



The Monthly Poop

An Introduction to Jody Smith

New Released Features

- Breed picker for pets
- Sitter Hourly Pay (limited)
- Edit Sitter Pay Record
- More accurate GPS reading
- (See Wish List article)

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.**



We are happy to introduce a new member to the LeashTime team. Jody is a petsitter and runs Lake Minnetonka Pet Sitters. She previously had a similar role with Bluewave.

Our business has grown dramatically and rapidly over the last 6 months. Gone are the days where we could talk all day about a minute detail in LeashTime. We want and need that time back to keep improving the product and improving your work lives.

We were having difficulty keeping up, so we are very excited to have Jody join us to do sales and, eventually, support. Matt and I can focus on improving the product and plowing through the Wish List.

SUPPORT ISSUES

Please remember that our support is unlimited. Feel free to contact us at any time with questions or concerns you have about the system.

Providing you with great support is our number one objective everyday. After all, what good is an elaborate system designed to vastly improve your working if you can't figure out how to use it. I don't think this was some sort of strategic business decision or we read that all great companies have phenomenal support in some business magazine. It was much simpler.

LeashTime represents our pride in craftsmanship. For several years, we did not see a penny from LeashTime. We weren't hired guns

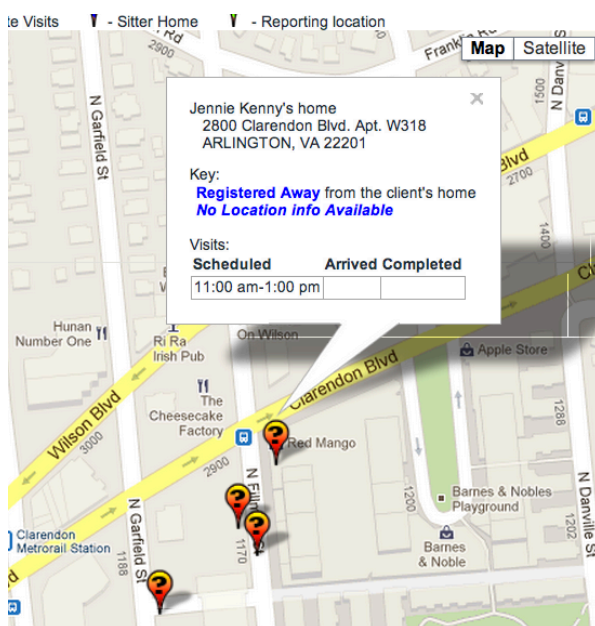
(been there and done that), we didn't answer to "management" in some endless Dilbert-esque parallel universe, and we didn't think this was going to be some 90's style hot initial public offering. We just had a set of problems to solve. And if we successfully solved those problems, our product would make a difference in the world. It would improve people's lives. It would improve the lives of the pets they cared for.

We are supposed to make your lives easier not harder. Use our support to get what you need to make sure LeashTime is making your life better.

POINTERS (NOT THE DOG BREED)

TRACK SITTERS ON MAP

On the Home Page, in Detail View, click the **Map** button next to a sitter name. This will display a map showing the sitter's home location, client locations and GPS coordinates that were obtained, either from check-in or mark complete of visit. If you click on the client location, a detailed display box will appear.

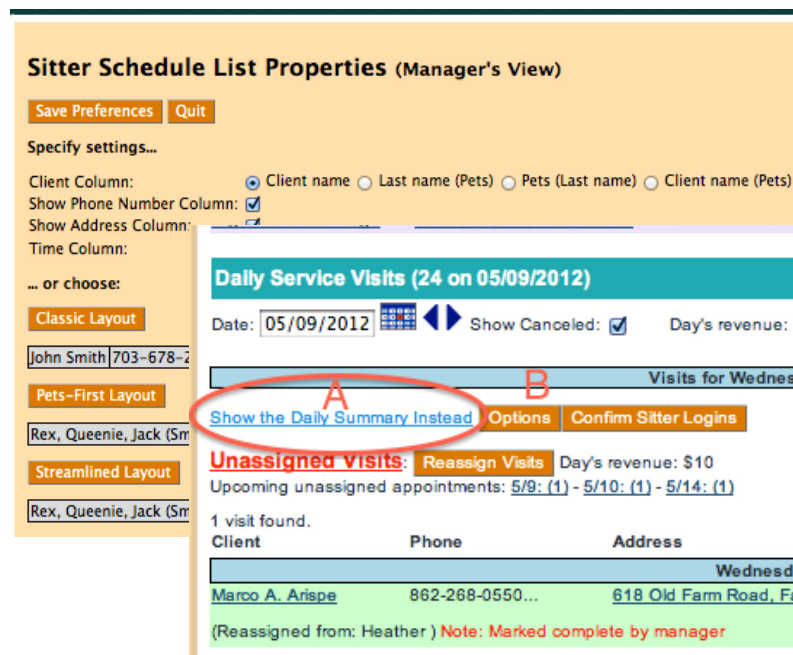


CUSTOMIZE YOUR HOME PAGE

There are several ways to customize your home page.

First, you can switch between a Summary or Detail mode. Click the **Show Daily Summary Instead** link (A).

Second, you can click on the Options button (B) to change the visit details shown in the Full Home Page mode. A popup will appear allowing you to change the displayed fields.



Daily Service Visits (24 on 05/09/2012)

Date: 05/09/2012 Show Canceled: [X]

Show the Full Home Page Instead Confirm Sitter

Day's Revenue including canceled visits: \$ 330. Sitter Login Report

| | |
|---|----------|
| Unassigned (1 visit): | \$ 10.00 |
| Barbara (3 visits): | \$ 30.00 |
| Garcia (2 visits): | \$ 54.00 |
| Garret (6 visits): | \$ 76.00 |
| Heather SITTER TIME OFF: all day | |
| Kendra (5 visits): | \$ 70.00 |
| Kimberly (3 visits): | \$ 38.00 |
| LeAnne (1 visit): | \$ 14.00 |
| Martha (3 visits): | \$ 38.00 |

Basics of Billing

Part II - I'm just a lonely old Bill(able)...

Last week, we touched on how LeashTime works with regard to recording payments and applying those payments. This week, we are going to describe how a payment is handled.

When you record a payment in LeashTime (either check/cash or credit card), we apply that payment to outstanding billables.

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

To see the flow of how a payment is processed in LeashTime, take a look at the diagram to the right.

In the screen shot below the diagram, we see exactly how LeashTime records and applies the payment to visits.

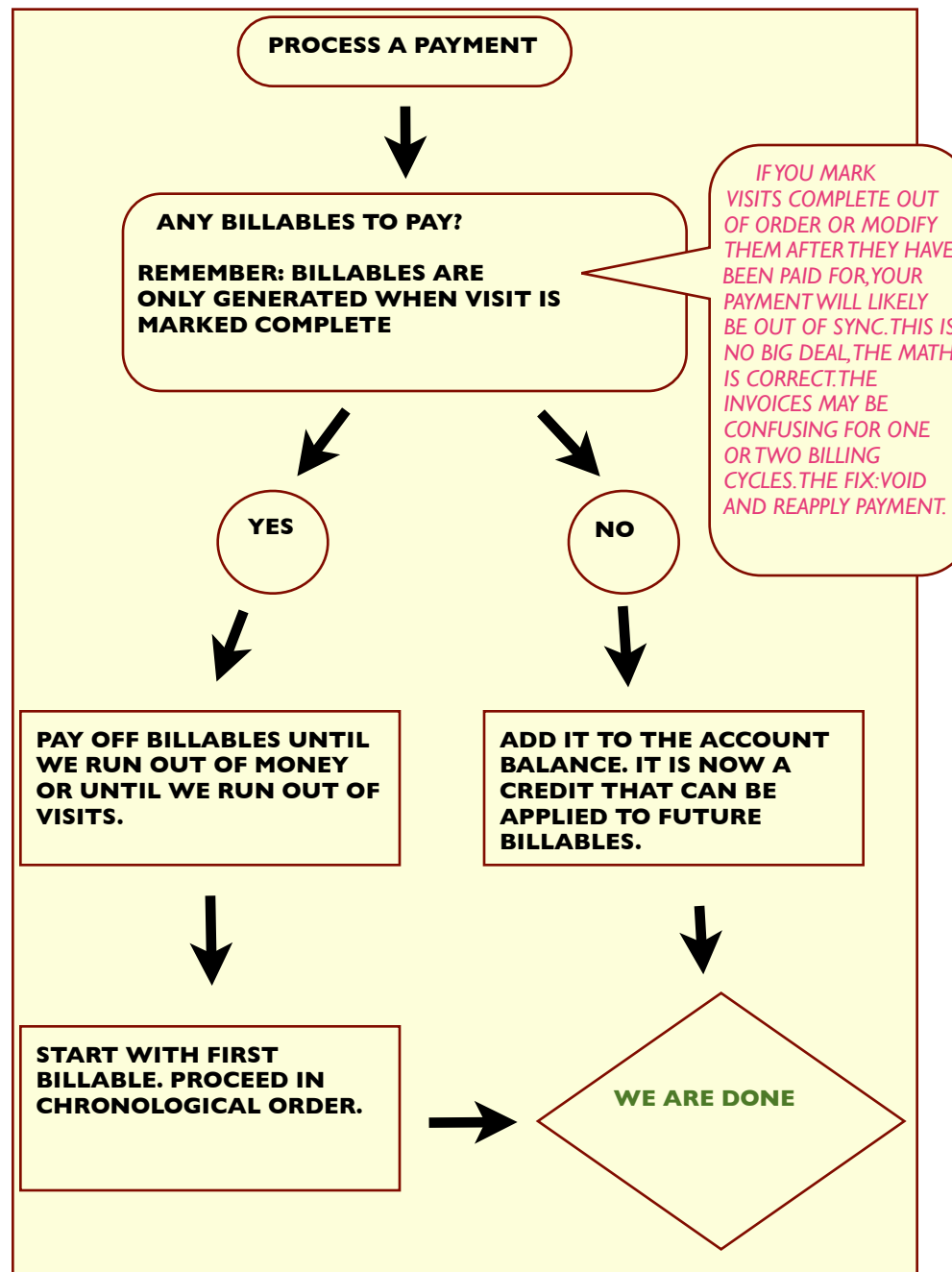
We do not apply payments to invoices. For LeashTime, invoices merely represent an arbitrary group of visits. Some of them may be paid and some of them may be unpaid.

We apply payments to individual visits on a first-in, first-out basis. [See screen shot below].

If you understand this, it will make understanding the entire LeashTime accounting much easier.

Of course, as with any methodology, there are side effects.

One of the most common side effects is that payments will get out of sync and invoices will seem confusing. There is nothing wrong with the arithmetic and accounting, it just looks confusing. This will usually only last for one, or maybe two billing cycles. There is a relatively quick fix to re-sync your payments. Void the payment, then record it again. Next month we will detail situations where payments are out of sync.



| Date | Time | Description | Sitter | Debit |
|------------|------------------|--------------------------------|-------------|------------------|
| 03/01/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | | \$ 10.00 |
| 03/02/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | | \$ 10.00 |
| 03/05/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/06/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/07/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/08/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/09/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/12/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/13/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/14/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/15/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/16/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/19/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/20/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/21/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/22/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/23/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/26/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/27/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/28/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/29/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 03/30/2012 | 12:00 pm-2:00 pm | Dog Walk (281) | Les Mcclung | \$ 10.00 |
| 05/10/2012 | | Payment #281 | | \$ 220.00 |
| | | Total | | \$ 220.00 |

Featured Feature

CLIENT FLAGS

Client flags are a powerful feature that allows you to define and apply icons to client profiles. It is a visual cue about some unique attribute about a client.

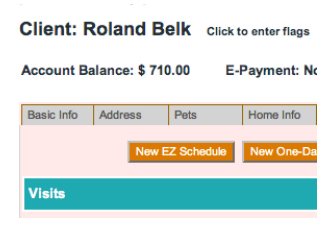
To utilize flags in your business, you must first set them up. Go to **Admin > Client Management > Client Flags**. Click one of the empty gray boxes and choose an icon.

After you select an icon, type a description into the **Title** field. Make sure to click **Save Changes**.

You have now defined a flag.

In order to use the flag and apply it to specific client, go to a client profile. Click the **Click to enter flags** link. You can type a custom note for the flag for this particular client.

Congratulations, you are beginning to use flags. You will see the flags displayed in appropriate, contextual locations within LeashTime.



The flags are visible when you receive a request from the client, on visit sheets for clients, in the mobile sitter app, in the EZ Schedule tool when you create visits. You can even use flags to create a filter for a mass email.

The possibilities for organizing your clients using flags are wide open.

Wish List Report

Ordinarily, the Wish List would not merit an entire article, but we wanted to comprehensively cover where things stand on various product development activities. Many of you have asked for specific functions / features and we wanted to make sure you had a realistic notion of where it stood in the pipeline.

If you have requested something and it does not appear on the list it does not mean we are not doing it. We may have simply overlooked it in creating lists upon lists over the last year or two.

When you ask for a new function or feature, we basically go through the following steps:

- (1) Is this something that could be solved with pre-existing functionality?
- (2) How generally applicable is the requested feature? Are there others who would find it useful (even if they don't know they need it)?
- (3) Assuming it hasn't been disqualified in step 1 or 2, we then determine what the magnitude of the requested change is. This has two components: how complex is it to do (which is really asking how long) and how risky is it (risk vs. reward).
- (4) We then discuss, sketch, diagram etc... how some new feature or function will actually be implemented. We have to weigh possible side-effects (e.g. adding sitter recurring time off and how that additional capability affects pre-existing time off functionality). We have a lot of debate and what-if arguments. A lot of times, we say "Well, sure for 90% of our users working it this way is fine but then we have those 10% who will have a problem with the lack of X, Y, Z." But to add X, Y, or Z will increase the risk substantially and take a lot of time. Can we live with this? Or do we need to add X or Y or Z or all?
- (5) Then we decide to do it. During the testing, we may discover that what seemed to work well on paper doesn't work well in the system. Or that we totally overlooked a minor thing but if we released it, our users would find it obnoxiously usable. We refine. We test. Testing can be interminable. Especially if it is high risk and there are many critical areas of the system that the new feature touches. We sometimes write a test plan to determine all the usage scenarios. Usually, we don't follow the test plan. Usually, it is impossible to truly determine all possible combinations of usage patterns and we could end up over-testing. The lesser evil is to test just enough and ensure that nothing catastrophic is likely to occur (and plan for rolling back if it does).
- (6) Then we push it out. Sometimes, just to a few people, sometimes to everyone. Sometimes with fanfare, sometimes with a wimper.
- (7) Then, we watch our emails carefully for support issues. We pray. We joke. We watch TV. We walk our dogs. If something is broken, we gear up and try to fix it. Fast. We apologize. We move to our next to-do on the list.

| Feature | Estimated Release Date | Description |
|---|------------------------|--|
| On-demand pay / credit card processing | late May | Clients do not have to have a credit card on file and can pay as they go by entering credit card information each time they are invoiced. |
| Package Pricing | Summer | Some of you charge clients upfront for services that have yet to be scheduled. Typically, these are called 20 pack, 10 pack, etc... LeashTime's accounting is inherently a good fit for this type of pricing model. There are some enhancements that would make the process much smoother and more automated. |
| Quickbooks | late '12 | We have gone back and forth on this. Will this cause more problems than it cures? LeashTime is designed to provide all the accounting functionality you need to run your day-to-day petsitting business. What are the critical and useful points of integration? |
| iPhone Real-Time GPS tracking for sitters | Summer | We have a version of real-time GPS tracking for sitters already developed for the iPhone. It is a native app. IT IS NOT AVAILABLE YET. The main issue is what do we do with all that real time tracking data. Most of you probably do not want to share this openly and freely with clients. We have to build some infrastructure to manage distribution of this information. |
| iPhone Native App Manager | Possibly Fall | We are not sure what should / should not be included in this platform yet. We have built some functionality for managers, but the iPhone is inherently limited to do all the things you can do in LeashTime. What should we include? What should we cut? |
| Enhanced Mapping Analytics | Fall | Right now you can view an individual sitters visits on a map and any GPS coordinates transmitted. We want to provide some more sophisticated analytic tools to overlay multiple sitters. Petsitting is a very geo-centric business. Many of you operate in very small geographic areas (services defined down to the zip code level) and the economics of your business are impacted by travel time, gas, etc... Having some tools to do geographic analysis might be a real winner. |
| Automatic surcharges for things other than holidays, like Gas | Not sure | We know there is a problem that needs a solution. Some of you want to go beyond holiday, weekends and working hours to automatically create surcharges. We want a solution too. |
| More token capabilities in template emails | Summer | Some of you want to put tokens in subject lines, some of you want more flexibility about which pets are included, some of you want to use tokens for sitters. The last one is a little tougher as we have to figure out how you tell us which sitter is associated with with visit. |
| EZ Schedule change the visit time in batch | Summer | This is pretty straightforward. |
| Enhanced Key Descriptions | Fall | There have been some pretty good requests about different ways in which the various key fields show up. We haven't spec'ed this out |
| Request Queue redesign | Fall | If you open up a request item from the Request Queue, you will see a dizzying array of buttons. They all are useful and helpful but they make the interface busy and confusing. Surely, there is a better way. |
| Filter Event Notifications Email | Fall | When you are notified via email about some new request in the Request Queue, you could easily be bombarded with emails. There is no finer filter to choose to receive only Schedule or Prospect requests. There should be. |

| Feature | Estimated Release Date | Description |
|----------------|------------------------|--|
| iPad bug fixes | late May | User interface fixes -- some views are not scrollable or appear in non-clickable areas. |
| New Billing | late May | Clearer reporting of recurring and non-recurring visits. Better access to account history. |

Tutorial: Price Changes

One of the biggest problems in transitioning in LeashTime are making sure your pricing is correct for clients. Almost everyone who uses LeashTime uses custom pricing for clients.

How Price is Determined

When you initially set up your service in LeashTime, you set the standard price for that service when it is scheduled. However, many times you want to set the pricing to be custom for a particular client (or groups of clients).

For instance, your standard Dog Walk - 30 minutes might be priced at \$18.00. If the client is a regular, recurring client, you may wish to only charge \$17.00 if they get more three walks per week. If they get more than four walks per week, you may want to set their pricing to \$16.00.

Custom Pricing

In order to charge different prices to different clients for the same service, you must use the client's price table to override standard

| Standard Price | Price | Standard Tax | Tax Rate % |
|----------------|-------|--------------|------------|
| \$ 10.00 | 20 | | |
| \$ 0.00 | | | |
| \$ 14.00 | | | |
| \$ 15.00 | | | |
| \$ 40.00 | | 8.875 % | |

prices. To do so, go to the client's profile and then to the **Billing** tab. You will see a list of services that you offer, along with your standard pricing. To set custom pricing for the client, type the new price into the empty field next to the custom price for the service. **Save**. That's it, this client has custom pricing.

Change the Price in Two Places

Pricing changes in LeashTime are not easy or very straightforward. We are working on improving the administrative management of pricing in LeashTime. It is not a high priority because once you

| | | |
|----------------------------------|-------------------------------|---|
| Garcia | 03/28/2012 Wed | 1 |
| Note: Marked complete by manager | | |
| Garcia | 03/29/2012 Thu | 1 |
| Note: Marked complete by manager | | |
| Garcia | 03/30/2012 Fri | 1 |
| Note: Marked complete by manager | | |
| Ongoing Schedule | | |
| Start Date: 03/01/2012 | Edit Schedule | |
| Days of Week | Time of Day | |
| Weekdays | 12:00 pm-2:00 pm | |

have your pricing set up properly, you generally do not need tools to manage it day-to-day.

If you have already set up a recurring (ongoing) schedule for a client with incorrect pricing, you must reset the pricing in the schedule. In order to do this, go to the client's **Services** tab and **Edit Schedule**. This will be in the **Ongoing Schedule** section.

For the service whose price you want to reset, unselect it (choose another service). Then, reselect it. Click the **\$** icon to make sure the new price change has taken effect. Set a date that you want the price change to take effect in the **Changes effective** field. **Save**.

Starting: 04/10/2012 end: 05/10/2012 [Show](#) [Select All](#) - [Deselect All](#)

Canceled visits are omitted. Visits shown: 23

| Date | Time of Day | Service | Sitter | Rate | Bonus | Base Charge | Adj | Discount | Tax | Final |
|--|------------------|------------|--------|------|-------|-------------|-----|----------|-----|-------|
| Svc: Dog Walk Sitter: --No Change-- Rate: 0.00 Bonus: Base Charge: 20.00 Adj: Discount: --No Change-- Set Values | | | | | | | | | | |
| 04/10/2012 | 12:00 pm-2:00 pm | R Dog Walk | | 6.50 | | 10.00 | | | | 10.00 |
| 04/11/2012 | 12:00 pm-2:00 pm | R Dog Walk | | 6.50 | | 10.00 | | | | 10.00 |
| 04/12/2012 | 12:00 pm-2:00 pm | R Dog Walk | | 6.50 | | 10.00 | | | | 10.00 |
| 04/13/2012 | 12:00 pm-2:00 pm | R Dog Walk | | 6.50 | | 10.00 | | | | 10.00 |
| 04/16/2012 | 12:00 pm-2:00 pm | R Dog Walk | Garcia | 6.50 | | 10.00 | | | | 10.00 |
| 04/17/2012 | 12:00 pm-2:00 pm | R Dog Walk | Garcia | 6.50 | | 10.00 | | | | 10.00 |

This may be all you need to do. However, if you want to change prices for visits in the past or for already scheduled petsit schedules (created with EZ Schedule), you will have to do the following:

- (1) Go to the client's **Services** tab
- (2) Click the **Options** menu and choose **Visit Details**
- (3) A popup window will appear
- (4) Set a starting and ending date range and click **Show**
- (5) Check visits for which you would like to change the price
- (6) In the **Svc:** dropdown menu, choose the same service (which will force LeashTime to update the new pricing)
- (7) Check the **Base Charge** field and make sure the new pricing is what you expect
- (8) Click **Set Values**
- (9) The pricing will be updated for these visits