



The Monthly Poop

Support Soliloquy

New Released Features

Stay tuned for some major release announcements.

BILLING BILL OF RIGHTS

- (i) No client shall be denied access to the system for lack of bill payment without sufficient due process.
- (ii) All clients are entitled to their data no matter what the status of their account. **IT IS YOUR DATA. YOU WILL ALWAYS BE ABLE TO EXPORT IT** or receive a copy of it.
- (iii) You may always redress your grievances (i.e. ask for a credit on each monthly statement) if you feel the billing is inequitable. If you barely go into another price tier, let us know. We can credit you back appropriately.

I remember when I was a little kid, there was this commercial on all the time with an older gentleman named Sy Syms. Sy pioneered selling discount brand name clothing. He used to say “an educated consumer is our best customer.”

I really didn't know what he meant when he said that. It sounded cool and different. His maxim applies to LeashTime.

This newsletter, the online training videos, forthcoming new documentation and numerous phone calls, training sessions and emails are part of our core philosophy that educating our users to help them solve problems is our primary business. Not making software. Software is simply a means to an end.

Sometimes, a function that is a strength for one user is a weakness for another. Usually, we try to accommodate both users with a configuration option. Sometimes, we are not sure if it could or should be a configuration option. We learn



just as much from you as you, hopefully, learn from us.

In the last month, we have continued to receive new client inquiries at a rapid pace. We have received some feedback that I'd like to point out.

“Can you give us more heads-up when you are making changes.”

Usually, this occurs when the system locks you out with a message that basically says FATAL ERROR and a ten to fifteen minute delay. We literally make dozens of changes a week. LeashTime is used around the

world 24/7/365. There is no good time to schedule updates. But as we continue to grow rapidly, we may have to slow down the pace of development in favor of increased stability.

“You are very quick to respond to a customer service inquiry.”

We try to respond as fast as we can, but it is getting harder to do so with our growing client base. [To those of you waiting for a response from me, I apologize. I will get back to you, I promise]. We are running very hard to continue to provide responsive service. We do triage to determine the most urgent request types. Billing and email support issues generally are at the top of the list.

The best support strategy is to minimize the need for support. That is why educating you upfront and getting you going on a solid footing is so important to us. As Sy Syms said, “an educated consumer is our best customer.”

POINTERS (NOT THE DOG BREED)

HOLIDAY VISITS

MANAGER FOR RECURRING CLIENTS

Recurring schedules generate visits for all days without regard to whether they are a holiday or not. If Christmas is on Monday, you will likely have a situation where your recurring clients still have visits scheduled. To address this situation, you need to set up your observed holidays by going to **Admin > Surcharges** (even if you do not have surcharges for those holidays). You need to define the dates for all of your holidays for the year.

The second step is to schedule notifications that recurring visits are still scheduled on the defined holidays. In order to set this up, go to **Admin > Preferences > Holiday Lookahead Period** and tell LeashTime how many days in advance you want to be notified about recurring visits on a particular holiday. LeashTime will notify you via the **Request Queue** and **Email**. From there, you will be able to cancel en masse.

Select All Visits Deselect All Visits

Client	Time	Service	Price	Sitter	Surcharges
Independence Weekend-Sat. - Monday, July 2					
<input type="checkbox"/> Damien Alonso	11:00 am-1:00 pm	Mid-day Walks	\$ 14.00	Kimberly	\$+\$
<input type="checkbox"/> Nelson Amsden	1:30 pm-2:30 pm	Mid-day Walks	\$ 14.00	Garret	\$+\$
<input type="checkbox"/> Marco A. Arispe	12:00 pm-2:00 pm	Dog Walk	\$ 10.00	Heather	\$+\$
<input type="checkbox"/> Kurt Backes	12:00 pm-2:00 pm	Dog Walk	\$ 10.00	Garret	\$+\$
<input type="checkbox"/> Winston X. Barreiro	12:00 pm-2:00 pm	Mid-day Walks	\$ 14.00	Garret	\$+\$

DEFINE CUSTOM TIME WINDOWS

When you set up visits, you can choose from pre-defined time windows. These pre-defined time windows can be customized for your business. You can also add custom time windows that you have defined.

Go to **Admin > Client Management > Named Time Frame List**

The first four defined time windows will be default template setting options in EZ Schedule.

	Label	Time of Day
Time Frame #1	Morning	7:00 am-9:00 am
Time Frame #2	Late Morning	9:00 am-11:00 am
Time Frame #3	Midday	11:00 am-1:00 pm
Time Frame #4	Afternoon	1:00 pm-3:00 pm
Time Frame #5	Late Afternoon	3:00 pm-5:00 pm
Time Frame #6	Evening	5:00 pm-7:00 pm
Time Frame #7	Night	7:00 pm-9:00 pm
Time Frame #8		
Time Frame #9		

Basics of Billing

Part III - But this visit was already paid

Remember from last week, our two key principles in LeashTime:

A billable is only created when a visit is marked complete.

We apply payments to individual visits on a first-in, first-out basis.

Here is a typical scenario that causes a lot of confusion:

1. Create recurring schedule beginning on May 1 for mid-day walk at \$10 per visit, for a total of \$230 in charges for the month of May
2. Mark all the visits complete
3. Receive payment on May 31 from the client for \$230 to pay for May service.
4. June services begin and you mark visits complete on June 1 and June 2.

Current Charges	\$ 230.00
Tax	\$ 0.00
Prior Unpaid Charges	\$ 0.00
Payments & Credits	\$ 230.00
Amount Due	\$ 0.00
Date Due	Upon Receipt

5. You change visits on May 15 and May 16. You simply change the sitter. Or perhaps you change the service but the price does not change.

So, what happens and why does it cause confusion?

1. When you edit the appointments on May 15, 16, LeashTime will automatically create system credits because they have already been paid for and now we do not know what you are going to do with those appointments (cancel, change the price).
2. LeashTime applies the system credits to the next completed appointments (June 1, 2).

Credits and Payments	
Date	Original Amount
06/10/2012	\$ 230.00
06/10/2012	\$ 10.00
06/10/2012	\$ 10.00

\$ 0.00 CREDIT: Visit on 5/15 changed. (v: 10908 b: 6869).
 \$ 0.00 CREDIT: Visit on 5/16 changed. (v: 10909 b: 6870).

3. The May 15, 16 appointments have an unpaid status, which will be reflected on the invoice.
4. You mark May 15, 16 complete, but there are no credits to pay for these appointments. The Account Balance will reflect

Malinda Deschamp
 Somewhere Street
 Somewhere, US 28314

Current Charges	\$ 210.00
Tax	\$ 0.00
Prior Unpaid Charges	\$ 20.00
Payments & Credits	\$ 20.00
Amount Due	\$ 210.00
Date Due	Upon Receipt

Prior Unpaid Charges				
Date	Time of Day	Service	Sitter	Charge
05/15/2012	12:00 pm-2:00 pm	Dog Walk	Garret C. Peiffer	\$ 10.00
05/16/2012	12:00 pm-2:00 pm	Dog Walk	Garret C. Peiffer	\$ 10.00
				Subtotal: \$ 20.00

Current Charges				
Date	Time of Day	Service	Sitter	Charge
06/01/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00
06/04/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00
06/05/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00

that these visits are not yet paid for. However, this is balanced by the fact that the June 1 and 2 appointments are paid for.

This is, of course, confusing for you and your clients. Both of you believe that the visits were paid for. And they were. However, when you modified the May appointments after they were completed and payment was applied, the payment was unapplied.

Overall, the Account Balance is still correct and will show the same amount is due. The payments were unapplied from May, credits were created and, as per LeashTime's method for

handling payments, applied to the next chronologically completed appointments. These happen to be June 1 and 2.

The reason we do this is that we are not sure what you plan to do with the May 15/16 appointments once you change their status from completed and paid-for.

We have to create credits to maintain the integrity of the Account Balance. These system generated credits will appear in the ACCOUNT tab of the client's profile. This may appear odd, but they do belong there.

So, how can you fix this? First of all, it is not necessary to fix it as everything is still balanced. However, many times you or your clients may not understand why this occurs.

You must VOID the original payment. Then, VOID the system generated credits. Make sure you have marked the May 15 and 16 appointments complete. Then click **Make Payment** and re-enter the same payment information again. This will sync your payment.

Create the June invoice again. You will now see that there are no May appointments that are **Prior Unpaid Charges**. Also, notice that the amount due on the invoice is the exact same as the amount due on the invoice where payments were not in sync.

Malinda Deschamp
 Somewhere Street
 Somewhere, US 28314

Current Charges	\$ 210.00
Tax	\$ 0.00
Prior Unpaid Charges	\$ 0.00
Payments & Credits	\$ 0.00
Amount Due	\$ 210.00
Date Due	Upon Receipt

Prior Unpaid Charges				
No Prior Unpaid Charges Found.				
Current Charges				
Date	Time of Day	Service	Sitter	Charge
06/01/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00
06/04/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00
06/05/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00
06/06/2012	12:00 pm-2:00 pm	Dog Walk	Les Mcclung	\$ 10.00

Email Sitter Schedules

There are numerous places in LeashTime where you can send email. Typically, you will automatically email sitters their schedules on a daily basis.

You can check these settings by going to **Admin > Preferences > Sitter Schedule Notifications**. There are two options here **Send Daily Schedules by Default** and **Send Weekly Schedules**. If the sitter does not have visits for a day, you may opt to **Suppress provider schedule email when there are no visits**.

For each sitter that you have, you can override these global settings by going to the sitter's profile and **Employment** tab. On the right hand side of the tab are option settings for Daily and Weekly emails. These emails are automatically sent out at 4am each day. At present, there is no option to change the time setting.

Sometimes, you need to send sitter emails later in the morning or send them a new email with a revised schedule. You can send out the most up-to-date sitter schedules at any time by going to **Sitters > Sitter Schedules**. Select a sitter, set start and end date and then **Show**. Then click the envelope icon.

Sitter: Dawn Starting: 06/10/2012 ending: 06/13/2012 Show 

3 appointments found. [Print Friendly](#)

Monday, June 11, 2012		
Morning	Midday	Afternoon
	Ginette Broady Dog Walk 12:00 pm-2:00 pm All Pets Charge: \$ 10.00 Rate: \$ 6.50	
Tuesday, June 12, 2012		
Morning	Midday	Afternoon
	Ginette Broady Dog Walk 12:00 pm-2:00 pm All Pets Charge: \$ 10.00 Rate: \$ 6.50	
Wednesday, June 13, 2012		
Morning	Midday	Afternoon
	Ginette Broady Dog Walk 12:00 pm-2:00 pm All Pets Charge: \$ 10.00 Rate: \$ 6.50	

If you want to send out current schedules for all sitters in a batch, go to **Sitters > Email / Alerts**.

- (1) Click **Select All**
- (2) Choose **Upcoming Sitter Schedule** template option
- (3) Choose Starting and Ending dates of visits you want to show sitter
- (4) Click **Send Email to Selected Sitters**

For the given start and end date range, LeashTime will generate an email to the selected sitters with their schedules.

Featured Feature

CUSTOM FIELDS

For both clients and pets, you are able to set up custom fields. Custom fields can be designated as office only, otherwise they are available to sitters / clients to view.

To set up custom fields for the client profile go to:

Admin > Client Management > Custom Client Fields

There are label fields for each of the custom fields you want to add to the client profile. Fill in an appropriate label. Then, you will tell LeashTime what kind of field it is. The options are single line of text, multiple lines of text or a check box. Once you have defined all your fields, make sure to check the **Active** checkbox and **Save**.

Custom Client Fields

Active	Label
<input checked="" type="checkbox"/>	TESTING
<input checked="" type="checkbox"/>	TESTING NO. 2
<input type="checkbox"/>	
<input type="checkbox"/>	

The custom fields will now appear as part of every client profile. They will be inserted as a new tab in the client profiles.

For custom pet fields, go to:

Admin > Client Management > Custom Pet Fields.

There are label fields for each of the custom fields you want to add. The custom fields are made available for each pet, so create all the possible custom fields regardless of breed. These custom fields will appear in the pet profile section of the client profile. If the fields are not filled out for any given pet, they will be hidden from the view.

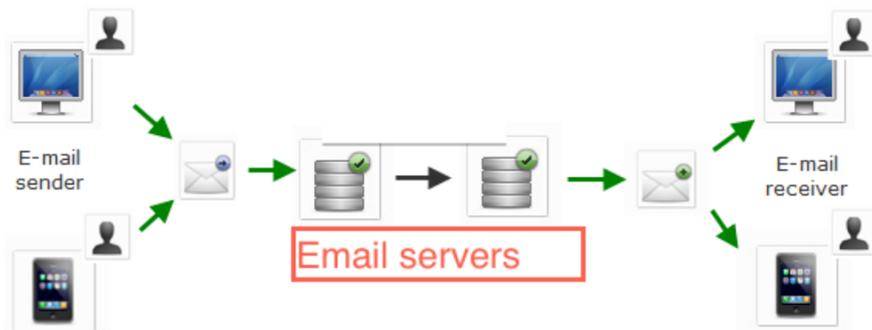
Custom Pet Fields

Active	Label
<input checked="" type="checkbox"/>	Declawed
<input checked="" type="checkbox"/>	Routine
<input checked="" type="checkbox"/>	Toys
<input checked="" type="checkbox"/>	Behavioral
<input type="checkbox"/>	

Tutorial: Email Basics

If you are online at all, you have email. Email is ubiquitous. When you send an email from your web browser or your Outlook (or other mail program), you may not give a lot of thought to how it is actually transported to the recipient.

You typically will write your email in a composer window and then click SEND. As soon as you click SEND, the message is transmitted over the Internet. Much like a phone call that you make, the message has a long and treacherous journey that is completely hid-



den from you. You simply know that it reaches to the intended recipient most of the time.

So what happens:

- (1) The text of your message is “packaged” up. When you send a regular paper letter, you have to put a name, address, city, state, zip, maybe country. Then you have to put it in an envelope, lick the envelope, seal the envelope... you get it by now. Well, the computer has to do comparable work.
- (2) Like all things transmitted through the Internet, your email is broken down into several smaller pieces. This is done by the mail server to which you are connected. Your mail server is like a P.O. Box and post office.
- (3) Your mail server sends the pieces of your message out over the Internet and asks that things be delivered to another mail server associated with the recipient.
- (4) The recipient’s mail server assembles the email into a readable form and lets the recipient’s mail client know that a new message has arrived.
- (5) The recipient is able to read this message and respond to you.

When you initially sign up for LeashTime, typically, your email is being sent through LeashTime mail servers. Before you go live with LeashTime, you will want to change the settings to route emails through your own mail server. There are several reasons for doing this:

- (1) Emails that you send from LeashTime will truly be coming from your email account.
- (2) Your email will not be directed to the SPAM folder as frequently.
- (3) Your email will less likely be blocked.

Setting it Up

Business Preferences

[Show All Preferences](#) - Click on a bar to expand the section. Click it a

General Business

Client User Interface

Sitter User Interface

Outgoing Email

[Sender Email Address](#) ehooban19@gmail.com
[Reply to Email Address](#)
[CC sent mail to](#)
[SMTP \(Outbound eMail\) Host](#)
[SMTP Port](#)
[Use Secure Connection](#)
[Email User Name](#)
[Email Password](#)

You will need to obtain the following information from your mail host provider:

- SMTP address
- SMTP port
- Secure connection setting

You might be able to cheat and find this information in your Options settings for your Outlook or other mail client. SMTP stands for Simple Mail Transport Protocol Once you have obtained this information, you may now configure it in LeashTime.

- (1) Click **Sender Email Address** and type your email address
- (2) Click **SMTP (Outbound eMail) Host** and type the address
- (3) Click **SMTP Port** and type the port number
- (4) Click on **Secure Connection** and choose the appropriate security method
- (5) Click on **Email User Name** and type your email address
- (6) Click on Email Password and type the password for your email account.

That is it. If all is properly configured, your emails will now be routed through your own SMTP server. You should be sure to test sending out an email. Go to a client’s Communications tab and click **Compose Email**. Send an email to yourself (you can type over the client email that is automatically populated). Make sure the email arrives. If it does not, you should contact support@leashtime.com. Next month, we will review the various emails that you can send from LeashTime.