
2. Save
3. Enter the Main Members Member Number in the Main Member Member Number field
4. Click Save

**How to link a Member to Silver Sneakers, Silver Fit, or Optum insurance**

1. While viewing the members record, Click More Info on the left
2. Click Medical Info on the submenu at the top
3. Place a check mark in the correct insurance program on the right
4. Enter the members program ID number in the Insurance ID # field
5. Click Save

**How to link a Member to a Corporation**

1. While viewing the members record enter the Member number for the Corporation in the Corp. Member Number field
2. Click Save

**How to add Notes to a Member record**

1. While viewing the members record
2. Click Notes on the left
3. Click Add New
4. Notes can be deleted on the right if the user has the proper security

Memberships and Billing Contracts

**How to Add a Paid in Full Membership**

1. Click 'Membership Info' on the left pane.
2. Click the 'Add New' button.
3. Select a template from the drop down menu if your club uses templates, then click Save and you’re done. Otherwise, just click Next-Do Not Use Template.
4. Select the Activity
5. Enter the required information and select Paid in Full as the Payment Type.
6. Click ‘Save’.
7. (You cannot use Autorenew with Paid in Full contracts or the member would have a free lifetime membership)

**How to Add a Complimentary Membership**

1. Click 'Membership Info' on the left pane.
2. Click the 'Add New' button.
3. Select a template from the drop down menu if your club uses templates, then click Save and you’re done. Otherwise, just click Next-Do Not Use Template.
4. Select the Activity
5. Enter the required information and select Complimentary as the Payment Type.
6. Click ‘Save’.
7. (You cannot use Autorenew with Complimentary contracts or the member would have a free lifetime membership)

**How to Add a Personal Training or Punchcard Membership**

1. Click 'Membership Info' on the left pane.
2. Click the 'Add New' button.
3. Select a template from the drop down menu if your club uses templates, then click Save and you’re done. Otherwise, just click Next-Do Not Use Template.
4. Select the correct countdown Activity
5. Enter the required information and select Billing Required(or EFT) as the Payment Type.
6. Enter the number of visits the member is buying in the Visits field
7. Click the ‘Save’ button

The visits will automatically countdown each time the member checks in

**How to Add a Billing Membership, EFT, Credit Card, Check Draft or Invoice**

1. Click 'Membership Info' on the left pane.
2. Click the 'Add New' button.
3. Select a template from the drop down menu if your club uses templates, then click Save and you’re done. Otherwise, just click Next-Do Not Use Template.
4. Select the Activity
5. Enter the required information and select Billing Required(or EFT) as the Payment Type.
6. Click the ‘Save and Next’ button
7. The Wizard will take you to the Add Account screen next
8. If credit card is being used, select Credit Card as the Payment Method then click Save and Next
9. If check draft is being used, select Check as the Payment Method
10. Then select the correct bank from the Bank Name dropdown
11. Then enter the checking account number
12. If invoice is being used, select Invoice as the Payment Method then click Save and Next
13. Fill out the billing information screen, select an Account on the right
14. Check mark Autorenew if it’s an Autorenew contract
15. Save

**How to Cancel a Membership**

1. Click ‘Membership Info’ on the left pane of the member’s record.
2. Select the membership you want to cancel
3. Change the Status to Cancelled under Membership Details(bottom half of screen)
4. Save

 Cancelled memberships cannot be changed back to active memberships

**How to Expire a Membership**

1. All Paid in Full memberships will auto expire on the membership end date
2. If you want to manually expire a membership, Click ‘Membership Info’ on the left pane of the member’s record.
3. Select the membership you want to expire
4. Change the Status to Expired under Membership Details(bottom half of screen)
5. Save

**The ONLY Contract Statuses that bill are New or Renewal. All other Statuses will stop the contract from billing any membership dues.**

**How to Add a Billing Contract without adding a new membership**

1. While viewing the members record
2. Click 'Membership Info' on the left pane.
3. Click 'Billing Info' top of screen
4. Select a template from the drop down menu if your club uses templates, fill in the First Bill Date, select the Account to bill, click Save and you’re done.
5. Otherwise, click Next-Do Not Use Template.
6. Enter the required information.
7. Click Save.

Membership Setup

**How to setup Templates**

1. Click Setup at the top
2. Click Membership on the left
3. Click Templates across the top
4. Click Add New.
5. Give the Template a name Example: “1yr Indiv Paid in Full”
6. Fill in the fields with the default values that you would like to show up when that template is used
7. Click Save

Not: Templates speed up the data entry process. If you select a template, it will populate all of the fields with values that are required and allow the user to just click Save. Some users like to create templates for every membership they have, other users like to create a few important templates then they will modify the screen as they are doing data entry if only a small change is needed. Like changing a Payment rate if it’s the only field that needs to be changed.

**How to setup Default Emails to send to individual members**

1. Click Setup at the top, click Membership on the left
2. Click Emails at the top
3. You can modify existing entries or click Add New on the right
4. Setup the email with the default paragraphing you want
5. If you want the email to begin with Dear Steve(member name), type Dear then click the First Name button at the bottom…you will see Dear {{record.first\_name}} When that email is sent it will be sent as Dear and the members first name. Example: Dear Steve
6. You can also use mail merge fields for staff or club info on the sign off at the bottom

Billing Accounts and House Accounts

**How to Add an Account**

1. While viewing the members record, Click Accounts on the left
2. Click ‘Add New’.
3. If the Payment Method is Credit Card

Select Credit Card as the Payment Method, Click Save

Then click Add Credit Card info on the right, it will pull up a window where you can enter the members credit card info and generate a token that represents the members credit card #.

1. Click ‘Save’
2. If the Payment Method is Checking

Select Check Card as the Payment Method, then select the correct bank from the Bank Name dropdown menu. Then enter the checking account number.

1. Click Save
2. If invoice is being used, select Invoice as the Payment Method then click Save.

**How to Add a House Account**

1. While viewing the members record, Click Accounts on the left
2. Click Add New
3. Change the Account name to House Account
4. Select the Payment Method – fill in the appropriate fields
5. Put a check mark at the bottom in Allow POS Charges

The member can then charge products and services to this account in the POS system.

**How to manually create a transaction or adjust an Account Balance**

1. While viewing the members record, Click Accounts on the left
2. Click View Payment History at the top
3. Select the Account you to make an adjustment on
4. Click New Transaction on the right
5. Enter a Description, then enter an Amount, select Credit or Debit, click Save

**How to Deactivate an Account**

1. While viewing the members record, Click Accounts on the left
2. Select the Account you want to deactivate
3. Remove the Active Check mark at the bottom
4. Click Save

**Please Note: An Inactive Account will not process any billing**

**How to view a members Account Balance**

1. While viewing the members record, Click Accounts on the left
2. Click View Payment History at the top
3. Select the Account you want to view the payment history for, it will be displayed below
4. You can also see a members Account Balance on the Member Details screen on the right underneath the Member Photo
5. You can also see a members Account Balance on the Check-in Screen on the right underneath the Member Photo

**How to print a members’ transaction history**

1. While viewing the members record, Click Accounts on the left
2. Click View Payment History at the top
3. Select the Account you want to print
4. Click Print on the right and enter the date range of transactions that you would like to print

**How to Change/Replace a Credit Card on a members’ account**

1. While viewing the members record, Click Accounts on the left
2. Select the credit card account you want to update
3. Click Delete Credit Card info on the right, that will remove the current credit card token linked to the account.
4. Click Add Credit Card info on the right to add a new card to the account

**How to add a New Bank**

 **Option 1**

1. While viewing the members record, Click Accounts on the left
2. Click Add New Bank
3. Enter the new bank info and save

**Option 2**

1. Go to Setup >> Membership >> Banks
2. Click Add New Bank
3. Enter the new bank info and save

**How to view Account Balances for all members**

1. Go to Reports
2. Click Account Balances on the left
3. This screen will display a list of all members accounts, the current balance, and the number of days past due
4. Use the filters at the top of the screen to view a specific group of members

**How to Print a Statement**

1. While viewing the Account Balances screen
2. Click Deselect All and place check marks in the members that you want to print statements for
3. Click the Statements button at the top
4. It will prompt you for the Due Date that you want to appear on the statement
5. The Balance Forward as of Date is the date from which you want to see transactions listed on the statement. Backdate it to last month if you want to see all of the transactions that occurred over the last month.

**How to add Late Fees**

**How to process billing**

Point of Sale Module

**How to Ring Up a Sale**

1. Click POS at the top of the screen, find the member

Note: If you’re ringing up a water or something simple you can use the Default Member for the transaction

1. Select the Category that the product or service is in
2. Select the item you are selling; it will populate the shopping cart on the right, add more items if necessary
	1. Click ‘Apply Discount’ if you wish to give a discount, click ‘Pay Now’ and select a payment method.
	2. Click ‘Memo’ if you wish to add a note to the sale.
3. Click Pay Now and select a payment method.
4. On the final screen you can Print or Email a receipt
5. When you print a receipt it will pop open the cash drawer
6. If you use Exact Change, meaning the member gave you $1.00 for a $1.00 purchase, you can click Open Drawer to open the cash drawer. It will pop up a blank receipt screen. Click Print and your cash drawer will open.
7. Click Done to complete the transaction

**How to process a Refund**

1. On the POS screen, First FIND the member’s name that was used for the transaction
2. Click ‘Refund/Find Receipt’ on the left
3. Find the transaction and click 'Show Receipt' on the right
4. Click ‘Refund Now’, enter any non-refundable amount if any
5. Click Refund
6. Select the original payment method of the transaction. You will then have the option to email or print the receipt.
7. Click ‘Done’ to complete the transaction.

**How to Reconcile your drawer**

1. Each employee must reconcile their drawer after their shift has ended
2. On the POS screen (you can use any member for this, or use Default Member)
3. Click Toolbox on the left
4. Click Reconcile Drawer on the right
5. Enter your cash drawer start amount
6. Click Get Totals to see how much money and checks should be in the cash drawer
7. Enter the actual totals in the center column, you will see how much your drawer if off in the Difference column. Then click print to print a receipt of your totals for the day.

**How to make a Payment on Account**

1. View the member on the POS screen
2. Click Account Payment on the left
3. Select the account that the member is making a payment towards.
4. The payment amount on the right will always default to the balance on the account.
5. If the member is not paying off the full balance or if the balance is zero, click once on the Amount on the right and it will change to an editable field. Enter the amount being paid then press enter.
6. Select how the member is paying and complete the transaction.

POS Setup

**How to setup POS Categories**

1. Click Setup at the top, click POS on the left
2. Click Categories
3. Click Add New
4. Enter the Category name Example: Clothing or Supplements or Pool Memberships
5. Save

**How to setup POS Items/Products/Services**

1. Click Setup at the top, click POS on the left
2. Click Items
3. Select the Category that you want to add an item to
4. Click Add New on the right

 Check-in Module

**How to Check-in a Member**

**How to View Todays attendance**

**How to use the Hold Bin**

**How to take a member picture**

Scheduler Module

**How to book an Appointment**

**How to change an Appointment**

**How to print of list of today’s appointments**

**How to Cancel an Appointment**

Reports Module

**How to Review Billing Reports**

1. Click ‘Reports’ at the top
2. Click ‘Billing’
3. Click ‘Projected Billing’.
4. Enter the date of the billing cycle
5. Click Show Member Names at the bottom
6. Click Preview to see a list of all members that are going to be billed on the date you entered

**How to View Daily Check-ins**

1. Click the ‘Check-in’ tab.
2. Click ‘Todays Check-ins’ on the left pane.

**How to View the Busy Times at the Club**

1. Click the ‘Reports’ tab
2. Click Checkin under ‘Admin Reports’.
3. Click the ‘Hourly Attendance Report’.
4. Enter Start and End Dates and select the activities.
5. Click ‘Preview’.

**How to View Point of Sale Report**

1. To view POS Totals, click the ‘Point of Sale’ under Reports.
2. Click ‘POS Income’.
3. Enter the information required to preview.
4. Click ‘Preview’

To view the details of the Pont-of-Sale, Click the POS Details and do steps 3 & 4

**How to View the New Members of the Month**

1. Click the ‘Reports’ tab.
2. Click ‘Memberships’.
3. New Memberships by Start Date
4. Enter the information required to preview.
5. Click ‘Preview’.