



AURESTRA

# Aurestra Quick Start & Setup Guide

Guide updated May 25, 2026

A practical guide for setting up horse records, stable workflows, scheduling, boarding, and billing prep.

## Contents

1. Getting Started with Aurestra
2. Set Up Your Stable
3. Horse Records Overview
4. People, Contacts, and Owners
5. Book Arenas and Facilities
6. Care Records and Tasks
7. Boarding Packages and Assignments
8. Invoices, Payments, and Billing Prep
9. Client Balances, Credits, and Deposits
10. Aurestra Pro and Plan Limits
11. FAQ

---

## Getting Started with Aurestra

Aurestra helps horse owners, boarders, stable teams, and coaches keep barn information and day-to-day coordination in one practical place.

Use this guide to decide what to set up first. You do not need to configure everything on day one.

### What this helps with

- Creating your Aurestra account
- Verifying email or phone details when prompted
- Choosing the setup path that matches your role
- Adding the first horses, people, stable details, and bookings your barn needs

## Create your account

Open the Aurestra app on iOS or Android and create an account with your name, email, and password.

If Aurestra asks you to verify your email or phone number, complete that step before inviting other people or relying on notifications. Verification helps keep barn communication tied to the right person.

You can update your name, phone number, timezone, profile photo, password, and email from your account or profile area.

## Choose your starting path

Most people begin from one of these paths.

### Horse owner or boarder

Start with your horse record. Add the horse's core details, then build up the profile over time with photos, care notes, stable context, records, and bookings.

Useful next docs:

- [Horse Records Overview](#)
- [Care Records and Tasks](#)
- [Book Arenas and Facilities](#)

### Stable owner or manager

Begin with the barn's basic details, then add facilities, disciplines, useful contacts, billing profile details where applicable, and the setup prompts your team needs before organizing horses, owners, packages, and billing prep.

Useful next docs:

- [Set Up Your Stable](#)
- [People, Contacts, and Owners](#)
- [Boarding Packages and Assignments](#)
- [Invoices, Payments, and Billing Prep](#)

### Coach or service provider

Start by creating your coach profile where available. You can manage client relationships, lesson templates, lesson slots, and scheduling context depending on your access at a stable.

Useful next docs:

- [People, Contacts, and Owners](#)
- [Book Arenas and Facilities](#)

At this stage, Aurestra's service provider workflows are focused on coaches. Additional provider types may be handled differently as the product grows.

## **Invited by another Aurestra user**

If someone invited you to a horse, stable, coach relationship, ownership record, or agreement, create your account with the same email or phone number used in the invitation when possible.

After signing in, check your invitations, notifications, and shared records. What you can see or change depends on the connection and permissions set by the person or stable that invited you.

## **First setup checklist**

Start with the smallest useful setup:

1. Confirm your account details and notification preferences.
2. Add or accept access to the stable, horse, or coach relationship you need.
3. Add the most important people as contacts.
4. Add horse records and care context.
5. Add arenas or facilities if your barn will use scheduling.
6. Create the first care task, care record, or booking your team needs to coordinate.
7. Review setup prompts or action pills where available.
8. Complete billing profile, package, and invoice settings before relying on invoice workflows.
9. Review your plan details in the app if you run into an Aurestra Pro workflow or plan limit.

## **Keep setup practical**

Aurestra works best when the first records reflect real barn workflows: who cares for which horse, where the horse is boarded, which arena is being used, what is due next, and who needs to know.

You can add more detail as your barn routine settles.

# Set Up Your Stable

A stable record gives Aurestra a home base for barn operations: facilities, horses, contacts, announcements, board packages, bookings, and billing context.

You can start with just the essentials and add the operational details as your team begins using Aurestra.

## What this helps with

- Creating a stable profile
- Adding contact and location details
- Documenting barn policies and emergency information
- Adding photos, a logo, arenas, facilities, and disciplines
- Preparing for horses, owners, boarders, packages, and scheduling

## Create the stable

Create a stable when you manage or coordinate a barn, boarding facility, or private stable.

At minimum, add the stable name. You can add more barn details as you continue setup.

If your plan has a stable limit, Aurestra will show that limit in the app.

## Complete the barn profile

A stronger stable profile helps people understand how your barn operates.

As those fields are available in your setup, add practical details such as contact information, address, facilities, disciplines, arenas, and useful barn notes.

Keep this practical. The goal is to give boarders, staff, coaches, and invited users the context they need without replacing your formal barn handbook.

## Add media, logo, and hero image

Stable media can help people recognize the barn and understand the space. Add a logo, hero or cover image, and supporting stable photos where available.

Use the logo for brand recognition on stable and invoice surfaces where supported. Use the hero or cover image to represent the stable visually, and use supporting photos for barns, arenas, turnout areas, or other spaces people may need to recognize.

Plans may include media or storage limits. Current limits are shown in the app.

## Set up your billing profile

If your barn uses Aurestra Pro billing workflows, complete the stable billing profile before sending invoices.

Where available, billing profile fields can include legal or trade name, billing email, phone, address, tax settings, business numbers, GST/HST/QST details, US tax IDs, invoice footer note, and display settings for tax or business registration information.

Completing these details before sending invoices helps invoice PDFs and emails show the right barn identity, footer, logo, and tax or business registration display where supported. Tax settings help prepare invoice records, but they do not replace advice from an accountant, bookkeeper, or tax professional.

## **Set up arenas and facilities**

Add arenas or facilities that people may book or reference. For each facility, include a clear name and useful details such as type, size, and whether it is bookable.

After facilities exist, bookings can be tied to the right arena or space.

## **Add disciplines**

Disciplines help describe the barn's focus and make records easier to organize. Add the disciplines that fit your stable, such as hunter/jumper, dressage, eventing, western, racing, breeding, or rehabilitation.

Use the terms your barn team already understands.

## **Add stable contacts**

Stable contacts are useful for people and organizations connected to the barn. This can include owners, boarders, staff, vets, farriers, haulers, coaches, or emergency contacts.

Contacts do not always need to be Aurestra users. Some can be manually entered for reference, while others can be linked or invited when shared app access is needed.

## **Setup prompts and action items**

Aurestra may show setup prompts or action pills to help managers complete useful barn details. These prompts are guidance, not necessarily errors.

Stable prompts can include items such as missing boarding packages, boarding setup needed, stable contact missing, emergency contact missing, daily care missing, or public listing incomplete.

Tap or review a prompt where available to complete the relevant setup area. If a prompt does not apply to your barn's workflow, treat it as a reminder to review rather than a compliance warning.

## **Next steps**

Once the stable profile is in place:

- Add or connect horses
- Add owners, boarders, coaches, and important contacts
- Set up arenas and booking expectations

- Create boarding packages if your barn uses package-based board
- Assign horses to board packages where applicable
- Complete the billing profile before sending invoices where applicable
- Prepare agreement templates or invoice workflows if those Pro features fit your barn

## **Pro notes**

Basic stable setup, contacts, ownership records, boarding packages, and horse-to-package assignments are available for getting started. Agreement templates, advanced permissions, billing policy setup, invoice issuer actions, deposits, credits, balances, and invoice workflows may require Aurestra Pro depending on your role and current plan.

# Horse Records Overview

Horse records are the center of Aurestra. They keep practical details, care context, photos, notes, stable relationships, and history close to the people who need them.

## What this helps with

- Adding and updating horse details
- Keeping photos and profile images organized
- Recording care context, notes, and activities
- Understanding stable, ownership, and boarding context
- Supporting day-to-day coordination between owners, managers, and coaches

## Add the horse

Start with the details you know:

- Horse name, or the name your barn uses day to day
- Registered name if useful
- Gender, breed, colour, height, and foal date
- Status, such as active or retired
- Markings, identifiers, registry details, or microchip number where relevant
- Stable, boarding, or location context where available

You can edit the record as more information becomes available.

## Add photos and media

Photos help the barn team identify the horse quickly. Add a clear profile or avatar image and supporting media where available.

Use the profile image for quick recognition in lists and record headers. Use supporting photos or media for markings, condition references, documents, or other useful barn context.

Media and storage limits can depend on your current plan.

## Use the care profile

The care profile is for practical horse care context: feeding notes, medical notes, shoeing notes, allergies, medications, vices, and other important barn details.

This is not veterinary advice or a replacement for professional records. Use it to keep everyday barn context visible to the right people.

## **Add notes and care records**

Notes are useful for observations and context that do not need to be scheduled.

Care records are useful when something happened and should be logged, such as farrier work, medication, dental care, vaccination, bodywork, routine care, or a custom care type your barn uses.

## **Track activities and history**

Horse activity history can help show what has happened around the horse over time, including manually logged activity and activity created from supported bookings.

Use history as operational context, not as a substitute for professional medical, training, or accounting records.

## **Stable assignment and boarding context**

A horse can be connected to a stable so the barn can coordinate records, bookings, care, and boarding context.

Where available, a horse record can also show current boarding package information and assignment history.

## **Horse action pills and setup prompts**

Aurestra may show action pills or setup prompts on horse records to highlight useful next steps. These prompts are guidance, not necessarily errors.

Horse prompts can include owner missing, boarding issue or setup, payment issue, daily care missing, agreement missing, agreement expiring, or upcoming care and bookings where no higher-priority admin issue needs attention.

Tap or review a prompt where available to complete the related setup area, check the underlying record, or decide whether no action is needed for your barn.

## **Ownership and shared access**

Owners and managers may be able to manage ownership records, invite owners, or share horse access depending on their role, permissions, and plan.

Basic ownership records and boarding assignment context are available for barn-side organization. Advanced access control, agreement workflows, and billing workflows may require Aurestra Pro.

## **Verified and unverified owners**

Owners can be recorded for organization, sharing, and billing context.

Where available, verification helps confirm the owner's response or relationship to the horse record. A verified owner has been confirmed through the supported workflow. An unverified owner has been recorded but has not completed that confirmation.

Unverified ownership does not necessarily block basic barn-side setup or invoicing. It also is not legal proof of ownership. Use Aurestra ownership records as operational context, and rely on your own formal documents or professional advice where legal ownership matters.

# People, Contacts, and Owners

Aurestra separates practical contact information from app access. That makes it possible to keep useful barn contacts without forcing every person to create an account.

## What this helps with

- Understanding contacts, owners, boarders, coaches, and invited users
- Keeping people and organizations organized
- Choosing the right billing contact where available
- Sharing access carefully
- Knowing why visibility can differ by person

## Contacts vs Aurestra users

Contacts are barn-side records for people or organizations connected to your stable, horses, services, or billing workflows. A contact does not always need an Aurestra account.

A contact can represent:

- An owner or boarder
- A vet, farrier, hauler, bodyworker, or supplier
- A coach or trainer
- A staff member or emergency contact
- A company or organization

Contacts can include names, email addresses, phone numbers, and other useful details.

Use clear, current email and phone details when possible. This reduces duplicates and helps invitations or future links to Aurestra users work more cleanly where supported.

## Linked Aurestra users

Some contacts can later be linked to Aurestra users. This may happen through matching email or phone details, accepted invitations, or supported relationship workflows.

Linked users may be able to receive invitations, notifications, shared access, coach relationships, ownership requests, or agreement links depending on the workflow.

## Owners, boarders, and billing contacts

An owner is usually connected to horse ownership or horse context. This helps the barn organize records, sharing, communication, and billing context where available.

A boarder may be connected through a horse's stable relationship, boarding assignment, or related barn workflow.

A billing contact is the person or organization used for invoice and balance context. Depending on the barn's workflow, the billing contact may be an owner, a boarder, a parent, a company, or another responsible party.

These are operational relationships inside Aurestra. They help the barn keep work organized and do not replace legal ownership records, accounting systems, or formal contracts.

## **Verified and unverified owners**

Where available, owner verification confirms a response or relationship through the supported Aurestra workflow.

A verified owner has completed that confirmation. An unverified owner is still recorded for organization, sharing, or billing context, but has not completed the verification step.

Unverified ownership does not necessarily block basic barn-side setup or invoicing. Verification is not legal proof of ownership.

## **Stable and emergency contacts**

Stable contacts are people or organizations tied to the barn. They can be useful even if they are not owners or app users.

Use stable contacts for barn-wide reference: staff, vets, farriers, haulers, coaches, suppliers, emergency contacts, or frequently contacted people.

Where applicable, stable setup prompts may ask for missing stable or emergency contacts. Treat these as practical setup reminders, not as compliance warnings.

## **Invitations and shared access**

Invitations help bring another person into Aurestra with the right connection.

Depending on the workflow, an invitation may relate to a stable, horse, ownership record, coach/client relationship, agreement, or contact relationship.

What the invited person can see depends on:

- The relationship they accepted
- Their role at the stable or with the horse
- Permissions configured by the person or barn sharing access
- Whether the record, booking, invoice, or agreement is relevant to them

Advanced access-control invitations and permission workflows may require Aurestra Pro. Basic contacts, boarders, and operational ownership records can still be used for barn-side organization where you have access.

## **Coach and client relationships**

Where available, coach workflows can use service provider or coach profiles and client relationships. These relationships help organize coaching access, scheduling context, and horse permissions without making every coach a stable manager.

For booking and lesson-related scheduling context, see [Book Arenas and Facilities](#).

## Keep contact lists clean

Use clear names and current email or phone details. Avoid creating duplicates when a person already exists as a contact.

If a contact becomes an Aurestra user later, matching email or phone details can help connect the records more cleanly.

## Related guides

- [Horse Records Overview](#)
- [Set Up Your Stable](#)
- [Boarding Packages and Assignments](#)
- [Invoices, Payments, and Billing Prep](#)
- [Book Arenas and Facilities](#)

# Book Arenas and Facilities

Bookings help a barn coordinate shared spaces, lessons, free rides, maintenance, clinics, shows, and other scheduled activity.

They can reduce scattered texts and paper calendars, but they do not replace barn policies, real-world communication, or manager judgement.

## What this helps with

- Creating arena or facility bookings
- Choosing the horse and participants where available
- Coordinating lessons, free rides, maintenance, clinics, shows, and other barn events
- Respecting stable booking rules
- Checking for calendar export options where available

## Bookings, lessons, tasks, and appointments

A booking reserves or records time on the schedule, often tied to a facility or arena.

A lesson may be a booking connected to a coach, rider or client, horse, lesson slot, or lesson workflow where available.

A care appointment or care task usually belongs in the horse health and care workflow, not facility booking, unless a facility also needs to be reserved.

A general task is better for follow-up work that does not reserve a space.

Use the workflow that matches the real barn need: reserve time on the schedule, coordinate a lesson, log or schedule care, or create a follow-up reminder.

## Create a booking

Create a booking when someone needs a shared facility for a specific time.

Depending on the workflow, booking details may include:

- Stable
- Facility or arena
- Date and start/end time
- Booking type
- Horse
- Participants, such as rider, coach, viewer, or manager
- Title or notes
- Visibility
- Lesson or coach context where available

Only add the details that are useful for the barn workflow.

## Booking types

Booking types can include:

- Lesson
- Free ride
- Maintenance
- Clinic
- Show
- Other

Use the type that best explains why the space is reserved. This helps managers, boarders, and coaches understand the calendar at a glance.

## Stable rules and conflicts

Stable managers can define booking expectations for facilities where available.

Rules may affect who can book, which booking types are allowed, days or times, overlap behaviour, capacity, coach access, and visibility.

When you create or edit a booking, Aurestra may block or warn on conflicts or rule mismatches. Because booking permissions are role-sensitive, treat rule messages in the app as the source of truth for your current access.

## Lessons, coaches, and clients

Some lesson workflows connect bookings with coach profiles, client relationships, lesson slots or templates, horse access, and stable approval where available.

Coaches may need an active coach profile or an approved stable/client relationship before certain lesson bookings are allowed.

Stable managers may have broader visibility or controls than riders, clients, or other participants.

## Participants and visibility

Participants help identify who is involved in the booking.

Visibility depends on the stable, booking type, participant relationship, horse relationship, role, and permissions. Some details may be visible to managers but not all stable users.

## Editing or cancelling bookings

Edit a booking when the time, facility, horse, notes, visibility, or participants change.

Cancel or delete a booking only when the reservation should no longer appear on the schedule.

If a booking came from or is connected to a lesson workflow, changing it may affect lesson context where available.

## Calendar export

Where available, a stable calendar feed can be exported for use in an external calendar app.

Calendar feeds are useful for visibility, but edits should still be made in Aurestra so the barn record stays accurate. External calendar refresh timing may vary by calendar app.

## Related guides

- [Set Up Your Stable](#)
- [People, Contacts, and Owners](#)
- [Horse Records Overview](#)
- [Care Records and Tasks](#)
- [Aurestra Pro and Plan Limits](#)

# Care Records and Tasks

Care records and tasks help barn teams keep track of what happened, what is scheduled, and who may need to follow up.

They are for practical coordination. They do not replace veterinary advice, professional treatment records, or emergency care.

## What this helps with

- Logging completed health or care
- Scheduling appointments and follow-up care
- Tracking due dates and status
- Assigning work where available
- Keeping notes, attachments, and cost context
- Preparing invoice context from care where supported

## Care records and health logs

Use a care record or health log when something has already happened. In the app, this may appear as logging health, adding a health log, or adding a care record.

Examples:

- Farrier visit
- Deworming
- Dental care
- Coggins
- Medication given
- Vaccination
- Bodywork
- Routine care
- Custom care logged by your barn

Logged care becomes part of the horse's health and care history.

A care record can include the horse, type of care, date and time, notes, performed-by contact, attachments, and cost context where available.

## Scheduled care, appointments, and care tasks

Use scheduled care, an appointment, or a care task when something needs to happen in the future.

Examples:

- Upcoming farrier visit
- Vaccination reminder
- Dental appointment
- Deworming schedule
- Routine follow-up

Scheduled care can appear in upcoming care or appointments where available.

A scheduled item can include:

- Horse or stable context
- Care type and title
- Due date and time
- Alert or reminder where available
- Assigned or performed-by context where available
- Notes
- Recurrence or follow-up options where available
- Cost context
- Status, such as scheduled or completed

Do not rely on reminders as the only system for emergency or medically critical care.

## **How date and time affect wording**

The Add Care form may use the selected date and time to decide whether you are logging care or scheduling care.

If the selected date/time is in the past or effectively now, Aurestra may treat the entry as a logged health or care record.

If the selected date/time is in the future, Aurestra may treat it as scheduled care, an appointment, or a care task.

This helps the app separate what happened from what still needs to happen.

## **Upcoming, History, and All**

The horse health or care view may separate items into practical filters:

- Upcoming shows scheduled care or appointments that still need attention.
- History shows logged care records and completed care context.
- All shows both where available.

Overdue items may appear when scheduled care has passed and has not been completed.

## **Completing scheduled care**

When scheduled care is done, users may be able to mark it as done or log the completed care where available.

Completing a scheduled item can create or log a care record and keep the original care task aligned. Add notes or attachments if the barn needs context later.

## Recurrence and follow-ups

Where available, recurring or follow-up care can help schedule the next item after a log or appointment.

Examples include scheduling the next deworming, next farrier visit, or next vaccine follow-up.

Recurring tasks and reminder alerts may require Aurestra Pro or the right plan, permissions, and workflow.

## Care records and invoices

Where supported, care records or scheduled care with cost context can be used to prepare invoice drafts.

This is an Aurestra Pro billing workflow. Review any invoice carefully before sending, especially if care was logged quickly from the barn aisle.

For more detail, see [Invoices, Payments, and Billing Prep](#).

## Related guides

- [Horse Records Overview](#)
- [Invoices, Payments, and Billing Prep](#)
- [People, Contacts, and Owners](#)
- [Aurestra Pro and Plan Limits](#)

# Boarding Packages and Assignments

Boarding packages help a stable describe what it offers. Boarding assignments connect a horse to a package for a date range and can support billing and agreement workflows where available.

## What this helps with

- Defining board options
- Tracking package pricing and structure
- Assigning a horse to a package
- Scheduling future board changes
- Ending, cancelling, moving, or pausing an assignment where available
- Keeping owner, boarder, billing, and agreement context together

## Boarding packages

A boarding package can describe a type of board offered by the stable, such as full board, partial board, training board, pasture board, rehab board, or a custom package.

Package details can include:

- Package name and description
- Price and currency
- Tax percentage where applicable
- Invoice schedule, such as weekly or monthly
- Invoice settings and billing policy where available
- Available slots
- Custom package features
- Agreement template connection where available

Use package names that match how your barn actually talks about board.

## Invoice settings

Boarding packages can include invoice settings such as invoice schedule, draft generation day, payment terms, draft reminder or attention timing, and manual/auto-send settings where supported by your current workflow.

Draft generation timing controls when monthly draft invoices are prepared for review. Payment terms apply after an invoice is sent, not necessarily when a draft is created.

Draft reminders help stable managers catch invoices that have been prepared but not sent. Configure these settings before relying on invoice generation for a package.

## Assign a horse to a package

An assignment connects a horse to a package with a start date and, when needed, an end date. Where available, it can also include:

- Notes
- Initial boarding charge choices
- Deposit collection choices
- Billing contact
- Single or split billing mode
- Agreement context

Review assignment dates, package, billing contact, billing mode, deposit choices, and agreement context before generating or sending invoices.

## Current, scheduled, and past assignments

Assignments can be current, scheduled for the future, or historical.

- Current assignments describe the horse's active board arrangement.
- Scheduled assignments describe a future arrangement, such as a package change that starts next month.
- Past assignments preserve useful board history after an assignment ends.

Future-dated changes are useful when a horse will move from one package to another later, but the stable wants the schedule and billing context ready now.

## Changing a horse's board package

Where available, a stable can schedule a package transition instead of editing history in place.

For example, a horse can remain on one package through the end of the month and move to a new package on a future start date. Aurestra helps prevent overlapping active schedule ranges for the same horse so board history and billing context stay clearer.

If assignment dates change, draft billing obligations may also be affected. Some changes may be restricted once finalized billing exists.

## Ending vs cancelling an assignment

Ending an assignment is used when a current or active board arrangement should stop on a specific date.

Cancelling is used where available for a future or non-binding assignment that should not take effect. Cancelled future assignments are different from historical board records because the horse was not actually boarded under that scheduled arrangement.

Use notes or reasons where available so the barn can understand later why the assignment changed.

## Avoiding overlapping assignments

For clean scheduling, a horse should not have two binding boarding assignments covering the same dates.

If Aurestra warns about an overlap or date issue, review the existing assignment, proposed start date, proposed end date, and package transition plan. Start and end dates should reflect the operational reality of the horse's board.

## Billing choices when assigning board

Initial billing options help the stable decide what happens when a board assignment starts. Depending on the workflow, choices may include:

- Schedule the assignment only
- Create an invoice now for the full initial period
- Create an invoice now for a prorated initial period
- Add a prorated initial amount to the next billing cycle
- Do not collect a deposit
- Invoice a deposit now
- Add a deposit to the next billing cycle

These choices support billing prep. Review the draft invoice or next-cycle billing context before sending anything to a client.

## Pauses

Where available, a stable can record a pause with start and end dates.

Pauses help keep package capacity, billing context, and horse history aligned when board is temporarily interrupted.

## Agreements

If the stable uses boarding agreements, a package or stable default can be connected to an agreement template where available.

Agreement workflows are meant to help organize document handling. They are not legal advice. Have your own legal professional review boarding terms before relying on them.

## Billing context

Boarding assignments can support invoice preparation for supported billing scenarios.

Aurestra helps organize billing context, prepare drafts, and connect board package settings to invoices. It does not promise automated payment collection, tax filing, or full accounting replacement.

For invoice timing, drafts, credits, deposits, and client balances, see [Invoices, Payments, and Billing Prep](#) and [Client Balances, Credits, and Deposits](#).

## **Pro notes**

Basic package setup and assignment record-keeping are available for getting started with the right stable access. Billing policy setup, invoice workflows, deposits, credits, balances, invoice adjustments, and agreement workflows may require Aurestra Pro.

# Invoices, Payments, and Billing Prep

Aurestra helps barns prepare and manage operational billing records connected to horses, clients, packages, care, and stable work.

It is built for barn-side invoice preparation and tracking. It is not a full accounting replacement.

## What this helps with

- Preparing draft invoices
- Reviewing and finalizing invoice details where available
- Sending invoices and PDFs where supported
- Tracking invoice adjustments, extras, credits, deposits, and package changes
- Reviewing client/account balances and account context
- Recording payments received outside Aurestra
- Marking invoices paid or void
- Giving recipients read access to relevant invoices

## Invoice issuer and tax details

Before sending invoices, complete the stable billing profile where available.

Billing profile details can help invoice PDFs and emails show the correct barn or business information, such as legal or trade name, billing email, phone, address, logo, invoice footer note, tax settings, and business or tax registration details.

Tax settings help prepare invoice records and display tax context where supported. They do not replace advice from an accountant, bookkeeper, or tax professional.

## Draft invoices

Draft invoices can be created from supported barn workflows, such as boarding assignments or care records with cost context.

Before sending, review:

- Recipient
- Horse or boarding context
- Line item descriptions
- Quantity and unit price
- Tax settings where applicable
- Payment terms or due date display
- Memo or notes

## **Draft timing and payment terms**

Draft timing controls when invoices are prepared for stable review. Payment terms apply after an invoice is sent, so a draft invoice may show language such as "Due after sending" rather than a fixed due date.

If package billing settings create draft reminders or attention states, treat those as stable-side prompts to review and send the draft. They are not necessarily client payment issues.

## **Review, finalize, and send**

Where available, stable-side users can review invoice details, finalize invoices, assign invoice numbers, and send invoice PDFs by email.

Only send invoices after confirming the operational details are correct.

## **Overdue invoices vs draft reminders**

Sent invoices can become overdue when their due date has passed and a balance remains.

Draft invoices can need attention if they sit too long before being sent, but that means the stable should review the draft. It does not mean the client is overdue.

## **PDFs and email**

Invoices can be viewed as PDFs where available. Recipients may be able to view or request an invoice email if the invoice is shared with them.

Invoice PDFs and emails are designed to align with the invoice shown in Aurestra and may include the stable's issuer profile, logo, footer note, tax labels, and business registration display where available.

If an invoice does not have a recipient email, add or update the relevant contact details before sending.

## **Client balances, credits, and deposits**

Client/account balances help stable managers see account context for a client, including what is outstanding, what is still in draft, what may be overdue, and what credits or deposits exist where available.

Balances may include outstanding invoice amounts, draft invoice amounts, overdue amounts and counts, available credits, pending deposit collection, held deposits, net balance, related horses, and currency totals.

Last-month deposits can be tracked as pending collection, held, and later available as a credit depending on the workflow. Available credits can be applied to invoices where supported.

Deposits or credits may also be recorded as refunded or forfeited where supported. Refund and forfeiture records are Aurestra recordkeeping actions and do not necessarily mean money moved through Aurestra. Forfeitures may include tax context where applicable.

For more detail, see [Client Balances, Credits, and Deposits](#).

## **Adjustments, credits, and extras**

Adjustments can represent credits or extra charges. Depending on the workflow, they may be one-time or recurring, fixed amount or percentage-based, taxable or non-taxable, and tied to a stable, horse, client, or current draft invoice.

Use clear descriptions so owners, boarders, and managers understand why the line exists.

Credits applied to invoices may appear in invoice history in a payment-style way, such as "Deposit applied" or "Credit applied." This keeps the invoice balance understandable without implying Aurestra processed the underlying payment.

## **Payments**

Aurestra can record payments received, including amount, method, date, reference, and note where available.

Recording a payment in Aurestra is a barn-side tracking action. It does not necessarily mean the payment was processed through Aurestra.

## **Mark paid or void**

Where available, invoices can be marked paid or voided.

Voiding or changing an invoice can affect related billing context. Review carefully before making changes, especially if another system also tracks your barn's finances.

## **Recipient access**

Invoice recipients may have read access to invoices relevant to them. Stable-side invoice creation, sending, adjustment, payment, and voiding workflows may require Aurestra Pro and the correct stable access.

## **Accounting note**

Use Aurestra to keep barn billing workflows organized. Continue using your accountant, bookkeeper, tax professional, or accounting software for formal financial reporting, reconciliation, payroll, tax filing, and compliance decisions.

# Client Balances, Credits, and Deposits

Client balances, sometimes shown as account balances in the app, help stable managers understand billing context for a client without opening every invoice one by one.

They are designed for barn-side operational review. They do not replace accounting software, bank reconciliation, tax filing, or advice from a bookkeeper, accountant, or tax professional.

## What a client balance can show

Where available, a client or account balance can bring together:

- Outstanding sent invoice amounts
- Draft invoice amounts that have not been sent yet
- Overdue invoice amounts and counts
- Available credits
- Pending deposit collection
- Held deposits
- Net balance after available credits
- Related horses
- Currency totals

Use balances as a working view before sending invoices, following up with clients, or reviewing deposits and credits.

## Draft, outstanding, and overdue amounts

Draft invoice amounts are stable-side preparation amounts. They may still need review, changes, approval, or sending before they become a client payment request.

Outstanding amounts usually come from sent invoices that still have a remaining balance.

Overdue amounts are based on sent invoices with a due date that has passed and a remaining balance. A draft invoice that needs attention is not the same thing as an overdue client payment.

## Deposits

Some boarding workflows can track deposits, such as a last-month deposit.

Depending on the workflow and app state, a deposit may be:

- Pending collection, when the barn expects to collect it
- Held, after it has been recorded as collected or retained for future use
- Available as a credit later, such as when it can be applied to a final invoice

Review the assignment, billing contact, deposit option, and invoice context before relying on deposit records for billing prep.

## Credits

Available credits can reduce what a client owes where supported. Applying a deposit or credit may appear in invoice history in a payment-style way, such as "Deposit applied" or "Credit applied."

That history is recordkeeping context inside Aurestra. It does not necessarily mean funds moved through Aurestra.

## Refunds and forfeitures

Where supported, a deposit or credit may be recorded as refunded or forfeited.

A refund record means the barn marked the credit as returned or no longer available in Aurestra. It does not necessarily mean Aurestra processed the money movement.

A forfeiture record means the barn marked the remaining deposit or credit as retained. Forfeiture workflows may include tax context where applicable, but Aurestra does not decide tax treatment for the barn.

## Good review habits

Before applying, refunding, or forfeiting a credit, review:

- The client and related horse
- The original deposit or credit source
- The invoice being paid or adjusted
- Currency and amount
- Notes or references that will help the barn explain the record later
- Any tax or accounting guidance your barn relies on

For invoice workflow details, see [Invoices, Payments, and Billing Prep](#). For boarding setup, see [Boarding Packages and Assignments](#).

# Aurestra Pro and Plan Limits

Aurestra is free to start, with Pro available for expanded barn operations and supported business workflows.

Your current plan details, current pricing, and subscription options are shown in the app before you subscribe.

Prices and included limits can change, so rely on the app for the current offer attached to your account.

## What the free plan is for

The free plan is intended for getting started with core records and basic coordination.

Depending on your account and current plan settings, free use can include practical setup such as:

- Creating basic horse and stable records
- Keeping horse details, photos, notes, care context, and records
- Creating basic contacts
- Recording ownership relationships for barn-side organization
- Setting up basic boarding packages, boarders, and horse assignments
- Using boarding assignments for operational record-keeping
- Viewing records shared with you
- Creating and viewing bookings where you have access
- Reading invoices or documents that are shared with you

Free use may include limits on records, media, storage, or advanced workflows. Aurestra Pro increases or removes limits for supported workflows according to the current plan shown in the app.

## What Pro unlocks

Pro is designed for people coordinating more of the barn's operations, especially stable owners, managers, and teams handling multiple horses, boarders, agreements, billing policies, and invoice review.

Pro workflows can include:

- Expanded horse and stable capacity where supported by the current plan
- Recurring care tasks and reminder alerts
- More advanced ownership and sharing workflows
- Advanced permissions and team workflows where applicable
- Agreement templates and boarding agreement workflows where available
- Supported automated invoice workflows for Pro billing scenarios
- Stable billing profile, tax, and invoice issuer setup where supported
- Invoice preparation, review, sending, adjustments, payment records, client balances, credits, deposits, and business dashboard context

Exact availability can depend on your role, stable access, permissions, and current subscription state.

## **Why some workflows require Pro**

Some workflows create billing, legal, or business records for a stable. Examples include issuing boarding agreements, managing advanced permissions, configuring billing policies, generating invoice context, applying deposits or credits, tracking balances, or sending invoices.

Aurestra treats those as Pro barn operations because they usually require stable-level responsibility, auditability, and shared access control.

## **Billing and invoices**

Aurestra helps with barn-side billing workflows: preparing invoices, reviewing charges, sending invoice PDFs where available, recording payments, tracking adjustments, setting up invoice issuer details, reviewing client balances, and keeping billing context connected to horses, board packages, deposits, credits, and care records.

Billing profile and tax fields can help prepare invoice records and display the right barn or business details where supported. They are part of operational billing setup, not a replacement for accounting or tax advice.

Aurestra is not positioned as a full accounting replacement. Many barns may still use accounting software or a bookkeeper for taxes, reconciliation, payroll, and formal financial reporting.

## **Where to see current pricing**

Open the plans or subscription area in the app to see current pricing and plan details before subscribing.

Do not rely on old screenshots, forwarded messages, or outdated help articles for exact subscription pricing.

## **If you hit a limit**

If Aurestra tells you a workflow needs Pro or that you have reached a plan limit, review your plan details in the app. If something looks wrong for your account, contact Aurestra and include the email address on your account.

# FAQ

## Can I use Aurestra for free?

Yes. Aurestra is free to start. Free use may include limits on records, media, storage, or advanced workflows.

Your current plan details, pricing, and subscription options are shown in the app before you subscribe.

## What does Pro unlock?

Aurestra Pro supports expanded barn operations. Depending on your role and current plan, Pro can include workflows such as recurring care tasks, reminder alerts, advanced permissions and team workflows, advanced ownership and sharing workflows, agreement templates, invoice preparation, invoice sending, adjustments, payment records, deposits, credits, client balances, and business dashboard context.

Some workflows also require the right stable or horse access, not just a Pro subscription.

## What are client or account balances?

Client balances, sometimes shown as account balances in the app, bring together invoice and credit context for a client where available. They may show outstanding sent invoices, draft invoice amounts, overdue amounts, available credits, pending deposit collection, held deposits, related horses, and currency totals.

Use them as a stable-side review tool before sending invoices, following up, or applying credits. See [Client Balances, Credits, and Deposits](#).

## How do deposits and credits work?

Deposits and credits help track amounts that may affect what a client owes. For example, a last-month deposit may be pending collection, held, and later available as a credit depending on the workflow.

Credits can be applied to invoices where supported. Refunds and forfeitures are Aurestra recordkeeping actions and do not necessarily mean money moved through Aurestra. See [Client Balances, Credits, and Deposits](#).

## Should I complete my billing profile before sending invoices?

Yes, if your barn uses invoice workflows. Billing profile details help invoice PDFs and emails show the correct barn or business details where supported, including issuer name, contact details, address, tax settings, business numbers, footer notes, and logo.

Tax settings help prepare invoice records. They do not replace professional tax or accounting advice. See [Invoices, Payments, and Billing Prep](#).

## What is the difference between a draft invoice and an overdue invoice?

A draft invoice is stable-side preparation and may still need review, finalizing, or sending. An overdue invoice is a sent invoice with a due date that has passed and a remaining balance.

Draft reminders are prompts for the barn to review work. They are not the same as a client being overdue.

## **What is the difference between a booking, lesson, task, and appointment?**

A booking reserves or records schedule time, often for an arena or facility. A lesson may be a booking connected to coach, rider/client, horse, or lesson context where available.

Care appointments and care tasks usually belong in the horse health and care workflow unless a facility also needs to be reserved. See [Book Arenas and Facilities](#) and [Care Records and Tasks](#).

## **What is the difference between a health log and scheduled care?**

A health log or care record is for completed or past care. Scheduled care, an appointment, or a care task is for future or follow-up care.

This helps Aurestra separate what happened from what still needs attention. See [Care Records and Tasks](#).

## **Where can I see current pricing?**

Current pricing appears in the app before you subscribe. Do not rely on old screenshots or old help articles for exact subscription prices.

## **Can I import spreadsheets?**

In many cases, yes. If you have horse lists, owner lists, boarder records, or other barn spreadsheets, contact Aurestra at [info@aurestra.com](mailto:info@aurestra.com).

Imports can vary based on the spreadsheet structure and the amount of cleanup needed.

## **Can historical data be migrated?**

Sometimes. Historical care logs, calendars, invoices, and other records are more custom than a simple contact or horse list.

Send us a note with a sample of what you have. We can help decide whether assisted setup or a custom migration is the best path.

## **Who can see my data?**

Visibility depends on the connections, roles, permissions, shared horses, shared stables, invitations, bookings, invoices, and agreements configured in Aurestra.

For example, a stable manager, owner, boarder, coach, or invited contact may see different information based on their relationship to the record. Some schedule details may be visible to the stable, while other details may be limited to participants or managers.

Use sharing and invitations carefully, and review access if a person's barn relationship changes.

## **How do sharing and permissions work at a high level?**

Aurestra uses relationships to decide access. A person may be connected through a stable, horse, ownership record, coach/client relationship, invitation, booking, invoice, or agreement.

Permissions can affect what a person can view or manage. Advanced access-control invitations and permission workflows may require Aurestra Pro; basic contacts, boarders, and ownership records can still be used for barn-side organization where you have access.

## **Does Aurestra replace accounting, legal, veterinary, or tax advice?**

No. Aurestra helps with barn-side operations such as records, scheduling, care context, invoice preparation, operational billing context, and payment record keeping.

It does not replace accounting software, bookkeepers, accountants, tax professionals, veterinarians, emergency care, legal contracts, or formal proof of ownership.

## **What does Verified or Unverified owner mean?**

Verified means the ownership relationship has been confirmed through a supported Aurestra workflow. Unverified means the owner is recorded for organization, sharing, or billing context but has not completed that confirmation.

Unverified ownership does not necessarily block basic barn-side setup or invoicing. Verification is not legal proof of ownership.

## **How do I get help?**

Contact Aurestra at [info@arestra.com](mailto:info@arestra.com) or use the contact form on the Aurestra website.

When asking for help, include the email address on your Aurestra account and a short description of what you were trying to do.

## **How do I delete my account?**

Aurestra provides account deletion from the app where available and has a website page with deletion guidance.

Visit [aurestra.com/delete-account](https://aurestra.com/delete-account) for current instructions. If you need help, contact us from the email address associated with your account.