# The Time To Pet Onboarding Guide



A step-by-step guide to help you successfully launch the Time To Pet software!



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#### Welcome to Time To Pet!

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?" "What can I do on the Mobile App?" 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, what to do 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 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.

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 throughout the process!

Transitioning from another software? Please review the section in this guide on **Switching From Another Software** first. We also have a short video available to view on the process of transitioning to Time To Pet from another software and launching to your clients:

<u>Transitioning To Time To Pet - Video</u>.

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

# **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:

- 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 <u>timetopet.com</u> 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 Agreements section of your Client Settings.
- Configure your Pet Parent Onboarding steps in your Portal 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 "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 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)



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

# 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, adding a client, then, creating a service, and lastly, 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 and add your pets.

We've put together a <u>short video</u> showing you how to create your first client. Check out our help article for <u>Adding A Client</u> 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: Much like with learning anything new,, there may be a bit of a learning curve with implementing Time To Pet for your business, and sometimes the to-do list can feel a bit 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!

**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 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 you 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.

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 <u>timetopet.com</u> on the mobile browser of your device.

Whenever you are <u>Scheduling An Event</u> for your client, you are also creating the invoice for them at the same time. Here is our help article on <u>Understanding Invoicing In Time To Pet</u> 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: 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 "Login As Client" to log in as your test client, which will bring you into 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: Scheduling an event on 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 <u>Scheduler</u> -> "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: Approve <u>Pending Requests</u> as an admin onto the Schedule



**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 <u>Schedule Blocks</u> come in. Schedule blocks allow you to specify predefined 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 <u>Best Practices on</u> 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: Visit your <u>Schedule Blocks</u> 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 <u>Invoice Settings</u>. 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: Visit your <u>Invoice Dates and Settings</u> to view the different options, and configure them if you're ready.

Automatic Charging allows you to set payments for your pet care business on autopilot. Automatic Charging also improves cash flow with automatic retries and support for multiple payment options. This toolset is designed to help pet care businesses get paid faster and easier. If you have <u>Credit Card Processing</u> set up in Time To Pet, you can also enable Automatic Charging to charge your clients automatically.



#### Customer Support Tip: Learn more about <u>Automatic Charging</u> here

Bulk Invoicing allows you to manually 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 and Automatic Charging 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 the 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 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.

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 and we'll review them below.

**Expert Tip:** 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 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
- Never Show Unpaid Invoices: Unpaid invoices will never be shown to Client.

**Expert Tip:** This short video reviews payments, credits, and open payments and how they work in Time To Pet: <u>Understanding Payments</u>, <u>Credits</u>, <u>and Open Payments in Time</u> To Pet

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.

Onboarding Tip: Time To Pet also offers Time Tracking & Mileage Tracking for staff members to clock in and out of their shifts as well as record their odometer at the start and end of their shifts. For more information on how Time Tracking & Mileage Tracking works in Time To Pet, see <u>Time Tracking & Mileage Tracking</u>.

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

Test Exercise: Configure your <u>Mobile App</u> settings and run a few events on the App.
 Send post-visit reports and <u>Visit Report Cards</u>.

**Customer Support Tip:** Need a little more help with Visit Report Cards? We have a video here. We also have a help article on <u>Best Practices for Visit Report Cards</u>.

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.

Customer Support Tip: Need a little more help with Templates? Check out our video here on how templates work, and how to set them up.

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, invoices are automatically generated, and you never have to wonder, "Did I forget to schedule John Doe's walks this week?"

**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: Create a test template for a client with recurring 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: 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 <u>Best</u>

<u>Practices</u> article to learn more about how you can effectively customize your information fields to match your business.

Test Exercise: Set up Client FieldsTest Exercise: Set up Pet Fields

The <u>Client Agreement</u> 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 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 <u>documents</u> 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: Review the Client Agreements and add your own agreement(s) if you choose

The <u>Pet Parent Onboarding</u> 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 that is important to your business. When the options are enabled, new pet parents will be directed to complete all of their information as they are activating their account for the very first time.

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

**Expert Tip:** Time To Pet supports Gift Cards that your clients can purchase towards future services with your company. Click to learn more about our <u>Gift Cards feature</u>.

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 <u>Permissions</u> settings in Time To Pet. Certain permissions are core to a user role and cannot be disabled/enabled. An <u>overview of staff permissions can be found here.</u>

• Test Exercise: 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 any time should you want to change the value. Here's the full help article on <u>Staff Notifications</u> and how to adjust them.

You are also able to customize which notifications staff receives in Settings -> <u>Advanced</u> <u>Settings -> Bulk Notification Editor.</u>

**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: 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: How To Change A Staff Member's Role

FAQ: Can I add staff members later? Yes! If you want to add staff at a later time you can by 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: <u>Time To Pet Billing</u> & <u>Pricing</u>

# 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: Need a little more guidance on the best way to onboard your clients? Check out our help article on <u>Best Practices For Onboarding Clients To Time To Pet</u>.

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 <u>here</u>.

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

When adding your staff members into your Time To Pet account, an automatic activation email will be sent out to them. This email includes a link that will allow 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, their pay, and the Time Off or Time Available calendar. Your staff members will only have access to specific clients and their information if they have been scheduled with them or are marked a preferred sitter. Depending on the <u>Staff Permissions</u> you've set, they may only see events they are assigned to on the schedule.

Because the staff activation email cannot be customized, we recommend sending out a bulk email to your staff members explaining how to get started with their new Time To Pet account. You can use the template below to create an Email Campaign in Messages:

"Hi Team,

We will be launching our new software Time To Pet soon. To get ready, please go to your phone's app store and search for "Time To Pet" and download the Mobile App.

Or, if needed, here are the direct links to download the app:

- Time To Pet app in the Google Play Store
- Time To Pet app in the Apple App Store

Your username is your email address, and your password is the one you set up when you activate your account.

The mobile Time To Pet app will be used to complete events for clients and send them updates. You can read more about how to complete an event using the Mobile App in Time To Pet's help section here: <u>Using Time To Pet As Staff</u>

Please take some time to explore your Dashboard and the Mobile App. You'll be able to see your schedule, send messages to clients and the admin team, and submit your time off/availability. Thank you and let us know if you have any questions!"

#### 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 Client Agreement(s) 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, 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 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.

- 1. First, you'll need to set your Client Portal Tag in your Portal Settings.
- 2. Next, we have included instructions from several major website builders on how to add an external link to your website <a href="here">here</a>.

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 <a href="https://www.timetopet.com/portal/activate">https://www.timetopet.com/portal/activate</a> 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 (Client Portal Help) or you can 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 much more. The app also supports push notifications if you'd like to receive notifications when we've sent you a new message.

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

And you can also access the Client Application help documentation right here: <u>Client Application Help</u>

Thank you again!"

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



### What If I'm Switching From Another Software?

We understand that there is a lot to consider when switching pet sitting softwares. Change is hard, and it can seem overwhelming to start all over. Don't worry - we're here to help make sure your transition is smooth!

Onboarding Tip: We also have a short video available to view on the process of transitioning to Time To Pet from another software and launching to your clients: Transitioning To Time To Pet.

#### Here are a few things to keep in mind:

- You'll want to contact us at support@timetopet.com to import your data. This can be done when you activate or before you're ready to launch. 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 client schedules or credit card info, so you will need to manually add this for your clients. We recommend using <u>Templates</u> to set up your recurring client schedules first. You can also use the Trip Tool to save time with adding client schedules for services like pet sitting.
- 3. Clients will not automatically receive emails if you are adding scheduled events for them and generating invoices. You can read more about the notifications they receive in <u>When Time To Pet Emails My Clients</u>. If you prefer to disable all company notifications before launching, including notifications to staff members, you can configure this setting in <u>Advanced > Notifications</u>.
- 4. Sometimes it helps to do a "soft launch" of Time To Pet to your clients before launching full time. This can help ease the transition from your previous software if you are still needing to use it while moving over your scheduling and invoice data for clients. You can send clients a welcome email so they can activate their accounts, explore the Portal and App, and 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?

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 <a href="mailto:support@timetopet.com">support@timetopet.com</a>, or visit our <a href="mailto:contact\_Us Page">Contact\_Us Page</a>. We're here to help!

#### **Additional Resources**

- Onboarding Video Series
- Best Practices For Onboarding Clients To Time To Pet
- Resource Center
- Time To Pet Knowledge Base
- <u>Time To Pet Academy</u>
- <u>Time To Pet Blog</u>