The Monthly Poop

Learning to Learn

New Released Features

Visit Arrival/ Completion Report for Mobile

See report of all arrivals and completions for sitters (if using the mobile app) in **ADMIN > Reports > Sitters > Arrival / Completions**

Filters Added to List of Clients

You can now filter your client list based on flags and other attributes. Go to CLIENTS > Client List.

Report of Petsit Start and End Dates

See Pointers section in this issue, below.

Known Issues / Bugs:

Firefox 14 update -- this is an update that some of you may have done. We have not tested all functions in this new version.

Firefox and Safari on the Mac: Saving EZ Schedules and/or copying appointments can take a really long time. Use Chrome instead.

A couple of years ago, I read this great book, *Alex & Me*, by Irene Pepperburg. It detailed her attempts to teach an African Grey parrot to not only speak but learn complex concepts such as how to quantify things. When Alex was presented with a tray containing 4 green, 3 red and 5 blue blocks and asked "What color five?", he would respond "blue."

Much like Alex the Parrot, we are all learning to learn. We are constantly learning about your needs to improve the LeashTime experience. And you are learning how to effectively use LeashTime to help you improve your business.

The last four years have been great. It seemed like all the stars lined up -- Matt and I knew what we were doing. We had seen so many mistakes in starting businesses and introducing new products. If you make poor decisions that seemed good in the short term, you would suffer consequences for the long term. We weren't going to take any shortcuts or exaggerate our capabilities or sell vapor-ware dreams of the future.

We set out to create a rock-solid product and we were not going to rush anything. Any capabilities we built into the product had to be thoroughly analyzed and scrutinized. We knew we would make mistakes, even though we were committed to meticulous review and testing. So far, we feel like we accomplished what we set out to do.

Our growth over the last 12 months has been phenomenal and chaotic. We recognized that the two of us could no longer provide the level of quality that we set out to provide. We needed help. We brought on Jody Smith earlier this year and she has worked out wonderfully.

With a flood of new clients, each with their own unique perspective on how their LeashTime world should be, we had to change too. We were learning new things every day about your needs. But we were also learning how we should approach making those changes.

It used to be that we could turn on a dime and make changes and improvements to the system. With fewer features, it is easier to avoid odd side effects. With fewer users, it is easy to manage the side effects that do occur. We could explain everything in detail and make sure each person understood the what, where and why.

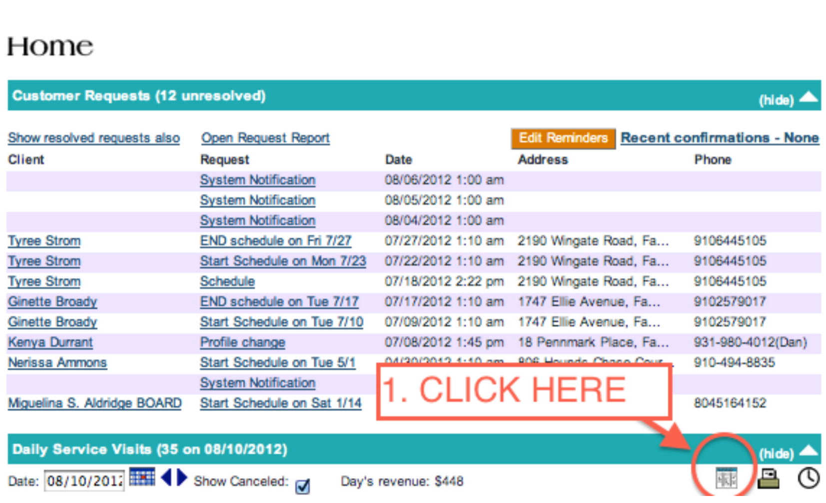
Now, making changes is more complex. There are a large number of interactions that can cause something to break (regression testing). We realize that making changes to the system can have consequences we did not envision.

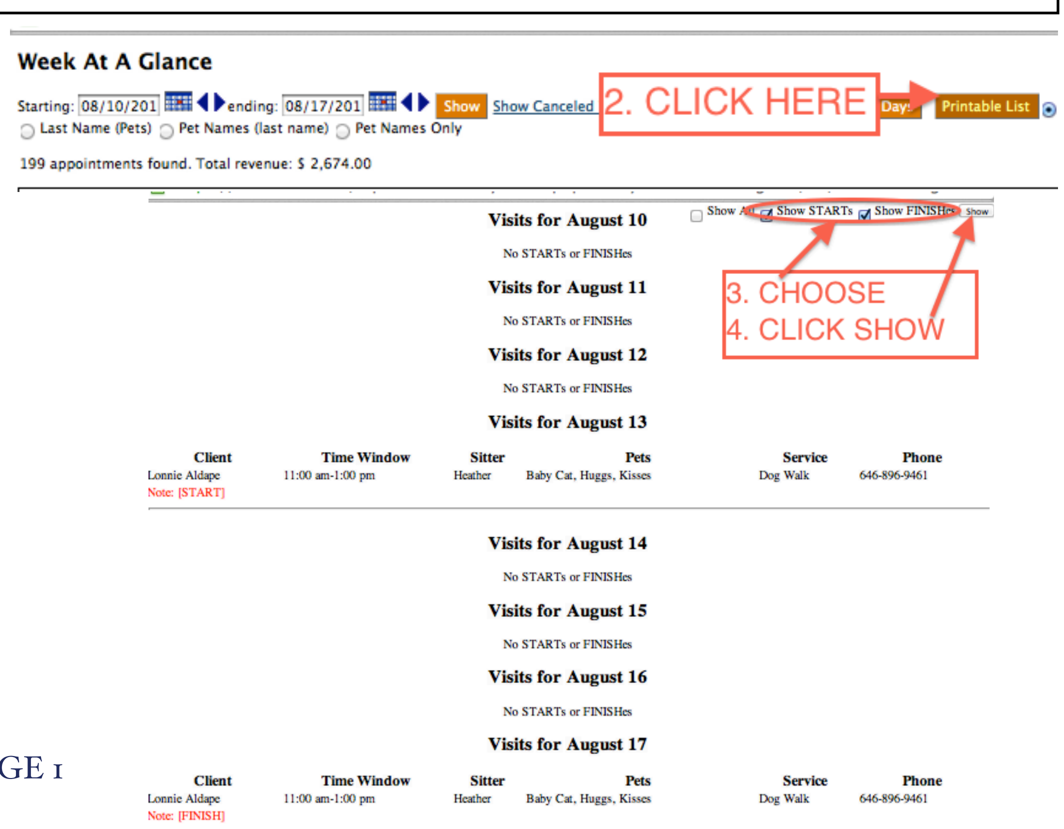
We have to make sure that everything works properly and works under numerous usage scenarios. We are adapting and we have a very large list of new features and refined user interfaces that we will be working on for the remainder of the year. We want to start checking things off of our to-do list for new and improved LeashTime features.

Thank you again for providing great feedback and being patient. We cannot guarantee that we will make 100% of all the requested changes. But we can guarantee that we will thoroughly evaluate whether we should make the change and, if so, how we should do it.

POINTERS (NOT THE DOG BREED)

LIST OF PETSITS BY START DATE OR BY END DATE





Basics of Billing

Preview of New Billing

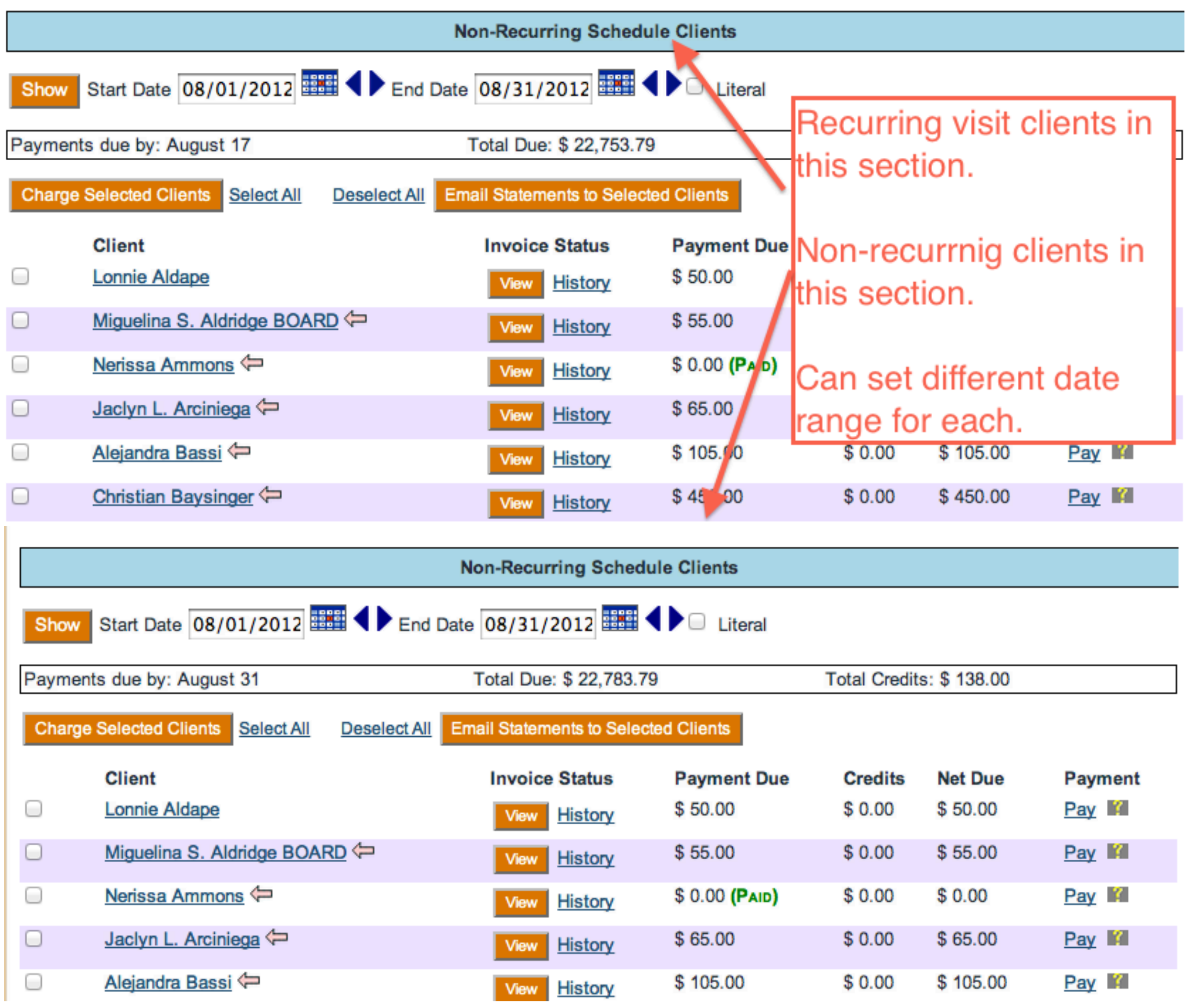
In the near future, we plan to release a major revision of our billing functionality that will, hopefully, address some of the confusing scenarios that some of you have seen.

Why haven't we tested and released this yet? There are a few reasons:

- Our current billing is not "broken". Most of the time, there are no issues. But, depending on how varied your billing practices are, things can sometimes be confusing. All of the calculations are correct, but it seems that everyone has a differing interpretation of the result of the calculations. Nevertheless, there are solutions to clear up the confusion, albeit, inconvenient.

- Replacing one billing system with quirks with another billing system with a different set of quirks isn't helpful.

- We need to make sure it works.



Despite the quirks in our current billing system, we can count on it to calculate and account for things correctly. You may believe that our foremost design goal is to make things as clear and intuitive for you as possible. This is not the case. Our number one design goal is to ensure that WE CAN RELIABLY SUPPORT YOU, with ease-of-use and intuitiveness a very, very close second.

The biggest issue in billing is that most of you typically have different billing policies for recurring clients and petsitting clients. Typically, recurring clients would be billed on the 29th of the month for the following month's scheduled services, while Petsitting clients owe the entire amount for scheduled visits prior to the start of the first visit.

There is no distinction made in **CLIENTS** > **Billing** between recurring clients and petsit clients. This can cause problems and confusion for you because you want to apply different billing policies to each group. So, you have to remember whether a client is a petsit client or recurring client and if the amounts being calculated are correct.

This is further exacerbated by a key assumption that LeashTime makes with regard to petsit clients. We assume that if the schedule of petsits began prior to the start of the current billing period but ends in the current billing period, that you do not want to bill this client and we suppress the schedule from billing. Sometimes, this is exactly what you want (if you actually did invoice them in a prior period and received payment for the visits). But when it isn't, it is very confusing.

The screenshots to the left show you what the new billing page will look like. There are several minor enhancements such as showing the total amount of revenue for each category of clients (recurring and petsit). You will notice in the Non-Recurring Schedule listing, there are arrows next to some of the client names. These indicate whether or not the schedule started prior to the defined billing period (8/1/2012). If it has, then you may not want to bill in this current billing period. Each section has a Literal checkbox. This will allow you to override any rules about display of visits and literally show all the visits between the start and end date.

Our goal was to design more flexible billing tools that were more intuitive for you to use. Hopefully, we get it right.

Summary of New Billing Changes

Change	Explanation
Segregate Recurring clients from Petsit clients in billing views	Often, you will have different billing policies for these two groups of clients. A typical scenario is to bill recurring clients on a regular interval (e.g. monthly or weekly). Putting both of these in the same list, without distinguishing between the two is confusing. We now separate them so that you can manage different billing policies for different types of clients.
Show all visits for Petsit	There were some quirky rules about showing a petsit schedule in CLIENTS > Billing if the petsit schedule began prior to the billing date range. We would not show all the visits because we assumed that you had billed for the entire schedule in the previous billing period.
Ability to see account history for each client in CLIENTS > Billing	For each client, you will be able to click a History link to pull up an account history to see if / when you have previously sent them an invoice.

Mobile Update

Many of you use the mobile version of LeashTime to manage visits for sitters. We recently ran a report and found that there were 100,000 unique logins for mobile sitters since we released mobile capabilities. This has been tremendous and we realize that a robust mobile solution for LeashTime is important for your long term plans. Let's talk about some of the things mobile is not:

There is no mobile version of LeashTime for managers/owners. Some of you may login on your iPhone and Android as managers but you will see the normal LeashTime site. You will have to pan and zoom to view LeashTime. This can be useful and helpful but we have done nothing to customize the mobile experience for managers.

The iPad is not officially supported (yet). We are making changes for the iPad platform to correct problems we are aware of.

The sitter version of LeashTime is a web app, not a native app. You won't be able to search for it in the app store.

We have ample documentation on how to use mobile (http://training.leashtime.com). The real question is what is on the the horizon for mobile?

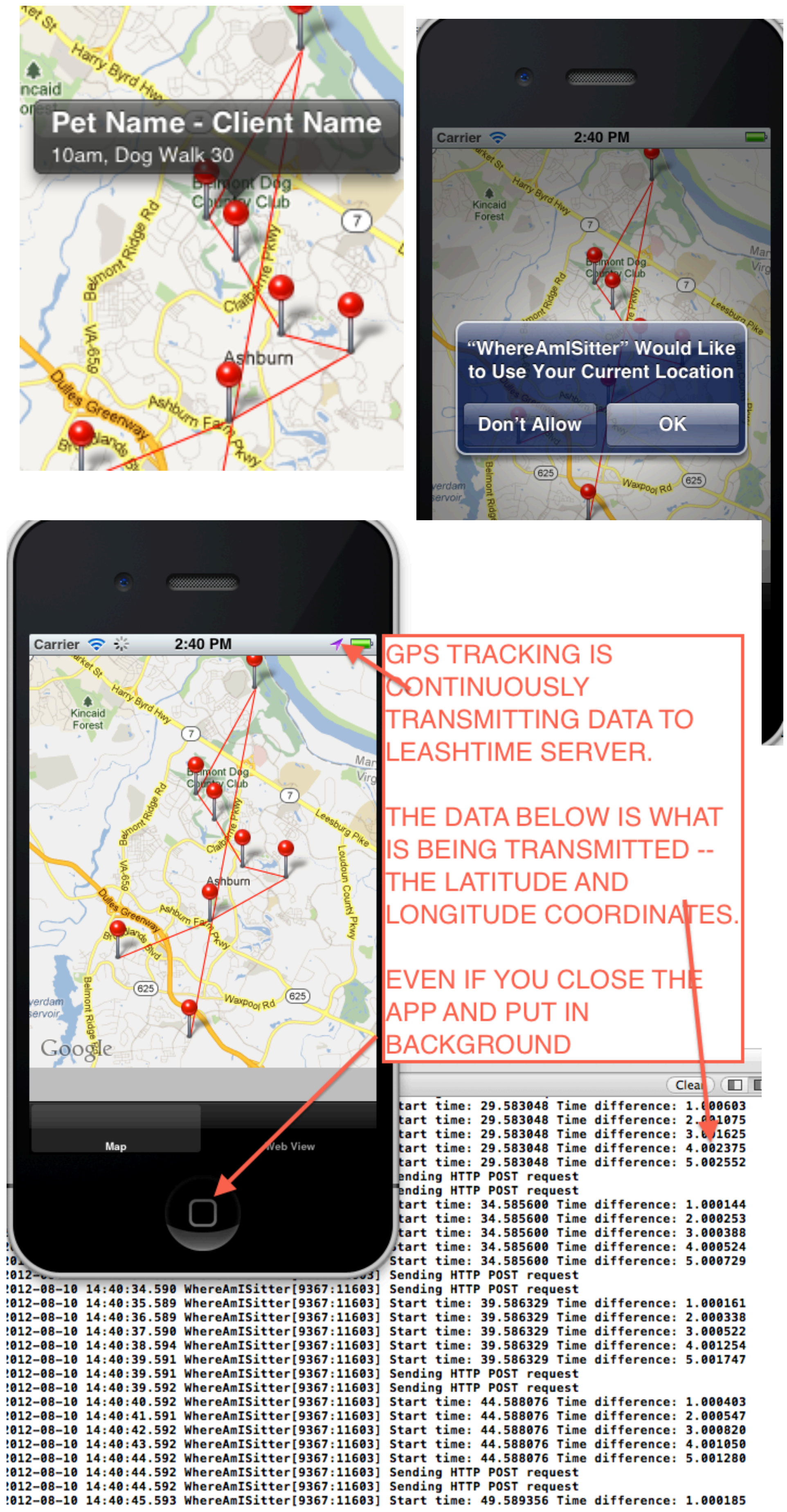
We have built and experimented with native mobile apps for iPhone for both sitters and managers. Some of the things we are considering in a native version release include:

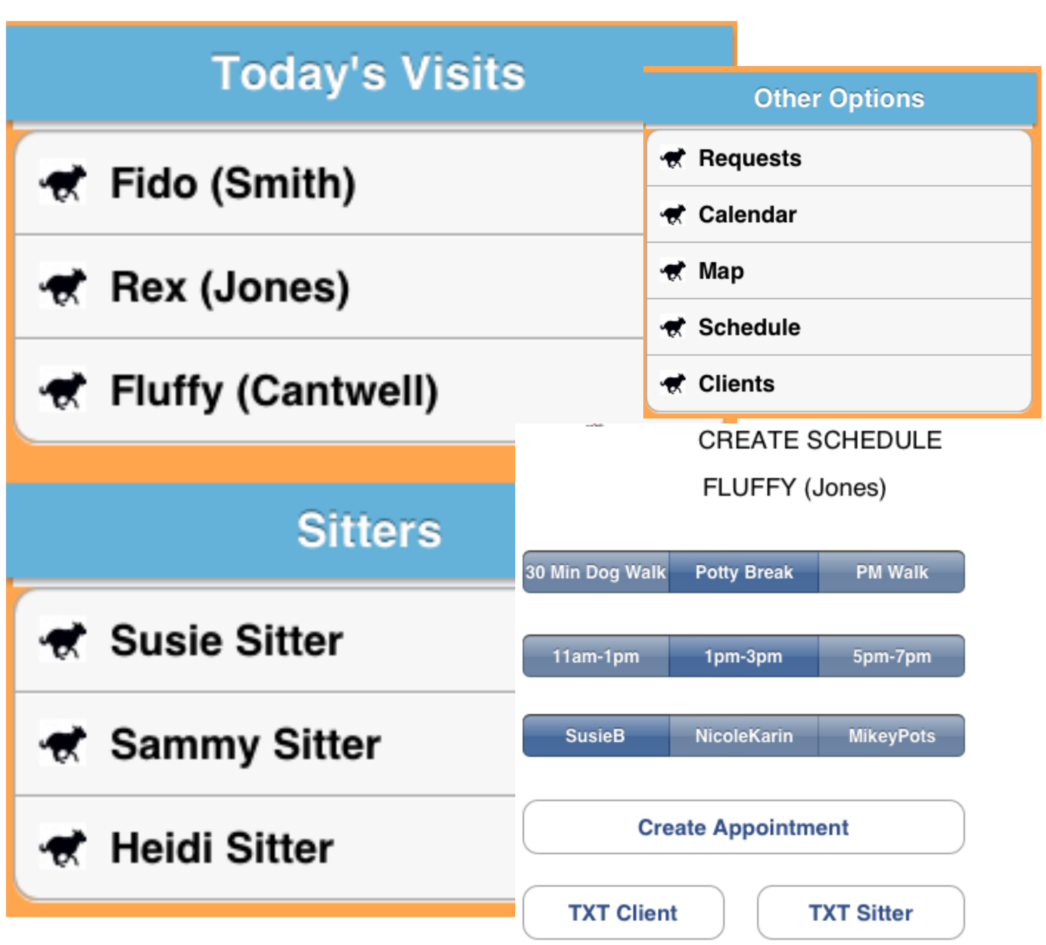
- Offline backup (to your phone) of client, visit, sitter data
- Sync with the local address book on your iPhone.
- Sync with the local calendar on your iPhone.
- Real-time GPS tracking for sitters, with intelligence (e.g. auto-detect when they enter a zone for a client and then when they leave the zone indicating start and end times so they don't have to mark arrive / complete).
- Generate and log text message confirmations and changes sent to sitters and to clients.

We want to avoid re-inventing the wheel on the mobile platforms. Instead, we would like to focus on leveraging the unique aspects of the mobile platforms to enhance your experience rather than recreate your experience.

The screenshots to the right show the mobile sitter native app and manager app prototypes. The sitter app allows you to track the sitter GPS coordinates in realtime. You would be able to set the tracking interval (e.g. every 5 seconds, 10 seconds, 2 minutes, etc...). This app would still run while in the background. So if they close the app down to do something else, we would still be tracking and transmitting coordinates. The screenshots in the bottom half of the page begin are prototypes for the manager app.

We will keep you posted on mobile application developments. We want to hear what your feedback is on how we should prioritize this development.





Tutorial: Sending Emails - Part Two

Last month, we showed you how to set up and send out a client email to confirm a schedule from the client's Services tab. This month, we will show you how to send out a batch of emails from the **CLIENTS** > **Email / Alerts**.

If you go to **CLIENTS** > **Email / Alerts**, you will see a list of all the clients in your database that you can send email to. You can select individual clients and send them a templated email. If you are unfamiliar with a template, it is basically a mail-merge. You write a generic message, including using tokens (more on tokens and templates later). You can then utilize the templates to send out mail messages to a specific client or group of clients.

One of the first things you will notice in the **CLIENTS > Email / Alerts** page is that your entire list of customers are listed. Generally, you want to send a message to a specific group of clients. For instance, you may need to send a message to only your cat clients or only your recurring clients. Further, you may only want to send messages to these clients if they have upcoming visits in a specific date range. To accomplish this, you would use **Filter Clients**.

Click on the **Filter Clients** link. A popup will appear that allows you to filter the client list and send them a templated email. The first thing you probably want to do is click the Active radio button. Next, you will want to tell LeashTime you only want clients who have visits within a particular **Starting** and **Ending** date range. Finally, you may want to filter clients by some attribute. You would select individual flags to filter on in the **Flagged as follows** section. You will also tell LeashTime the type of flag matching you would like (e.g. **All of the selected** flags, **Any of the selected** flags). Click **Find Clients** and LeashTime will generate a list of clients who match the filter criteria.

In my example, I have filtered clients who have visits between 8/13/12 and 8/31/12 and have been flagged as recurring. There are three clients who meet this criteria. Now, we want to send these clients an **Upcoming Schedule** templated email. We go to the right side of the screen and choose **Upcoming Schedule** from the **Templates:** dropdown. We then tell LeashTime, date range of visits we want to display in the schedule by setting a Starting and Ending date. Then, we click Select All Active at the top of the page and click the Send Email to Selected Clients button. Each of our filtered clients will receive a personalized email message with their schedule of visits.

Email Templates

LeashTime has standard email templates for common communication scenarios. To view and edit these templates, go to **ADMIN** > **Client Management** > **Email Templates**.

You will see a list of some pre-defined templates. You can and should edit each of the templates and write your own custom messaging. To edit a template, click on the name in the Template column. Modify the text as you wish and make sure to save it.

Typically, you will want to create your own templates. Examples of templates you might create are:

-How to Access Your Online Account

-Booking Deadline for July 4th Holiday

-Initial Meet n Greet

You can create templates to send to sitters or to clients. We will walk through an example for creating a template for clients.

1. Click **Add New Template**
2. Type Initial Meet n Greet in the **Label** field
3. Click the **clients** radio button
4. Type Meet n Greet with Running Dog in the **Subject** field
5. Type the following message in the **Body of Email** field:

```
#LOGO#

Dear #FIRSTNAME#,

We are looking forward to meeting you on August 30.

Thanks,

Team Running Dog
```

Make sure you check the **Active** box (at bottom of message) and click **Save Template**. Congratulations, you have created your first email template. You can select this template anywhere in LeashTime and send a personalized message out to a client. We had referenced tokens earlier in this article. Tokens are just placeholders that allow you to replace a generic reference with a specific information. In the above template email, #FIRSTNAME# is a token that tells LeashTime to pull the first name field for this client and replace #FIRSTNAME# with the actual client's first name. This allows you to personalize a message without having to hand type the clients name for each message.

We hope that you find email templates to be powerful and useful!