

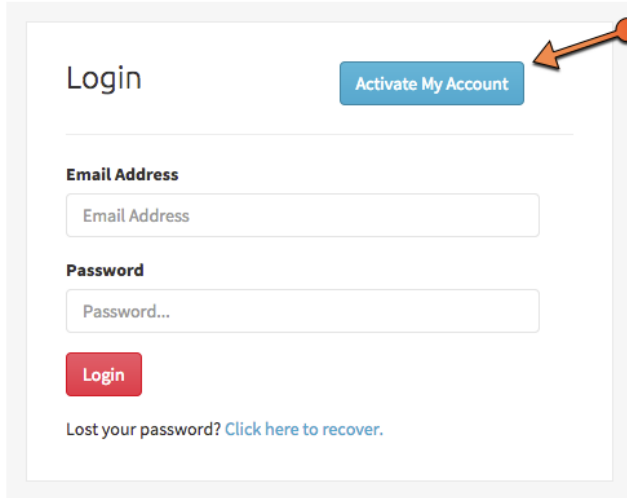


Client Portal Guide

Activating Your Account

If you have not received an email with instructions on how to activate your account you can easily do so yourself by following these instructions:

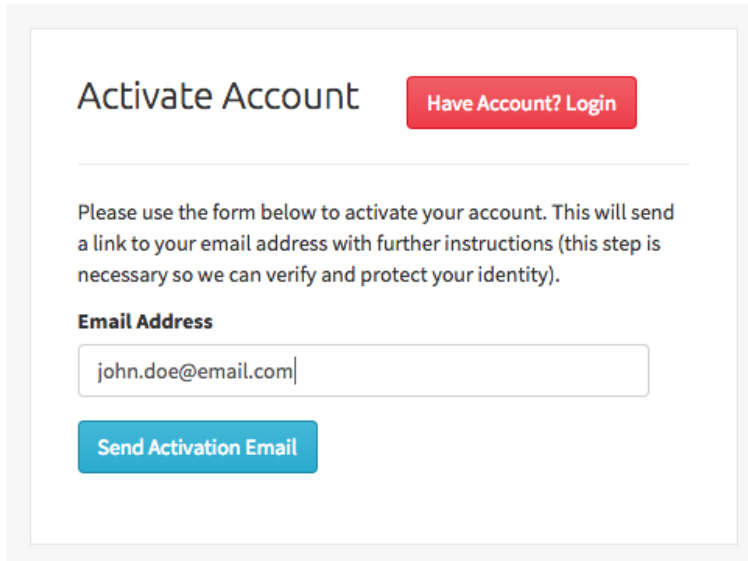
1. On Your Portal Login Screen Click The Activate Button.



The screenshot shows a login form with the following elements:

- Login** header
- Activate My Account** button (highlighted by an orange arrow)
- Email Address** label and input field containing "Email Address"
- Password** label and input field containing "Password..."
- Login** button
- Link: [Lost your password? Click here to recover.](#)

2. Enter your email address and click submit.



The screenshot shows the 'Activate Account' form with the following elements:

- Activate Account** header
- Have Account? Login** button
- Text: "Please use the form below to activate your account. This will send a link to your email address with further instructions (this step is necessary so we can verify and protect your identity)."
- Email Address** label and input field containing "john.doe@email.com"
- Send Activation Email** button

3. In order to verify your email address and account we will send you an email with instructions on how to complete the activation of your account. Open the email we sent and follow the instructions inside.

Using the Activity Feed

The Activity Feed allows you to communicate directly with us. Any messages you send us and all message we send you will also be sent via email so you will never have to worry about missing an update.

Send A New Message

To send us a new message simply click “Add A Message...” and start typing. When your message is ready to be sent you can click the “Add Message” button.

You can optionally attach any number of attachments with each message. To send an attachment click the “Attachment” link next to the Add Message button.

Kyle's Pet Sitting [ACTIVITY FEED](#) [PETS](#) [SCHEDULE](#) [MY INFO](#) [INVOICES](#)


Your Activity Feed

Thank you very much for the update James!

[Add Message](#) [Attachment](#)

James Turner 5 hours ago
May 22, 2015 9:52 AM

Fido was great on his walk today. He was very energetic and playful.



Your Pets

Using the Pets page you can keep your current pet's information up to date as well as informing us of any new pets.

Add A New Pet

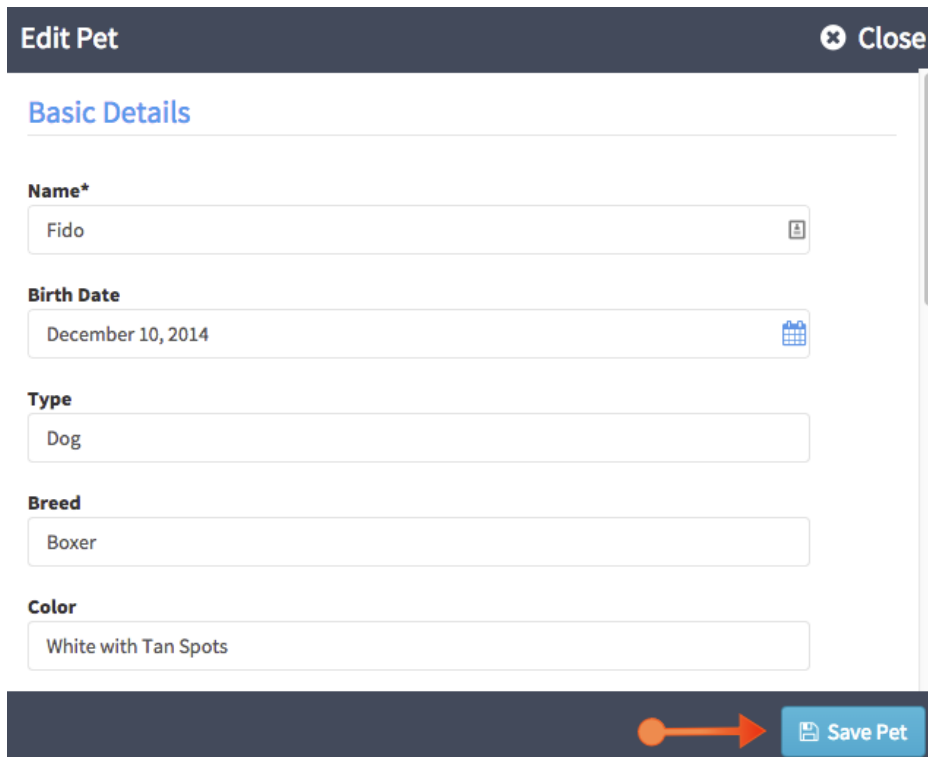
To add a new pet click the "New Pet" button.

Your Pets



Using the new screen fill out as many details about your pet that you can. Optionally you can also attach a picture to help us better identify your pet.

When done adding your pet's details click the "Save Pet" button in the bottom right corner.

A screenshot of the 'Edit Pet' form. The form has a dark blue header with 'Edit Pet' and a 'Close' button. Below the header, there is a section titled 'Basic Details'. The form contains five input fields: 'Name*' with the value 'Fido', 'Birth Date' with the value 'December 10, 2014', 'Type' with the value 'Dog', 'Breed' with the value 'Boxer', and 'Color' with the value 'White with Tan Spots'. At the bottom right of the form, there is a blue button labeled 'Save Pet' with an orange arrow pointing to it from the left.


Update Pet's Details

The more up to date your pet's details are, the better service we can provide. To edit your pet's information click the Edit button for the pet's information you want to edit.

Your Pets

+ New Pet

Fido



Basic Details

Name Fido
Birth Date January 13, 2010
Type Dog
Breed Boxer
Color Brindle
Microchip # #39-00223
Sex Male
Neutered/Spayed
Vaccinations Current
Primary Vet All Animals Vet Hospital
123. Main St.
Austin, Texas
78705
contact@allanimals.com
512.123.4567
512.123.4568

[Edit Fido](#)

The same screen you use to add a new pet will appear. Update the appropriate information in here and then click the "Save Pet" button.

My Info

The “My Info” page allows you to keep your contact information up to date. To start click on the “My Info” link at the top of the page.

Use the fields on this page to update your appropriate information and when ready scroll down to the bottom and click the “Update Information” button to save your changes.

Kyle's Pet Sitting ACTIVITY FEED PETS SCHEDULE **MY INFO** INVOICES LOGOUT

PRIMARY CONTACT

Name*

Primary Phone

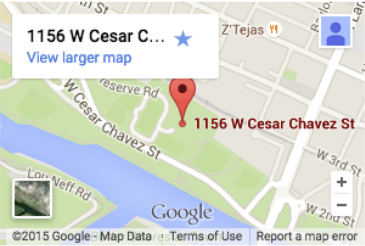
Secondary Phone

How did you find us?

ADDRESS

Access Instructions

Address 1



1156 W Cesar Chavez St
Austin, Texas
78703

512.123.9876
kylethielk+johndoe@gmail.com

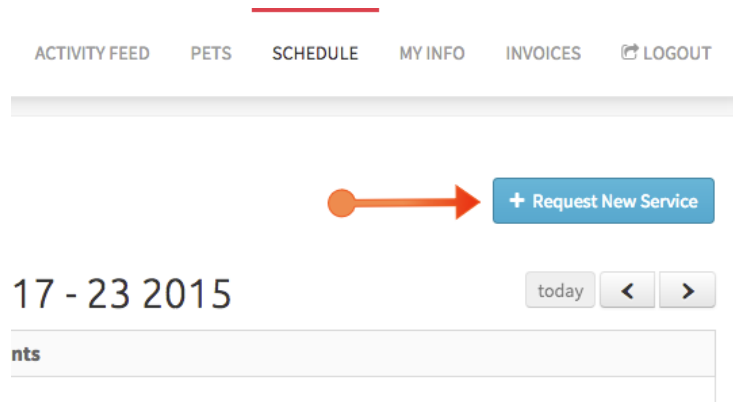
Your Documents

Requesting Services

You can use your Client Portal to send us service requests. To start click on the “Schedule” link at the top of the page.

Requesting New Services

Click the “Request New Service” button.



This form allows you to request single/one off visits.

Use the form below to request services. Please note that a requested service should not be considered final until approved by us. ✕ Close

Date Saturday May 23, 2015	Service Requested Dog Sitting - 30 Minutes	Notes Please feed both Fido and Tucker 1 Cup of Food.	
Time Afternoon	Pets <input checked="" type="checkbox"/> Fido <input checked="" type="checkbox"/> Tucker		

Fill out the Date, Time, Service, Pets and Notes sections. When ready click the “Add Request” button to send your request to us directly. **Services are pending until reviewed and approved by us.** We will send you an email confirmation when they have been reviewed and approved.

If you have made a mistake or want to remove a request you can do so by clicking the “Deleted Requested Service” link.

Use the form below to request services. Please note that a requested service should not be considered final until approved by us. ✕ Close

Date

[Request Repeat Services](#)

Time

Service Requested

Pets

 Fido Tucker

Notes

Please feed both Fido and Tucker 1 Cup of Food.

[+ Add Request](#)

Date Requested	Service	
May 23, 2015 (Afternoon)	Dog Sitting - 30 Minutes	✕ Delete Requested Service

If you need to request services over multiple days you can use the Repeat Services Screen. To start click the “Request Repeat Services” link.

Use the form below to request services. Please note that a requested

Date

[Request Repeat Services](#)

Time

Service Requested

Pets

 Fido Tucker

Using this form you can easily add multiple visits at once. Start by selecting the date range that you want to request services. Select the service, the pets and leave any notes. Finally select the times you want us on each day.

Use the form below to request services. Please note that a requested service should not be considered final until approved by us. ✕ Close

When Do You Want Services? <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">May 25, 2015</div> <div style="font-size: 0.8em;">to</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">May 28, 2015</div> </div>	What Service? <div style="border: 1px solid #ccc; padding: 2px 5px; display: flex; justify-content: space-between; align-items: center;"> Dog Sitting - 30 Minutes ▼ </div>
For Which Pets?* <input checked="" type="checkbox"/> Fido <input checked="" type="checkbox"/> Tucker	Any Extra Comments?* <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

May 25th

 Early Morning
 Morning
 Afternoon
 Evening

May 26th

 Early Morning
 Morning
 Afternoon
 Evening

May 27th

 Early Morning
 Morning
 Afternoon
 Evening

May 28th

 Early Morning
 Morning
 Afternoon
 Evening

+ Request Services

Date Requested	Service

When ready click the “Request Services” button to send us your request. **Services are pending until reviewed and approved by us.** We will send you an email confirmation when they have been reviewed and approved.

Invoices

The Invoices pages allows you to see any outstanding invoices for your account. To start click the “Invoices” link at the top of the page.

Kyle's Pet Sitting ACTIVITY FEED PETS SCHEDULE MY INFO **INVOICES** LOGOUT

Your Invoices

[Make A Payment](#) [Manage Cards](#)

Invoice #	Date	Total Due	Total Paid	Balance Due	Status
#000984 (Download)	May 19th, 2015	\$539.76	\$0.00	\$539.76	Draft
#000895 (Download)	April 4th, 2015	\$1134.49	\$0.00	\$1134.49	Past Due
#000470 (Download)	May 19th, 2015	\$1164.49	\$0.00	\$1164.49	Draft

Showing 1 to 3 of 3 entries Previous 1 Next

You can download any invoice by clicking the “Download” link.

Paying An Invoice

If credit card processing is enabled you can pay an invoice by clicking on the “Make A Payment” button. To select an invoice that you want to pay click on the row and enter the amount you want to pay (by default the total balance due is selected).

Pay?	Invoice #	Date	Balance Due	Amount To Pay	Tip
<input checked="" type="checkbox"/>	000003	October 11, 2015	\$24.99	\$ 24.99	Add Tip
<input type="checkbox"/>	000967	October 31, 2015	\$474.8	\$ 474.8	Add Tip

To Pay: **\$24.99**

[Proceed To Payment Details](#)

To add an optional tip click the “Add Tip” button. Use the drop down to select a pre-calculated percentage or to enter a custom amount select “Custom”.

Pay?	Invoice #	Date	Balance Due	Amount To Pay	Tip
<input checked="" type="checkbox"/>	000003	October 11, 2015	\$24.99	\$ 24.99	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> None - \$0.00 <input type="checkbox"/> 10% - \$2.50 <input type="checkbox"/> 15% - \$3.75 <input checked="" type="checkbox"/> 18% - \$4.50 <input type="checkbox"/> 20% - \$5.00 <input type="checkbox"/> Custom
<input type="checkbox"/>	000967	October 31, 2015	\$474.8	\$ 474.8	

To Pay: **\$24.99**

[Proceed To Payment Details](#)

When ready click the "Proceed To Payment Details" button.

You can then either use a saved card or enter a new card. Click the "Submit Payment" button to finalize and submit the payment.

- Card ending in 0027
- Card ending in 0017
- American Express ending in 0002
- Use New Card

Card Number *

Card Number

CVC *

123

Expiration Date *

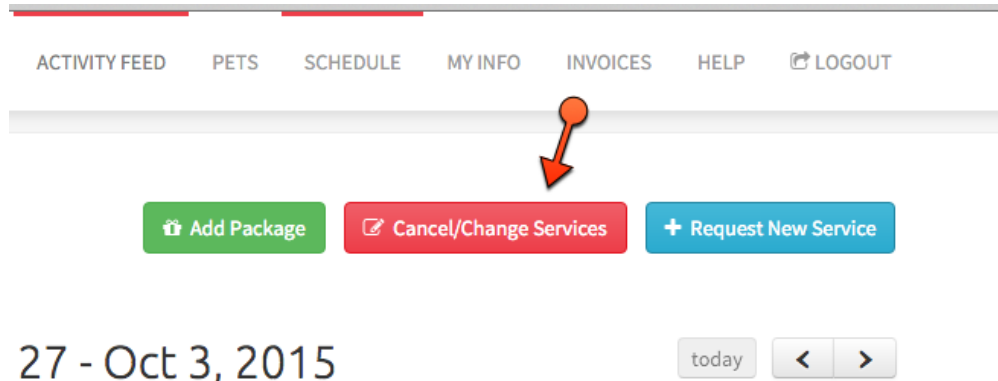
1 - January

2015

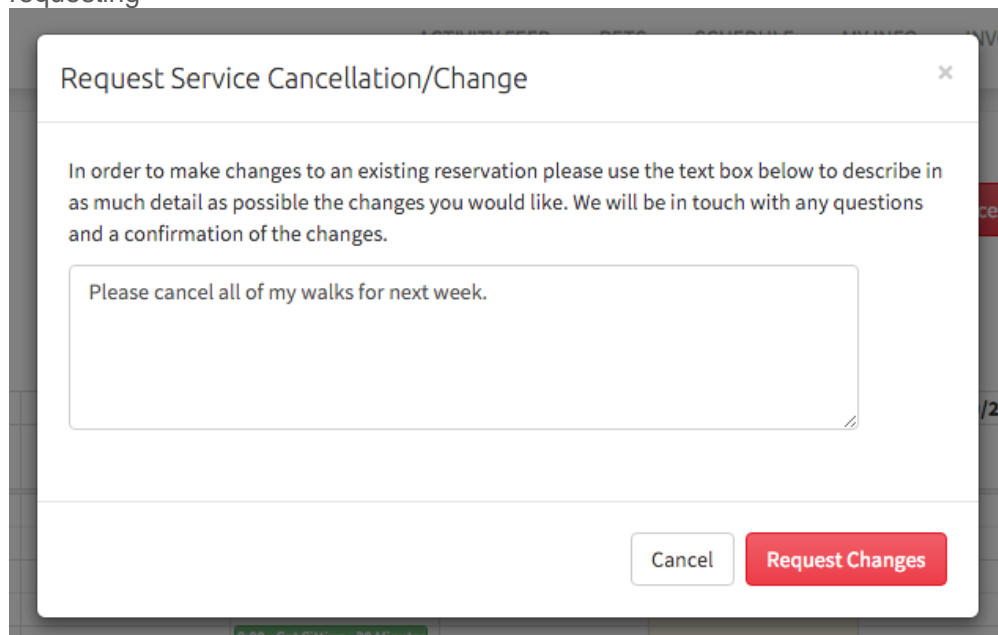
[Submit Payment of \\$1189.47](#)

Requesting Changes To Services

1. To request a change or cancellation for an already scheduled service visit your [Services](#) page.
2. Click the button labelled “Cancel/Change Services”



3. A new window will appear where you can send us a message about any changes you would like to request. Please leave as much detail as possible about the changes you are requesting



4. We will review your request, ask for any clarification if needed and get back in touch with you to confirm the requested changes. Changes/Cancellations should not be consider confirmed until you hear back from us with a confirmation.