



The Monthly Poop

Why we do it the way we do

New Released Features

Pet Birthday Report

Admin > Reports > Pets

Custom Pet Fields available in Client List export

Admin > Reports > Clients - Full Export

Secure Client Info on visit sheet option

Option to suppress sensitive client info key information and alarm code info. Available in Admin > Preferences > General Business.

Five Stages of Switching to LeashTime

Jody Smith

Stage I: Denial - Can this be true, this program is way too good to be true

Stage II: Anger - Why doesn't my existing software do this stuff.

Stage III: Bargaining - Maybe my existing system will get better, maybe they will add all these great features.

Stage IV: Depression - I have to move all this data, this is going to take forever.

Stage V: Acceptance - I made the move and it's great to be with LeashTime.

We get feedback all day, every day on what could or should be better about LeashTime [many thanks for taking the time to send it to us; we definitely read all of it].

We wanted to share with you what goes through our heads when we get feedback about a substantial change to the system (what may seem trivial to you may actually be substantial) and we have decided we need to do it.

One of the gurus of user-interface design, Alan Cooper, said that software products should understand what a software user's goals are and work to meet those goals. Often, users cannot articulate their goals.

Our job as software designers is to figure out what those goals are based on what we observe. According to Cooper software users have different personas. A persona is a composite of behavioral patterns for prototypical users.

Your persona is probably very mobile. You take care of administrative task on the run and are pressed for time because your business is so time-sensitive.

Your job is stressful but rewarding. You are in a position of a high degree of trust -- you



access a client's home when they are not there, you look after a loved one, and you do this with no margin for error.

We have to put ourselves in your well-worn shoes to truly understand your goals in such an environment. But then we must balance the needs of different user experience levels. Cooper states that there are three levels: Beginners, Intermediates and Experts. Most users start as Beginners but quickly become perpetual Intermediates. Sometimes we tell new users that the first 90 days of LeashTime use will be different than the rest of their experience with the service. Beginners almost always see things differently than Intermediates.

The user interface / user interaction should cater to intermediates, while addressing some of the needs of beginners and experts.

One of the design considerations that Cooper addresses is that intermediates may go for extensive periods of time between using the product. They need reminders when they come back to the product after a period of non-use. Fortunately, we really don't have this problem. Most of you either are or will become high-level intermediates. You will typically use our product on a daily basis.

If you compare the design of the manager / owner interface with the client's interface, you will notice that we have intentionally simplified functions considerably (and have plans to further simplify). We figure that while you may give LeashTime 60 days to prove that it works for you, your clients will give us about 60 seconds. That means we must design sophisticated and powerful solutions for you, but offer easily grasped tools to your clients. It is a balancing act.

Keep the feedback coming and let us know what you think works and what does not.

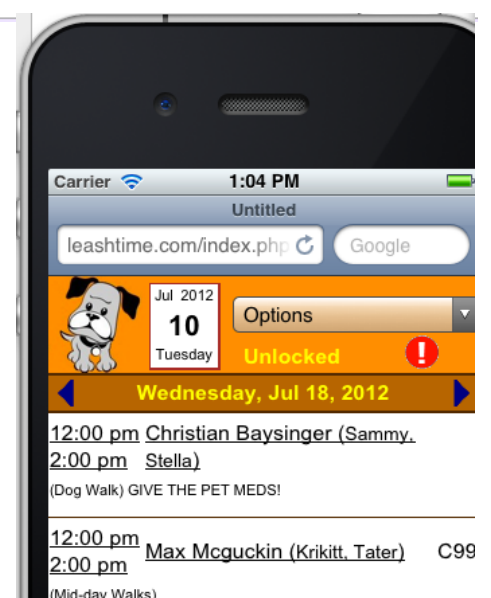
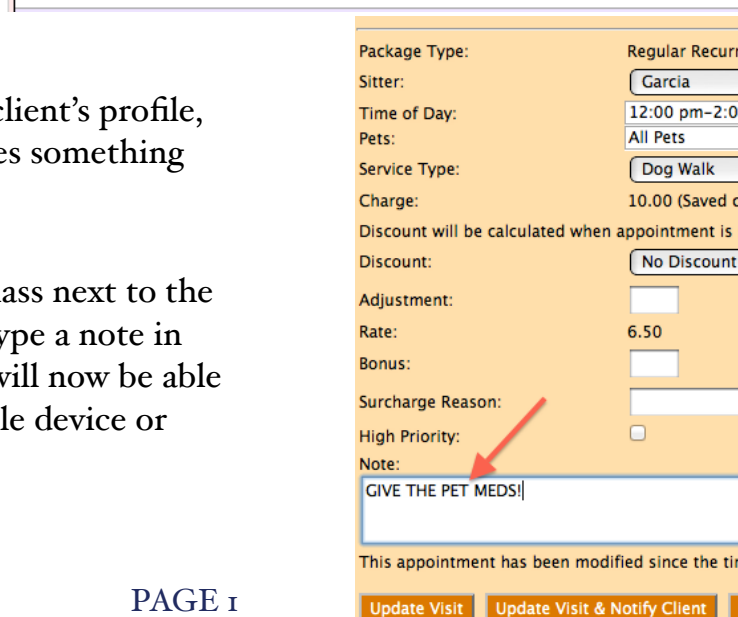
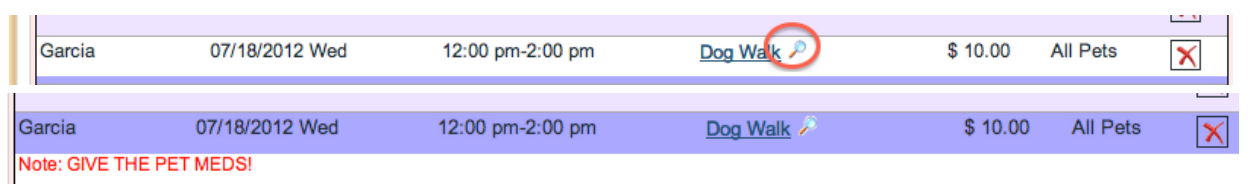
POINTERS (NOT THE DOG BREED)

VISIT NOTE

LeashTime allows you to add a note to a specific visit. Adding a note to a specific visit highlights something important or critical about the visit.

Sitters have access to detailed visit sheets for each client's profile, however, the visit note stands out and communicates something important about this particular visit.

To add a visit note to a visit, click the magnifying glass next to the visit to bring up the detail view of the visit. Then, type a note in the **Note** field and click **Update Visit**. The sitter will now be able to see the note when they login, whether on a mobile device or through the web.



Billing: Package Pricing

Selling and Managing Package Pricing

Date	Account Balance
July 27 Client purchases 20 pack	\$360 CR (PAYMENT)
August 1 (in the morning)	\$360 CR
August 1 (after visit marked complete)	\$342 CR
August 2	\$324 CR
August 3	\$306 CR
August 6	\$288 CR
August 7	\$270 CR
August 8	\$252 CR
August 9	\$234 CR
August 10	\$216 CR
August 13	\$198 CR
August 14	\$180 CR
August 15	\$162 CR
August 16	\$144 CR
August 17	\$126 CR
August 20	\$108 CR
August 21 [Client should be prompted to purchase another package]	\$ 90 CR
August 22	\$ 72 CR
August 23	\$ 54 CR
August 24	\$ 36 CR
August 27	\$ 18 CR

After a few recent installations, I decided to write a newsletter article about Package Pricing. What I mean by package pricing is that you sell something like a 20 pack, 10 pack or 5 pack of visits for a fixed fee.

The client agrees to prepay for a certain number of walks at a discount and generally has a lot of flexibility scheduling and canceling those walks. This package pricing model has some major advantages:

- (1) Prepaid, which is great for cash-flow.
- (2) Value to client, who often get a discount and greater flexibility scheduling.

LeashTime’s methodology for handling payments and applying credits makes

it a good natural fit for this type of pricing model.

As you may recall from previous newsletter articles, we only apply credits/ payments to visits when they are marked complete. For instance, if you have scheduled a recurring client who gets service M-F mid-day, they might buy a 20 pack of visits. Normally, you might charge \$20 a visit but if they buy a 20-pack, the cost of each visit is \$18. Therefore, the total package price is \$360.

As you mark visits complete, the credit on the Account Balance will be decreased by the amount of the each visit charge.

This can easily be applied to the mechanics of billing for a package. In fact, this is precisely what you are doing when selling a 20 pack, 10 pack or other similar package.

When the client’s Account Balance (available credit) falls to a certain threshold, they would need to be prompted to purchase another package. This will be different for different businesses depending on your billing practices (e.g. if you have auto-pay authorized credit cards, you can simply set a reminder to purchase another package at a designated date unless you hear differently from the client).

From a LeashTime accounting perspective, all payments are treated the same. They go into a pool of available credits and are applied against visits as the visits are completed. You and the client simply need to be notified that credits will run out and that a new package needs to be purchased.

The table at the beginning of this article shows how a package purchase is consumed as visits are completed. As you can see in the table, the client is using up \$18 worth of credits per day. At some point, they will run out of credits. You may want to send them a reminder on August 21 that they need to purchase an-

other package, and then the cycle begins again.

At present, we are adding functionality to better manage reporting to alert you that clients designated as package clients have dropped below a credit threshold and therefore need to purchase another package.

So, how would you keep track of whom to bill and when to bill them? As with most things in LeashTime, there are multiple solutions. The following solution is straightforward if not very elegant.

You would go to **CLIENTS > Billing** each day and run a report for one week to determine who will run out of credits in the next 7 days.

In Figure 1, you see what this looks like for our example client, Curtis Beegle, for August 1 - 7 after he has bought his 20 pack of services. The first column shows payments due for services scheduled. The second column shows how many credits the client has available. The third column shows the net amount due or remaining credits.

Figure 1 - Date range 8/1 - 8/7

<input type="checkbox"/>	Curtis Z. Beegle	View	\$ 90.00 (PAID)	\$ 360.00	\$ 270.00cr
<input type="checkbox"/>	Jonah B. Belgrave	View	\$ 60.00	\$ 0.00	\$ 60.00
<input type="checkbox"/>	Roland Belk	View	\$ 640.00	\$ 0.00	\$ 640.00
<input type="checkbox"/>	Van Benoit	View	\$ 260.00	\$ 0.00	\$ 260.00

As you provide service for the Beegles during August, the credits are consumed. When you run **CLIENTS > Billing** for the period 8/22 - 8/29 (Figure 2), you will see that the Beegles are going to run out of credits at the end of the period based on scheduled visits. At this point you will process another 20 Pack purchase for \$360 or send the client a reminder that they need to purchase another 20 pack.

Stay tuned for enhanced functionality to streamline the process of managing Package Pricing.

<input type="checkbox"/>	Guy Beaudreau	View	\$ 80.00 (PAID)	\$ 100.00	\$ 20.00cr	Pay
<input type="checkbox"/>	Curtis Z. Beegle	View	\$ 108.00	\$ 90.00	\$ 18.00	Pay
<input type="checkbox"/>	Jonah B. Belgrave	View	\$ 60.00	\$ 0.00	\$ 60.00	Pay

Figure 2 - Date range 8/22 - 8/29

Short Story: Can Dogs Cry?

by Jax Taylor



The stench smacked me silly. I almost puked. Sunlight flooded the cavernous barn, barks ricocheted off the rotting wooden walls as we swung the door open. All the dogs were clamoring for attention, desperate to get out of there. To be somewhere. Anywhere. They came from alleys, dumpsters, crack

houses, dog fights. They were hopping around like pogo sticks, bark bark barking.

Pick me

Pick me

Pick me

Please

Please

Please

I promise I won't pee in your house

I promise

I promise

Can you be my Forever Home

Can you

Can you

Please

Please

I'll guard your drugs

I'll fight other dogs for you just like before

You can hit me anytime you want, it's OK I can take it

We looked at the sea of dogs in the dark barn, on the farm in Williamston, Michigan. I told Mom I wanted a dog and she said she might be able to let me have one. When Mom called the rescue shelter, they said they had just the dog for us. They hadn't been able to find a home for him in six months. He was too big. We thought he looked like he had pitbull in him and that might have been the reason why they couldn't find a home. They said he didn't have any pit in him.

They put an electric collar on him and let him come out of the barn and out in the farm field. He ran like crazy, savoring each stride of his run, tongue hanging out. He was so sweet and he came up to us in his own, cool way and looked blankly through us. He had been in the barn for six months, and god knows where before that. His time on this earth was short, like many of the dogs in the barn. He knew if he didn't find a home, he would be put to sleep. He was sick of showing off for People. Take me or just let me slip quietly away and find peace. He just wanted to run and be free, if only for a few minutes. I fell in love.

"Mom, this one, can we have this one," as I pointed at his big pumpkin head.

"We'll have to think about it. You know a dog is a big responsibility."

"I want to name him Stewie," after my favorite character on Family Guy.

"Can we think about it overnight," Mom said to the rescue worker.

"Of course. We want to make sure you are certain and it is a good fit."

I looked back at Stewie. I wanted to take him right then and there.

I wanted to give him his Forever Home.

No more shelters.

No more cages.

No more sleeping on cold hard concrete floors.

No more breathing in stale dogshit as he slept.

No more dogfighting.

No more wondering about tomorrow.

I'd give him People food.

Wake up, chase squirrels in the big park behind our house, dig, sniff, run, sleep, get loved, get loved more, be petted, curl up in bed with me.

"Mom, the dogs in that barn were so sad."

"They all come from tough environments and were abandoned."

"I wish we could take them all."

"Me too."

"Mom, can dogs cry?"

"I don't know sweetie. I've never seen one cry."

"Do you think they cry when they get taken from their Mom-mies?"

"I think they would."

"Maybe they don't because they don't want the other dogs to see how scared and sad they are to be alone."

He never did become my Dog. I became His Person.

Tutorial: Sending Confirmation Emails

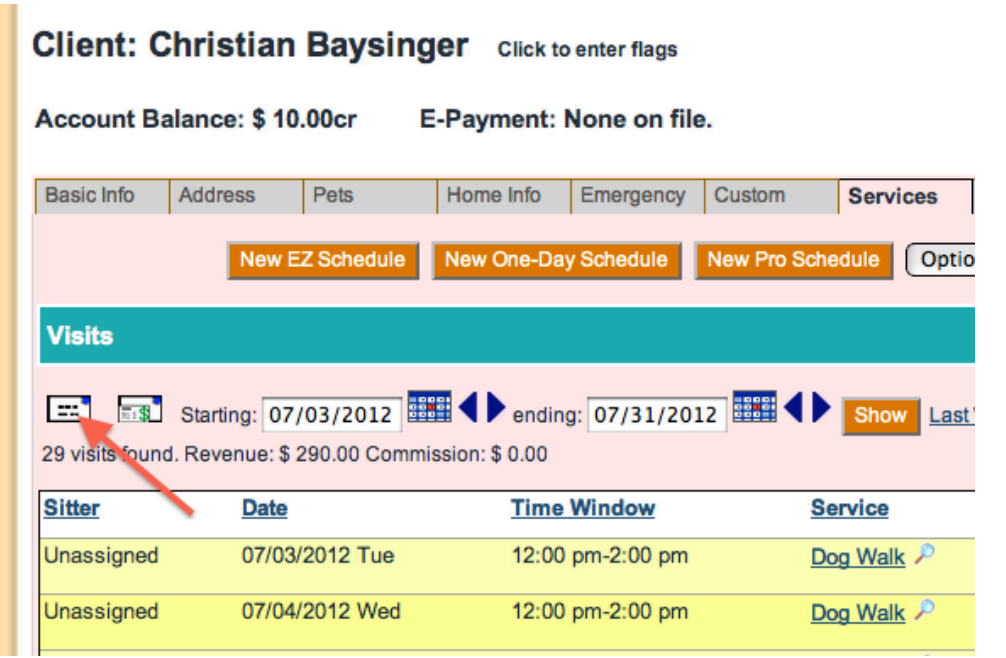
Last month, we had a tutorial on setting up LeashTime to use your own SMTP server to send mail. Many of you were able to successfully configure this option in LeashTime.

This month, we are going to cover how to actually send emails to clients. All of the email communication that you send out is logged in the client's or sitters **Communication** tab of their profiles. This allows you to quickly determine who has been sent email.

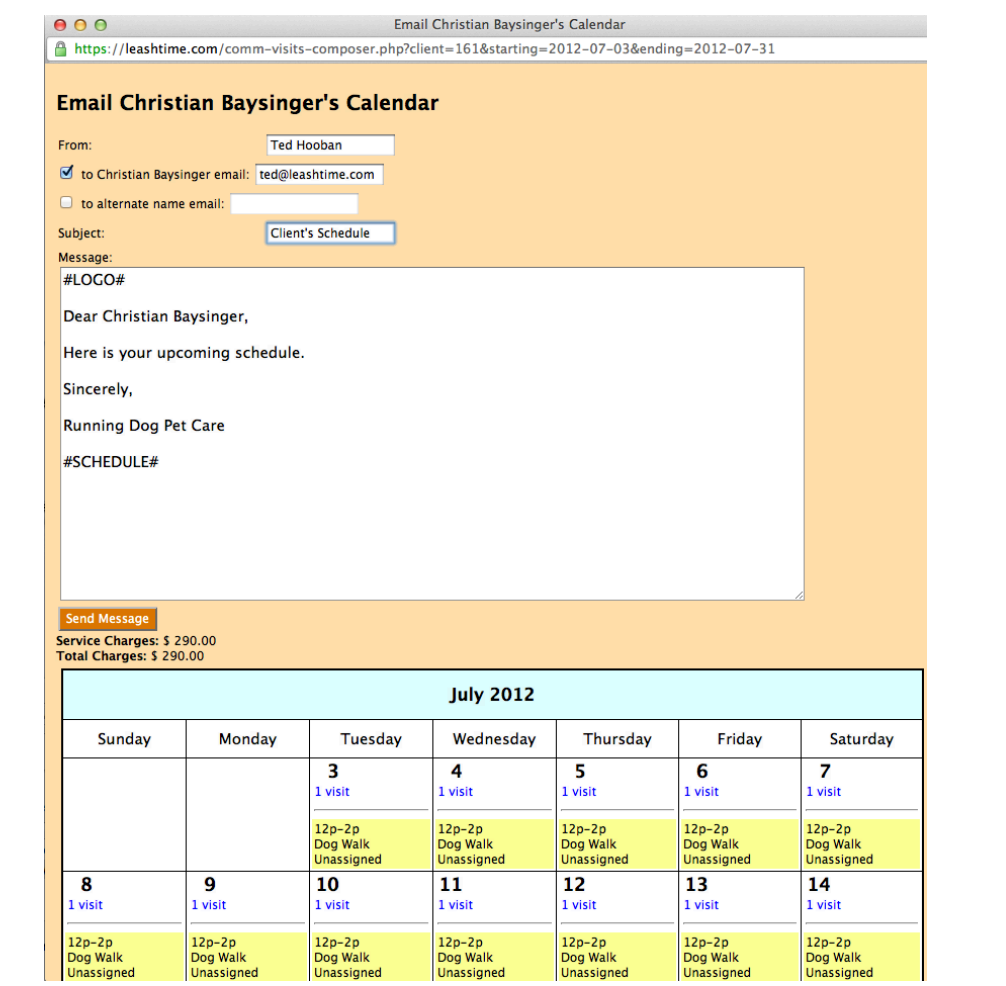
We will first discuss sending out emails to clients. The most common email communication from LeashTime to clients is a schedule confirmation and an invoice statement.

To send out a schedule confirmation email to a client, follow these steps:

- (1) Go to the client's profile, **Services** tab
- (2) Set the **Starting** and **Ending** date for which you want to send out a schedule confirmation and click **Show**.



- (3) Click the envelope icon in the upper left corner of the screen.
- (4) A composer window will appear showing a preview of the message. (The actual message will be properly formatted).
- (5) You have an opportunity to review and edit the message. You can add more text to the email or simply overwrite it.



(6) In the top half of the screen, you see the email message. In the bottom half of the screen you can preview what the calendar view looks like for the client

(7) Once you are satisfied, click the **Send Message** button and the schedule confirmation email will be sent to the client.

You may have noticed that the message in the composer was already written and had odd text (#LOGO#). The pre-supplied message is called a template. #LOGO# is a token. Tokens are placeholders that are replaced when the message is sent. #LOGO# will be replaced by your actual logo when LeashTime delivers the message.

To set up email templates, go to **ADMIN > Client Management > Email Templates**. From here, you are able to create your own templates and edit pre-existing templates. LeashTime has several pre-defined templates that you may modify.

There are three types of templates:

- Client Email Templates
- Sitter Email Templates
- Other Templates

The first two types of templates are probably self-explanatory. The third type of template, **Other Templates**, are LeashTime system templates. LeashTime has defined some standard situations, like sending a confirmation of a client schedule or sending a confirmation of cancellation request, where a template should be used. You can modify the contents of these templates as much as you like. They are just triggered by particular actions you take in the system.

The template that was used when we sent our schedule confirmation is labeled **Client Schedule**. If you click the label, a

Email Templates

[Add New Template](#)

Client Email Template	
Template	Subject
Upcoming Schedule	Upcoming Schedule
Pet Food Recall	Pet Food Recall

Sitter Email Template	
Template	Subject
Upcoming Sitter Schedule	Upcoming Sitter

Other Templates	
Template	Subject
Client's Schedule	Client's Schedule
Invoice Autopay Email	Your Invoice

popup will display that allows you to edit the template. You will notice that there are # characters enclosing upper-case text. These are called tokens. The template will understand what context it is in (such as which client account you are working in) and pull the appropriate information (name, schedule, pets). You can also embed HTML tags to enhance the formatting of your email message.

Go ahead and modify the text and save it. Now go back to the client profile and click the envelope icon and see your changes. You just created your own custom email template!