Client Access to LeashTime: Before You Go Live: a Startup Checklist

LeashTime works best when it is configured properly to suit your business. These checklists cover the major items that need to be set up before you start scheduling service with Leashtime and before you offer LeashTime to your clients.

The first checklist below is one that you should complete before you schedule any client services in LeashTime. The time you spend going through it may save you much confusion and frustration later.

Setting your clients loose in LeashTime is a critical step, so we also offer the BEFORE YOU LET YOUR CLIENTS USE LEASHTIME checklist. Completing this checklist can help you introduce LeashTime to your customers with confidence.

BEFORE YOU GO LIVE WITH LEASHTIME (or schedule any client services)

Make sure:

Your Service List is set up with the standard prices and compensation (ADMIN > Service List)

Your sitters are set up (SITTERS> Sitter List)

Your sitters' login credentials are set up (Basic Info tab in sitter profile)

Custom pay rates for each sitter are set up as needed (Pay tab in the Sitter profile)

Custom prices are set up for each client as needed (Billing tab in the Client profile)

Custom client fields (extra fields for each client) are set up (ADMIN > Client Management > Custom Client Fields)

Custom pet fields (extra fields for each pet) are set up (ADMIN > Client Management > Custom Pet Fields)

Surcharges for holidays and other times are set up (ADMIN > Surcharges)

The standard tax rate (if any) is set (in ADMIN > Preferences > Billing Preferences)

You have set up the desired Time Frames (ADMIN > Client Management > Named Time Frame List)

You have set up the system to email sitters their schedules (ADMIN > Preferences > Sitter Schedule Notifications)

You have set up the system to allow sitters to use the Mobile Sitter App if desired (ADMIN > Preferences > Sitter User Interface)

You have set up Event Notification to receive emails when requests are received (ADMIN >

Communication Preferences > Event Email Monitors)

To contact support@leashtime.com

BEFORE YOU LET YOUR CLIENTS USE LEASHTIME

Make sure:

You have completed the BEFORE YOU GO LIVE WITH LEASHTIME Checklist above

Your Client Service List (the list of services the client sees when she schedules) is set up (ADMIN > Client Management > Client Service List)

You have credit card preferences set up (if you accept credit cards)

Your business's Credit Card Merchant Info is set up (in ADMIN > Preferences > Billing Preferences)

Your Credit Cards Accepted list is set up (in ADMIN > Preferences > Billing Preferences)

You have your branded client login page set up (contact LeashTime Support)

You have your Prospective Client page (“Contact Us”) set up (contact LeashTime Support and set ADMIN > Preferences > General Business > Accept Prospect Requests to "yes")

You have your Pet Care Service Agreement set up if desired (ADMIN > Client Management > Service Agreement)

You have set up login credentials for each of your clients (Basic Info tab in client profile, or contact LeashTime Support to set up all at once)

You have TESTED THE CLIENT LOGIN:

Set up a test client.

Login as that client.

Schedule visits as that client (watch the training video if necessary).

Enter a credit card as that client (if you accept credit card payments)

Make sure you understand everything your clients will need to understand.

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To contact support@leashtime.com with any questions you have BEFORE you let your first client use LeashTime

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