



HOW-TO MANUAL

Every “how do I...?” answered.

122 step-by-step answers across 18 areas of Kingly — the same library that powers the in-app Help Center and Ask Kingly. Trainers and assistants: keep this in the truck.

CONTENTS

Find your question

01	Getting started	8 answers · Create your barn, run the quick setup, and send your first invoice the same day.
02	Horses & owners	6 answers · Every horse carries its owner, contact info, feed plan, papers and photo.
03	Shows, planner & whiteboard	19 answers · Enroll horses, plan the classes, and run the crew from the live whiteboard.
04	Services & charges	5 answers · A priced catalog so every lunge, band and med is logged in two taps — or by voice.
05	Invoices	13 answers · One itemized invoice per owner per show, monthly board billing, custom invoices.
06	Getting paid	8 answers · Card, Link and bank payments straight to your account — owners cover the fee.
07	Books & expenses	13 answers · Payments, payouts, receipts, mileage, per-show P&L and 1099s — done as you go.
08	Vet records	4 answers · Coggins, vaccines, dewormers and dentals per horse, with expiration alerts.
09	Feed & packing	4 answers · Per-horse feed plans that turn into a show packing list and a fair feed bill.
10	Hauling & stall cards	3 answers · Miles computed from the address and billed per horse; printable 4×6 stall cards.
11	Messaging	5 answers · Private barn chat with photos, reactions, read receipts and typing indicators.
12	Team & roles	3 answers · Invite assistants with a code; they see the work, never the money.
13	Owner portal	4 answers · Each owner gets a private link: invoices, payments, vet records, card on file.
14	Schedules, results & points	3 answers · Class schedules and draws, results by class, season points, shareable result pages.
15	Notifications & your phone	5 answers · Install Kingly like an app, get push and text alerts, swipe back like native.
16	Sharing & referrals	2 answers · Share invoices, results and Kingly itself — and get thanked when a barn joins.
17	Account & security	6 answers · Barn profile, logo, timezone, passwords, sign-in protection.
18	Collegiate teams	11 answers · Ride boards by discipline, athlete My Rides, pre/post-ride checklists, whiteboard, questions and team chat.

01 · GETTING STARTED

Create your barn, run the quick setup, and send your first invoice the same day.

How do I create my barn and get started?

1. Go to kinglyequine.com and tap Create my barn (or Start free). Enter your name, email, phone and a password.
2. You land in the 2-minute setup wizard: barn name and phone → paste your horse names one per line → tick the services you charge for and adjust prices → optionally add your first show.
3. Tap Text me the app link on the last step so you can install Kingly on your phone.
4. Your dashboard opens with an onboarding checklist — follow it top to bottom.

Tip — You can re-run the quick setup any time from the dashboard checklist (Run the 2-minute quick setup).

Tip — Nothing to install and no card required — founding barns run the full product free.

How do I look at the demo barn before I commit?

1. On kinglyequine.com tap Try the live demo — no sign-up. You're dropped into a read-only demo barn with horses, a show, a live whiteboard and paid invoices.
2. Tap anything: the whiteboard, an invoice, Books, Messages. Changes are blocked, so you can't break it.
3. When you're ready, tap Create your barn free in the yellow banner at the top.

How is Kingly laid out? Where did everything go?

1. Kingly has five sections: Today · Shows · Horses · Chat · More. On a phone they're the bottom tabs; on a laptop they're the left menu with their sub-items shown.
2. Today — your home: the live show card, quick links, what needs you, and upcoming shows.
3. Shows — every show, and inside each one the Show Day / Horses / Money areas.
4. Horses — every horse's record, owner, papers, videos, and Vet & meds underneath it.
5. Chat — barn messaging.
6. More (phone) / the lower menu (laptop) — Money (Invoices, Expenses, Books, Services & prices, Providers), Team & Settings, and Help. Assistants don't see Money.
7. Old bookmarks still work: the dashboard, vet records, accounting and every show tab link open the same thing in its new place.

Tip — Words changed too: the Tasks tab is now Whiteboard, Accounting is Books, Horse Shows is Shows, Assistants is Team.

What does everything on Today mean?

1. Show Day card — the top card jumps to today's live show and shows the whiteboard progress (4/31 done), the next class and draw, and the next med time. Before a show it counts down to it.
2. Quick links — four tiles (Whiteboard, Horses, Invoices, Books, Vet & meds, Chat). They drift toward what you tap most on this device.
3. Needs you — at most three cards ranked by urgency: Outstanding (who owes), Awaiting review (drafts to approve), Approved queue (ready to send), Vet expiring, Next payout. Cards you open most float up.
4. Set up — one card at a time until it's done: connect payments, invite your assistants, finish the checklist, share Kingly.
5. Upcoming shows and Scan a receipt sit underneath.
6. Assistants see the same Today without the money cards; the subtitle spells out what they can and can't see.

How do I find a horse, show, owner or invoice fast?

1. Tap the magnifying glass in the header on any screen (or press Ctrl/⌘ K on a laptop).
2. Type two or more letters. Results group into Horses, Shows, Owners and Invoices.
3. Tap a result: a horse opens its record, a show opens the show, an owner opens their account statement, an invoice opens its review sheet.
4. Assistants can search horses and shows; owners and invoices only appear for trainers and bookkeepers.

What's the fastest path to my first invoice?

1. Add your horses with their owner's name and phone (Horses → Add horse).
2. Create a show and enroll the horses (Shows → Add show → open it → Horses tab → Enroll horses).
3. During the show, log services per horse in two taps (or by voice). Kingly builds one invoice per owner as you go.
4. When the show ends, open the dashboard: Awaiting review → Review & approve → Send all.
5. Owners get a text and an email with the itemized PDF and a pay link.

How do I put Kingly on my phone like an app?

1. iPhone: open kinglyequine.com in Safari → tap the Share icon → Add to Home Screen → Add.
2. Android: open it in Chrome → tap the ≡ menu → Install app (or Add to Home screen).
3. Open Kingly from the new icon. It runs full-screen, remembers your login for 60 days, and can receive push notifications.
4. Turn on notifications: Team & Settings → Notifications → toggle this device on and tap Send test notification.

Tip — On iPhone, notifications only work after you add Kingly to the home screen.

Tip — The setup wizard can text you the link so you don't have to type it.

I'm an assistant — where do I start?

1. Your trainer gives you an invite code. Register with it at kinglyequine.com → Sign in → Join a barn with an invite code.
2. The first time you sign in, a 4-slide tour explains your role, the whiteboard, reminders and quick logging.
3. Your daily home is the current show's Whiteboard (Show Day → Whiteboard). Check off work, log services, and watch for texted reminders.
4. Replay the tour any time from Help.

02 · HORSES & OWNERS

Every horse carries its owner, contact info, feed plan, papers and photo.

How do I add a horse?

1. Go to Horses and tap Add horse (on a phone, the round + button bottom-right).
2. Enter the barn name (what you call the horse) and the registered name.
3. Pick the owner from the list or type a new owner name, then add the owner's phone, email and billing email – invoices and pay links go there automatically.
4. Optional: photo, registration papers, notes and the feed plan.
5. Tap Save.

Tip – Barn name shows on the whiteboard and invoices; registered name shows on results and stall cards.

Tip – Add many horses at once by pasting names in the setup wizard.

How do I set who owns a horse and where their invoices go?

1. Open the horse (Horses → tap the horse) and look at the Owner section.
2. Owner name – pick an existing owner so their horses bill together, or type a new one.
3. Owner phone receives invoice texts; owner email (or a separate billing email) receives the PDF and pay link.
4. Owner address prints on the invoice. Save – every future invoice for this horse uses these details.

Tip – Changing the phone/email on the horse updates where the next invoice goes; already-sent invoices keep their original delivery record.

How do I add a photo or registration papers to a horse?

1. Open the horse and tap the photo circle to take or choose a picture.
2. Under Registration papers tap Add and upload the PDF or photo of the papers.
3. Papers open from the horse card at check-in and are available in the owner's portal.

How do I edit or remove a horse?

1. Horses → tap the horse to open it, change anything, Save.
2. To remove a horse, open it and tap Delete at the bottom. Its past invoices and records stay in your history.

How do I find a horse or owner quickly?

1. Horses lists every horse alphabetically with the owner underneath – scroll or use your browser's find.
2. Owner-related tools (portals, stall cards) are the buttons at the top of the Horses page.

Where can I see everything the vet has done for one horse?

1. Horses → tap the stethoscope icon on the horse's row. You get the full vet timeline – injections (with every joint), vaccines, worming, Coggins, health papers and x-rays, newest first, with the attached photos and PDFs right there.
2. Tap Add vet record in the dialog to log something new for that horse.
3. Owners see the same timeline for each of their horses in the owner portal (Vet records tab) – with attachments, minus your costs.

03 · SHOWS, PLANNER & WHITEBOARD

Enroll horses, plan the classes, and run the crew from the live whiteboard.

How do I create a show?

1. Shows → Add show.
2. Name, location (type the venue address – it powers hauling miles), start and end dates, and the show's timezone.
3. Save. Then open the show and go to the Horses tab to enroll horses.

Tip – The timezone matters: task reminders and med alerts fire in the show's local time.

How do I add horses to a show?

1. Open the show → Horses tab → Enroll horses.
2. Tick every horse going, then Confirm. Each enrolled horse gets its own services list and owner invoice.
3. Enroll late arrivals the same way – hauling and split expenses set to "all horses" pick them up automatically.

What are the areas inside a show?

1. A show has three areas – pick one with the switch at the top, then a pill underneath. Kingly remembers where you were.
2. Show Day → Whiteboard (the live to-do board), Planner (classes, draws, results), Results, Feed, Braids, Packing.
3. Horses → who's enrolled, every service logged for each, papers pack and stall cards. Each horse row has Send the bill once it has charges.
4. Money (trainers only) → Invoices (one group per owner with Send the bill), Expenses, Providers.

How does the whiteboard work?

1. Open the show → Show Day → Whiteboard. Horses run down the left, tasks (Lunge, Ride, Bute, Dex, Wrap...) across the top, one column per show day.
2. Tap the big box where a horse and task meet to check it off – just like the dry-erase board. Everyone's phone updates instantly, and a small Undo appears for a few seconds if you tapped the wrong one.
3. On a phone choose By horse (one card per horse, its name stays pinned while you scroll) or By task (one card per task, every horse as a row). Kingly remembers your choice.
4. The red Next med strip shows the soonest medication still to give today and how many are left; Up next lists the day's timed tasks.
5. Under each check: the assignee circle (who's doing it) and the time chip (when). The day strip opens on today while the show is live; "Only mine" dims everything not assigned to you.

Tip – Show-day mode (the expand icon) gives the crew giant tap targets at the ring.

Tip – Timeline view lists the day's timed tasks in order.

What is the Home barn whiteboard?

1. Shows → the dark Home barn card at the top. It's the everyday whiteboard for every horse in the barn – every day of the year, no show needed.
2. Same columns as a show whiteboard (Lunge, Ride, Bute, Dex...), same reps, assignees and times. The strip shows two weeks at a time: < > step a week, Today jumps back, or pick any date.
3. Checking a task that's linked to a service logs its price right away – the toast says "added to the horse's monthly bill". Unchecking takes it back off.
4. On the 1st, last month's home charges land on the owner's bill in arrears: as grouped lines on their recurring monthly invoice when they have one, otherwise as a draft called "Home barn · September". Review and send it from Invoices like any other bill.
5. Trainers see "Home charges waiting to be billed" above the board – per owner, with Bill now to pull the charges onto a draft early. Assistants can check boxes but never see prices.
6. Daily routines (trainers): tap Daily routines above the board, pick a horse, tick the tasks it gets, choose the weekdays, an optional time and who does it. Those boxes pre-fill – unchecked – for today and the next two weeks; change the routine and the days ahead rebuild (checked boxes are never touched).

Tip – Link a task to a service in Manage tasks so its checks bill; tasks without a link still track but cost nothing.

Tip – A horse added to the barn appears on the home board automatically – there's nothing to enroll.

Tip – Give a routine task a time and the assignee gets the usual 15-minute reminder text.

How do I assign a task to someone and give it a time?

1. On the whiteboard, tap the small circle under a task's check box and pick a teammate. They get a text (or push) immediately: "Lunge Casper, Ring 3, 6:15 AM".
2. Tap the clock chip to set a time: choose Exact time (7:30 AM) or a free-form note ("after lunch").
3. Exact times fire a reminder text 15 minutes before to the assignee – or to the trainer if it's unassigned.

Tip – Clear an assignment from the same circle menu.

How do I do a task more than once a day (lunge twice, meds AM and PM)?

1. On the whiteboard find the horse's task box and tap + again underneath it. A second rep appears, labelled 1/2 and 2/2.
2. Each rep has its own check mark, assignee and time – set 7:00 AM on rep 1 and 7:00 PM on rep 2. Each fires its own reminder.
3. To remove an extra rep, uncheck it and tap the small × beside it. Every task keeps at least one rep.
4. If the task is linked to a service (Manage tasks → Bills as), every checked rep adds one charge to the horse's invoice.

How do I add my own tasks to the whiteboard columns?

1. On the whiteboard tap Manage tasks.
2. Type a task name (Braid, Bath, Ice, Turnout...) and tap Add. It becomes a column on every show's whiteboard.
3. Trainers can set Bills as → pick a service from your catalog. From then on, each check-off of that task bills the horse at that service's price.
4. Delete a task type with the trash icon; past check-offs and charges stay.

Tip – Quick-add during a show with the small "+ task" field at the top of the board.

How do I use Show-day mode at the ring?

1. On the whiteboard tap the expand icon (Show-day mode). The screen goes dark with huge chips per horse and task.
2. Tap a chip to check it off; each rep of a task is its own chip with its time. Use the arrows to change day and the Only mine switch to see just your work.
3. Tap the mic to log by voice. Tap Exit (or swipe back) to return to the board.

How do I log work by voice?

1. On the whiteboard (or in Show-day mode) tap the gold mic and talk: "Drew lunged, done. Banded Sassy and Cody. Bute on Rio."
2. Kingly transcribes it, shows you a preview of the tasks it will check and the services it will log, and lets you fix anything before you apply.
3. Voice check-offs land on the first unchecked rep of a task; voiced services bill at your catalog prices.

Tip – Speak barn names exactly as they appear on the board. Background noise is fine; hold the phone close.

How do med time alerts work?

1. Turn on Med alerts in Team & Settings → Notifications.
2. Put your med tasks (Bute, Dex, Banamine...) on the whiteboard with exact times. Kingly texts the assignee 15 minutes before, and lists upcoming meds on the Show-day page.
3. Add AM and PM reps for twice-a-day meds so each one gets its own alert.

How do I plan the class schedule for a show?

1. Open the show → Planner. Pick the day, then Add class: class name/number, estimated time, and which horses show in it.
2. Or tap the mic and say it: "Friday, class 42 junior western pleasure at 9, Drew and Sassy." Kingly builds the entries for you to confirm.
3. The planner drives the Show-day page (today's classes in order) and, when class times are known, your morning rundown.

Tip – Kingly remembers the classes each horse usually shows in – say "usual classes" and it fills them.

How do I hide classes none of my horses are in?

1. Open the show → Show Day → Planner and tap My horses only. Classes with none of your horses disappear and the button tells you how many are hidden.
2. The day strip opens on today while the show is live. Tap any class card for its full name, your horses' draws and splits, and the full draw list or results.

What is the Show Day page?

1. Today → Show Day Mode (or /show-day). It's today's live rundown: next classes with times and horses, upcoming reminders, med times, and buttons to the whiteboard and planner.
2. It only shows when a show is running today in its timezone; otherwise it tells you the next show.

How do I make a braiding or banding list for my braider?

1. Open the show and tap the Braids tab, then New list (or Create a braiding list). Name it, e.g. "Friday PM Braids", and pick the default type – Braiding or Banding.
2. Tap Add horses and tick the horses from your barn roster. Tick which day(s) of the show each one shows, then Add. You don't need classes entered first – the list pulls from your whole roster.
3. For each horse set Braid or Band, Mane / Tail / Both, and a short note like "small hunter braids" or "yellow bands".
4. Add the braider's name and phone (pick a saved provider or type one), a note for the whole list, and tap Save.

Tip – Horses already entered in classes show an "entered" tag and a Select-all-entered shortcut – but you can add any horse.

Tip – Keep several lists per show (Thursday PM, Saturday AM) with New list.

How do I put a horse on the braiding list for more than one day?

1. When you tap Add horses, tick the horse and then tick every day of the show it needs done – Kingly adds it to each of those days.
2. Already added a horse? Open that row's day menu to move it, or tap the copy icon on the row to duplicate it to another day.
3. Each day is its own section, so your braider sees exactly which horses to do each morning.

How do I send the braiding list to my braider?

1. Save the list first, then pick how to send it: Send text (they get a link to a mobile checklist – no login needed), PDF (a printable barn-aisle sheet), or Copy to paste into any text or email.
2. The braider opens the link and ticks each horse off as they finish; the progress bar on your own list fills as they go.

Tip – Texting uses your barn's number and the braider needs no account.

Tip – Set the braider once as a service provider and pick them from the list next time.

Can I build the braiding list before I've entered classes?

1. Yes. The Braids tab pulls from your barn roster, not from class entries, so you can build and send it the night before – before any schedule or entries exist.
2. If entries do come in later, entered horses get an "entered" tag and a Select-all-entered shortcut to save you taps.

How do I print every horse's Coggins and health papers for the show office?

1. Open the show → Horses tab. The Papers for the show office card shows how many entered horses have a current Coggins and health paper attached, and lists anything missing or expiring before the show ends.
2. Tap Download papers pack (PDF) – one file with a cover sheet and every horse's papers in order, ready to print or email ahead.
3. Anything marked No record / No copy attached: open Vet records for that horse and attach the paperwork, then download again.

04 · SERVICES & CHARGES

A priced catalog so every lunge, band and med is logged in two taps — or by voice.

How do I set up my services and prices?

1. Services → Add service.
2. Name it (Lunging, Banding, Day fee, Braiding, Hauling...), set the price, and choose Fixed (per time) or Per day (charged for each day of the show).
3. Save. Assistants pick from this list and the price is applied automatically — they never see or change prices.

Tip — The setup wizard pre-loads 17 common services; edit prices any time.

Tip — Per-day services (day care, stall) multiply by the show's days automatically.

How do I log a charge for a horse at a show?

1. Open the show → Horses tab → find the horse → Log service (or the Log service button on the whiteboard header).
2. Pick the service, set the quantity (2 lunges, 3 bands), and Save. It's on the owner's draft invoice instantly.
3. Trainers can override price and add a note; assistants get the catalog price automatically.

How do I log the same service for many horses at once?

1. Open the show → Horses tab → Log for several horses.
2. Pick the service (Banding), then tick every horse you did it for, set quantity, Save. One entry per horse is created — each on the right owner's invoice.

How do I fix or remove a logged charge?

1. Show → Horses tab → the horse's list of services. Tap a line to change quantity, price or provider; use the trash icon to delete.
2. Charges created by whiteboard check-offs show a "whiteboard · day N" tag — unchecking the rep removes the charge too.

How do I track farriers, vets and braiders (service providers)?

1. Providers → Add provider: name, phone, email, Venmo/PayPal, notes.
2. On a show → Providers tab, assign providers to the show; when you log a service you can pick who performed it.
3. Provider reports and what you owe each one live in Books → Provider payouts; 1099 totals in Tax info.

05 · INVOICES

One itemized invoice per owner per show, monthly board billing, custom invoices.

How are show invoices built?

1. Every service, feed charge, split expense and hauling line you log during a show is grouped by owner. One invoice per owner per show, broken down per horse inside.
2. They sit as Drafts on the dashboard (Awaiting review) until you approve them — you can edit any line before approving.
3. Show → Invoices tab shows each owner's group with a live status badge: Draft, Approved, Sent, Paid.

How do I pre-bill owners before a show?

1. Invoices → Pre-bill a show. Pick the show, tick the owners (or Pre-bill everyone), type the flat amount per owner and an optional due date.
2. Kingly drafts one PRE-BILL invoice per owner. Approve and send them like any invoice — owners can pay online or you record a check.
3. When an owner pays the pre-bill, that money is applied to their final invoice for the show automatically (the final shows 'Pre-bill payment' and the lower balance). If they never pay it, the final invoice shows the full charges and the unpaid pre-bill is voided the moment you send the final.
4. Pre-billed more than the charges came to? The final invoice shows a credit balance (e.g. -\$80) and that credit rolls onto the owner's next invoice.
5. Kingly remembers the last amount you used per show.

How do owner accounts, previous balances and credits work?

1. Invoices → Owner accounts lists every owner with their running balance: red = they owe, green = they have credit. Tap an owner for the full statement with a running balance.
2. Every approved or sent invoice adds to the account; every payment reduces it (drafts don't count). Whatever is left carries onto the owner's NEXT invoice automatically — shown as 'Previous balance' when they still owe on earlier invoices, or 'Credit on account' when they overpaid or pre-paid. 'Amount due now' is the net.
3. Paying from the newest invoice's link covers the whole account: Kingly applies the money to this invoice, then older open invoices (oldest first), and keeps any extra as credit. Record a payment does the same when you type more than the invoice balance.
4. Add credit / charge on a statement for goodwill credits, write-offs or an opening balance from your old system.

How do I review and approve invoices after a show?

1. Today → Awaiting review → Review & approve.
2. The PDF opens exactly as the owner will see it. Approve moves to the next one; Skip leaves it as a draft.
3. Approved invoices move to the Approved queue — tap Send all to text and email every owner at once.

Tip — Need to change a line? Open the invoice from Invoices while it's a draft or approved and edit quantities, prices or notes.

How do I send an invoice to an owner?

1. Invoices → tick one or more → Send. Choose Text, Email or both.
2. Texts come from your barn name; emails arrive as "Your Barn via Kingly" with the PDF attached and a Pay button. Turn on CC me in Team & Settings → Notifications to get a copy.
3. Delivery is tracked per invoice (sent, delivered, opened, bounced) with a Resend button if anything fails.

How do I create a one-off (custom) invoice?

1. Invoices → New invoice.
2. Pick the owner (or New owner), add line items with quantity and price, set a due date and notes, Save.
3. Approve and send it like any other invoice — it gets the same pay link.

How do I bill monthly board or training automatically?

1. Invoices → Recurring tab → New recurring invoice.
2. Pick the horse and owner, add the lines (Board \$850, Training \$1,200...), choose the day of month, start date, and whether to prorate mid-month arrivals.
3. Kingly generates and sends the invoice every month on that day. Toggle Active off to pause; the MRR card shows your monthly total.

How do I record a check, cash or Venmo payment?

1. Invoices → find the invoice → Record payment.
2. Choose Full, Half or type the amount; pick the method (check, cash, Venmo, Zelle...), date, reference and a note. Confirm.
3. The invoice shows the balance or turns Paid, and the payment appears in Books → Payments received.

How do I preview, download or send an invoice?

1. Invoices → the PDF icon on any row opens the branded PDF in a new tab (print or save from there).
2. Send the bill — the gold button on a horse row or an owner group inside a show (Horses or Money area) — opens the review sheet and texts or emails the owner with the PDF and a Pay button.
3. Share link creates a private read-only web page for that owner; copy it or text it. It always shows the live balance.

How do I see which invoices are overdue or getting old?

1. Invoices → each sent, unpaid row carries a chip: red Overdue Nd once the due date passes, amber Nd out after it has been out a week.
2. Invoices → Owner accounts shows every owner with their horses, running balance and open invoices — tap one for the full statement.
3. Books → Outstanding gives the aged receivables report (who owes what, for how long).

What do the invoice statuses mean?

1. Draft — built automatically, not yet approved; editable.
2. Approved — reviewed by you, waiting to be sent.
3. Sent — delivered by text/email with a pay link; delivery status is tracked.
4. Partially paid — some money in, balance still due.
5. Paid — settled online or recorded manually. Void — cancelled, kept for history.

How do I remind owners about unpaid invoices?

1. Team & Settings → Notifications → Weekly payment reminders: turn on and pick the day and hour.
2. Every week Kingly texts owners with an open balance a friendly reminder with their pay link, and logs it so you know who was nudged.
3. Nudge one owner right now from Invoices → Send (text) again.

Can I edit an invoice before it goes out?

1. Yes — open it from Invoices while it's Draft or Approved. Change quantities, prices, add or remove lines, adjust notes, then Save; the PDF regenerates.
2. Once Sent, record adjustments as a new custom invoice or a credit line rather than editing history.

06 · GETTING PAID

Card, Link and bank payments straight to your account — owners cover the fee.

How do I set up online payments (Stripe)?

1. Team & Settings → Billing → Connect Stripe (or Finish payment setup on the dashboard).
2. Stripe walks you through identity and bank details — about 5 minutes. Kingly never sees your bank login.
3. When the badge shows Connected, every invoice pay link accepts card, Link and bank payments and the money goes to your account.

Tip — Come back to Team & Settings → Billing → Manage in Stripe any time to update your bank or view Stripe's own dashboard.

What can owners pay with, and who pays the fees?

1. Card (Visa, Mastercard, Amex...), Link (Apple Pay / Google Pay / saved details) and ACH bank transfer.
2. Processing plus Kingly's flat \$4 are added on the owner's side, so a \$1,000 invoice puts \$1,000 in your account. Bank payments carry the lowest processing cost.
3. Kingly never holds your money — Stripe pays out straight to your bank on Stripe's schedule.

What does the owner see when they pay?

1. Their text/email opens a private invoice page with the itemized charges and a Pay button showing the exact amount due.
2. They choose card, Link or bank; the fee is shown clearly before paying. Paid invoices show a receipt and the balance updates live.
3. Bank payments take a few business days to clear — the invoice shows "Payment pending" until then.

How do I let owners pay part of an invoice?

1. Team & Settings → Billing → Partial payments: turn on and set a minimum amount.
2. The pay page then lets owners type any amount at or above the minimum; the invoice tracks the remaining balance.

When does the money reach my bank? (Payouts)

1. Team & Settings → Billing → Payouts shows available and pending balances, the next payout date and amount, recent payouts and each payment's status.
2. The dashboard's Next payout tile shows the same at a glance.
3. Turn on Payout texts to get an SMS the morning a payout lands in your bank.
4. Each payout is booked automatically as a line in Books → Bank deposits.

An owner's payment failed — what now?

1. Kingly explains failures in plain English on the pay page (card declined, bank rejected, limit exceeded) and lets the owner retry or choose another method.
2. You'll see the failed attempt on the invoice and in Books → Payments received. Nothing is charged twice — every pay link is protected against double payment.

How do I charge an owner's saved card?

1. Owners save a card from their portal (Horses → Owner portals → send the link). Once a card is on file, open the invoice and choose Charge saved card.
2. The owner gets an emailed receipt automatically and the payment lands in Books.

Can Kingly text me when an owner pays?

1. Team & Settings → Notifications → Payment texts: you get an SMS the moment an online payment lands.
2. Thank-you texts: the owner receives a thank-you SMS with their receipt automatically.

07 · BOOKS & EXPENSES

Payments, payouts, receipts, mileage, per-show P&L and 1099s — done as you go.

What's in Books?

1. Register — every dollar in and out with a running balance; categorize right in the row.
2. Bank — import your bank's CSV statement, then Match / Add / Exclude each line, QuickBooks-style.
3. Reconcile — type the statement's ending balance and Kingly tells you if it matches to the penny.
4. P&L — income and expenses by category (Schedule C ready) for any period, with a CSV for your CPA.
5. Payments received — every online and recorded payment, who paid, for what. Online payments read "Horse · Show · Month" instead of a Stripe code.
6. Bank deposits — each Stripe payout with the payments inside it.
7. Payments made — what you've paid providers and vendors.
8. Income — revenue by period and by show; Outstanding — aged receivables (who owes what, how long).
9. Provider payouts — balances owed to each farrier/vet/braider; Tax info — 1099s, W-9s, documents and the year summary.
10. Every table exports to CSV for your accountant.

How do I categorize transactions in the Register?

1. Books → Register. Every payment received and payment made is one row, oldest at the bottom, newest on top, with a running balance.
2. Pick a category in the row's dropdown — it saves instantly. Rows with no category are tinted amber; the "Uncategorized only" button shows just those.
3. Filter by account, money in/out, bank status (C = matched to bank, R = reconciled), date range or search. CSV exports the view.
4. Rename or add categories under the Categories tab — they're pre-mapped to Schedule C lines.

How do I import my bank statement and match it?

1. Books → Bank → Add bank account (name, bank, last 4, and the opening balance from your first statement).
2. Download a CSV from your bank's website, tap Import statement, choose the account and the file. Kingly detects the Date / Description / Amount columns — fix any that look wrong and tick "Flip signs" if deposits show negative.
3. Each bank line lands in For review. Match links it to a payment Kingly already recorded (it suggests the best one by amount and date). Add creates a new income or expense from the line with a category. Exclude hides transfers and personal items.
4. Lines you've already imported are skipped automatically, so re-uploading an overlapping statement is safe. Undo puts any line back in review.
5. Kingly remembers the category you pick for each payee (Chevron → Hauling & fuel, your farrier → Farrier). Next statement, those lines show a purple Remembered badge with a one-tap "Add as ..." button and the Add form comes pre-filled; "Add N remembered" files them all at once (lines that might match an existing payment are left for you). Categorizing a bank-imported row later in the Register teaches it too. Open "Kingly remembers N payees" under the list to forget a wrong one.

How do I reconcile with my bank statement?

1. Books → Reconcile. Pick the account, the statement end date and type the ending balance printed on the statement.
2. Kingly adds up every matched or added bank line through that date and shows the difference. Zero = you match to the penny; tap Finish reconcile.
3. Off by some amount? It tells you how many lines are still in review — match or add them under Bank, then come back. Finish anyway records the difference if you truly can't find it.
4. Reconciled rows show R in the Register and can't be changed until you undo the reconciliation (only the most recent one can be undone).

How do I run a Profit & Loss for my CPA?

1. Books → P&L. Pick a preset (This year, Last year, a quarter) or type dates.
2. Income and expenses are totaled by category with a column per month; each category shows its Schedule C line.
3. A yellow note warns about uncategorized transactions — fix them in the Register so the report lines up with your tax return.
4. CSV for your CPA downloads the whole table.

Can my CPA or bookkeeper have their own login?

1. Team & Settings → Team → Add team member → choose Bookkeeper.
2. A Bookkeeper sees only Books (register, bank, reconcile, P&L, payments, tax) and Help — no horses, shows, whiteboard, invoices or messages.
3. Any Trainer can add or remove a Bookkeeper and reset their password.

How do I see profit per show?

1. Open the show → the P&L card at the top of the Expenses tab shows income (invoiced/paid), expenses and margin for that show.
2. Show expenses, split expenses, hauling and receipts you mark "count toward this show" all feed it automatically.

How do I scan a receipt?

1. Expenses → Receipts → Scan receipt (or Scan a receipt on the dashboard). Take a photo or upload.
2. AI reads the vendor, date, amount and category. Check them and Save.
3. Billable? Tick Bill to a show, pick the horses — one horse gets the full charge, several get an exact split — and it lands on the owners' invoices. Not billable? Optionally count it toward a show's P&L.

How do I split a shared expense (shavings, supplies) across horses?

1. Expenses → Show expenses → Split expense (or Show → Expenses tab).
2. Describe it, enter the total, pick the show and tick the horses that share it (or all horses). Kingly splits to the penny and adds a line to each owner's invoice.

How do I track mileage?

1. Expenses → Mileage lists every trip. Hauling you set up on a show is logged automatically; add other trips manually with vehicle, date and miles.
2. Export the log as CSV for your tax preparer. Kingly tracks miles only — no tax advice.

How do I handle 1099s and W-9s for contractors?

1. Books → Tax info: the 1099 tracker totals what you paid each provider this year and flags anyone over \$600.
2. Upload each provider's W-9 (PDF or photo) and mark when the 1099 was sent. Keep other tax documents in the same place.

How do I record paying a farrier or vet?

1. Books → Provider payouts shows the balance owed to each provider from logged services. Tap Record payment, enter amount, method and date.
2. It appears under Payments made and reduces the balance; the year's total feeds the 1099 tracker.

How do I see who still owes me?

1. Books → Outstanding lists every open balance by owner with aging (current, 30, 60, 90+ days) and totals.
2. The dashboard Outstanding card shows the grand total; tap it to jump to the list.

08 · VET RECORDS

Coggins, vaccines, dewormers and dentals per horse, with expiration alerts.

How do I add a vet record?

1. Vet records → New record.
2. Pick the horse and type (vaccine, Coggins, health paper, X-ray / imaging, dewormer, injection, other), the date, next due / expiration, dose, cost and notes. For a joint injection tap every joint that was done (L/R hocks, stifles, fetlocks... or type a custom one) — one record covers all of them.
3. Attach x-rays, the Coggins, health papers or any paperwork with Add photos or PDF (up to 10 files per record — pick from your photo library or Files, PDFs welcome) or Take photo to snap it with the camera, then Save.

How do I log a vaccine or Coggins for many horses at once?

1. Vet records → New record → tap Several horses and tick everyone who got it.
2. Fill the shared details once; Kingly creates one record per horse. Edit any single record afterwards.

How do I know when a Coggins or vaccine is about to expire?

1. The Expiring soon widget and the stat cards at the top of Vet records show expired and expiring-within-30-days items.
2. Turn on Vet reminders in Team & Settings → Notifications and every trainer gets a weekly text listing what's due.

How do I find a horse's vet history or show it at check-in?

1. Vet records → filter by horse (and type). Open a record to view the attached document.
2. Owners see the same history in their portal and can add records for their own horse.

09 · FEED & PACKING

Per-horse feed plans that turn into a show packing list and a fair feed bill.

How do I set a horse's feed plan?

1. Horses → open the horse → Feed. Add items: hay (type, flakes/bales), grain (product, lbs), supplements and medicines with amount and frequency.
2. Set feedings per day. The plan prints on the stall card and drives the packing list and feed bill.

Where do I set barn-wide feed defaults?

1. Settings → Feed defaults: bales per feeding, feedings per day, grain lbs, and whether hay/grain are supplied from home.
2. Horses without their own plan use these numbers.

How do I get a packing list for the trailer?

1. Open the show → Packing. Kingly totals hay, grain, shavings, supplements and meds for every enrolled horse across the show's days.
2. Tap Print for a checklist you can hang in the trailer.

How do I bill hay and feed fairly after a show?

1. Show → Feed shows the estimate per horse. After the show enter what was actually used; Kingly reconciles proportionally per horse and adds the feed line to each owner's invoice.

10 · HAULING & STALL CARDS

Miles computed from the address and billed per horse; printable 4×6 stall cards.

How do I bill hauling by the mile?

1. Open the show → Expenses → Hauling → Set up hauling.
2. Enter origin (your barn) and destination (the show) and tap Calculate – miles are computed from the addresses (override any time).
3. Set your rate per mile (default from Team & Settings → Billing), choose Each horse or Split, Round trip or One way, and whether it applies to all horses. Save.
4. Each owner's invoice gets a line like "Hauling – 200 mi round trip @ \$2.00/mi (split ÷ 3 horses)" and the trip logs to Mileage.

Can I see the driving route to the show?

1. Show → Expenses → Hauling → View route opens a map with the drive, distance, time and turn-by-turn directions.

How do I print stall cards?

1. Horses → Stall cards.
2. Choose 4×6 or 4×3, a color preset or your own colors, and toggle elements: logo, show name, feed table, notes, trainer/owner contacts, emergency banner.
3. Pick the horses (or all) and Download PDF – one exact-size card per horse, ready to print.

11 · MESSAGING

Private barn chat with photos, reactions, read receipts and typing indicators.

How do I message my team or an owner?

1. Messages → New conversation. Pick one person for a direct chat or several for a group, name the group, Start.
2. Type and send; add a photo with the camera icon; long-press (or hover) a message to react with an emoji.
3. Read receipts and typing indicators work like texting. Unread counts show on the Chat tab and your home-screen icon.

Can I send a video in a chat?

1. Yes — tap the camera button in the message box and pick a video (or record one). Clips can be up to 5 minutes and 250 MB; it uploads in pieces (several at once, resuming if the signal drops) with a progress bar, so it works on cell data at the show. Kingly then optimises the clip so it plays on every phone and computer — you may see an 'Optimising...' tag for a minute or two on long videos.
2. Videos play right in the chat bubble; tap the full-screen control to watch it big. Recipients can't download a video that's on a timer.
3. Trainers can also keep clips on a horse's record: Horses → the film icon on the horse → Add video. Everyone at the barn can watch them there.

What does the clock button in a chat do?

1. If Kingly has turned it on for your account, a clock button sits next to the message box. Choose 30 seconds and the message is deleted for everyone 30 seconds after the other person reads it.
2. The countdown starts when the recipient actually opens the message, not when it was sent — unread messages wait. Tap a sent message to change or remove its timer.
3. Copy protection is on for messages with a timer — if someone tries to copy one, you're told.
4. Don't see the clock? The timer is off for your account. Ask Kingly support to turn it on.

How do I block or report someone in Messages?

1. Open the conversation → tap the name → Block user to stop their messages. Report sends the thread to Kingly's moderation team with your note.

How do I get notified about new messages?

1. Install Kingly on your home screen and turn on notifications in Team & Settings → Notifications. New messages arrive as push alerts and badge the app icon.

12 · TEAM & ROLES

Invite assistants with a code; they see the work, never the money.

How do I add an assistant to my barn?

1. Team & Settings → Team → Invite codes → Generate Assistant code.
2. Text the code to your assistant. They tap Join a barn on the sign-in page, enter the code, add their mobile number and create their login. Kingly texts them a short welcome that says exactly what they'll see.
3. The Assistant code is shared and reusable — one code for the whole crew — and rotates automatically whenever you remove someone, so a departed helper can't rejoin with the old code.
4. A Trainer (co-trainer) code is different: single-use and it expires after 72 hours, because it unlocks prices, invoices and the books.

Tip — Today shows an Invite your assistants card until the first one joins — it has the code and a one-tap text.

What can assistants see and do?

1. Assistants see Today, Shows, Horses (with Vet & meds), Chat, Services (without prices) and a limited Team & Settings.
2. They can check off the whiteboard, log services (auto-priced), add vet records, scan receipts and message the team.
3. They never see the Money section — invoices, payments, Books, Stripe or owner contact details. Trainers (barn owners) see everything; Bookkeepers see only Money → Books and Invoices.

How do I reset an assistant's password or remove them?

1. Team & Settings → Team → next to the person, Reset password (Kingly texts them a code) or Remove to revoke access instantly.
2. Removing someone also rotates the Assistant invite code and blocks that email from rejoining with any code. If they come back, add them yourself from Team → Add team member.

13 · OWNER PORTAL

Each owner gets a private link: invoices, payments, vet records, card on file.

How do I give an owner their portal link?

1. Horses → Owner portals. Every owner has a private link.
2. Tap Copy link. No account or app needed — the link opens their portal on any phone.
3. For safety a link stops working after 90 days without being opened (the list shows 'Link expired'). Tap New link to send a fresh one — the old link dies immediately. Use New link any time you think a link was forwarded to the wrong person.

Can owners download their horse's Coggins, health papers and x-rays?

1. Yes. Anything you attach to a vet record (Vet records → Add photos or PDF) shows up in the owner's portal under the Papers & X-rays tab, grouped by horse.
2. Owners tap View to see it or Download to save a copy for the show office. Coggins and health papers show a Valid to / Expires / Expired badge from the next-due date.
3. Files are only reachable through that owner's private portal link — other owners never see them.
4. Owners can also upload their own: Papers & X-rays → Upload a Coggins or vet paper (or Vet records → Add vet work). It lands under the horse with an Owner added badge and you get a text.

What do owners see in their portal?

1. Their horses with photos and papers, every invoice with a Pay button and live balance, payment history and receipts, upcoming shows, and vet records.
2. They can add or edit vet records for their own horse (marked "added by owner") and save a card on file for two-tap payments.
3. Nothing about other owners is ever visible.

How do I replace an owner's portal link?

1. Horses → Owner portals → Regenerate next to the owner. The old link stops working immediately; text the new one.

14 · SCHEDULES, RESULTS & POINTS

Class schedules and draws, results by class, season points, shareable result pages.

How do I record results and placings?

1. Open the show → Results. Each planned class lists your horses – enter the placing and how many horses showed. Kingly calculates points from the association schedule you've chosen.
2. Where a schedule import is connected, results can be pulled automatically as they post.

How are points calculated?

1. Team & Settings → Points & awards: choose the association point schedules you show under (AQHA, APHA, NSBA and others). Points depend on placing and the number of horses shown.
2. Season totals per horse appear on Results; a horse's points carry across shows.

How do I share the weekend's results with owners?

1. Show → Results → Share results. Kingly builds a Kingly-branded results page and square/story images for Instagram and Facebook.
2. Copy the link, text it, or post straight from the dialog. Owners open it without logging in.

15 · NOTIFICATIONS & YOUR PHONE

Install Kingly like an app, get push and text alerts, swipe back like native.

Can I use Kingly in Spanish?

1. Yes. Tap the EN / ES button in the top bar (next to the Aa size button) — every screen you use switches to Spanish instantly, and the choice is saved to your profile so it sticks on every device.
2. On the sign-in screen there's a "Ver en español" link so you can switch before you log in.
3. Texts and push notifications Kingly sends you — task assignments, 15-minute reminders, med times, Pack & prep — arrive in your language too.
4. Trainers: set a teammate's language on Team & Settings → Team (Edit next to their phone → language), or when adding them.
5. Help articles are translated the first time you open the Help Center in Spanish; a few may take a minute to appear.

Tip — Horse names, show names and anything you typed stay exactly as entered.

Which notifications can Kingly send, and where do I control them?

1. Team & Settings → Notifications is the control panel.
2. Push (this device) — task assignments, 15-minute reminders, new messages, payments received.
3. Texts — task assignments and reminders always; plus toggles for Med alerts, Weekly payment reminders (day/hour), Vet reminders, Payment texts, Thank-you texts to owners, Payout texts, and CC me on invoice emails.
4. Send test notification / Send test text confirm your phone is set up.

Push notifications aren't arriving — what should I check?

1. Kingly must be installed on your home screen (iPhone requirement) and opened from that icon.
2. Team & Settings → Notifications → the device toggle must be on for this phone; tap Send test notification.
3. Check the phone's own settings: Notifications → Kingly → Allow. Focus/Do Not Disturb silences banners.
4. If a device has push, Kingly skips the duplicate text — reminders still always go by text.

How do I get around on my phone?

1. Bottom tabs: Dash, Shows, Horses, Chat and More (everything else).
2. Use the back arrow at the top-left or swipe right from the left edge to go back, like a native app.
3. Dialogs slide up as bottom sheets; drag down to dismiss. Everything is built for one thumb at the ring.

Can I make the text bigger for the barn?

1. Settings → Barn profile → Display: switch on Barn mode for larger text and higher contrast — good for dusty screens and bright arenas.

16 · SHARING & REFERRALS

Share invoices, results and Kingly itself — and get thanked when a barn joins.

How do I share Kingly with another trainer?

1. Today → Share Kingly card. Your personal invite link is ready to copy, text, email or post to Facebook/Messenger.
2. When a barn signs up from your link you get a thank-you text, and the card shows your clicks and sign-ups.

How do I share a single invoice with someone?

1. Invoices → Share link on the invoice: a private read-only page with the live balance and pay button. Copy or text it.

17 · ACCOUNT & SECURITY

Barn profile, logo, timezone, passwords, sign-in protection.

How do I set my barn's name, logo, address and timezone?

1. Settings → Barn profile: name, phone, email, address (prints on invoices), timezone and notes.
2. Upload a logo (or take a photo of it) — it appears on invoices, PDFs, stall cards and the owner portal.
3. Save.

I forgot my password — how do I get back in?

1. On the sign-in page tap Forgot password. Enter your email or phone; Kingly texts (or emails) a 6-digit code.
2. Enter the code, set a new password, sign in. Trainers can also reset an assistant's password from Settings → Assistants.

How long do I stay signed in?

1. Up to 60 days per device, sliding — open Kingly at least once every 60 days and you never sign in again. Sign out from Settings (or the More menu) on shared devices.

Why does Kingly text me a code when I sign in?

1. Every sign-in is verified in two steps: your password, then a 6-digit code texted to the mobile number on your account (emailed if you have no mobile or texts are turned off). The code lasts 10 minutes.
2. Tick "Trust this device for 30 days" and that phone or computer won't be asked for a code again for a month. Tap Resend code, or "Email me instead", if the text doesn't arrive.
3. No code arriving? Check the mobile number under Settings → Account (trainers can fix an assistant's number under Team & Settings → Team). Never share a sign-in code with anyone — Kingly staff will never ask for it.

How is my data protected?

1. Payments run through Stripe; card numbers never touch Kingly. Sign-in takes two steps (password + a texted code) and locks after repeated failed attempts.
2. Every barn's data is isolated from every other barn. Exports are hardened against spreadsheet tampering, and invoice/portal links are long random tokens you can regenerate.

Where do I get help?

1. Tap the ? in the header on any screen — that's Ask Kingly. Ask in plain English; it answers from this library and offers Guide me to walk you through the steps right in the app.
2. Help (More → Help) is the long-form manual: browse by area or search any "how do I..." question.
3. Email support from the footer of kinglyequine.com.

18 · COLLEGIATE TEAMS

Ride boards by discipline, athlete My Rides, pre/post-ride checklists, whiteboard, questions and team chat.

How does a collegiate team sign in?

1. Your team has its own portal at /collegiate. Coaches sign in with their coach account; athletes use the athlete invite code the coach gives them, then their own email and password.
2. Bottom tabs on the phone: Home, Rides (Ride Boards for coaches / My Rides for athletes), Board, Chat and More.

How do I add athletes and coaches to my team?

1. Collegiate → Team: create an athlete or coach invite code and text it to them. Athletes pick their disciplines (Horsemanship, Jump Seat, Flat, Reining) when they join.
2. Remove someone from the roster any time; they lose access instantly.

How do I manage the team's horses?

1. Collegiate → Horses: add each school horse with barn name, notes and photo. Horses show up as options on every ride board.

How do I assign horses to athletes for the day?

1. Collegiate → Ride Boards: pick the date and discipline tab, then choose a horse (and optional notes / voice instructions) for each athlete and Save.
2. Athletes see their ride instantly under My Rides and get a push or text alert.
3. Tap Lineup to print or copy the whole day's lineup across disciplines.

Where do athletes see what they're riding today?

1. Collegiate → My Rides shows the horse, coach notes, voice instructions and the pre/post-ride checklists for each of your disciplines on the chosen date.
2. Answer the coach's post-ride questions right from the same card once you've ridden.

How do pre-ride and post-ride checklists work?

1. On the Ride Board, each assigned ride shows a Pre-ride and Post-ride task list. Tap Add task to pick from typical tasks (pick hooves, check legs, cool down...) or type your own.
2. Tap Edit <horse>'s defaults to save the tasks that should appear automatically every day that horse is on the board.
3. Type a new task and choose "Use & save to team list" to add it to the dropdown for every horse. Tap the × next to a built-in to hide it; restore hidden ones from the bottom of the list.
4. Athletes and coaches both check tasks off; the board shows who completed each one.

How does the team whiteboard work?

1. Collegiate → Board: add barn chores and team tasks for the day, assign them to athletes and check them off as they're done. Everyone sees it live.

How do post-ride questions work?

1. Collegiate → Questions: coaches write the questions athletes answer after each ride (rating scales, yes/no, or multiple choice).
2. Athletes answer from My Rides; coaches read every answer on the athlete's timeline in the Log.

Where can I see an athlete's ride history?

1. Collegiate → Log: pick an athlete to see a timeline of every ride, horse, coach notes and their question answers.

How does team chat work?

1. Collegiate → Chat: an all-team channel, one channel per discipline, and one-on-one messages between any coach and athlete.
2. Unread messages badge the Chat tab and your home-screen icon, and send a push or text alert if you've turned them on in Settings.

How do I turn on text and push alerts for my team account?

1. Collegiate → Settings: enter your mobile number and switch on text alerts, and tap Enable push on each phone you want notified.
2. You can also pick your own accent color there; coaches set the team name, color and logo.

STILL STUCK?

Open Help inside the app, type your question in plain English, and tap Guide me — Kingly takes you to the right screen and walks you through it step by step. Or email admin@kinglyequine.com.



kinglyequine.com/guide
the always-current online version