Onboarding Guide

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Welcome to Time To Pet!

Thanks for joining Time To Pet, we're happy you're here! We recommend doing these steps in phases. Take a few minutes to review the steps and decide on a timeline that works for your business. You can always adjust this as you move throughout the process.

> *Customer Support Tip: Any sentence that is underlined is a clickable link that will take you to the relevant Time To Pet help article.*

Here's a worksheet that you can fill out to help you plan, implement, and refer back to throughout the process:

Your Implementation Plan Outline

The how-to of these steps is below in your Onboarding Guide.

Phase 1: Initial Setup

Suggested timeframe of 1-2 weeks. Start date: Completed date:

- Use test clients and schedule events from both the admin side on the Scheduler and by logging in as a client and requesting services via the Client Portal and Mobile App.
- Approve Pending Requests from test clients onto the Scheduler.
- Visit your Schedule Blocks located in your Client Settings. Configure these and log in as your test client to see their view of these blocks (you can access the client's view on their profile via the Quick Actions menu).
- Configure your Mobile App settings and run a few events on the App. Send post-visit reports and Visit Report Cards. Please keep in mind that the Mobile App is built for staff to complete events and for clients. If you need to perform any admin functions in the field, you can use the mobile version of timetopet.com on your device.
- Create Templates for recurring clients. Use the Schedule A Trip to schedule multiple events for a client.

Phase 2: Settings & Configuration

Suggested timeframe of 1-2 weeks. Start date: Completed date:

- Visit your Company Settings and customize your Client and Pet Fields.
- Add your contract/service agreement to the Portal Policy section of your Client Settings.
- Configure your staff settings. These include Staff Permissions found under Staff Settings, as well as notifications that can be edited on each staff member's profile.

Phase 3: Beta Testing and Staff Onboarding

Suggested timeframe of 1-2 weeks. Start date:
Completed date:

- Use a small group of clients to act as “guinea pigs” for running tests in Time To Pet. Be sure to uncheck “Send Client Welcome Email” if you do not want them to access the Portal during testing. Otherwise, send this email so they can visit the Portal and provide feedback.
- Use client feedback to identify any challenges/obstacles with using the Portal and Mobile App. We also have help documentation in our Knowledge Base that you can send them.
- Add staff members and have them activate their accounts and download the Mobile App.
- Staff members should spend some time exploring both the Portal and Mobile App. Use test data first to have them complete test walks on the Mobile App and send Visit Report Cards.

Phase 4: Launch!

Launch date:

- Confirm that all settings match your business.
- Configure Client Portal Tag and New Client Account links if desired and add to your website.
- Send clients their Welcome Email if you want them to use the Portal/Mobile App. You can do this from the profile via the Quick Actions menu, or by sending an Email Campaign in the Messages center. We can provide you with a template that will include an activation link for all of your clients as well as information on downloading the Mobile App.

We have several categories of tips as you work through your Onboarding Guide:

🔑 Onboarding Tips: Tips from our Onboarding team (the key icon)

⚙️ Customer Support Tips: Tips from our Customer Support team (the gear icon)

💡 Expert Tips: Advanced tips by the experts (the lightbulb icon)

🐾 FAQs: Frequently asked questions (the paws icon)

🔑 *Onboarding Tip: At Time To Pet, we've worked with customers in many different parts of their pet care provider business' journey. Whether you've just opened a brand new business or are transitioning from another software, we want to make your experience with learning Time To Pet as easy as possible. Our guide is intended to help you through the onboarding process from all we've learned along the way helping customers just like you!*

Phase 1: Initial Setup

Getting Set Up in Time To Pet

Before we jump into your new account, let's set up three different important parts of Time To Pet. First, let's add a client. Next, we will create a service, and finally, we'll work on scheduling an event.

- [ ] **Add a test client -** Every great pet sitting or dog walking business needs clients! We **strongly** recommend creating a “test” client when you first get started with Time To Pet. This client is usually named “John Doe” or something similar and you can use your personal email address, as well as add your pets.

We’ve put together a short video showing you how to create your first client. Check out our help article for Adding A Client for more info.

> 💡 *Expert Tip - If you skip sending the client welcome email, you can always send it later. Here is the help article on how to do this.*

- ☐ **Create a service -** After creating a test client, we recommend creating a new service. Having a service is required for scheduling events in our system. If you’re not quite sure about what services you will offer, you can create a test service like “Dog Walking” or "Cat Sitting" for now. Check out our help article for Creating A Service for more info.
- ☐ **Schedule an event -** Now that you have a client and a service, let’s schedule an event. Keep in mind that scheduled events are linked to invoices in Time To Pet (we will review this more in our next steps). Creating an event will automatically generate an invoice! Check out our help doc on Scheduling An Event for more info.

Getting To Know Time To Pet

This first phase will include using any test data to schedule and complete events and generate invoices. Getting comfortable with scheduling and invoicing are crucial to feeling confident with using Time To Pet.

> 🔑 Onboarding tip: With everything, there is a bit of a learning curve and sometimes the to-do list can be a little daunting. We promise that after familiarizing yourself with these steps you'll have a great understanding of how Time To Pet works, and how best to use it to grow your business and it gets easier with practice!

Once you've created your test client and setup their account, you'll want to explore the Client Portal.

Expert Tip: Did you know that you can easily access the Client Portal as an admin directly from a client's profile? Navigate to the client's profile from the Clients button on the left menu bar. Then, click the blue Quick Actions menu and select "Login As Client" to see what they see when they are logged in to their portal. Need more help?

Check out Logging Into Client Portal As The Client.

Because scheduling and invoicing are intrinsically linked in Time To Pet, any scheduled service will have a generated invoice (Note: You can also bypass creating an invoice when scheduling a client by selecting "Do Not Invoice These Services" when creating an event).

Invoices are not automatically sent to clients, and you have complete control over Invoice Dates and Invoice Due Dates that can be set in your Invoice Settings and we'll cover each of these a bit later.

If you haven't already, take a moment to download the Time To Pet Mobile App from your Apple or Google Play Store and explore! Both clients and staff will use the same app - the app will recognize whether you are a client or staff member based on your login credentials. You can search "Time To Pet" in your app store to locate our app.

Expert Tip: You can use the same email address and the same password for staff and client accounts. To switch between staff and client you will need to log out of the app, and enter your credentials to log back in again and select which account you want to log in to.

Onboarding Tip: Please keep in mind that the Mobile App is built for staff to complete events while out in the field and viewing their schedule. The app is built for clients to request services, view their schedule, communicate with you, update their information or pay invoices.

> 💡 *Expert Tip: If you need to perform any advanced admin functions in the field, you can use the mobile version of timetopet.com on the mobile browser of your device.*

Whenever you are Scheduling An Event for your client, you are also creating the invoice for them at the same time. Here is our help article on Understanding Invoicing on Time To Pet if you would like to learn more about how this works. Here, we'll be pretending you've been asked to schedule services for a client (later, we'll be showing you how to approve requests for services that a client has requested.) Let's get started!

☐ **Test Exercise 1: Schedule An Event for a client.**

Clients use their Client Portal to send you service requests. To start, navigate to your test client, locate the blue Quick Actions button, and click to display the options. Select "Log In As Client" to log in as your test client, which will bring you into to their Portal. Then, click on the “Schedule” link at the top of the page. If you need a little more instruction, we have more information on Requesting Services in the Client Portal.

Requesting services as a client is a great way to learn what your client sees when requesting services in the app. We'll be using these services you request as part of the next test exercises. Later, we'll also be discussing how to adjust what the client sees when they're requesting the time for their visit.

☐ **Test Exercise 2: Scheduling an event the Mobile App as a test client.**

When a client makes a service request from their Portal, the services are not automatically added to your calendar. They are placed in your Pending Requests queue and must first be processed before they can be added to your calendar. When a client makes a service request, you will be notified via email with the details. To process the request, navigate to your Scheduler → “Pending Requests” tab. These pending requests that you see here are the requests you created when you logged in as your test client and requested services.

☐ **Test Exercise 3: Approve Pending Requests as an admin onto the Scheduler.**

> 💡 *Expert Tip:* Using the Client Portal or the Client App, your customers can request service appointments which significantly cuts down on the number of emails and phone calls you have to handle. However, If customers were able to request appointments at any time on any day, it could quickly get out of hand. As the business owner, you should be in control of your schedule, not your customers.

This is where Schedule Blocks come in. Schedule blocks allow you to specify pre-defined periods of time on a day by day basis that your customers can then choose from when requesting services. Instead of selecting a visit at 7am, your clients can select a visit in the Early Morning schedule block. This allows you to control what times and days you are available and guides clients to select the correct time to cut down on back and forth communication around scheduling.

> ⚙️ *Customer Support Tip: Need a little more help? We also have a Best Practices on Schedule Blocks article.*

> 💡 *Expert Tip: Do you offer overnights or boarding? We suggest reviewing our help article on Best Practices for Scheduling Overnights and Boarding.*

☐ **Test Exercise 4: Visit your Schedule Blocks located in your Client Settings. Configure these and then log in as your test client to see their view of these blocks in the Portal.**

Many aspects of Time To Pet's built-in invoicing can be configured to better suit your company's needs in Invoice Settings. This includes creating a default invoice note, setting invoice dates, and your default cancellation

fee. You can adjust any settings at any time if you're not ready to decide just yet!

- [ ] **Test Exercise 5: Visit your Invoice Dates and Settings to view the different options, and configure them if you're ready.**

Bulk Invoicing allows you to perform certain actions on multiple invoices at once saving you time and effort. Currently, you can email invoices, send confirmations, add manual payments (i.e cash/check), charge (only available if credit card processing is enabled on your account), apply credits to, and apply open payments to invoices in bulk. If you're just getting started, Bulk Invoicing might not be applicable just yet, but as your business grows, we think you'll find it a great help to know you'll have ability to perform actions in bulk!

Customer Support Tip: Learn more about Bulk Invoicing here.

FAQ: How do I automatically send an invoice? It's not currently possible to automatically email invoices to clients. However, it is possible to have invoices automatically show in a client's portal depending on your Client Settings → Portal Settings which we'll discuss here.

The first option is **Show Paid Invoices in Portal?** When enabled, clients will have access to their Paid invoices in the client portal. If payments and tipping are enabled, clients will be able to go back and add tips to their Paid invoices as well.

Show Unpaid Invoices? is the second setting you can adjust here. You have several options to choose from that can be adjusted at any time.

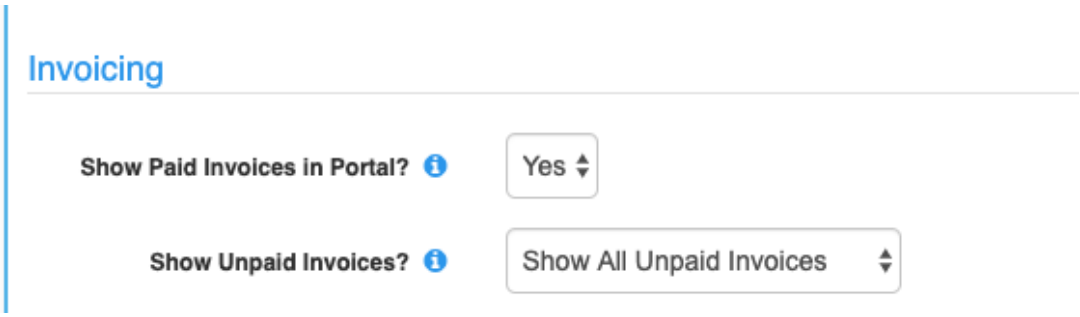
Show All Unpaid Invoices: All unpaid invoices will be shown to Clients, this also includes draft invoices (invoices that have not been emailed, are not due today, or in the future.)

> *Expert Tip: While showing all unpaid invoices is an option, occasionally clients with multiple invoices will pay an invoice out of order when this option is selected. You can always un-apply a payment and re-apply it to a different invoice, however if you select "Show Only Due Invoices" we've found clients are more likely to pay the correct and most recent due invoice, which cuts down on having to correct any mistakes.*

Show Only Due Invoices: Only invoices that are due today or in the past will be shown and *also* invoices that have been emailed to clients.

Show Only Emailed Invoices: *Only* invoices that have been emailed through Time To Pet will be shown (typically these invoices are sent via Bulk Invoicing, but you can also email them one at a time by opening an invoice and scrolling to the bottom and clicking "email invoice")

Never Show Unpaid Invoices: Unpaid invoices will never be shown to Client.



The Time To Pet mobile application allows your staff members to perform their services quickly and efficiently. The application is streamlined to provide your staff with the correct information at the correct time. As an administrator, you can configure time tracking and GPS tracking and optionally share this information to clients.

For more information on how to view time tracking and GPS data, see Viewing Time Tracking And GPS Data.

- [ ] **Test Exercise 6: Configure your Mobile App settings and run a few events on the App. Send post-visit reports and Visit Report Cards.**

After learning how to schedule an individual event for a client, you might be wondering how to schedule multiple events all at once, or how to set up recurring client schedules. We have two awesome tools for both purposes - Templates and the Trip Tool.

What are Templates? Imagine you have a client that has the same services scheduled week after week after week. A walk at 12:30 PM every Monday, Tuesday, Wednesday, Thursday, and Friday. Scheduling this client manually every week would be tedious and time consuming.

With a Template, you can setup these services once and have them automatically (or with the click of an approve button) added to your schedule every week, invoices are automatically generated, and you never have to wonder, "Did I forget to schedule John Doe's walks this week?"

Customer Support Tip: Learn more about Setting Up Recurring Services Using Templates.

Expert Tip: Do you need to edit events on a template you've already created? Here's how you can cancel or modify future events on a template. And, here's how you can delete a template.

- [ ] **Test Exercise 7: Create a test template for a client with reoccurring services. Then, edit it.**

The "Schedule A Trip" tool allows you to quickly and efficiently schedule intermittent services that take place over multiple days. For example, imagine receiving a call from your client requesting a Dog Walk at 7AM, 12PM, and 5PM from Monday until Friday of next week. With the trip tool, this can easily be scheduled in just a few clicks.

Customer Support Tip: Need a little more guidance? We also have a video on using the Trip Tool.

- [ ] **Test Exercise 8: Schedule a trip with the trip tool.**

Phase 2: Settings & Configuration of Time To Pet for your business

Keeping detailed and up to date records for customers is an important aspect of every pet service business. Time To Pet provides you with a standard set of fields to collect and store both client and pet information. You can also fully customize all of the information collected about your Clients and their Pets.

> *Onboarding Tip: Need a little more help with client fields? Check out our Best Practices article to learn more about how you can effectively customize your information fields to match your business.*

- [ ] **Test Exercise 9: Set up Client Fields.**
- [ ] **Test Exercise 10: Set up Pet Fields.**

The Portal Policy is a configurable set of terms that your customers must e-sign when accessing the Client Portal or Mobile App for the first time (otherwise known as a contract.) If the Portal Policy is enabled and text is added in the text box, your customers will not be able to use their portal until they agree and sign it. By default, no Portal Policy is set or enabled.

> *Expert Tip: Do you already have paper or PDF documents that your clients have signed? You can also upload those to their client profiles using our documents feature (you can also upload staff documents, as well as global documents!)*

> *Customer Support Tip: Would you like to see a sample contract? We have one you can view. We also have a blog on Pet Sitting Contracts - What You Need To Include if you need some ideas!*

☐ **Test Exercise 11: Review the portal policy feature and add your own policy if you choose.**

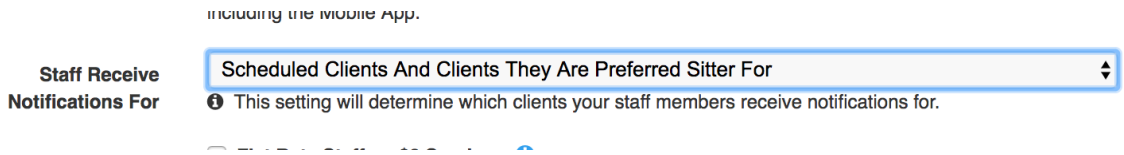
Here's where we'll review staff permissions, staff notifications and changing a staff member's role.

> *Onboarding Tip:* If you are a solo company or are not ready to add staff just yet, feel free to skip this section and come back to it at a later time!

Users in your company can have one of four roles: **Trainee, Staff, Manager or Admin.** The permissions of each of these roles can be customized even further using the Permissions settings in Time To Pet. Certain permissions are core to a user role and cannot be disabled/enabled. An overview of staff permissions can be found here.

☐ **Test Exercise 12: Review and adjust staff permissions.**

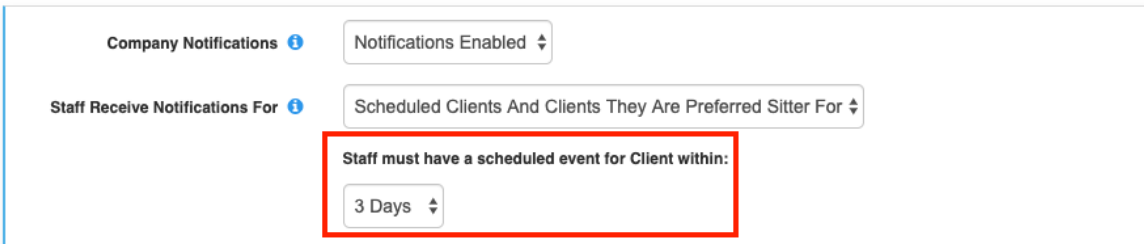
By default, staff receives notifications regarding clients they have been scheduled with and/or they are set as the preferred sitter for the client. You can also enable staff to receive notifications for clients only that they are set as the preferred sitter, as well as only clients they are scheduled for. You can select which option you would like by going into Settings - Advanced - Notifications and choosing from the drop-down field.



While also here, you can adjust how often your staff receive notifications for events they are scheduled for.

> *Customer Support Tip: Many of our customers prefer to turn this value down from Anytime to 3 Days or less. This means, if staff is scheduled for an event, they will only receive notifications for that client three days before the first event starts, and three days after the last event ends.*

Again, this setting can be adjusted at anytime should you want to change the value here!



Here's the full help article on Staff Notifications and how to adjust them.

You are also able to customize *which* notifications staff receives in the Bulk Notification Editor (Settings - Notifications → "Bulk Notification Editor" tab).

> *Customer Support Tip: The Bulk Notification tool works a bit differently than individually adjusting staff's notification settings, so we recommend reviewing the help article on Bulk Notifications here: https://help.timetopet.com/article/197-bulk-notification-editor*

You can also set notifications individually, on a staff by staff basis, by going to the staff's profile, edit details section and selecting the "Notifications" tab.

☐ **Test Exercise 13: Review and adjust staff notification settings.**

If you need to adjust a staff member's role, you can do so at any time following these steps: https://help.timetopet.com/article/122-how-do-i-change-a-staff-members-role

> *FAQ: Can I add staff members later? Yes! If you want to add staff at a later time you can using these steps: Add A Staff Member.*

Customer Support Tip: If you are currently on our solo plan, once you've added a team member you'll be automatically switched to our team plan. If you need to review pricing and billing for Time To Pet, you can view more information here: https://help.timetopet.com/article/52-time-to-pet-billing-pricing

Phase 3: Beta Testing with Real Clients and Onboarding Staff Members

Now that you've explored the software and gotten to know scheduling, invoicing, and the Mobile App, you can start beta testing with a small group of real clients and onboarding your staff members.

Onboarding Tip: Be sure to uncheck "Send Client Welcome Email" if you do not want them to access the Portal during testing. Otherwise, send this email so they can visit the Portal and provide feedback.

Have your "guinea pig" clients schedule test events from the Portal and Mobile App and approve their Pending Requests. Send test messages back and forth using the Conversation Feed. Using their feedback to identify any challenges/obstacles with using the Portal and Mobile App will be beneficial when getting the rest of your clients set up.

Customer Support Tip: We have an entire section in our Knowledge Base for your clients! This includes help articles for them on downloading the client app, using the conversation feed, entering their client and pet info, scheduling, managing their invoices and more. Those help articles are located here.

Add staff members and have them activate their accounts and download the Mobile App.

Staff members should spend some time exploring both the Portal and Mobile App. Use test data first to have them complete test walks on the

Mobile App and send Visit Report Cards.

Phase 4: Launch!

Now is a good time to make sure all of your Settings match your business, as well as use real clients to run test events and gather feedback.

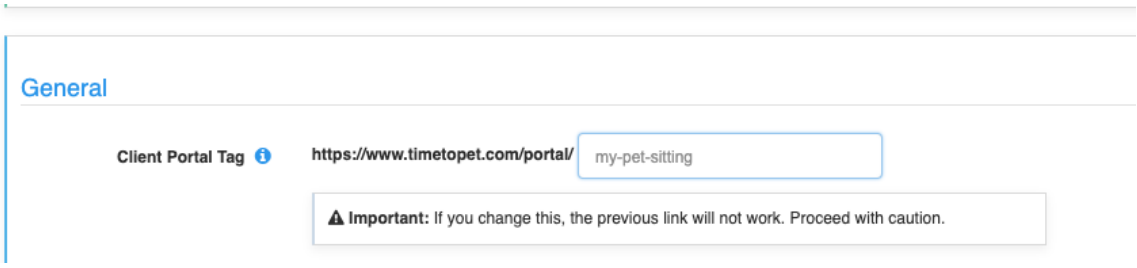
- Confirm that all of your Settings, Custom Messaging, Custom Client and Pet Fields, and Portal Policy look good and match your business.
- Configure Client Portal Tag and New Client Account links if desired and add to your website.
- Send clients their Welcome Email if you want them to use the Portal/Mobile App. You can do this from the profile via the Quick Actions menu, or by sending an Email Campaign in the Messages center. We can provide you with a template that will include an activation link for all of your clients as well as information on downloading the Mobile App. Please reach out and I am happy to provide this.

Onboarding Tip: You are welcome to schedule an onboarding call as needed!

If you have a website, you might be interested in adding a button for existing clients to log in to their client portals. This allows your clients to access the portal more easily, so they can request visits and process payments any time.

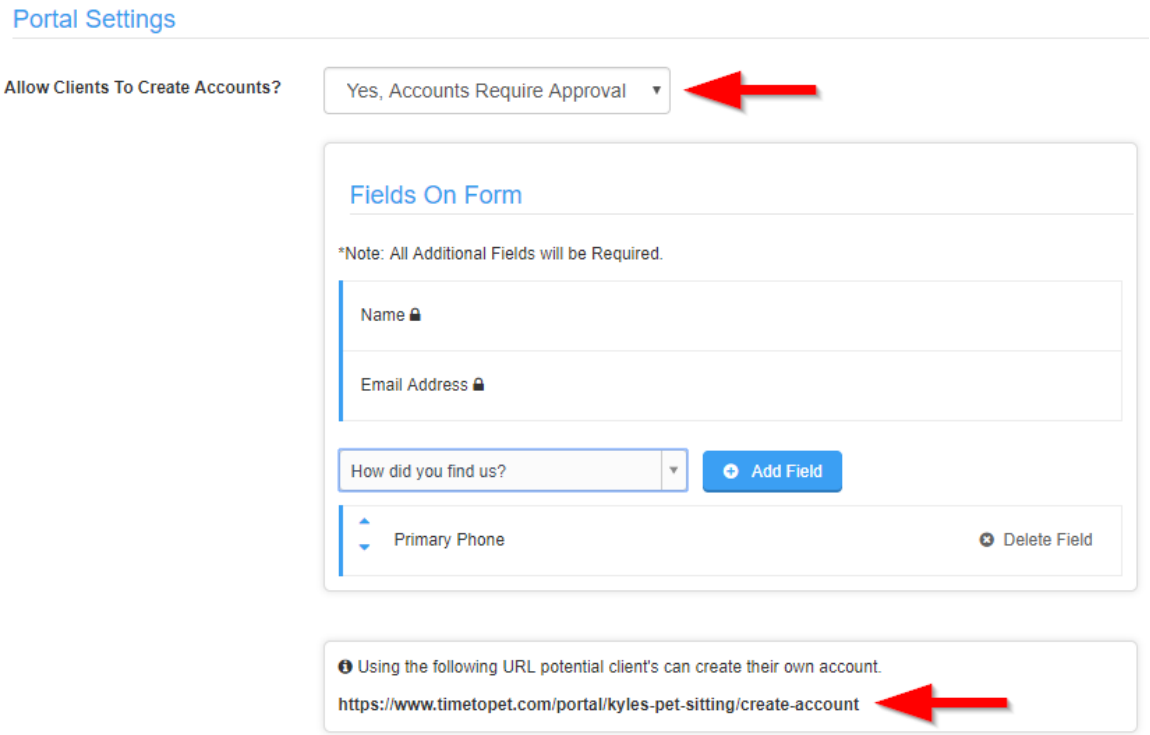
Onboarding Tip: A client portal tag is the unique address that will display your theme settings and branding when clicked on.

First, you'll need to set your Client Portal Tag in your Portal Settings.



Next, we have included instructions from several major website builders on how to add an external link to your website here.

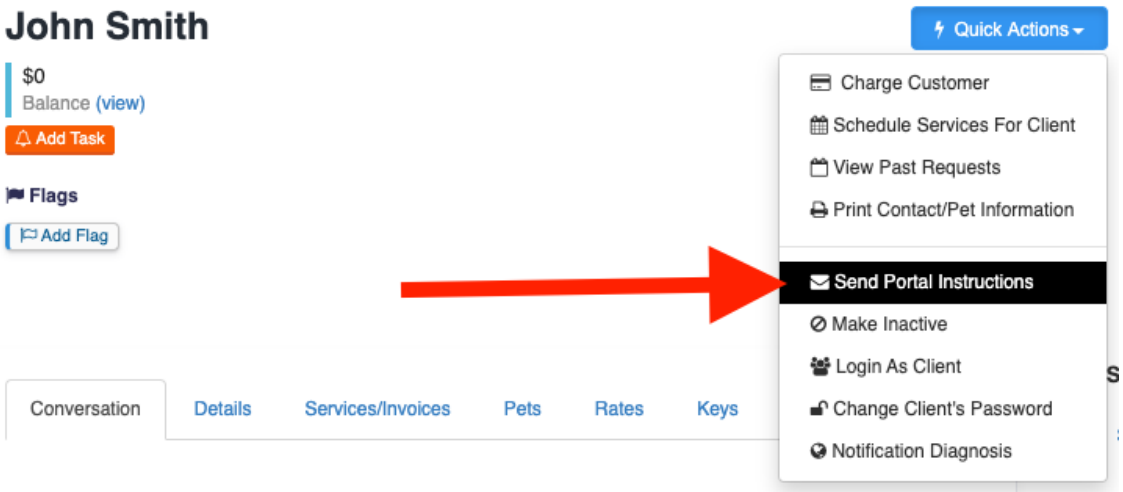
Time To Pet also provides the ability for you to add a New Clients link to your website. This will allow new clients to create an account directly on Time To Pet.



We have a help article outlining the steps to allow new clients to create accounts here.

Onboarding Tip: For more ideas on configuring your new client form, see our help article on Best Practices For The New Client Form.

Ready to send clients their Welcome Email to invite them to use their Portal and the Time To Pet app? You can do this one client at a time from the client's profile via the Quick Actions menu, or by sending an Email Campaign in the Messages center



> *Onboarding Tip: We have a template you can use to send a mass email to your client with instructions on how to activate their accounts. Just in case you weren't aware, you can send mass emails right through the Messages section of TTP. Just click the "Email Clients" tab. Here is our help article on sending mass emails to your clients as well: Sending Mass Emails to Clients*

And here is the template:

We are very excited to announce that COMPANY NAME is implementing new Pet Sitting Software to improve your experience as you use our services! The new software is called Time To Pet and all of our customers now have their very own Client Portal account on the system. Using your Client Portal, you can now provide real-time updates to all of your pet information, your information as well as request future services, view all scheduled events, view your invoices and more.

To activate your account, please visit https://www.timetopet.com/portal/activate and enter your email address

and click “Send Activation Email”. You will receive an email with a link to activate your account.

After logging in for the first time, please take a moment to review all of the information in the “Pets” section as well as the “My Info” section. If any information needs to be updated, please take a moment to update the info as well. If you have any questions about using the Portal, you can visit the Help Section (http://help.timetopet.com/collection/7-client-portal) or you can contact us directly.

Thank you again!

> *Customer Support Tip: Be sure to reach out to support@timetopet.com as you have questions!*

Congratulations on completing your Onboarding Guide! You've mastered the basics and you're ready to graduate!

From here, we would recommend checking out the following resources we have. There are also many advanced features you will find throughout our knowledge base as well. If there's something you need more help with, please feel free to reach out to us at support@timetopet.com, or visit our Support page, we're here to help!

Additional Resources

- Getting Started Guide
- Getting Started Video
- Time To Pet Knowledge Base
- Time To Pet Product Updates
- All Available Features
- Time To Pet Academy
- Time To Pet Courses
- Time To Pet Blog
- Time To Pet Support
- Advanced Demos