

QuixChex - Demo Guide

Revision 1.1 - 3 August 2026

For: anyone reviewing the QuixChex demo

Demo: <https://demo.quixchex.net>

What QuixChex is

QuixChex runs everything about a service business except the work itself: the customers, the schedule, the crew, the estimates, the invoices, the payments and the books.

It is **not** a payment processor and not a bank. You keep your own gateway and merchant account - QuixChex integrates with them. What it does is put the money side and the work side in one place, so the invoice, the job it came from, and the payment that settled it are the same record rather than three systems you reconcile by hand.

Using the demo

Everything in the demo is invented. The businesses, the customers, the money and the crews are made up, and a **DEMO** badge sits at the bottom of every screen so nobody mistakes it for a live account.

Three things worth knowing before you click:

- **Nothing here charges anyone.** Card and bank capture is simulated end to end. You can take a payment, refund it, and watch the books move without a cent going anywhere.
 - **It is a shared sandbox.** Other people are looking at the same accounts, so you may find a customer someone else added. That is expected.
 - **Log in as the trade closest to yours.** The whole point of QuixChex is that the account arrives shaped around your trade, so the lawn account and the dental account do not look alike.
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Logins

Every account below uses the password **Demo1234!** unless stated otherwise.

Login	Business	What it shows
demo.paypro@quixchex.net	Coastal Payments	Field crews, jobs board, live map
demo.construction@quixchex.net	Kolba Construction Co	Estimates to jobs, draws, crew and 1099s
demo.electrical@quixchex.net	Voltmaster Electric	Service and remodel electrical
demo.drywall@quixchex.net	SmoothWall Drywall	Hang, tape, mud, finish
demo.flooring@quixchex.net	Heartwood Flooring	Install, sand, refinish
demo.lawn@quixchex.net	Evergreen Lawn & Tree Co	Route work, property-based jobs

demo.groomer@quixchex.net	Pawsitively Groomed	Appointments and counter sales
demo.salon@quixchex.net	Bella Vita Salon & Spa	Stylist booking, service menu
demo.detailing@quixchex.net	Showroom Shine Detailing	Vehicle-based booking
demo.fitness@quixchex.net	Iron Peak Fitness	Memberships, classes, sessions
demo.clinic@quixchex.net	Cedar Creek Family Clinic	Self-pay visits and copays
demo.property@quixchex.net	Harborstone Property Mgmt	Recurring rent by unit
demo.vendor@quixchex.net	Ravenmoor Merch & Curios	Event and festival booth sales
demo.retail@quixchex.net	Wanderlight Goods	Retail counter
demo.repair@quixchex.net	Coghill Cycle & Repair	Retail plus repair work
demo.billing@quixchex.net	Port City Processing	Recurring billing at scale

Two accounts show what a **restricted** login looks like - the same business, less of it:

Login	Belongs to	What is taken away
demo.frontdesk@quixchex.net	Pawsitively Groomed	Books and takes payment, but cannot refund
demo.foreman@quixchex.net	Kolba Construction	Jobs and labour only, no money at all

The screenshot displays the QuixChex PayPro dashboard for a business named 'Coastal Payments'. The interface includes a sidebar with navigation options like Dashboard, Customers, Schedules, and Templates. The main content area shows the business's verified status, contact information, and a summary of today's activities. Key metrics include 2 payments out of 500 transactions this month, 0 jobs today, 1 job in progress, 5 jobs in the pipeline, and \$0 won this month. The dashboard also features a section for 'Today's jobs' and a schedule for the day.

The PayPro dashboard: today's jobs, the pipeline, and this cycle's transaction count broken down by type.

Where to start

If you run **jobs** - estimates, site visits, crews - start with **Kolba Construction**.

Open a job and follow it end to end: the bid, the approved price, the change order that moves it, the draws that bill it, and the crew days that cost it. The profit figure on the job is derived from all of that, not typed in.

The screenshot shows the QuixChex software interface. The sidebar on the left contains navigation links: PayPro, Dashboard, Customers, Schedules, Templates, Finance, Payments, QuixSig Esign, Reports, Statistics, System, Appearance, PayPro Management, Report a Bug, and Feature Request. The main content area is titled 'Coastal Payments' and features a 'Jobs & Estimates' section. This section has tabs for 'Board', 'Calendar', and 'Inspection checklist'. Below the tabs, there are two categories of jobs: 'Active / scheduled (2)' and 'Completed (1)'. Each category contains job cards with details such as location, technician, date, and price. The 'Active / scheduled' jobs include 'Boiler replacement — Myrtle Grove' and 'Annual service — 4 rooftop units — Downtown'. The 'Completed' job is 'Pool pump + filter service — Riverfront'. The interface also includes a 'Call' button and a 'New Job' button.

Status	Job Title	Location	Technician	Date	Price	Unbilled
Active / scheduled (2)	Boiler replacement — Myrtle Grove	Sam Whitfield · 5600 Carolina Beach Rd	Emily Nguyen	7/24/2026, 3:23:52 PM	\$ 6,400	Unbilled
Active / scheduled (2)	Annual service — 4 rooftop units — Downtown	Downtown Business Assoc. · 226 N Front St	Mike Rodriguez	7/25/2026, 3:23:52 PM	\$ 1,850	Unbilled
Completed (1)	Pool pump + filter service — Riverfront	Harbor Suites · 10 Cowan St	Tyrone Jackson		\$ 780	Unbilled

The jobs board. Every job carries its own money: the approved price, what has been billed, and what is still outstanding.

If you run **appointments** - grooming, salon, detailing, clinic, gym - start with **Pawsitively Groomed**. Book something, take payment at the counter, then look at the day. The subject of the booking changes with the trade: a pet, a client, a vehicle, a patient.

QUIXCHEX

PayPro

Dashboard

Customers

Schedules

Templates

Finance

Payments

QuixSig Esign

Reports

Statistics

System

Appearance

PayPro Management

Report a Bug

Feature Request

Coastal Payments

type / for spotlight search Offline

Appointments

Book and manage your calendar.

CalendarListBook Appointment

TodayAugust 2026

DayWeekMonthYear

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Betty Coastal
demo.paypro@quixchex.net

DEMO — QuixChex (sample data)

Appointments. The subject of a booking changes with the trade - a pet here, a vehicle or a patient elsewhere.

If you bill the same people every month - rent, retainers, memberships - start with **Harborstone Property Mgmt** or **Port City Processing**. Look at a schedule and its run history. This is the part QuixChex was originally built to do.

QUIXCHEX
Coastal Payments
type / for spotlight search ● Offline 🔔

PayPro

- Dashboard
- Customers >
- Schedules >
- Templates >

Finance

- Payments
- QuixSig Esign >
- Reports
- Statistics

System

- Appearance
- PayPro Management >
- Report a Bug
- Feature Request

Payment Schedules Automated payment timelines — status, runs, failures, completions.

[Create Schedule](#)

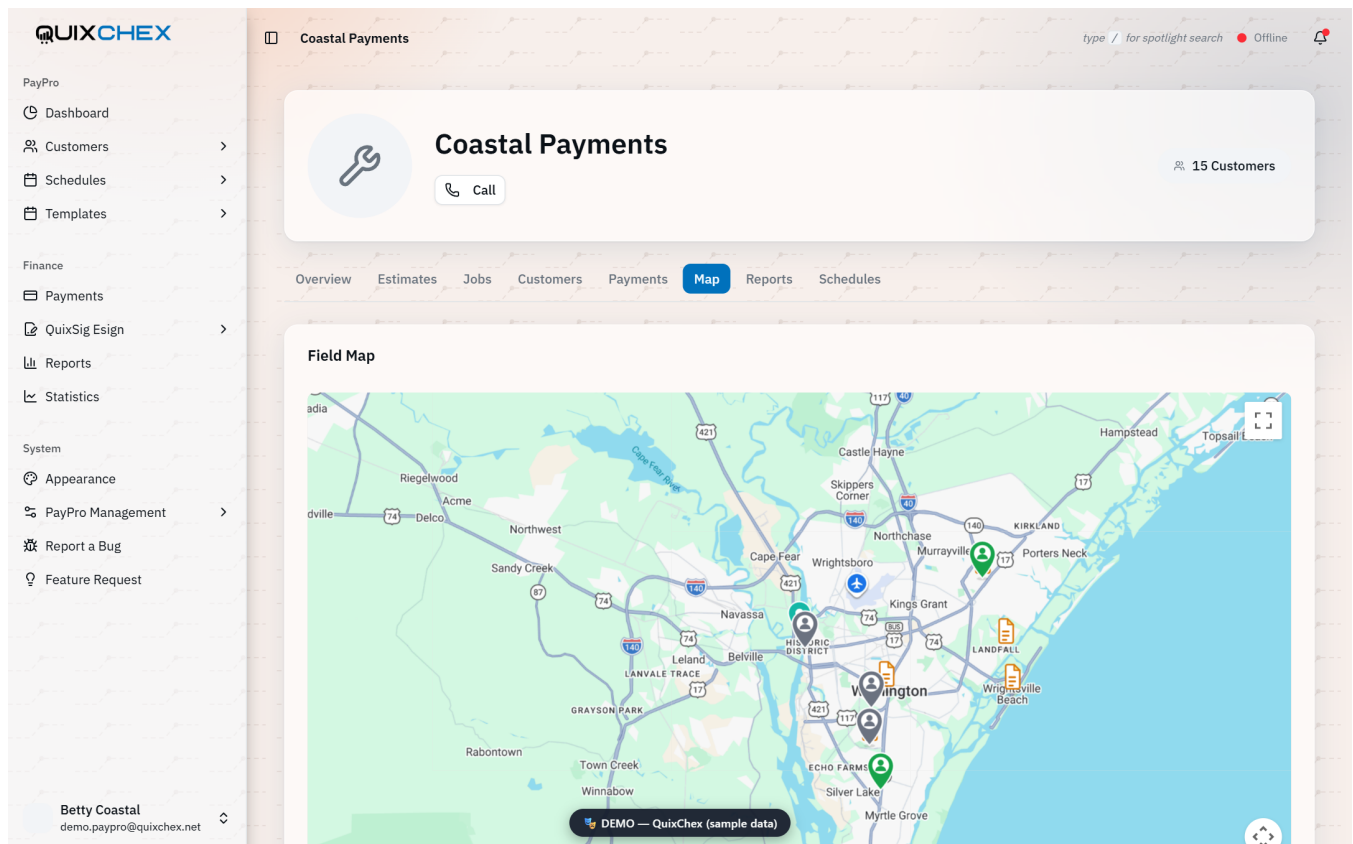
[List](#) | [Calendar](#)

[+ Add Schedule](#)

Customer ↕	Total ↕ ▼	Type ↕ ▼	Next Run ↕ ▼	Last Run ↕ ▼	Status ↕ ▼	Created ↕ ▼	ⓘ
Davis LLC <i>Monthly Service Plan</i>	\$192.10	Scheduled	09/16/2026, 6:00 AM -	-	ACTIVE	07/11/2026, 3:23 PM	ⓘ
Harborview Dental Group <i>Maintenance Agreement</i>	\$583.10	Immediate	-	07/11/2026, 3:23 PM	COMPLETED	07/11/2026, 3:23 PM	ⓘ
Lee Solutions <i>Maintenance Agreement</i>	\$314.04	Immediate	-	07/09/2026, 3:23 PM	COMPLETED	07/09/2026, 3:23 PM	ⓘ
Jackson Group <i>Equipment Lease</i>	\$562.35	Immediate	-	07/09/2026, 3:23 PM	COMPLETED	07/09/2026, 3:23 PM	ⓘ
Hernandez LLC <i>Security Monitoring</i>	\$382.79	Immediate	-	07/05/2026, 3:23 PM	COMPLETED	07/05/2026, 3:23 PM	ⓘ
Jackson Group <i>Support Retainer</i>	\$338.03	Immediate	-	07/04/2026, 3:23 PM	COMPLETED	07/04/2026, 3:23 PM	ⓘ
Hernandez LLC <i>Managed IT Support</i>	\$661.27	Immediate	-	06/23/2026, 3:23 PM	COMPLETED	06/23/2026, 3:23 PM	ⓘ
Harborview Dental Group <i>Software Subscription</i>	\$391.24	Recurring weekly • on FRIDAY	08/07/2026, 6:03 AM	07/31/2026, 6:03 AM	ACTIVE	05/29/2026, 3:23 PM	ⓘ
Taylor Inc <i>Software Subscription</i>	\$334.46	Scheduled	-	07/29/2026, 3:25 PM	COMPLETED	05/24/2026, 3:23 PM	ⓘ
Wilson Inc <i>Security Monitoring</i>	\$163.50	Scheduled	08/26/2026, 6:00 AM -	-	ACTIVE	05/18/2026, 3:23 PM	ⓘ

Betty Coastal demo.paypro@quixchex.net

If you want to see crews on a map - Coastal Payments. Employees clock in from their phones, the office sees where they are while they are on the clock, and arriving at a job is detected rather than typed.



The live map. Crew positions while they are on the clock, and nothing outside a shift.

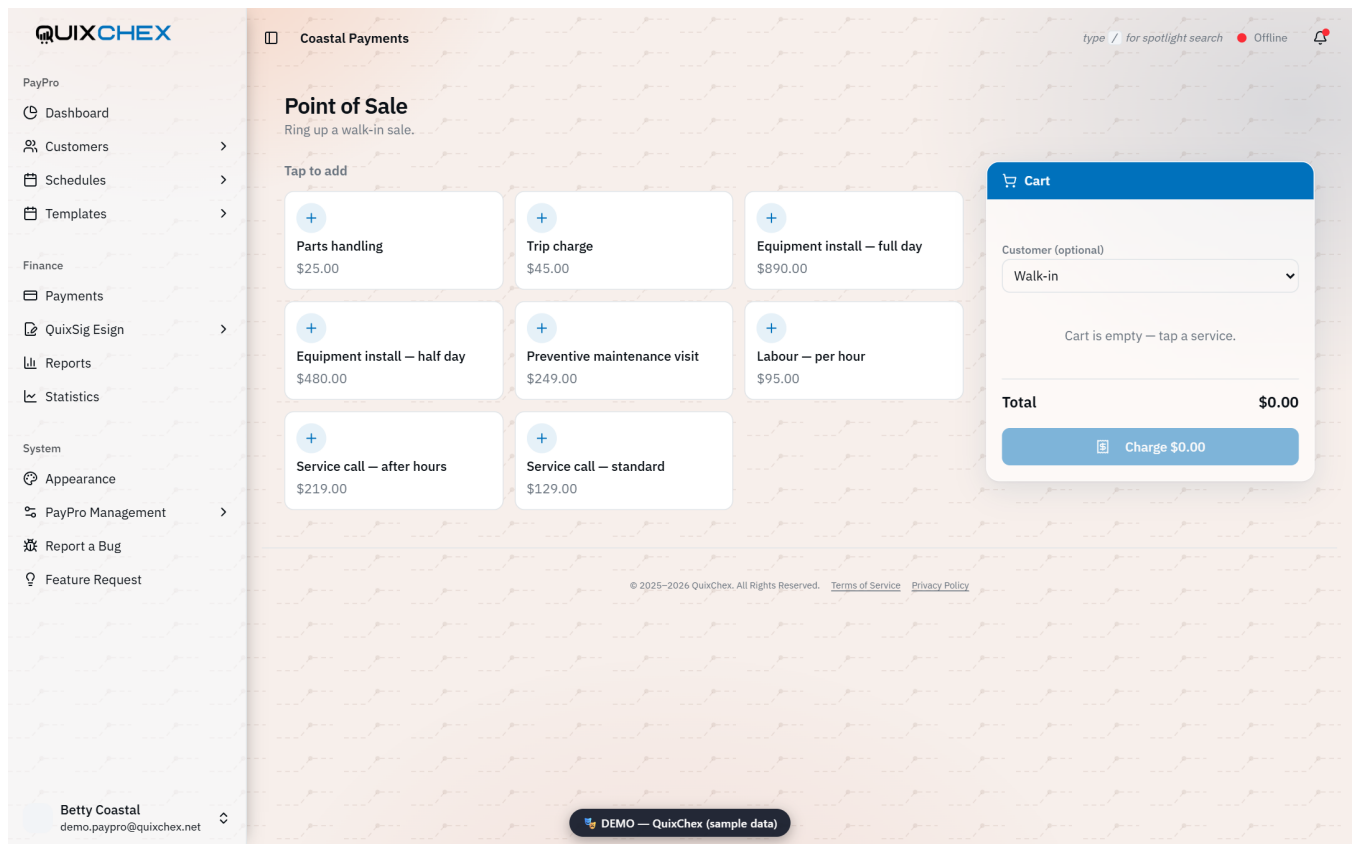
The money side

Every screen that takes money works the same way, whether it is a counter sale, an appointment, a job deposit or a draw: pick a method, take it, and it lands on the customer's record and in the books at once.

- **Invoices** are pay links. You send one, the customer opens it, pays it, and the job it came from settles itself.

- **QuixSig** is our own e-signature. Estimates, change orders and bank authorisations are signed in the browser and stored with the document. There is no third-party signing account.

- **Refunds** are first-class, not an afterthought, and the books show them as a reversal rather than a negative sale.



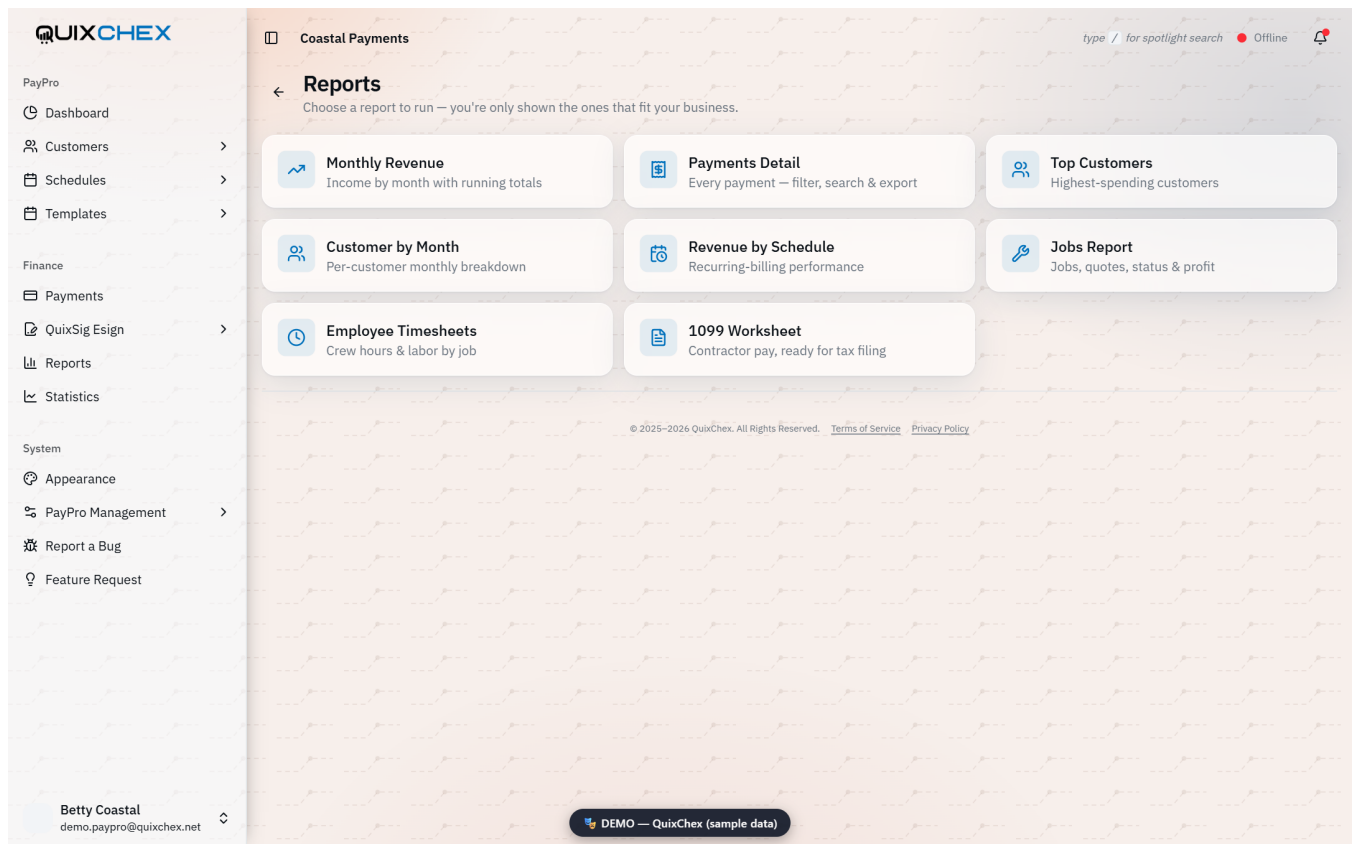
Taking payment at the counter. Card, bank draft, pay link or cash - all land on the customer record and in the books at once.

Field crews and location

Crew tracking is off unless a business turns it on, and even then:

- Location is collected **only between clock-in and clock-out**. A reading sent outside a shift is refused by the server, not stored.
- The employee is shown a notice and has to **accept it before anything is collected**. Who accepted, when, and which wording is recorded.
- Raw location is **kept for six months** and then deleted automatically.
- Deactivating someone clears their last known position, and the business can erase an employee's entire location history at any time.

The privacy policy at quixchex.com sets this out in full.



Reports run on the same data the screens do - no overnight export, no separate warehouse.

What is real and what is not

	In the demo	In a real account
Card and bank capture	Simulated	Live, through your own gateway
Emails and documents	Real, sent from the platform	Same
Customers, jobs, money	Invented	Yours
Reports and books	Real arithmetic on invented data	Same arithmetic

The demo is the actual product against fake data. Nothing is mocked up in slides.

The screenshot displays the QuixChex Coastal Payments dashboard. On the left is a sidebar menu with categories: PayPro (Dashboard, Customers, Schedules, Templates), Finance (Payments, QuixSig Esign, Reports, Statistics), and System (Appearance, PayPro Management, Report a Bug, Feature Request). The main content area is titled 'Coastal Payments' and shows a 'Call' button and '15 Customers'. Below this is a navigation bar with tabs: Overview, Estimates (active), Jobs, Customers, Payments, Map, Reports, and Schedules. The 'Estimates' section shows '5 open - \$1,200 in the pipeline' and a '+ New estimate' button. A table lists five estimates, all marked as 'Being written' and 'Not sent to the customer yet':

Estimate Description	Customer Name	Amount	Status	Action
Condenser replacement + coil clean — Midtown	Nina Alvarez	\$1,200	Being written	>
Walk-in cooler running warm — Wrightsville	Owen Brooks	-	Being written	>
Pool heater fault — Ogden	Dana Ellis	-	Being written	>
Heat pump assessment — Landfall	Ravi Patel	-	Being written	>
No cooling upstairs — Forest Hills	Grace Palmer	-	Being written	>

At the bottom left, the user is identified as 'Betty Coastal' with email 'demo.paypro@quixchex.net'. At the bottom center, a banner reads 'DEMO — QuixChex (sample data)'. At the bottom right are links for 'Terms of Service' and 'Privacy Policy'.

Bids priced line by line, which become the job and the payment schedule.

When you have seen enough

Sign up at <https://quixchex.net/#/dealer-register>. Tell us your trade and the account arrives already set up: your services, your prices, your screens.

Accounts are reviewed before they open, so you will get an email to confirm your address and a second one when the account is activated. Nothing is charged at signup - the seat count and the plan are agreed with you before the first bill.

Questions: info@quixchex.com · 855.784.9249

QuixChex comes out of Port City Processing LLC, a merchant services company.