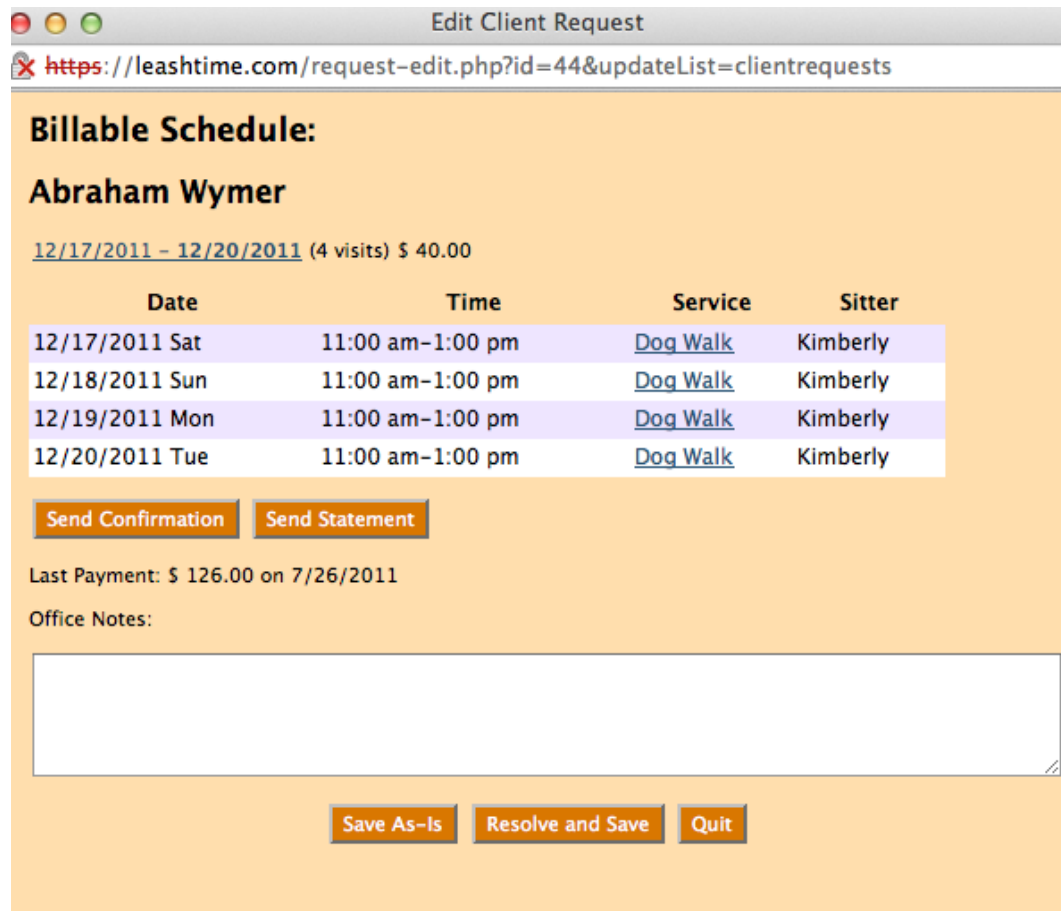


Petsit Billing Reminders

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

<https://leashtime.com/request-edit.php?id=44&updateList=clientrequests>

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

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

Office Notes:

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.

Schedule Description: Short Term Schedule Start Date: 07/06/2011 End Date: 07/15/2011 Services: \$ 240.00 Surcharges: Discounts: \$ -24.00 Total: \$ 216.00						
Schedule starts on : Wednesday, July 6 and ends on Friday, July 15 (10 days) Visits: 12 Days without visits: 4 Price: \$216.00						
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 6a-9a Dog Walk Brian Griffith 1p-3p Dog Walk Brian Griffith 5p-7p Dog Walk Brian Griffith	12 2 visits 1p-3p Dog Walk Brian Griffith	13 2 visits 1p-3p Dog Walk Brian Griffith 5p-7p Dog Walk Brian Griffith	14 2 visits 1p-3p Dog Walk Brian Griffith 5p-7p Dog Walk Brian Griffith	15 2 visits 1p-3p Dog Walk Brian Griffith 5p-7p 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://wvr.info/dogslife>
 Elroy Krum
 45 Birch Street
 22180

Statement
 Customer Number: 47
 Invoice Date: 07/04/2011
 Amount Due: \$ 3641.05cr

Please detach here and return with payment.

STATEMENT

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

Prior Unpaid Charges
 No Current Charges Found.

Current Charges

Date	Time of Day	Service	Sitter	Charge
07/06/2011	11:00 am-11:00 am	Dog Walk	Brian Griffith	\$ 18.00
07/11/2011	6:00 am-9:00 am	Dog Walk	Brian Griffith	\$ 18.00
07/11/2011	1:00 pm-3:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/11/2011	5:00 pm-7:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/12/2011	1:00 pm-3:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/12/2011	5:00 pm-7:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/13/2011	1:00 pm-3:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/13/2011	5:00 pm-7:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/14/2011	1:00 pm-3:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/14/2011	5:00 pm-7:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/15/2011	1:00 pm-3:00 pm	Dog Walk	Brian Griffith	\$ 18.00
07/15/2011	5:00 pm-7:00 pm	Dog Walk	Brian Griffith	\$ 18.00
Subtotal:				\$ 216.00

If you would like to add a gratuity, please write in an amount here.
 Thanks for your continued business.

\$ _____

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**.

Mark Start/Finish **Send Billing Reminders** Notes

Starts 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
					24 2 visits. <input type="button" value="+"/> <input type="checkbox"/> 11a-1p Dog Walk Barbara <input type="checkbox"/> sur: \$ 5.00 Christmas Eve Barbara
26 <input type="button" value="+"/>	27 <input type="button" value="+"/>	28 <input type="button" value="+"/>	29 <input type="button" value="+"/>	30 <input type="button" value="+"/>	
1 visit. <input type="checkbox"/> 11a-1p Dog Walk Barbara	1 visit. <input type="checkbox"/> 11a-1p Dog Walk Barbara	1 visit. <input type="checkbox"/> 11a-1p Dog Walk Barbara	1 visit. <input type="checkbox"/> 11a-1p Dog Walk Barbara	1 visit. <input type="checkbox"/> 11a-1p Dog Walk Barbara	

Figure 5 – Modify billing reminder on an individual schedule