![LeashTime logo] Leash Time — Sit. Stay. Prosper.™ — Professional Pet Sitting Software

The Monthly Poop

New Releases

Exclusive Visit Type
System can notify you that a service time block must be exclusively allocated.

Sitter Time Off Displayed in the WAG View

Pay Date Field Editable in SITTERS > Payroll / Commissions

Text Message Icon Available in Client's Own Profile Editor

Updated FAQs available on http://training.leashtime.com

Pointed in the Right Direction

We hope that you had a wonderful holiday season and have recovered from a busy period.

Thank you again for supporting LeashTime. We have some ambitious goals for the upcoming year that we hope will help make your experience much better.

This past year's growth was incredible. Frankly, it was almost more than we could handle. But there was little we could do to stop it since there was no marketing to "turn off" (because we do no marketing).

It was probably a "good problem," but a problem nonetheless. With the increased demands of getting people up and running and supporting them through their early phases, our team got spread thin.

We make an enormous investment of time and energy to make sure that people get off the ground right. We know if they can make it through the first 90 days successfully, they will be LeashTime converts and will require minimal support moving forward.

When you jam the pipeline with new clients and invest so much time and energy bringing them up to speed, there will be an inevitable negative impact somewhere else.

The somewhere else was in product development. We were spending almost all of our time bringing new clients onboard while at the same time trying to be responsive to your needs.

We have known about some quirks and specific weaknesses for quite some time, so we were anxious to change things in the product to improve your experience. In many cases, we actually made changes but we never released them. Currently, we have a backlog of about 50+ changes and features that are built but not fully tested.

We did manage to streamline and automate bringing new clients on board, which now takes a fraction of the time than it used to. We have developed startup checklists for new clients to ensure things go smoothly.

Now, we can turn our undivided attention to the long list of unreleased features and the promised rollout of our new billing system.

We hope that you have a fantastic new year!

POINTERS (NOT THE DOG BREED)

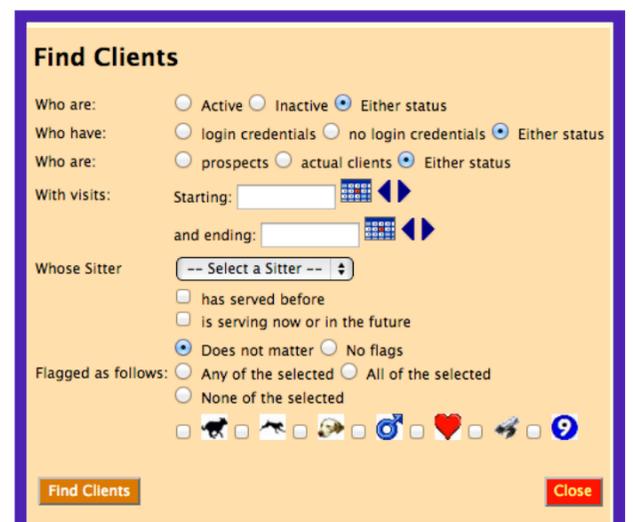### Filter and Export Client List

(1) Go to the **CLIENTS > Client List**

(2) Click **Filter**

(3) Set desired filter parameters

(4) Click **Find Clients**

(5) LeashTime will display a list of clients who meet the filter criteria. You may export this list to excel by clicking on the icon **Export List**.

BILLING: Vanishing Visits

If you have been reading our newsletters, you probably already know that we have been saying we are "working on new and improved billing functionality" for nearly a year. And it will make all your problems go away and you will never have another confusing billing scenario again... etc... It is true that we have been working on addressing a few of the confusing quirks about our billing system.

We are conducting intensive beta tests. Some of the brave users are sending live invoices and processing payments with the beta version of the new billing system. But the billing system is not out yet and we cannot reliably predict when it will be out.

We are going to cover a very common and frustrating scenario that causes much confusion. Although this advice will be obsolete shortly (when we release new version of Billing), there are some concepts in here that are good to know no matter what.

The scenario is as follows:

- Client is a recurring client

- Their schedule is sporadic

- Instead of using the recurring schedule tool, you request they submit their schedule online every week (or month).

- Client submits schedule for a month of visits

- You review and approve and it becomes an EZ Schedule

- The date range of their schedule is not the same as your billing period for recurring clients.

- You bill recurring clients weekly but the client has submitted a monthly schedule.

Let's review our current rules about EZ Schedule invoices:

- CASE #1: If the EZ Schedule start and end date are within the billing date range, then the ALL the visits for the month will show up in the invoice

- CASE #2: If the EZ Schedule starts within the date range but ends after the date range then all visits within the date range plus visits beyond the end of the date range will show up on the invoice

- CASE #3: If the EZ Schedule starts before the date range but ends within the date range, it may not show up

- CASE #4: If the EZ Schedule begins and ends prior to the start of the date range, then all visits will show up as Prior Unpaid

If you go to **CLIENTS > Billing**, it is Case #3 we are interested in and that causes confusion. The reason the visits do not show up is because we make the assumption that you had billed for the entire schedule in the previous billing period (see Case #2), therefore, you would not want to bill again for these visits in this billing period. This was an early design decision that has proven to be shortsighted. In some cases, this is exactly how you want the system to behave. In other cases, you want the system to interpret the schedule and billing cycle dates literally. In either case, the VISITS WILL ALWAYS GET BILLED. If the visits are invisible in the current billing cycle, as in Case #3, they will show up in your next billing cycle because all the visits will be considered past due. Of course, this is not a desired outcome either in some cases but it does show that LeashTime is keeping track of all the billables.

The next table shows you some things you can do to prevent and / or correct this situation:

Recommendation	Trade-off
When creating an EZ Schedule, try to ensure that the start date and end date of the EZ Schedule match the start date and end date of your billing cycle.	Inconvenient to create 4 weekly EZ Schedules instead of one monthly.
Set up a weekly recurring reminder to bill clients similar to the one described. After receiving reminder, go to existing EZ Schedule and change the start date to match the start date of your current billing cycle. Appointments prior to the start date will still be preserved, just not visible. LeashTime will now consider the new start date when creating invoices.	The best option, requiring just a little setup work. This is quick and easy but, obviously, another thing that you have to remember to do.

Some of you may not even know about the scenarios described above. Running into this situation will depend on your billing policies and practices. We have been astounded at how varied billing practices are with pet sitting businesses.

When we roll out our new billing system, handling the scenario described in this article will be much more intuitive and convenient.

Reports and more reports

Currently, there are 27 different reports you can run in LeashTime. With all those reports, you would think we couldn't have any other types of reports but there are still a few more that many of you have requested and that we will eventually build.

In Table 1, we have list all the reports available in LeashTime.

Table 1 - Report Types

Report Section	Reports
Revenue	by Client by Service Type by Zip code by Referral Type Payments Surcharges Tax Liability
Exports	Clients - Full Export Clients - Address Book Sitters - Full Export Sitters - Address Book
Sitters	Sitter Mailing Labels Payroll Report Projected Payroll Report Gratuities Report Arrivals / Completions
Pets	Clients and Pets Pet Birthdays
Communication	Delivered Reminders Outbound Email Report
Clients	Mailing Labels Account Balances Recurring Schedules Discounts Credit Cards Pet Service Agreements
Miscellaneous	Recent Logins

We have never documented our reports and how they function and what they mean. It was all non-essential to day to day operations and frankly, documenting 30 different reports with different options is a huge undertaking.

At this time of the year when you are all probably gearing up to handle your taxes, we wanted to point out that numerous reports exist for you and your accountants to help.

We won't go in-depth into each report but instead try to generically describe reports. OK, first the logistics, to get to the report page you see in the article, go to **ADMIN > Reports**.

Many reports have a start and end date parameter. In any of the Revenue reports, this may be confusing. For instance, in the **Revenue Report by Service Type**, we show an **Actual Revenue** and **Projected Revenue. Projected** calculates the charges for all visits in the given period, whether they have been paid or not. **Actual** only includes visits in the period for which payment has been made.
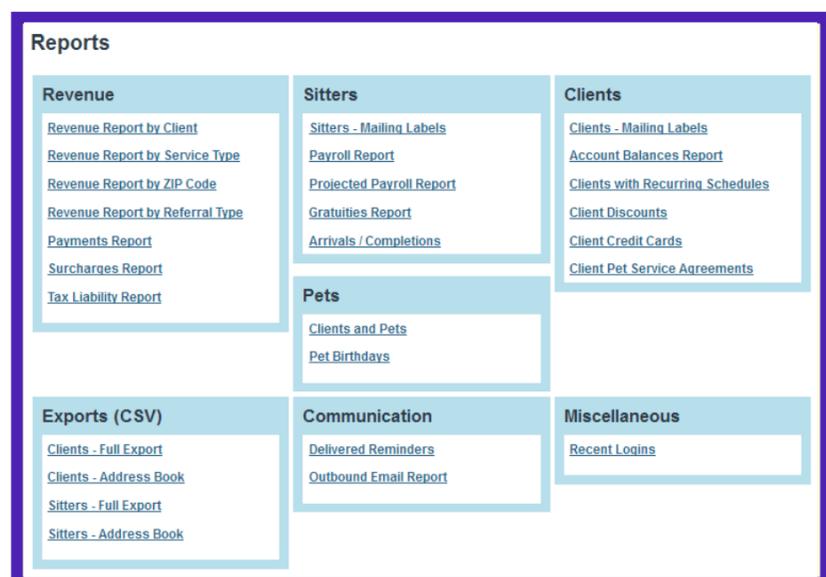
There are two different reports pertaining to Payroll. One is **Payroll Report** and the other is **Projected Payroll Report**. Often, people run the **Payroll Report** when they should be running the **Projected Payroll** report and, consequently, do not see what they expect.

The **Payroll Report** shows actual payrolls you have run on the date you ran them. For instance, you may pay 2 weeks of pay every other Friday (i.e. 1/4 - 1/18) but you do not run the 2 week cycle until the following Monday (1/21). Where new users are usually confused is that they put in the date range for the pay period (1/4- 1/18) rather than the payment date (1/21). You paid all your sitters ON 1/21 FOR visits occurring between 1/4 - 1/18. Your date range should include 1/21 to see a record of what you paid your sitters in the 1/4-1/18 pay period.

The **Projected Payroll Report** allows you to pull up a literal view of all the visits from a start date to an end date and calculate the amount owed (or paid) to the sitter. This report is not concerned with whether visits are complete or incomplete (though it will exclude canceled visits). It just tabulates, for each sitter, the amount of pay due during a given date range. The date range can also be in the future, past, or combination.
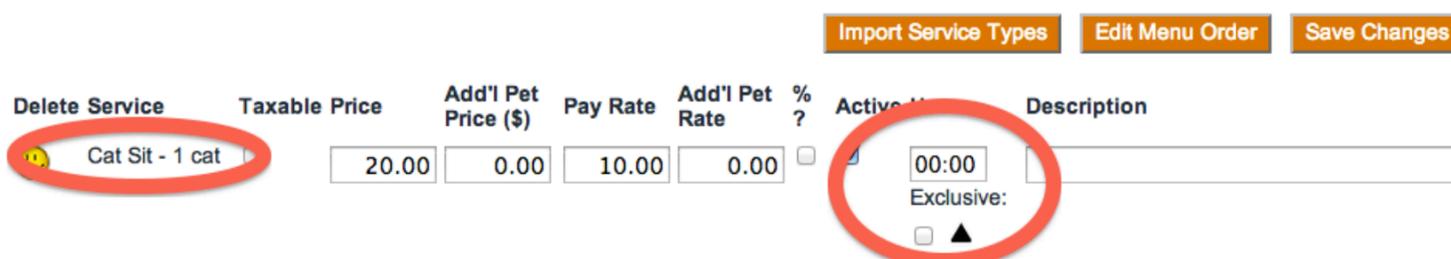
We often get questions such as: is there way to get a report of clients who have garage codes? There is no explicit report or way to generate this report. However, your client data is fully exportable to excel with just about all the fields you need to create a custom report in that environment. You would use the Clients - Full Export report and then the sort functions within excel to get the desired list of clients meeting your criteria.

Another method for exporting a custom client list based on some criteria is to use LeashTime flags and then filter based on flags. Our Pointers section for this month walks you through how to do that.

New Feature Tutorial: Exclusive Service Type

Service List

[Import Service Types] [Edit Menu Order] [Save Changes]

Delete	Service	Taxable	Price	Add'l Pet Price ($)	Pay Rate	Add'l Pet Rate	% ?	Active	Hours	Description
	Cat Sit - 1 cat		20.00	0.00	10.00	0.00			00:00 Exclusive: ▲	

Every service type in **ADMIN > Service List** has an **Hours** column which contains a link. Clicking the link allows you to change the length of time to allocate to a visit, but it also allows you to declare the service type **"Exclusive".** The purpose of this feature is to prevent a manager from unintentionally assigning a sitter to two visits that he could not (or should not) do at the same time.

When you go to create a visit or assign a visit to a sitter, LeashTime will check to see if that sitter has any other visits in time frames that overlap this visit's time frame. If it finds any overlapping visits, LeashTime will check to see if any of these visits are of service types marked "Exclusive". If any of the overlapping visits are marked exclusive, then LeashTime will un-assign the visit being created or assigned rather than assign it to that sitter.

For example, say that sitter Liddy has a visit on her schedule as follows, and Overnight is an **Exclusive** service type:

12/13/2012
7:00 pm-7:00 am
Todd Morgan (Buster) Overnight

If you try to assign another visit to Liddy:

12/13/2012
6:00 pm-8:00 pm
Sirhan Smith (Argus) 15 Minute Walk

LeashTime will instead mark the visit unassigned and show you a warning indicating there is an exclusive visit type already scheduled.

This change will not affect any visits that have already been scheduled. No existing schedules have been altered in any way.

Please visit our training site to get more detailed documentation:

http://training.leashtime.com/ExclusiveServiceTypesStrictandPermissive.pdf