



Petsit Billing Reminders

In LeashTime, a Petsit, or Short Term Schedule, is a schedule with a definite start and end date. Petsits are usually set up using the EZ Schedule tool. For each Petsit schedule that you setup, you can receive a notification in your **Request Queue** indicating that the schedule is about to start. You can also receive a reminder when the schedule has been completed.

The reminder will look like **Figure 1**. At the designated time, you will receive a reminder about a schedule that is going to begin. There are multiple actions you can take after receiving the reminder:

- Review the scheduled visits
- **Send Confirmation** of the schedule to the client (and sitter). See **Figure 2**.
- **Send Statement** of charges to the client. See **Figure 3**.
- **Charge** the client for the Petsit visits (if a valid electronic payment record exists for the client)

Edit Client Request

Billable Schedule:

Abraham Wymer

12/17/2011 – 12/20/2011 (4 visits) \$ 40.00

Date	Time	Service	Sitter
12/17/2011 Sat	11:00 am-1:00 pm	Dog Walk	Kimberly
12/18/2011 Sun	11:00 am-1:00 pm	Dog Walk	Kimberly
12/19/2011 Mon	11:00 am-1:00 pm	Dog Walk	Kimberly
12/20/2011 Tue	11:00 am-1:00 pm	Dog Walk	Kimberly

Send Confirmation **Send Statement**

Last Payment: \$ 126.00 on 7/26/2011

Office Notes:

Save As-Is **Resolve and Save** **Quit**

FIGURE 1: Billing Reminder for Petsit Schedule

If you decide to send a **Confirmation** or **Statement** of charges, you will have the opportunity to compose a custom email message and/or use a template email message. Once you send a **Confirmation** or **Statement**, a copy of the message will be stored in the **Communications** log for the client. LeashTime will update the Office Notes field in the reminder to reflect the date that a **Confirmation** or **Statement** was sent.

You can process a credit card (or electronic check) payment from this reminder if the client has a card or payment account registered with your business. The amount field is set to the total charges due for the Petsit schedule. You may change this amount before you process the charge (e.g., if you require only a 50% payment prior to the schedule start date).

The Last Payment amount and date is recorded and displayed for you. Please note that if the client has prior unpaid billables, they will be paid off before this schedule is paid off.

If you are not ready to Resolve this Notification but want to make a notation about the billing, you can type a message into the Office Notes field and click **Save As-Is**. This will keep the Billing Reminder in your Request Queue list and allow you to refer back to the note at a later time.

Click the **Resolve and Save** button once you have completed all the actions you want to take regarding this Petsit schedule. NO EMAILS WILL BE SENT as a result of clicking **Resolve and Save**. The Notification will disappear from the regular Request Queue. However, you can still review resolved requests or go directly to the client's profile to send out a statement or process a payment.

July						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			6 1 visit 11a-11a Dog Walk Brian Griffith	7 No visits.	8 No visits.	9 No visits.
10 No visits.	11 3 visits	12 2 visits	13 2 visits 6a-9a Dog Walk Brian Griffith	14 2 visits 1p-3p Dog Walk Brian Griffith	15 2 visits 1p-3p Dog Walk Brian Griffith	

Figure 2: Confirmation Email of Petsit Schedule

 Dog's Life 123 Main Street Vienna VA 22180 Phone: 703 555 1212 – FAX: – Email: elisedavies21@yahoo.com http://lwmr.info/dogslife	Statement Customer Number: 47 Invoice Date: 07/04/2011 Amount Due: \$ 3641.05cr								
Elroy Krum 45 Birch Street 22180									
Please detach here and return with payment.									
STATEMENT									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #ADD8E6;">Account Summary</th> <th style="background-color: #ADD8E6;">Customer Number: 47</th> </tr> </thead> <tbody> <tr> <td>Elroy Krum 45 Birch Street 22180</td> <td> Current Charges \$ 216.00 Tax \$ 0.00 Prior Charges \$ 0.00 Payments & Credits \$ 3857.05 Amount Due \$ 3641.05cr Date Due Upon Receipt </td> </tr> </tbody> </table>		Account Summary	Customer Number: 47	Elroy Krum 45 Birch Street 22180	Current Charges \$ 216.00 Tax \$ 0.00 Prior Charges \$ 0.00 Payments & Credits \$ 3857.05 Amount Due \$ 3641.05cr Date Due Upon Receipt				
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Figure 3: Statement of Service

Setting up Billing Reminders

To use Billing Reminders in LeashTime, you must first turn them on. To do this, go to **Admin > Preferences > Billing Preferences**. The Billing Preferences section should be expanded as shown in **Figure 4**.

- (1) Click **Send Billing Reminders** and set it to “yes”
- (2) Click **Billing Reminder Lookahead (days)**. Set the number of days you want to be reminded in advance of the start of a petsit.
- (3) You will receive billing reminders in your **Request Queue** for petsit schedules.

Billing Preferences

Past Due Days

Bill On Day of Month

Bill On Day of Month

Enable Fixed-Price Monthly Schedules no

Credit Card Merchant Info

Credit Cards Accepted

Auto-Email Credit Receipts no

New Services Taxable By Default no

Tax Rate %

Automatic Surcharge Collision Policy

New Schedules are Prepaid by default no

Invoice Header

Invoice Preview Header

Suppress Visit Time of Day in Statements no

Suppress Visit Sitter Name of Day in Statements no

Include a gratuity line at the end of invoices no

Suppress the "Detach Here" line in invoices no

Mark visits at Start/End of Short Term schedules yes

Send Billing Reminders yes

Billing Reminder Lookahead (days) 3

Figure 4 – Billing Preferences to set up Billing Reminders

You may also set billing reminders in an EZ Schedule. If you want to override the global billing reminder setting, you may turn on the reminders for individual schedules (or turn them off). Just check or uncheck the **Send Billing Reminders** check box at the top of the EZ Schedule and **Save Changes**. See **Figure 5**.

--- Pick Something to Do --- Select All Visits - De-select All Visits Click on the dog to select a visit.

Save Changes Quit Delete Schedule

ts on : Saturday, December 24 and ends on Friday, December 30 (7 days)
Days without visits: 0 Price: \$85.00

December						
day	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
					24 2 visits. 	
26 	27 	28 	29 	30 		
 11a-1p Dog Walk Barbara						

Figure 5 – Modify billing reminder on an individual schedule