Equine Business

What the Equine Business Owner Sees

Invoice Setup – 1st time

First you need to setup your company and payment terms within the app.

- 1. Go to the STALLPRO tabs
- 2. Tap on the Invoice Manager icon
- 3. Once on this page, tap the SETTINGS link in the top right corner.

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Printing	Sell a Horse	Stables/Livery
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Trainer	App Help	SUBSCRIPTIONS

Invoice Settings

Fill out this form with your company details

Payment Provider

• These are the payment services we support. Select your provider and enter your payment user handle. This is what get's sent to the customer for payment

Business Details

• These are your company details

Tap save settings to save your preferences

INVOICE SETTINGS Enter your payment provider and business details so that we can send invoices on your behalf. Select Service Venmo \sim **Enter Handle** usuallyourname Select Service (optional) PayPal ~ **Enter Handle** yourhandle Your Terms Due on Receipt \sim **BUSINESS DETAILS Business Name** Cedar Creek Farriers 2 Email patrick@equestrianapp.com

save settings

×

Create Invoice

This is your main invoicing screen with 3 action areas.

- 1. Create invoice button allow you to create a manual invoice
- 2. OPEN tab are your open or unpaid invoices
- 3. PAID tab are your invoices that customers have paid

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create in	voice
OPEN	PAID
\$200.00 Jennifer Husting You owe me Feb 4, 2022	Open 🗸
\$500.00 Jennifer Husting Leasing invoice for Fiona Jan 26, 2022	Open 🗸
\$333.00 Dillon Husting lesson invoice Jan 26, 2022	Open 🗸
\$55.00 John Dutton training invoice Jan 26, 2022	Open 🗸
\$55.00 A FRIEND bodywork invoice Jan 26, 2022	Open 🗸
\$100.00 A FRIEND	Open 🗸
home horses journa	contacts more

Create Manual Invoice

This screen allows you to create a quick invoice for your customers.

- 1. Select your customer
- 2. Select your terms
- 3. Enter your description of product or service
- 4. Enter your amount
- 5. Selecting a horse is optional
- 6. Select a category for the billing

When you tap send, an invoice is sent to the customer and they will receive a notification on their end of it.

Note: You can also create invoices off the business features boarding, bodywork, farrier, leasing, lessons and training when you create a journal session.

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canc	el	send invoice

OPEN Actions

The OPEN tab shows you invoices that are unpaid. The dropdown allows you to change the status of the invoice.

- Duplicate: creates a copy of the invoice for editing and then sending
- Open: Currently an unpaid invoice
- Paid: You can change the status if the customer has you directly
- Send Reminder: It will send an email and application notification again to your customers
- Remove: This will delete the invoice

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create invoice	
OPEN	PAID
\$200.00 Jennifer Husting	Open 🗸
You owe me Feb 4, 2022	Duplicate Open
\$500.00 Jennifer Husting Leasing invoice for Fiona Jan 26, 2022	Paid Send Reminde Remove
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\$55.00 John Dutton training invoice Jan 26, 2022	Open 🗸
\$55.00 A FRIEND bodywork invoice Jan 26, 2022	Open 🗸
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Customer

What the Customer Sees

Customer Notifications

The customer will receive an email notification and also when they log into the app, they will see a notification on their screen about a pending invoice.

3 types of notifications

- An Email Notification gets sent
- A app notification is available in app
- If configured, they will also receive a text notification to their phone

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Customer Invoices

Equestrians have an invoice feature too. In here are the invoices from their different equine business providers.

The second screen shows what they see.

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Connect Horse	Contacts	Discounts
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Q My Profile	((!)) Notifications	Patterns
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Printing	Record Books	Ride Tracker
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Customer Pays Invoice

The equestrians can pay within the app or they can pay you directly with cash or check too.

When they tap the PAY button, this dialog is shown with your online payment options.

They will go through that services payment process and pay your invoice. They are returned to the app to verify payment.

Once they verify payment, the equine business owner will receive a notification of payment. The transaction is completed

