



# The Monthly Poop

## Welcome to the first issue!

### Road Map

iPad bug fixes

New and Improved Billing

Client one-time payment through email

Package Pricing Support (buy 20 pack of visits for \$xx)

Client Account Overhaul with numerous customizations

### Wish List

You asked for it, we wish it was here too. We don't know when we will get to these feature requests but they made the "List."

Delete any appointment

Change the day of appointment

Price change tools

GPS mileage tracking

Pet pictures on invoices

More automatic surcharge options

We want to thank all of you for supporting LeashTime. When Matt and I started this business 4 years ago, we really didn't know what to expect. We vastly underestimated how detailed your needs are and the wide differences in how you operate your businesses.

We once shared a boss who had a borderline personality disorder, but did manage to make a statement that we have found to be true. He said that it takes about 2 - 3 years for a real first version of a software product to be viable. I don't think there is much we could have done differently to disprove this maxim.

It has been a really fun 4 years. We are very proud of what we have accomplished so far, but we have a very long list of things we want to do to improve the system.

We want to work hard to meet your needs and continue getting emails from our users that basically say something like this: "LeashTime



want to write or contribute let us know).

Thanks again for all your support and patience. We hope that LeashTime will continue to improve the quality of your life.

By the way, the artwork above was done by my [Ted] sister, Susie. Those are Brian and Stewie, a couple of pointers who, evidently, couldn't point. Matt & Ted

has made my life so much better. I couldn't live without it." We love what we do and we love when you love what we love.

We will be publishing this newsletter on a monthly basis. The current newsletter issue and back issues will be available at <http://training.leashtime.com>

The newsletter will provide updates on product development activity, tutorials, case studies, editorials, industry observations and best practices (if you have anything you

## POINTERS (NOT THE DOG BREED)

### EZ SCHEDULE

To make your billing go more smoothly, set the start and end date of an EZ Schedule to coincide with the billing period for the client.

### REMINDERS

Reminders can be used for just about anything. They are simple and flexible. If you haven't already, you should explore incorporating reminders.

Go to the **Communications** tab of the client profile and click **Reminders**.

Click **Add Reminder**

Ignore **Group Reminder** and **Reminder to** options (we'll cover those later)

If you want a recurring reminder, choose either **on Day of month** or **on Day of week**

Choose **on a particular date** for a one time reminder

Click **Save Reminder**

On the appointed date, a reminder will automatically appear in your **Request Queue**. You will also get an email.

### BILLING REMINDERS

This is a new capability for petsit schedules where you will be reminded automatically about the start of a new schedule and the end of a schedule. You will receive the reminder in your **Request Queue** and via email.

If you want to turn on this option, you should do the following:

Go to **Admin > Preferences > Billing Preferences**

Choose **Send Billing Reminders**.

Change to YES.

Choose **Billing Reminder Lookahead Days** and enter the number of days prior to a schedule start that you would like to be notified.

Group reminder

Reminder to  Just me (private)  All Managers

Send Reminder  on Day of month   
 on Day of week   
 on a particular date

Subject   
 73 chars left

Note:

# Basics of Billing

## Sneak Preview

### NEW BILLING

## Common Problems

Our number one support issue is Billing and Invoicing. Usually, the first three months after transitioning to LeashTime generate the largest volume of billing support issues. Here are some of things we have seen:

Custom pricing incorrect	Don't panic. Contact our support. We will help you clean it up. Make sure you go to the BILLING tab of the client profile and set the correct prices. We can take it from there and guide you through.
Billable visits do not show up in Clients > Billing	These are part of an EZ Schedule that started on a date prior to the start date of the current billing period. To fix, Edit the EZ Schedule and change the start date to match billing period start date. You will not lose visits prior to the new start date (though you may not see them in the EZ Schedule).
Client paid \$300 for February and they had \$300 in visits. But when I generate an invoice statement for March, it shows the last visit in February as prior unpaid.	Very likely you had modified a visit after it had been paid for. This will generate a new billable and it will move to the front of the line of billables to be paid off. In our Basics of Billing tutorial series, we will cover this issue. There is actually nothing wrong with the arithmetic or total net amount due. Look at the Payments & Credits field at the top of the invoice statement. If there is a credit there that you did not expect to see, then this is likely what has occurred. Your payments are out of sync for the current billing period (they will naturally get back in sync within 1 - 2 more billing periods). To clean this up and make it more sensible to you and your client, simply VOID the last payment, then manually record it again. Don't worry if it is a credit card payment, it will not refund the card (for that you have to explicitly use our refund function).

Within the next few weeks, we hope to finalize our testing and re-release our new billing functionality. We currently have some confusing rules regarding display for petsit visits (created using EZ Schedule) and when we display visits and when we do not display visits to be billed. When most people bill for petsits and recurring services they have two different billing policies.

For petsits, you generally either want to bill before a schedule starts or after a schedule has ended, regardless of when your billing cycle occurs. However, you may also bill your recurring clients on some regular basis (e.g. the 1st of each month for the previous month). This fairly common scenario means that you have two different billing policies for two different types of clients.

To make it easier to treat these two types of clients differently, we have segregated them in **Clients > Billing**. See the screen shots below.

The view on the left shows recurring visit clients and the view on the right shows petsit clients. All clients with outstanding bills are displayed on the same page but in the appropriate section. Petsit clients will have an arrow indicating whether the petsit began prior to the currently defined billing period or ends after the currently defined billing period.

Stay tuned for the release of New Billing and a thorough breakdown of the new capabilities.

## Part I - Background

LeashTime provides a comprehensive set of accounting capabilities. The accounting system in LeashTime is tailored for the needs of running a petsitting business. Over the next few issues of our newsletter we will be covering in depth, the various capabilities of our accounting system.

Billing encompasses several core functions:

- (1) Sending invoices to clients
- (2) Tracking past due amounts
- (3) Recording payments
- (4) Applying payments to billables
- (5) Credit card and/or ACH (echeck) processing

One concept that we need to clarify about LeashTime invoicing is that we consider the service items listed on the invoices as the things to track, not the invoice itself.

In other words, when you record a payment from a client, we automatically apply it to the first, unpaid billable (each visit has a corresponding billable). We continue applying the payment to billables until you either run out of billables or you run out of payment credit. The rest of the payment (whether credit or amount owed) will go to the client's Account Balance.

Invoices are really just a report or snapshot at some arbitrary point in time. Although the question may

be phrased "What are the balances on my invoices?", what you really want to know is how much do I owe for visits that have been done. Add up all the charges for those visits and subtract the payments. What is left over?

At its core, we are answering a very simple question and have a very simple methodology. We apply payments to completed visits on a first-in, first-out basis. Our future tutorials will help you understand the effects of this behavior, giving you a solid understanding billing in LeashTime.

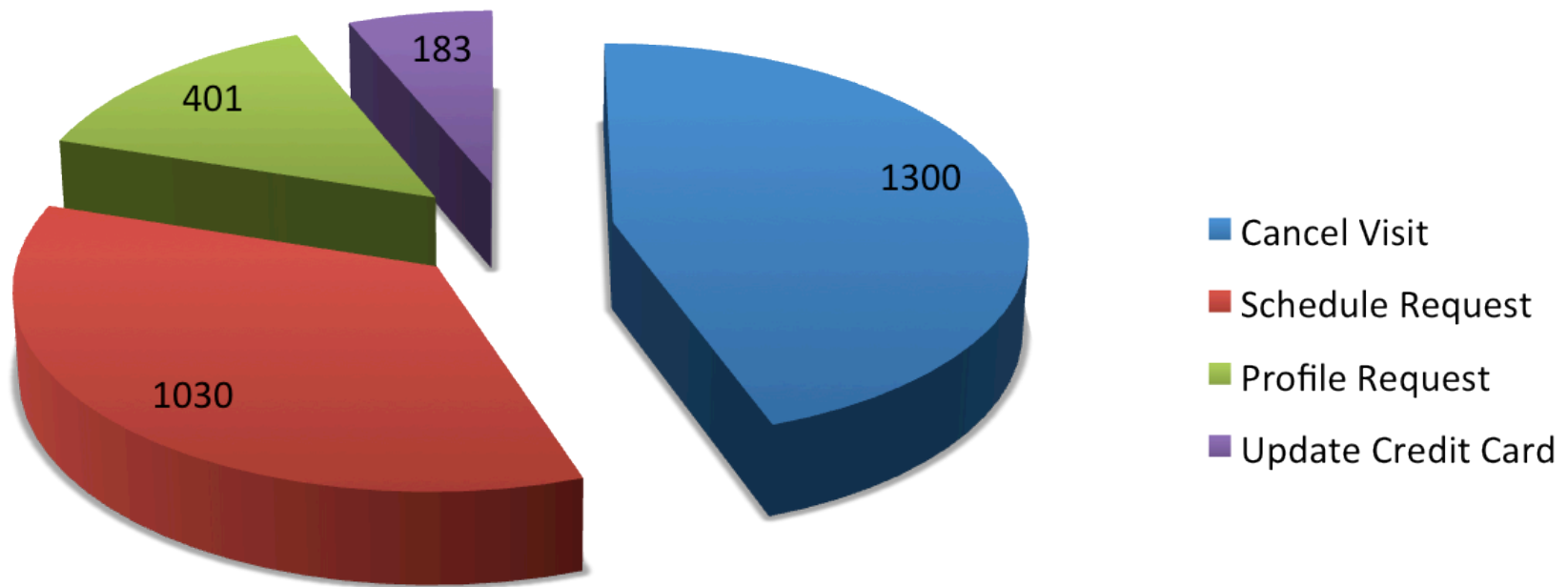
Regular Per-Visit Recurring Schedule Clients					
Client	Invoice Status	Payment Due	Credits	Net Due	Payment
<input type="checkbox"/> Nelson Amsden	<a href="#">View</a> <a href="#">History</a>	\$ 2,580.00	\$ 10.00	\$ 2,570.00	<a href="#">Pay</a>
<input type="checkbox"/> Troy Baade	<a href="#">View</a> <a href="#">History</a>	\$ 304.85	\$ 0.00	\$ 304.85	<a href="#">Pay</a>
<input type="checkbox"/> Winston X. Barreiro	<a href="#">View</a> <a href="#">History</a>	\$ 2,667.00	\$ 1.00	\$ 2,666.00	<a href="#">Pay</a>
<input type="checkbox"/> Burt L. Barrington	<a href="#">View</a> <a href="#">History</a>	\$ 577.55	\$ 0.00	\$ 577.55	<a href="#">Pay</a>

Non-Recurring Schedule Clients					
Client	Invoice Status	Payment Due	Credits	Net Due	Payment
<input type="checkbox"/> Allan Acre ←	<a href="#">View</a> <a href="#">History</a>	\$ 170.00	\$ 0.00	\$ 170.00	<a href="#">Pay</a>
<input type="checkbox"/> Miquelina S. Aldridge ←	<a href="#">View</a> <a href="#">History</a>	\$ 1,084.20	\$ 0.00	\$ 1,084.20	<a href="#">Pay</a>
<input type="checkbox"/> Rickie Allman ←	<a href="#">View</a> <a href="#">History</a>	\$ 0.00 (PAID)	\$ 0.00	\$ 0.00	<a href="#">Pay</a>
<input type="checkbox"/> Damien Alonso ←	<a href="#">View</a> <a href="#">History</a>	\$ 82.00	\$ 0.00	\$ 82.00	<a href="#">Pay</a>



# Report: Pet Owner Use of LeashTime

## LeashTime Client Account Requests – February 2012



Roughly half of all LeashTime businesses allow their clients to manage scheduling and profiles. We recently analyzed this activity and tried to quantify the time savings of granting clients access online to LeashTime.

Overall, we have had few problems with clients accessing LeashTime. We had spent a lot of time re-working the user experience for clients. For instance, both petsitting business owners and clients can schedule visits but if you look at how the scheduling is done, they are pretty different experiences. With business owners, we can create more complex (and powerful) interfaces since we know you will invest a few hours to master them. By contrast, we have 5 minutes of a pet owner’s attention.

The pie chart above shows a breakdown of the various client account requests made in the month of February. After analyzing the usage trends, we believed that if we could make LeashTime incredibly easy-to-use and convenient for pet owners, we could make your businesses much more efficient. We decided that we needed to figure out all the ways we could make client account access an incredible experience for your pet owner clients.

We have been working on a redesign of client account access over the last year. At present, one size fits all as far as configuration for your clients accessing the system. We want to re-work the client account functionality so that each client can potentially have a custom and different view based on the nature of your relationship with them (that is another thing we learned along the way, this is a highly personalized business).

For instance, clients who own dogs and only get dog walking services from you do not want to see cat sitting as an option. We also can learn quite a bit about the scheduling patterns of your clients.

They should not have to re-invent the wheel every time they would like to request a schedule. The system should intelligently know that the client schedules overnights and 3 x walks (with 2 on the first day and 1 on the last day) when going out of town. A lot of you also have quite a few pricing rules (if 30 minute walk is on a weekend, evening and the client is a 3 x week regular than the price should be \$15, not \$17 + \$3 surcharge).

Type of Request	Manually Process	System Process
Cancel Visit	2 minutes	1 minute
Profile Update	15 minutes	1 minute
Schedule Request	10 minutes	4 minutes
Credit Card Update	10 minutes	0 minutes

We attempted to quantify the benefits of allowing your clients to manage their accounts online. The above table is an estimate of the amount of time LeashTime businesses saved in February as a result of allowing clients to access LeashTime to manage their profiles and schedules.

Total estimated time savings: over 250 hours. If you consider that your rate for a minute walk is around \$17, this translates into \$8,500 in savings.

# Tutorial: Sending Invoices

There are multiple locations in LeashTime where you may send out an invoice to a client. Each invoice you send out to clients is logged in the **Account** tab of the client profile.

## Batch Invoicing

### Billing

Start Date  End Date   Include all visits

Prepayments due by: May 31

**Mail Statements**

There are no Prepayment Invoices to be mailed.

**Payments Due**

Select All Deselect All

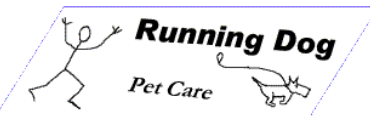
Client	Invoice Status	Payment Due	Credits	Net Due	Payment
<input type="checkbox"/> Allan Acre	<input type="button" value="View"/>	\$ 170.00	\$ 0.00	\$ 170.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Miquelina S. Aldridge	<input type="button" value="View"/>	\$ 1,070.00	\$ 0.00	\$ 1,070.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Damien Alonso	<input type="button" value="View"/>	\$ 82.00	\$ 0.00	\$ 82.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Nerissa Ammons	<input type="button" value="View"/>	\$ 400.00	\$ 0.00	\$ 400.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Nelson Amsden	<input type="button" value="View"/>	\$ 3,028.00	\$ 0.00	\$ 3,028.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Kathrine Arehart	<input type="button" value="View"/>	\$ 80.00	\$ 0.00	\$ 80.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Tyrone Arjona	<input type="button" value="View"/>	\$ 105.00	\$ 0.00	\$ 105.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Allan Austria	<input type="button" value="View"/>	\$ 499.00	\$ 0.00	\$ 499.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Troy Baade	<input type="button" value="View"/>	\$ 1,133.25	\$ 0.00	\$ 1,133.25	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Kurt Backes	<input type="button" value="View"/>	\$ 900.00	\$ 0.00	\$ 900.00	<input type="button" value="Pay"/> <input type="button" value="E"/>
<input type="checkbox"/> Winston X. Barreiro	<input type="button" value="View"/>	\$ 3,115.00	\$ 0.00	\$ 3,115.00	<input type="button" value="Pay"/> <input type="button" value="E"/>

If you want to send out a batch of invoices for a given billing period (e.g. May 1 - Mar 31), go to **Clients > Billing** from the main menu bar.

You will then see a list of clients with outstanding balances for the next week. If you want to change the billing period (e.g. May 1 - May 31), change the start and end date and click **Show**.

LeashTime will calculate the amount owed by your clients during the billing period you have defined. This is the amount in the **Net Due** column (next to last). The **Payment Due** column shows how much they owe for the period, while **Credits** shows the available amount that can be applied to the **Payment Due** based on the current visits

or



Statement  
 Customer Number: 405  
 Invoice Date: 04/11/2012

Nerissa Ammons  
806 Hounds Chase Court  
Fayetteville, NC 28311

Please detach here and return with payment.

**STATEMENT**

Account Summary		Customer Number: 405
Nerissa Ammons	Current Charges	\$ 245.00
806 Hounds Chase Court	Tax	\$ 0.00
Fayetteville, NC 28311	Prior Unpaid Charges	\$ 0.00
	Payments & Credits	\$ 0.00
	<b>Amount Due</b>	<b>\$ 245.00</b>
	Date Due	Upon Receipt

**Prior Unpaid Charges**

No Prior Unpaid Charges Found.

**Current Charges**

Date	Time of Day	Service	Sitter	Charge
05/01/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/02/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/03/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/04/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/07/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/08/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/09/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/10/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/11/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/14/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/15/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00
05/16/2012	11:00 am-1:00 pm	Dog Walk	Ali N. Coyer	\$ 10.00

**SITTERS** **CLIENTS** **ADMIN** **LOGOUT**

New Client  
Client List  
Invoices  
Billing

scheduled. If you click the View button, you will see the actual invoice preview with an itemized list of visit charges.

The Payment Due will include any unpaid visits prior to the start date of the current billing period.

When you are ready to send invoices out, click the box next to each name (or use **Select All**) and then click **Email Statements to Selected Clients**. LeashTime will take a few seconds per invoice to email (if you have selected a large number of clients, this may take a few minutes).

## Send out a Single Invoice

**Client: Nerissa Ammons**

Account Balance: PAID E-Payment: None on file.

Basic Info Address Pets Home Info Emergency Custom **Services** Billing Account Communication

**Visits** (hide)

Starting: 05/01/2012 ending: 05/31/2012  Last Week - This Week - Next Week - Mar - Apr -

23 visits found. Revenue: \$ 245.00 Commission: \$ 196.10

Sitter	Date	Time Window	Service	Charge	Pets
Martha	05/01/2012 Tue	11:00 am-1:00 pm	Dog Walk	\$ 10.00	All Pets
Note: [START]					
Martha	05/02/2012 Wed	11:00 am-1:00 pm	Dog Walk	\$ 10.00	All Pets
Martha	05/03/2012 Thu	11:00 am-1:00 pm	Dog Walk	\$ 10.00	All Pets

You may need to send out a single invoice without regard to your billing cycle. This most often occurs when you create a petsit schedule and then immediately send out an invoice. To do this, make sure you are in the client's **Services** tab. Set the date range for which you would like to invoice and click **Show**.

Click the envelope with the \$ symbol icon. This will generate an invoice statement that you can email to the client. It is the same invoice that you would have sent out in batch (assuming same date range).

Next month, we will drill down on some of more advanced aspects of sending out invoices.