AURESTRA

Aurestra Quick Start & Setup Guide

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

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Getting Started with Aurestra

Aurestra helps horse owners, stable management, and equine professionals keep horse records, care, schedules, services, relationships, and billing context 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
- Stable Billing Setup Checklist
- Boarding Packages and Assignments
- Invoices, Payments, and Billing Prep

Equine professional

Start by creating an equine business profile and selecting the services you offer. You can make the profile discoverable, manage clients, connect with stables, and coordinate appointments with the relevant horse context.

If Coaching is one of your services, Aurestra also provides lesson-focused tools for templates, lesson times, clients, horses, enrollments, and reservations.

Useful next docs:

- Set Up an Equine Business
- Service Appointments and Lessons
- People, Contacts, and Owners
- Book Arenas and Facilities

Invited by another Aurestra user

If someone invited you to a horse, stable, equine business 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 equine business 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, invoice, and online payment settings before relying on business billing workflows.
9. Review your plan details if you want to add another stable or equine business, need more storage, or are ready to use Pro billing tools.

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.

Aurestra Free includes one stable profile. Aurestra Pro supports multiple stable profiles.

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 horse owners, boarders, equine professionals, 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.

Aurestra Free includes 250 MB of total account storage. Aurestra Pro includes 5 GB.

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 billing schedule defaults, 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.

For a step-by-step billing settings walkthrough, see Invoices, Payments, and Billing Prep.

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.

Connect equine professionals

Active stable connections let equine businesses coordinate appointments at your barn with the horse and client context the relationship supports.

A stable or equine business can begin the connection workflow. Stable management retains control of the relationship and the access made available through it. A connection does not expose every horse or stable record automatically.

For the professional workflow, see Set Up an Equine Business and Service Appointments and Lessons.

Share stable announcements

Stable announcements can help management keep connected people informed about barn-wide updates.

Use them for operational information that belongs with the stable, such as a facility closure, maintenance update, clinic notice, or change people should see. Announcements are not a substitute for emergency communication or direct contact when a specific person needs to act quickly.

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, equine professionals, and important contacts
- Connect the equine businesses that work with your stable
- 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 and connect them to boarding where your stable uses them
- Set up Pro billing and invoice workflows if they fit your barn
- Connect Stripe if your business wants to accept eligible invoices online

Pro notes

Stable setup, contacts, invitations, ownership records, boarding packages, horse-to-package assignments, and foundational agreement workflows are included with Aurestra Free. Pro is required for billing policy setup, invoice issuer actions, invoice preparation and sending, deposits, credits, adjustments, balances, payment management, and online payments. Access to each workflow still depends on your role and stable permissions.

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, stable management, and equine professionals

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.

Aurestra Free includes 250 MB of total account storage. Aurestra Pro includes 5 GB.

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.

Completed horse-specific services from an equine professional appointment can also add care context to the horse's history. This keeps the service and professional connected to the horse without requiring someone to rebuild the record from a text message later.

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 and permissions.

Ownership records, invitations, boarding context, and foundational agreement workflows are included with Aurestra Free. Billing and invoice-management workflows require Pro for the stable or equine business creating them.

For a walkthrough on reviewing or updating horse ownership, see People, Contacts, and Owners.

For agreement access and boarding onboarding, see Agreements and Boarding Onboarding.

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, equine professionals, 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 another equine professional
- 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, professional or client 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 horse can have one owner or multiple ownership records. Where supported, split ownership can include each owner's percentage so the horse record reflects how the barn understands the relationship.

Ownership can be connected to an existing contact, your own contact record, or a new contact created for the person. Use clear names, email addresses, and phone numbers so access, verification, and billing review are easier later.

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. Assigning an owner is useful even when the person responsible for payment is different later. Ownership helps keep the horse connected to the right person, can support owner access where used, and gives the barn a clearer starting point when confirming billing details.

Aurestra ownership records 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.

Video tutorial: Review and update horse ownership in Aurestra

Verification requests can be sent by supported contact channels, such as email or text message, when the contact has deliverable details. The owner can then confirm the relationship through the 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, professional/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

Contacts, invitations, boarder relationships, and ownership records are included with Aurestra Free. What someone can see or manage still depends on the relationship and permissions attached to the invitation or record.

Equine professional and client relationships

Equine business profiles can manage clients and active connections with stables. These relationships provide the supported client, location, and horse context for professional appointments without making the professional a stable manager.

Coaching profiles use the same business foundation and add lesson-focused relationships and scheduling tools.

For setup and scheduling, see Set Up an Equine Business and Service Appointments and Lessons.

Agreement access

Agreement access is narrower than ordinary horse or contact access. The named parties and authorized management for the issuing stable can access a document through the supported workflow.

Being recorded as an owner, boarder, stable contact, or person with access to the horse does not automatically make every agreement visible. See Agreements and Boarding Onboarding.

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
- Set Up an Equine Business
- Agreements and Boarding Onboarding

Stable Billing Setup Checklist

Use this checklist before you follow the billing tutorial videos. It gives your barn a simple setup path so invoices, packages, payments, and balances have the right information behind them.

Who this is for

This guide is for boarding barns using Aurestra to organize board billing, monthly invoices, adjustments, payments, and client balances.

It is especially helpful if you are new to Aurestra and wondering what needs to be set up first before billing will make sense.

What to gather before you start

You do not need everything to be perfect on day one, but having these details nearby will make setup much smoother:

- Stable or barn name and billing contact details
- Legal or trade name if invoices should show one
- Billing email, phone, and address
- Tax rate or tax display details, if applicable
- Board package names and prices
- Horse list
- Owner, boarder, or billing contact names and emails
- Which package each horse is on
- Any deposits, credits, current balances, or one-time adjustments
- Payment instructions or footer notes to show on invoices
- Stripe business and bank details if you plan to offer online payment

Recommended setup order

Work through these steps in order. Each step gives the next one better information to use.

1. Create your Aurestra account.
2. Create your stable.
3. Add stable or barn details and a logo if you have one available.
4. Add contacts for owners, boarders, and billing contacts.
5. Add horse records.
6. Assign owners to horses and confirm the billing contact where needed.
7. Complete billing and tax settings.
8. Create boarding packages.

9. Assign boarding packages to horses.
10. Add any adjustments, credits, or deposits.
11. Connect Stripe if the stable will accept eligible invoices online.
12. Review and issue boarding invoices.
13. Track Stripe-confirmed payments or record payments received outside Aurestra.

If you are short on time, start with the horses and contacts you need for the next billing cycle. You can come back later to fill in extra notes, history, or non-billing details.

Helpful tutorial videos

These videos are most useful after your stable, contacts, horses, and basic billing context are in place.

Video tutorial: Set up billing settings in Aurestra

Video tutorial: Review and update horse ownership in Aurestra

Video tutorial: Set up boarding packages for billing in Aurestra

Video tutorial: Assign a boarding package to a horse in Aurestra

Video tutorial: Add invoice adjustments in Aurestra

Video tutorial: Review and send draft boarding invoices in Aurestra

Video tutorial: Record a payment in Aurestra

Tips for your first billing cycle

- Start with a small set of real records if that feels easier. For example, set up one or two horses and confirm the invoices look right before adding the rest.
- Review invoices before issuing them, especially the first time. Check the recipient, horse, package, dates, taxes, adjustments, footer note, and amount due.
- Use clear descriptions for adjustments, such as "May training add-on" or "Deposit credit applied." This helps both your barn and the client understand the invoice later.
- Continue using your accountant, bookkeeper, tax professional, or accounting software for formal financial records, reconciliation, payroll, tax filing, and compliance decisions.
- A payment you record manually is a tracking action. A Stripe payment is processed separately and updates the invoice after Stripe confirms it.

Related guides

- Set Up Your Stable
- People, Contacts, and Owners
- Boarding Packages and Assignments
- Invoices, Payments, and Billing Prep

- Online Payments with Stripe
- Client Balances, Credits, and Deposits

Book Arenas and Facilities

The Aurestra schedule brings together facility bookings, lessons, equine professional appointments, care tasks, reminders, 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
- Coordinating lessons, free rides, maintenance, clinics, shows, and other barn events
- Finding professional appointments, care tasks, and reminders on the same schedule
- Respecting stable booking rules
- Filtering the schedule by stable, horse, equine professional, item type, or completion status
- Using calendar export 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 is connected to a coaching profile and can include client, horse, lesson time, enrollment, or reservation context.

A professional appointment belongs to an equine business and can be connected to a client, stable, horse, and one or more service items.

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 a facility, coordinate a lesson, schedule professional work, log or schedule care, or create a follow-up reminder.

Use the shared schedule

The schedule can show all activity together or be narrowed to the view you need.

Depending on your role and connections, filters can include stable, horse, equine professional, schedule type, and completed status. Quick actions can be used to add a lesson, task, reminder, facility booking, or professional appointment.

Visibility still follows the underlying stable, horse, client, booking, and professional relationships. Seeing a schedule item does not grant broader access to every connected record.

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 owner, boarder, coach, client, 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 stable management, horse owners, 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 and professional appointments

Lesson workflows connect coaching profiles with client relationships, lesson times or templates, horse access, and stable approval where needed.

Coaches need an active coaching profile and the supported stable, client, horse, or facility relationship before certain lesson activity is allowed.

Equine professionals use service appointments for other professional work. An appointment can be arranged directly with a client, coordinated with a connected stable, or created without a client when the relationship has not been set up yet.

For details, see Service Appointments and Lessons.

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
- Service Appointments and Lessons
- Set Up an Equine Business
- Aurestra Free and Pro

Service Appointments and Lessons

Aurestra helps equine professionals coordinate work with clients and connected stables while keeping the relevant horse, service, notes, schedule, and billing context together.

Professional appointments are available for equine services. Coaching profiles also have lesson-specific tools.

What this helps with

- Creating a professional appointment
- Choosing a client, connected stable, or standalone context
- Adding one or more horses and service items
- Keeping appointments visible on the shared schedule
- Completing horse-specific work and adding it to horse history
- Preparing completed work for billing with Pro
- Using lesson templates and reservations for coaching

Choose the right workflow

Use a service appointment for professional work such as farrier care, veterinary care, dentistry, bodywork, hauling, clipping, or another service your business offers.

Use a lesson when the business profile includes Coaching and the activity is a coaching session. Lesson workflows are designed for lesson times, riders or clients, horses, enrollments, and reservations.

Use a facility booking when the main need is to reserve an arena or shared space. A lesson or appointment may still have facility context, but it should begin from the workflow that best describes the work.

Create a service appointment

Start from the equine business profile or the schedule and choose **Add appointment**.

Add the service, date and time, location, title, and notes. Then choose the context:

- **Client**, for work arranged directly with someone connected to your business
- **Connected stable**, for work being coordinated at a barn your business is connected to
- **No client yet**, for a standalone appointment you need to record before the relationship is set up

Choosing a client or connected stable makes the supported horses for that relationship available to the appointment.

Add horses and service items

An appointment can contain one or more service items. Each item can keep its own horse, service description, duration, notes, price status, and amount where applicable.

This is especially useful for a coordinated stable visit. One appointment can represent the visit while each horse's work remains distinct.

Only horses available through the selected client or stable context can be attached. If a horse is missing, review the client, stable connection, ownership, or horse-sharing relationship rather than creating a duplicate horse.

Pricing and billing context

You can leave an item unpriced, add an estimate, or finalize the amount as the work becomes clear.

Pricing context does not send an invoice by itself. With Aurestra Pro, a completed item with a finalized price can become billable activity that the business can use when preparing invoices.

Without Pro, the appointment and horse-history workflow still works. Only the business billing activity is skipped.

Complete the work

Complete each active service item after the work is done. Horse-specific completed items can add a care record to the horse's history, including the professional and service context.

All active service items must be completed, cancelled, or removed before the overall appointment can be completed.

Review notes and pricing before completion. Once an appointment or item reaches a completed or cancelled state, editing options may be more limited so the record remains consistent.

Lessons for coaches

Coaching profiles can use lesson templates and lesson times to organize repeatable coaching availability.

Depending on the lesson setup, coaches can connect clients and horses, manage reservations or enrollments, complete lessons, and prepare completed lesson work for billing with Pro.

Stable access and horse availability still depend on the active relationships and permissions. A coach does not automatically receive stable-wide or horse-wide access by creating a lesson.

Find appointments on the schedule

The Aurestra schedule brings together professional appointments, lessons, facility bookings, care tasks, and reminders.

Use the available filters to narrow the view by stable, horse, equine professional, item type, or completion status. Quick actions can be used to add an appointment, lesson, task, reminder, or facility booking based on your role and access.

Related guides

- Set Up an Equine Business
- Book Arenas and Facilities

- Care Records and Tasks
- Horse Records Overview
- Invoices, Payments, and Billing Prep

Set Up an Equine Business

Aurestra gives equine professionals a business profile for keeping services, clients, stable connections, appointments, horse context, and billing activity together.

Coaches use the same business foundation, with lesson tools added for coaching workflows.

What this helps with

- Creating an equine business profile
- Describing the services you offer
- Choosing whether clients and stables can discover your profile
- Managing clients and stable connections
- Coordinating appointments and horse-specific work
- Using lesson tools when Coaching is one of your services
- Preparing business invoices with Aurestra Pro

Create the business profile

Choose the service categories that describe the work you actually offer. You can select more than one category or add a custom service where needed.

Add a clear business name, description, contact details, and the location or service area you want clients to see. Photos, a logo, and a cover image can help people recognize your business, but you can begin with the essentials and add more detail later.

Aurestra Free includes one equine business. Aurestra Pro supports multiple equine businesses and stables.

Choose how people find you

A business profile can be public or private.

When public listing is enabled, clients and stables can find the profile in Aurestra's services area. You can also show whether you are accepting new clients and set a service radius to help people understand the area you cover.

Public listing is optional. Turning it off does not remove your existing client or stable connections.

Add useful professional details

Use the profile to share the details that help clients understand your work, such as:

- Services offered
- Contact information
- Public location or service radius
- Background and business description

- Licensing or insurance information you choose to share
- Disciplines, competition levels, and specializations for coaching profiles

Keep the profile current. Aurestra displays the information you provide but does not independently verify credentials, licensing, insurance, or professional standing.

Manage clients

Clients can be Aurestra users or practical contact records you manage for the business.

Adding a client gives appointments and billing a clearer person to connect to. Where the relationship supports it, the client's horses can also be available when you create an appointment.

You can keep a client active, pause the relationship, or remove it as the working relationship changes. Client access to records still depends on the specific relationship, horse, appointment, invoice, and permissions involved.

Connect with stables

A stable connection helps your business coordinate work at a barn without adopting a different disconnected process for every stable.

The business or stable can start the connection workflow. Once the relationship is active, you can use that stable as appointment context and work with horses made available through the connection.

A stable connection does not make every stable record or horse visible. Each side continues to see only the information supported by the relationship and permissions in Aurestra.

Appointments, services, and horses

Create an appointment for a client, a connected stable, or as a standalone appointment when the client is not set up yet. Add the date, time, location, notes, service type, and individual service items needed for the visit.

Service items can be connected to horses available through the selected client or stable. This is useful for a visit involving several horses because each horse's service, notes, duration, and price context can stay distinct.

When a horse-specific service is completed, Aurestra can add the completed care context to that horse's history. With Pro, finalized prices can also become billable activity for invoice preparation.

For the complete workflow, see Service Appointments and Lessons.

Coaching profiles and lessons

When Coaching is selected as a service, Aurestra adds lesson-focused tools for templates, lesson times, clients, horses, enrollments, and reservations.

Use lesson workflows for coaching rather than creating a general professional appointment for the same work. Other equine services continue to use service appointments.

Billing setup

Aurestra Pro adds business billing settings, invoices, client balances, payment records, and Stripe online payments.

An equine business can issue invoices through its own business profile. If you also run a stable, you can choose the stable as the invoice issuer where that matches how your businesses are set up. Save the issuer choice before managing online payments so Aurestra uses the settings for the business actually sending the invoice.

For billing details, see Invoices, Payments, and Billing Prep and Online Payments with Stripe.

Related guides

- Service Appointments and Lessons
- Book Arenas and Facilities
- People, Contacts, and Owners
- Invoices, Payments, and Billing Prep
- Aurestra Free and Pro

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 care 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.

An appointment created by an equine professional is managed through that professional's business workflow. When a horse-specific service item is completed, Aurestra can add the completed care context to the horse's history. See Service Appointments and Lessons.

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 are included with Aurestra Free. The person creating or managing an item still needs access to the relevant horse, stable, or schedule.

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
- Service Appointments and Lessons
- Aurestra Free and Pro

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
- Total capacity or available slots
- 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.

The package price and currency are the rate Aurestra uses when that package is assigned to a horse for billing. If the package needs a different tax rate than the stable's default billing settings, set a package-specific tax percentage. Otherwise, leave the package tax field blank where available so the stable billing profile can supply the default tax context.

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.

Video tutorial: Set up boarding packages for billing in Aurestra

Most boarding packages use a monthly invoice schedule, but review the schedule and draft settings before relying on automated draft preparation.

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.

When you are first setting up billing, reviewing drafts before sending is usually the safer workflow. Auto-send can be useful later once package pricing, taxes, recipients, and draft timing are consistently configured.

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:

Video tutorial: Assign a boarding package to a horse in Aurestra

- Package option or package-specific details where available
- Start date and optional end date
- Notes
- Initial boarding charge choices
- Deposit collection choices
- Billing contact
- Single or split billing mode
- Boarding pause dates and reason
- Agreement context

If the horse is not already connected to the stable, complete that stable relationship first so the correct boarding packages are available.

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

For single billing, confirm the billing contact that should receive the invoice. If no explicit billing contact is saved, supported invoice workflows can fall back to the horse's active ownership record. For split billing, Aurestra can use ownership percentages where supported.

Once saved, boarding assignment details help Aurestra prepare board charges for the right horse, package, period, and billing contact.

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 can be connected to an agreement template. A stable default can be used when a package does not need its own agreement.

After the boarding assignment and party contacts are ready, an authorized stable manager can issue the agreement. Editing the template later does not rewrite an agreement that was already issued.

Agreement templates, acceptance, and document history are included with Free. They remain permission-based and are separate from Pro billing tools.

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.

See Agreements and Boarding Onboarding for the complete workflow.

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

Boarding package setup, horse assignments, pauses, and foundational agreement workflows are included with Aurestra Free for people with the appropriate stable access. Pro is required for billing policy setup, invoice preparation and sending, deposits, credits, balances, invoice adjustments, payment management, and online payments.

Agreements and Boarding Onboarding

Agreements help a stable document expectations during boarding onboarding and keep the accepted record available to the people involved.

Foundational agreement templates, acceptance, and document history are included with Aurestra Free. The person managing them still needs the appropriate stable permission.

What this helps with

- Preparing reusable agreement templates
- Using an Aurestra template as a starting point
- Setting a stable default or package-specific boarding agreement
- Issuing an agreement for a boarding assignment
- Keeping review and signature status visible
- Giving each party access to the agreement relevant to them
- Keeping the completed document with the horse's boarding history

Prepare the agreement template

Stable managers with agreement access can create a template for their stable or clone an available Aurestra template and adapt it.

Give the template a clear name and choose the agreement type that matches its purpose. Review the complete body before using it with a real client.

Aurestra helps organize the workflow but does not write legal terms for your stable or confirm that a template is suitable for your jurisdiction. Have a qualified legal professional review the terms you rely on.

Choose where the template applies

A stable can set a default boarding agreement and can also attach a different template to a specific boarding package.

A package-specific template is useful when different board arrangements have materially different terms. If a package does not have its own template, the stable default can provide the boarding agreement where configured.

Review the template connection before assigning the package. Changing a template later does not rewrite an agreement that was already issued.

Set up the people first

Before issuing an agreement, confirm the horse, stable, boarding assignment, verified current ownership records, and the account or email details used to reach each signing party.

An existing owner or boarder can still be brought into Aurestra. Onboarding does not only apply to a brand-new client. Confirm the ownership and contact records first, then use the current agreement and boarding details to create a shared understanding going forward.

Issue the boarding agreement

After the boarding assignment and template are ready, an authorized stable manager can issue the agreement from the boarding workflow.

Aurestra creates the agreement for the specific horse, stable, boarding relationship, and parties involved. If the app says the agreement cannot be issued, review the package template, stable default, boarding assignment, party contacts, and your stable permissions.

Review and acceptance

Each signing party receives access to review the agreement that applies to them. They can type their name or draw a signature and confirm electronic consent. The agreement can move through states such as issued, viewed, partially signed, and executed as the parties respond.

Once all required parties have signed, Aurestra keeps the executed document available through the supported agreement history and PDF workflow.

If terms need to change after an agreement has been issued, do not assume editing the template changes the existing document. Prepare the correct updated agreement and use the supported issue workflow again where appropriate.

Who can see an agreement

Agreement access is intentionally narrower than general horse access.

The parties named on the agreement and authorized management for the issuing stable can access the document through the supported workflow. Being an owner, boarder, stable contact, or person with access to the horse does not automatically make every agreement visible.

This helps keep private documents limited to the people involved while still allowing a verified current owner to reach the horse's agreement area when supported.

Agreements and billing are separate

Agreements are included with Free. Pro is not required simply to prepare templates, issue a boarding agreement, or retain the agreement history.

Billing policy, deposits, invoice preparation, payment management, and online payments are separate Pro business workflows. An agreement can document payment expectations without turning those terms into an invoice automatically.

Related guides

- Boarding Packages and Assignments

- People, Contacts, and Owners
- Horse Records Overview
- Set Up Your Stable
- Aurestra Free and 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
- Accepting eligible invoice payments online through Stripe
- Distinguishing Stripe refunds from offline records and corrections
- 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.

Video tutorial: Set up billing settings in Aurestra

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, invoice schedule defaults, and business or tax registration details.

Billing schedule settings can define the usual invoice day, how far ahead draft invoices should be prepared, and how soon payment is due after an invoice is sent.

Business identity fields can include the legal business name, display or trade name, billing contact details, and billing address. If the stable uses a separate billing address, use the billing profile address rather than relying only on the stable profile address.

Invoice display settings can control whether supported business or tax registration details appear on invoices, and an invoice footer note can add stable-specific payment instructions or other short billing text.

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

Where supported, tax setup can include a default tax label, rate, region code, Canadian registration details such as GST/HST/QST information, and U.S. registration details such as state tax or sales tax permit numbers.

Draft invoices

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

If your barn uses package-based board, set up package pricing and invoice settings before relying on draft generation. See Boarding Packages and Assignments.

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 issued, so a draft invoice may show language such as "Due after issuing" 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.

Video tutorial: Review and send draft boarding invoices in Aurestra

Only send invoices after confirming the operational details are correct.

Overdue invoices vs draft reminders

Issued 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.

When the issuing business has connected Stripe and the invoice is eligible, the PDF or shared invoice view can include a secure online payment option for the billed contact.

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 resolved as refunded, settled outside Aurestra, corrected, or forfeited where the available action supports it. The action you choose determines whether Aurestra asks Stripe to return funds or only records something handled elsewhere. 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.

Video tutorial: Add invoice adjustments in Aurestra

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 received outside Aurestra

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

Video tutorial: Record a payment in Aurestra

Confirm the amount before saving the payment. If the app pre-fills the invoice total, adjust the amount when recording a partial payment.

Use the optional reference and note fields for details the barn may need later, such as a cheque number, e-transfer confirmation, or other payment context.

After a payment is recorded, Aurestra updates the invoice payment totals and status based on the amount received. A partial payment may leave a remaining balance, while a full payment can mark the invoice paid.

Recording a payment in Aurestra is a business-side tracking action. It does not process the payment or move money through Stripe.

Stripe online payments

Aurestra Pro stables and equine businesses can connect Stripe and offer online payment on eligible issued invoices.

The billed contact does not need Pro. When the secure payment option is available, Stripe processes the payment and Aurestra updates the invoice after Stripe confirms the result.

An invoice must be issued, have an eligible balance and currency, and use a business whose Stripe connection is ready. Draft, closed, unsupported, or review-blocked invoices do not offer online payment.

For setup, payment readiness, fees, and client flow, see Online Payments with Stripe.

Refunds and financial corrections

An eligible Stripe refund asks Stripe to return funds to the original payment method. Stripe and its confirmation remain authoritative.

An offline refund, settlement, write-off, or ledger correction records how the business handled the balance without sending money through Stripe. Available actions depend on the invoice, payment source, current balance, and the user's business permission.

Review the source payment and action description carefully. Do not use an offline record when the business expects Aurestra to send a Stripe refund.

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 can read invoices relevant to them without subscribing to Pro. They can also use an online payment option made available on an eligible invoice without purchasing Pro. Invoice creation, sending, adjustments, payment management, and voiding require Aurestra Pro for the issuing stable or equine business, along with the correct access and permissions.

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.

Online Payments with Stripe

Aurestra Pro businesses can connect Stripe so clients can pay eligible invoices securely online. Payments go directly to the connected Stripe account while Aurestra keeps the invoice and payment status together.

You can still accept e-transfer, cheque, cash, or another payment method and record that payment in Aurestra.

What this helps with

- Setting up a new Stripe account or connecting an eligible existing account
- Understanding whether the business is ready to accept payments
- Giving the billed contact a secure online payment option
- Keeping Stripe-confirmed payments connected to the invoice
- Pausing, resuming, or disconnecting online payments
- Understanding Stripe fees and Aurestra's role

Who can set up online payments

Online payment setup is available to Aurestra Pro stables and equine businesses with the appropriate management permission.

The invoice recipient does not need Pro. When an eligible invoice includes a secure payment link, the billed contact can use that link without purchasing an Aurestra subscription.

Online payments are currently available for eligible Canadian and U.S. businesses and supported CAD or USD invoices.

Start Stripe setup

Open the billing settings for the stable or equine business that will issue the invoices, then open **Online payments**.

Choose one of the available setup paths:

- **Set up with Stripe**, to create the connected Stripe account through the guided setup
- **Connect an existing Stripe account**, to authorize an eligible existing account

Stripe collects the business, identity, banking, and verification information it requires. Complete the Stripe steps, return to Aurestra, and refresh the connection status if it has not updated yet.

Only a business manager can change the connection. Other people with billing visibility may be able to see the current status without being able to manage it.

Understand the connection status

Aurestra can show states such as:

- **Not set up**, when the business has not started Stripe setup

- **Setup in progress**, while details are incomplete or Stripe is reviewing them
- **Needs attention**, when Stripe requires more information or has restricted the account
- **Connected**, when charges and payouts are ready
- **Paused**, when the business has temporarily stopped online payments
- **Managed by a stable**, when an equine business has selected a stable as its invoice issuer
- **Disconnected**, when Aurestra's connection to the Stripe account has been removed

Follow the action shown in the app. If Stripe is reviewing submitted information, there may be nothing to do until the review is complete.

When an invoice can be paid online

An online payment option is available only when all of the following are true:

- The issuing stable or equine business has Pro
- Its Stripe connection is ready and online payments are not paused
- The invoice has been issued and has a remaining balance
- The invoice uses a supported currency
- No open payment issue is blocking collection
- The person starting payment is the billed contact or is using the secure payment link provided for that invoice

An invoice that is still a draft, already closed, missing issuer details, or awaiting review will not offer online payment.

What the client sees

The billed contact can open the invoice and choose the Stripe payment option when it is available.

Aurestra sends the client to Stripe's secure payment experience. After payment begins, the invoice may show that payment is still being confirmed. Do not submit a second payment while the first one is processing.

Stripe's confirmation is authoritative. Aurestra updates the invoice when the payment result is received and reconciled.

Fees

Clients pay the invoice amount. Stripe deducts its payment-processing fees from the business's payment.

Aurestra does not add its own platform or transaction fee to Stripe payments. Stripe's rates vary by country, currency, and payment method, so review Stripe's current pricing for the connected account.

Manual payment records vs Stripe payments

Recording an e-transfer, cash, cheque, or other outside payment in Aurestra updates the operational invoice record. It does not move money through Stripe.

A Stripe payment is different. The payment is processed by Stripe and Aurestra updates the invoice from Stripe's confirmed result.

Keep these two workflows distinct so the payment history accurately explains how money was handled.

Refunds and corrections

Where an eligible Stripe refund action is available, it asks Stripe to return money to the original payment method. Stripe and the resulting webhook confirmation remain authoritative.

An offline refund or correction records money handled outside Stripe. It does not send funds through Stripe. Review the invoice, payment source, amount, and available action carefully before continuing.

Some refunds or financial corrections may require business permission and may not be available for every payment state.

Pause, resume, or disconnect

Pause online payments when you want to stop accepting new online payments temporarily while keeping the Stripe connection available to resume.

Disconnecting is more permanent. It removes Aurestra's connection to that Stripe account, and Stripe may not allow the same account to be connected again. Use pause when you expect to return to online payments later.

An active payment that is still being processed can prevent disconnection until the payment reaches a final state.

Equine businesses billed through a stable

An equine business can choose a connected stable as the invoice issuer where that matches the business setup.

In that case, online payments follow the selected stable's settings and appear as managed by that stable. Save the invoice issuer choice first, then manage the Stripe connection from the stable's billing settings.

Related guides

- Invoices, Payments, and Billing Prep
- Client Balances, Credits, and Deposits
- Set Up an Equine Business
- Set Up Your Stable
- Aurestra Free and Pro

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. Applying an existing credit changes the Aurestra invoice balance but does not create a new Stripe charge or send money to the client.

Refunds and forfeitures

Where supported, a deposit or credit may be refunded through Stripe, settled outside Aurestra, corrected, or forfeited.

An eligible Stripe refund asks Stripe to return money to the original payment method. Stripe and the resulting confirmation remain authoritative.

An offline refund or settlement records money the business handled outside Aurestra. It does not send a Stripe refund. A ledger correction changes Aurestra's operational record without moving money.

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 Stripe setup and payment movement, see Online Payments with Stripe. For boarding setup, see Boarding Packages and Assignments.

Aurestra Free and Pro

Aurestra is free to use indefinitely. Free keeps horses, people, relationships, and day-to-day work connected. Pro adds the financial layer and supports multiple stables and equine businesses with expanded storage.

Current Canadian Pro pricing and regional storefront guidance are included below.

What is included with Free

Aurestra Free includes:

- Unlimited horses
- Horse records, care notes, documents, history, and supported media
- Schedules, tasks, reminders, and recurring activity
- Agreement templates, agreement acceptance, and document history
- Contacts, invitations, ownership records, and connected relationships
- Shared information and activity based on each person's relationships and permissions
- Stable, facility, schedule, and horse operations that are not Pro billing functionality
- Equine business setup, client and stable connections, professional appointments, and applicable coaching and lesson workflows
- Boarding package and assignment operations that do not require paid billing functionality
- One stable
- One equine business
- 250 MB of total account storage

Free does not expire. You can continue using these tools for as long as they meet your needs.

What Pro adds

Aurestra Pro is designed for stable management and equine professionals ready to bring billing and more of their business operations into Aurestra.

Pro includes everything in Free, plus:

- Invoice preparation, review, issuing, and sending
- Billing schedules and invoice timing
- Client balances and business dashboard context
- Deposits, credits, and invoice adjustments
- Payment records and Stripe online payments
- Tax and invoice issuer settings
- Boarding billing policy and invoice functionality
- Part Board billing allocations for eligible monthly boarding assignments

- Multiple stables and equine businesses
- 5 GB of total account storage

These tools still follow the access and permission rules for the relevant stable, business, client, horse, or invoice. A Pro subscription does not give someone access to records they are not otherwise allowed to see.

Agreements and invitations do not require Pro

Foundational agreement and invitation workflows are included with Free. A stable can prepare agreement templates, issue agreements, and keep the resulting document history organized without upgrading solely for those tools.

Access remains relationship- and permission-based. Being connected to a horse or stable does not automatically make every agreement or private record visible to everyone.

Billing and online payments

Pro allows a stable or equine business to prepare and send invoices, manage balances and billing adjustments, and keep payment context connected to the clients, horses, and work behind it.

After a business enables Stripe online payments, clients can pay eligible invoices securely online. Aurestra does not add its own platform or transaction fee to Stripe payments. Stripe's standard payment-processing fees still apply.

Horse owners and other invoice recipients do not need their own Pro subscription to review an invoice or use an online payment option made available by the issuing business.

For setup and payment eligibility, see Online Payments with Stripe.

Aurestra supports operational billing workflows, but it is not intended to replace full accounting software. Continue using the accounting, bookkeeping, tax, payroll, and financial-reporting tools appropriate for your business.

Profile and storage limits

Free includes one stable, one equine business, and 250 MB of total account storage. Pro includes multiple stables and equine businesses and 5 GB of total account storage.

Storage is measured across the media and files connected to your account. Aurestra will show you if you reach a current stable, equine business, or storage limit.

How much is Aurestra Pro?

Founding Member pricing is CA$5.99/month or CA$59.99/year through September 30, 2026. Regular Aurestra Pro pricing begins October 1, 2026 at CA$19.99/month or CA$199.99/year. Canadian pricing shown. Localized App Store and Google Play pricing may vary by region.

Purchases are managed through the App Store or Google Play, where you can review the applicable localized price and subscription terms before subscribing.

How does Founding Member pricing work?

Subscribe by September 30, 2026. Your Founding Member rate stays in place for as long as the subscription remains continuously active. If the subscription ends and you subscribe again later, the current Aurestra Pro price applies.

If something does not match your account

If Aurestra says you need Pro for a foundational Free workflow, or a limit does not match what is described here, contact Aurestra and include the email address on your account and the action you were trying to complete.

FAQ

Does Free expire?

No. Aurestra Free does not expire. It includes unlimited horses, horse records, care notes, documents, schedules, tasks, reminders, recurring activity, foundational agreements, invitations, one stable, and one equine business.

You can continue using Free for as long as it meets your needs.

How much is Aurestra Pro?

Founding Member pricing is CA$5.99/month or CA$59.99/year through September 30, 2026. Regular Aurestra Pro pricing begins October 1, 2026 at CA$19.99/month or CA$199.99/year. Canadian pricing shown. Localized App Store and Google Play pricing may vary by region.

Purchases are managed through the App Store or Google Play, where you can review the applicable localized price and subscription terms before subscribing.

How does Founding Member pricing work?

Subscribe by September 30, 2026. Your Founding Member rate stays in place for as long as the subscription remains continuously active. If the subscription ends and you subscribe again later, the current Aurestra Pro price applies.

What does Pro unlock?

Aurestra Pro is designed for stable management and equine professionals who want the financial work connected to the horses, clients, boarding, lessons, appointments, and services behind it. It adds invoicing, billing schedules, client balances, deposits, credits, adjustments, payment records, Stripe online payments, tax and invoice issuer settings, boarding and Part Board billing, multiple stables and equine businesses, and expanded account storage.

The usual relationship and permission rules still apply. Pro does not give someone access to a stable, horse, client, agreement, or invoice they are not otherwise allowed to see.

Do I need Pro to use agreements, reminders, or recurring tasks?

No. Foundational agreement templates and document history, reminders, recurring activity, invitations, ownership records, and connected relationships are included with Free.

Some actions still require the appropriate role, relationship, or permission. That is an access requirement, not a Pro requirement.

Do horse owners, boarders, or clients need Pro to participate in shared Aurestra workflows?

No. People can participate in connected horse records, schedules, agreements, appointments, invoices, and other shared activity based on their relationships and permissions without subscribing to Pro. A stable or equine business uses Pro for the financial layer, including creating and managing invoices and enabling Stripe online payments, as well as multiple stables and equine businesses and expanded storage.

Does Aurestra charge an additional percentage on Stripe payments?

No. Aurestra does not add a platform or transaction fee to Stripe payments. Stripe's standard payment-processing fees still apply.

How do I turn on Stripe online payments?

The manager of an Aurestra Pro stable or equine business can open its billing settings and choose **Online payments**. From there, set up a new Stripe account or connect an eligible existing account, complete Stripe's required business and banking details, and return to Aurestra to check the status.

The connection must show as ready before eligible invoices can be paid online. See Online Payments with Stripe.

Why does an invoice not show online payment?

The invoice must be issued, have a remaining balance in a supported currency, and use an issuing business whose Stripe connection is ready and not paused. The person starting payment must also be the billed contact or use the secure payment link provided for that invoice.

Draft, closed, unsupported, or review-blocked invoices do not offer online payment.

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. An eligible Stripe refund asks Stripe to return money to the original payment method. An offline refund, settlement, or correction records something handled outside Stripe and does not move money through Stripe. 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 is connected to a coaching profile and can include client, horse, lesson time, enrollment, or reservation context. A professional appointment connects an equine business to a client, stable, horse, and service work.

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, Service Appointments and Lessons, and Care Records and Tasks.

Can equine professionals manage appointments for several barns?

Yes. An equine business can manage its own clients and active connections with multiple stables. A professional appointment can use a client, a connected stable, or a standalone context, and can contain separate service items for the horses involved.

Each stable connection and horse remains subject to its own relationship and access rules. See Set Up an Equine Business.

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.

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.

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, stable management, an owner, a boarder, an equine professional, or an 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, professional/client relationship, invitation, booking, invoice, or agreement.

Permissions affect what a person can view or manage. Invitations, contacts, boarders, ownership records, and foundational agreement workflows are available on Free, but each person still needs the appropriate relationship and permission for the record involved.

Agreement access is narrower than ordinary horse access. The named parties and authorized management for the issuing stable can access the document through the supported workflow. See Agreements and Boarding Onboarding.

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@aurestra.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 for current instructions. If you need help, contact us from the email address associated with your account.