



The Monthly Poop

SUPPORT POLICIES

support@leashtime.com
703-996-3084

Monitored 7 days a week.

- (1) **ALWAYS** email support@leashtime.com
- (2) Email support to set up a time to talk by phone. Let us know your available times to talk.
- (3) If the support issue is urgent, type **URGENT** in all caps in the subject line.

BILLING POLICIES

- (1) Automated payments process on 15th of month.
- (2) You will receive an invoice preview prior to processing.
- (3) You only pay for sitters that have worked in a given month period, not for sitter accounts.
- (4) We will credit your account if you only have a few visits that pushed you into a new price tier. **YOU MUST REQUEST THIS CREDIT.**
- (5) Account access will be automatically restricted if the account is not paid in full by the last day of the month of the billing period.

Same as we've always been

When we started out with LeashTime, we had only two or three clients, and they made lots of suggestions. When a good suggestion came in, we were right on it and we would often implement the new feature or change right away. It was exciting for us and gratifying to our customers.

This worked fine most of the time, but sometimes we broke something. Either way, it was all right; we discovered any side-effects pretty quickly (because the system was simpler) and got them fixed right away. We would get a phone call or email or two, we would fix the problem, and then we'd be back to the usual routine. Little harm was done overall, and each time the service grew a little more capable.

As more businesses have signed up with LeashTime, things have gotten more complicated. When we make a change that accidentally breaks a commonly used page, we hear about it quickly, with the undercurrent of alarm. In the space of a few minutes after making a blunder, we might get dozens



of emails reporting the problem. Instead of inconveniencing a handful of businesses, we run the risk of affecting hundreds of businesses and thousands of schedules.

So we have gotten much more methodical about making changes to LeashTime to reduce the risks involved. We have to ask ourselves a few questions:

- How many users will be affected if the new feature does not work? Is it isolated?
- What existing features might be affected?
- If the change breaks something, how significant will the disruption be? Will users just work around the problem or will it stop them?

● Does the change require much advance notice? Will it cause mass confusion and a flood of reports?

And, because no two businesses are run exactly the same way, we have to ask:

● How many customers will say that they liked the old functionality better?

● Where should the new functionality be made accessible, and how can it be added?

● How much explanatory material will we need to produce to make the new functionality comprehensible?

So the pace of change in LeashTime has slowed down a little to minimize risks and maximize the benefit to LeashTime subscribers. We still get excited at the thought of improving the service and adding new features, but we have to be very deliberate.

So keep those suggestions coming. We won't guarantee immediate implementation, but each one is a potential piece of an ever-improving LeashTime.

Enable Client Pay Online (without storing their credit card)

- (1) Make sure you have Beta Billing enabled and Pay Now link turned on (contact support if you do not have options set)
- (2) Go to **Admin > Preferences > Billing Preferences** and make sure that Pay Now Link is checked
- (3) Click **Include a "Pay Now" link in invoices**
- (4) Change the option to **YES**
- (5) Click the **Save Include a "Pay Now" link in invoices**
- (6) The next time you send an invoice a link to pay now will be included

Invoice Date: 02/10/2014
Amount Due: \$ 53.07
[Click here to Pay Online](#)

You have no credit card on record with us.		Account: Ted (TEST) hooban
Pay With a Credit Card: <input type="checkbox"/>		Description: Your Invoice Lake Minnetonka Pet Sitters
<input type="button" value="Pay"/>		Amount Due: \$ 53.07
		Pay: \$ <input type="text" value="53.07"/>

Beta Billing: Recurring Clients with EZ Schedules

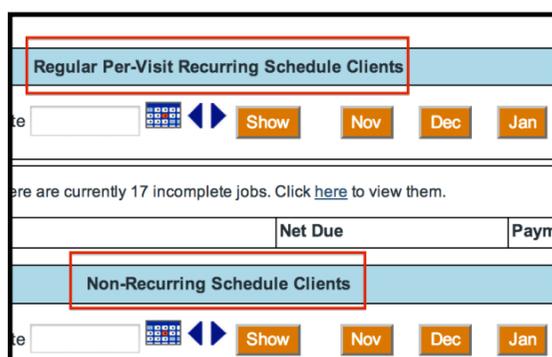
Beta Billing Review

In Beta Billing, **Regular Per-Visit Recurring** and **Non-Recurring clients** (petsit) are separated. Each group of clients can have their own start and end date billing periods. The typical reason for this is that two different billing policies will be applied to each group.

A client is non-recurring (petsit) if they have been scheduled with an **EZ Schedule**.

A client is recurring if they have been scheduled with the **Ongoing Per-Visit Schedule**.

If the client has both types of schedules active, they are considered **Regular Per-Visit Recurring** and will be in the first section of the Billing page.



THE ISSUE

So far, so good. The clients are logically separated based on different billing policies likely to be applied.

However, there is a problem. Some of your clients are likely recurring but they have an inconsistent pattern of scheduling. For instance, if they get walks from you 2 - 3 times every week, but you do not know which days they are until the Sunday beforehand. For these

PROBLEM:

Some clients are “recurring” but do not use the recurring schedule tool. Instead, they schedule with EZ Schedule tool.

clients, you would correctly use an **EZ Schedule** to schedule their visits week to week.

The problem is that the billing system will treat them as if they are Non-Recurring clients when they are not. The solution: use **BILLING FLAGS**.

Billing Flags are similar to the flags that you may already be familiar with in the system. However, there are 5 dedicated billing flags numbered 1 through 5.

Billing your standard recurring clients (defined as those who use the **Ongoing Per-Visit Schedule** editor) is straightforward. Go to the first section of the Billing page and click the month for which you would like to bill. In this particular example, let's bill for February. LeashTime will then calculate the total billables for each of the recurring clients, any payments that could be applied and the net amount due. If there are any discounts or taxes, LeashTime will factor those in as well.

Before we can bill ALL the recurring clients, we will want to flag them. Although you may use any flag to designate your recurring clients, we recommend using the number one (“1”) flag.

- (1) Go to each client profile and apply the 1 flag.
- (2) To add a flag in the client profile, click on “**Click to enter flags**” text next to the client name in the client profile.
- (3) If you have already added flags for the client, there will be no text but images for the flags already applied.
- (4) Just click on the images to open up the flag editor and apply the billing flag and save.

	Client
<input type="checkbox"/>	Jack Carter 1 2
<input type="checkbox"/>	Rick Castle 1
<input type="checkbox"/>	Andy Cohen 1
<input type="checkbox"/>	Douglas Fargo 1
<input type="checkbox"/>	Molly Feeney 1
<input type="checkbox"/>	Ted Hooban 1 2
<input type="checkbox"/>	Irv Johnson 2
<input type="checkbox"/>	Judith Johnson Click to enter flags
<input type="checkbox"/>	Kathy Norton 1
<input type="checkbox"/>	Tom Thumb 2

Once you have flagged your recurring clients, you can now filter by that flag in Billing to uniformly apply a single billing policy.

- (1) In the **Regular Per-Visit Recurring** section, click the February button (or set the date range to 2/1/14 to 2/28/14 and click Show).
- (2) In the **Non-Recurring** section, check the Literal option and then click the February button.
- (3) At the top right of the page, you will see the Billing Flags.
- (4) Click the 1 flag and both the Recurring and Non-Recurring lists will be filtered.

Why do you have to click on Literal Mode in the non-recurring section?

Because the default behavior of the non-recurring section is to include all visits on a bill even if the schedule begins or ends outside of the date range you have set.

In general petsit clients are billed for the entire schedule without regard to fixed billing periods (e.g. if the petsit schedule began on January 28 but ends on February 4, you generally want to bill for all these visits rather than splitting the bill among two billing periods).

The **Literal Mode** checkbox overrides this behavior. When checked, only visits in the date

range are included in calculating amounts due. and only visits that are literally within the given billing period date range will be used to calculate the invoice total.

Flag all Recurring Clients with Billing Flag 1 (you may use the flags as you wish, but this is standard usage)

Go to **CLIENTS > Beta Billing**

Set date range in Recurring section. Click Show.

In Non-Recurring Section, **click Literal**, set date range and click Show.

Click the number 1 billing flag.

You have a comprehensive list of all recurring clients, regardless of scheduling method.

Billing Show: **All Clients** 1 2 3 4 5

Regular Per-Visit Recurring Schedule Clients

Start Date 12/01/2013 End Date 12/31/2013 Show Nov Dec Jan Literal

Payments due by: December 31 Total Due: \$ 6,236.14 Total Credits: \$ 2,981.14

There are currently 17 incomplete jobs. Click [here](#) to view them.

Charge Selected Clients Select All Deselect All Email Statements to Selected Clients

Client	Invoice Status	Net Due	Payment
<input type="checkbox"/> Jack Carter 1 2	View Last sent: 11/12/2013	\$ 0.00	Pay ?
<input type="checkbox"/> Rick Castle 1	View Last sent: 11/16/2013	\$ 0.00	Pay ?
<input type="checkbox"/> Andy Cohen 1	View Last sent: 11/16/2013	\$ 462.50	Pay ?
<input type="checkbox"/> Douglas Fargo 1	View Last sent: 11/12/2013	\$ 296.00	Pay ?
<input type="checkbox"/> Molly Feeney 1	View Last sent: 11/16/2013	\$ 680.00	Pay ?
<input type="checkbox"/> Ted Hooban 1 2	View Last sent: 11/16/2013	\$ 682.00	Pay ?
<input type="checkbox"/> Kathy Norton 1	View Last sent: 04/20/2013	\$ 0.00	Pay ?

Found : 10 recurring clients in 0.000006 seconds.
It took 0.332661 seconds to calculate totals.
Dumped table in 0.027837 seconds.

Non-Recurring Schedule Clients

Start Date 12/01/2013 End Date 12/31/2013 Show Nov Dec Jan Literal

Payments due by: December 31 Total Due: \$ 1,220.50 Total Credits: \$ 6.25

There are currently 17 incomplete jobs. Click [here](#) to view them.

Charge Selected Clients Select All Deselect All Email Statements to Selected Clients

Client	Invoice Status	Net Due	Payment
<input type="checkbox"/> Sheldon Cooper 1 2 ←	View Last sent: 10/09/2013	\$ 302.50	Pay ?
<input type="checkbox"/> Kathy Johnson 1 ←	View Last sent: 11/16/2013	\$ 296.00	Pay ?

Credit is my Friend

In LeashTime, you are able to issue “credit” to a client that is not linked to a credit card transaction or check. Often, if you are confident with using credits and their versatility, it can save you a lot of frustration and a trip to the support desk.

Credits are treated virtually the same as payments. They are applied to visit billables in the same manner (first-in, first-out). There are no limitations on how and when to issue a credit. One of the great attributes of credits is that you can easily VOID them. This reduces the risk of issuing a credit and realizing afterward that you should not have issued the credit.

WHEN TO USE CREDIT

- You miss or mess up a visit and need to show a gesture of good faith to the client, so you offer a credit for a “free walk”
- To fulfill service provided as part of a Groupon type promotion. Your promotion is spend \$50 and receive \$75 worth of service. In this case, you can issue a credit for \$50 and schedule \$75 worth of service.
- You forgot to apply a discount to a set of visits and now you need to correct the situation. Manually calculate the number of visits and the amount of the discount for each visit, multiply the two figures. Issue this amount as credit.
- You start LeashTime at a date certain, however, the client begins with a certain number of credits or prepayments that were recorded in your previous system.
- You mistakenly over billed a client because you had not set up their custom pricing, marking visit(s) complete, which triggered application of payment to the visit. While you could go back and modify visits that were incorrectly billed, this will create a lot of system generated credit entries. Instead, manually calculate the over billed amount and issue a credit for that amount to reconcile the account.

WHEN NOT TO USE CREDIT

- When you intend to Refund payment to a client
- When the system has auto-generated a credit
- When you cancel a visit. If the visit has not been paid for it is a non-event and no book-keeping is necessary. If the visit has been paid for, the system will automatically generate a credit (don't delete this).
- To address a sitter pay issue (e.g. sitter paid too much or too little). Sitter payables are independently managed and calculated in LeashTime.

Hopefully, these guidelines will help you better manage your client accounts and reduce your trips to the support desk.