



# Quick Start Guide

This Quick Start Guide will walk you through all the steps necessary to get check-in up and running for the first time. More help and information can be found in our KidCheck Tutorials and Frequently Asked Questions areas, found at [www.kidcheck.com/support](http://www.kidcheck.com/support).

If you have any questions, KidCheck Support is ready to help!  
Contact us at [support@kidcheck.com](mailto:support@kidcheck.com) or (208) 538-2000.

- Step 1:** Campuses & Locations
- Step 2:** Templates & Programs
- Step 3:** Install the KidCheck Client
- Step 4:** License Your Check-in Stations
- Step 5:** Start Check-in
- Step 6:** KidCheck Settings
- Step 7:** Manage Your Subscription
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**Note:**

The online (and most up-to-date version) of this guide can be found at:  
[www.kidcheck.com/support/quickstartguide](http://www.kidcheck.com/support/quickstartguide)

## Step 1: Campuses and Locations

### What is a Campus?

A campus is a single campus or facility that your members may bring their children to.

### What is a Location?

A location is a place within a campus that guardians can check their kids in and out of. This can be a classroom, a class name, etc. Example of a location may be "Nursery (Room 102)" or "First Grade Boys", etc.

## Creating a Location

Select **System Settings** gear icon upper right corner, then click **System Options** item in the left sidebar. In **Campuses & Locations** area, click your listed campus.

The screenshot shows the KidCheck web application interface. At the top, there is a navigation bar with links: Home, My Account, People, Check-in, Billing, Event Registration, Reports, and Help. Below this is a header for 'Campuses & Locations' with a sub-header 'Manage your facility setup in KidCheck to enable fast and accurate check-in.' On the left side, there is a sidebar menu with options: Your Account, System Options, System Setup Wizard, Campuses & Locations (highlighted), ExpressHub, Program Options, Check-in Options, Billing Options, Printing Options, Integration Options, and User Manager. The main content area displays a table with columns: Campus, Phone, and Location. The table contains one entry: 'Demo KidCheck Campus (ID: 9636)' with phone number '(208) 538-2000' and location 'Boise, ID'. Below the table, there is a text box explaining that campuses are physical locations where check-in is run, and locations are specific areas within a campus where check-in can occur.

Campus	Phone	Location
Demo KidCheck Campus (ID: 9636)	(208) 538-2000	Boise, ID

From here you will choose the **Add New Location or Age Group** button. You will create a master library of all locations to be used at your campus. Even if the locations are used at different times throughout the week, add them all in here. They will be divided into templates/programs later.

The screenshot shows the 'Campuses & Locations' management page in KidCheck. At the top, there is a navigation bar with links for Home, My Account, People, Check-in, Billing, Event Registration, Reports, and Help. Below this, the page title 'Campuses & Locations' is displayed with a sub-header 'Manage your facility setup in KidCheck to enable fast and accurate check-in.' A 'Back to Campus List' button is visible on the left. The main content area is divided into several sections: 'Page Options' with links for 'Edit this Campus', 'New Location / Age Group', and 'Add Locations to a Template'; 'Check-in Locations Within This Campus' with a sub-header 'Selected Campus: Demo KidCheck Campus' and explanatory text; 'Your Account' and 'System Options' dropdown menus; 'Your Locations at this Campus:' which includes a table of location groups (None) with entries for 1st Grade, 2nd Grade, 3rd Grade, 4th Grade, 5th Grade, Nursery (0-3yrs), and Toddler & Preschool (4-6yrs); and 'Your Location Groups at this Campus:' which includes a table with 'Location Groups' and 'Remove Grouping' options. A blue arrow points from the location groups table to the 'Remove Grouping' option.

The amount of detail you include in choosing your location names is very important, both in terms of making check-in seamless for parents, and for the accuracy of your attendance reports. **Be sure to read through our tutorial "Template and Location Set-up Tips"**.

If you want guardians to select where they will be while their child is checked in, you can create your master list of guardian check-in locations as well. Click the **Add New Location or Age Group button** and be sure to change the location type to "Guardian Check-in Location".

# Step 2: Templates & Programs

## What is a check-in template?

A template is used to set which check-in locations to make available during a certain activity or service. If you are a church, you'll want to create a separate check-in template for each service and youth program you offer. If you are a school, activity center, fitness center or daycare, you may have just a single check-in template, or a different template for each youth program you offer. Best practices and suggestions for setting up templates and locations to improve tracking and reporting are in the tutorials section on our website.

## What is a check-in program?

(Available on Plus Edition and above.) A check-in program allows you to set up a sequential order for your templates to automatically follow. A church with two Sunday morning services would create a template for each service, and then create a "Sunday Morning Program" that would switch automatically between the two templates at time you specify. This also allows parents to check children into multiple services with just one visit to the check-in station.

## 1. Creating a Check-in Template

Under the **Check-In** tab, click on **Add a New Template** (on the left). Give your new template a name, description and choose the campus this template will be used for. Once you are done, click on **Save Changes** at the top right corner.

Next, you'll assign which locations should be used for this template. To add a location to a template, click the arrow next to a location to move it into the **Locations to Open For Check-in** column. If you've set up your system to track guardian locations, you can also add those locations to the template via the "Guardian Check-in Locations" tab in this area. Once you are finished adding locations, click the **Save Changes** button at the top of the page.

Available Locations:		Locations To Open For Check-In:	
Location Name		Location Name	
1st Grade	→	No Check-in Locations Added	
2nd Grade	→		
3rd Grade	→		
4th Grade	→		

## 2. Creating a Check-in Program

*Note: Programs are available on Plus and Premier editions.* Programs are a helpful tool when you need a sequence of templates on the same day. Refer to "What is a Check-In Program?" box above to understand how programs are used in KidCheck.

Under your **Check-in** tab, click on the **Programs** tab. Then, on the left, select the **Add a New Program** link. Choose a name for your program (such as "Sunday Morning Services", "Weekday Preschool & After School Activities", etc), choose the campus where this program will be used, and then click **Save Changes**.

Next, select the templates you'd like your program to include. To add templates to your program, click the arrow next to the appropriate templates to add them to the "Template Sequence to Run" column. Then, assign each template a start time (the time of day you'd like check-in for that template to begin). Keep in mind each template must have a different start time. Last, add any "Check-In Closed" times (if necessary). Click **Save Changes** when done to create your check-in program.

Template Sequence to Run			
Selected Templates	Start Time		
1st Service	9:00 AM	⊕	✕
2nd Service	10:00 AM	⊖	✕
3rd Service	11:00 AM	⊖	✕

Starting at 9 am, parents can check-in to any of the day's templates.

When a new start time is reached, previous templates are no longer available for check-in.

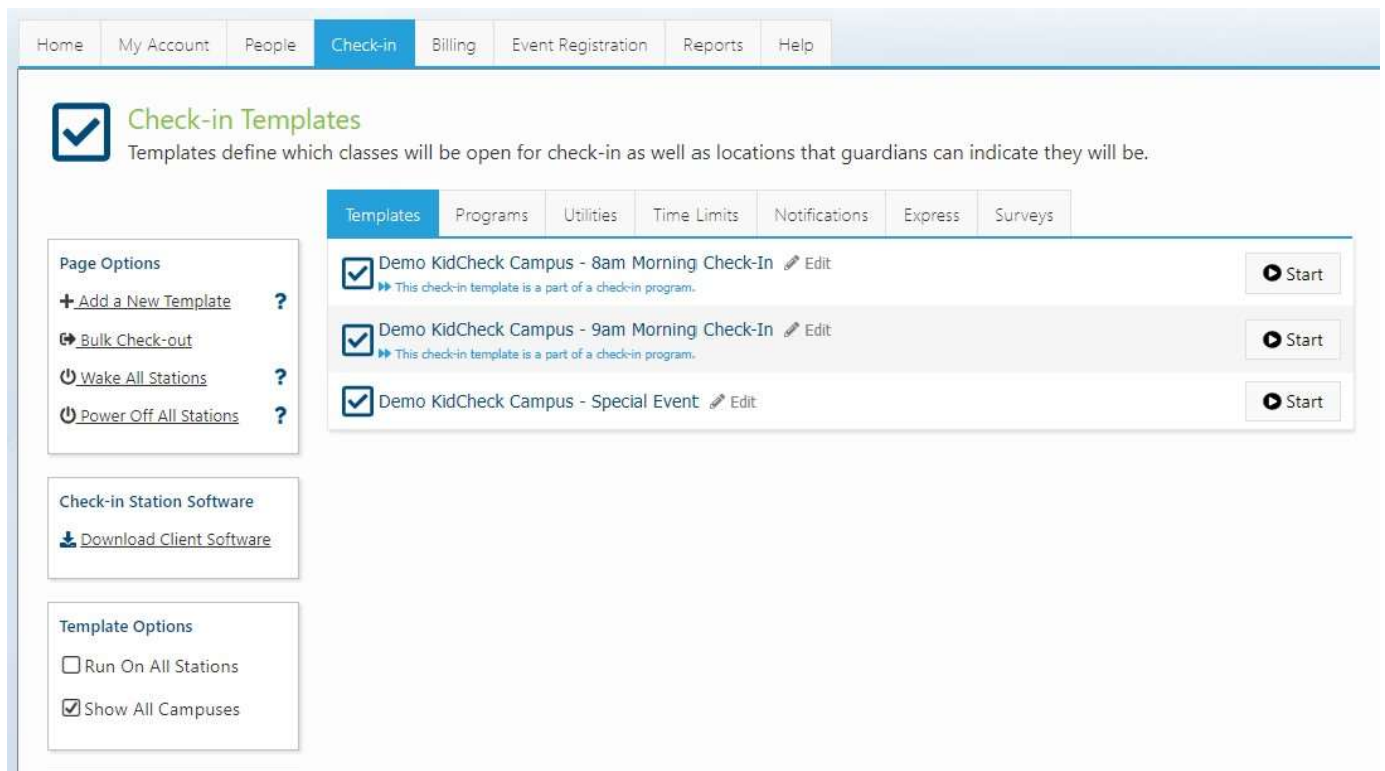
## Step 3: Install the KidCheck Client

KidCheck is a web-based check-in system, which allows you (a KidCheck administrator) to manage your KidCheck account from any computer with internet access. Simple and convenient.

This is one extra step you'll need to complete on **just your check-in station computer(s)**: Installing the KidCheck Client. The KidCheck Client is a small piece of software that allows check-in to run and labels to print.

### To download and install the KidCheck Client:

1. Sign in to your KidCheck account.
2. Click on the **"Check-In"** tab.
3. On the left sidebar, click **"Download Client Software"**.
4. Click **"Download Client Software"** under Page Options.



The screenshot displays the KidCheck web application interface. At the top, a navigation bar includes tabs for Home, My Account, People, Check-in (selected), Billing, Event Registration, Reports, and Help. Below the navigation bar, the main content area is titled "Check-in Templates" and includes a sub-header: "Templates define which classes will be open for check-in as well as locations that guardians can indicate they will be." A secondary navigation bar within the content area includes tabs for Templates (selected), Programs, Utilities, Time Limits, Notifications, Express, and Surveys. The main content area lists three templates, each with a checked checkbox, a title, an "Edit" link, and a "Start" button. The templates are: "Demo KidCheck Campus - 8am Morning Check-In", "Demo KidCheck Campus - 9am Morning Check-In", and "Demo KidCheck Campus - Special Event". The left sidebar contains three sections: "Page Options" with links for "Add a New Template", "Bulk Check-out", "Wake All Stations", and "Power Off All Stations"; "Check-in Station Software" with a "Download Client Software" link; and "Template Options" with checkboxes for "Run On All Stations" and "Show All Campuses".

After downloading the installer, open it, and you'll be directed through the installation steps. Then you're ready to proceed to the next step!

## Step 4: License Your Check-in Stations

**Note: A computer must be licensed in order to run check-in. A license is not needed on administrative computers that aren't used for processing check-ins. Before a check-in computer can be licensed, the KidCheck Client needs to have been installed. Installation directions can be found back in Step 1: Install the KidCheck Client.**

On each of your check-in stations, **log in** to your KidCheck account, click on the **Settings Gear** icon in the upper right, and then on the **Licensing** item in the left sidebar. Finally, click on the **Edit This Computer's License** link.

Enter the appropriate settings for your check-in station:

- **Name:** a name to designate the computer being licensed.
- **Description:** (optional) additional details of the computer being licensed.
- **Campus Where Station is Located:** Select your campus from the menu.
- **Check-in Station Type:** Staff attended or self-service. If you plan on having a volunteer/staff member in the vicinity of the station, choose Staff Attended.
- **Label Printer Setup:** Select your label printer (if applicable).
- **Default Language:** Select the language you'd like to use.
- **Activate This Station:** Select "Yes, license this station to run check-in".
- **Enable On-Screen-Keyboard:** (if applicable) Select this if you have a touchscreen and want to use the on-screen keyboard.
- Click the green **Save Changes** button.

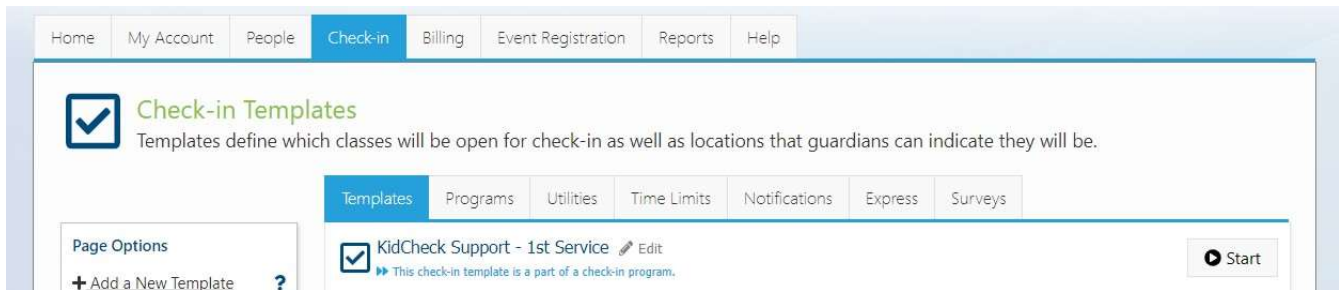
<p><b>Check-in Station Name:</b>  <input type="text" value="Kiosk PC"/></p> <p><b>Check-in Station Description:</b>  <input type="text"/></p>	<p><b>Check-in Station ID:</b>                  024E-96D9-A835-61D9-96A8-D239-E745-FF81</p> <p><b>Campus Where Station is Located:</b>  <input type="text" value="KidCheck Support"/></p>
<p><b>🖨️ Check-in Station Type</b>                  Will your check-in station be attended or self-service?</p>	<p><b>How will this check-in station be used?</b>  <input checked="" type="checkbox"/> Staff Attended <input type="checkbox"/> Self-Service</p>
<p><b>✓ Default Check-In Type</b>                  Select the default check-in type.</p>	<p><b>Default Check-In Type</b>  <input checked="" type="checkbox"/> Traditional Check-In <input type="checkbox"/> Roster Check-In</p>
<p><b>🖨️ Label Printer Setup</b>                  Select your printer settings.</p>	<p><b>Print labels for each child checked in at this station?</b>  <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>System Printer:</b> <input type="text" value="Brother QL-800 (Local Printer)"/> <b>Printer Mode:</b> <input type="text" value="High Speed"/></p>
<p><b>🌐 Default Language</b>                  Select the default language for this check-in station.</p>	<p><b>Default Kiosk Language:</b>  <input type="text" value="English (English)"/></p>
<p><b>🔒 Activate This Check-in Station</b>                  Do you want to use one of your licenses for this check-in station?</p>	<p><b>Use a license and activate this station?</b>  <input type="checkbox"/> No, do not license this station for check-in.  <input checked="" type="checkbox"/> Yes, license this station to run check-in.</p>
<p><b>🗂️ Enable On-Screen-Keyboard</b>                  Enable the KidCheck on-screen-keyboard for touch screens.</p>	<p><b>KidCheck On-Screen-Keyboard for Check-in</b>  <input type="checkbox"/> Enable</p>

Save Changes



## Step 5: Start Check-in

After creating your locations and templates, starting check-in is quick and easy. Under the **Check-in** tab, click **Start** next to the template you wish to start. Alternatively, if you've created a check-in program, click on the **Programs** tab and start the appropriate program.



By default, check-in will open in Kiosk Mode, where the check-in window is full screen, and access to the rest of the computer is limited. If you prefer to run check-in in non-kiosk mode, consult our Administrative FAQ's section of our website.

Finally, if the icons next to your templates and programs read "Waiting for KidCheck Client" rather than "Start", please consult our Administrative FAQ's section.

**Next, be sure to read KidCheck's Roll Out Guide for helpful hints and tips related to getting KidCheck rolled out at your organization!**

# Step 6: KidCheck Settings

## 1. Navigate to the Settings area

To access the settings area of KidCheck, log into your KidCheck account, and **click on the “System Settings” gear icon at the top right corner of the page.** This is where you can manage your organization’s information, configure check-in and printing settings, set up your campus and locations, manage licenses and admins, and sign up for KidCheck’s Label Restock Program.

## 2. Your Account area

This is where you’ll find your main account information. **Double-check the information in the Account Information and Subscription tabs** to ensure it is correct and make any necessary updates. Once you’ve added additional administrators to your account (see step 4 below), make sure to choose the correct Primary Contact (this is the person we will contact when we need to communicate with your organization).

We encourage our customers to **join the Label Restock Program (LRP)**, a free service that ensures you never run out of labels. The program will count the labels as they are printed and notifies us when you are ready for your next shipment. You can choose the minimum trigger quantity and order quantity, and you always have 48 hours to decline your next shipment.

To enroll, check the **Enable Label Restock** box (in the **Label Restock Program** settings) and fill out the information. Then finish by selecting **Save Changes** at the lower right.

## 3. System Settings area

This is where you can change and configure dozens of features, such as the appearance of KidCheck, child/staff ratios, text messaging, custom EULA, name badge settings and much, much more.

There are multiple settings categories on the left side. In each option area choose the best setting for your organization for each of the items listed. Remember to

**click “Save Changes”** after changing your settings! If you have any questions or need advice about any of your options, you can always contact us (208-538-2000).

#### **4. User Manager area**

This is where additional individuals can be given administrative access to your organization’s KidCheck account. To be given administrative rights, the individual(s) you plan to add must have already created a KidCheck account complete with username and password.

To add a security role, go to **System Settings > System Options > User Manager > Add a New Administrator** and begin typing their complete phone number in the search box and click search. If they have a KidCheck account, you’ll be able to select them, and then choose the type of access you want them to have.

## **Step 7: Manage Your Subscription**

The **Billing & Order History** (System Settings gear > Billing & Order History) can be used to update your credit card information and receipt email address, along with conveying your billing history with KidCheck. You will also find the **Your Subscription** section displaying the edition you are on, your monthly cost, and our support contact number for any needed subscription change (208-538-2000).

# Step 8: Label Restock Program-Save Money

## Enroll in the Label Restock Program

We encourage you to join **Label Restock Program (LRP)**, a free service saving you money with a lower price, and ensures you never run out of labels. The program counts labels as they print and notifies us when you need more. You choose the trigger and order quantity, and have 48 hours to decline your next shipment.

To enroll, click on the **System Settings** gear>**Label Restock Program**, and check **Enable Label Restock** box. Then choose the tab matching your label printer model (**Dymo** or **Brother**), fill out the necessary information and click **Save Changes**.

The screenshot shows the 'Label Restock Program' configuration interface for a Brother printer. On the left is a 'Your Account' sidebar with options like 'Account Information', 'Billing & Order History', 'Merchant Account', 'Licensing', 'Label Restock Program' (highlighted), 'Order Accessories', and 'System Options'. The main content area is titled 'DYMO Brother' and contains several sections:

- Enable Label Restock:** Includes a checkbox 'Enable Label Restock For This Campus' which is checked. Description: 'Allows you to turn on or off the label restock program.'
- Restock Settings:** Includes 'Trigger Qty (Rolls):' (4), 'Restock Qty (Rolls):' (18 Rolls), and 'Current Qty On Hand (Rolls):' (4.0). Descriptions: 'Trigger Qty - The minimum amount of labels (in rolls) that you want to have on hand before KidCheck automatically triggers a restock.' and 'Restock Qty - The number of rolls you want to receive when a restock is triggered.'
- Trigger Notifications:** Includes 'Trigger Notification Recipients:' set to 'All Administrators Will Be Notified'. Description: 'Who in your organization should be notified when you reach your trigger level that a restock is in process?'
- Shipping Address:** Includes 'Shipping Address:' (10020 W Fairview Ave STE 204), 'Boise', 'Idaho', '83704', and 'United States'. Description: 'What address do we need to ship your restock to when triggered?'. A link 'Copy Address From Main Address On-File' is present.
- Pricing:** Includes 'Price Per Roll:' (\$7.99), 'Sales Tax:' (6%), 'Shipping:' (\$17.26), and 'Total per Restock:' (\$169.71). Description: 'The total to be billed to your credit card for each restock.' An unchecked checkbox 'Enable Custom Pricing' is also present. A link 'Click here to re-calculate total' is at the bottom.

At the bottom, there is a 'Payment Information' section with a note: 'Labels purchased through the Label Restock Program are charged using the same payment method as your KidCheck subscription.' and a 'Payment Method:' field (ending in .). A green 'Save Changes' button is located at the bottom right.