

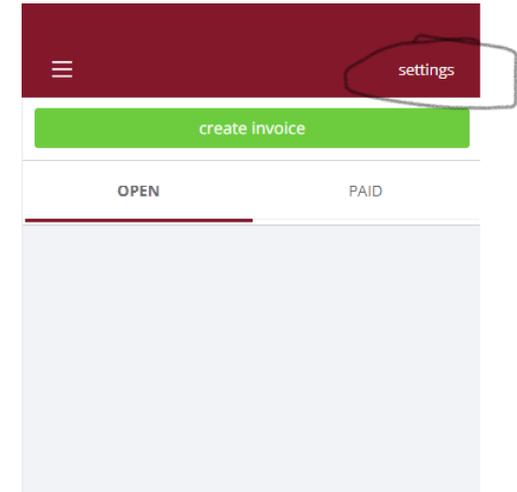
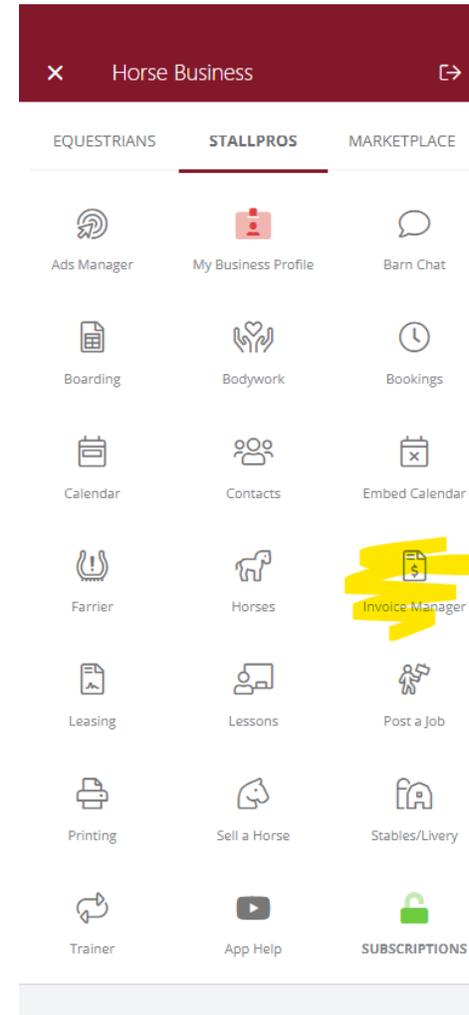
# Equine Business

What the Equine Business Owner Sees

# Invoice Setup – 1<sup>st</sup> 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.



# 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

× save settings

**INVOICE SETTINGS**  
Enter your payment provider and business details so that we can send invoices on your behalf.

**PAYMENT PROVIDER** ^

Select Service  
Venmo

Enter Handle  
usuallyourname

Select Service (optional)  
PayPal

Enter Handle  
yourhandle

Your Terms  
Due on Receipt

**BUSINESS DETAILS** ^

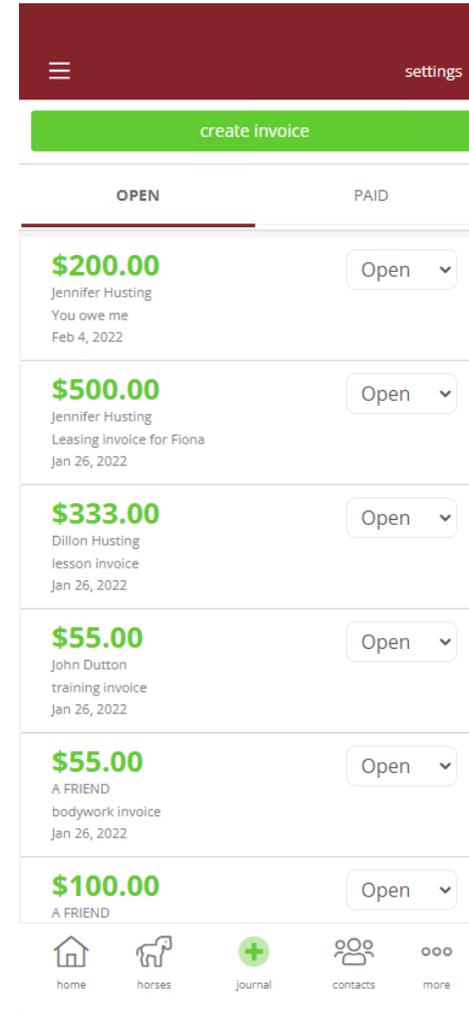
Business Name  
Cedar Creek Farriers 2

Email  
patrick@equestrianapp.com

# 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



# 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.

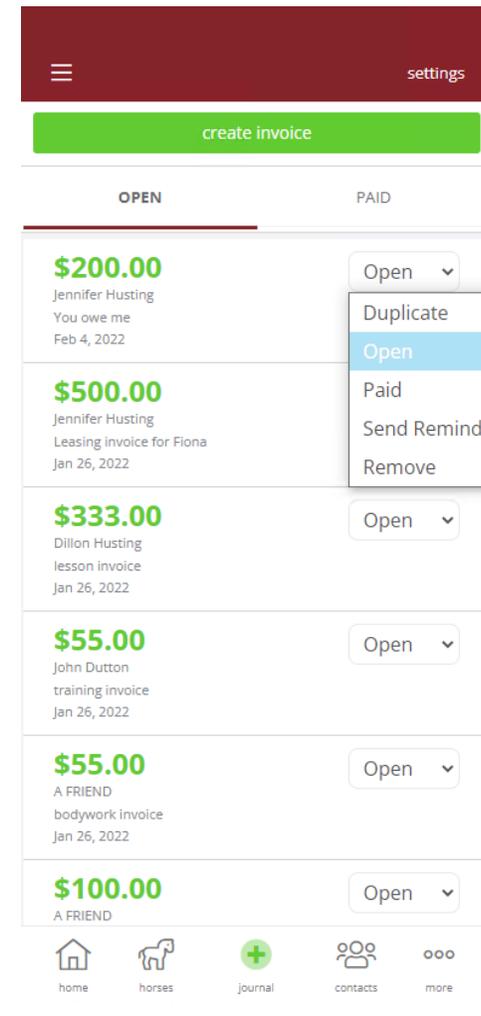
*Note: You can also create invoices off the business features boarding, bodywork, farrier, leasing, lessons and training when you create a journal session.*

The screenshot shows a mobile application interface for creating a manual invoice. The top header is dark red with a close button (X) on the left and a 'send invoice' button on the right. Below the header is a section titled 'Enter Invoice Details'. This section contains several form fields: 'Select Person to Invoice' with a dropdown menu showing 'A FRIEND'; 'Payment Terms' with a dropdown menu showing 'Payable on Receipt'; 'Product/Service' with a text input field containing '[enter services or products]'; a currency field showing '\$ 0.00'; a dropdown menu with a trash icon and 'SELECT'; another dropdown menu with a list icon and 'SELECT'; a date field showing 'Feb 25, 2022'; and a location field showing 'Redmond, Washington'. At the bottom, there are two buttons: a yellow 'cancel' button and a green 'send invoice' button.

# 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



# Customer

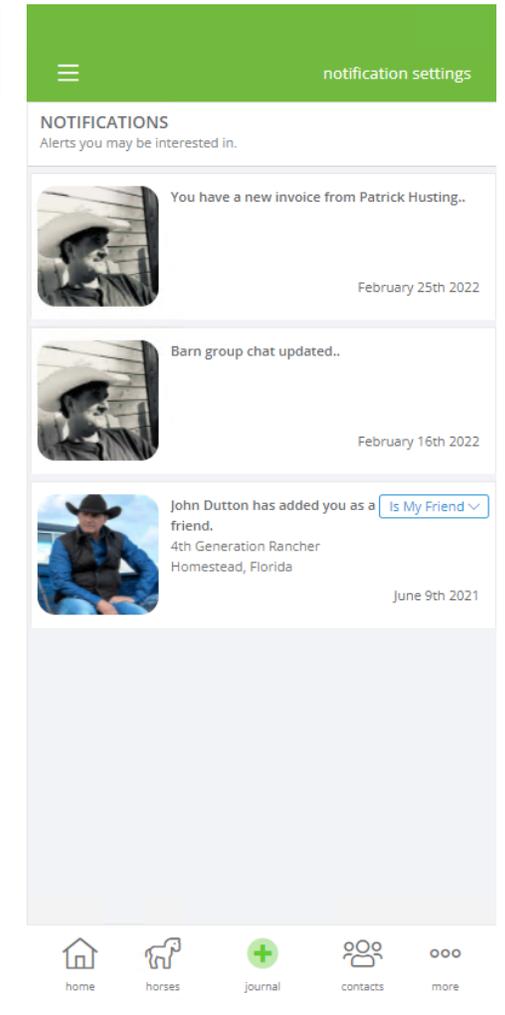
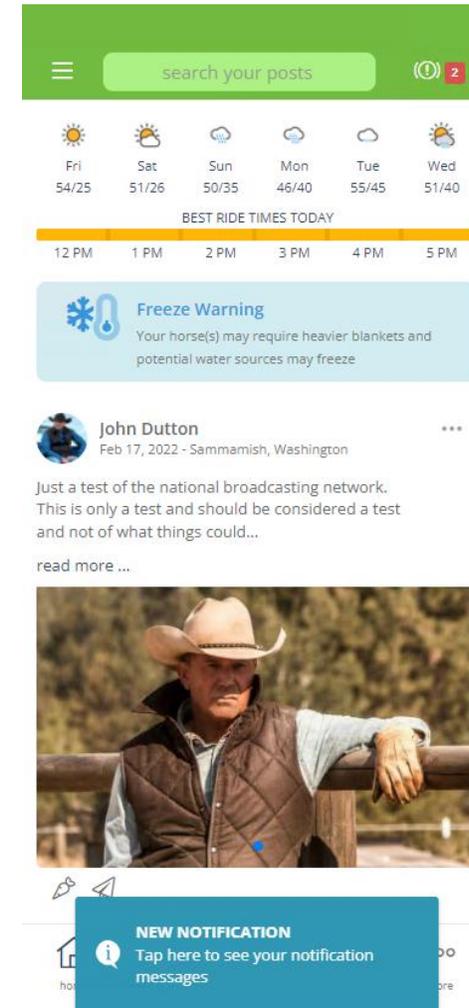
What the Customer Sees

# 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

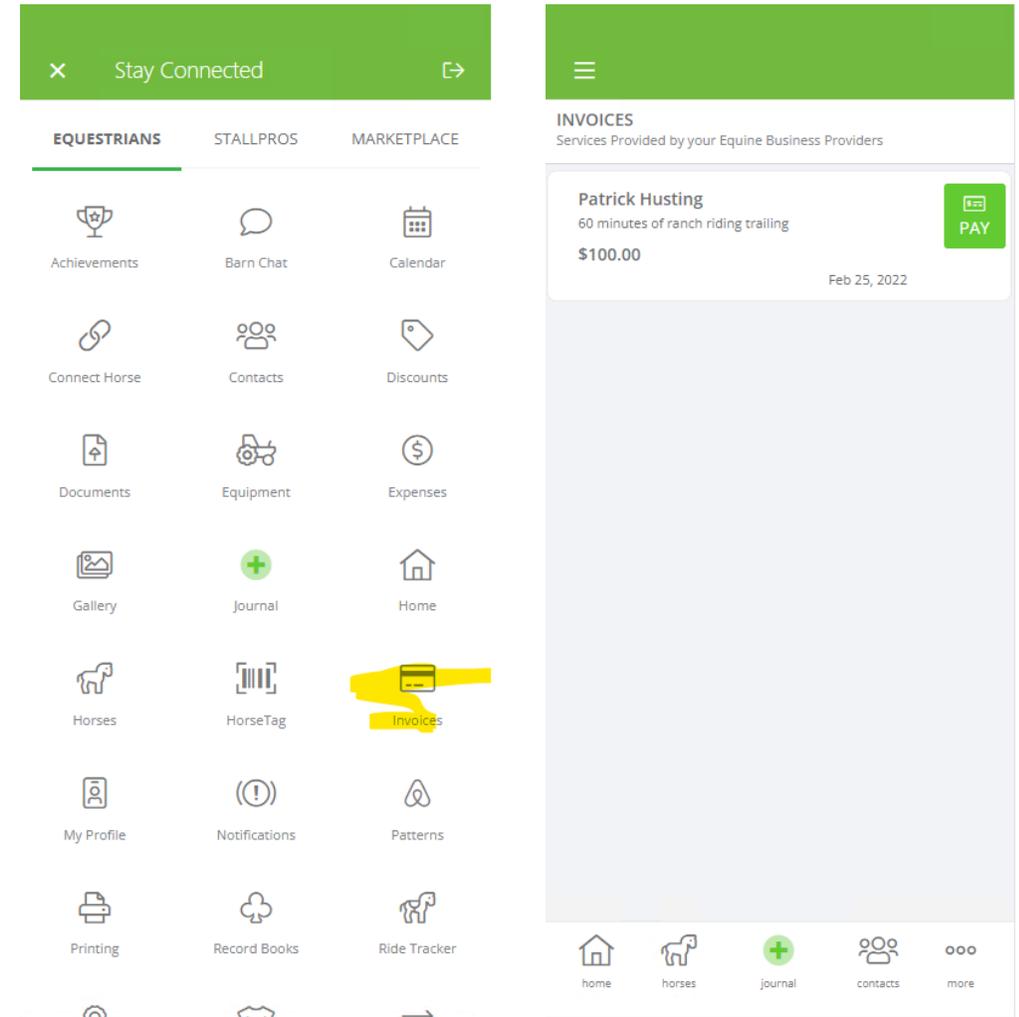
- An Email Notification gets sent
- A app notification is available in app
- If configured, they will also receive a text notification to their phone



# 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.



# 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

