

# LeashTime How-To Guide

February 1, 2011

This is a quick and handy reference guide to get step-by-step instructions on how to accomplish specific tasks in LeashTime. It is broken down by subject area (see Table of Contents). Please email [support@leashtime.com](mailto:support@leashtime.com) if you have a request for a How-To question to be included.

Below is a screen shot of the Home page in LeashTime. This is the first place you will come to after logging in. This particular Home page is in Summary View mode. You may also get a Detailed view by clicking the **Show Full Home Page Instead** link. It is important for all the How-To lessons that you know where the Menu Bar and Search Box are located.

HOME SCHEDULE SITTERS CLIENTS KEYS ADMIN LOGOUT Hi Ted, Today is: Jan 17, 2011

[Exit from Client Biz login]

Home

Menu Options

Search:

Search Box

Customer Requests (0 unresolved) (hide) ▲

Show resolved requests also Edit Reminders Recent confirmations - Confirmed: 1 Declined: 0 Overdue: 0

Client	Request	Date	Address	Phone
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Daily Service Visits (167 today) (hide) ▲

Date: 01/17/2011 Show Canceled:  Week-at-a-Glance

Visits for Monday, January 17, 2011

Show the Full Home Page Instead

Click link to get detailed view

Visits (discounted) (167): \$ 1,251.20

Day's Revenue including canceled visits: \$ 735.20 Canceled Visits (1): \$ 0.00

[Sitter Login Report](#) Surcharges: \$ 12.00

Discounts: \$ 6.80

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<a href="#">Unassigned</a> (2 visits): \$ 20.00	<a href="#">Jessica</a> (9 visits): \$ 0.00
<a href="#">Andy</a> (16 visits): \$ 175.00	<a href="#">John</a> (5 visits): \$ 0.00
<a href="#">Ashley</a> (5 visits): \$ 78.20	<a href="#">John E</a> (5 visits): \$ 13.00
<a href="#">Becky</a> (2 visits): \$ 40.00	<a href="#">Josh</a> (8 visits): \$ 0.00

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## How to... Set Business Service Pricing, Pet Types and Preferences

### Add a Service

- (1) Go to **ADMIN > Service List**
- (2) Click **Add Another Service**
- (3) Type in the name of the service, charge (price), additional pet rate, rate paid to sitter, additional pet rate paid to sitter, check whether the sitter pay is a percentage of the total visit charge.
- (4) Click **Save Changes**
- (5) The service type will now appear in your service selection drop-down lists
- (6) If you wish to change the specific pricing for a specific client, go to the **Client Profile Billing** section for a specific client and modify the values and save

### Delete or Deactivate a Service

Deactivating a service makes it stop appearing in selection drop-down lists.

- (1) Go to **ADMIN > Service List**
- (2) If the service has not been used yet in LeashTime, you can click the  to the left of the named service. This will simply delete the service from the system.
- (3) If you have already used the service, a smiley face  will appear next to the service. This means that the service has been used in LeashTime previously. You cannot delete the service but you can deactivate it by checking the deactivate checkbox.
- (4) Please be aware that if you deactivate a service, LeashTime will indicate in the visit details that the service type is deactivated. Deactivating a service does not cancel any existing visits of that service type.

### Add a Pet Type

- (1) Go to **ADMIN > Preferences**
- (2) Click **General Business**
- (3) Click on **Pet Types** link
- (4) Click **Add Another** (and continue doing so until you have entered all pet types you support)
- (5) Click **Save Pet Types** when done

### Add a Time Window

- (1) Go to **ADMIN > Client Management > Named Time Frame List**

- (2) In the **Label** field, type a named time frame
- (3) In the **Time of Day** field, click in the box to bring up the time widget
- (4) Select a start and end time (they can be the same)
- (5) Click **Done** in the time widget
- (6) Click **Save Time Frames**
- (7) This time window will now be part of the standard time window options available when you schedule a service

### **Add a Pet Services Agreement**

- (1) Go to **ADMIN > Client Management > Service Agreement**
- (2) Type a new label in for your Pet Sitting Agreement
- (3) Either type or cut & paste a Pet Sitting Agreement
- (4) Click **Save as New Local Version**
- (5) This Pet Sitting Agreement will show up as a click-thru license agreement to your clients when they login to their accounts. Please note that you must enable this option by going to **ADMIN > Preferences > Client User Interface > Signed Service Agreement Required**
- (6) LeashTime indicates whether or not clients have signed Pet Sitting Agreements in the client profile's **Basic Info** tab

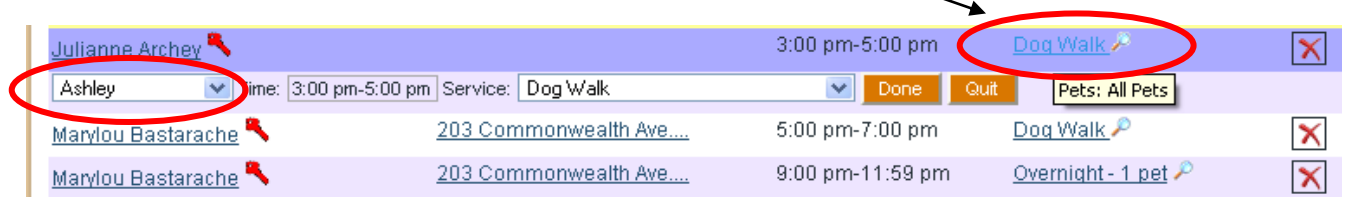
## How to... Manage Home Page

### Search for a Client, Pet

- (1) In the upper right hand section of any LeashTime page, there is a **Search:** box.
- (2) Type in the first few letters of the client name or pet name
- (3) A drop down menu will appear with possible matches
- (4) Move the mouse over the client that you want to access and click the left mouse button
- (5) You will be taken to the **Client Profile Services** section of that client's profile

### Reassign a single visit

- (1) Find a visit that you want to reassign and click the Service name



- (2) A mini entry form will appear beneath the service line item description
- (3) Select a new sitter in the leftmost column of the entry form
- (4) Click **Done**

### Reassign a group of visits from one sitter to other sitters

- (1) Click on **Reassign Visits** button next to the sitter name
- (2) You will be taken to the **Reassign Visits** page
- (3) Set a date range for which you want to review visits
- (4) Select a sitter that you want to reassign from and a sitter you want to reassign to
- (5) Both sitters' visits will be displayed
- (6) Drag and drop visits from the sitter on the left to the sitter on the right
- (7) Continue to select other sitters to reassign visits to, and drag and drop visits to them
- (8) Once you have reassigned all visits, click **Make All Reassignments**

### Hide canceled visits from view

- (1) Look below the Visits banner, about midway across the page
- (2) Uncheck the **Show Canceled Visits** checkbox

- (3) LeashTime will update the Home Page and hide any canceled visits

#### View a week-at-a-glance

- (1) Click the **Week-at-a-Glance** button below the Visits banner
- (2) A new popup window will appear that will show visits for the next 7 days
- (3) You may change the start and end dates (don't forget to click the **Show** button) to display visits for a shorter or longer date range


#### Change the time window on a single visit

- (1) Click the Service name
- (2) A mini entry form will appear below the visit listing
- (3) Click the time window box
- (4) A popup box will appear where you may select a new, predefined time window or a specific time
- (5) Click **Done**


#### Change the service type on a single visit

- (1) Click on the Service name
- (2) A mini entry form will appear below the visit listing
- (3) Select a new service type
- (4) Click Done
- (5) All pricing will be properly and automatically updated

#### Cancel a single visit

- (1) Click the Red  button next to the visit
- (2) The visit will change to a red banner background


#### Uncancel a single visit

- (1) Click the Undo Arrow  next to the visit
- (2) The visit will change to either Yellow (if in the past) or a neutral color (if incomplete)

#### Mark visits complete

There are two ways to mark visits complete on the Home Page.

First method:

- (1) Click on the magnifying glass icon  next to a particular visit




- (2) A visit detail popup will appear
- (3) Click on the **Completed** radio button
- (4) Click the **Update** Visit button
- (5) The visit will now be marked complete and will be highlighted in a shade of green

Second method:

- (1) Go the third section of the Home Page, **Incomplete Visits**
- (2) Select a date range to display incomplete visits
- (3) Click **Show Incomplete Visits** button
- (4) You may select individual visits to mark complete or **Select All**
- (5) Click the Mark Selected Visits complete button

#### **Obtain a detailed visit change history**

- (1) Click on the magnifying glass icon  next to a particular visit
- (2) At the bottom of the visitdetail popup, click View History
- (3) A detailed history of who changed the visit and when they changed it will appear

## How to... Manage Client Profile

### Create a new client profile

- (1) Go to **CLIENTS > New Client**
- (2) Fill in the required fields (First Name, Last Name)
- (3) If a note such as “1 similar name found.” appears, hold the mouse cursor over the note to see if the client you are adding is already in the database.
- (4) Click **Save Changes**
- (5) You do not have to fill in any other fields in order to start scheduling and managing this client. As you get more information about this client’s profile, you may add it. Be sure to click the **Save Changes** button when you do add information.

### Deactivate a client

- (1) Search for the client you wish to deactivate
- (2) On the **Basic Info** tab, uncheck the **Active** box
- (3) Click **Save Changes**
- (4) The client will now be inactive
- (5) All of their future visits will be deleted.

### Set up a login for the client

- (1) Search for a client for whom you would like to provide a login
- (2) In the **Basic Info** tab, click the **Set Client Login** button
- (3) Type in a **Username** (or use one of the LeashTime suggested user names)
- (4) Type in a **Password**
- (5) Retype the **Password**
- (6) Click **Save New Login** for [Client First Name Last Name]

### Apply a discount for a client

- (1) Search for a client
- (2) In the **Basic Info** tab, choose a discount type you want to apply to the client
- (3) Click **Save Changes**
- (4) All new services scheduled for this client will have the discount amount automatically applied. Previously scheduled services will not have the discount applied.

NOTE: To set up discount types, see the How-To Discounts

### Set up a referral for a client

- (1) Search for a client
- (2) In the Basic Info tab, choose a referral type you want to apply to the client
- (3) Depending on the type of referral you have set up, you may have to set a sub-referral type.  
Referral note is optional.
- (4) Click **Save Changes**

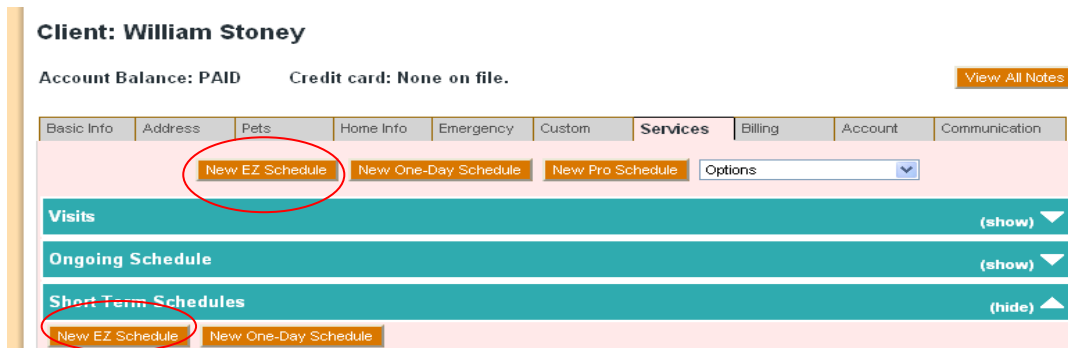
You can go to **ADMIN > Reports > Revenue Report by Referral Type** to see a report.

NOTE: To set up referral types, see the How-To Manage Referrals

## How to...set up Short Term Schedules (EZ Schedules)

### Create a new schedule

- (1) Search for a client.
- (2) Click the **New EZ Schedule** button in the Services tab of the client's profile.



- (3) Enter a start and end date
- (4) Select a primary sitter
- (5) Click the **Create Schedule and Add Visits** button

### Create a visit

- (1) Click the **+** on a day where you would like to add a visit
- (2) Set the **Time of Day, Service Type, Sitter, Days of the Week**
- (3) If you need to edit more details about the visit, click on the **Show More Details** and fill out the appropriate fields
- (4) Click **Add Visit**

### Add a Surcharge

- (1) Click the **+** for a day where you would like to add a surcharge
- (2) Click the link at the top of the page that says **Add a Surcharge Instead**
- (3) Select a surcharge type to add
- (4) Select a sitter to pay
- (5) Click **Save**

### Delete a Group of Visits

- (1) Select one or more visits by clicking on the dog (or any blank part of the visit background).
- (2) Go to the **Pick Something to Do** dropdown
- (3) Select **Delete**
- (4) The visits will be deleted

### Delete all Visits

- (1) Click **Select All**
- (2) Make sure all the visits are highlighted with a red border
- (3) Go to the **Pick Something to Do** dropdown
- (4) Select **Delete** from the menu and the visit (s) will automatically be removed completely

### Add more visits outside of the current date range

- (1) Click on **Edit Date Range**
- (2) Set the date range to a new date range
- (3) Click **Hide Date Range**
- (4) The new dates should appear in the calendar below

**NOTE: IF YOU NARROW OR MOVE THE DATE RANGE, EXISTING VISITS OUTSIDE OF THE NEW DATE RANGE WILL NOT BE AUTOMATICALLY DELETED.**

### Copy a visit

- (1) Follow the steps in Create a visit
- (2) Select one of the copy patterns from the dropdown list **Copy To:**
- (3) Then click **Add Visit** button

### Reassign visits to a new sitter

- (1) Select the visits that you want to reassign by clicking on the dog (or in any empty space) within each of the visit boxes
- (2) Select **Reassign to...**
- (3) Select a Sitter
- (4) LeashTime will automatically assign the selected visits to a sitter

### Apply or remove a discount on visit(s)

- (1) Select the visits you want to apply or remove a discount for

- (2) Use the pulldown menu to select **Apply Discount**
- (3) Select a discount type (or **No Discount**) from the pulldown below
- (4) Discounts will now be automatically removed (or applied) on the visits

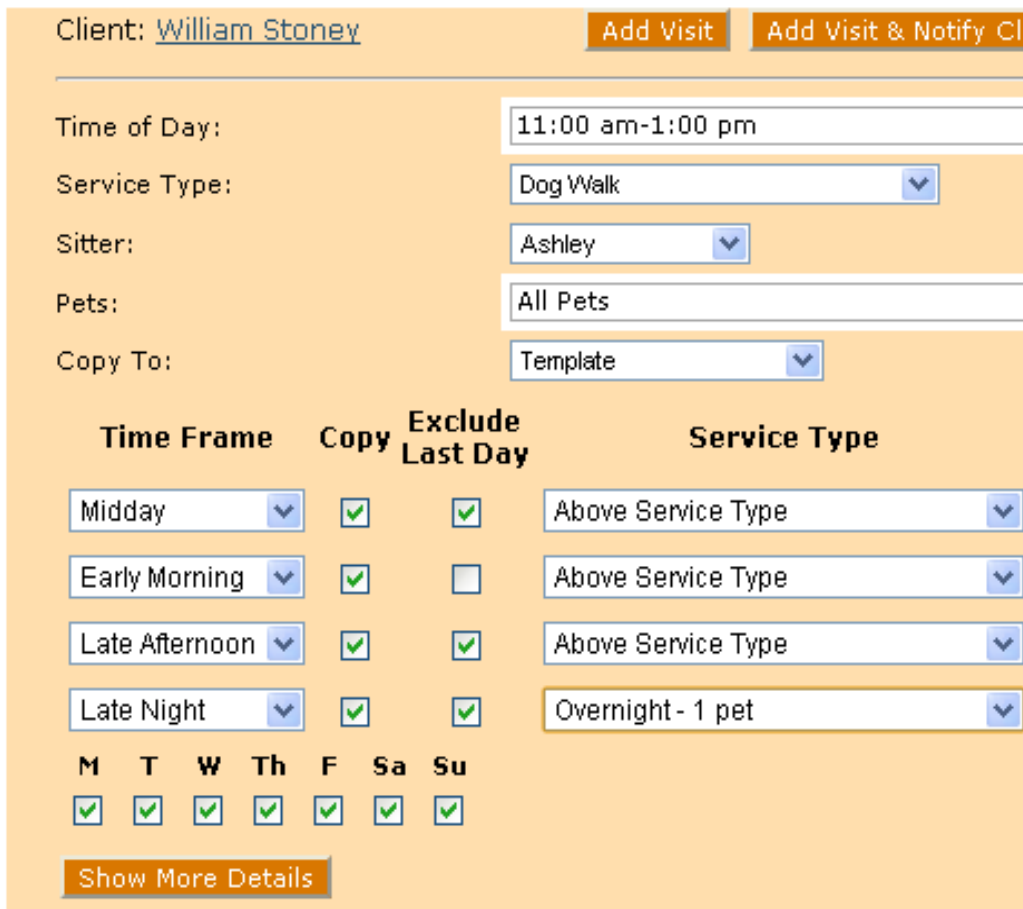
### Set up a pattern of visits with first and last day different from days-in-between

- (1) Your client is going away for a long weekend and requests the following
  - a. First day – evening walk, overnight
  - b. Days-in-Between – three walks and overnight
  - c. Last day – morning walk

(2) Click the  on the first day

(3) Set the time of day, service type and sitter of the first visit

(4) Go to the **Copy To:** dropdown and select **Template**



Client: [William Stoney](#) Add Visit Add Visit & Notify Cl

Time of Day: 11:00 am-1:00 pm

Service Type: Dog Walk

Sitter: Ashley

Pets: All Pets

Copy To: Template

Time Frame	Copy	Exclude Last Day	Service Type
MIDDAY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Above Service Type
EARLY MORNING	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Above Service Type
LATE AFTERNOON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Above Service Type
LATE NIGHT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Overnight - 1 pet

**M T W Th F Sa Su**

Show More Details

(5) The copy template will now display as seen in the image above

(6) Your first four pre-defined time windows will be displayed in the Time Frame column

(7) Check all the boxes in the **Copy** column

(8) Check all but the **Early Morning** box in the **Exclude Last Day** column

- (9) Change the **Service Type** for **Late Night** row to **Overnight** – 1 pet (or equivalent service type)
- (10) Leave all the days of the week checked (**M-T-W-Th-F-Sa-Sun**)
- (11) Click the **Add Visit** button. Your schedule of visits will be created.

January				
Monday	Tuesday	Wednesday	Thursday	Friday
<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
3 visits.	4 visits.	4 visits.	4 visits.	1 visit.
<input checked="" type="checkbox"/> 11a-1p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 6a-9a Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 6a-9a Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 6a-9a Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 6a-9a Dog Walk <input checked="" type="checkbox"/> Ashley
<input checked="" type="checkbox"/> 3p-5p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 11a-1p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 11a-1p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 11a-1p Dog Walk <input checked="" type="checkbox"/> Ashley	
<input checked="" type="checkbox"/> 9p-11:59p Overnight - 1 pet <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 3p-5p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 3p-5p Dog Walk <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 3p-5p Dog Walk <input checked="" type="checkbox"/> Ashley	
	<input checked="" type="checkbox"/> 9p-11:59p Overnight - 1 pet <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 9p-11:59p Overnight - 1 pet <input checked="" type="checkbox"/> Ashley	<input checked="" type="checkbox"/> 9p-11:59p Overnight - 1 pet <input checked="" type="checkbox"/> Ashley	



## How to... Create and Edit Ongoing Schedules

### Create a simple one-sitter ongoing schedule

- (1) Find the Client you want to create an ongoing schedule for
- (2) In the **Services** tab, click the **New Ongoing Per-visit Schedule** button
- (3) Set a **Start Date**
- (4) Set the **Days of the Week** that the ongoing service will occur
- (5) Set the **Time of Day** (if different from your default time window)
- (6) Set the **Service Type**
- (7) Set the sitter who will provide the service
- (8) Click Save

### Create an Ongoing Schedule where one of more sitters provide service on different days

- (1) Follow the steps for (1), (2) and (3) above
- (2) For **Days of the Week**, set the pattern for one sitter (e.g. John is Tu-Th)
- (3) Set the **Service Type** and **Pets**
- (4) Click the **Add Another Service** button
- (5) Set the **Days of the Week** for the other sitter (e.g. Sue is M-W-F)
- (6) Set the **Service Type** and **Pets** (can be the same as for John)
- (7) You have set up the same service pattern but on M-W-F Sue provides service, on T-Th, John provides service
- (8) Click **Save**

### Modify sitter on an Ongoing schedule

- (1) Find a client
- (2) Click **Edit** for the **Ongoing Schedule** (will be in the **Ongoing Schedule** section of the Services tab)
- (3) Set an **Effective Date** (this is the date that the changes should first be applied)
- (4) Change to a new sitter with the drop down box
- (5) Click **Save**

### Modify service on an Ongoing schedule

- (1) Find a client
- (2) Click **Edit** for the **Ongoing Schedule** (will be in the **Ongoing Schedule** section of the Services tab)
- (3) Set an **Effective Date** (this is the date that the changes should first be applied)
- (4) Change to a new **Service Type** with the drop down box
- (5) Click **Save**

### Modify time window on an Ongoing schedule

- (1) Find a client
- (2) Click **Edit** for the Ongoing Schedule (will be in the **Ongoing Schedule** section of the Services tab)
- (3) Set an **Effective Date** (this is the date that the changes should take place)
- (4) Click on the box in the **Time of Day** column for service whose time you wish to change.
- (5) Use the time window editor to choose a time window and click **Done**
- (6) Click **Save**

### Cancel an Ongoing Schedule

- (1) Find a client
- (2) Click **Edit** for the Ongoing Schedule (will be at the bottom of the **Client > Services** tab)
- (3) Go to the **Cancel Schedule On:** box and enter a date
- (4) Click **Save** and all the visits on that and later will be deleted

### Uncancel an Ongoing Schedule

- (1) Find a client
- (2) Click **Edit** for the Ongoing Schedule (will be in the **Ongoing Schedule** section of the Services tab)
- (3) IMPORTANT: If you are making any changes to the schedule (**Time of Day, Service Type, Sitter, Days of the Week**), make sure you do this before clicking the **Uncancel** button.
- (4) Be sure to set an **Effective Date** unless you want the **Uncancel** to occur immediately
- (5) Then click the **Uncancel** button

### Suspend an Ongoing Schedule

- (1) Find a client
- (2) Click Edit for the Ongoing Schedule (will be in the **Ongoing Schedule** section of the Services tab)

(3) At the bottom of the page, enter a date in the **Suspend Service On:** and **Resume Service On:** fields

(4) Click **Save**

## How to... Bill Clients

### Send an Invoice to a Client

- (1) Go to **Clients > Billing**
- (2) Set the date range for which you would like to invoice
- (3) Click the **Show** button
- (4) This will display the total amount owed by each client for visits, surcharges, and miscellaneous charges in the specified period
- (5) Click on the **SEND** button next to a client that you want to send an invoice

Account Summary		Customer Number: 660
Joe Client		Current Charges \$ 51.00
No Address On Record		Tax \$ 0.00
		Prior Charges \$ 17.00
		Payments & Credits \$ 0.00
		<b>Amount Due \$ 68.00</b>
		Date Due Upon Receipt

Prior Unpaid Charges				
Date	Time of Day	Service	Sitter	Charge
01/12/2011	12:00 pm-2:00 pm	Dog Walk	Andrew Puglisi	\$ 17.00
				<b>Subtotal: \$ 17.00</b>

Charges to be Prepaid				
Date	Time of Day	Service	Sitter	Charge
01/17/2011	12:00 pm-2:00 pm	Dog Walk	Andrew Puglisi	\$ 17.00
01/18/2011	12:00 pm-2:00 pm	Dog Walk	Andrew Puglisi	\$ 17.00
01/19/2011	12:00 pm-2:00 pm	Dog Walk	Andrew Puglisi	\$ 17.00
				<b>Subtotal: \$ 51.00</b>

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

Recent Payments and Credits			
Date	Type	Reason	Amount
01/17/2011	payment	Prepayment payment received	\$ 221.00

- (6) Review the invoice which appears and click the **Email This Invoice** button in the upper left hand corner of the page
- (7) An email composer opens. Use this opportunity to write a personalized message or insert an email template before sending. **Click Send Message** to send it to the client.

### Send Invoices to Batch of Clients

- (1) Go to **Clients > Billing**
- (2) Set the date range for which you would like to invoice
- (3) Click the **Show** button

- (4) Check the box next to each client that you want to send an invoice to or click **Select All**

	Client	Invoice Status
<input type="checkbox"/> No Email	<a href="#">Miguelina S. Aldridge</a>	<input type="button" value="Send"/>
<input type="checkbox"/>	<a href="#">Julianne Archey</a>	<input type="button" value="Send"/>
<input type="checkbox"/> No Email	<a href="#">Yu Augustine</a>	<input type="button" value="Send"/>
<input type="checkbox"/>	<a href="#">Aubrey Bartlett</a>	<input type="button" value="Send"/>
<input type="checkbox"/>	<a href="#">Rudy Bastian</a>	<input type="button" value="Send"/>

- (5) Click the **Generate & Email Prepayment Invoices to Selected Clients** button

### Set up Credit Card Processing

- (1) Go to the **Billing** section in **ADMIN > Preferences**
- (2) Select a Gateway Processor
- (3) Type in your Merchant Key and Merchant Password (if you do not know what this is please contact [support@leashtime.com](mailto:support@leashtime.com) or your Gateway representative)
- (4) Click **Save**
- (5) In the same window, indicate which credit cards you accept

### Enter Credit Card Information for Client

- (1) Search for a Client
- (2) Go to their **Billing** tab
- (3) Click the **Edit Credit Card Info** button
- (4) Type the appropriate fields in the popup window
- (5) Note that we automatically designate clients as **Auto-Pay** set to Yes (this allows you to process credit card payments for clients without their prior authorization each billing period)
- (6) Click **Save**

### Run batch credit card transactions

- (1) Go to **CLIENTS > Billing**
- (2) Set the start date and end date for which you would like to process invoices and payments
- (3) Click **Show**

- (4) In the list below, select clients for whom you would like to process payments
- (5) Click the **Charge Selected Clients** button
- (6) LeashTime will process each individual credit card and update their status on the page
- (7) After a credit card transaction has been complete (whether successful or failure, LeashTime will log the transaction details in the **BILLING** tab of the client's profile)

#### **Issue a credit to a client**

- (1) Search for a client
- (2) Click the **Account** tab
- (3) Click the **Credit** button
- (4) Type in the amount and note the reason for the credit
- (5) Credits will immediately be applied to any unpaid visits or charges
- (6) Credits will be displayed on the next invoice
- (7) Click **Save Credit**

#### **Issue a refund to a client**

- (1) Search for a client
- (2) Click on the **Account** tab
- (3) Click the **Refund** button
- (4) By default, LeashTime will use up any credits that the client may have
- (5) You may unselect this option and simply issue a refund
- (6) Click **Save Refund**

## How to... Manage Sitter Payments


### Pay sitters

- (1) Go to **SITTERS > Payroll/Commissions**
- (2) Set the start and end date
- (3) LeashTime will calculate all the payables due to each of the sitters
- (4) Review the detailed pay statements by clicking on the total amount in the **Pay** column
- (5) If you have check or e-funds transaction numbers, you may type them into the **Check/Transaction ID** column
- (6) Click **Pay Selected Sitters** button
- (7) LeashTime will record the pay statement to the sitter's **Pay History (Sitter > Sitter List > Sitter name > Pay History)**

### Add a Bonus to a Paycheck

- (1) Follow steps 1 to 3 above
- (2) Type in a bonus amount in the **Bonus** field
- (3) Click the mouse anywhere outside the **Bonus** field
- (4) The **Check Amount** will be recalculated
- (5) Click **Pay Selected Sitters** button

### Mark Visits Complete to Update Payroll

- (1) If there are visits that have not been marked complete during the pay period defined, they will be listed above the Start and End Date boxes
- (2) Click the link "**Click here to review them**"
- (3) A window will popup
- (4) Mark appropriate visits complete
- (5) Click the  in the lower right corner of the window when you are done
- (6) You will be returned to the Sitter Payments / Commission page and payables to sitters will be updated

### View previous payments to sitters

- (1) Go to **SITTERS > Sitter List**
- (2) Select a Sitter

- (3) Go to the **Pay History** tab
- (4) Select date range and click **Show**
- (5) LeashTime will display each of the pay statements.
- (6) Click on any link for a particular pay statement (each represents a pay-through date) and the details will be displayed

### **Modify Sitter Commission Rates**

- (1) Go to **SITTERS > Sitter List**
- (2) Select Sitter
- (3) Click **Pay**
- (4) Modify the pay rates for each of the sitter services
- (5) In the **Pay** tab, click on **Apply Pay Rates**
- (6) Set the first date for which you want the new pay rates to be effective
- (7) Click **Show Visits**
- (8) Click **Select All Visits** (or the visits you want to change) and click **Apply Rates**



## How to... Manage Keys

### Initially define key safe locations (your office or where you keep backup keys)

- (1) Go to **KEYS > Key Safe Manager**
- (2) In the **Label** field, type the name of your office (or location for backup keys). For example, "Springfield Office".
- (3) Check **Active**
- (4) Repeat for any other locations where you store keys.
- (5) Click **Save Key Safes**

### Initially define number and location of keys

- (1) Find a client
- (2) In the client profile, go to the **Home Info** tab
- (3) In the **Keys** subsection, go to the **Copies** dropdown and select number of key copies
- (4) Tell LeashTime the total number of keys that you have (if you do not know, you can always modify this later, so do not worry if this is incorrect or inaccurate)
- (5) An appropriate number of dropdown lists will appear that allow you tell us who has the keys. Pick the appropriate sitter or location (if you do not know who has the key, just do not make a selection)
- (6) Click **Save**

### View a list of all keys held by a sitter

- (1) Go to **KEYS > Sitter Keys**
- (2) Select a Sitter
- (3) LeashTime will display a report showing the keys in their possession

### Indicate no keys are needed for a client

- (1) Go the client profile, **Home Info** tab
- (2) In the left column, about halfway down, check the box **No Key Required**
- (3) Save Changes

### Ask your sitters to confirm possession of keys

- (1) Go to **KEYS > Key Audit**
- (2) Select the sitters whom you would like to send email to with a key report

(3) Click **Send Audit Email to Selected Sitters**