Welcome to Power Pet Sitter

This manual provides step by step details to help you set up your company on Power Pet Sitter. Screen shots are provided to simplify the instructions.

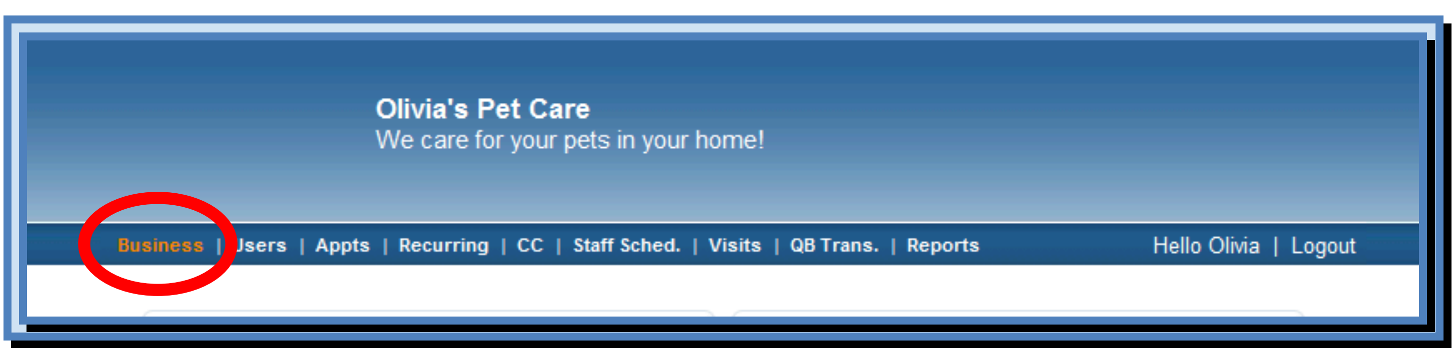
NOTE:

Before you begin, please ensure that you are using the correct internet browser for full functionality of Power Pet Sitter. If you are a PC user, Power Pet Sitter is compatible with Internet Explorer 6 or 7 as well as Mozilla Firefox. If you are a Mac user, Power Pet Sitter is compatible with Mozilla Firefox.

Our Tabs:

The following pages explain the steps to tailor each Tab to your company specifications. Tabs are ORANGE when you work within them.

Business Tab – Customize your Power Pet Sitter account within this tab.
Users Tab – Manage your client and staff users within this tab.
Appts Tab – Search for appointments within this tab.
Recurring Tab – A list of all of your recurring appointments will appear in this screen.
CC Tab – Power Pet Sitter integrates with the payment gateway authorize.net to charge credit cards.
Staff Schedule Tab – Review staff schedules individually or as a whole.
My Sched Tab (for staff) - When staff login under their unique usernames, they will be prompted to enter a date range for which they would like to review their schedule.
Visits Tab – Use this tab to mark new visits as confirmed as well as to mark visits after they have been completed.
QB Transaction Tab – Use the tab to search for transactions related to Quickbooks online.
Reports Tab – Use this tab to generate reports of your client, staff, and business data.



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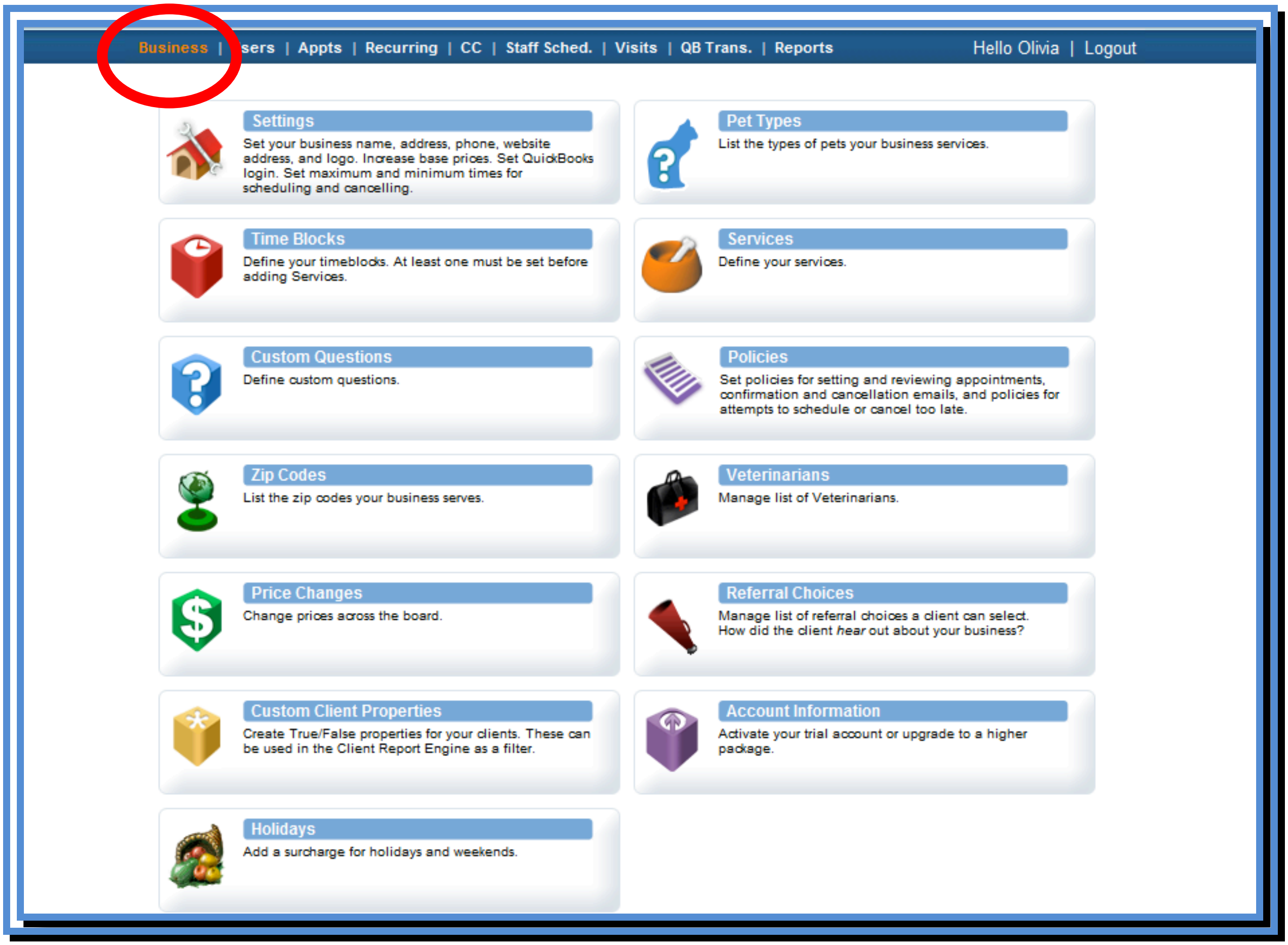
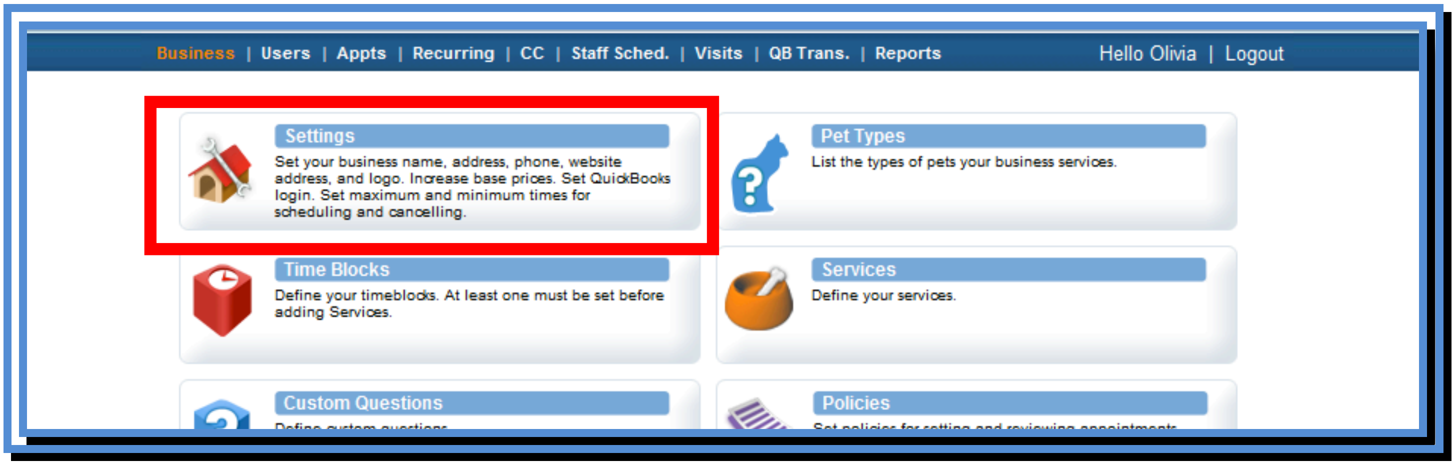
Business Tab – Customize your Power Pet Sitter account within this tab.

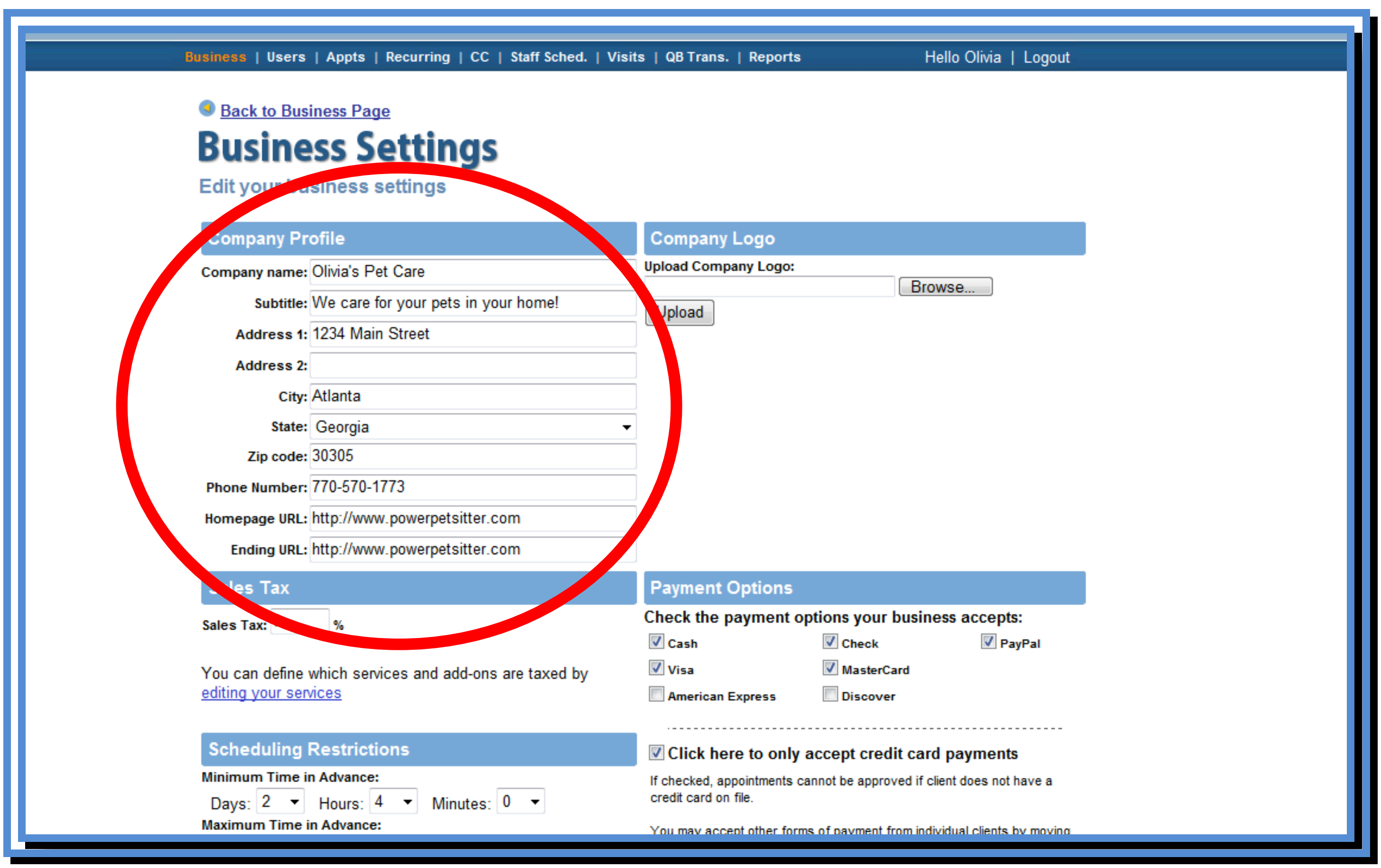


Settings - Set your business name, address, phone, website address, and logo. Increase base prices. Set QuickBooks login. Set maximum and minimum times for scheduling and cancelling.

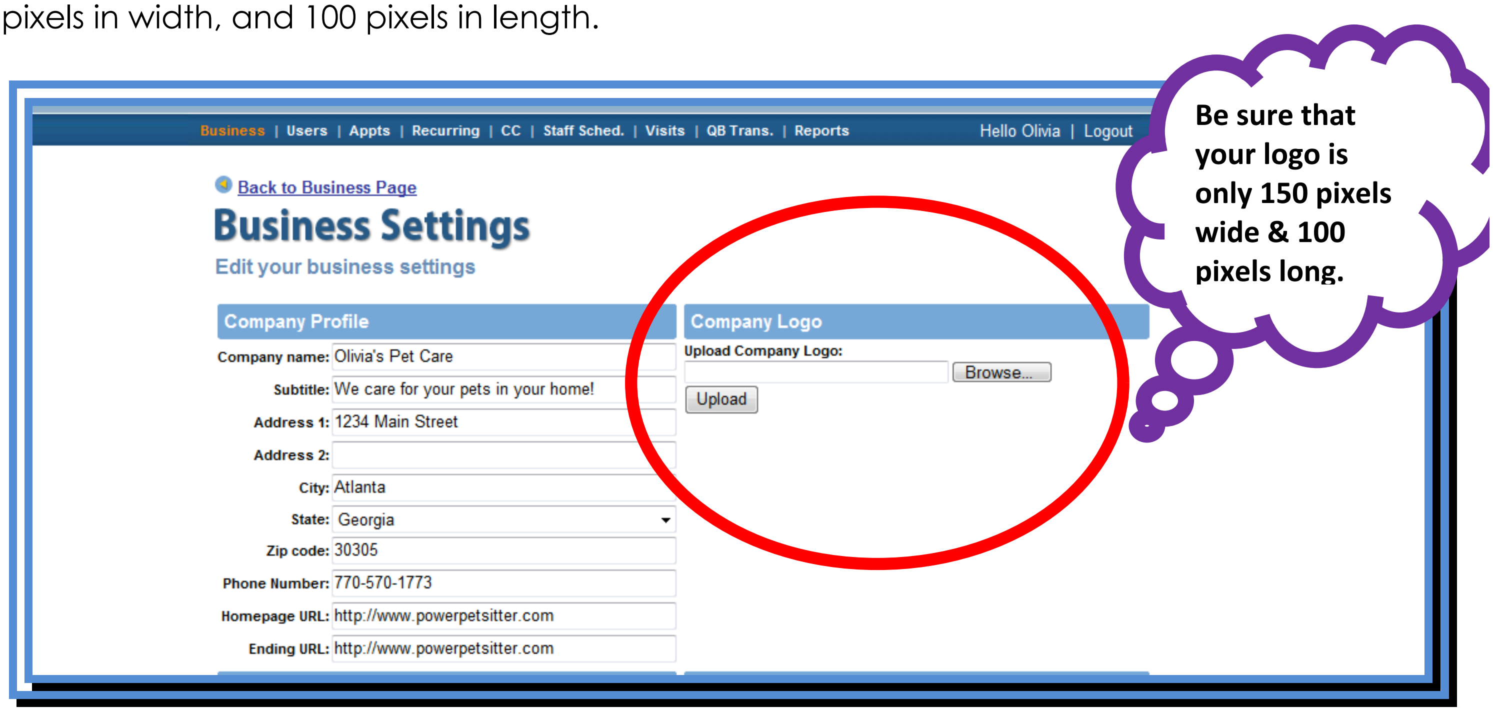


Company Profile – Enter information about your company, including business name, address, phone numbers, and website addresses. This information will appear on your unique Power Pet Sitter login page and in the banner at the top of the program when logged in.

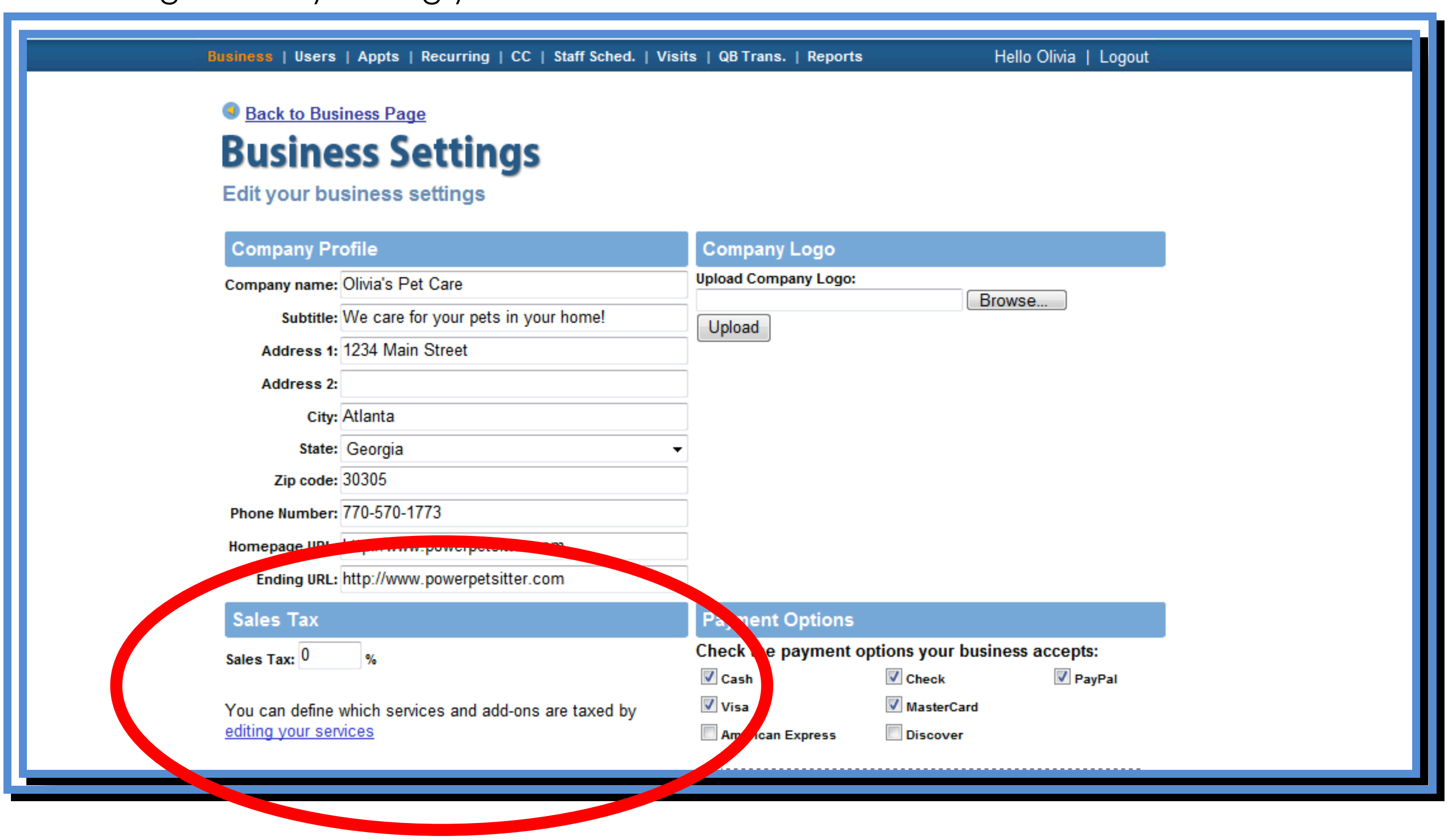
**The Ending URL is the website address that a user will be directed to once they log out of Power Pet Sitter.*



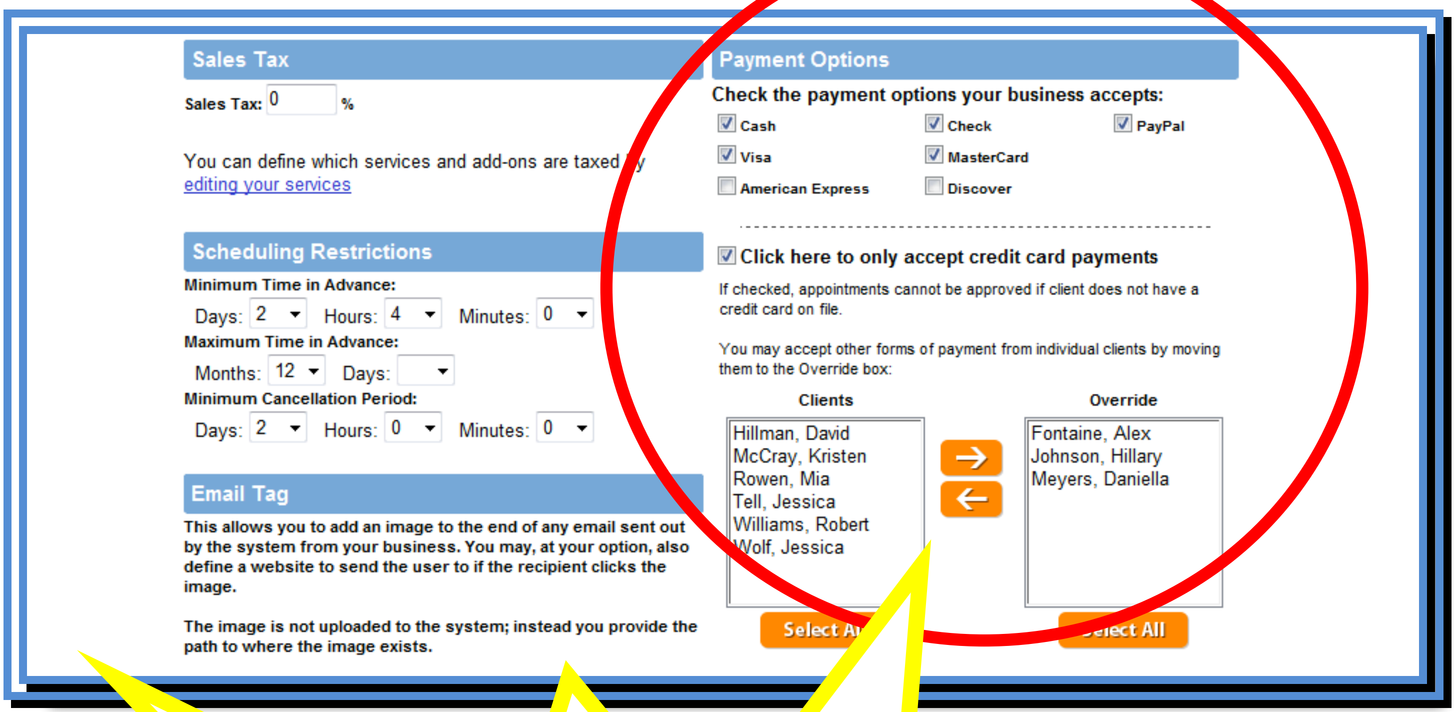
Company Logo – Upload your company logo here. Your logo may be no more than 150 pixels in width, and 100 pixels in length.



Sales Tax – If you live in an area where sales tax is charged on services, this is where you will designate the applicable sales tax amount. You can define which services and add-ons are to be charged tax by editing your services.

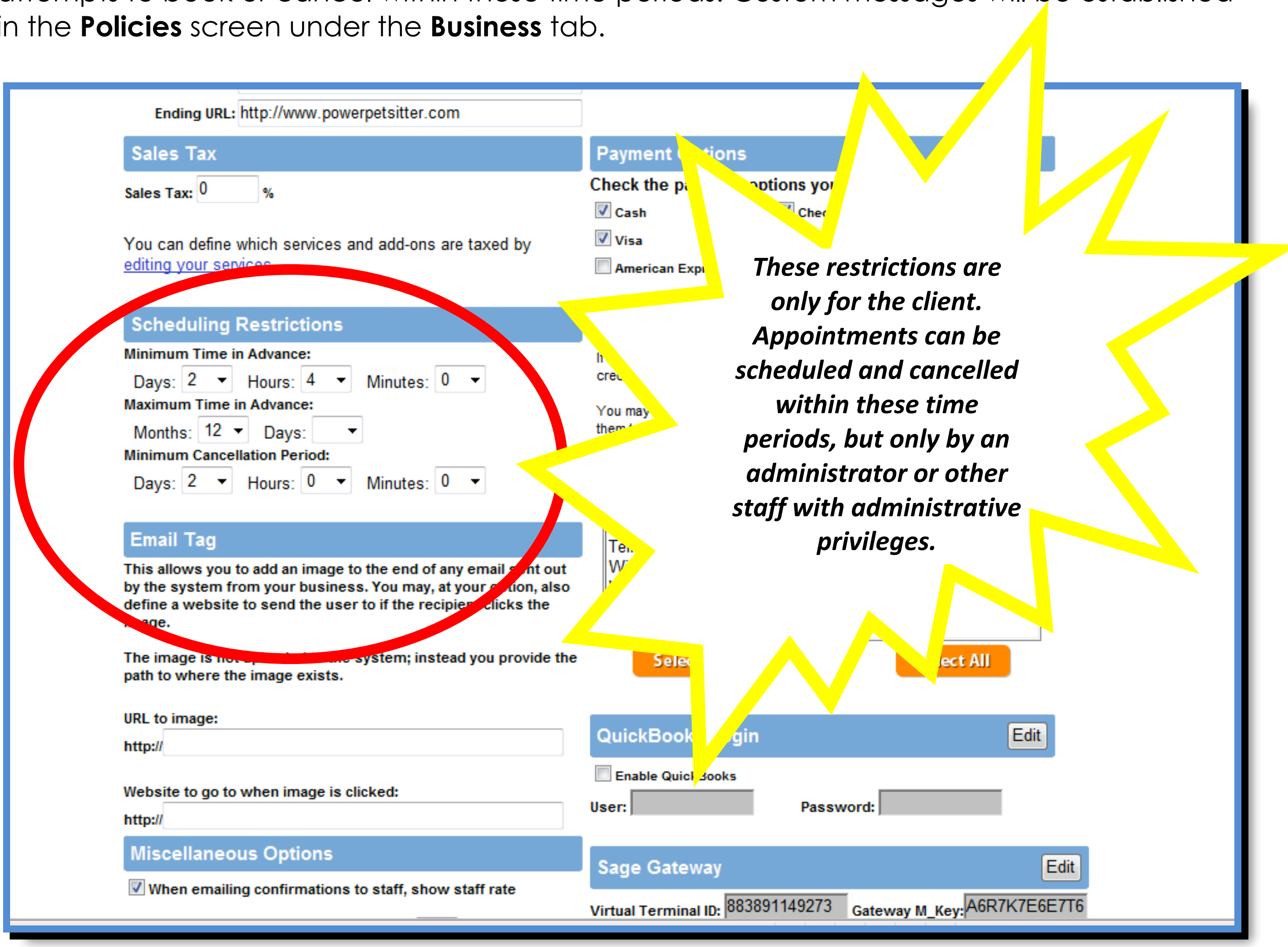


Payment Options – Indicate which payment options your business accepts. Payment options that you select here will appear in the client profile. You will assign a payment method for each individual client within their profile from the selections you make here. If you wish for your business to only accept credit card payments, you will need to check the box "Click here to only accept credit card payments". You may make this selection and still accept other forms of payments from individual clients by moving them from the Clients box, to the Override box.

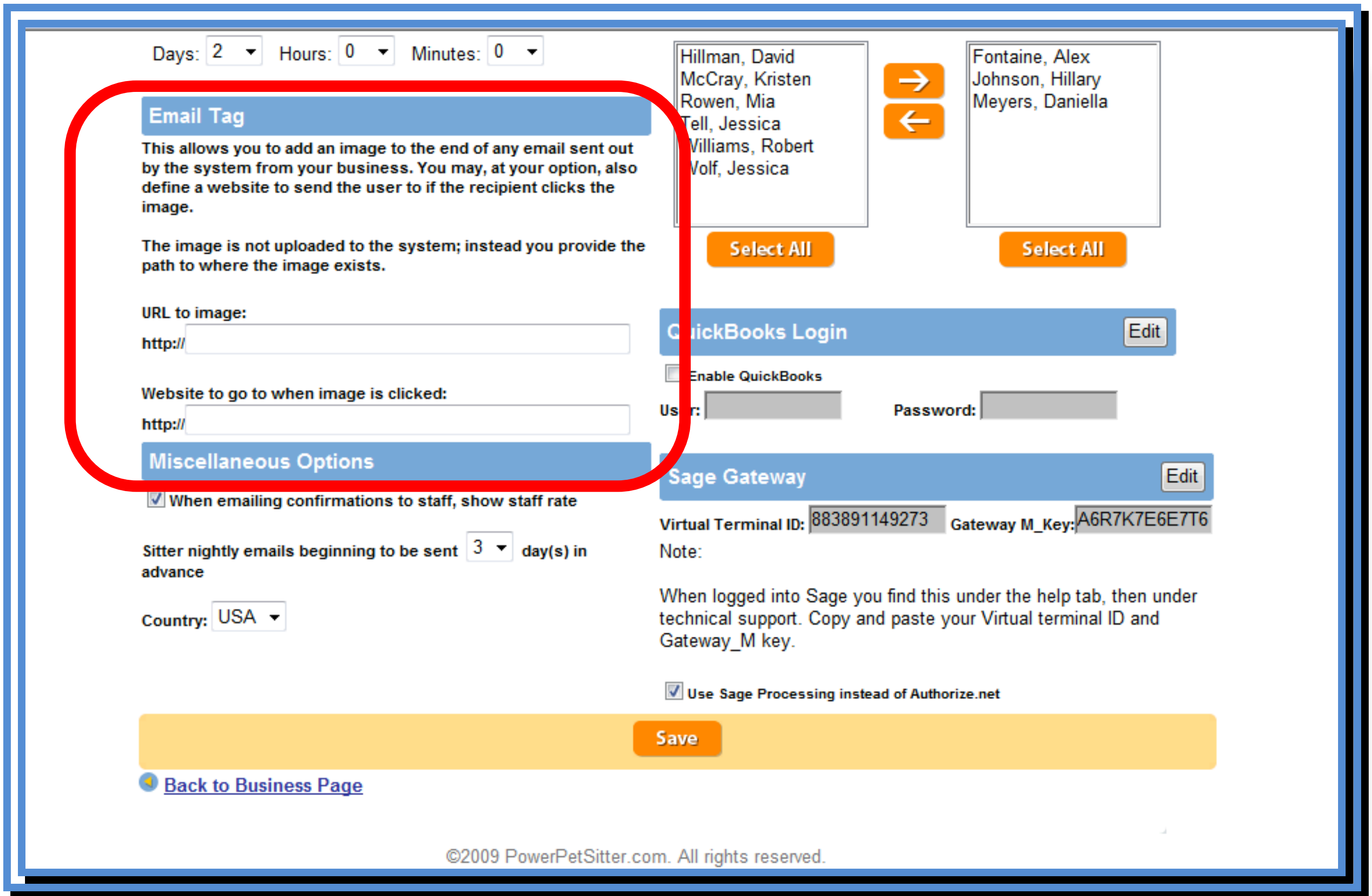


If you decide to only accept credit cards, the client will be required to have a credit card on file in their profile. You will not be able to approve an appointment for a client that does not have a credit card on file if you have chosen to only accept credit card payments. This is not applicable to those clients whom you have moved to the override box.

Scheduling Restrictions – Set a minimum & maximum time in advance you wish to allow your clients to schedule an appointment. You may also set a minimum cancellation period here. A client will not be allowed to schedule or cancel an appointment within these established time frames. Boxes with custom messages for each of these restrictions will appear if a client attempts to book or cancel within these time periods. Custom messages will be established in the **Policies** screen under the **Business** tab.



Email Tag -– The email tag allows you to add a picture to the end of any email sent out by Power Pet Sitter as an agent of your business. You will first enter a URL to the image. The image will NOT be uploaded; instead the URL address is a path which leads to the location of the image. If you choose, you may also set here a website for the email recipient to be directed to if they click on the image at the bottom of the generated email.



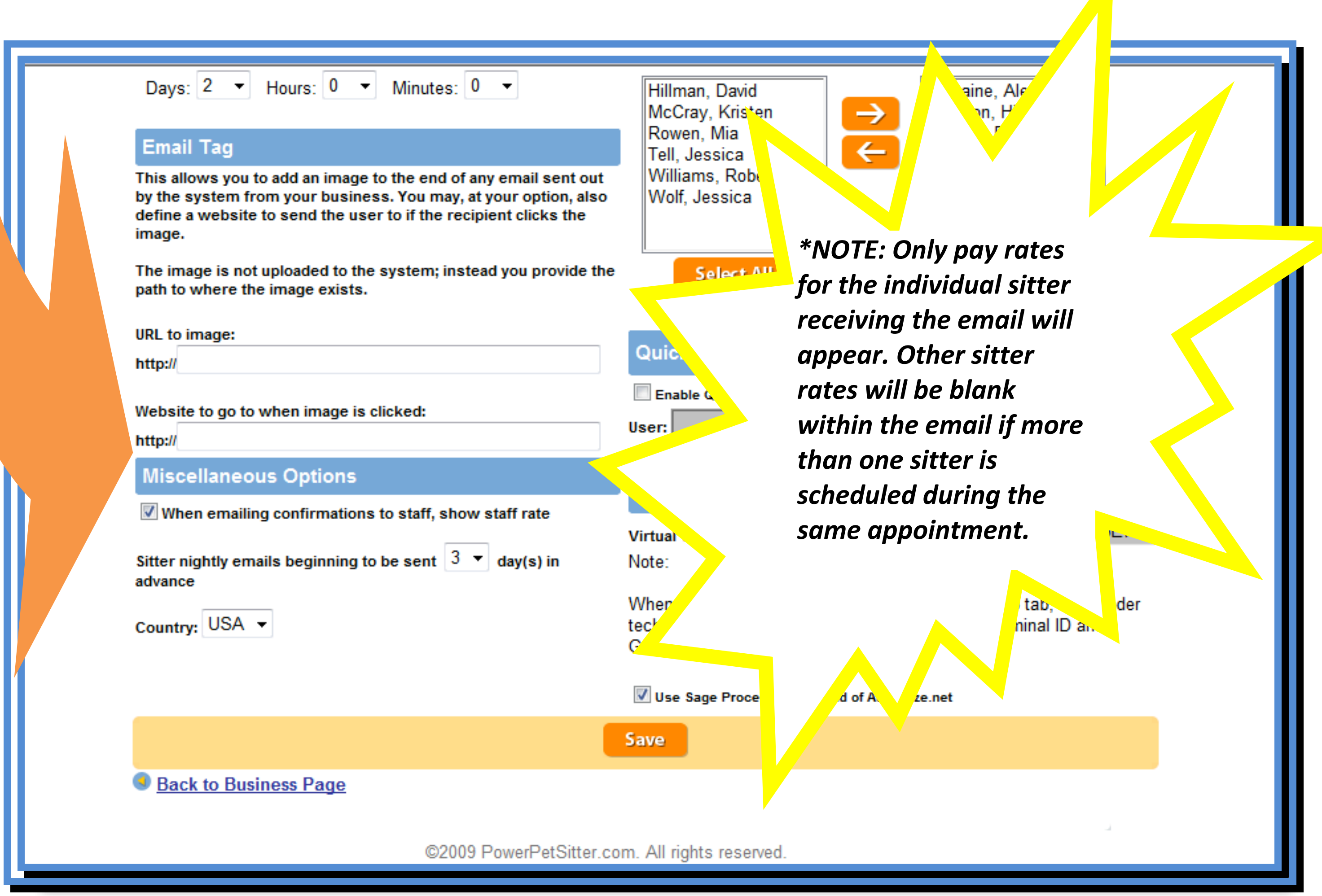
Miscellaneous Options –

1. If you would like for your sitters to see their pay rate within confirmation emails they receive, check this first box indicating such.

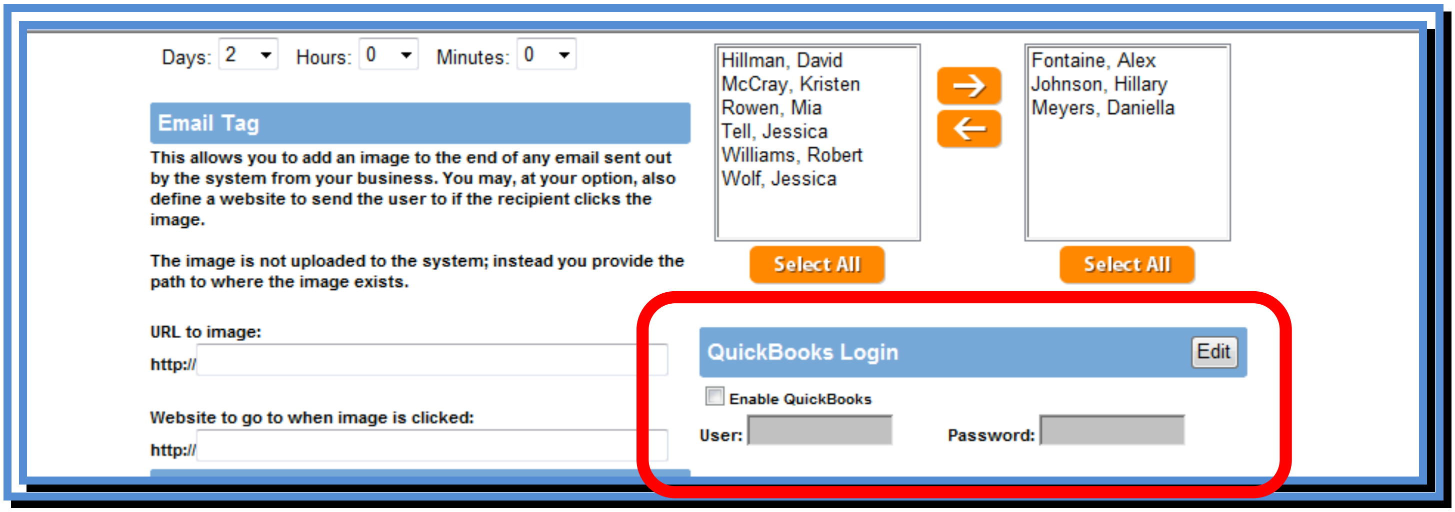
> **NOTE: Only pay rates for the individual sitter receiving the email will appear. Other sitter rates will be blank within the email if more than one sitter is scheduled during the same appointment.*

2. Every night, each active sitter will receive their schedule for the upcoming days via an email generated by the system. You will set here how many upcoming days of their schedule will appear in each email. For example, if you would like for a sitter to receive their schedule for the next 2 days, you will select 2 and each night, the sitters will receive an email with their schedule for the next day and the following day.

3. To complete the miscellaneous options, please select which country you are operating your business from. Appropriate wording, date formatting and the £ sign will be applied in the UK version.

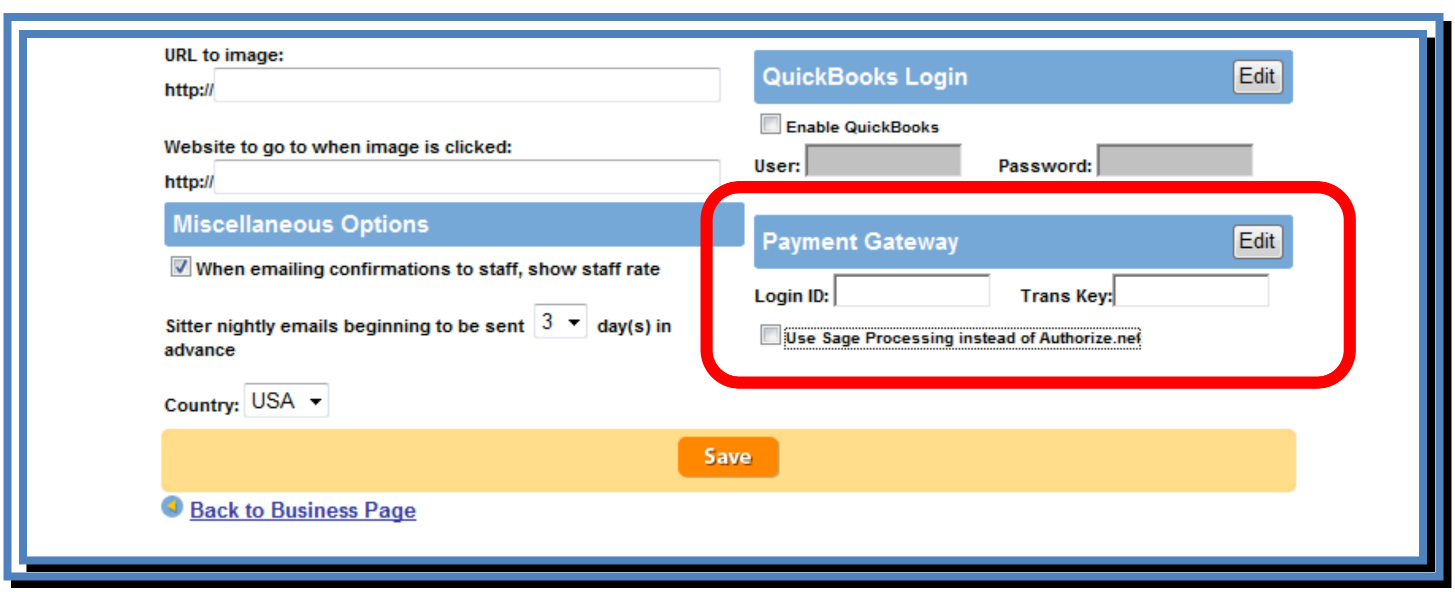


Quickbooks Login – Power Pet Sitter integrates with Quickbooks Online. If you choose to have a Quickbooks Online account and wish to integrate it with Power Pet Sitter, please contact Power Pet Sitter staff to link the programs. For information about Quickbooks Online programs please follow the Quickbooks links found at the bottom of the pricing page for Power Pet Sitter, www.powerpetsitter.com/pricing.aspx .



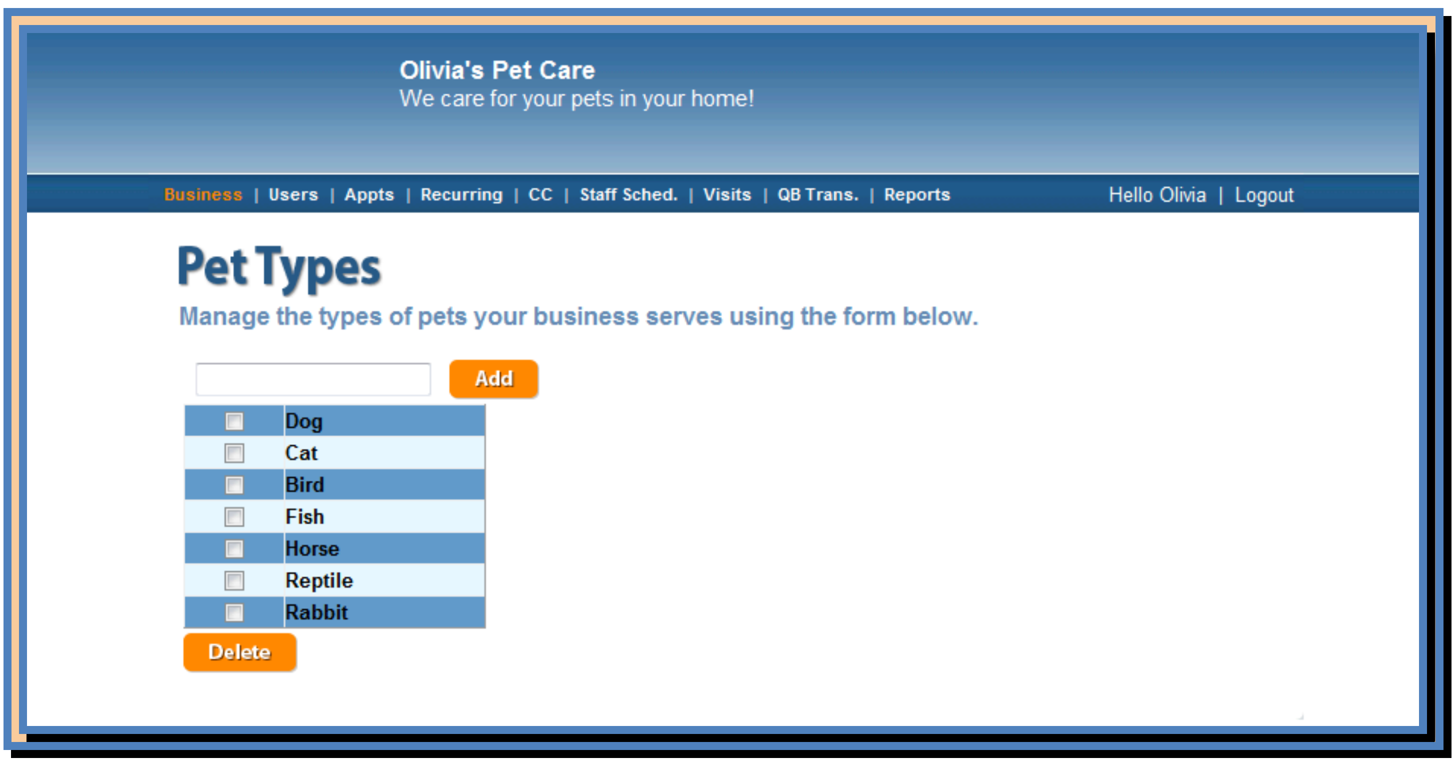
Payment Gateway – Power Pet Sitter can charge credit card payments for client invoices. If you would like to be able to charge credit cards through the Power Pet Sitter program, you will need to apply for a merchant account. The merchant company must use the payment gateway **authorize.net** for this feature to function within Power Pet Sitter. You will enter your ID and Trans Key here to process credit card payments once your merchant account is established.

> **Power Pet Sitter uses and recommends the merchant company e-online data for this process. For more information regarding pricing and fees for e-online data follow this link, www.e-onlinedata.com/powerpetsitter.*



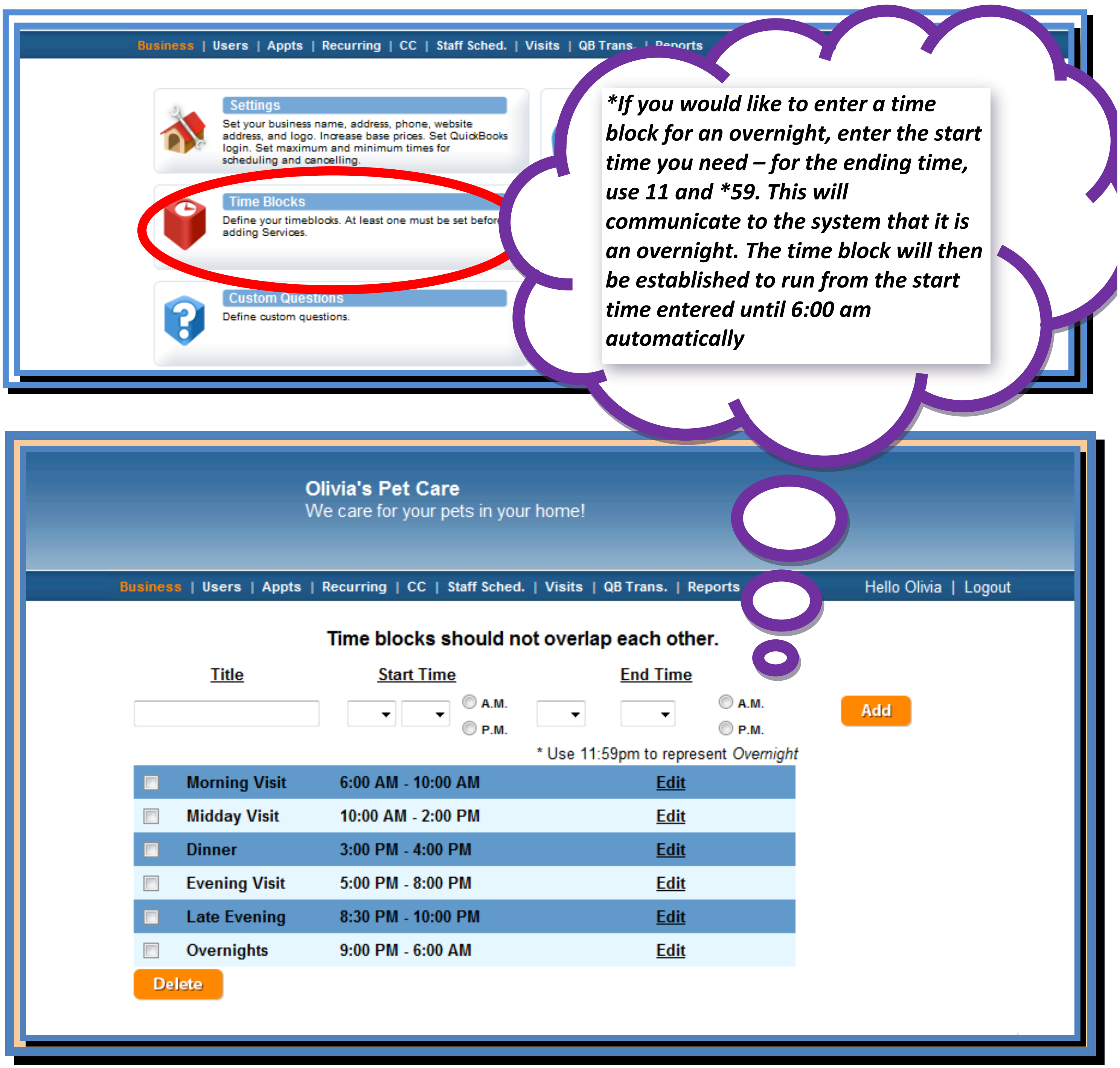
Pet Types – Create a list of the types of pets your business services.

Enter the type of pet and click the "Add" button. The pet types that you generate here will appear in a drop down menu within the pet information area of the pet profile for selection.

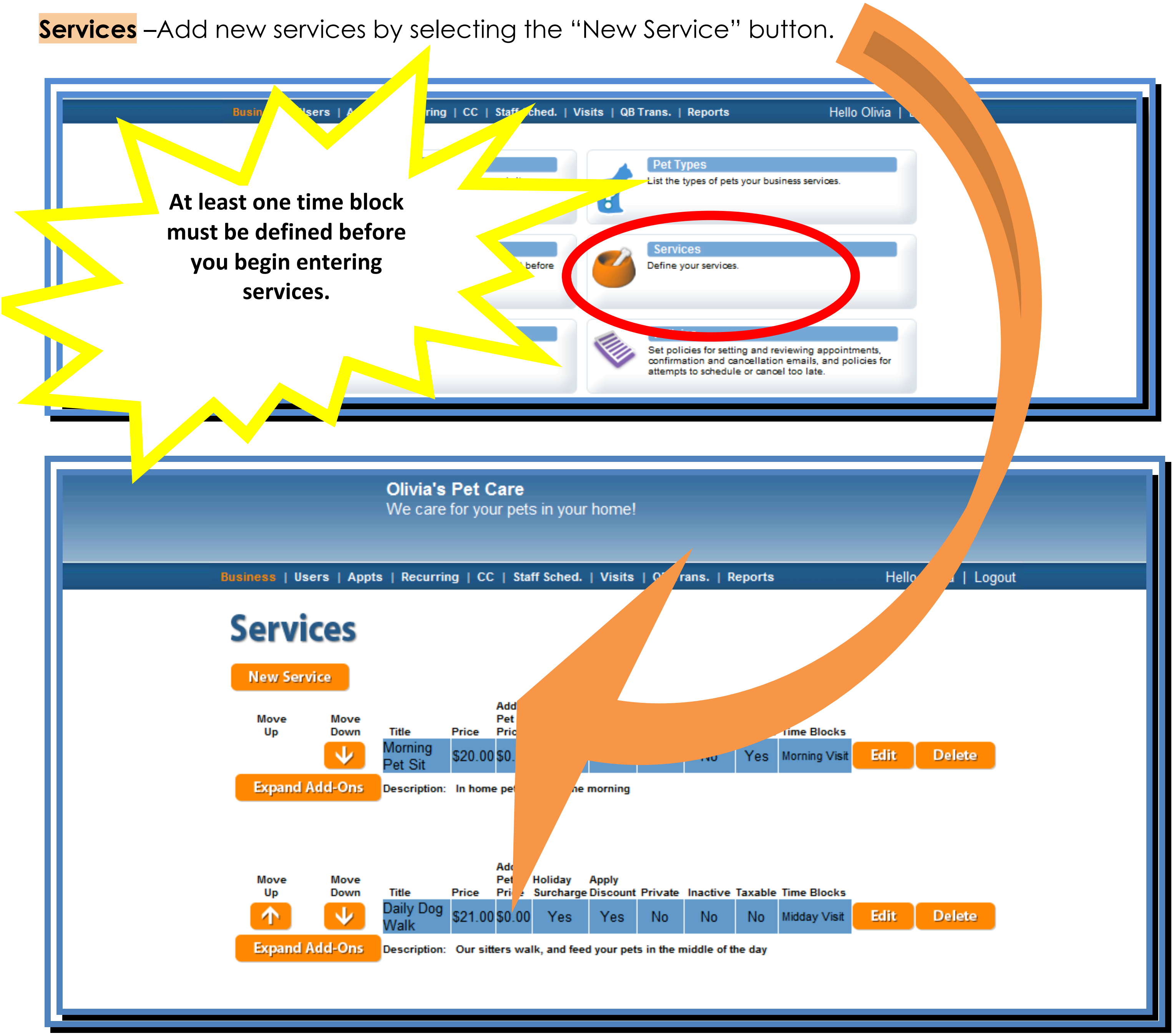


Time Blocks – Define your time blocks in this screen.

Indicate a title for the time block and establish the time frame. Select "Save" to save each new time block you enter. Please note time blocks should not overlap each other. When establishing your services, you will assign time blocks to each service. These time blocks will also appear at the top of the scheduling screen.

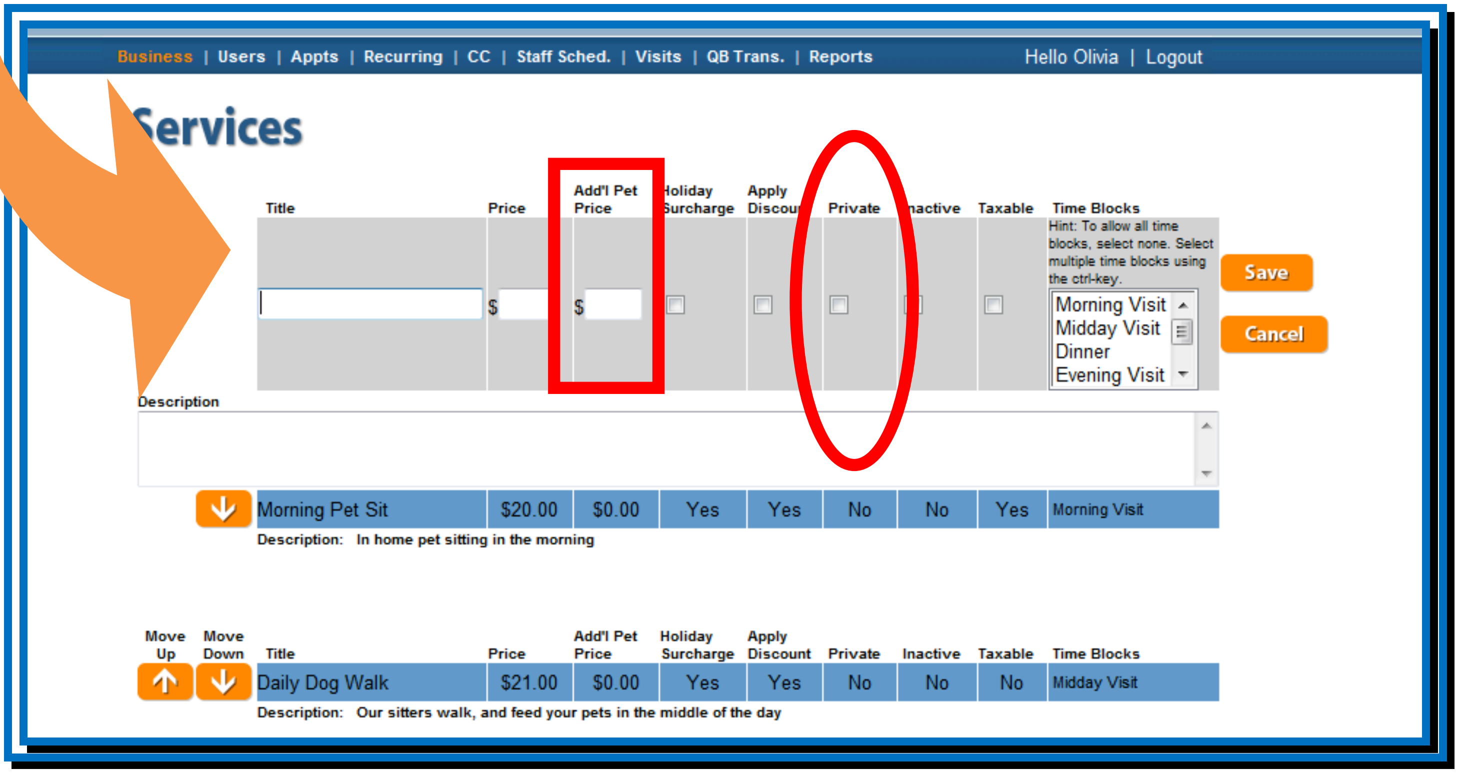


Services –Add new services by selecting the “New Service” button.



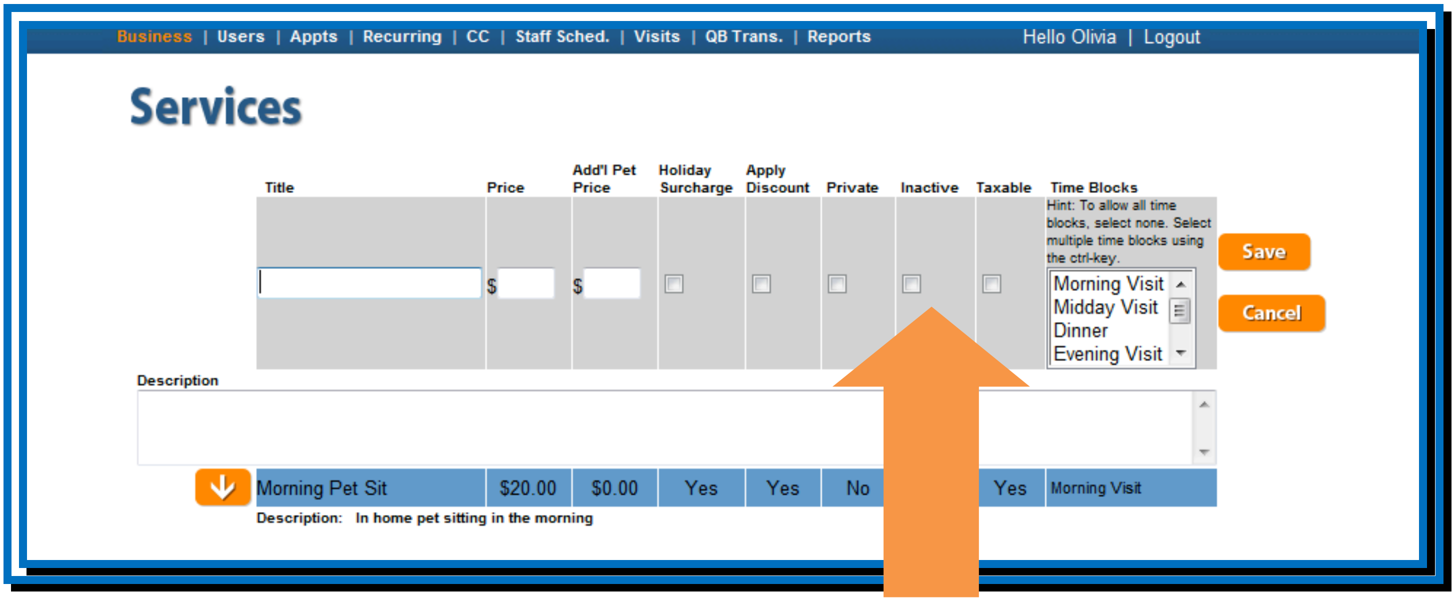
1. Enter a title for your service and assign a system price to the service.

**You may override this service price for individual clients within their profile. You may also perform a price override for an individual appointment within the appointment management screen. Any new or regular clients without a service price override in their profile will be charged this system service price when they schedule this service.*



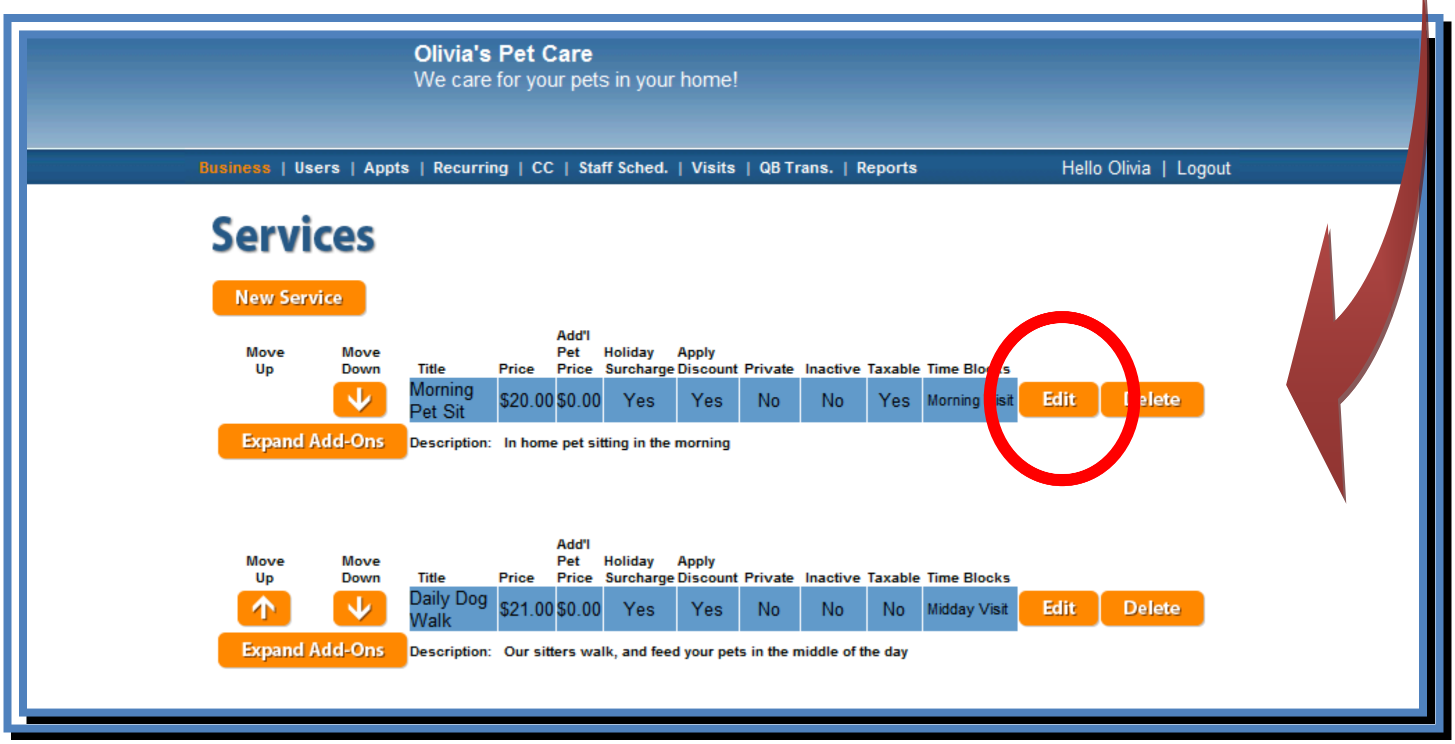
2. Enter a charge for additional pets for the service, if applicable.

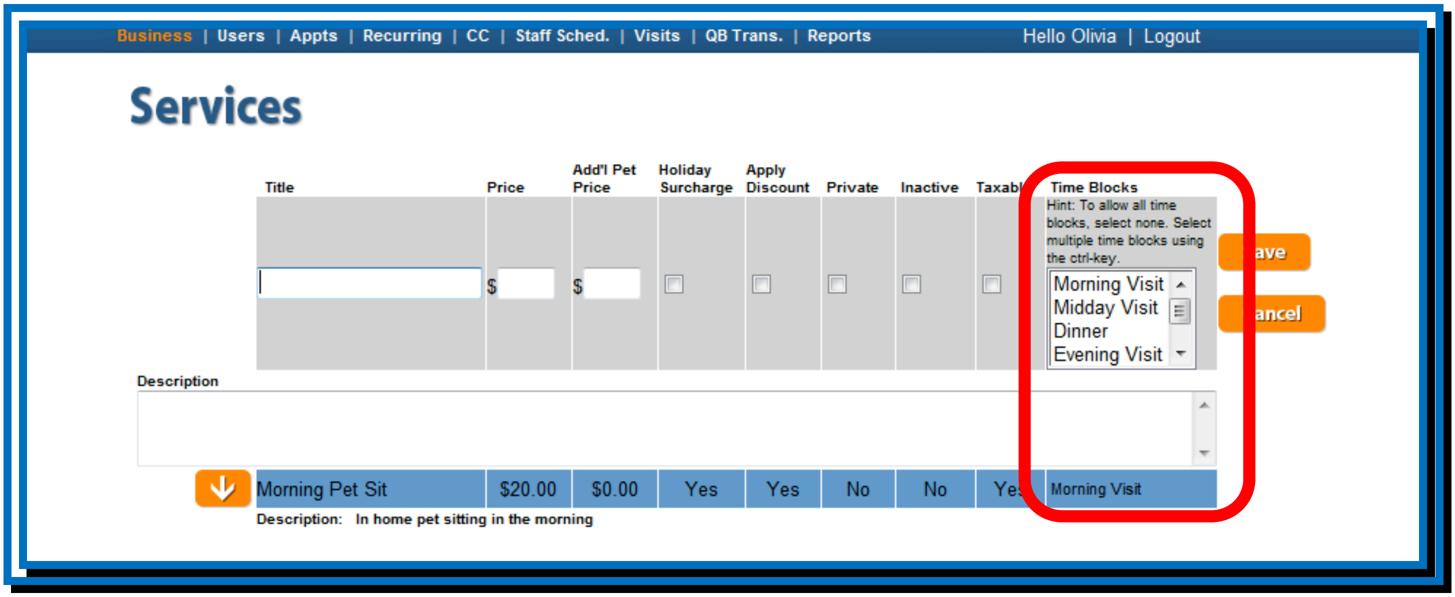
3. Marking a service as "private" will make it such that only administrators will see the service as available to schedule when scheduling an appointment. A private service will not be available to clients when they are logged in and scheduling an appointment for themselves.



4. Make a service inactive to remove it from the scheduling page. You may "EDIT" the service at any time to make it active again.

NOTE* - *once a service has been established, and that service has been scheduled in an appointment - even ONE appointment (even if you are just testing the system and the appointment is cancelled)* *- you will no longer have the option to delete this service.*** *You will be able to inactivate the service to remove it from the scheduling screen, but will not be able to permanently remove the service from the service list here under the Business setup area. An option around this is to "EDIT" an unwanted service. You can make any changes that you like to the service to create a new service reflecting your needs.*

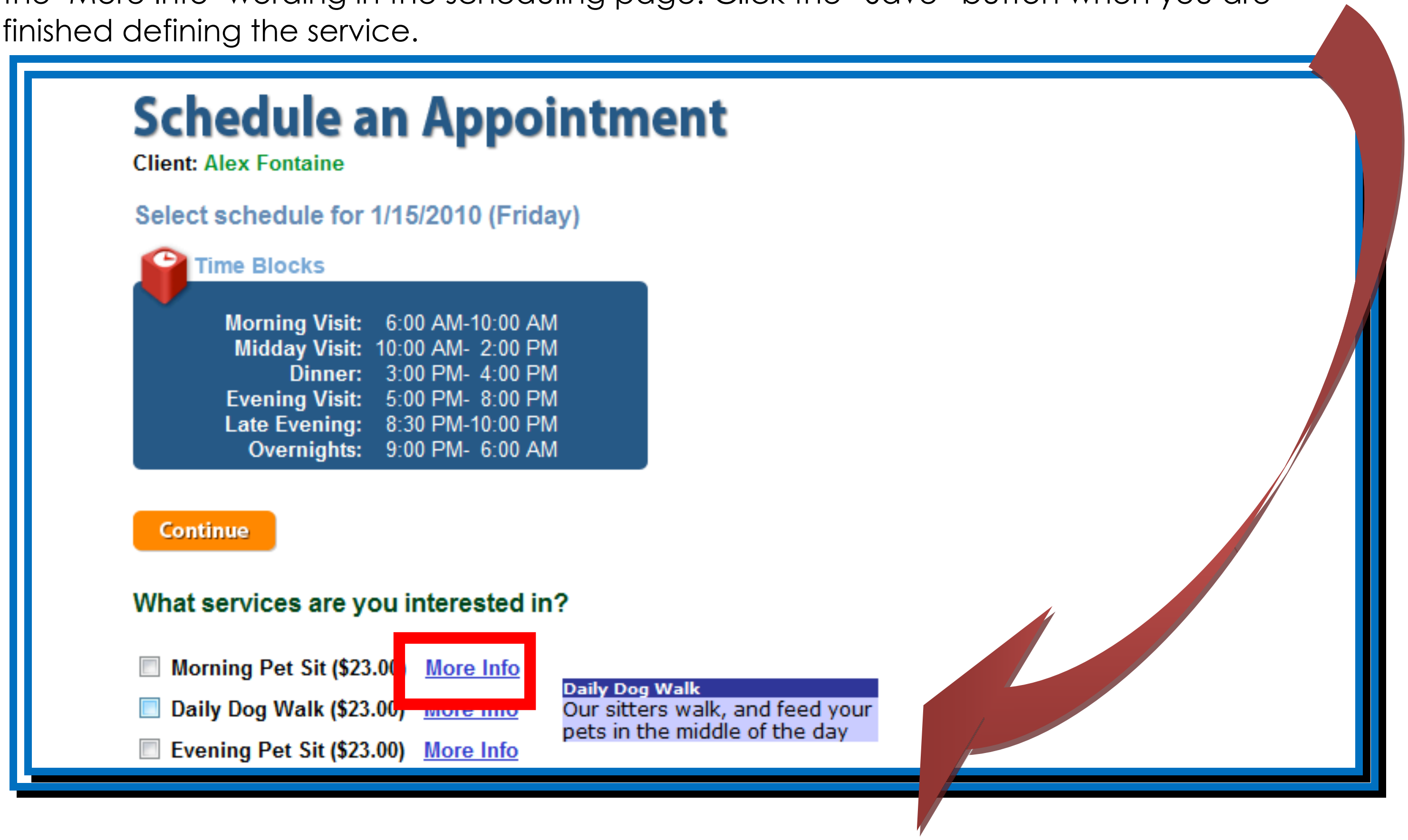




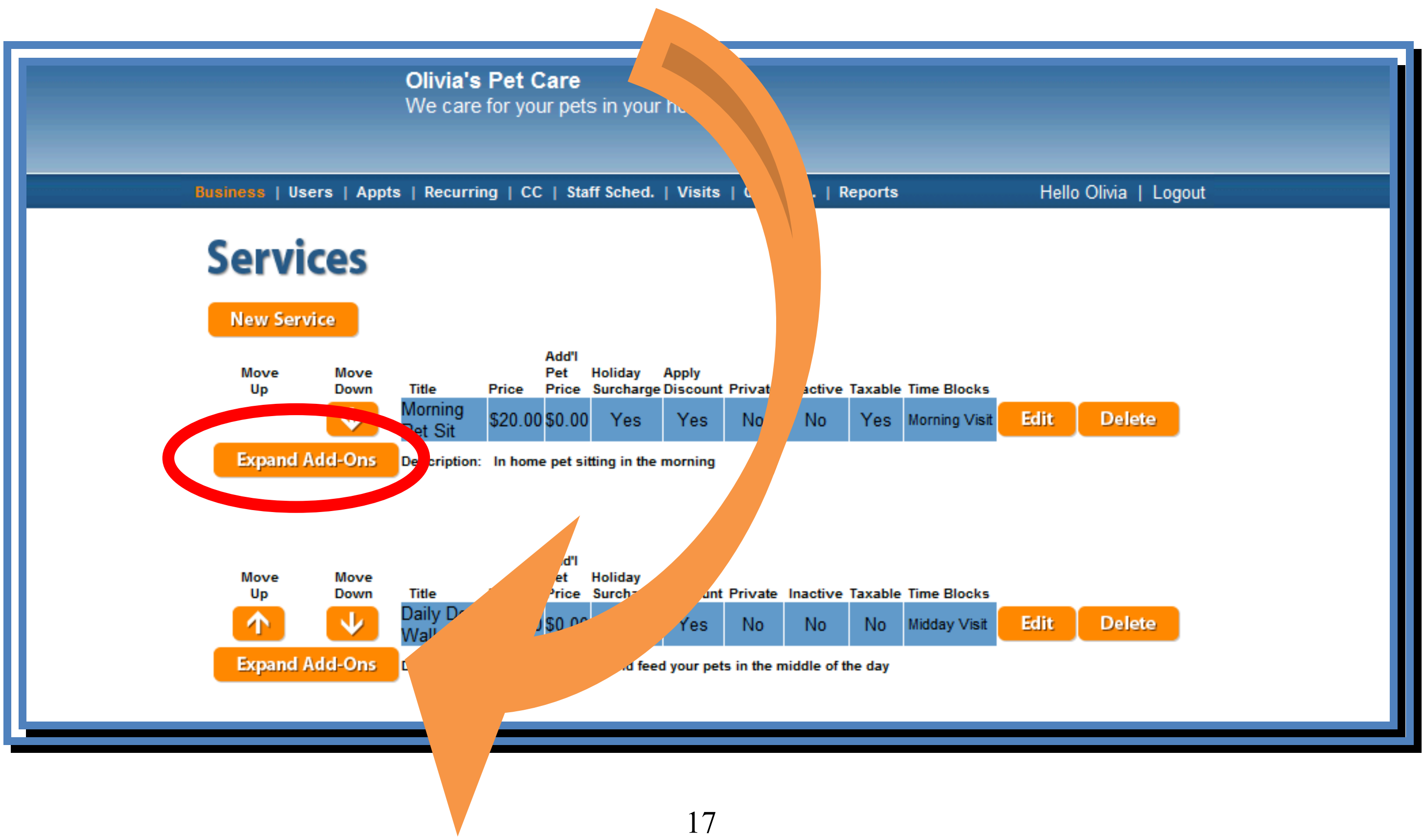
5. Check the taxable box for services that you want to add sales tax to. Set the sales tax amount under the **Business – Settings** screen.

6. Assign time blocks during which you want to offer the service. If you select no time blocks, then all of the time blocks will appear as options for this service. To select 2 or more time blocks, hold "ctrl" key down while making your selections. When this service is selected during the scheduling of an appointment, if more than one time block is assigned to the service, the scheduler will be prompted to indicate which time block they wish the service to be performed within.

7. Add a description of your service. This description will appear when a mouse is held over the "More Info" wording in the scheduling page. Click the "Save" button when you are finished defining the service.

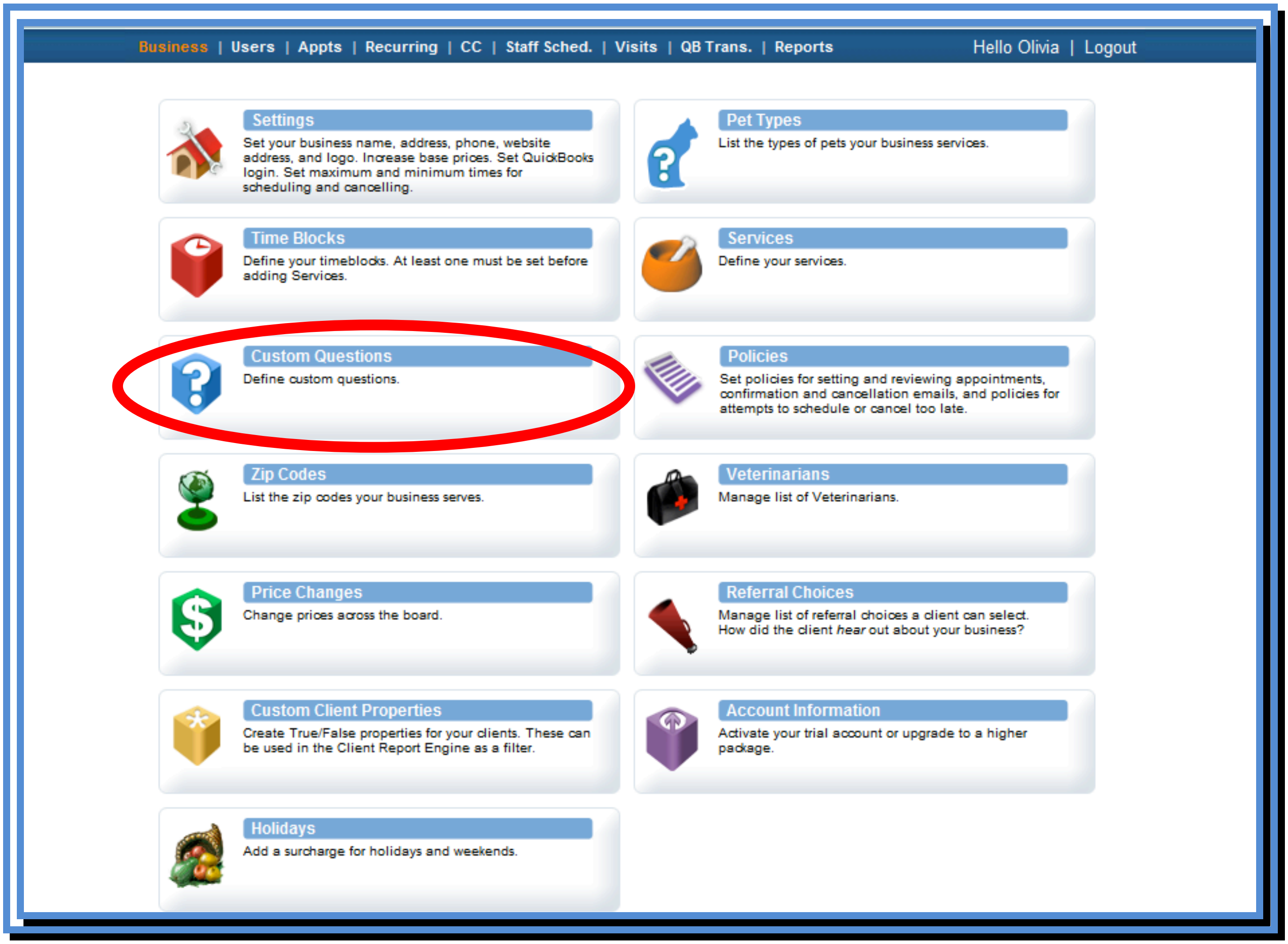


8. Use the "Up" and "Down" orange arrows to the left of the services to place them in an order you wish for them to appear in the scheduling screen.

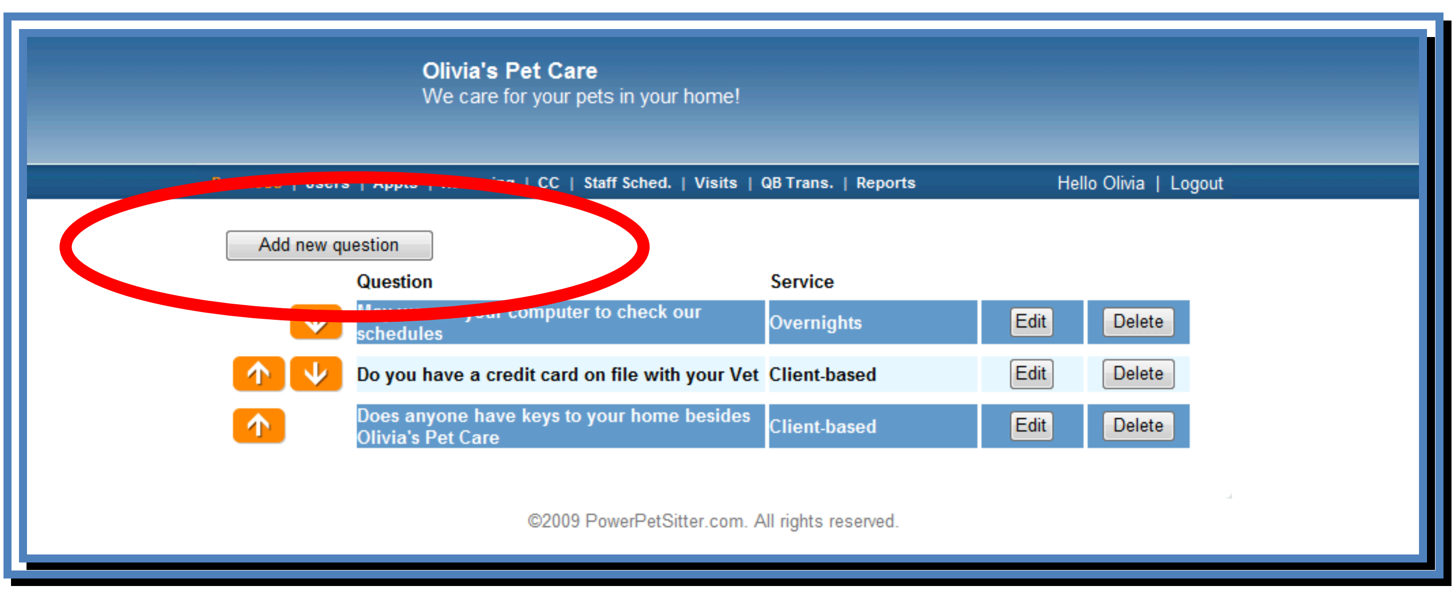


9. You can include an Add-on to a service by clicking the “Expand Add Ons” button below the service to which you want the Add-on to be offered. Name the Add-on service, and assign prices. If you choose Pet Specific, the individual will be prompted to indicate which of their pets will receive the Add-on service. You also have the capability of inactivating an Add-on as well as charging sales tax if applicable. Include a description of the Add-on which will also appear when the mouse is held over "More Info" wording beside the Add-on.

Custom Questions – Define questions that are unique to your business.

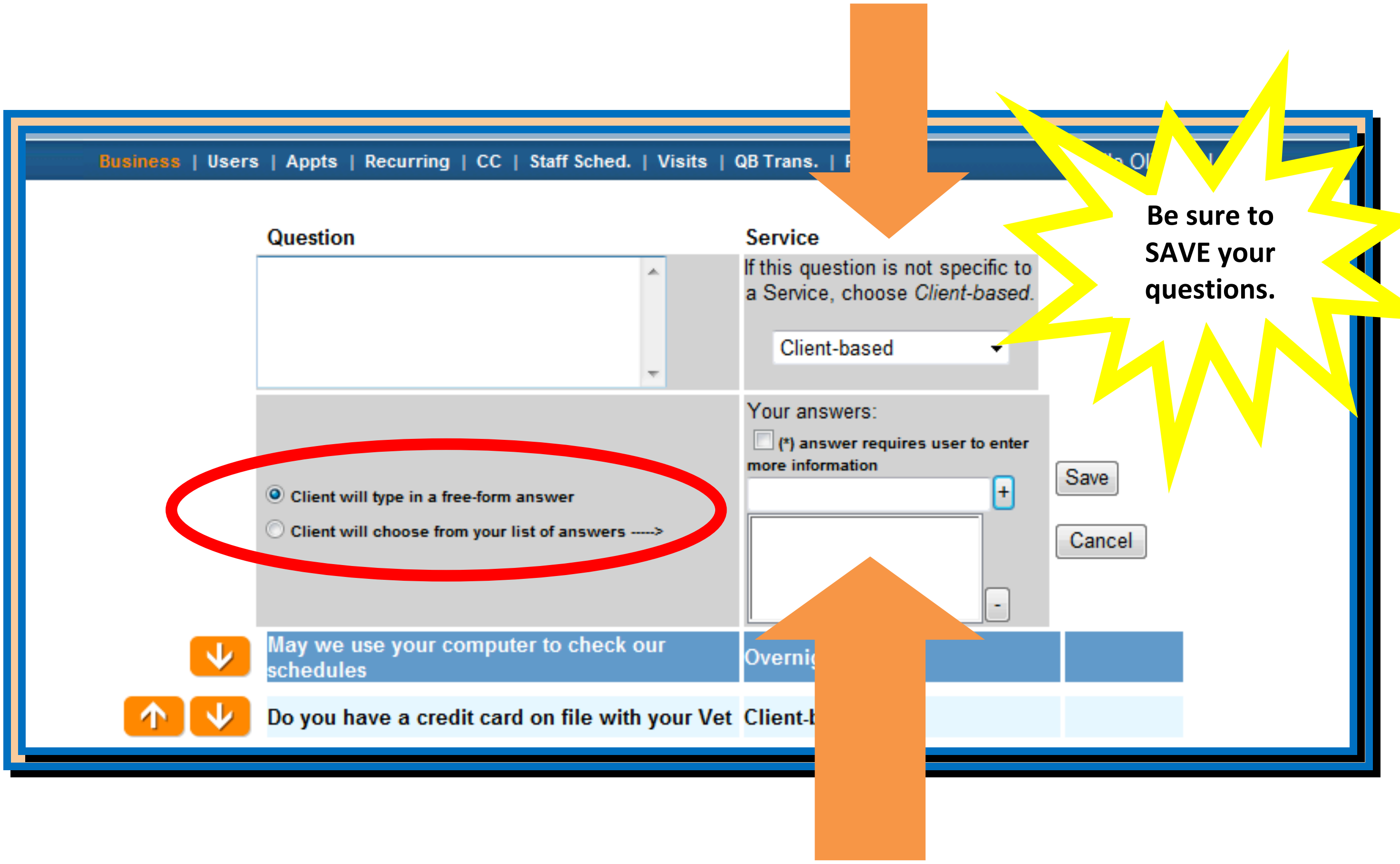


Click the "Add new question" button, and enter your unique question.



To the right of the entered question, choose to make the question client-based or service-based.

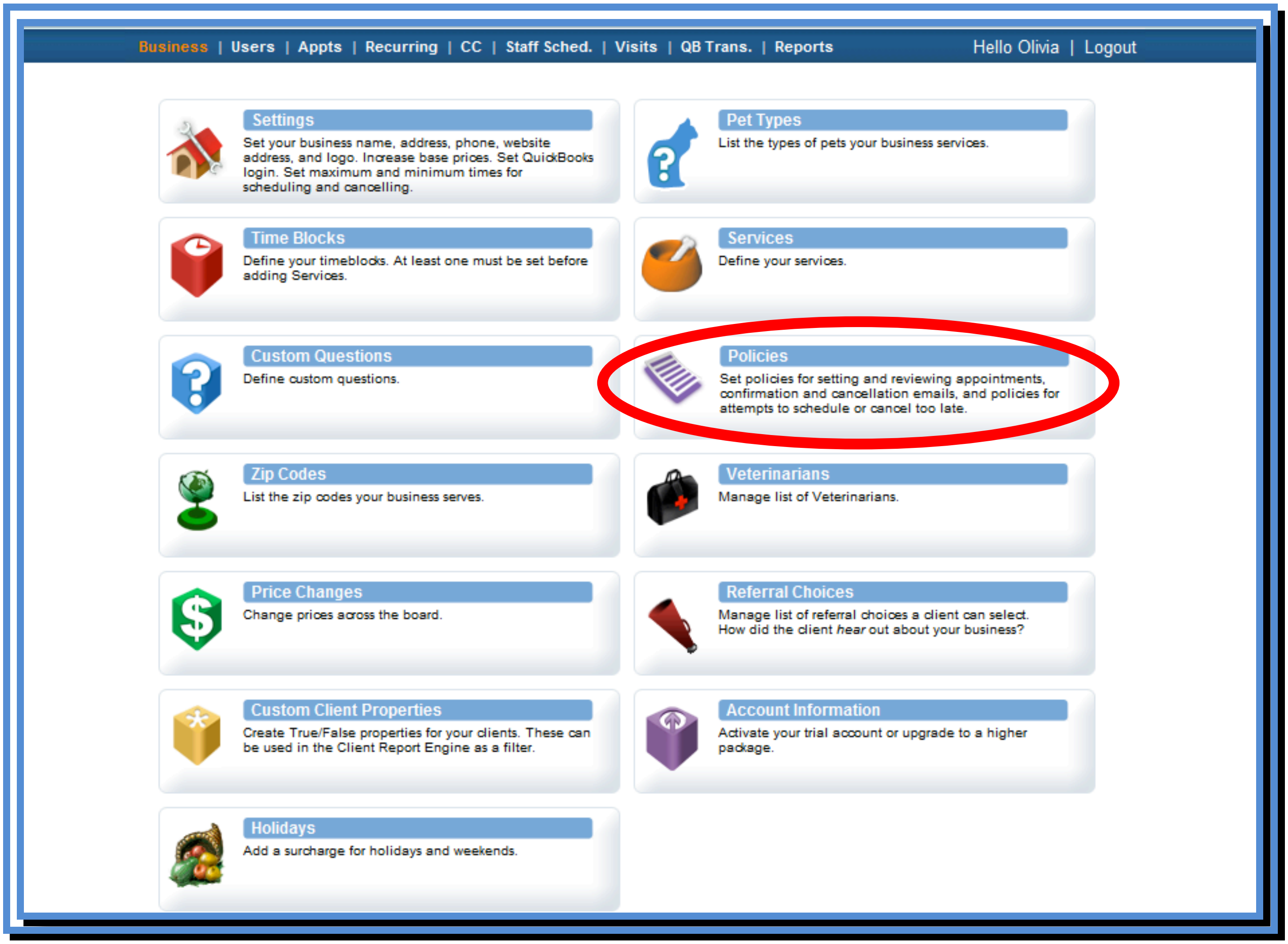
- ✓ Client-based questions will appear in the client's profile and at the bottom of the printed client information page.
- ✓ A service-based question will be a question specific to the service you indicate. Any time the specified service is scheduled, the scheduler will be prompted to answer the question related to the service before completing the scheduling. This service-based question will also appear at the bottom of the printed client information page but only after the client has scheduled the related service.



After inputting the question, decide if you would rather your client input a free-form answer of if you would prefer them to make a selection from a drop down box. If you would like for them to make a selection from a drop down box, develop the list in the "Your answers" area. Type an applicable option, and click the + sign. Your answers will appear in a list. Mark the * box when inputting an option, if you would like your client to be prompted to enter more information in a text box when making this selection from the drop down menu you created.

Use the UP and DOWN orange arrows to the left of the questions to place them in the order you wish for them to appear during their application.

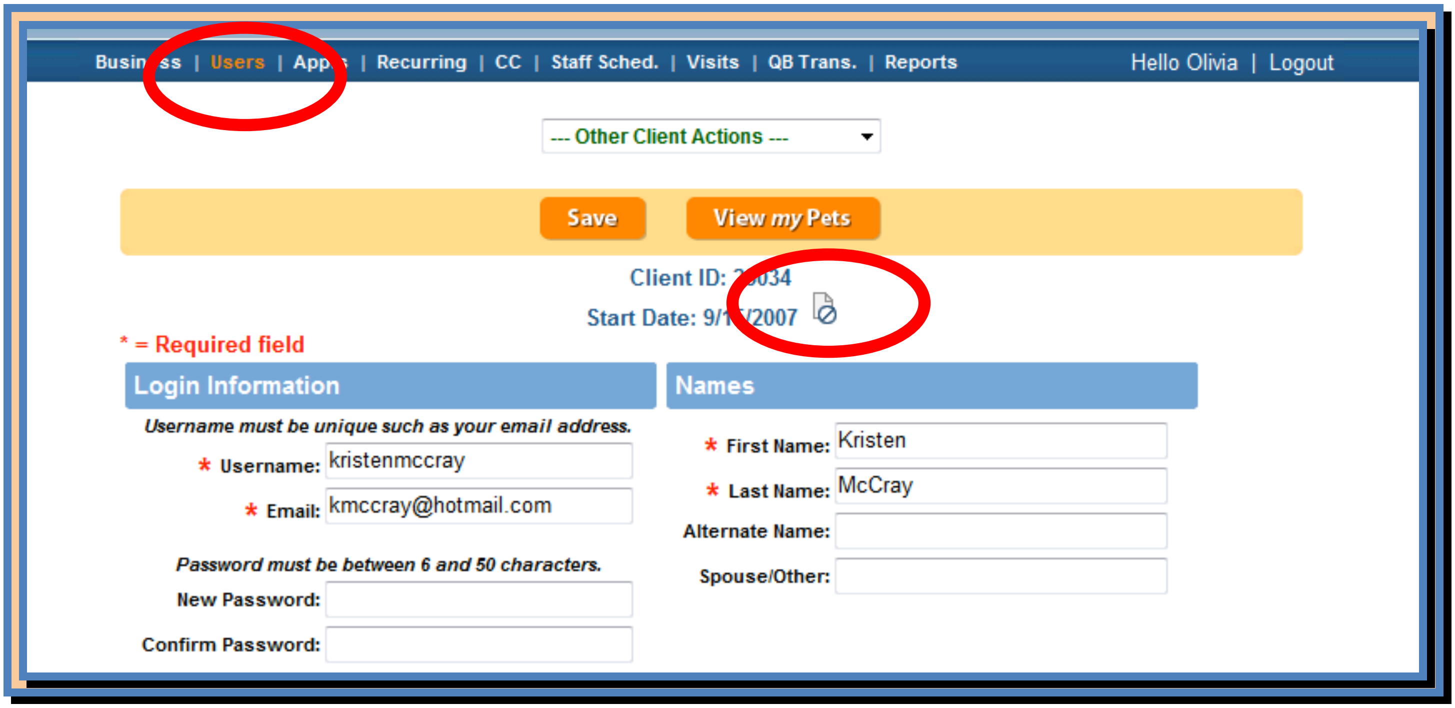
Policies – Manage your business policies.

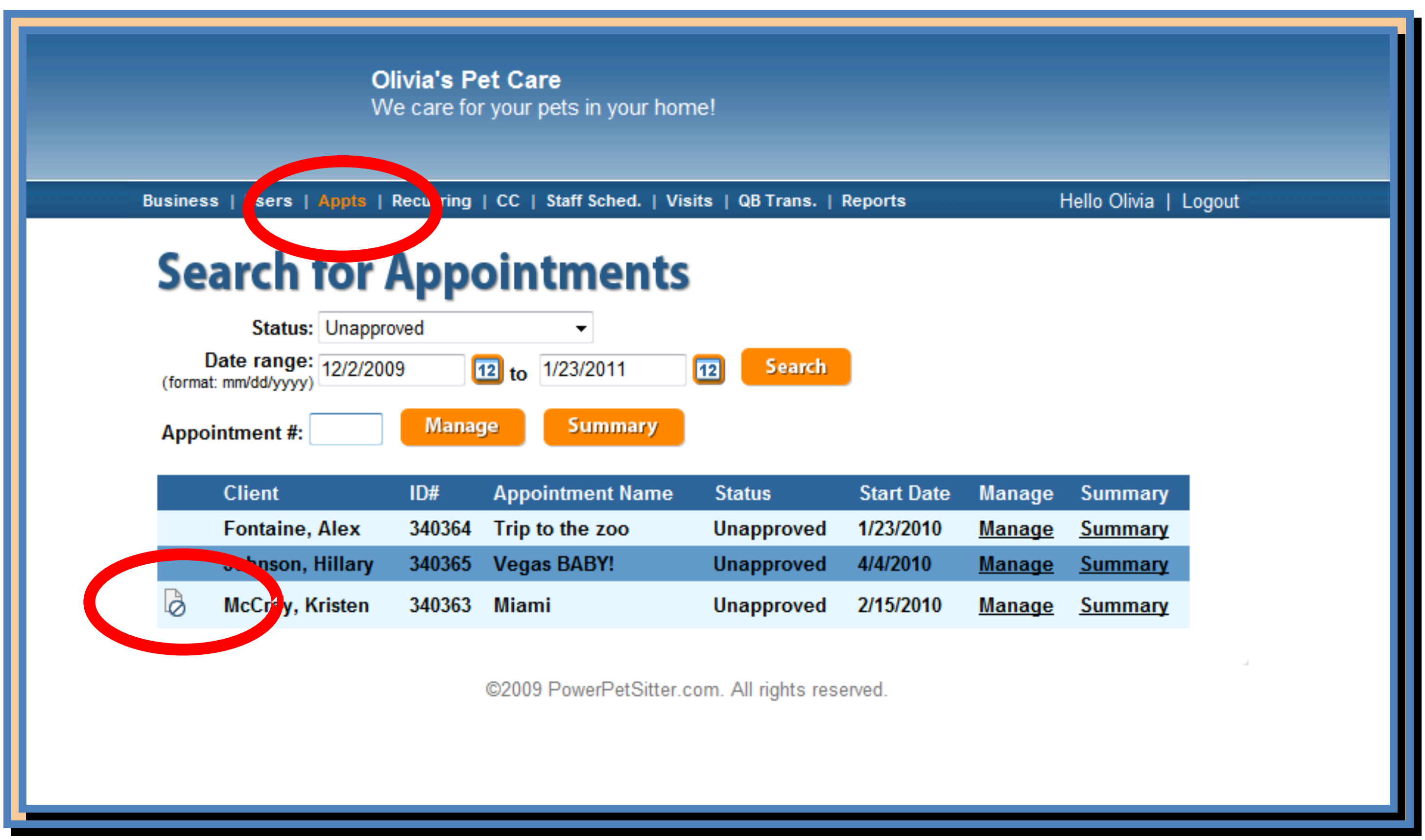


A list of areas where a policy will appear is shown on the left side of the screen. Select one of these areas, and enter the policy in the box to the right. The exact place where this policy will appear will be described above the box. Be sure to click the “Save” button after entering each policy.

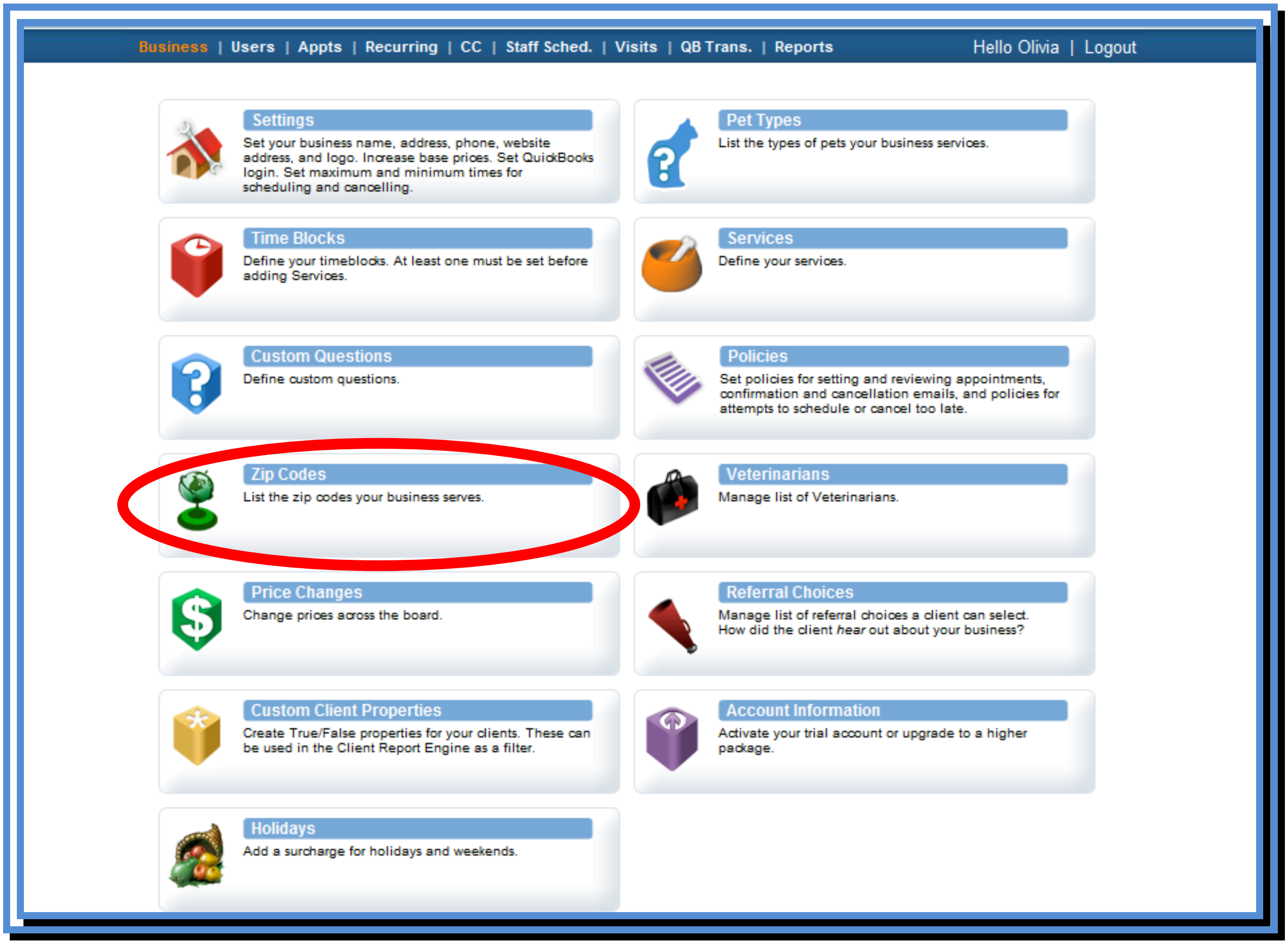
The final option of the policy list is where you will input the policy agreement for your business. Each new client registering for the first time will be required to read the policy agreement and check a box indicating that they agree to the policy before they can complete the registration process. The policy agreement will appear at the bottom of every client profile when the customer is logged. There will be a link, "Click here to read our Policy Agreement", for clients to review your agreement at any time. Once this link has been activated, a text box containing the policy will appear. Above the box will be a link for the customer to print the agreement if they desire.

For those current clients who have not read the policy, a document icon will appear at the top of the client profile and beside a scheduled appointment in the **Appointment Tab** indicating to you that they have not read the policy. Once the client logs in, activates the policy link, and reads the policy, the icon will disappear letting you know they have read the agreement.





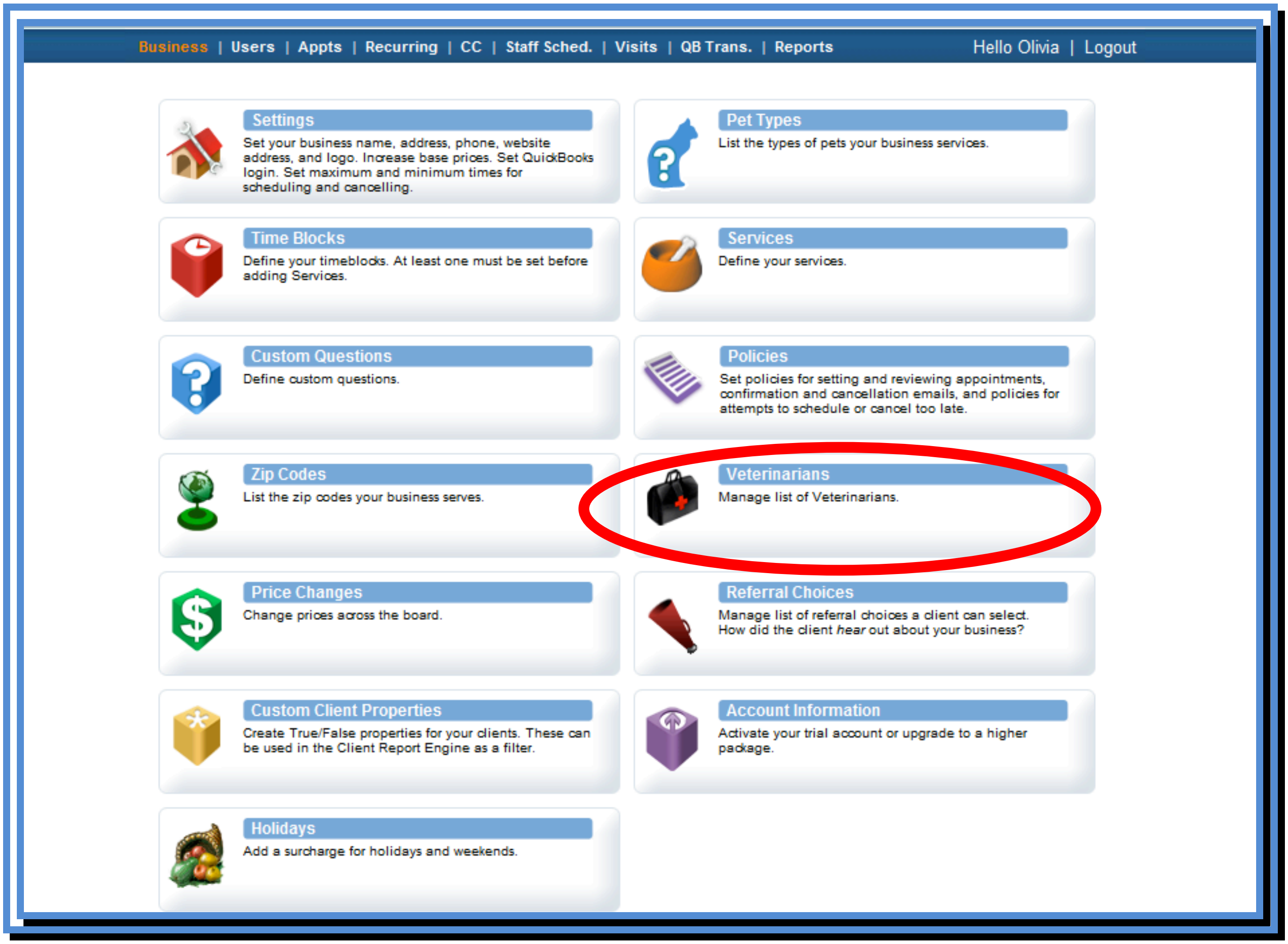
Zip Codes – Enter a list of zip codes that your business services.



You may enter zip codes individually here, or search for zip codes by city and state and choose from the generated list of zip codes related to the city you searched. Individuals registering themselves will first be prompted to input a zip code. If they input a zip code that is not indicated in this list, they will receive a message that your business is not currently servicing their area, so be sure to include them all!

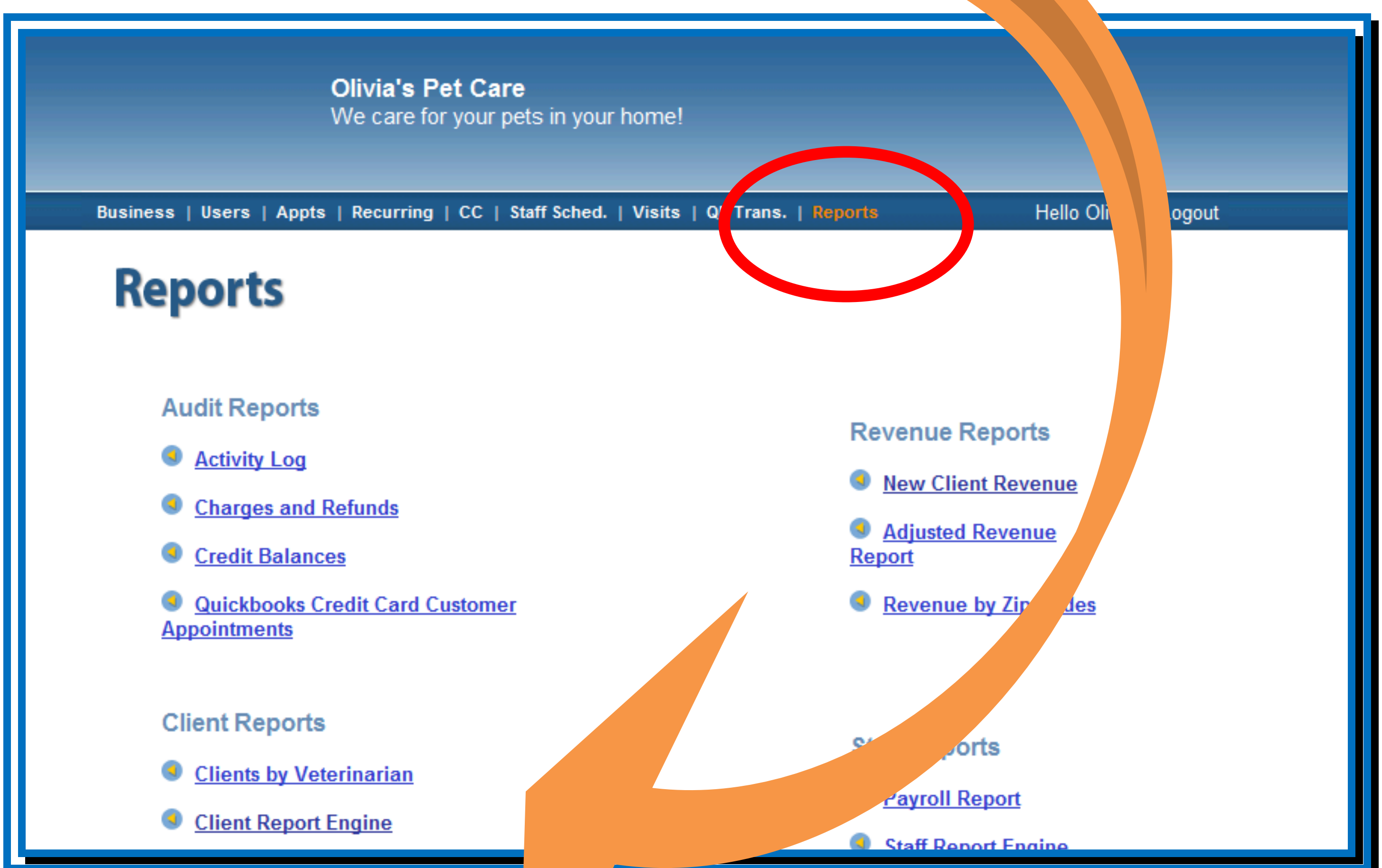
Your staff will have the ability within their staff profile to select from this list of generated zip codes. Staff will choose zip codes that they are willing or available to perform a visit within. When a client books an appointment, a list of available sitters who have selected the client's zip code as one within which they are willing to service, will appear for the administrator to assign a sitter.

Veterinarians – Generate a list of veterinarians within your area.

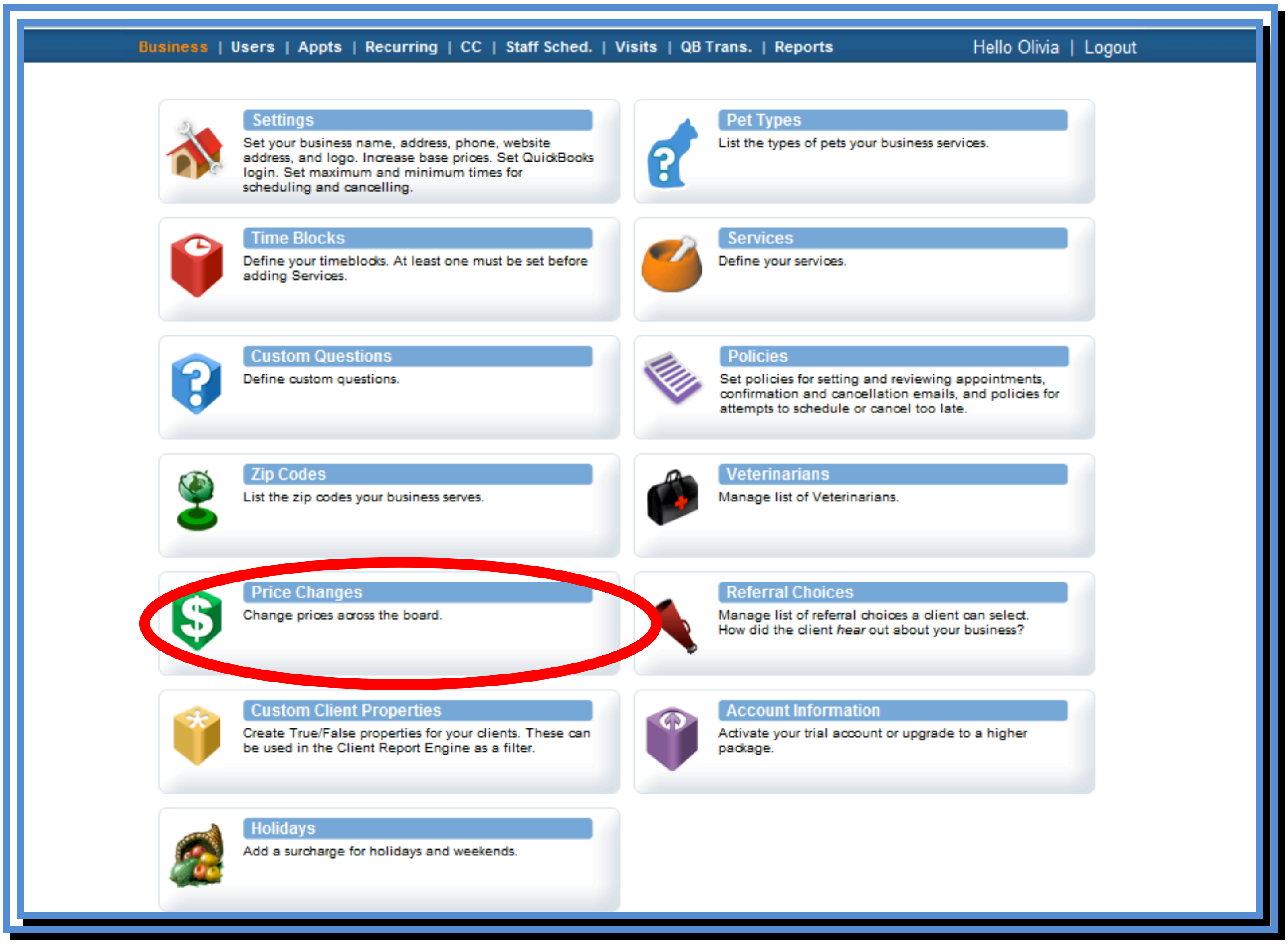


You may enter the veterinarians yourself, or this list will automatically populate anytime a client enters information for a new vet for their pet. The veterinarians in this list will appear in a drop down menu for selection within a client's pet information area of the client profile.

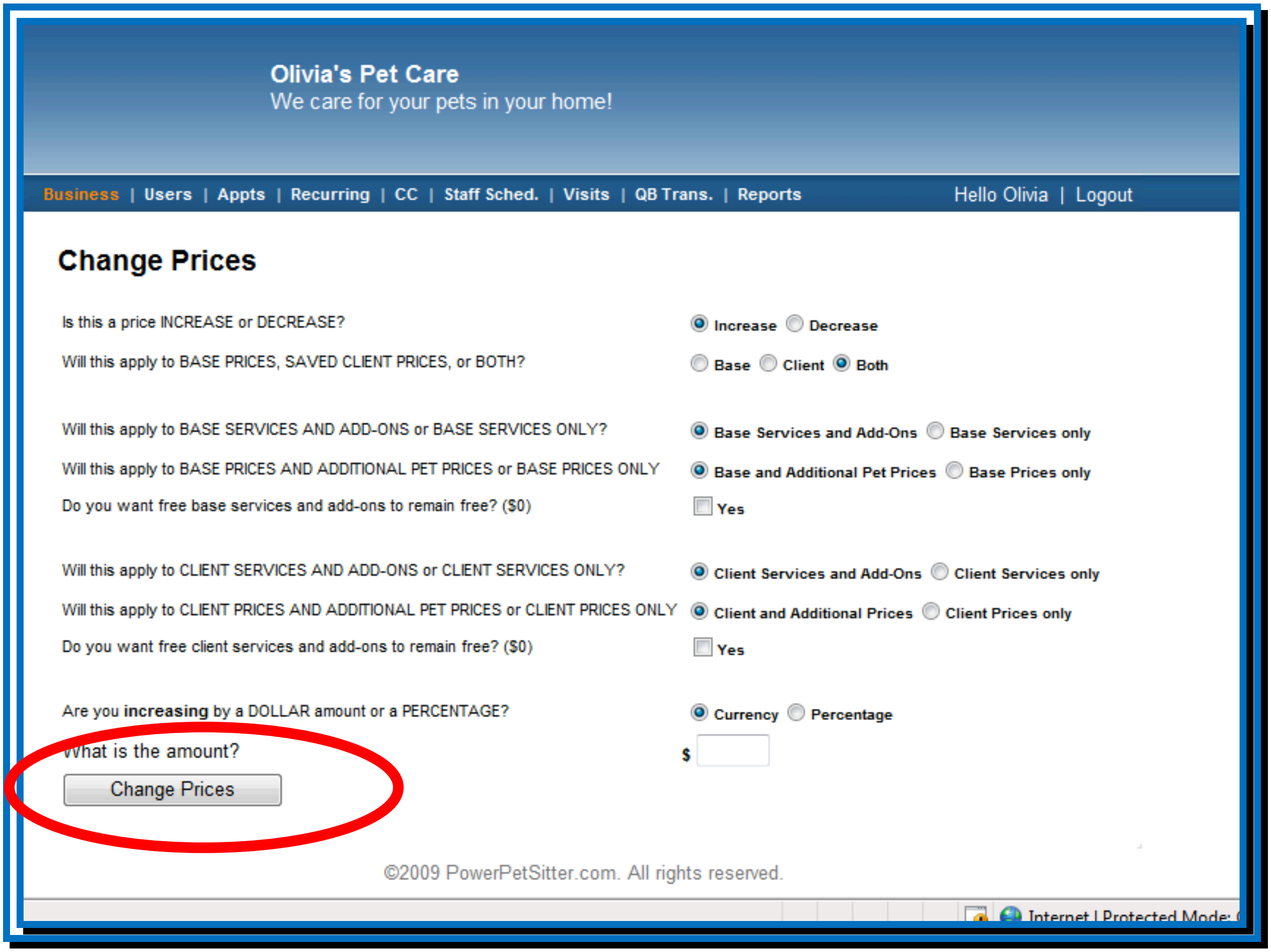
You may also run a report of clients by veterinarian under the **Re** ab.



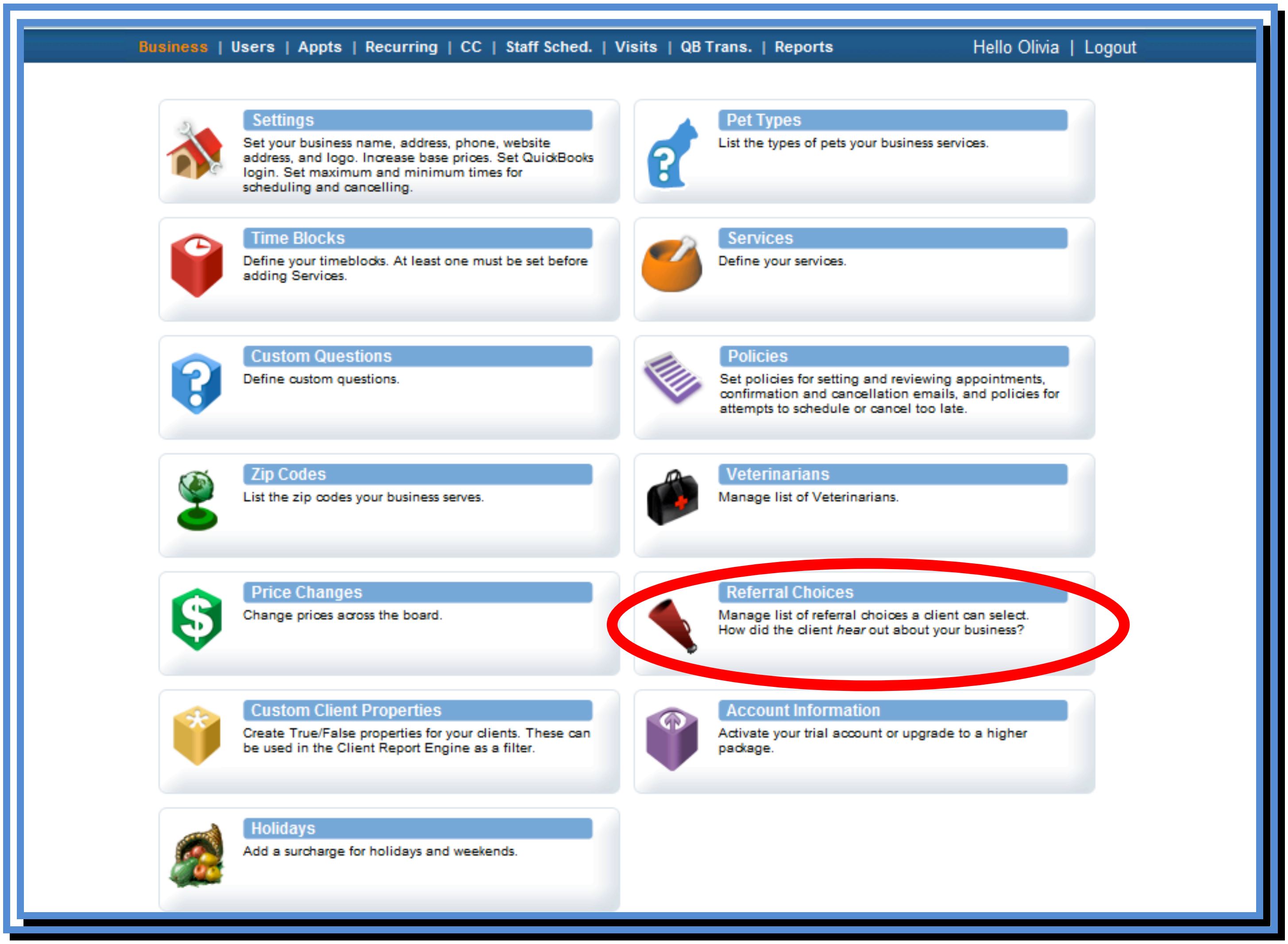
Price Changes – Make a price change (increase or decrease) across the board with this screen.



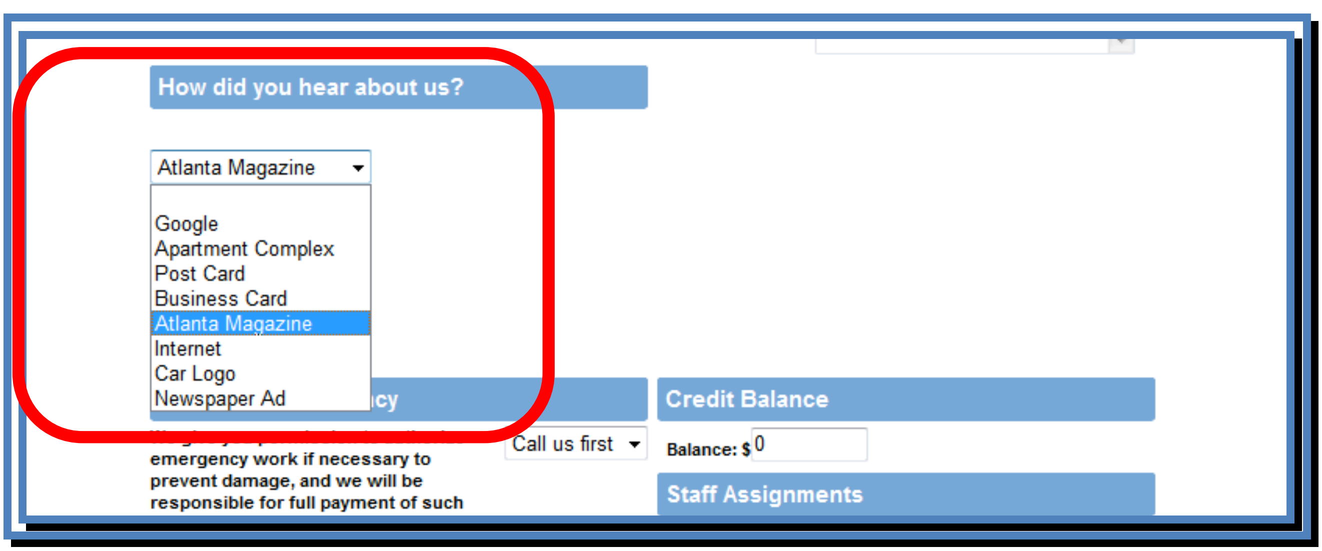
Simply answer the questions and click the “Change Prices” button.



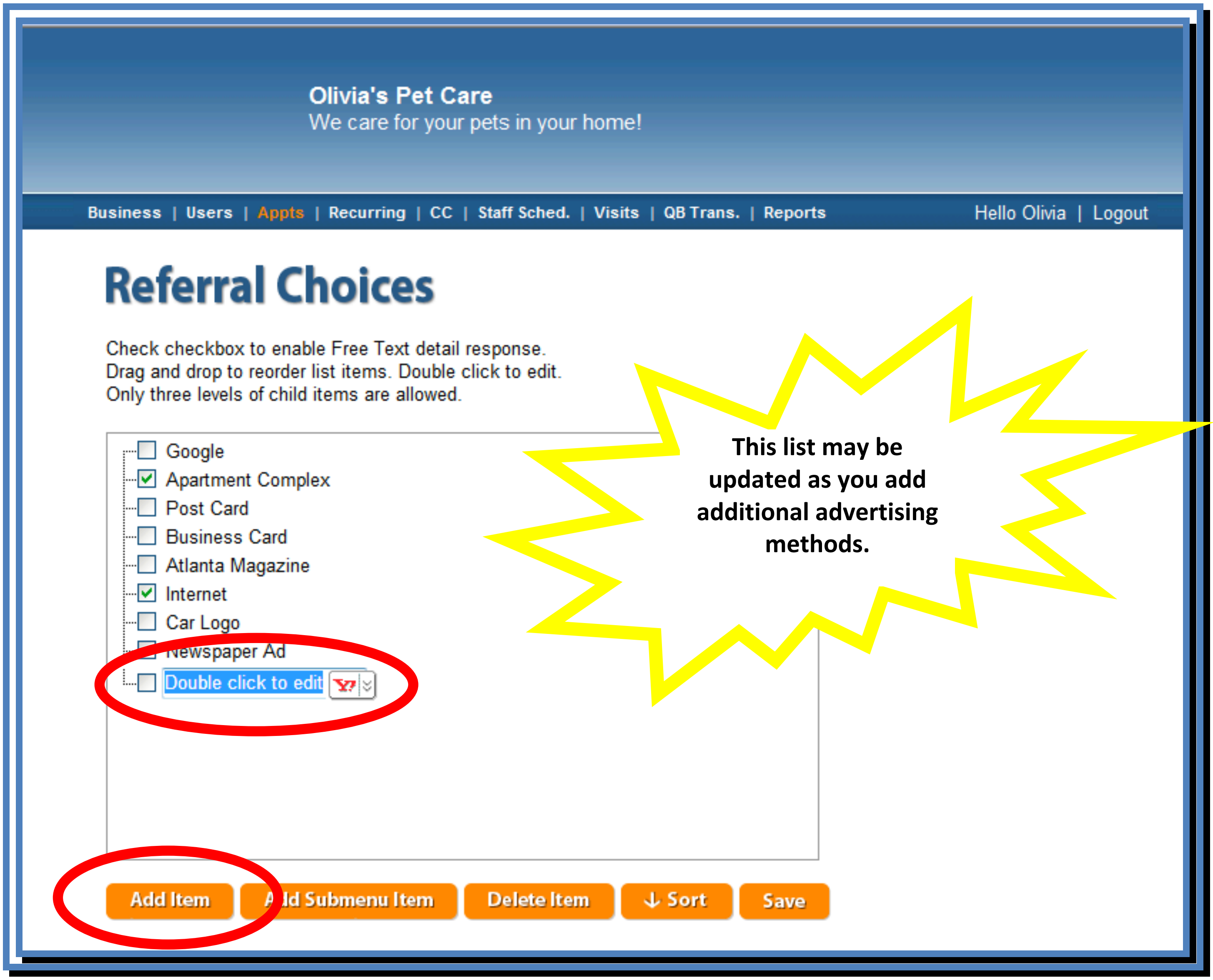
Referral Choices – Generate a list of ways that your client has learned about your business.



This list will appear within each client's profile in a drop down menu.

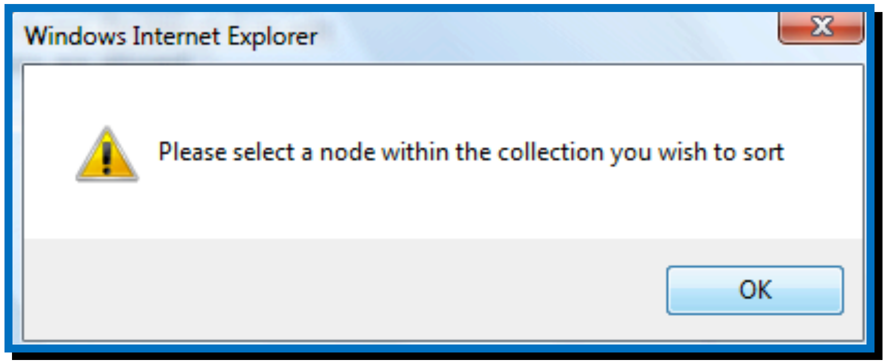


To generate this list, click the "Add Item" button. A new choice will appear as "Double click to edit".



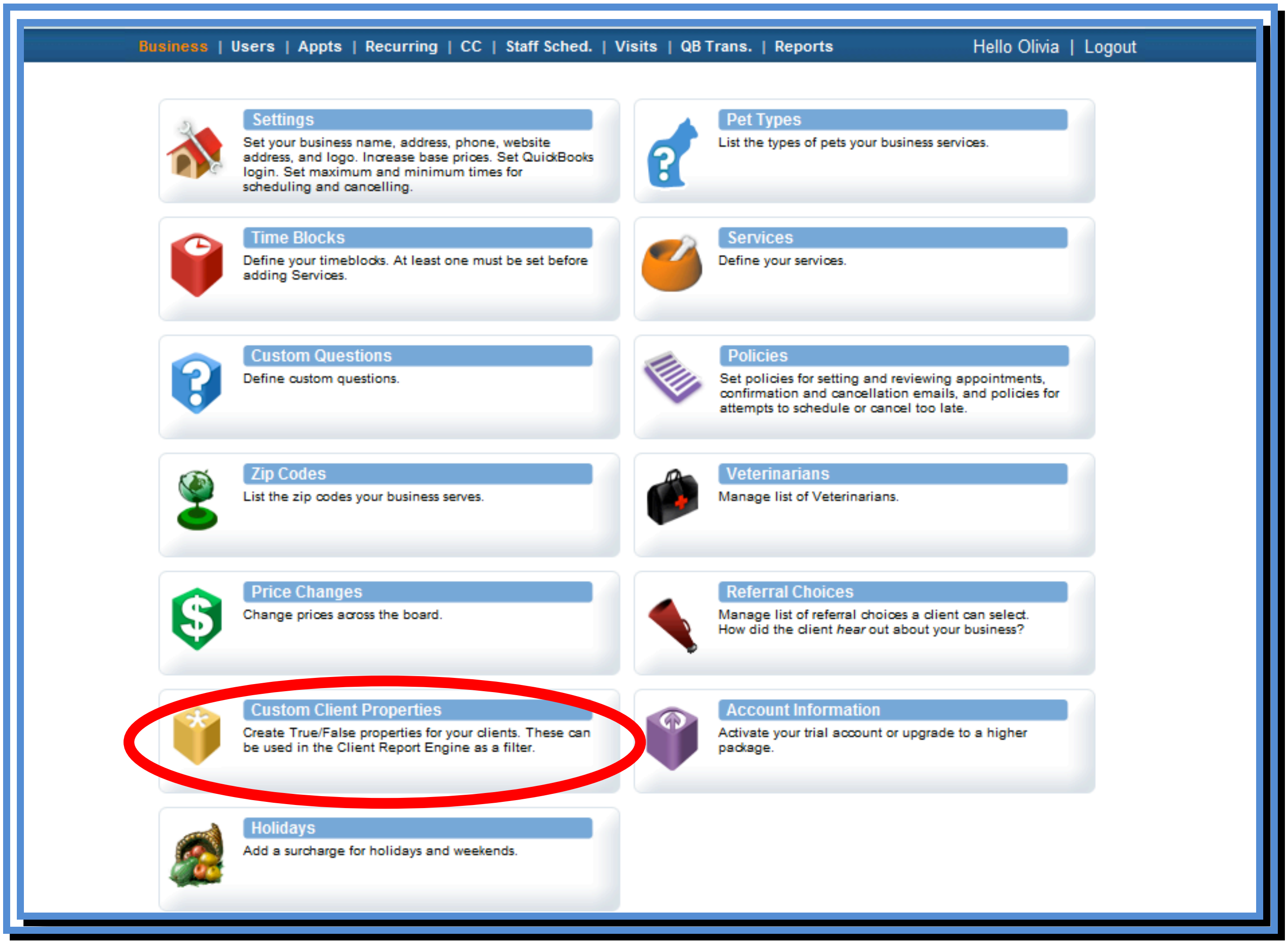
Select the checkbox in front of the referral choice if you would like for more specific information regarding this referral option to be entered. For example, if you have "Veterinarian" as a choice, you may want to know the name of the veterinarian.

To alphabetize the list of Referral Choices, select one of the choices and click "Sort". If you do not select one of the choices, you will receive an error message:

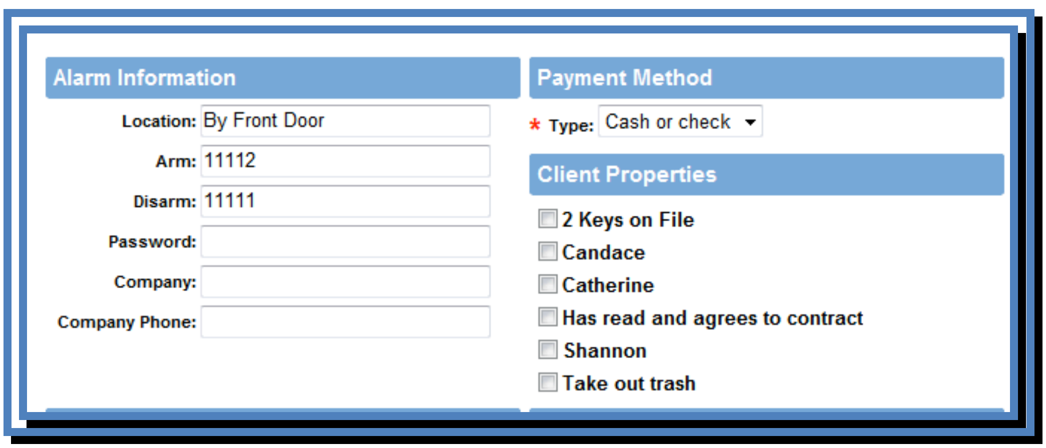


Within the **Reports** tab you will be able to generate a list of clients using these referrals as a filter.

Custom Client Properties – Create a list of true/false statements which will appear within the client profile.



In the client's profile, you will have the option of selecting this property as true with a check mark:

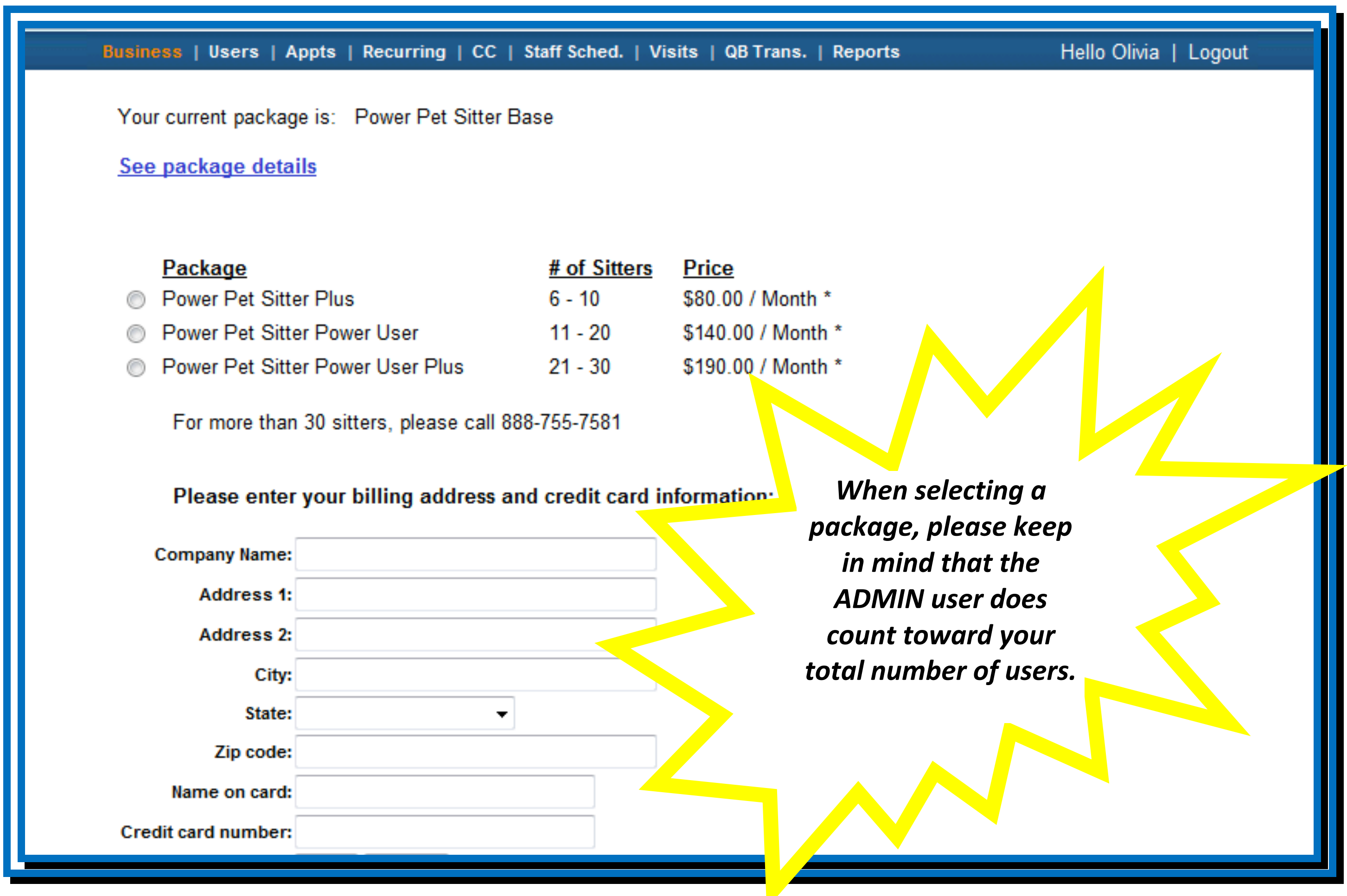


You can run a client report using these properties as a filter under the **Reports** tab.

Account Information –Activate or upgrade your account.

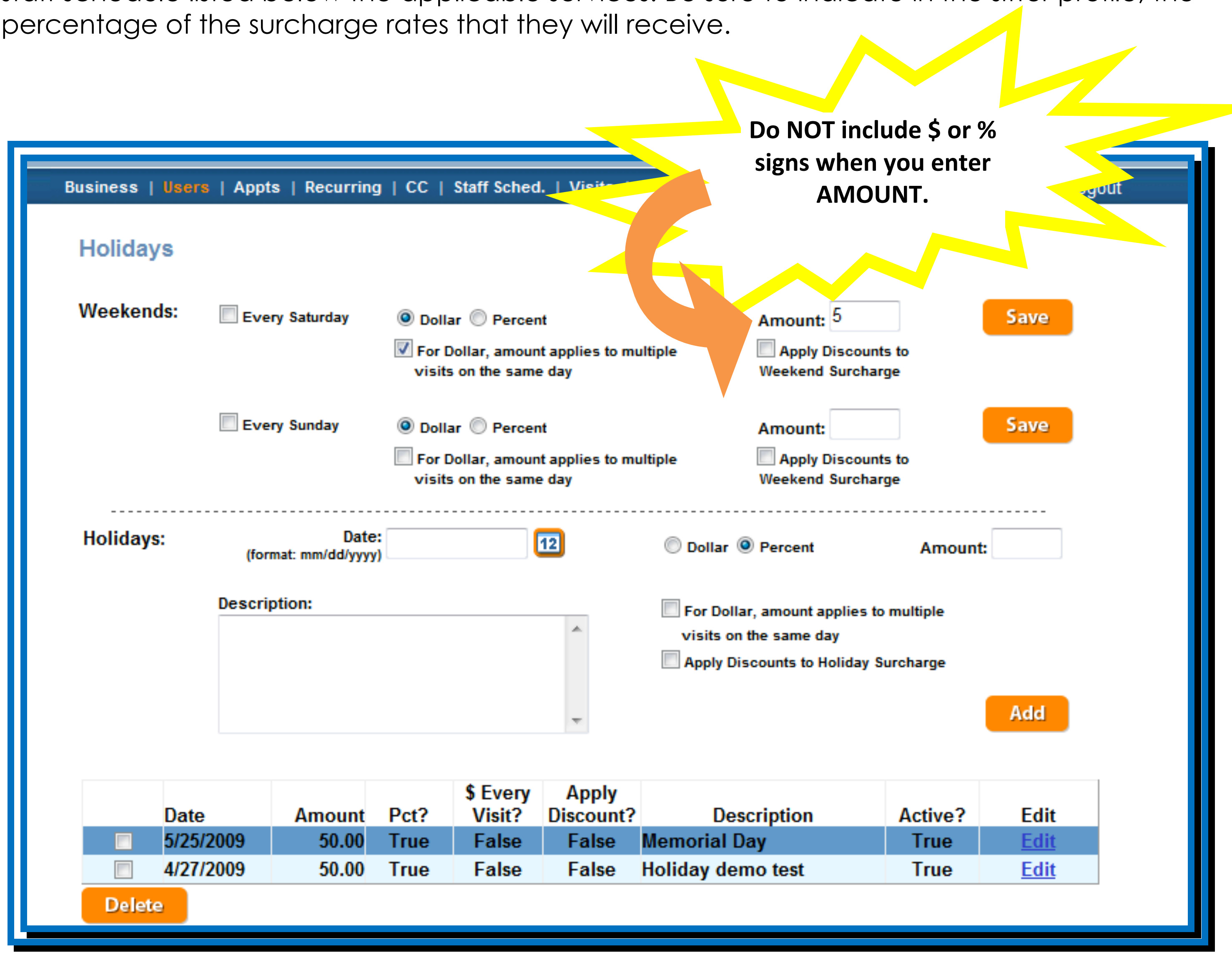
For packages and pricing information please follow this link … http://www.powerpetsitter.com/pet-sitting-software-pricing/.

Once you have selected a package, you will enter your billing address and credit card information. You may upgrade or downgrade your package at any time. You may upgrade directly from this account information screen. To downgrade, please contact the office staff for assistance. There is no penalty for downgrading your account. You may also cancel your account at any time – there is no contract. We bill on a month to month basis, and if cancelling service, you will be charged for the current month, but none after that. We offer a 20% discount if you would like to prepay for the year.



Holidays – Apply a surcharge to holidays and/or weekends.

Holiday/Weekend surcharges will show in the appointment total in the manage screen as **Holiday/Weekend Surcharges.** In the summary page, you will see the surcharges appear listed below the services as it applies to each service. You will also see the surcharge on the staff schedule listed below the applicable services. Be sure to indicate in the sitter profile, the percentage of the surcharge rates that they will receive.



To set up Weekend Surcharges...

- ✓ Check for the surcharge to apply to Saturday and/or Sunday.
- ✓ Select if this surcharge will be a dollar or percentage amount.
- ✓ If you would like for the dollar surcharge to apply to multiple visits scheduled by the client on the weekend day, place a check in the box "For Dollar, amount applies to multiple visits on the same day".
- ✓ Input in the text box the amount (either dollar or percentage) of the weekend surcharge. You **do not** need to include $ or % signs.

To set up <u>Weekend Surcharges continued</u>...

- ✓ Check the "Apply discounts" box if you would like for client discounts to also apply to the weekend surcharge.
- ✓ Click the Save button.

To edit the weekend surcharges, simply make the applicable changes, and click the save button.

For <u>Holiday Surcharges</u>...

- ✓ Enter the date of the upcoming holiday.
- ✓ Input a brief description of the holiday.
- ✓ Select if the surcharge will be a dollar or percentage amount.
- ✓ If you would like for the dollar surcharge to apply to multiple visits scheduled by the client on the specified day, place a check in the box "For Dollar, amount applies to multiple visits on the same day".
- ✓ Check the "Apply discounts" box if you would like for client discounts to also apply to the holiday surcharge.
- ✓ Input in the text box the amount (either dollar or percentage) of the holiday surcharge. You **<u>do not</u>** need to include $ or % signs.
- ✓ Click the Save button, and the holidays will appear in a list below.

In reviewing the holiday, you will see...

- ✓ the date
- ✓ the amount (percentage or dollar value)
- ✓ pct? - (percent) true if the surcharge is a percent, false if not a percent
- ✓ $ every visit? - true if you marked the "For Dollar, amount applies to multiple visits on the same day" box, false if you did not
- ✓ Apply discount? - true if you marked the "Apply Discount" box, false if you did not
- ✓ Description of the holiday
- ✓ Active? - true if the surcharge is active and will be applied, false if not

Edit - click the edit button to make a change to the holiday surcharge. Be sure to save the changes you make!

Users Tab – Manage your client and staff users.

Add new user: Add new client or staff users here. In some cases, your clients will create their own profiles.

Select to add a new client or new staff and click the "Add" button. You will then be routed to a blank client or staff profile for completion.

New Client Profile … Fill in this blank client profile with the applicable information. Required fields are indicated with a red *.

Custom items, (items that you set up to meet your business needs in the Business tab), within the client profile will be …

"Payment Method" (found under **Business – Settings – Payment Options**)

"Client Properties" (found under **Business – Custom Client Properties**)

"How did you hear about us" (found under **Business – Referral Choices**)

"Partner Discount" (found under **Business – Discount Codes**)

"Questions" (found under **Business – Custom Questions**)

All other areas within the client profile are standard within the program.

Login Information -

1. Establish a unique Username for your new client. You may not have duplicate usernames within your account.
2. You must enter an email and confirm that email for your clients. If you have a client who does not have an email address, you may make up a fake email to enter here.
3. Establish a password for your client.

> **Once a profile has been saved, the password box will be blank. You may reset a password at any time by entering in a new password, confirming this password, and clicking "Save" to save the change.*

Admin Note – Enter administrative notes relevant to this client. This information will only be seen by the administrator and selected staff. Administrative notes will appear in the client profile, and within the appointment manage screen.

> ********In each staff profile you will assign administrative permissions. Those staff with permissions to "Approve Appointments" and "Edit client information" will see these admin notes.*

Payment Method – Select the payment method for this client. Payment method selection is a custom feature within the profile. You will generate which methods are available for selection within **Business – Settings – Payment Method.**

> **If a credit card is selected here, you will be prompted to enter the credit card information. Once a credit card number has been entered and saved, the number will scramble. Only the last four digits of the number will appear when you return to the client's profile for their protection.*

Client Properties – Mark a statement with a check if relevant to this client. Client properties are a custom feature within the profile. You will generate a list of these client properties within **Business – Custom Client Properties.**

How did you hear about us? – Select from the drop down box how the client learned about your business. This list of referrals is a custom feature within the profile. You will generate this list of referral options within **Business – Referral Choices**.

Credit Balance – This feature is available for those businesses that will be using the payment gateway authorize.net to charge credit cards through Power Pet Sitter. If a credit card was used to pay for a service that a client then cancels, Power Pet Sitter will automatically apply a credit balance to their account in this field of their profile. The next time the client schedules an appointment, the system will apply this credit to their appointment, and subtract the credit amount from the balance due. This information will also be communicated to Quickbooks online if you are using this feature with Power Pet Sitter. Any cash credits for a client will need to be applied directly to your Quickbooks program (or any other accounting software application you are using).

Staff Assignments – After the initial profile is completed and saved, you will be able to assign sitters for this client. To assign a sitter, click on the drop down menu and a list of sitters who are designated for this client's zip code will appear in a list. You may also assign secondary and 3 alternate sitters for each client. You may adjust these sitters at any time. When an appointment is scheduled, whoever is named as the primary sitter within an account will automatically populate the visit if they don't have any time conflicts. If the primary sitter is unavailable, the secondary sitter will auto populate. The system will assign sitters in this manner down the list of assigned sitters.

Make Inactive – Mark here to inactivate a client. When searching for clients, inactive clients will appear in a gray box. You will no longer be able to schedule appointments for inactive clients and the clients will no longer be able to login.

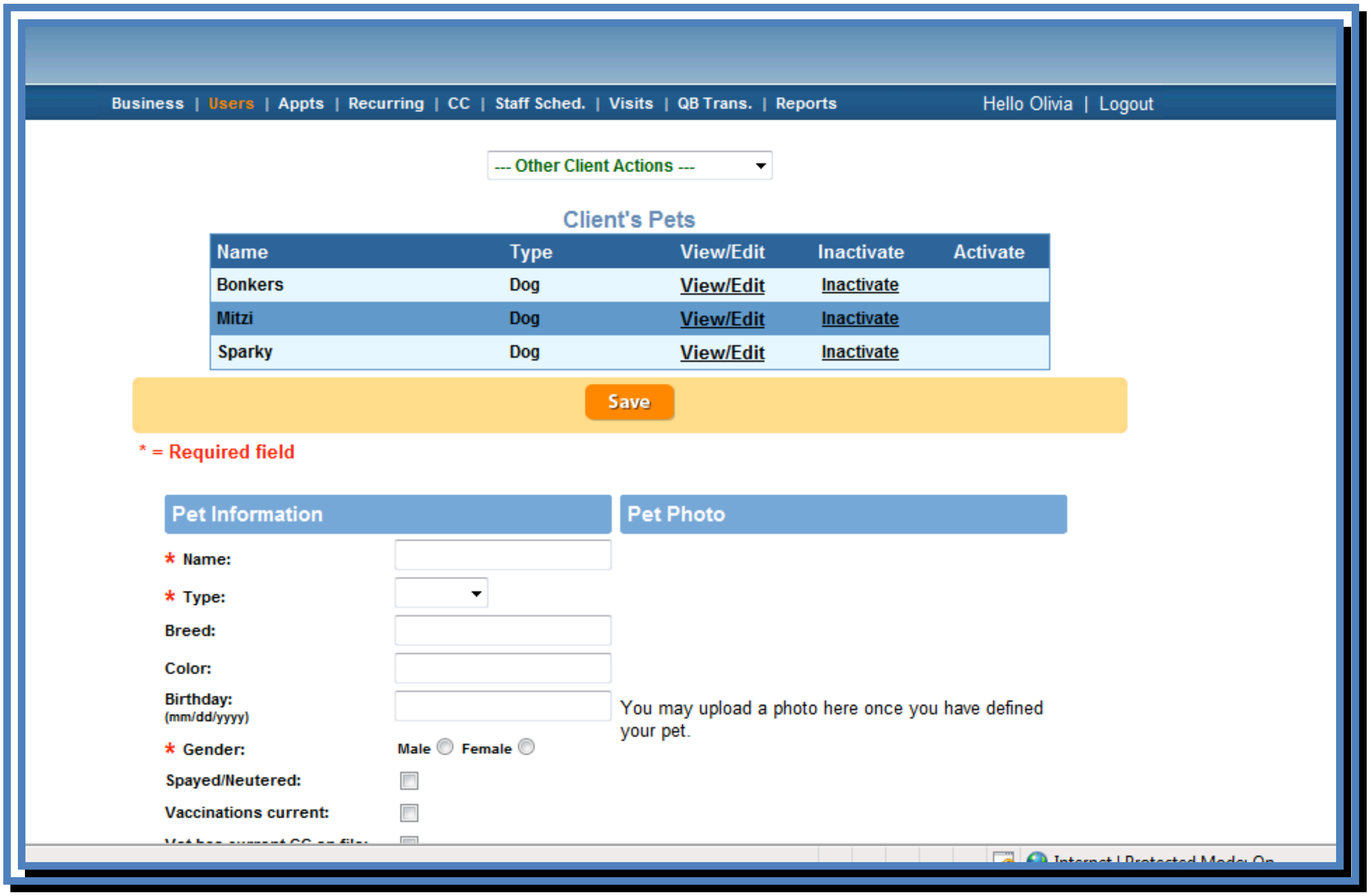
Discounts – Enter a discount to be applied to all invoices generated for this client.

Questions – Questions are custom questions to add within the profile. Generate these questions within **Business – Custom Questions**. Only questions marked as client-based questions will appear here within the client profile. Service-based questions are related to specific services, and will only appear to be answered when the designated service is scheduled. Both client-based and service-based questions will appear at the bottom of the printed client information page.

Client Notes – Enter client notes that will be viewed by staff and administrators only (not clients). These client notes will appear within the client profile (when being viewed by staff), in the appointment manage screen, and within the printed client information page.

Client Defaults – Set client specific rates for services. Rates entered here will override the system prices set for services when this client is scheduled for an appointment. These client default rates will always override the system rates for services. If no prices are entered here, the price of a scheduled service will default to the system amount for the service, as established when creating services. You can also set start times related to services for this client. When a specific start time is entered here, the time will appear on the staff's schedule when viewed in the system.

Click the SAVE button - you will then be directed to the Pet Profile.



Pet Profile - input applicable pet information, upload a photo, and select a veterinarian or input a new veterinarian.

New Staff Profile … Fill in this blank staff profile with the applicable information. Required fields are indicated with a red *.

Login Information –

1. Establish a unique Username for your staff member. You may not have any duplicate usernames within your account.
2. Enter an email address for your staff member. Many communications will be sent to your sitters via their email, therefore it is important for them to provide an email that they will regularly check.
3. Establish a password for your staff.

> **Once a profile has been saved, the password box will be blank. You may reset a password at any time by entering in a new password, confirming this password, and clicking "Save" to save the change.*

Names – The display name that you create for your staff will be the name that appears when assigning the staff member within the system.

Admin Note - Enter administrative notes relevant to this staff. This information will only be seen by the administrator and selected staff.

> **This area within the staff profile will NOT be viewable or accessible by a staff member when they are logged in themselves, unless you give them administrative permission to "Edit staff information".*

Zip Codes – Indicate here which zip codes the staff is available and/or willing to perform sits within. Select a zip code from the "Available ZipCodes" box, and click the right arrow to send the selected zip code to the "Your ZipCodes" box on the right.

Staff Information – Enter applicable information about your staff.

1. If you select to make a staff "Unavailable", they will not be able to be assigned to any appointments. These staff will not appear in the generated list of staff when choosing to assign a sitter to a visit.
2. If you select to make a staff "Inactive", they will no longer be able to login, and will not be available for assignment nor will they receive any emails from the program. When you search for an inactive staff they will appear in a gray box. Inactive staff may always be re-activated by an administrator.
3. Select "Receive Nightly Schedule" for your staff to receive a nightly email of their upcoming schedule. You will set the number of days of their upcoming schedule to be received in the **Business – Settings – Miscellaneous Options** area.
4. For staff type, select whether your staff member is an employee or a vendor. It is important that you indicate a staff member as a vendor if they are an independent contractor, for IRS purposes. If you are using Quickbooks online above the Simple Start version, you will be able to send vendor bills from Power Pet Sitter to Quickbooks for management.

> **This area within the staff profile will NOT be viewable or accessible by a staff member when they are logged in themselves, unless you give them administrative permission to "Edit staff information".*

Custom Rates – Assign your sitter's pay rate in this area. You may select to fill all rates to a dollar or percentage amount. Select for the rate to be based on a dollar or percentage amount on the left side of the page. To the right, enter the numerical amount (dollar or percentage) for all the rates to be set to, and click "Set". To change the price of only one rate, simply change the rate amount for the specific service to the desired amount.

> **This area within the staff profile will NOT be viewable or accessible by a staff member when they are logged in themselves, unless you give them administrative permission to "Edit staff information".*

Exception Hours – After the new staff profile has been completed and saved, the staff member or administrator will be able to enter exception hours. To enter an exception such that it is always applicable for a certain day, select the day or days of the week during which the exception time occurs. Beneath the days, enter the time period during that day that the staff is unavailable. If the staff is unavailable for the entire day, leave the times blank. Click the “Save” button. This exception will then appear in a list of Current Exceptions. Your staff may also enter a specific day or date range during which they will not be available. Enter the specific days and times that the sitter will not be available, and click the “Save” button. Again, leave Time of day blank for the entire day to apply. Each day and time period will then generate in the list of Current Exceptions. These exceptions may be deleted at any time when no longer applicable.

Administrative Permissions – As the administrator, you have the ability to assign administrative permissions to a staff member.

**Administrative Permissions may only be set by the ADMIN user.*

Approve appointments – When logged in to the system, a staff member with this permission will be able to review a scheduled appointment, manage the appointment, and approve it.
Schedule appointments – This permission allows the staff member to schedule appointments for clients.
Edit client information – Assign this permission to allow for the staff member to search for any client, and have access to edit the client information.
Edit staff information – This permission allows the staff member to search for any staff, and to view and edit any staff member’s information.
View staff schedule – This permission allows the staff member to search, view, and edit any other staff within the system.
Report Engine – This permission will provide the staff member with the ability to run any report within the **Reports** tab when logged in.
Process CC/Invoice – This permission will give the staff member access to the **CC** tab when logged in. The staff will be able to process credit card payments and mark invoices as paid when applicable.
Receive Credit Card Emails – This permission will allow for the staff member to receive emails from Power Pet Sitter of credit card transactions.

Overbookings – Your established time blocks will appear here. Set a maximum number of visits this sitter will be scheduled for in each time block. The visit before the limit has been reached, a sitter’s name will appear in red when being scheduled for an appointment. You may override the overbooking and still schedule the sitter for the visit; however their name will appear in red indicating a conflict.

**This area within the staff profile will NOT be viewable or accessible by a staff member when they are logged in themselves, unless you give them administrative permission to “Edit staff information”.*

Ranking – If you would like to assign a ranking to your sitter you may do so here. Select between 1 and 5 stars. This number will appear to administrators and select staff (as provided with administrative permissions) in parenthesis next to the staff’s name, when selecting to assign a staff member to a visit.

Users Tab Cont'd

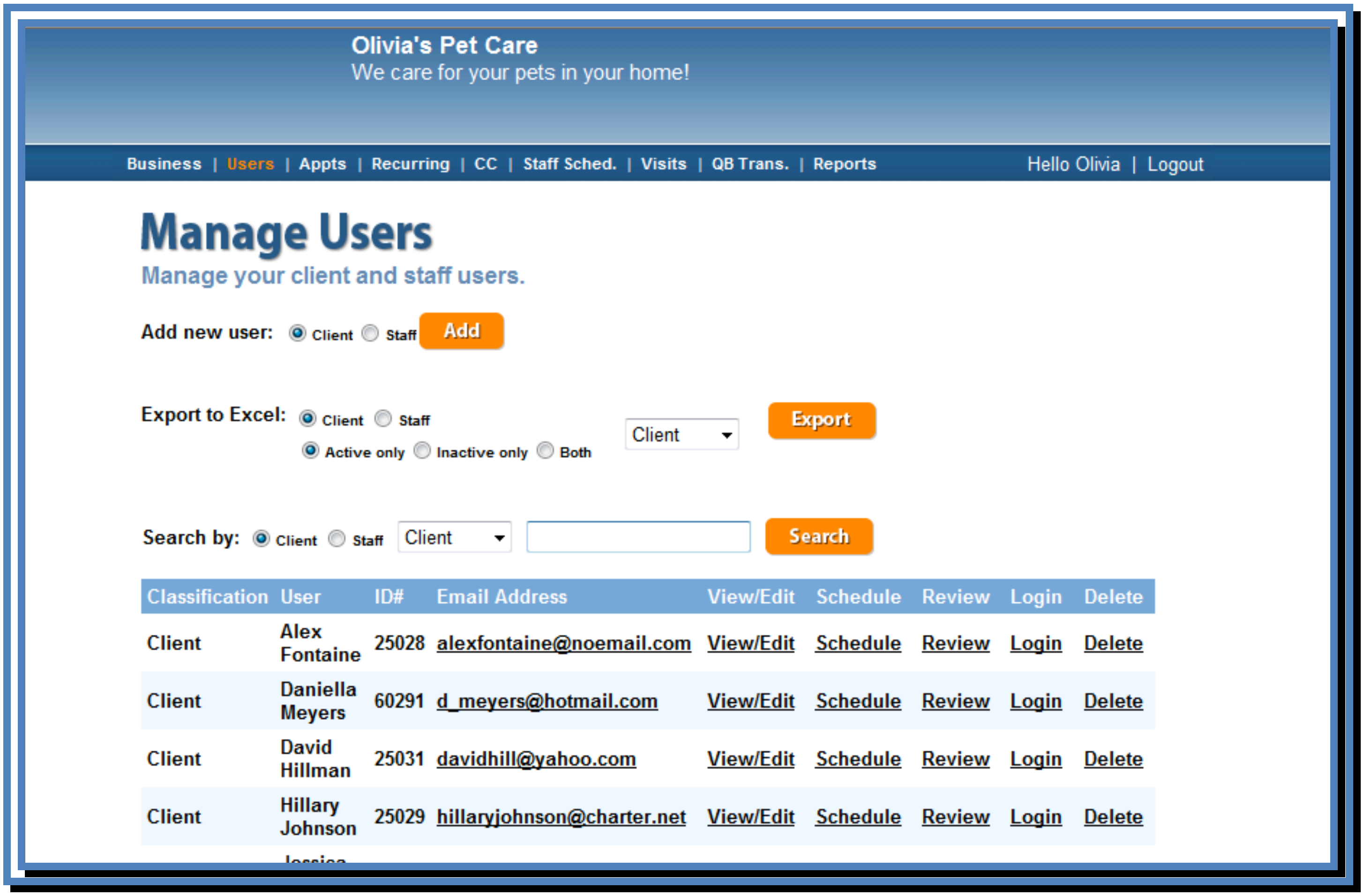
Export to Excel – Choose to export client or staff data to an Excel spreadsheet.

1. Select Client or Staff data to export.
2. Choose to export information on active or inactive individuals or both.
3. Click the "Export" button.

Search by – Search for your clients or staff.

1. Select Client or Staff to search for a client or staff.
2. Leave the box blank and ALL clients will be listed in alphabetical order by first name.
3. To narrow your search, type the first name, last name, username, OR pet name for the client or staff you are searching for and click "Search". A list will appear of clients or staff. Active clients or staff will appear in white and light blue rows. Inactive clients or staff will appear in a gray row. Once a list of clients or staff appears, select the type of action indicated to the right of the name, which you would like to perform.

Search by: For clients…



Email address – click on the client's email address to send them an email.
View/Edit – click on this link to view and edit the client profile including pet information.
Schedule – click on this link to schedule an appointment for the client.
Review – click on this link to review a list of client appointments (approved, unapproved, and cancelled) within a date range you specify.
Login – click on this link to login as the client. You will see what it looks like to be logged in as if you were the client.
Delete – click on this link to delete a client. **Please note! Once you schedule an appointment for a client, even if you cancel the appointment, you will not be able to delete this client. You can always inactivate a client, but you will not be able to permanently remove a client from the account.*

Search by: For staff …

Email address – click on the staff's email address to send them an email.
View/Edit – click on this link to view and edit the staff profile.
Login – click on this link to login as the staff member. You will see what it looks like to be logged in as if you were the staff member.
Delete – click on this link to delete a staff. **Please note!* You *may* delete a *staff* member to permanently remove them from your account. HOWEVER any history related to that client and visits they performed will be deleted. You may always inactivate a staff to maintain the staff's history. Power Pet Sitter WILL NOT be able to retrieve any history once it has been deleted. Power Pet Sitter STRONGLY advocates that you do not delete anything, but rather inactivate your clients or staff when necessary.*

Appts Tab – Search for appointments within this tab.

Status – select the type of appointment you want to search for from the drop down menu.

Unapproved
Approved
Cancelled/Rejected
Completed
Contains unconfirmed Visits
Date Range - provide a date range within which you would like to search for an appointment.
Appointment # - you may pull up a single appointment directly by entering the appointment number here and selecting to "Search" for that appointment, or be taken directly to the manage screen by selecting the "Manage" button.

Recurring Tab – A list of all of your recurring appointments will appear in this screen.


Olivia's Pet Care
We care for your pets in your home!

Business | Users | Appts | Recurring | CC | Staff Sched. | Visits | QB Trans. | Reports   Hello Olivia | Logout

Recurring Schedule

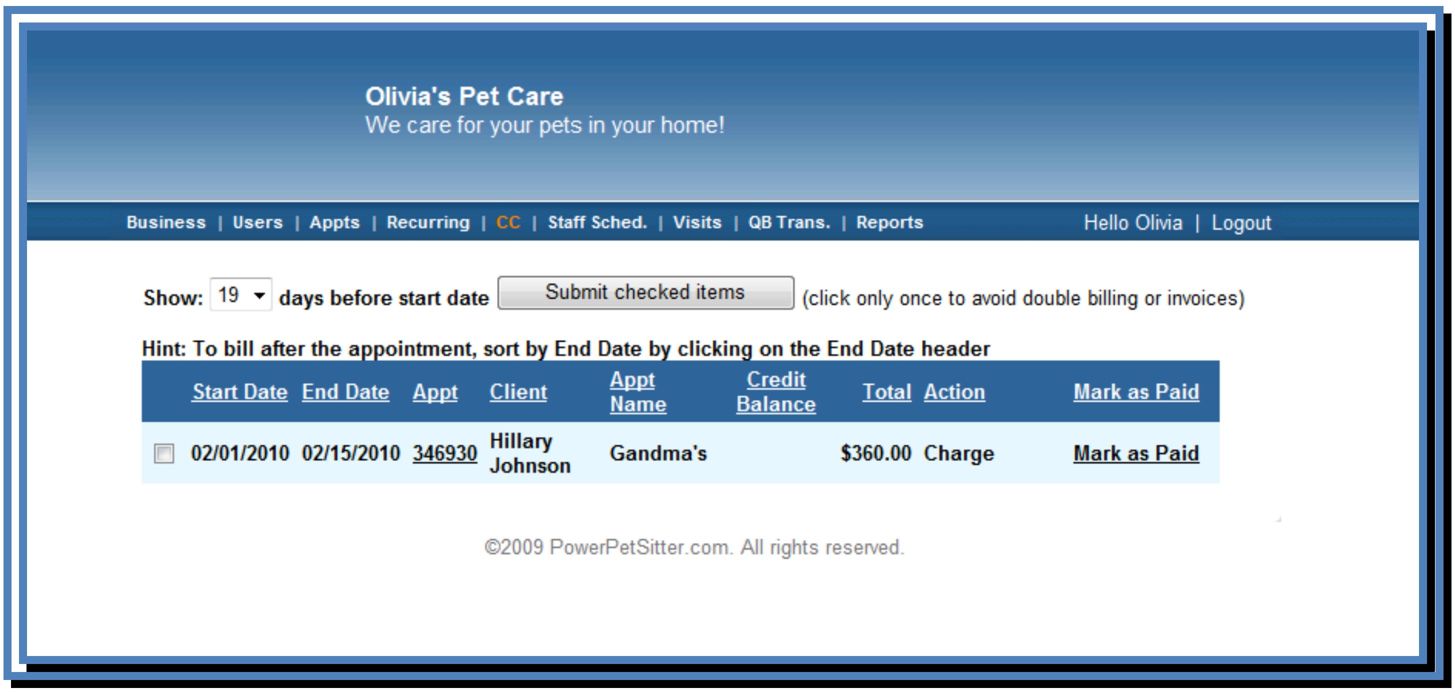
Client	Appointment Name	Start Date	End Date	Schedule	Delete
Fontaine, Alex	Tues & Thurs	9/8/2008	9/14/2008	Schedule	Delete
Rowen, Mia	Weekly Tues/Thurs	9/8/2008	9/14/2008	Schedule	Delete
Tell, Jessica	Sat & Sun	9/8/2008	9/14/2008	Schedule	Delete
Tell, Jessica	Weekly	9/8/2008	9/14/2008	Schedule	Delete
McCray, Kristen	Bi-weekly	9/15/2008	9/28/2008	Schedule	Delete
Rowen, Mia	Bi-weekly	9/15/2008	9/28/2008	Schedule	Delete
Johnson, Hillary	Bi-Weekly	9/20/2008	10/3/2008	Schedule	Delete
Hillman, David	Thursday's	10/1/2008	10/31/2008	Schedule	Delete
McCray, Kristen	Saturday's	10/1/2008	10/31/2008	Schedule	Delete
Rowen, Mia	Monthly	10/1/2008	10/31/2008	Schedule	Delete

When you are ready to schedule the next recurring appointment for a client, select the "Schedule" button next to the client's name, and the recurring appointment will be scheduled. You will then be directed to the manage screen to manage and approve the appointment. When you return to the recurring tab, the start and end date will indicate the time frame of the next appointment for scheduling. Once a recurring appointment has been scheduled from the recurring tab, you may manipulate that appointment without affecting the original schedule of the recurring appointment. If for instance your client wants to add in an additional service during one of their regular recurring weekly schedules, you will simply add the service to the scheduled appointment - the next weekly appointment in the recurring tab will not contain the additional service. If you need to make a permanent change to a recurring appointment, select the "Delete" button in the recurring tab to remove the old recurring schedule, and then schedule a new recurring appointment to reflect the permanent changes.

CC Tab – Power Pet Sitter integrates with the payment gateway authorize.net to charge credit cards.

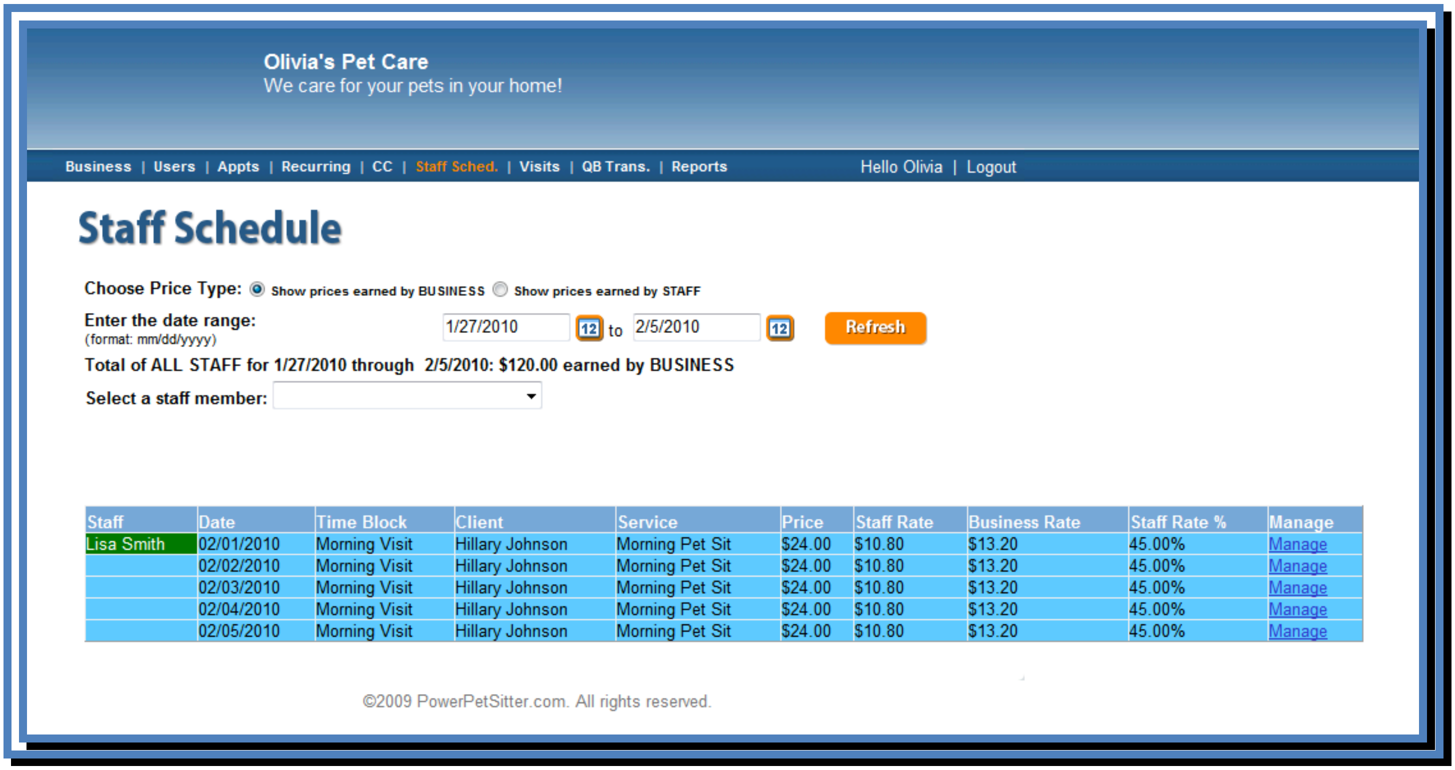
If you have selected to charge credit cards using Power Pet Sitter, you will do so in this tab. Begin by choosing the number of days before the start date of an appointment you would like for appointments to appear in this list. All appointments for clients with credit cards on file who have appointments for billing within the specified time will appear in this list.

**You may select to order this list in different manners. The white font headings for each appointment will allow you to sort the list according to your needs. For example to sort the list by end date as opposed to start date, click on the white font "End Date" and the list will re-sort based on the ending dates of the appointments.*



You will select the appointments that you want to charge and click the "Submit checked items" button. The client credit card will then be charged, and an invoice will be generated for this appointment within Quickbooks (if you are integrating Quickbooks online with Power Pet Sitter). If a client is normally a credit card client, but you do not want to charge their card for an appointment, click on the black "Mark as Paid" link by the appointment that you do not want to charge. This will then communicate the paid invoice to Quickbooks and remove the appointment from the list.

Staff Schedule Tab – Review staff schedules individually or as a whole.

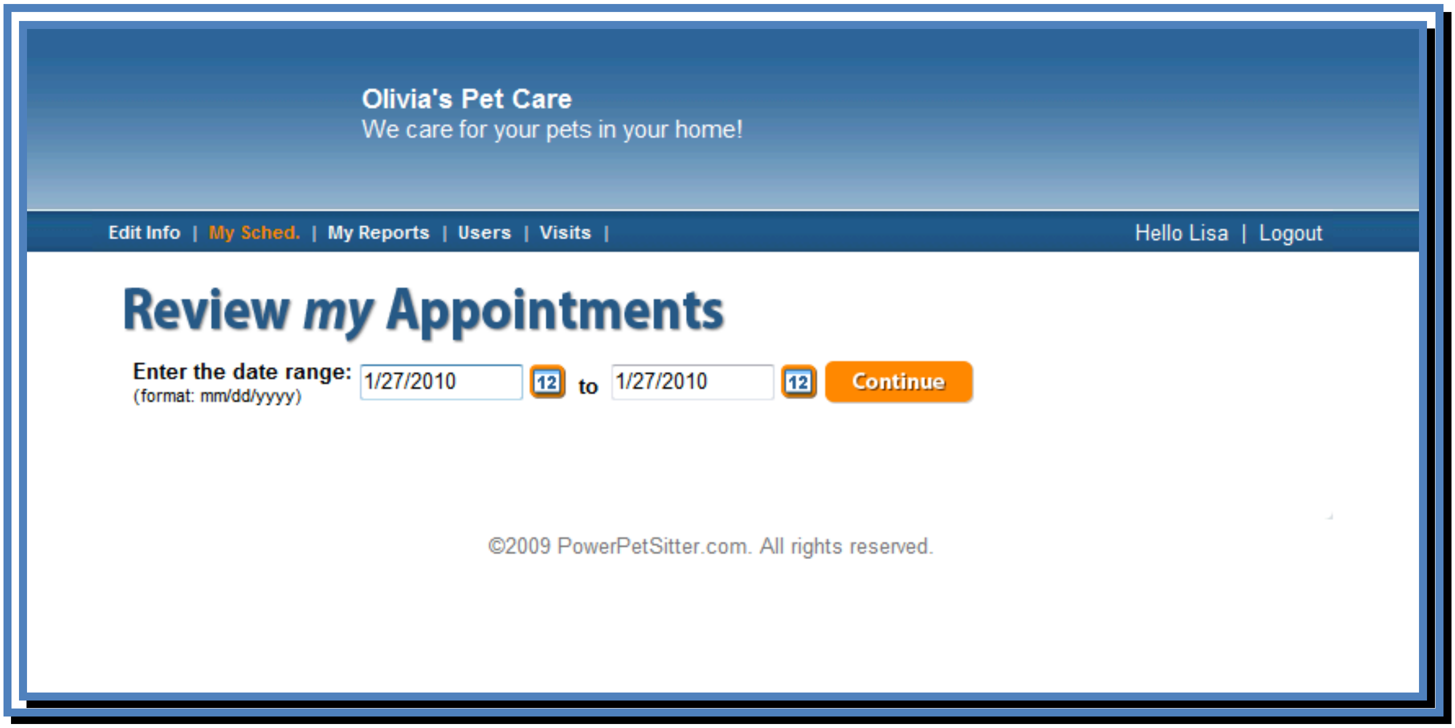


Staff	Date	Time Block	Client	Service	Price	Staff Rate	Business Rate	Staff Rate %	Manage
Lisa Smith	02/01/2010	Morning Visit	Hillary Johnson	Morning Pet Sit	$24.00	$10.80	$13.20	45.00%	Manage
	02/02/2010	Morning Visit	Hillary Johnson	Morning Pet Sit	$24.00	$10.80	$13.20	45.00%	Manage
	02/03/2010	Morning Visit	Hillary Johnson	Morning Pet Sit	$24.00	$10.80	$13.20	45.00%	Manage
	02/04/2010	Morning Visit	Hillary Johnson	Morning Pet Sit	$24.00	$10.80	$13.20	45.00%	Manage
	02/05/2010	Morning Visit	Hillary Johnson	Morning Pet Sit	$24.00	$10.80	$13.20	45.00%	Manage

1. Select whether you would like to see prices as earned by the Business, or prices as earned by the Staff.
2. Enter the date range you would like to see.
3. Select the staff member from the drop down menu for whose schedule you would like to see. In the drop down list, you will see the names of all staff members. Those staff with visits in the specified time range will have a dollar amount in parenthesis next to their name. This amount will be either the total of their visits in the range as earned by the Business, or as earned as a Staff, depending on your selection in #1. When you select a staff member's name their schedule will appear for the specified range. You can also review the staff schedule for all staff. From the drop down menu, select the first option in your list, "SHOW ALL STAFF MEMBERS". All visits will then be listed based on each sitter – you will also see a breakdown of the service price, the staff rate, business rate, and the staff pay rate.

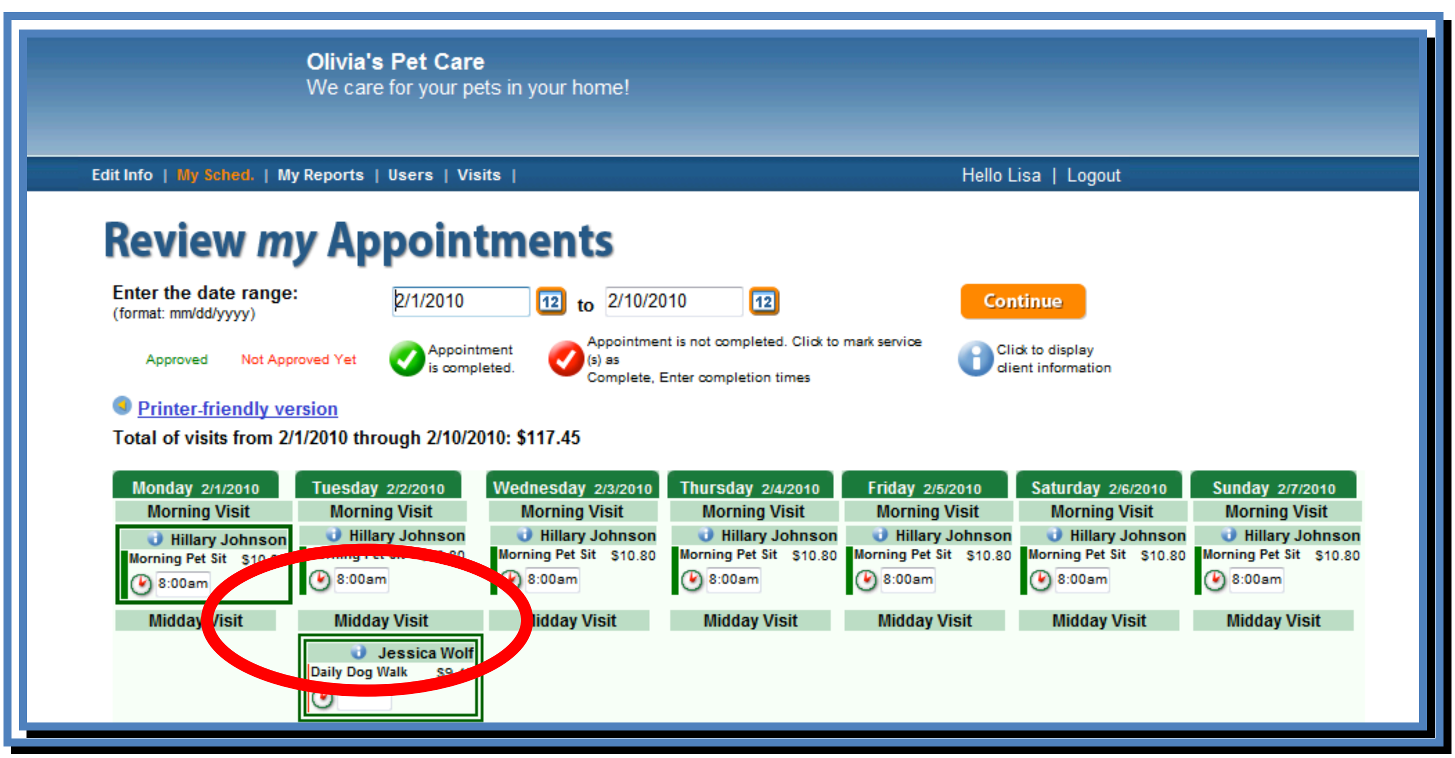
When your staff login to the system under their unique username, they will have their own modified schedule tab. The staff tab is named **My Sched. Staff will only be able to review their own schedule unless given an administrative permission to do otherwise (assigned by the administrator within the staff profile). Staff with administrative permission will have a **My Sched** tab in addition to a **Staff Sched** tab.*

My Sched Tab (for staff) - When staff login under their unique usernames, they will be prompted to enter a date range for which they would like to review their schedule.



They will enter the range and click the orange "Continue" button at which point their schedule will appear. The icons within the schedule tab have meaning …

1. A green vertical bar along the left side of the service indicates that the appointment has been approved.
2. A red vertical bar along the left side of the service indicates that the appointment has not yet been approved. Example Jessica Wolf below.
3. A green checkmark means the appointment has been completed and marked as completed by the staff member.
4. A red checkmark means the appointment has not been marked as completed by the staff member.
5. A blue i icon is a link to the clients printable profile information.
6. A green box around a service indicates that this is the first visit within the scheduled appointment. A double box around a service indicates that this is the first and last visit within the appointment (only one visit was scheduled).
7. A red box around a service indicates that this is the last visit within the scheduled appointment.
8. A clock with a box to the right is a tool that can be used by either the administrator or the sitters – whichever is suitable for your company. Enter a time here for the visit to be completed. An administrator can place a specific time in this box for the visit to be completed – staff will then see the time for the visit to be completed. If a time is saved for a service within the "Client Default" area of the client profile, this time field will automatically be populated for the associated services. If you choose not to use this feature as an administrator, you could allow your staff to enter times here to help them manage their own schedules. Additionally you could have your staff enter times here once the visit has been completed as a way for them to communicate to you when they actually did the visit. This is a flexible tool for you to use as you see fit for your business. Remember to click the orange "Save Start Times" button to save any changes made to these times.

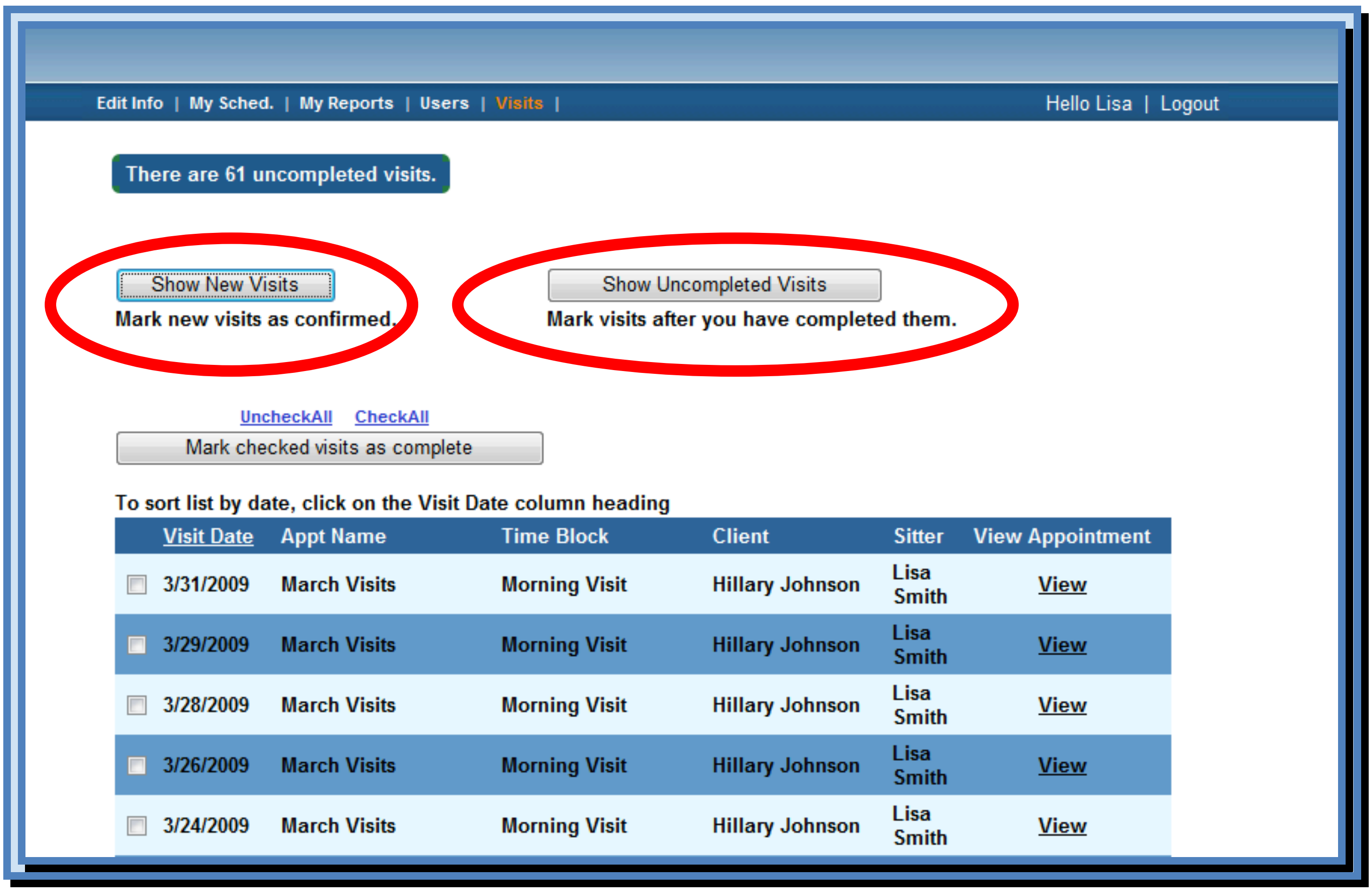


Visits Tab – Use this tab to mark new visits as confirmed as well as to mark visits after they have been completed.

1. Click the "Show New Visits" button tab. A list of all new visits will appear for which this individual has been scheduled to complete. To confirm these visits, select each visit, and click the "Marked checked visits as confirmed" button.

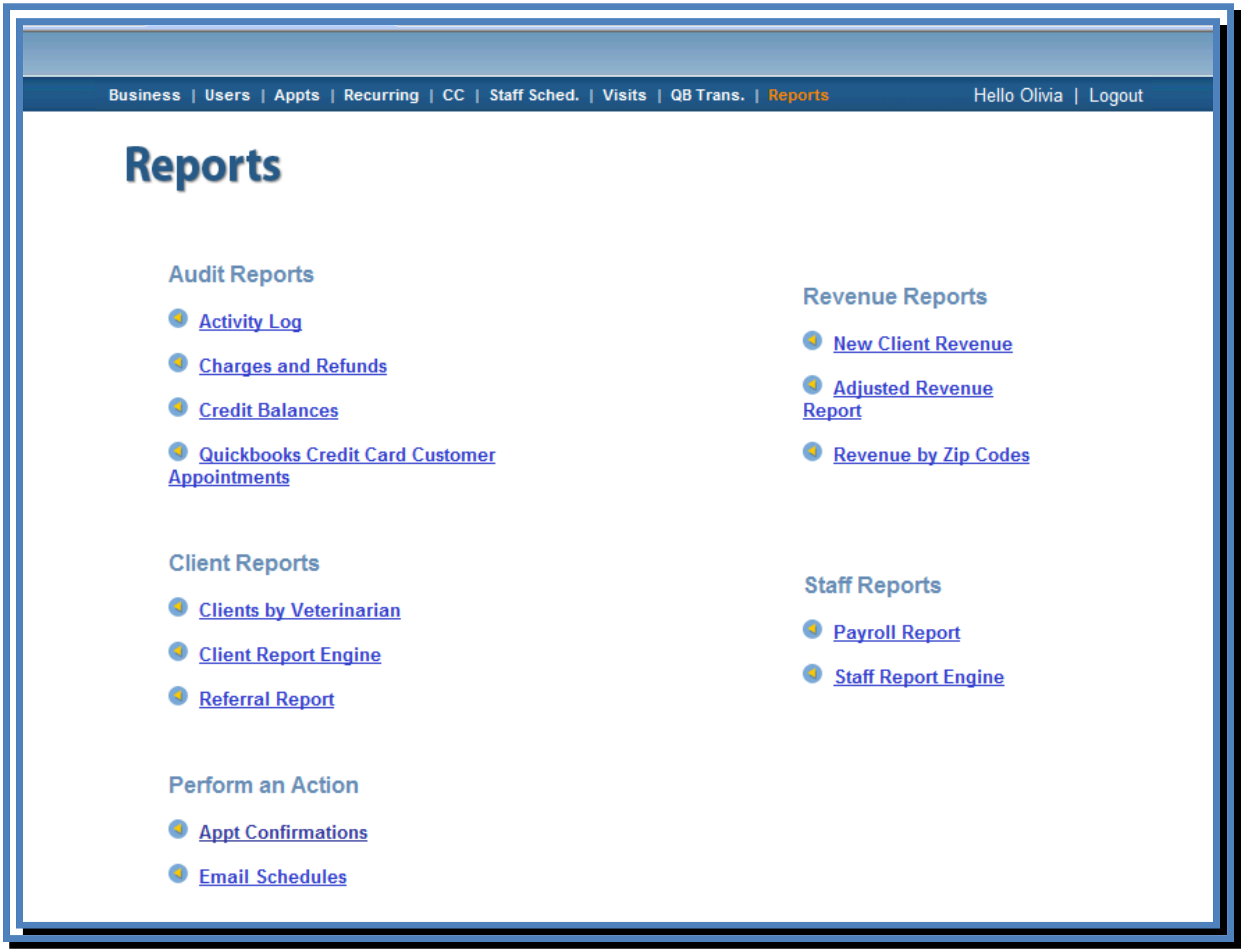
   Within the manage screen, those visits that have not been confirmed by an assigned staff will have an orange background appear behind the name of the service. Once the sitter has confirmed the visit, the background will be white. You may search for appointments containing any unconfirmed visit under the **Appts tab – see information above.*

2. Click the "Show Uncompleted Visits" button to mark visits as completed. A list of services will appear, mark the visits after you have completed them, and click the "Mark checked visits as complete" button to complete the process.



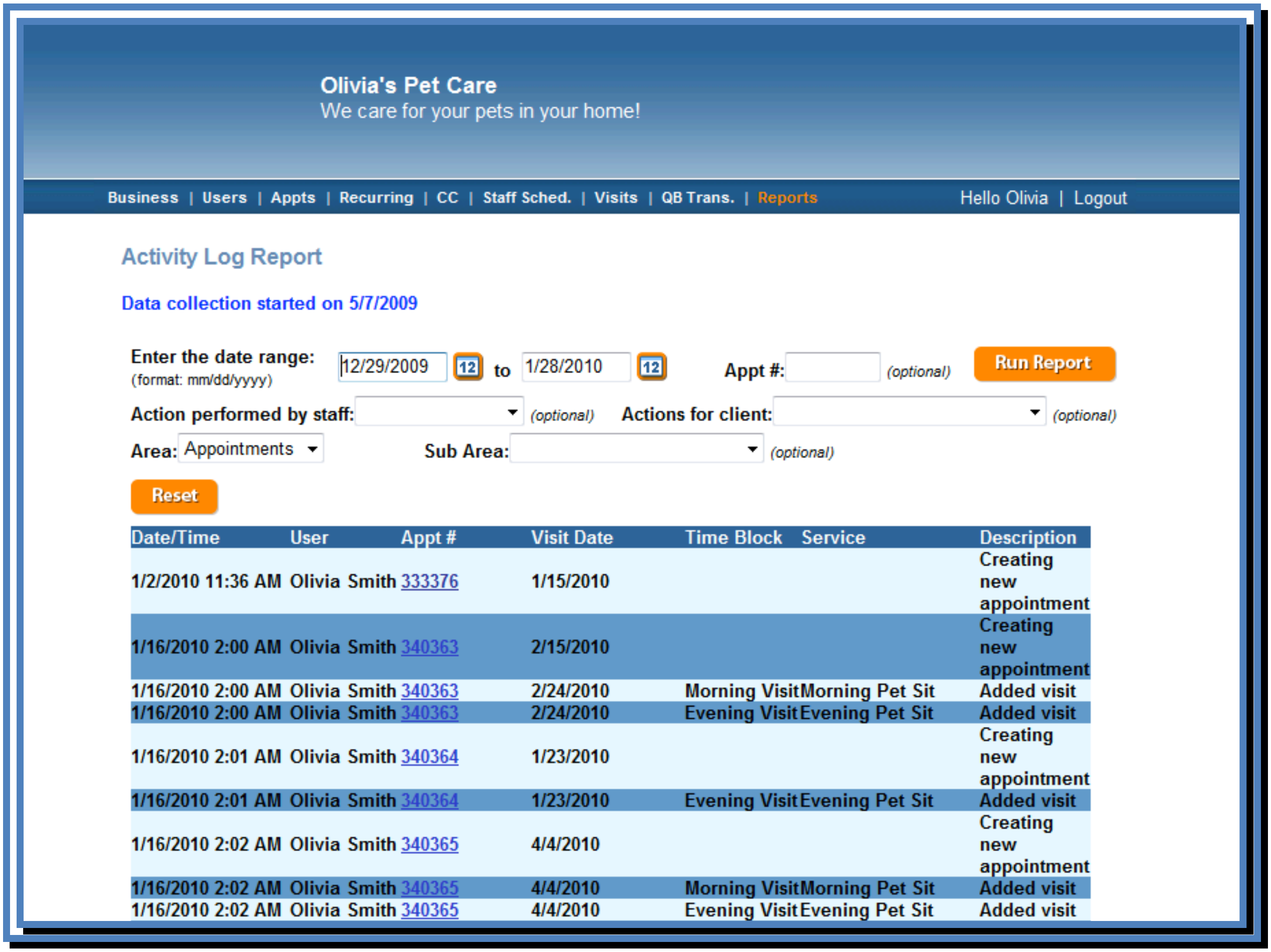
QB Transaction Tab – Use the tab to search for transactions related to Quickbooks online. You can search for Quickbooks invoices based on the following filters: Date range based on last modified date of transaction, Transaction Types – Select Invoices, Vendor Bills, or Client Payments from the drop down menu, Status – Select Failures or Successes from the drop down menu, an appointment id number, or a Message. Select your filter, and click the “Search” button. You will also find that a list of failed Quickbooks transactions will automatically populate this list when you first select the tab. If you receive a Quickbooks error, you may review the error message in this tab. You may try to reprocess the invoice, or choose to delete it from the list.

Reports Tab – Use this tab to generate reports of your client, staff, and business data. You may also send emails to staff and clients from the Client and Staff Report Engines.



Activity Log

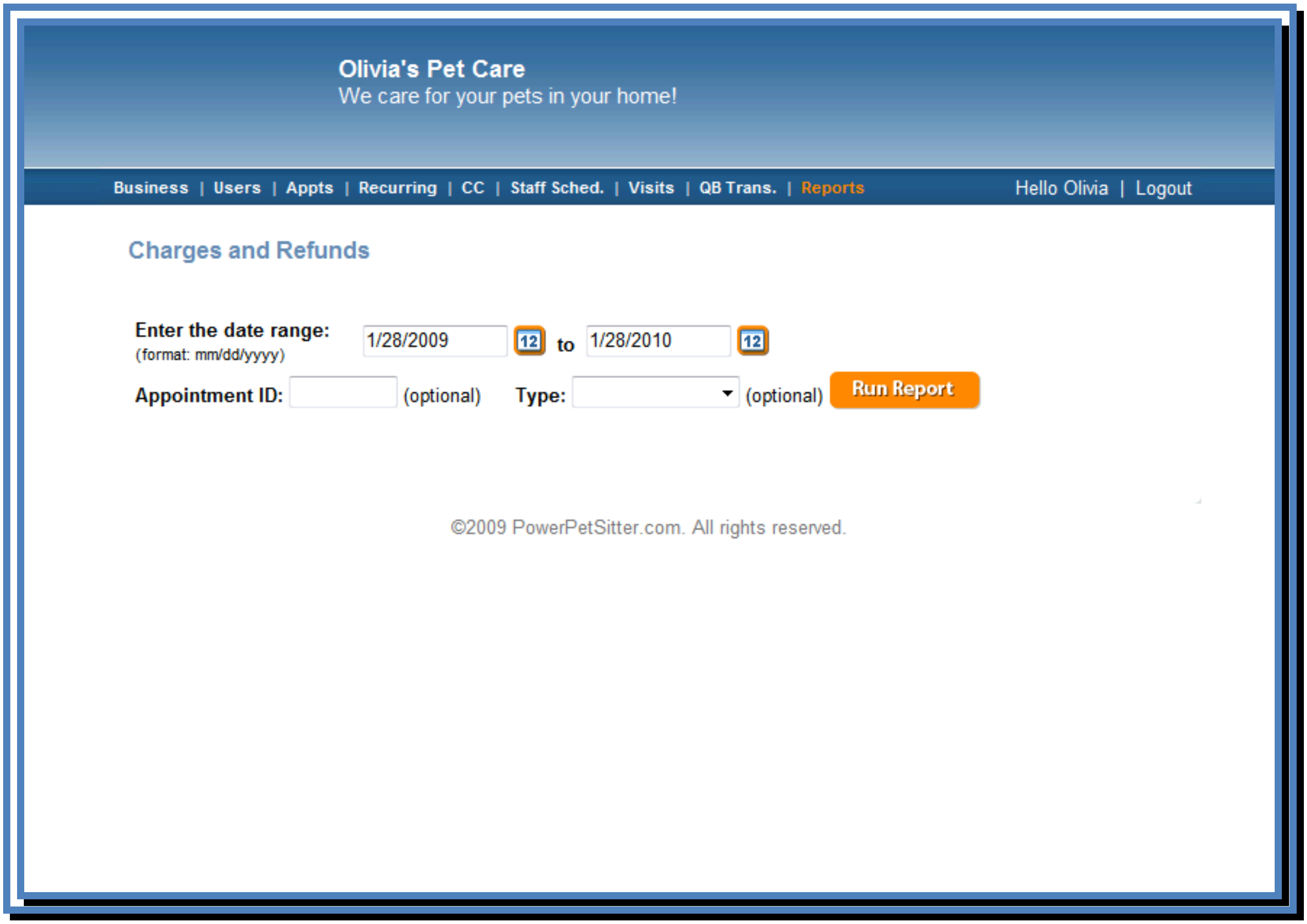
Review a log of all appointment related activity in your account. Indicate the desired date range for which you want to search. You can narrow your search further by inputting a specific appointment number or activity related to a specific client or staff member within the desired time period. Once you have set your parameters, click the "Run Report" button and the activity log will generate. Information returned will include the specific date and time the action was performed, the user logged in to perform the action, the related appointment number and the action being performed.



Date/Time	User	Appt #	Visit Date	Time Block	Service	Description
1/2/2010 11:36 AM	Olivia Smith	333376	1/15/2010			Creating new appointment
1/16/2010 2:00 AM	Olivia Smith	340363	2/15/2010			Creating new appointment
1/16/2010 2:00 AM	Olivia Smith	340363	2/24/2010	Morning Visit	Morning Pet Sit	Added visit
1/16/2010 2:00 AM	Olivia Smith	340363	2/24/2010	Evening Visit	Evening Pet Sit	Added visit
1/16/2010 2:01 AM	Olivia Smith	340364	1/23/2010			Creating new appointment
1/16/2010 2:01 AM	Olivia Smith	340364	1/23/2010	Evening Visit	Evening Pet Sit	Added visit
1/16/2010 2:02 AM	Olivia Smith	340365	4/4/2010			Creating new appointment
1/16/2010 2:02 AM	Olivia Smith	340365	4/4/2010	Morning Visit	Morning Pet Sit	Added visit
1/16/2010 2:02 AM	Olivia Smith	340365	4/4/2010	Evening Visit	Evening Pet Sit	Added visit

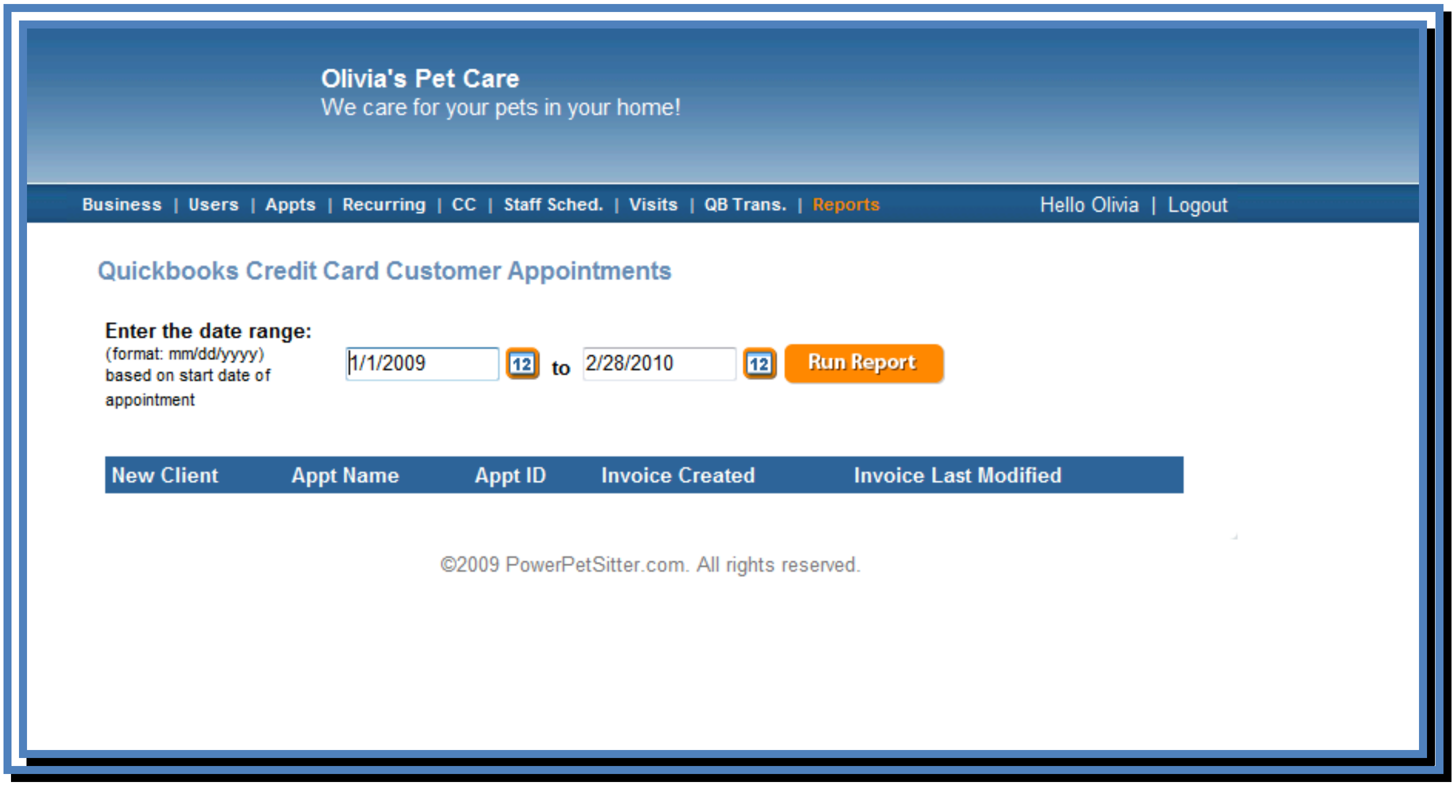
Charges & Refunds

For businesses that are integrated with authorize.net and process client credit cards through Power Pet Sitter, use this report to see a log of all charges that have occurred through your Power Pet Sitter account. Input the date range you would like to search, and click the "Run Report" button. You have the option to narrow your search with an appointment number. The report will return a list of all charges including: date and time of charge; appointment number; client's name, amount of charge, and the user that logged in and ran the charge.



Credit Balances – See a list of those clients with a credit balance on their account. Once you click on the "Credit Balances" link, a list of clients and the credit balance amount within their profile will appear, in addition to the client payment type. *Credit balances are only applicable for clients that pay by credit card.*

Quickbooks Credit Card Customer Appointments – Review a list of invoices created for Quickbooks of credit card customers. Enter a date range based on the start date of the appointment. Click the "Run Report" button, and a list of clients and appointments with a start date within the established time frame will appear. You may review the appointment ID, and when the invoice was created and last modified per client.



New Client Revenue – Review new client data in this report. Enter a date range for which you would like to see new client information. A list of new clients established during the provided time frame will appear. You will see the client name, the primary sitter assigned, how they were referred, their zip code, and their revenue.

Adjusted Revenue Report – See revenue for an indicated time period based on different services. Enter a time period during which you would like to see generated revenue. Click the "Run Report" button and a list of services will appear. You will see the total number of services completed, the revenue earned by each service, the average charge for each service, and the percent of business each service filled. You will see this for both service totals without considering discounts and a second column with discount consideration.

Revenue By Zip Code – See revenue earned based on zip code. Enter a time frame during which you would like to see generated revenue. Click the "Run Report" button, and a list of zip codes will appear. You will also see the number of clients in the given zip code, as well as the revenue earned in each zip code for the indicated date range.

Clients by Veterinarian – See a list of all veterinarians, and a list of those clients based on their veterinarian. When you select the "Clients by Veterinarian" link, a list of all veterinarians will appear. Below each vet, a list of clients and their pets will appear.

Olivia's Pet Care
We care for your pets in your home!

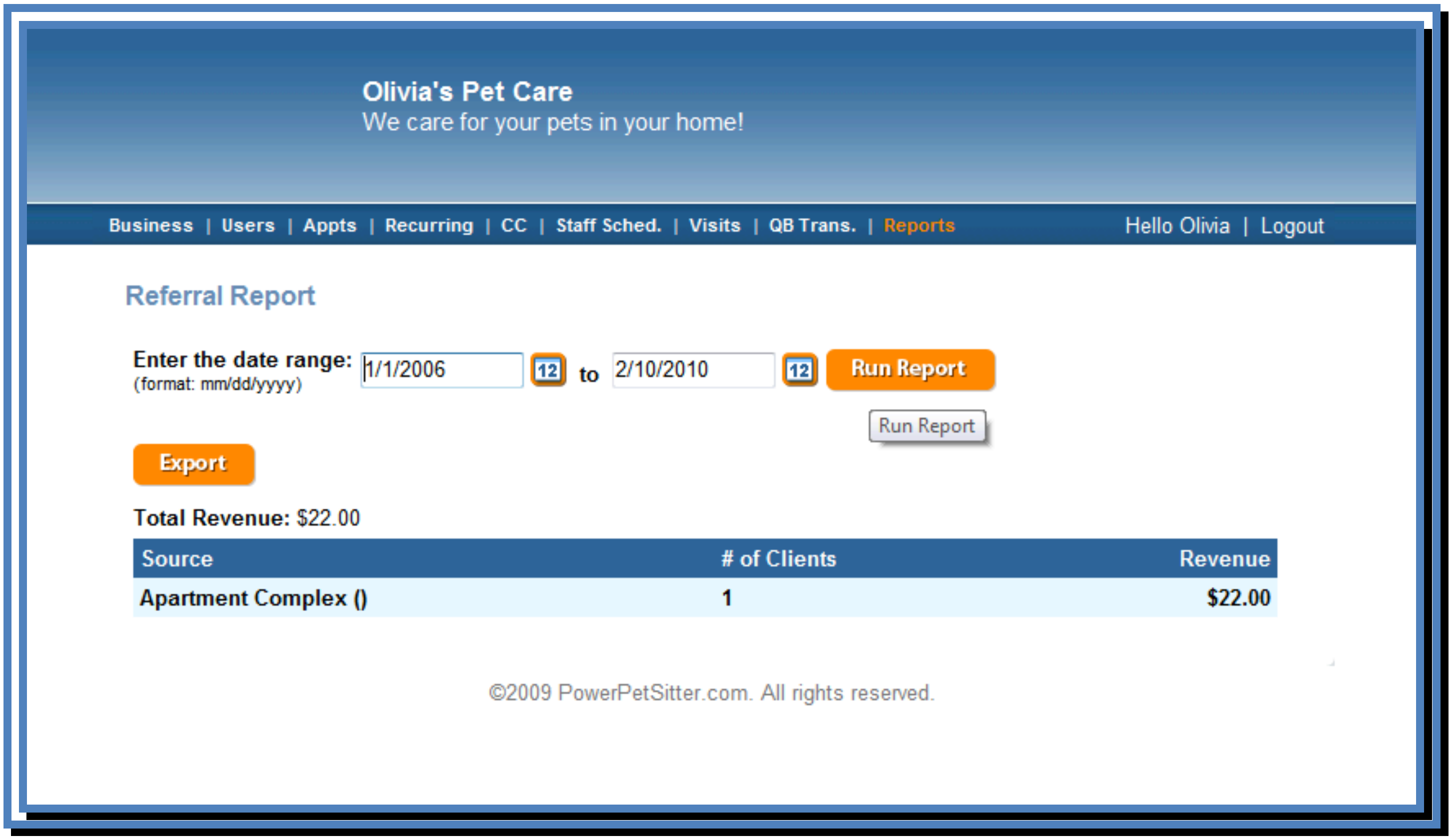
Business | Users | Appts | Recurring | CC | Staff Sched. | Visits | QB Trans. | Reports   Hello Olivia | Logout

Clients By Veterinarian

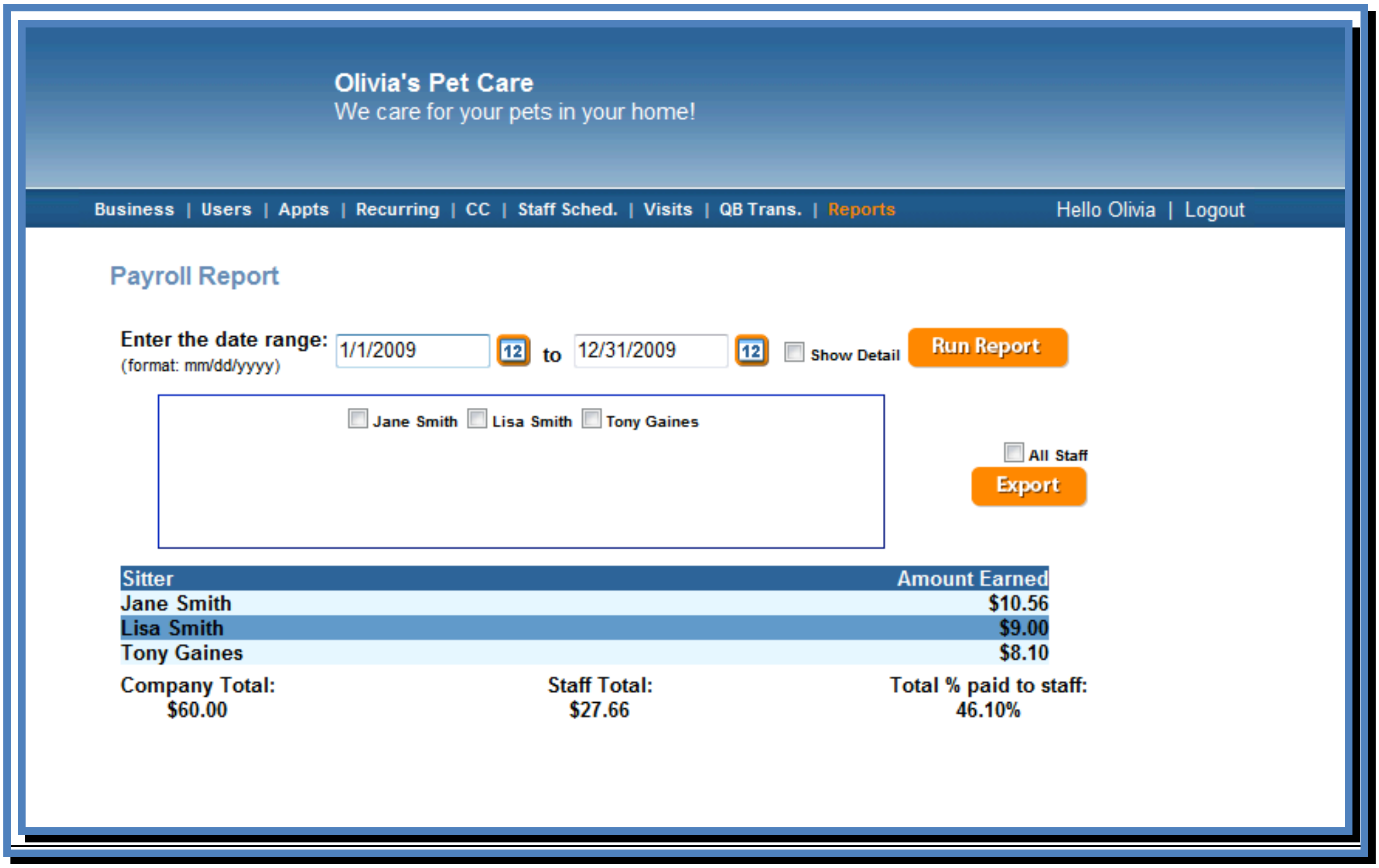
Veterinarian	Client	Pet	Type
Animal Clinic	Alex Fontaine	Bonkers	Dog
		Mitzi	Dog
	David Hillman	Curly	Dog
		Moe	Dog
Dr Seus	Alex Fontaine	Sparky	Dog
Tree House	Hillary Johnson	Bashful	Cat
		Happy	Cat
		Sleepy	Cat
	Kristen McCray	Moon	Cat
		Star	Dog
	Mia Rowen	Cupcake	Dog

Client Report Engine – Use this engine to generate a list of clients based on the filter options you select. Check the search criteria you would like for your client list, and click the "Show Clients" button. A list of clients which meet the requirements of your filter will appear. From the generated list, check the clients that you would like to send an email to. To the right of the list, create an email to be sent to all of the selected clients. You can also export data from selected clients to an Excel spreadsheet by selecting the clients, and clicking the "Export" button. To print mailing labels, select the clients you wish to create a mailing label for, and click the "Labels" button. Be sure to review the "Read Me First" instructions for formatting to set the proper header, footer, and margins for printing. Use Avery 8160 label sheets for printing specifications.

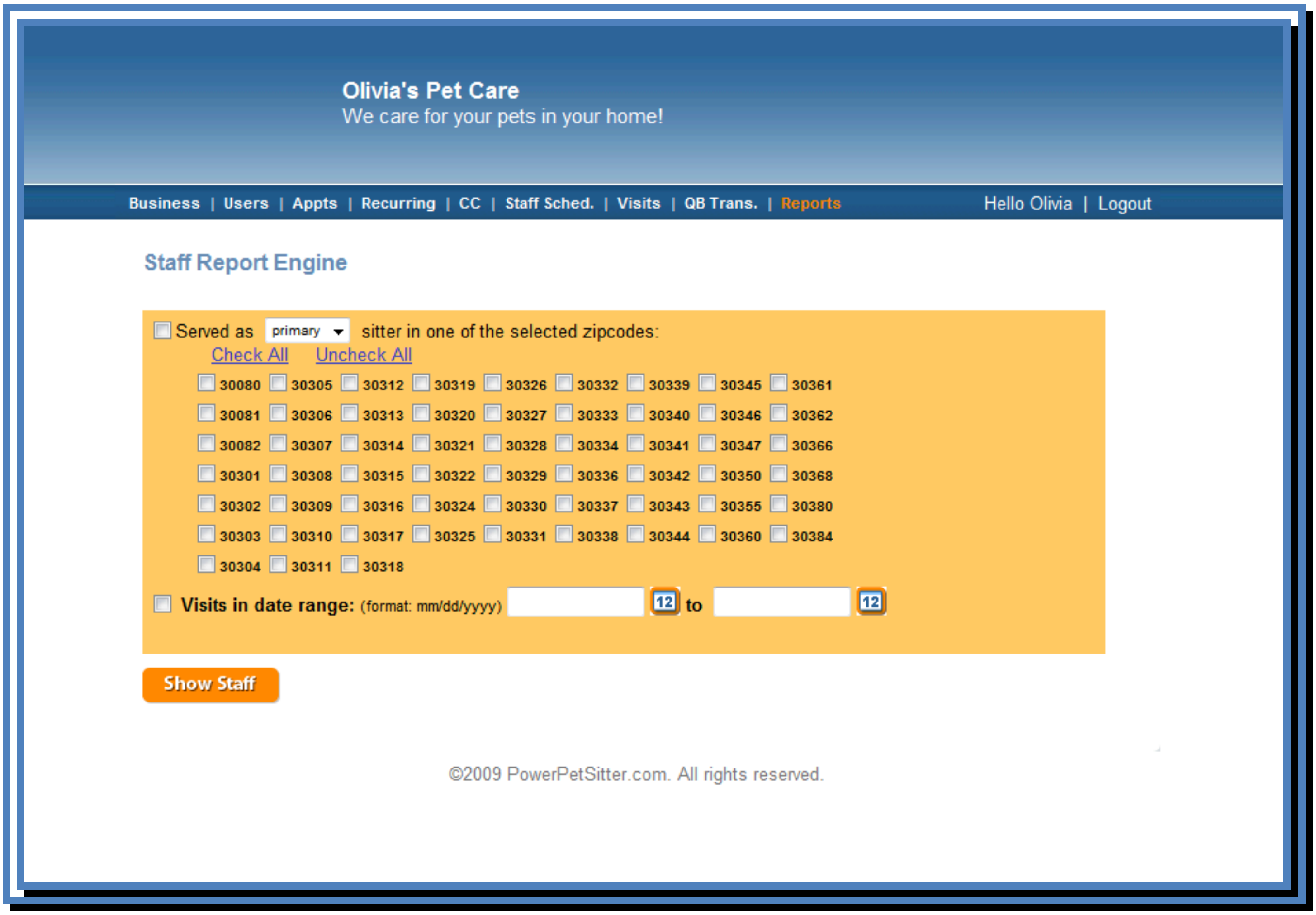
Referral Report - See revenue earned based on type of referral. Enter a time frame during which you would like to see generated revenue. Click the "Run Report" button and a list of revenue will appear based on the referral type. You will see the number of clients with the indicated referral type, and the revenue earned within the indicated date range.



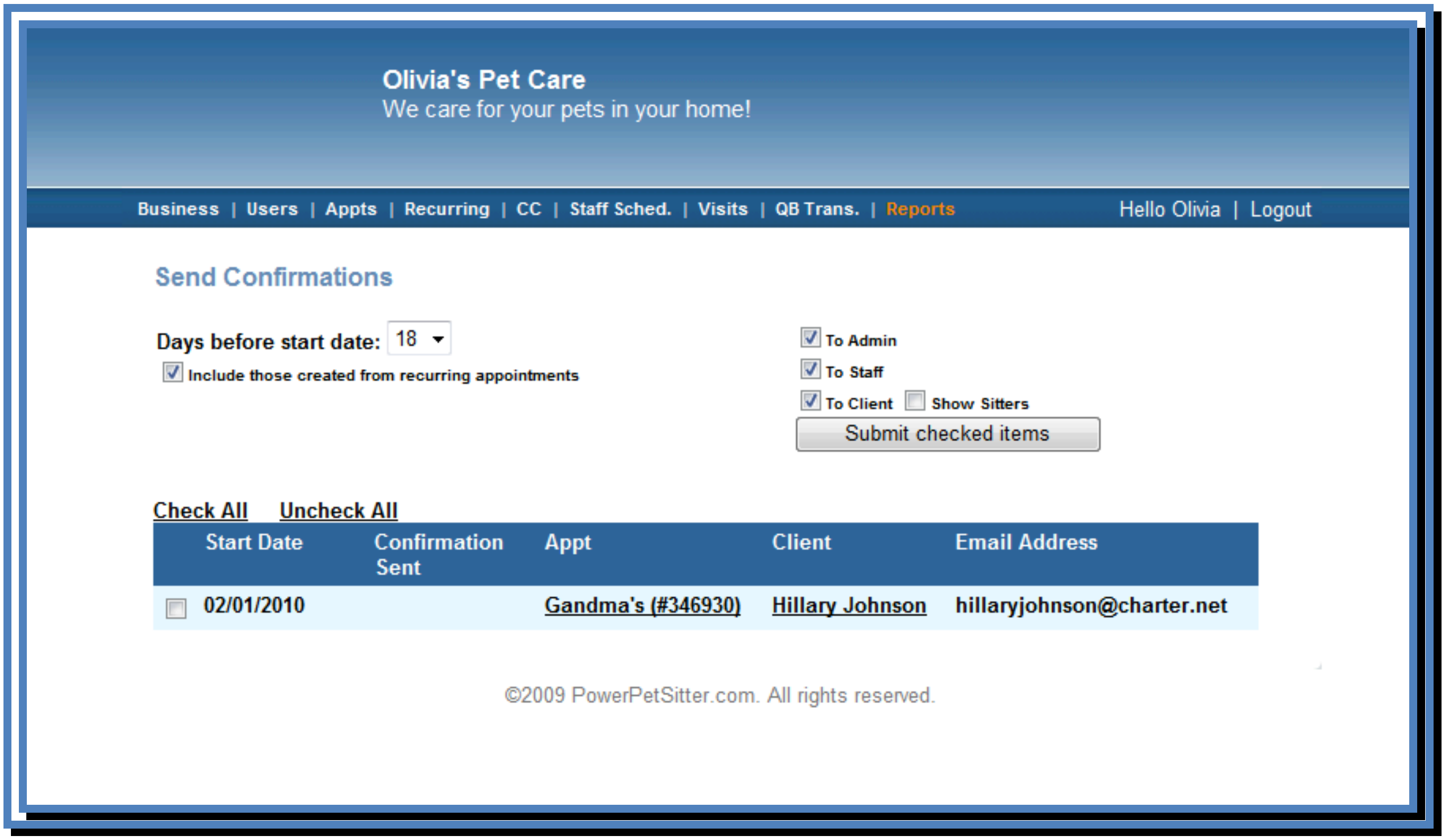
Payroll Report – Review the payroll amounts for each individual staff member. Enter the date range of the report you wish to generate. Click the "Run Report" button, and a list of your sitters who have earned money within the time period will generate. The amount earned by each staff will appear beside their name. You may also select to see a detailed description of the visits completed by checking the "Show Detail" box. You can export data for the staff by selecting their name from the box of staff names. Click the "Export" button to send the information to an Excel spreadsheet.



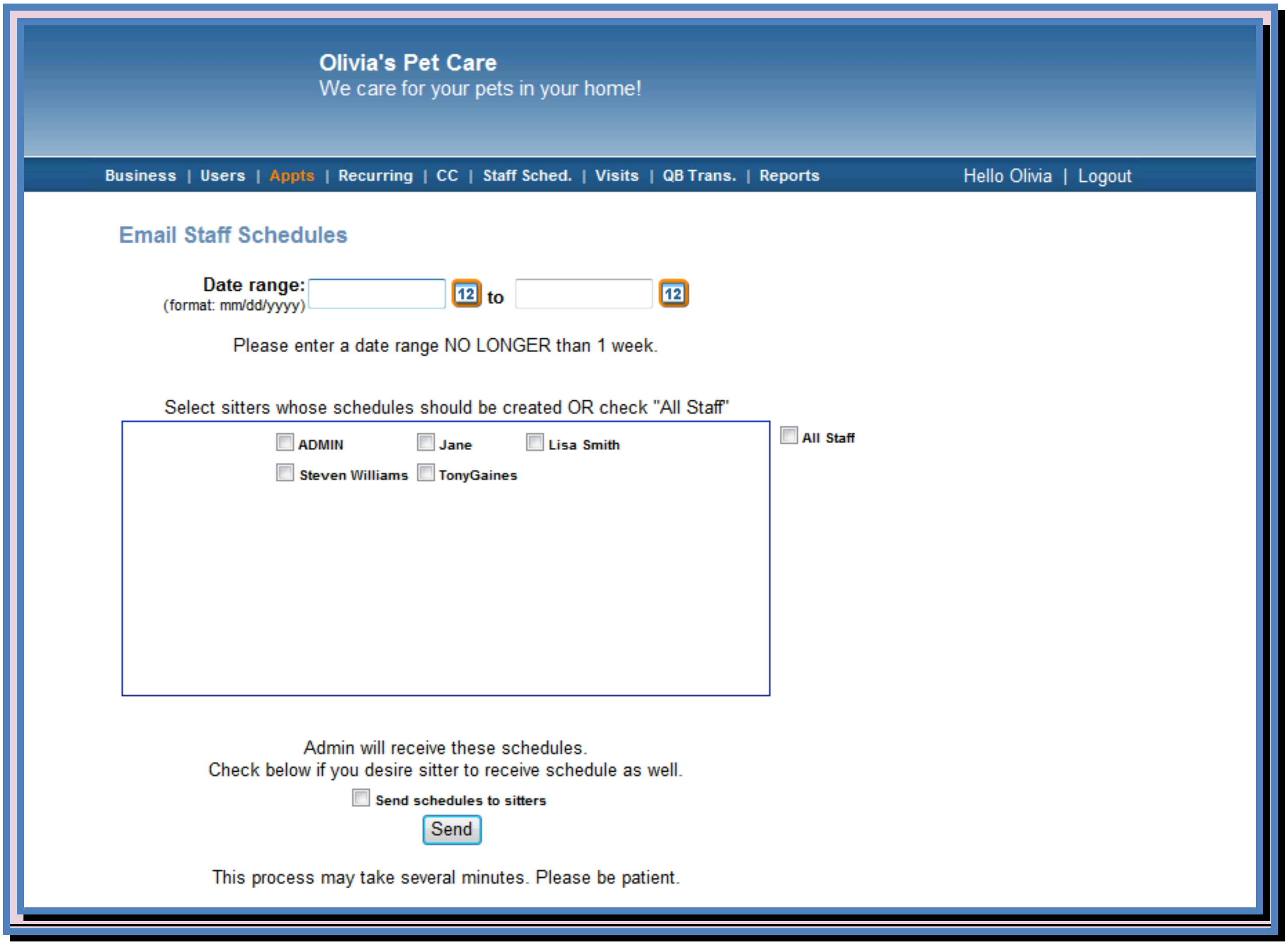
Staff Report Engine – Use this engine to generate a list of staff based on the filter options you select. Mark the search criteria you would like for your staff list, and click the "Show Staff" button. A list of staff which meets the requirements of your filter will appear. From the generated list, check the staff that you would like to send an email to. To the right of the list, create an email to be sent to all of the selected staff. You can also export data from selected staff to an Excel spreadsheet by selecting the staff, and clicking the "Export" button. To print mailing labels, select the staff you wish to create a mailing label for, and click the "Labels" button. Be sure to review the "Read Me First" instructions for formatting to set the proper header, footer, and margins for printing. Use Avery 8160 label sheets for printing specifications.



Appointment Confirmations – Review and send appointment confirmations for upcoming visits. Select the number of days before the start date of the appointment to generate a list of appointments for that time period. Mark the appointments you would like to send a confirmation for. At the top of the screen, select who you would like to send the confirmation to and click the "Submit checked items" button.



<u>Email Schedules</u> – Email staff schedules to the Admin users for an upcoming time period. Indicate a date range no longer than a week. Select the sitters whose schedules should be emailed, or check the "All Staff" box. If you would like the sitters to also receive the emails, check the "Send schedules to sitters" box. When ready to send the schedules, click the "Send" button.



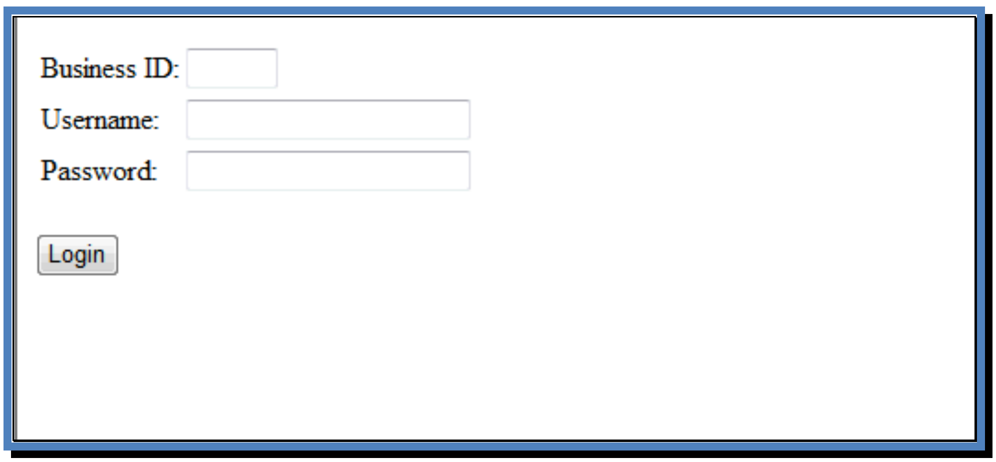
Power Pet Sitter on the Go

Power Pet Sitter may be accessed from a mobile device.

From the mobile application you can:

- ✓ Access schedules
- ✓ Access client address and phone information and instructions
- ✓ Mark visits completed

Go to www.powerpetsitter.net/m



Your business ID is your company's number which is located at the end of your URL:

https://www.powerpetsitter.net/login.aspx?bid= ***THREE DIGIT NUMBER***

Your Username & Password are the user name and password you use to access your account from your computer.