The Time To Pet Facility Onboarding Guide

A step-by-step guide to help you successfully launch the Facility software!

TimeToPet
Modern Pet Sitting Software

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Welcome to Time To Pet Facility!

Thanks for joining Time To Pet - We're so happy you're here! We're sure you have a lot of questions about where to start. This guide was created to serve as a resource for you as you onboard, but we also wanted to answer some common questions we receive from our new customers, such as, "How can I import my client data?" and "When should I launch to my clients?".

Using this guide, you'll learn some of the most important features to focus on when setting up, how to get ready to launch to your clients, and some valuable tips and tricks from our team. At Time To Pet, we've worked with many customers on different journeys of their facility pet care business. 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 Facility as easy as possible.

We recommend completing these steps in phases. Take a few minutes to review the steps below and decide on a timeline that works for your business. You can always adjust this as you move through the process!

Transitioning from another software? Please review the section in this guide on **Switching From Another Software** first.

This guide includes a worksheet that you can fill out to help you plan, implement, and refer back to throughout the process.

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)

🐾 **FAQ's:** Frequently asked questions (the paws icon)

General Implementation Plan Outline

This implementation plan outline can be used to help plan your company's implementation timeline. 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:

- [ ] Create your Main and Add-On Services, as well as your Spaces.
- [ ] 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 Client App.
- [ ] Approve Pending Requests from test clients onto the Scheduler.
- [ ] Create Templates for recurring clients.

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 Agreements section of your Client Settings.
- [ ] Configure your Pet Parent Onboarding steps in your Portal Settings.
- [ ] Configure your Staff Permissions found under Staff Settings.

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 "beta testers" 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 using the Client Portal and App. We also have help documentation in our Knowledge Base that you can send them.
- [ ] Add staff members and have them activate their accounts.

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 (included below in thia guide) that will include an activation link for all of your clients and information on downloading the Mobile App.

Getting To Know Time To Pet Facility

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

🗝️ **Onboarding tip:** Much like learning anything new, implementing Facility for your business may have a learning curve, and sometimes the to-do list can feel a bit daunting. We promise that after familiarizing yourself with these steps, you'll understand how Facility works and how best to use it to grow your business, and it gets easier with practice!

💡 **Expert Tip:** Did you know 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 logged in to their portal. Need more help? Check out Logging Into Client Portal As The Client.

Any scheduled events or approved Service Requests are not automatically invoiced. This gives you the control to decide which services should be invoiced and on what invoice, which can be done in bulk or individually.

Invoices are not automatically sent to clients unless you have set up credit card processing AND the Automatic Charging feature is enabled. You can manually send invoices whenever you're ready and have complete control over Invoice Dates and Invoice Due Dates that can be set in your Invoice Settings. We'll cover each of these a bit later. Learn more about invoicing in Facility, in our help article: Understanding Invoicing In Facility

Clients can download the Time To Pet App to access their Client App, where they can view and send messages to you and your team, request services, pay invoices, and update and upkeep their and their pet's information.

Phase 1: Getting Set Up in Facility

Before jumping into your new account, let's set up three important parts of Facility. First, add a client; then, create your Main and Add-On Services; and lastly, schedule an event.

1. *Add A Test Client*
2. *Create Main and Add On Services*
3. *Create your Spaces*

Every great facility business needs clients! We strongly recommend creating a “test” client when you start with Facility. You can choose any name for this test client account, use your email address, and add your pets. Check out our help article for Adding A Client for more info.

Now, we'll be pretending you've been asked to schedule services for a client (later, we'll show you how to approve requests for services that a client has requested.) Let's get started!

- **Test Exercise:** Schedule An Event for a client

Clients use the Client Portal and Appl 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 "Login As Client" to log in as your test client, bringing you into their Portal. Then, click on the “Schedule” link at the top of the page. If you need more instruction, we have more information in our help article here: 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 use the services you requested as part of the next test exercises.

- **Test Exercise:** Schedule an evnet as a test client in the Client App

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

- **Test Exercise:** 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, significantly reducing the number of emails and phone calls you have to handle.
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 anytime if you’re not ready to decide just yet!

- **Test Exercise:** Visit your Invoice Dates and Settings to view the different options and configure them if you’re ready.

If Credit Card Processing is set up in Facility, you can also enable Automatic Charging to charge your clients automatically. Automatic Charging allows you to set payments for your facility business on autopilot. Automatic Charging also improves cash flow with automatic retries and support for multiple payment options. This toolset is designed to help facility businesses get paid faster and easier.

⚙️ **Customer Support Tip:** Learn more about Automatic Charging here.

Bulk Invoicing allows you to manually perform specific 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.

⚙️ **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 without setting up Credit Card Processing and Automatic Charging. However, it is possible to have invoices automatically shown in a client's portal depending on your [Client Settings → Portal Settings](#), which we'll discuss here.

You can control how clients are viewing invoices in their Client Portal and App, in your [Settings - > Client Settings -> Portal Settings](#):

- **"Show Paid Invoices in Portal?"** - When enabled, clients can access their Paid invoices in the client portal. If payments and tipping are enabled, clients can 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.

While **Show 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 All Unpaid Invoices:* Shows all unpaid invoices to clients.
- *Show Only Due Invoices:* Only invoices that are due today or in the past will be shown, as well as invoices that have been emailed to clients.
- *Show Only Emailed Invoices:* Only invoices that have been emailed through Time To Pet will be shown.
- *Never Show Unpaid Invoices:* Unpaid invoices will never be shown to the Client.

After learning how to schedule an individual event for a client, you might be wondering how to set up recurring schedules for clients. This where Templates come in handy!

What are Templates? Imagine you have a client with the same services scheduled week after week. Full day of daycare every Monday, Tuesday, Wednesday, Thursday, and Friday. Scheduling this client manually every week would be tedious and time-consuming.

With a Template, you can set up these services once and have them automatically (or with the click of an approve button) added to your schedule every week, and you never have to wonder, “Did I forget to schedule Fido’s daycare this week?”.

💡 **Expert Tip:** Do you need to edit events on a template you've 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:** Create a test template for a client. Then, edit it.

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

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

🗝️ **Onboarding Tip:** Need a little more help with client and fields? Check out our help article to learn more about creating these fields. Client and Pet Fields help article.

- **Test Exercise:** Set up Client and Pet Fields

The Client Agreement is a configurable set of terms that your clients must e-sign when accessing the Client Portal or Mobile App for the first time (otherwise known as your service agreement or contract). If you have a service agreement or contract created, you can copy and paste it into the text box. If the Agreement is enabled and text is added in the text box or an Agreement is uploaded, your customers will not be able to use the Client Portal until they agree and e-sign it by typing their name. By default, no Agreement 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 and global documents!)

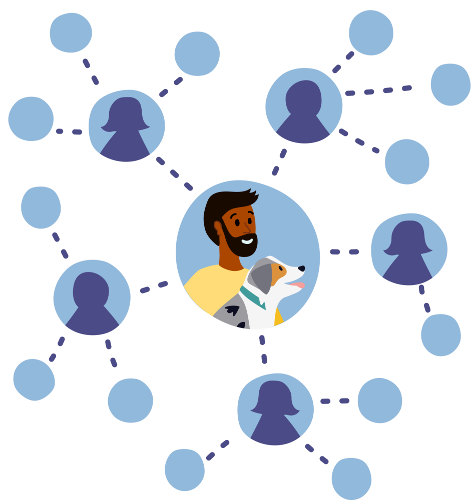
- **Test Exercise:** Review the Client Agreements and add your agreement(s) if you choose. The Pet Parent Onboarding tool lets you build a customized onboarding experience for your clients. This tool helps guide your new clients as they create their accounts and complete the information important to your business. When the options are enabled, new pet parents will be directed to complete all their information as they activate their account for the first time.

Pet Parent Onboarding can be configured in the Portal Settings section of your Time To Pet account.

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

Staff in your company can have one of four roles: *Trainee, Tech/Runner, Scheduler, and Admin*. The permissions of each of these roles can be customized even further using the Permissions settings in Facility. Specific permissions are core to a user role and cannot be disabled/enabled. An overview of staff permissions can be found here.

- **Test Exercise:** Review and adjust staff permissions



If you need to adjust a staff member's role, you can do so at any time by following these steps: How To Change A Staff Member's Role

FAQ: Can I add staff members later? Yes! If you want to add staff later, you can use these steps: Add A Staff Member.

Phase 3: Beta Test with Real Clients and Onboard Staff Members

Now that you've explored the software and learned scheduling, invoicing, and the Mobile App, you can start beta testing with a small group of actual 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 "beta" 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.

When adding your staff members to your Facility account, an automatic activation email will be sent to them. This email includes a link allowing them to create a new password to access their Staff Dashboard. You can read more about activating staff accounts here: Activating A Staff Account.

Staff members can explore their Dashboard, which includes access to their scheduler, clock-in and out times, and Time Off. Your staff members will only have access to specific features, client and pet information, contingent on their role.

Phase 4: Launch!

Now is a good time to ensure all your Settings match your business and use real clients to test events and gather feedback.

- **Confirm that your Settings:** Custom Messaging, Custom Client and Pet Fields, and Client Agreement(s) look good and match your business.
- Configure Client Portal Tag and New Client Account links and add them to your website if desired.
- 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 using the template (included below) for clients to activate.

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 service and pay invoices anytime.

Onboarding Tip: A client portal tag is a unique address displaying your theme settings and branding when clicked.

1. First, you must create your Client Portal Tag in your Portal Settings.
2. Next, we have included instructions from several major website builders on adding an external link to your website here.

Time To Pet also allows you to add a link to your website to allow New Clients to create accounts directly on Time To Pet Facility. We have a help article outlining the steps to allow new clients to create accounts here.

Onboarding Tip: See our help article on Best Practices For The New Client Form for more ideas on configuring your 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. In case you weren't aware, you can send mass emails 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

Here is the template:

"We are very excited to announce that COMPANY NAME is implementing new software to improve your experience as you use our services! The new software is Time To Pet Facility, and all 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, and 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 follow the below steps:

1. Enter your email address.
2. Then click "Send Activation Email".
3. You will receive an email with a link to activate your account.

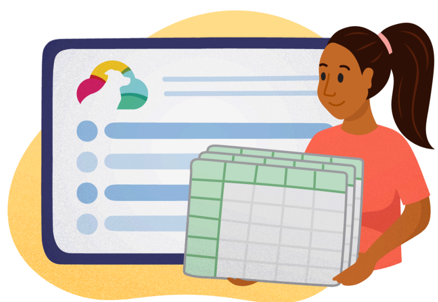
After logging in for the first time, please take a moment to review all of the information in the "Pets" and "My Info" sections. If any information needs to be updated, please take a moment to update the info as well. If you have any questions about using the Portal, you can visit the Help Section (https://facility.helpscoutdocs.com/category/459-client-portal-app) or contact us directly.

You can also download the Time To Pet app and login using your existing client portal login credentials.

In the app - you can update your information, view and send messages, request services, and more. The app also supports push notifications if you want to receive notifications when we send you a new message.

The app can be downloaded right from the Apple App Store (https://itunes.apple.com/us/app/time-to-pet/id957456517?mt=8) or from the Google Play Store (https://play.google.com/store/apps/details?id=com.sweetss.timetopet&hl=en). You can also search for "Time To Pet" in your App Store.

Thank you again!"



What If I'm Switching From Another Software?

We understand there is much to consider when switching facility-based pet care softwares. Change is hard, and it can seem overwhelming to start all over. Don't worry - we're here to help ensure your transition is smooth!

Here are a few things to keep in mind:

1. You'll want to contact us at support@timetopet.com to import your data. Your clients will **not** receive the Client Welcome Email when we import them into your account automatically, so you'll want to use the Mass Welcome Email template provided above to send this to them when you're ready to launch.

2. Unfortunately, we cannot import services, reporting data, client schedules, and credit card info, so you must manually add this for your clients. We recommend using Templates to set up your recurring client schedules first.

3. Clients will not automatically receive emails if you add scheduled events and generate invoices. You can read more about their notifications in When Time To Pet Emails My Clients. If you prefer

to disable all company notifications before launching, you can temporarily do so in your Settings > Advanced > Notifications.

4. Sometimes, it helps to do a "soft launch" of Time To Pet Facility to your clients before launching full-time. This can help ease the transition from your previous software if you still need to use it while moving over your client scheduling. You can send clients a welcome email so they can activate their accounts, explore the Portal and App, ask you questions, and relay any feedback. This will help prepare you for the final phase of moving completely away from your old software and using Time To Pet full-time.

What's Next?

We recommend checking out the following resources we have. You will also find many advanced features throughout our **Knowledge Base**. If you need more help with something, please feel free to reach out to us at support@timetopet.com, or visit our Contact Us Page. We're always here to help!