



KINVARA

— BREED • MANAGE • ELEVATE —

Getting Started with Kinvara

The complete, step-by-step guide to running your breeding program in the cloud

WELCOME

Your program, kept like an heirloom

Kinvara is a single, beautiful home for everything in your breeding program — your dogs, your litters, the families waiting for a puppy, your agreements, and every dollar in and out. It runs in your web browser, so it works on your computer, your tablet, and your phone, with nothing to install and nothing to lose if a computer dies.

It's built around one belief: **you got into this for the dogs, not the paperwork.** Kinvara automates the busywork — applications, approval letters, agreements, deposits, waitlist positions, puppy shot records, and a private portal for each family — so the hours you used to spend at the desk go back to the whelping box.

How to use this guide

This edition is written to be followed **click by click**. Each chapter covers one area of Kinvara, in the order a new breeder meets them: first you create your account and set up your kennel, then your dogs and litters, then the families and the business side. Every chapter has a picture of the real screen and short, numbered steps you can follow along with — or read aloud, since this guide doubles as the script for our how-to videos.

A few things to know before you start

- **Your data is yours, and it's private.** Every breeding program on Kinvara is completely walled off from every other. Nobody sees your dogs, families, or finances but you.
- **It's saved in the cloud, automatically.** Your records live in a professionally managed, continuously backed-up database — not on one fragile laptop.
- **Look for the cream buttons.** On any screen, the solid button in the top-right of the header is the main action for that page — *Add a Dog*, *Add a Litter*, *New Invoice*. When in doubt, that's your next click.
- **You can't really break anything.** Records you remove are archived rather than destroyed, and anything you edit can be edited again. Turning a tool off just hides it — nothing is deleted.

TIP

Kinvara works best in a modern browser — Chrome, Edge, or Safari. Bookmark the app and it's one click away, exactly like any website.

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Creating your account

Everything starts at the sign-in page. The very first time you visit, you'll create your breeding program in about a minute — after that, it's just your email and password.

Kinvara

KINVARA
BREED • MANAGE • ELEVATE

Your breeding program, kept like an heirloom. Dogs, litters, families, agreements, and every dollar — in one place, visible only to you.

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Start your program
Create your account — your data is yours alone.

First name

Last name

Breeding program name
e.g. Poodles of Piedmont

Email

Password
At least 10 characters.

Create account

Already have an account? [Sign in](#)

The sign-up screen — "Start your program."

Creating your program (first visit)

- 1 Open Kinvara in your web browser. You'll land on the sign-in card, titled **Welcome back**.
- 2 Under the card, click **Create your program**. The card switches to **Start your program**.
- 3 Fill in the five fields: **First name**, **Last name**, your **Breeding program name** (for example, "Blue Ridge Rottweilers" — this becomes your kennel's name throughout the app), your **Email**, and a **Password**.
- 4 Your password must be **at least 10 characters** — Kinvara reminds you right under the field.
- 5 Click the **Create account** button. Your program is created, and Kinvara takes you straight into the setup wizard (Chapter 2).

Signing in after that

- 1 On the **Welcome back** card, enter your **Email** and **Password**.
- 2 Click **Sign in**. You'll land on your Overview page.

TIP

Choose a password you don't use anywhere else — this account holds your families' contact details and your business records. A password manager, or even a note in a drawer at home, beats reusing an old favorite.

GOOD TO KNOW

You stay signed in on a trusted computer, so you rarely re-type your password. Use **Sign out** (in the account menu, top-right) on any shared or public computer.

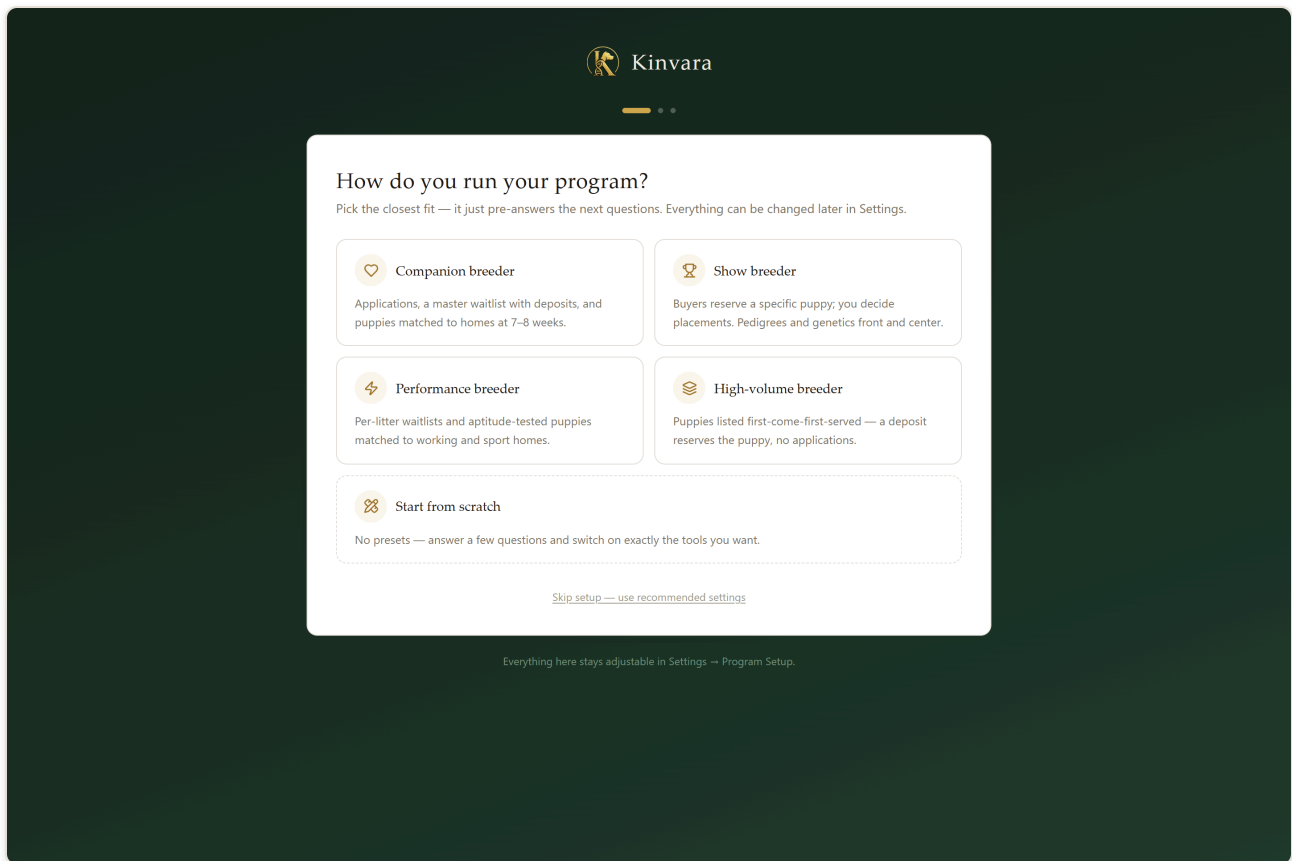
ON CAMERA

Record this as your first short video. Start logged out, click *Create your program*, fill each field slowly while narrating, and end the moment the wizard appears — that hands off perfectly to video two.

The setup wizard — telling Kinvara how you work

The first time you sign in, Kinvara greets you with a short, three-step wizard. Its whole job is to learn how *you* run your program, then set the app up to match — so you never wade through features you don't use. It takes a minute, and everything here can be changed later in Settings.

Step 1 — “How do you run your program?”



Pick the card closest to how you work — it simply pre-answers the next questions.

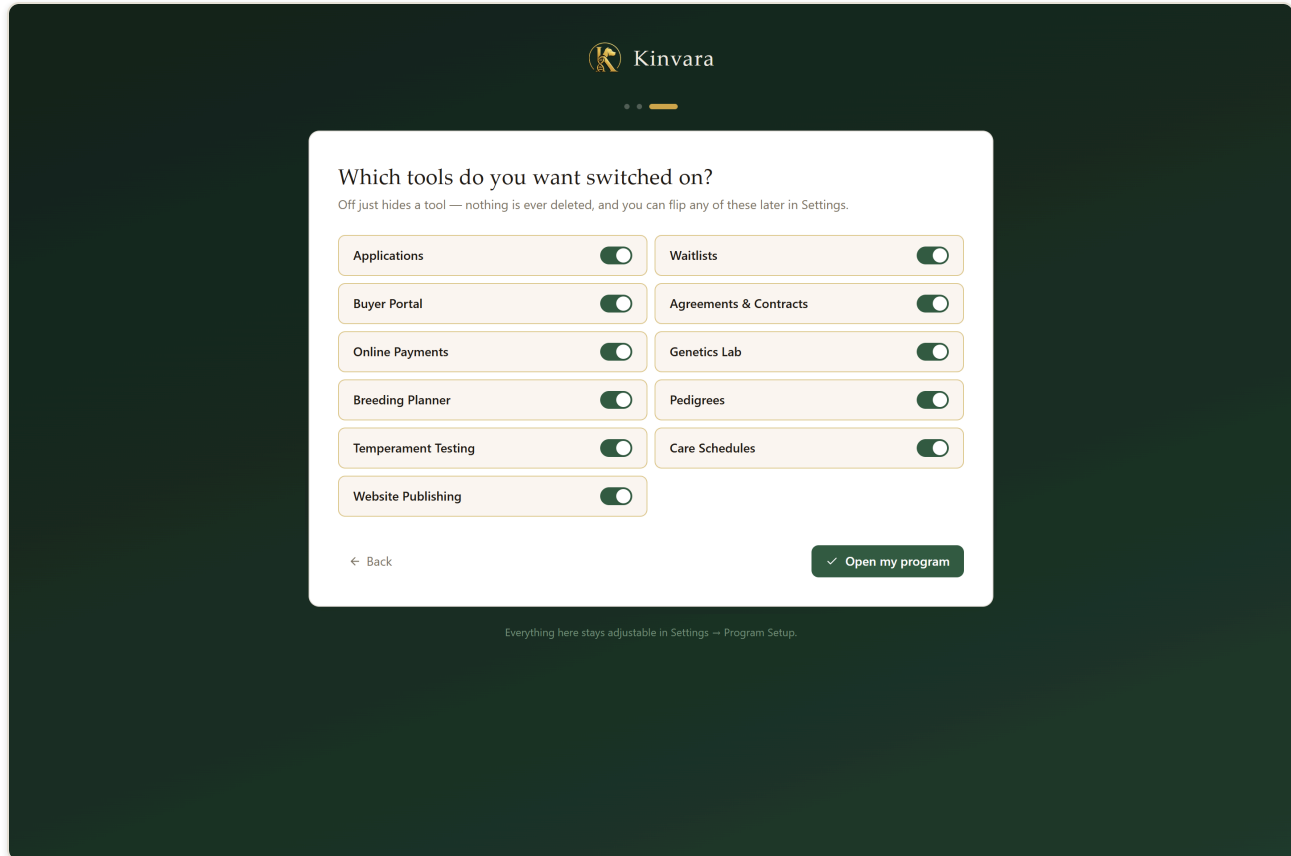
Choose the card that fits you best. Your pick isn't a lock-in — it just fills in sensible defaults on the next step:

- **Companion breeder** — applications, a master waitlist with deposits, and puppies matched to homes at 7–8 weeks.
- **Show breeder** — buyers reserve a specific puppy; you decide placements. Pedigrees and genetics front and center.
- **Performance breeder** — per-litter waitlists and aptitude-tested puppies matched to working and sport homes.

- **High-volume breeder** — puppies listed first-come-first-served; a deposit reserves the puppy, no applications.
- **Start from scratch** — no presets; you answer every question yourself.

In a hurry? The link **Skip setup — use recommended settings** accepts good defaults and drops you straight into the app.

Step 2 — “A few questions about how you sell puppies”



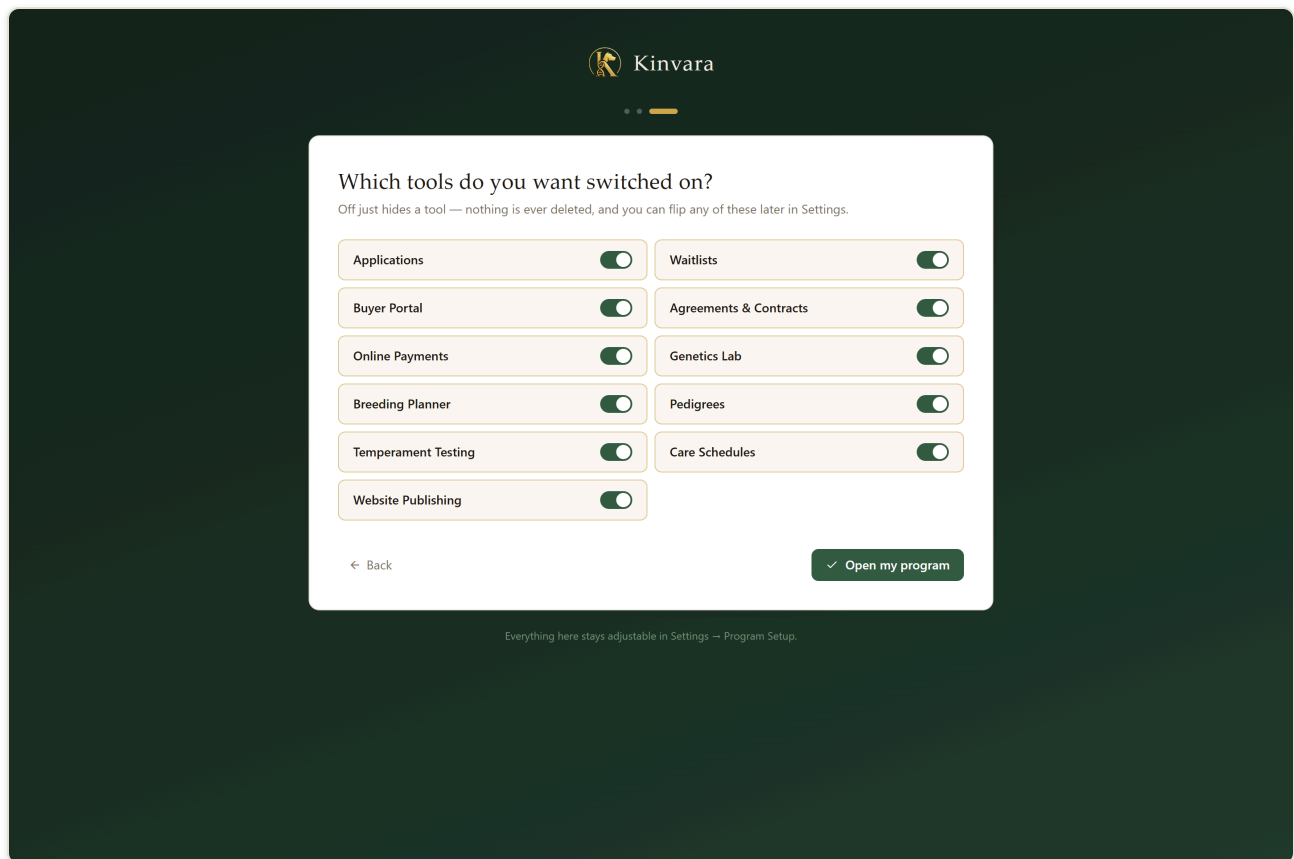
These answers shape defaults across the whole app — waitlists, the pipeline, and payments.

Adjust anything the template pre-filled. You'll set:

- **How are puppies sold?** — Master waitlist, Waitlist per litter, First come first served, or Reserve a specific puppy.
- **When do buyers pick their puppy?** — from “Right away, when listed” through “At 7–8 weeks,” or “I match puppies to homes.”
- **Require an application first?** and **Deposit required to hold a spot?** — simple Yes / No.
- If deposits are required: **Are deposits refundable?** and whether the **contract is signed before or after the deposit.**
- **What do you call your puppy buyers?** — Families, Buyers, Applicants, Puppy Parents, or Clients. Whatever you choose is the word Kinvara uses everywhere (the sidebar heading, page titles, and this guide's examples all follow it — we say *Families*).

Click **Continue**.

Step 3 — “Which tools do you want switched on?”



The screenshot shows the Kinvara application interface. At the top, the Kinvara logo is displayed. Below it, a progress bar indicates the current step. The main content area is a white card with the title "Which tools do you want switched on?". A subtitle explains: "Off just hides a tool — nothing is ever deleted, and you can flip any of these later in Settings." The card contains a grid of 11 toggle switches, all of which are currently turned on. The tools listed are: Applications, Waitlists, Buyer Portal, Agreements & Contracts, Online Payments, Genetics Lab, Breeding Planner, Pedigrees, Temperament Testing, Care Schedules, and Website Publishing. At the bottom left of the card is a "← Back" link, and at the bottom right is a green button labeled "✓ Open my program". Below the card, a small note states: "Everything here stays adjustable in Settings → Program Setup."

Every tool is a switch. Off just hides it — flip it back on any time in Settings.

Turn on only what you'll use. The tools are: Applications, Waitlists, Buyer Portal, Agreements & Contracts, Online Payments, Genetics Lab, Breeding Planner, Pedigrees, Temperament Testing, Care Schedules, and Website Publishing. Anything you switch off simply disappears from the sidebar until you want it. When you're happy, click **Open my program** — and you're in.

GOOD TO KNOW

Nothing here is permanent. Everything you set stays adjustable under **Settings** → **Program Setup**, and you can even re-run this whole wizard from there. Turning a tool off never deletes anything.

Finding your way around

Kinvara uses the same simple layout on every page: a dark-green sidebar on the left for going places, and a top bar across the top for searching and account things. Learn these two strips and you know the whole app.

The sidebar — where everything lives

The sidebar is grouped so related tools sit together:

- **Overview** — your daily starting point.
- **Your Program** — Dogs, Litters, the Breeding Planner, and Documents.
- **Families** — Applications, Waitlists, and Contacts. (This heading shows whatever word you chose for your buyers.)
- **Business** — Money (your Invoices), Agreements, and Email Templates.
- **Care & Planning** — the Calendar and Care Schedules.
- **Insights** — Reports, Website Traffic, Pedigrees, the Genetics Lab, Activity, and Settings.

Two items — **Money** and **Reports** — expand when you click them to reveal their sub-pages.

GOOD TO KNOW

A few sidebar names are friendlier than the page they open — *Breeding Planner* opens a page titled “Litter Planner,” *Money* opens “Invoices,” *Agreements* opens “Contracts,” and *Genetics Lab* opens “Genetics Forecast.” Same place, slightly different label — nothing to worry about.

The top bar

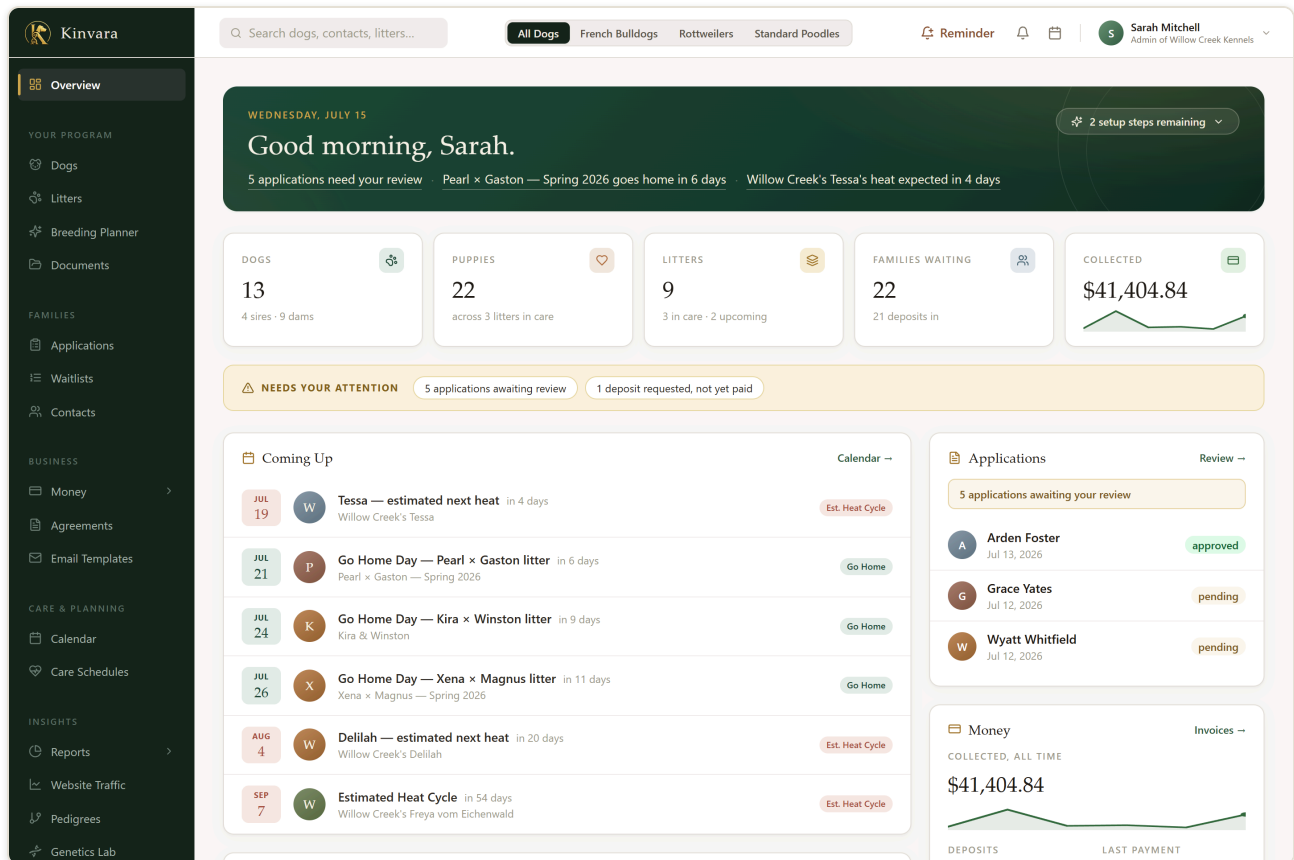
- **Back** — returns to the previous page, exactly like your browser's back button.
- **Search** — start typing any dog, contact, or litter name and jump straight to it. Two or three letters is usually enough.
- **Program switcher** — if you run more than one line (say, Poodles *and* Goldendoodles), buttons appear here to filter the whole app to one program. *All Dogs* shows everything. (More in Chapter 7.)
- **Reminder** — jot a quick reminder without leaving the page.
- **The bell** — notifications and recent activity, with a red dot when something's new.
- **Calendar** — a shortcut straight to your calendar.
- **Your name** — the account menu, with *Settings*, *User Profile*, and *Sign out*.

TIP

The search box is the fastest way to move around once your program grows. Make it a habit — it's quicker than hunting through the sidebar.

The Overview — your morning coffee page

The Overview is the page Kinvara greets you with: today's numbers, what's coming up, and shortcuts into anything that needs your attention. Most days, one glance here tells you everything.



The Overview: a greeting, your setup progress, stat tiles, and launchpad cards.

What you're looking at

- **The greeting & setup steps.** A brand-new program shows a small pill — “*N setup steps remaining*” — that expands into a friendly checklist (Foundations, Reach, Money). Work through it and it disappears.
- **The stat tiles** — Dogs, Puppies, Litters, Families Waiting, and Collected. These update themselves.
- **Needs your attention** — an amber band that surfaces anything waiting on you.
- **Coming Up** — the next events from your calendar: estimated heats, appointments, go-home days.
- **Litters, Applications, Money, and Waitlists** — bite-size cards, each with a link into the full page.
- **The Pack & Notebook** — your dogs' portraits, and a scratch-pad for anything you'd otherwise scribble on paper (type a note and click *Save note*).

TIP

Almost everything on the Overview is clickable — the litter names, the applicant, the card links like *Review →* and *Invoices →*. Treat it as a launchpad.

Settings: your organization & identity

Before you add a single dog, it's worth five minutes in **Settings** to tell Kinvara who you are. Open Settings from the bottom of the sidebar (or the account menu). Across the top you'll see a row of tabs — this chapter covers the first one, **Organization**.

The screenshot shows the Kinvara web application interface. The top navigation bar includes a search bar, tabs for 'All Dogs', 'French Bulldogs', 'Rottweilers', and 'Standard Poodles', and a user profile for Sarah Mitchell. The left sidebar lists various app sections like Overview, Dogs, Litters, Breeding Planner, Documents, Families, Applications, Waitlists, Contacts, Business, Care & Planning, Insights, and Genetics Lab. The main content area is titled 'Settings' and 'YOUR PROGRAM'. Below this is a row of tabs: 'Organization' (selected), 'Program Setup', 'Website', 'Buyer Portal', 'User Profile', 'Users', 'Breeds', and 'Emails'. The 'Organization' tab contains a form with the following fields:

- Organization Name:** Willow Creek Kennels
- Slug:** willow-creek-kennels
- Species:** dog
- Website URL:** https://willowcreek-demo.example.com
- Default Breed:** Standard Poodle
- Preferred Currency:** usd
- Weight Unit:** lb
- Pregnancy Estimate (days):** 61
- Go Home (weeks):** 8
- Venmo Handle:** @WillowCreekKennels
- PayPal Link:** https://paypal.me/willowcreekkennels
- CashApp Handle:** \$WillowCreekK9
- Zelle Info:** billing@willowcreekkennels.example
- Button Color:** #244638

At the bottom of the form, there is a checkbox labeled 'Enable Spay/Neuter tracking' which is checked. A 'Save Organization' button is located at the bottom right of the form.

Settings → Organization — your kennel's name, identity, and defaults.

Filling in the Organization tab

- 1 Organization Name** — your kennel or program name. This appears on printed documents and (as it rolls out) your emails and the family portal.
- 2 Slug** — a short, web-friendly version of your name (letters and dashes). It's used in links, like your application page. Keep it simple.
- 3 Species, Default Breed** — set these so new dogs start with the right defaults.
- 4 Website URL** — your public website, if you have one.
- 5 Preferred Currency and Weight Unit** — pick dollars/pounds (or your local equivalents) once, and the whole app follows.

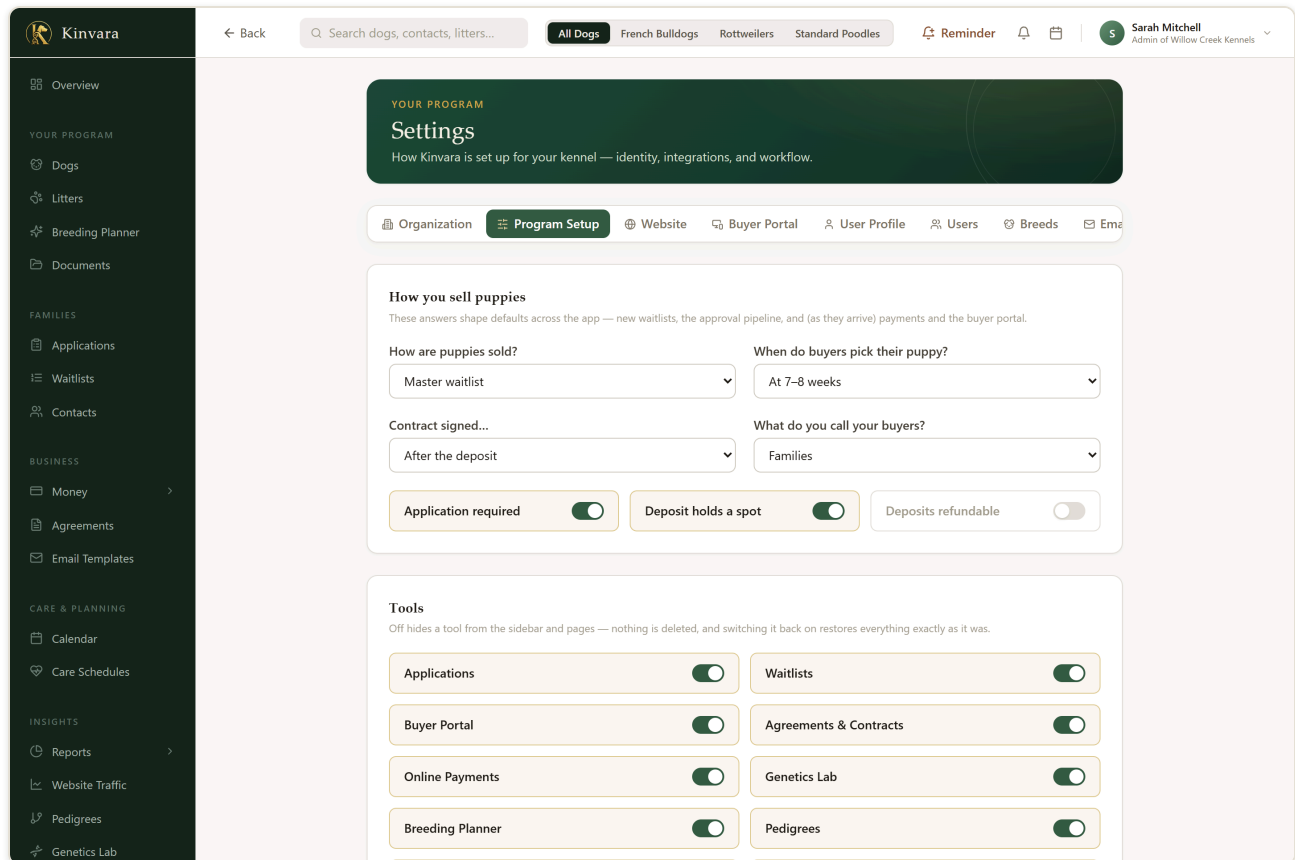
- 6 **Pregnancy Estimate (days)** and **Go Home (weeks)** — the numbers Kinvara uses to estimate due dates and go-home dates. The common defaults are 63 days and 8 weeks; adjust to your breed.
- 7 **Payment handles** — your **Venmo**, **PayPal**, **CashApp**, and **Zelle** details. These become the “ways to pay” a family sees (Chapters 11 and 26).
- 8 **Button Color** and **Enable Spay/Neuter tracking** — small touches: your accent color, and whether to track spay/neuter dates.
- 9 Click **Save Organization**.

TIP

Get the currency, weight unit, and the pregnancy/go-home estimates right on day one — they quietly drive due-date math, weight charts, and go-home reports everywhere else.

Program Setup — turning tools on & off

The **Program Setup** tab is the wizard from Chapter 2, living permanently in Settings. Every answer you gave — and every tool you switched on — is here to change whenever your program changes.



Settings → Program Setup — your sales workflow and your tools, editable forever.

How you sell puppies

The top section mirrors the wizard: **How are puppies sold?**, **When do buyers pick their puppy?**, **Contract signed before or after the deposit**, **what you call your buyers**, and the toggles for **Application required**, **Deposit holds a spot**, and **Deposits refundable**. These choices set defaults across new waitlists, the approval pipeline, and payments.

Tools

The **Tools** section has one switch per feature. Turn a tool off and it vanishes from the sidebar and pages; turn it back on and everything returns exactly as it was — nothing is ever deleted. This is how you keep Kinvara showing only what you actually use.

- 1 Flip any workflow answer or tool switch.

2

Click **Save Program Setup**. The sidebar and pages update immediately.

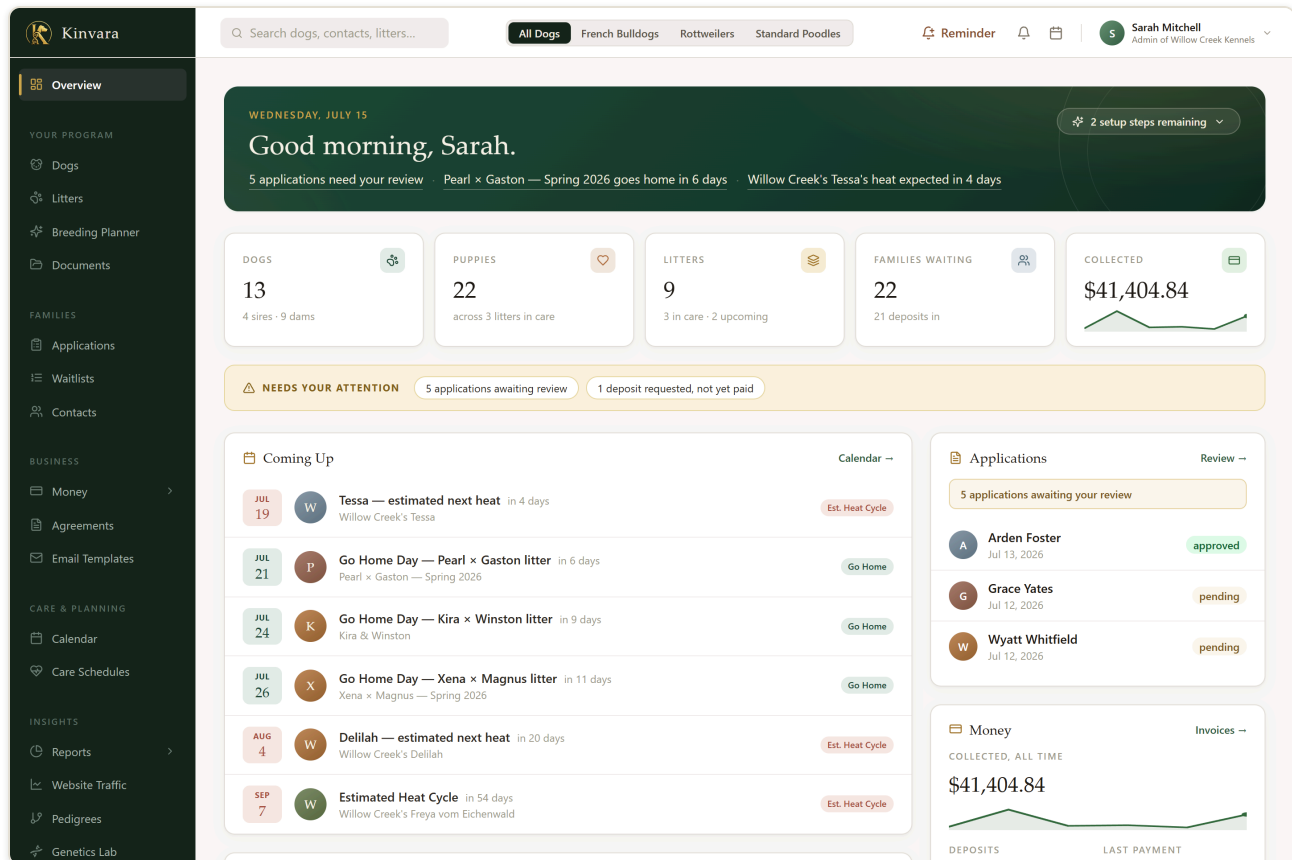
Prefer to start over? The link **Re-run the setup wizard** replays Chapter 2 from the beginning.

GOOD TO KNOW

Program Setup applies to your whole account — it's not per-program. If you run two lines, they share one workflow; the per-program magic happens with tags and the program switcher, which is the next chapter.

Running more than one program

Plenty of breeders run two lines — say Poodles *and* Goldendoodles — under one roof. Kinvara handles this gracefully, and the setup is refreshingly simple: you don't create “programs” anywhere; you just **tag your breeding dogs**, and Kinvara does the rest.



Once two programs exist, the top bar grows a switcher: All Dogs, Poodles, Goldendoodles.

Setting it up

- 1 Open a breeding dog's profile. In the header, click the dashed + **Tags** button.
- 2 Type the program name as a tag — for example *Poodle*, or *Goldendoodle* — and add it. That tag is the program.
- 3 Tag each of your sires and dams with the line they belong to. A stud used in both lines can carry *both* tags.
- 4 Puppies need no tagging — they inherit their program from their litter automatically.

Switching between programs

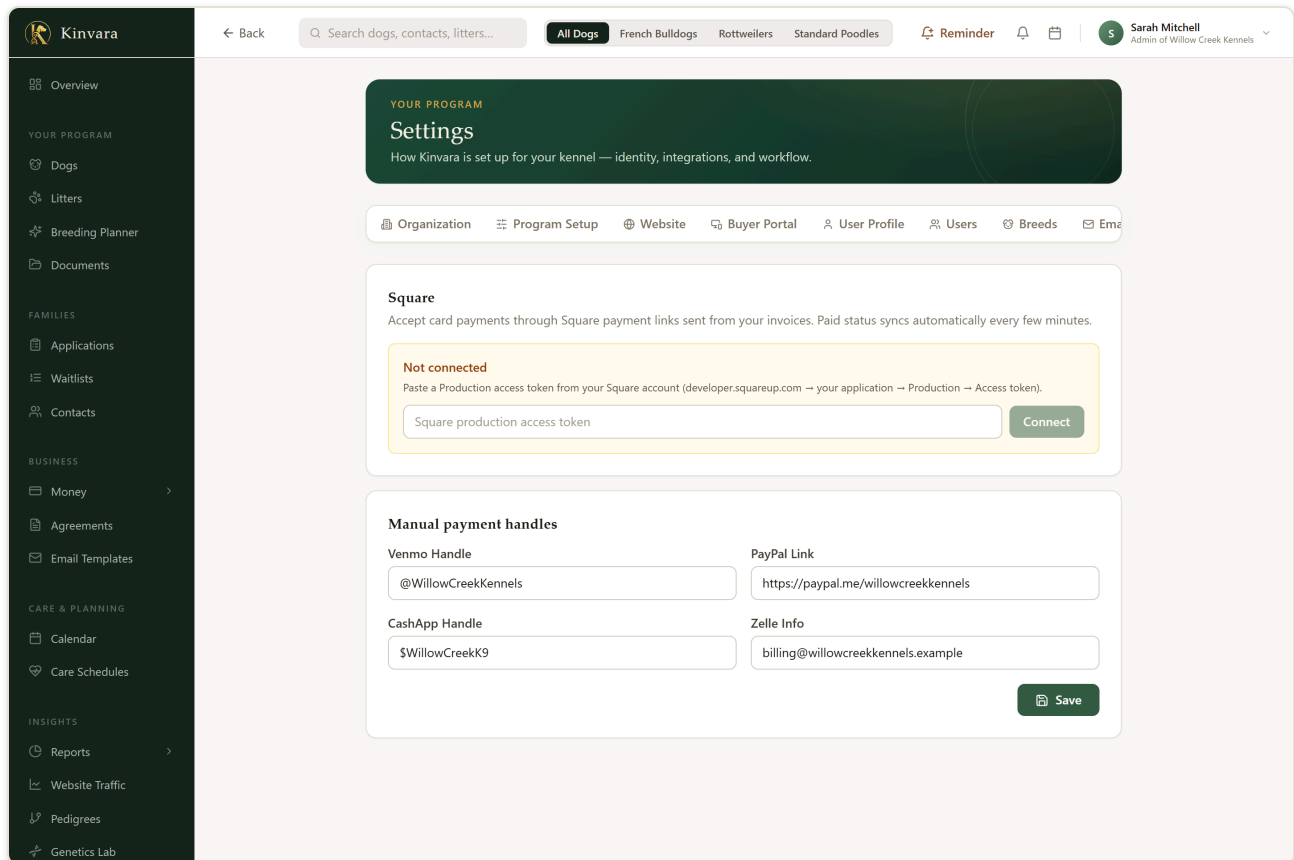
The moment two program tags exist, a **switcher** appears in the top bar with a button per program plus **All Dogs**. Click *Poodles* and the Overview, Kennel, and Contacts pages filter to just that line; click *All Dogs* to see everything again. Your choice is remembered between visits.

TIP

Keep your tag names short and consistent — one word each — because Kinvara pluralizes them for the switcher buttons (tag “Poodle” becomes the button “Poodles”). Waitlists follow the same idea: name a list “Poodle Master Waitlist” and it lines up with the Poodle program.

Connecting Square for card payments

Kinvara takes card payments through **Square** — your own Square account, so the money lands with you and the fees are Square's standard rates. Connect it once and Kinvara can send families a pay-by-card link and mark invoices paid automatically when the money arrives.



Settings → Payments — connect your Square account, or list manual ways to pay.

Connecting Square

- 1 Open **Settings** → **Payments**. You'll see the **Square** card, marked *Not connected*.
- 2 In your Square account, go to **developer.squareup.com** → **your application** → **Production** → **Access token** and copy your **Production access token**.
- 3 Paste it into the **Square production access token** box and click **Connect**.
- 4 The card turns green — **Connected** — with your account name. From here you can open your Square **Dashboard**, run a **Test**, or **Disconnect**.

Manual ways to pay

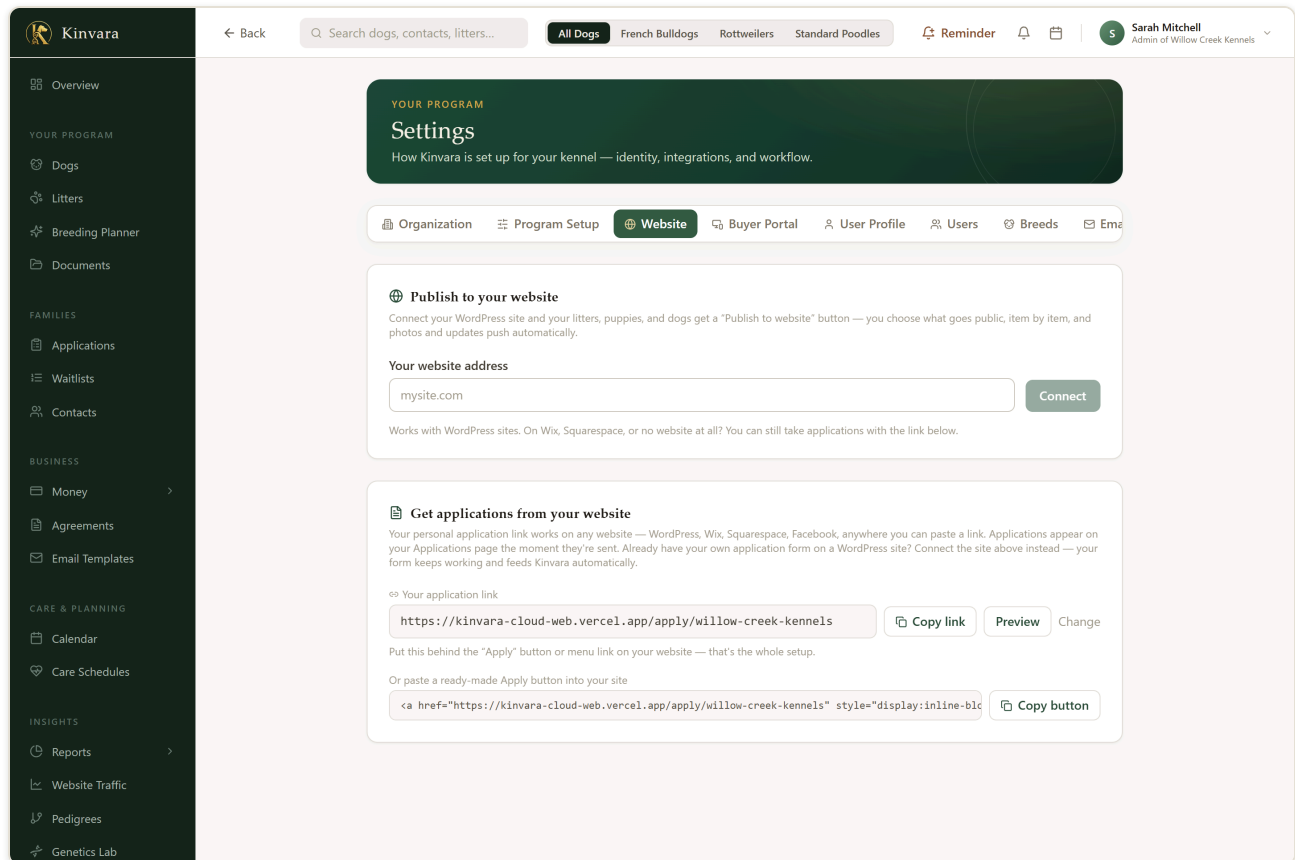
Not everyone wants cards. The same tab has a **Manual payment handles** card for your **Venmo**, **PayPal**, **CashApp**, and **Zelle** — fill in the ones you use and click **Save**. These show up as pay options for your families alongside (or instead of) the card link.

GOOD TO KNOW

Once Square is connected, an invoice can carry a secure *Pay with card* link, and when the family pays, Kinvara notices within a few minutes and marks the invoice paid — no manual bookkeeping. Chapters 25 and 27 show this in action.

Connecting your website & application link

This is where Kinvara starts saving you real time. The **Website** tab does two independent things: it can *publish* available puppies onto your own site, and it gives you a ready-made *application link* that feeds straight into Kinvara. You can use either, or both.



Settings → Website — publish to your site, and get your application link.

Get applications from your website (works with any site)

This is the quickest win and works no matter what your website is built with — WordPress, Wix, Squarespace, even a Facebook page.

- 1 In the **Get applications from your website** card, **Pick your link name**. Kinvara builds a public address like `yourapp/apply/your-kennel`.
- 2 Click **Save link**.
- 3 Use **Copy link** to grab it, **Preview** to see the branded form, and the ready-made **Apply for a puppy** button (with **Copy button**) to drop onto your site.

Every submission arrives instantly on your Applications page (Chapter 24) — no copying from emails, no lost inquiries.

Publish to your website (WordPress)

If your site runs on WordPress, Kinvara can publish your available puppies to it directly:

- 1 In the **Publish to your website** card, type **Your website address** and click **Connect**.
- 2 Click **Download your plugin** — your connection key is already baked inside, nothing to copy or paste.
- 3 In WordPress, go to *Plugins* → *Add New* → *Upload Plugin*, choose the `kinvara-connect.zip` file, and click **Activate**.
- 4 Back in Kinvara, click **Test connection**. Green means you're done.
- 5 Drop the shortcode `[kinvara_puppies status="available"]` onto any page to show your available puppies.

GOOD TO KNOW

Already collect applications through a form plugin on your own site (Contact Form 7, WPForms, and the like)? Once your site is connected, each form appears here with an on/off toggle, so your existing form can feed Kinvara without you rebuilding anything.

Setting up email

Kinvara can send your approval letters, invoices, and portal invitations from *your* kennel's email address, so to families it's simply you — at your most organized. The **Email Intake** tab is where you connect that mailbox.

The screenshot shows the Kinvara web interface. The left sidebar contains navigation links: Overview, YOUR PROGRAM (Dogs, Litters, Breeding Planner, Documents), FAMILIES (Applications, Waitlists, Contacts), BUSINESS (Money, Agreements, Email Templates), CARE & PLANNING (Calendar, Care Schedules), and INSIGHTS (Reports, Website Traffic, Pedigrees, Genetics Lab). The main content area is titled 'Settings' under 'YOUR PROGRAM'. It has tabs for Organization, Program Setup, Website, Buyer Portal, User Profile, Users, Breeds, and Email. The 'Email Intake (IMAP)' section is active, showing an 'Enabled' toggle. Below it, fields for IMAP host (imap.gmail.com), Port (993), TLS (On (993)), Username (applications@yourkennel.com), App password (app-specific password), Folder (INBOX), and Check every (minutes) (15) are visible. At the bottom of this section are buttons for 'Test connection', 'Check email now', and 'Save'. The 'Sending (SMTP)' section is also visible, with an 'Enabled' toggle. It includes fields for SMTP host (smtp.gmail.com), Port (587), and Secure (STARTTLS (587)).

Settings → Email Intake — a Sending card (outgoing) and an Intake card (incoming).

Sending — so emails come from you

- 1 Open **Settings** → **Email Intake** and find the **Sending (SMTP)** card.
- 2 Tick **Enabled** — this is the master “email is on” switch.
- 3 Enter your mailbox's **SMTP host**, **Port**, and **Secure** setting, plus the **Username** and **Password**. (For common providers, leaving the host blank lets Kinvara auto-detect it.)
- 4 Set the **From name** and **From email** your families should see — for example “*Poodles of Piedmont.*”
- 5 Click **Save**. Use **Send test** to email yourself a sample and confirm it looks right.

Intake — turn emailed inquiries into applications (optional)

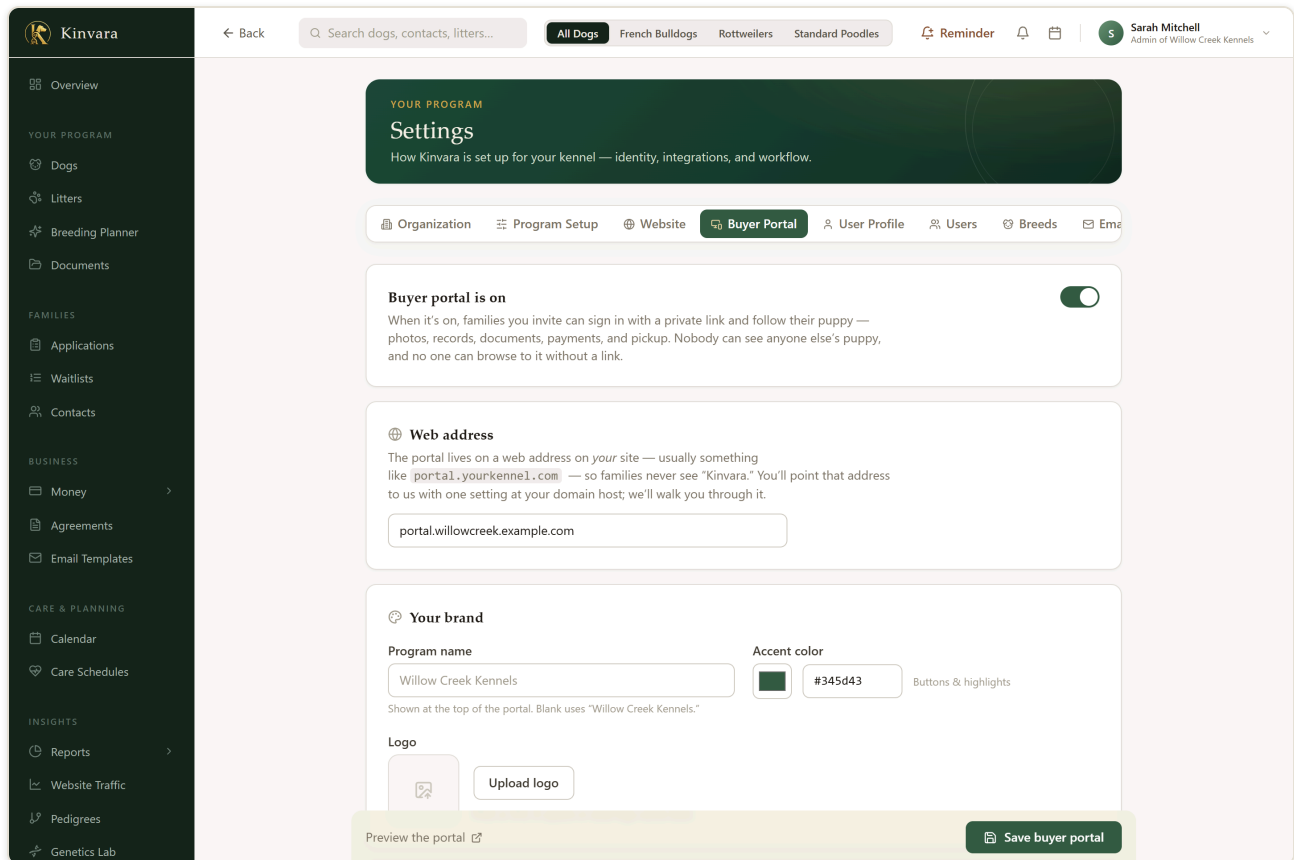
The **Email Intake (IMAP)** card is the reverse: Kinvara can watch a mailbox and turn matching emails into application submissions. Enter your IMAP **host**, **port**, **username**, and an app password, choose how often to check, and **Save**. This is handy if inquiries arrive by email rather than through your website form.

TIP

Most email providers ask you to create a one-time “app password” for outside programs rather than using your everyday login password. Generate one in your email account's security settings and paste that here — it's more secure and easy to revoke.

Setting up the Buyer Portal

The Buyer Portal is a private, branded web page each family gets for their puppy — photos and updates, weights, health records, the family tree, documents, and a place to pay their balance. The **Buyer Portal** tab is where you brand it and choose what families see.



Settings → Buyer Portal — your brand, the sections families see, and pickup details.

Turning it on and branding it

- 1 Open **Settings** → **Buyer Portal**. First set a **Web address** for the portal (for example *portal.yourkennel.com*) — the master switch needs this.
- 2 Flip **Buyer portal is on**.
- 3 Under **Your brand**, set the **Program name** and **Accent color**, and **Upload logo**. This is what families see at the top of their page.

Choosing what families see

Under **What families see**, toggle each section on or off: *Photos & updates, Weight tracker, Videos, Temperament read, Health records, Mom & Dad, Family tree, Documents & go-home packet, Payments &*

balance, and *Pickup center*. Show as much or as little as you like.

- 1 Under **Ways families can pay you**, turn on the methods you accept — Venmo, Cash App, PayPal, Zelle — plus a free-text **Other ways to pay** box.
- 2 Fill in the **Pickup center**: *Where to come*, *What to expect on the day*, and a *What to bring* checklist.
- 3 Click **Save buyer portal**, then **Preview the portal** to see exactly what a family will see.

GOOD TO KNOW

This chapter just *builds* the portal. Actually inviting a family to theirs happens from their contact record (or their puppy's dog page) — that's covered in Chapter 26, once you have families and puppies to invite.

Housekeeping: profile, users, breeds, billing

A few smaller Settings tabs round out your setup. You can visit these once and mostly forget them.

The remaining tabs

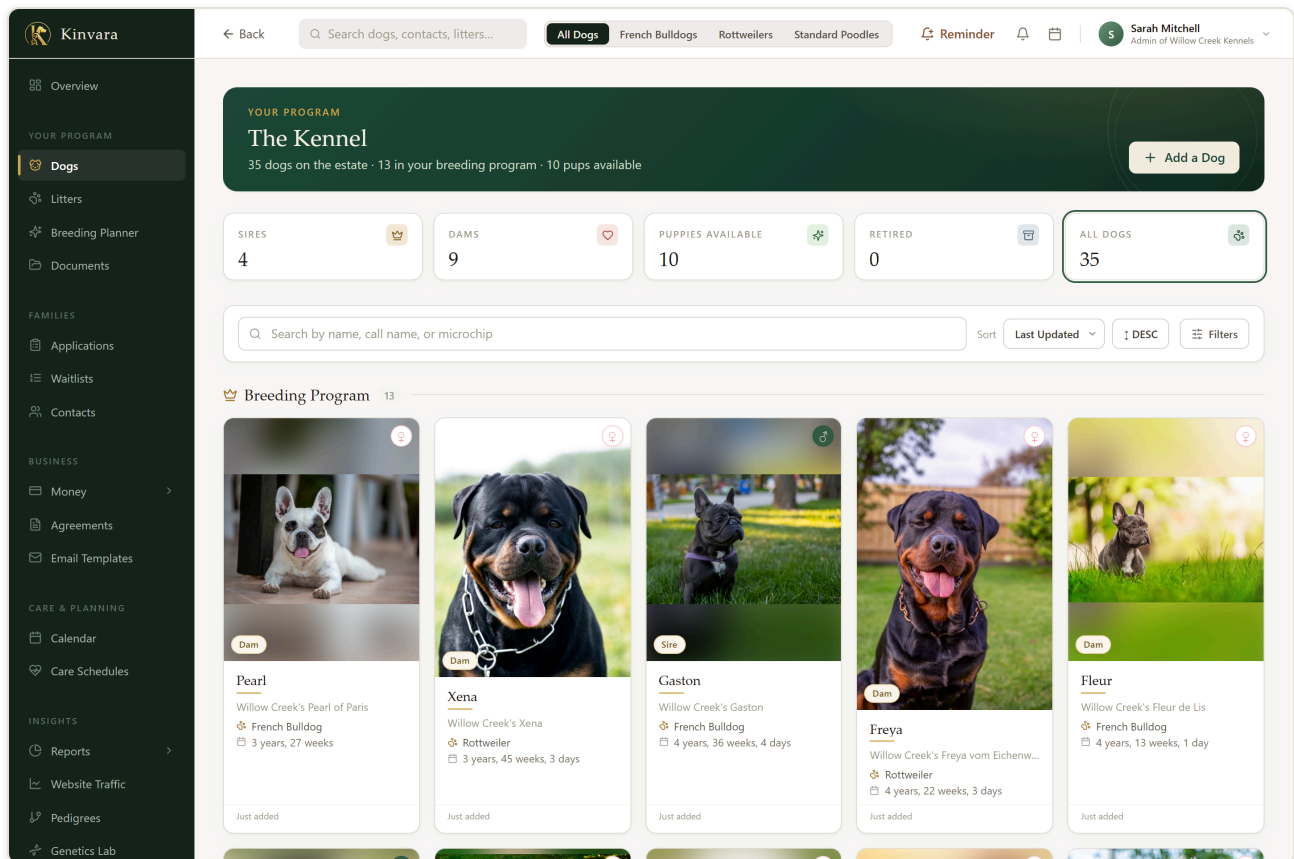
- **User Profile** — your own name, email, and phone. Click **Save Profile**.
- **Users** — invite a colleague or family member with **Invite User**. (Team logins are still arriving; for now this is where they'll live.)
- **Breeds** — build your list of breeds so they appear as tidy choices when you add dogs. Type a name and click **Add**.
- **Email Templates** — a shortcut to the same templates covered in Chapter 29.
- **Billing** — your plan (Starter, Standard, or Pro) and what each includes.
- **Referrals** — your referral code. Share it with a fellow breeder and, when they subscribe, you both get a free month.

TIP

That's your kennel set up. From here on, the guide is about daily work — dogs, litters, and families. If you only do one thing before moving on, add your breeds so the dog form is a breeze.

Adding your dogs

The Dogs page — titled **The Kennel** — is your whole pack at a glance: every breeding dog and puppy, with a portrait. Each dog has a full profile behind their card. Let's add your first one.



The Kennel — dogs grouped into Breeding Program, Puppies, and Retired & Others.

Adding a dog

- 1 Open **Dogs** in the sidebar and click the **Add a Dog** button (top-right).
- 2 Enter the **Registered Name** (required) and a **Call Name** — what you actually shout across the yard.
- 3 Fill in what you know: **Breed**, **Color**, **Date of Birth**, **Microchip**, **Registration #1**, and **Sale Price** if relevant.
- 4 Choose the **Type**: *Active Breeding Dog* for your sires and dams, *Puppy*, *Retired*, *Co-Owned*, *Sold*, or *Guardian Home*. This matters — the Breeding Planner and Genetics Lab look at your Active Breeding Dogs.
- 5 Set the **Sex**.

Finding dogs later

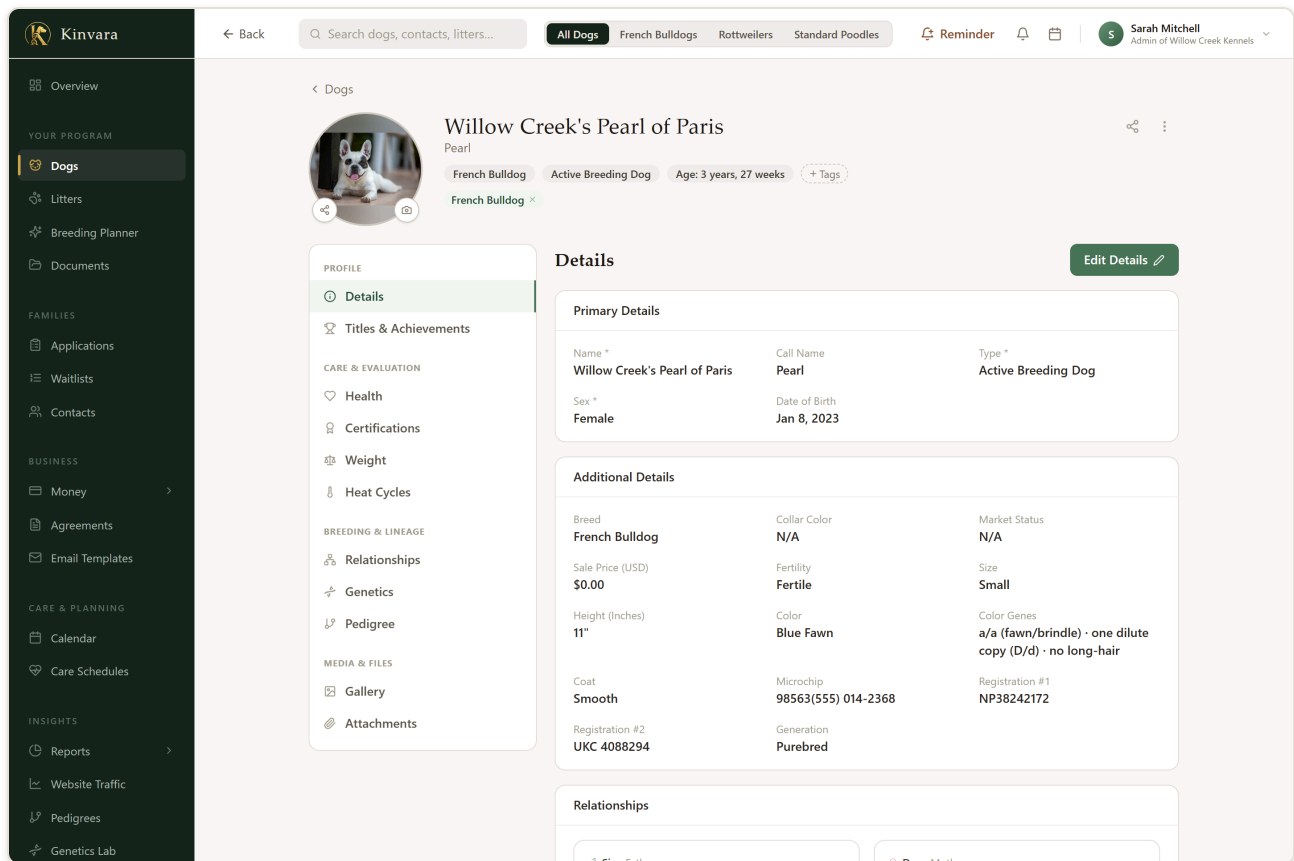
As your pack grows, the Kennel page earns its keep. The stat band across the top — **Sires, Dams, Puppies Available, Retired, All Dogs** — doubles as one-click filters. There's a search box (by name, call name, or microchip), a sort menu, and a **Filters** button for breed, color, sex, date of birth, and archived dogs.

TIP

Add a photo to every dog — the app feels alive when the kennel shows real faces, and families love seeing the parents. Photos also flow automatically onto litters and the Breeding Planner.

The dog profile in depth

Click any dog to open their profile — the single home for everything about that dog. A portrait and key details sit up top; a left-hand rail of tabs holds the deeper records.



A dog's profile — details and photo up top, record tabs down the left rail.

The tabs, grouped

- **Profile** — *Details* (everything about the dog) and *Titles & Achievements*.
- **Care & Evaluation** — *Health*, *Certifications*, *Weight*, and *Heat Cycles* (for females). Covered in Chapter 15.
- **Breeding & Lineage** — *Relationships* (parents), *Genetics* (the genes that power the Genetics Lab), and *Pedigree*.
- **Media & Files** — *Gallery* and *Attachments*.

Editing details

- 1 On the **Details** tab, click **Edit Details**.

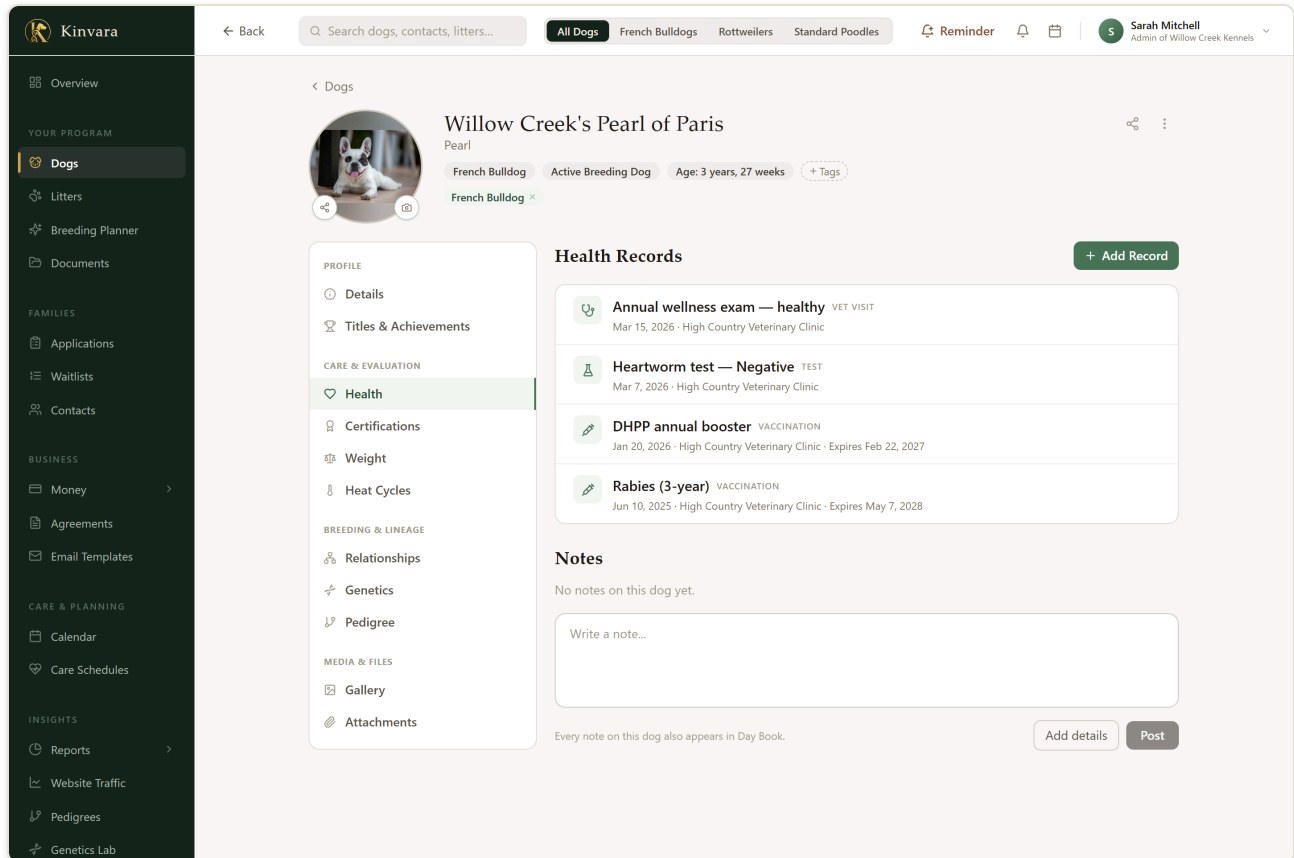
- 2 The **Edit Dog Details** panel opens with the full record — name, type, sex, dates, breed, color, size, microchip, two registration fields, generation, coat, color genes, collar color, height, fertility, market status, sale price, and a description. Fill in as much as you like; it can all change later.
- 3 Save. You can also use the **:** menu on the profile for quick actions like *Copy link* or *Edit details*, and the **+ Tags** button to set the dog's program (Chapter 7).

GOOD TO KNOW

The Details tab also has a small **website publishing** panel — when you're ready to show a dog publicly, you can preview and publish it to your connected site right from here, choosing whether to include photos, price, and health records.

Health, vaccinations & certifications

Every shot, worming, vet visit, weight, and health certification lives on the dog it belongs to — one tidy medical history per dog, forever findable, and ready to print or share when a family or a vet asks. No more digging through a folder of paper.



A dog's Health tab — vaccinations, treatments, and vet visits in one timeline.

Adding a health or vaccination record

- 1 Open the dog and choose **Health** in the left rail (under *Care & Evaluation*).
- 2 Click **Add Record**.
- 3 Choose the **Type** — Vaccination, Test, Treatment, Deworming, Medication, Vet Visit, or Other — and give it a **Title** ("*Rabies (1-year)*").
- 4 Add the **Date administered** and, if you like, an expiry date, who administered it, the lot or batch number, and notes. You can even attach a document.
- 5 Save. The record joins the dog's timeline.

Weights & certifications

The **Weight** tab keeps a dated growth record — click **Add Weight** whenever the dog's on the scale, and over time it becomes a growth curve. The **Certifications** tab is for formal testing: click **Add** to record OFA hips and elbows, eye and cardiac exams, or a DNA panel — the registry, certification number, result, and status. When a thoughtful buyer asks “are the parents health tested?”, it's all one click away.

TIP

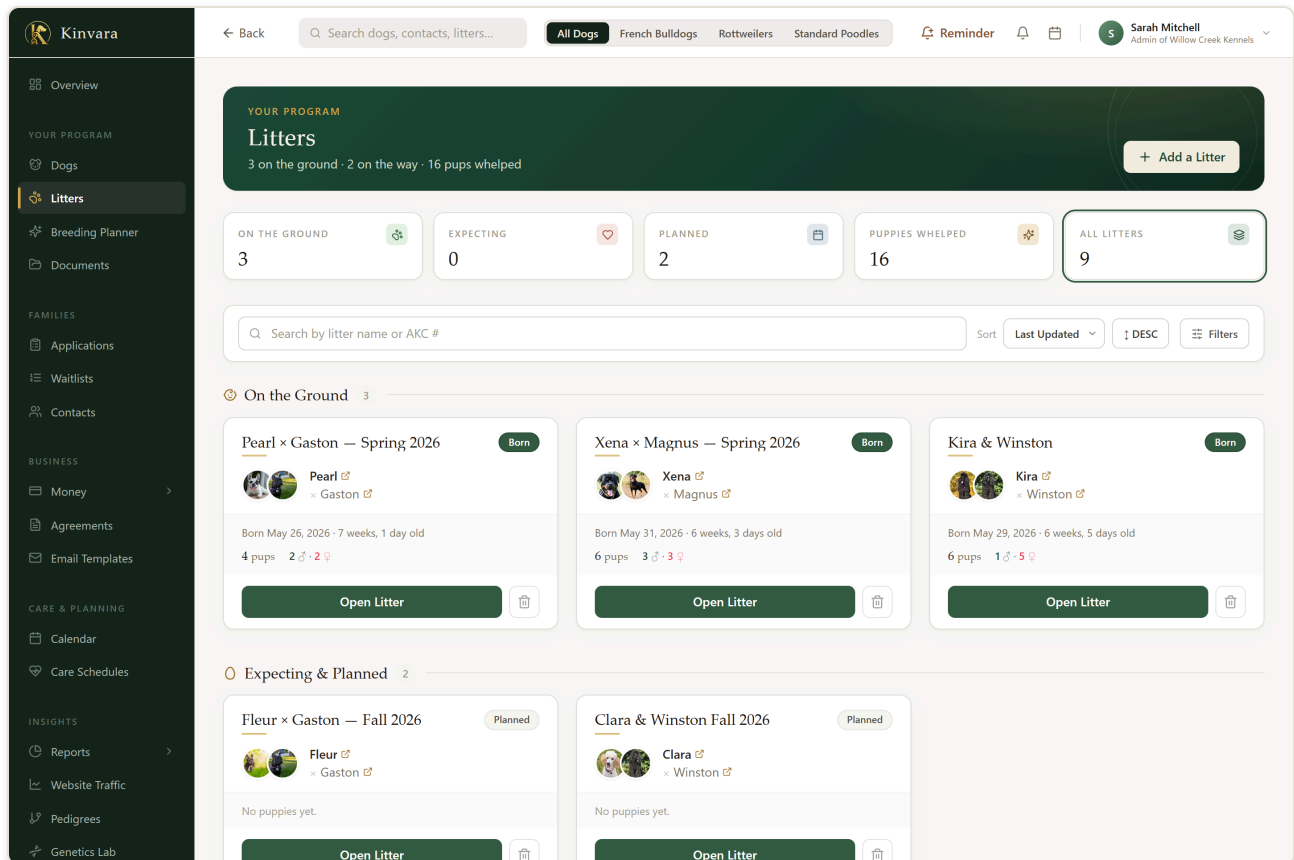
Enter records the day they happen — rabies certificate in hand, type it in before it hits the drawer. Thirty seconds now saves the “where is that certificate?” hunt two years from now.

GOOD TO KNOW

Litters have their own *shared* health & vaccination timeline for puppy rounds — so you never type the same puppy shot six times. That's Chapter 17.

Creating a litter & adding puppies

A litter in Kinvara follows the real story: first it's *planned*, then *expecting* once the breeding takes, then *born* — and every puppy becomes its own little record you can track all the way to their new family.



The Litters page — grouped into On the Ground, Expecting & Planned, and Past.

Creating a litter

- 1 Open **Litters** and click **Add a Litter**.
- 2 Give it a **Litter Name** you'll recognize — many breeders use the parents' names (“Korie & Willie — Summer 2026”).
- 3 Set the **Status** (Planned, Expecting, Born, Completed), the **Birth Method**, the **Date Bred**, and — once they arrive — the **Date Born**. The date bred lets Kinvara estimate the due date.
- 4 Add a **Description / AKC Litter #** if you have one, and click **Add Litter**.
- 5 Open the litter and use **Edit Details** to choose the **Sire** and **Dam** from your dogs.

Adding puppies

A litter's Puppies tab — add each pup, then Manage their status as families choose.

- 1 Open the litter and go to the **Puppies** tab. Click **Add Puppy**.
- 2 Enter an optional name/ID, the **Sex**, a **Collar color** (so everyone knows who's who before names exist), and coat color. Click **Add Puppy**; repeat for the litter.
- 3 As families choose, click **Manage** on a puppy to set its **Market Status** — Available, Reserved, Deposit Paid, Sold, Gone Home, Keeper, or Not for Sale — and link the **Owner** from your contacts. These statuses feed your sales reports automatically.

GOOD TO KNOW

A litter's page has more tabs than just Puppies — *Waitlist, Aptitude, Health & Vax, Journey, Events, Gallery, Attachments, and Finances* — so the whole story of a litter lives in one place. The next two chapters cover the two you'll use most.

The litter health & vaccination timeline

This is one of the quietly wonderful parts of Kinvara. Open a litter's **Health & Vax** tab and you record a care round *once* for the whole litter — not six times for six puppies.

The screenshot shows the Kinvara app interface. On the left is a dark sidebar with navigation icons and labels: Overview, YOUR PROGRAM (Dogs, Litters, Breeding Planner, Documents), FAMILIES (Applications, Waitlists, Contacts), BUSINESS (Money, Agreements, Email Templates), CARE & PLANNING (Calendar, Care Schedules), INSIGHTS (Reports, Website Traffic), Pedigrees, and Genetics Lab. The main area is titled 'Litters' and shows a specific litter: 'Pearl x Gaston — Spring 2026'. It includes a photo of a puppy, the parents' names (Gaston and Pearl), and a 'Born' status. Below this is a 'Health & Vaccinations' section with a timeline of events. The timeline includes: 'May 26, 2026 Whelped' (Planned C-section — 4 healthy puppies), 'Jun 9, 2026 Dewormed with Pyrantel Pamoate Suspension', 'Jun 23, 2026 Dewormed with Pyrantel Pamoate Suspension', 'Jun 30, 2026 Vet exam' (Well-puppy exam — all puppies healthy), 'Jul 7, 2026 Dewormed with Pyrantel Pamoate Suspension', 'Jul 7, 2026 Vaccinated with DHPP (first puppy shots)', and 'Jul 9, 2026 Microchipped (HomeAgain)'. Above the timeline are one-click buttons for '+ Dewormed - Pyrantel', '+ Dewormed - Safe-Guard', '+ Vaccine - Spectra 5', '+ Dewclaws & tail', '+ Whelped', and '+ Microchipped'. There are also buttons for 'Print Record' and '+ Add Record'. A sidebar menu on the left of the main content area lists: LITTER (Details, Puppies, Waitlist), TRACKING & WORKFLOW (Aptitude, Health & Vax, Journey, Events), MEDIA & FILES (Gallery, Attachments), and FINANCIALS (Finances).

Health & Vax — the litter's shared care timeline, with one-click buttons for common rounds.

Recording a care round

- 1 Do the round — say, the two-week deworming.
- 2 Open the litter → **Health & Vax** and click the matching one-click button (" + Dewormed – Pyrantel," " + Vaccine – Spectra 5," " + Microchipped"), or **Add Record** for anything custom.
- 3 When puppies go home, use **Print Record** — every family gets a clean take-home health & vaccination record. Families frame these; vets love them.

TIP

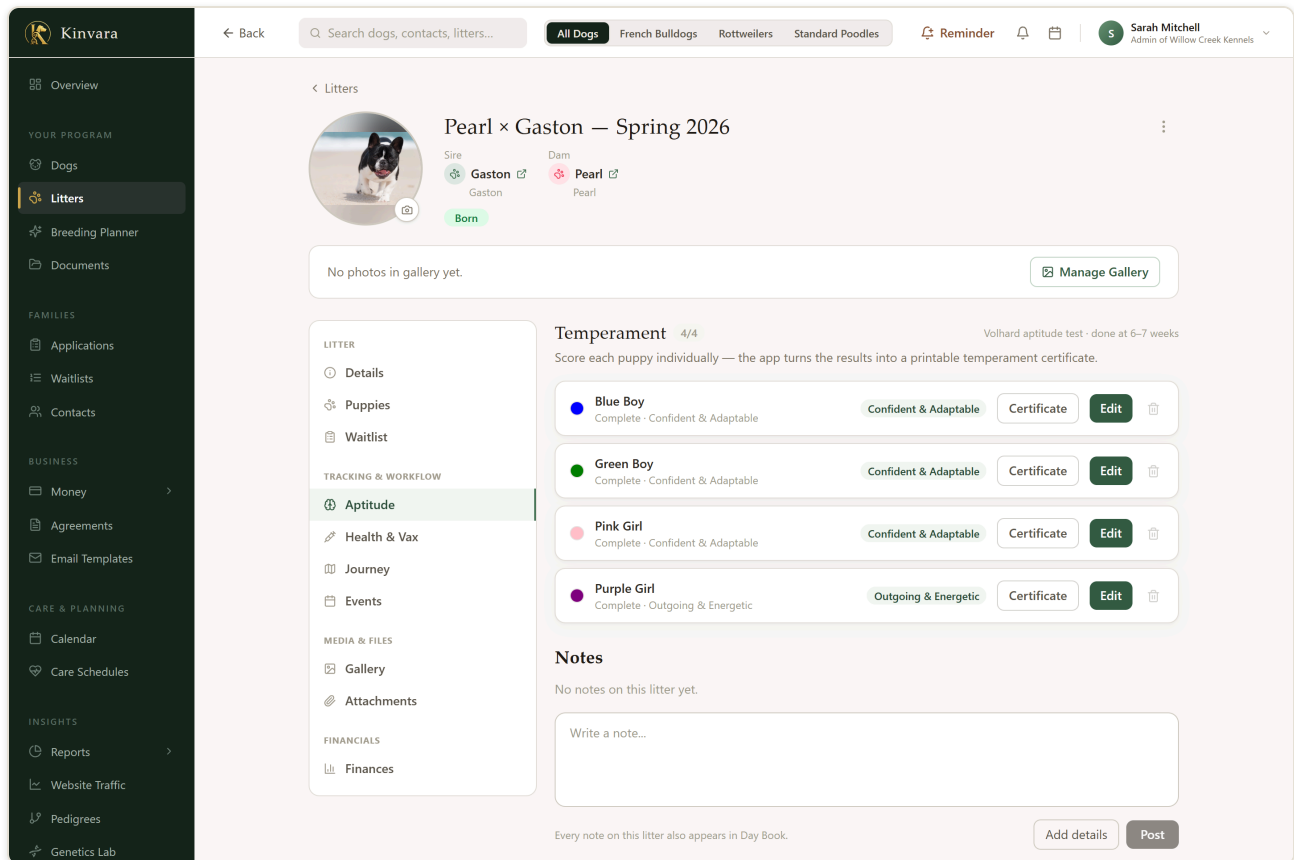
Record the birth the day it happens, even if you fill in details later. The date of birth is what lays out this whole care timeline, the go-home estimate, and the birthday reports.

GOOD TO KNOW

Want the whole schedule laid out in advance — reminders that tell you when the next round is due? That's what **Care Schedules** and the litter's *care protocol* do, in Chapter 20.

Temperament testing

The **Aptitude** tab is your temperament-testing worksheet, built around the Volhard puppy aptitude test (done at 6–7 weeks). Score each puppy and Kinvara turns it into a professional, printable certificate for the go-home folder.



Aptitude — score each puppy's temperament test; Kinvara summarizes and certifies it.

Testing a litter

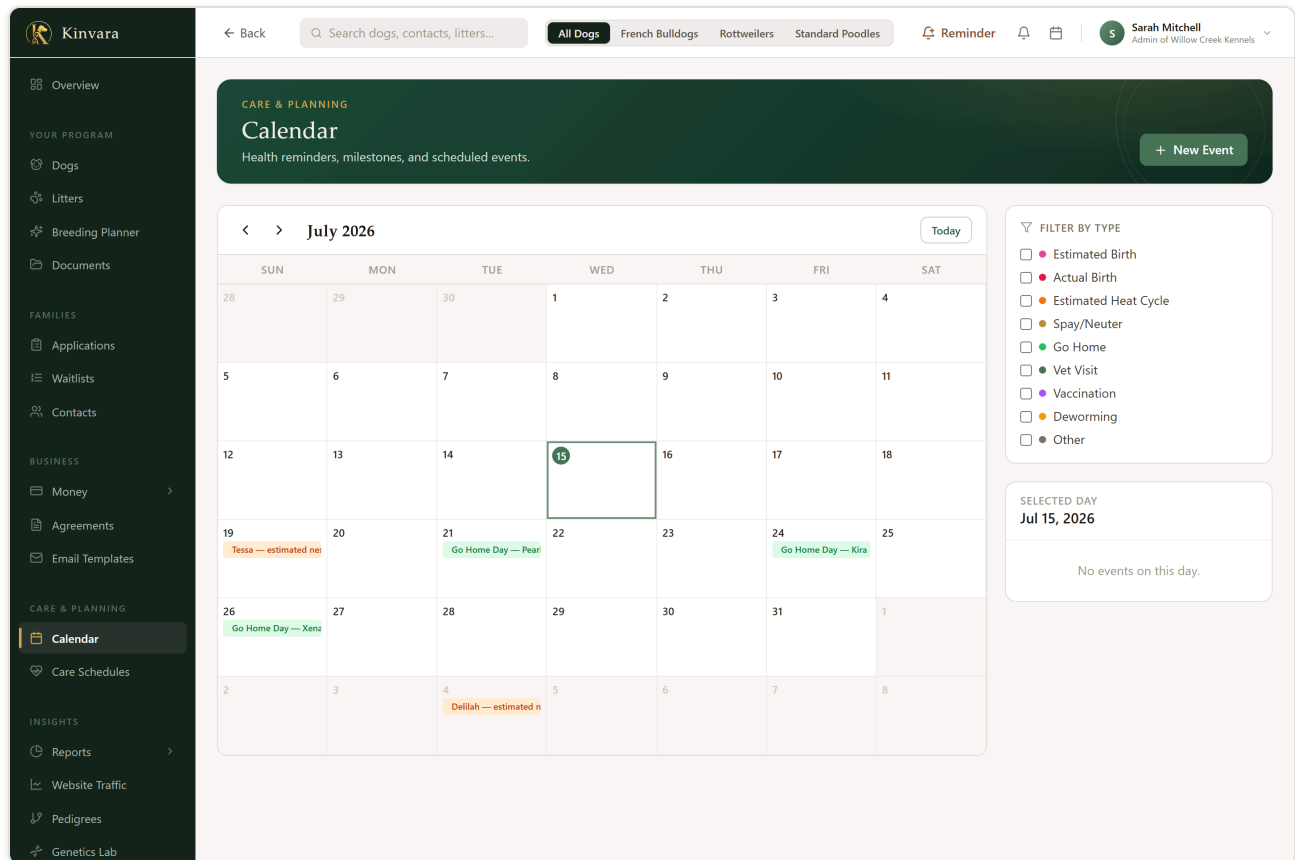
- 1 Open the litter and go to the **Aptitude** tab.
- 2 Run the test with each puppy and click **Score** on their card.
- 3 Rate the categories — social attraction, following, restraint, retrieving, touch and sound sensitivity, and so on.
- 4 Kinvara summarizes the result ("*Confident & Adaptable*") and generates a printable **Certificate** — lovely in every go-home folder, and a real help matching the right puppy to the right family.

TIP

Test in a quiet, unfamiliar room with someone the puppies haven't met, and record each score right after that puppy's turn. The results are only as honest as the setting.

The calendar & heat cycles

The calendar keeps the rhythm of your program: heat cycles, breedings, vet visits, go-home days. The single most valuable habit in Kinvara is recording every heat — the app turns that history into predictions.



The calendar — every event for your whole program in one place.

Recording a heat cycle

- 1 Open **Calendar** and click **New Event**.
- 2 Give it a **Title** and choose the **Type** *Estimated Heat Cycle* (the type list also includes Estimated/Actual Birth, Spay/Neuter, Go Home, Vet Visit, Vaccination, Deworming, and Other).
- 3 Pick the **Date** (and time, or tick *All day*), and attach the relevant **Dog** and/or **Litter**.
- 4 Click **Create** — the event appears on the calendar and on the dog's record.

Once a female has two or more recorded heats, Kinvara learns *her* personal rhythm and projects her next cycles on the Litter Planner (Chapter 21) and the Overview's Coming Up list — so a breeding you're planning six months out is never a surprise.

TIP

Anything with a date belongs here — vet appointments, grooming, go-home days. Use the *Filter by Type* checkboxes on the right to focus on just heats or just births, and mark events done as they pass.

Care Schedules

Where the calendar records what happened, **Care Schedules** plan what's *due*: recurring care — vaccinations, deworming, flea/tick, health checks, grooming — for a dog, a litter, or all your dogs, with Kinvara nudging you when each one comes up.

Care Schedules — recurring care with due dates, plus a reusable litter care protocol.

Creating a schedule

- 1 Open **Care Schedules** and click **New Schedule**.
- 2 Give it a **Name** and a **Care type** (Vaccination, Deworming, Flea/Tick, Health Check, Grooming, Feeding, Other).
- 3 Choose what it **Applies to** — A Dog, A Litter, or All Dogs — and pick the dog or litter if needed.
- 4 Set the cadence with **Every** + Daily/Weekly/Monthly/Yearly, and a **Next due** date.
- 5 Click **Create**. The summary tiles up top (Active, Overdue, Due in 7 days, Total) keep you honest, and each row has *Done*, *Pause*, and *Edit*.

The litter care protocol

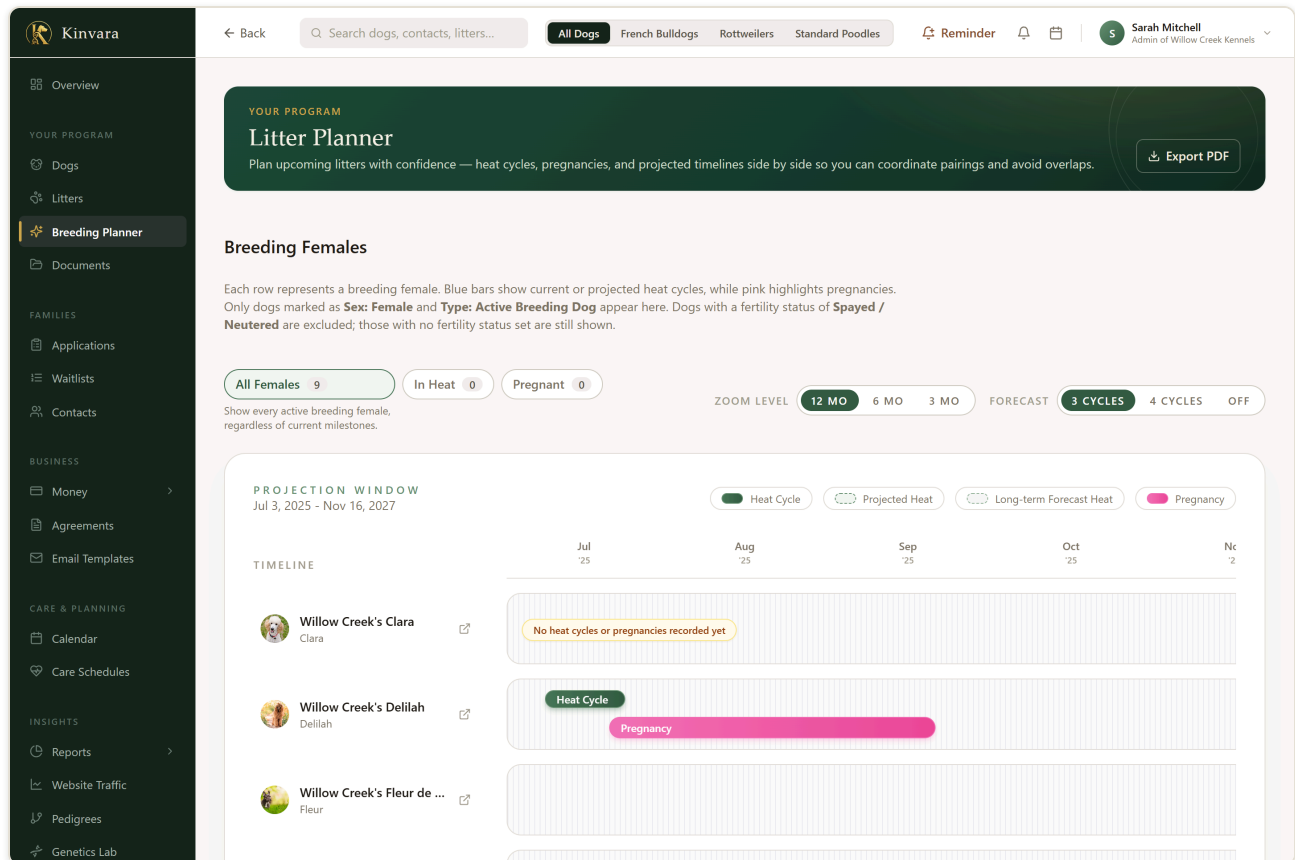
Expand the **Litter Care Protocol** panel and you can build (or *load a starter protocol* for) the standard sequence of puppy care by age — deworming rounds, first shots, dewclaws, microchips. Apply it to a litter and every task lands on the calendar at the right age automatically. It's the planning companion to the one-click timeline in Chapter 17.

GOOD TO KNOW

If you don't see Care Schedules in the sidebar, it's simply switched off — turn it on under **Settings** → **Program Setup** → **Tools**.

The Litter Planner timeline

The Litter Planner (the sidebar calls it the *Breeding Planner*) draws each breeding female on a timeline: her past heats, her pregnancies, and — the clever part — her *projected* future heats, learned from her own history. It's your year, visible at a stretch.



The Litter Planner — one row per female; heats, pregnancies, and forecasts as bars.

Reading the bars

- **Heat Cycle** — a recorded heat that actually happened.
- **Pregnancy** — from date bred to birth (or to the estimated due date, if she hasn't whelped yet).
- **Projected / Forecast Heats** — Kinvara's estimate of her next cycles, based on her personal average gap between heats, so you can plan pairings a year ahead.

Use the **All Females / In Heat / Pregnant** tabs to filter, the **Zoom Level** control (12 / 6 / 3 months) to change the span, and the **Forecast** control to show 3 or 4 future cycles. **Export PDF** prints the whole plan.

TIP

The forecasts are only as good as your records — every heat you log (Chapter 19) makes the projections smarter. With two or three logged cycles per female, they get impressively close.

Contacts — your families

Contacts is your address book of puppy families, past and future: names, emails, phones, where they live, and — because it's connected to everything else — what they've paid, what they've signed, and which dog went home with them.

FAMILIES

Contacts

36 contacts - every family, vet, and partner your program touches

Import CSV Export Add Contact

ALL CONTACTS 36 CUSTOMERS 10 PROSPECTS 6 DEPOSITS IN 0 STATES 4

SEARCH & FILTER

SEARCH

ARCHIVED

Non-Archived More filters

NAME	EMAIL	PHONE	PAYMENTS	STATE	CITY	ACTIONS
ML Avery Thompson	family34@example.com	(555) 014-2368	\$2,500.00	NC	Raleigh	
LA Jordan Bailey	family34@example.com	(555) 014-2368	\$4,000.00	SC	Columbia	
RM Casey Morgan	family32@example.com	(555) 014-2368	\$2,500.00	NC	Cary	
AN Riley Parker	family35@example.com	(555) 014-2368	\$2,500.00	NC	Concord	
EB Ellis Monroe	family35@example.com	(555) 014-2368	\$2,500.00	NC	Boone	
JC Tatum Wells	family36@example.com	(555) 014-2368	\$2,500.00	NC	Asheville	
OD Hollis Grant	family36@example.com	(555) 014-2368	\$500.00	NC	Hickory	
ME Finley Hayes	family35@example.com	(555) 014-2368	\$500.00	NC	Charlotte	

Contacts — every family, with payment status at a glance. (Names shown are fictional.)

Adding a family

- 1 Open **Contacts** and click **Add Contact**.
- 2 Enter their **First Name** (required), plus last name, email, phone, and address if you have them.
- 3 Choose a **Type** — Prospective Buyer, Customer, Co-Owner, Guardian Home, Veterinarian, or Other.
- 4 Click **Add Contact**. They can now be attached to waitlists, invoices, agreements, and puppies.

Bringing families in and out

Already have families in a spreadsheet? **Import CSV** pulls them in all at once (there's a template to download). **Export** hands your list back as a spreadsheet whenever you want it — your data is never

locked in. The stat band and the *Where Your Families Are* heatmap give you a quick read on your customer base.

GOOD TO KNOW

When you approve an application (Chapter 24), Kinvara creates the contact for you — most families enter your program without you typing a thing.

Waitlists

Waitlists are the order of the line: who's waiting for a puppy, in what position, and whether their deposit is in. Keep one master list per program, plus lists for specific litters if you prefer.

The screenshot shows the Kinvara application interface. The left sidebar contains navigation links: Overview, YOUR PROGRAM (Dogs, Litters, Breeding Planner, Documents), FAMILIES (Applications, Waitlists, Contacts), BUSINESS (Money, Agreements, Email Templates), CARE & PLANNING (Calendar, Care Schedules), INSIGHTS (Reports, Website Traffic, Pedigrees, Genetics Lab), and a user profile for Sarah Mitchell.

The main content area displays the 'Waitlists' section with a search bar and a '+ New Waitlist' button. Below this, three waitlists are shown:

- Pearl x Gaston — Spring 2026 — Litter Waitlist** (Active)

#	FAMILY	CONTACT	GENDER PREF.
1	Peyton Brooks	family36@example.com (555) 014-2368	—
- French Bulldog Master Waitlist** (Active)

#	FAMILY	CONTACT	GENDER PREF.	DEPOSIT
1	Skylar Dean	family35@example.com (555) 014-2368	—	Paid
2	Marlowe James	family34@example.com (555) 014-2368	—	Paid
3	Tatum Wells	family35@example.com (555) 014-2368	—	Paid
4	Ellis Monroe	family35@example.com (555) 014-2368	—	Paid
5	Hollis Grant	family31@example.com (555) 014-2368	—	Pending — collect
- Standard Poodle Master Waitlist** (Active)

#	FAMILY	CONTACT	GENDER PREF.	DEPOSIT
16				\$5,100.00

A waitlist ledger — positions, preferences, and deposit status. (Names shown are fictional.)

Setting up a waitlist

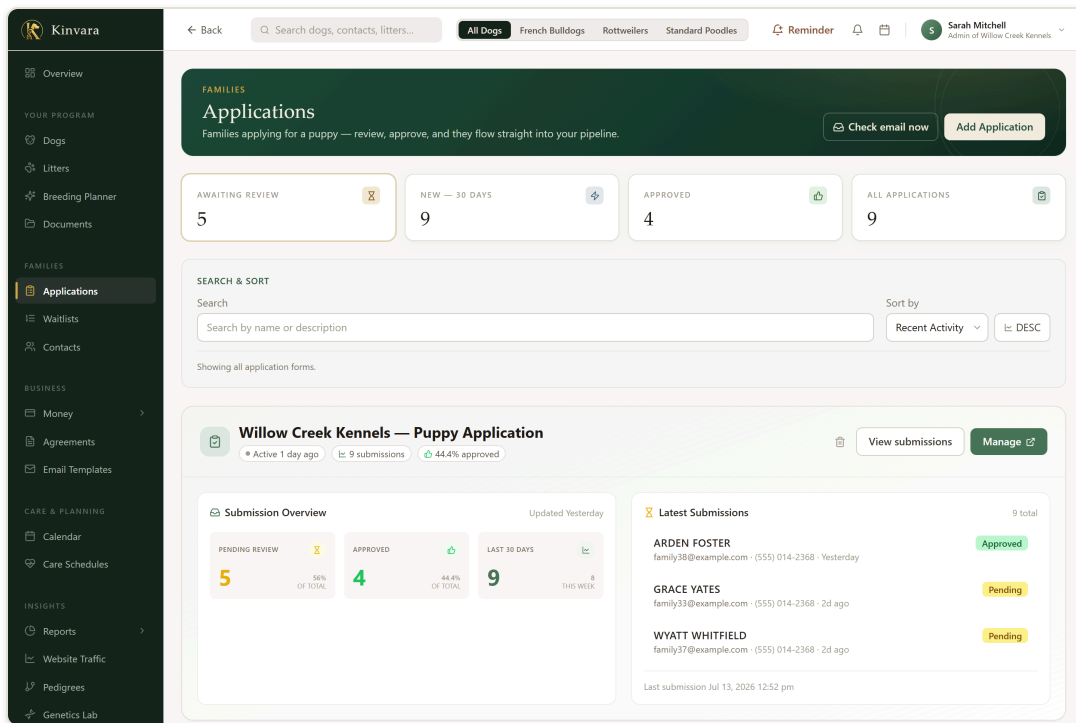
- 1 Open **Waitlists** and click **New Waitlist**. Give it a **Name** ("Poodle Master Waitlist"), and set whether it **requires a deposit**, the deposit amount, and currency. Click **Create**.
- 2 On the list, click **Add family** and choose a contact. Each one takes the next position in line. Add notes for their preferences (gender, color).
- 3 When a family pays their deposit, use the deposit buttons in their row — *Collect deposit* → *Pending* → *Paid* — so the list always shows deposits in versus families in line.

TIP

Keep one *master* waitlist per program rather than a list per litter — families roll forward naturally if they pass on a litter, and their position stays honest.

Applications

Applications are how new families ask for a puppy — they arrive here from your website's form (Chapter 9) or by email intake. Reviewing one takes a minute: read, decide, approve or decline.



Applications — awaiting review front and center. (Names shown are fictional.)

Reviewing an application

- 1 Open **Applications**. The stat band shows **Awaiting Review** first; click it to see who's waiting.
- 2 Open a submission to read the family's answers. You can *Go to Contact* or *Print PDF*.
- 3 Click **Approve** if they're a fit — or **Decline**. Approving kicks off the automated pipeline in the next chapter.

Your application form(s)

Each form has a **Manage** button where you set its name, description, submit-button text, and accent color — and turn on email intake with a subject keyword if inquiries come by email. You can run more than one form (say, one per program) with **Add Application**.

GOOD TO KNOW

Approving an application does far more than change a status — it creates the contact, stages the agreement, and (with email on) sends the approval letter. That's the pipeline, and it's worth its own chapter.

From application to going home — the automated pipeline

This is the chapter that changes how much of your evening you spend on paperwork. Kinvara is designed so the entire journey — a family discovering you, applying, being approved, signing, paying, and landing on your waitlist — runs itself, with you making exactly one decision: *yes or no*.

The journey, end to end

- 1 A family applies on your website.** Your own site keeps its look — the application form (Chapter 9) connects to Kinvara behind the scenes, and every submission flows straight into your Applications page. No copying from emails, no lost inquiries.
- 2 You read it and click Approve.** That single click is your whole job. Kinvara immediately creates the family's contact record, tags them as an approved applicant for the right program, and stages their reservation agreement as a draft.
- 3 The approval email goes out by itself.** Your own words (from your email templates, Chapter 29), branded to your kennel, sent from your kennel's email address (Chapter 10) — with a button inviting the family to move forward.
- 4 The family signs and pays online.** The button opens their private reservation page: your agreement to review and sign electronically (typed name + consent — legally recognized), then a secure card payment for the deposit through your own Square account (Chapter 8). No checks in the mail, no printing.
- 5 The waitlist updates itself.** The moment the agreement is signed *and* the deposit is paid, Kinvara marks the agreement Signed, records the payment in your ledger, and places the family on the correct waitlist in the next position — it can even update the public waitlist on your website.

Add it up: the family had a smooth, professional experience from first click to confirmed spot — and you touched the process once. Everything you saw in Chapters 22 through 24 (the contact, the waitlist entry, the payment, the agreement) was created and connected automatically, so every report and page in Kinvara already knows about it. That's the Kinvara promise in one sentence: **the paperwork runs itself, so your time goes to the dogs — not the desk.**

TIP

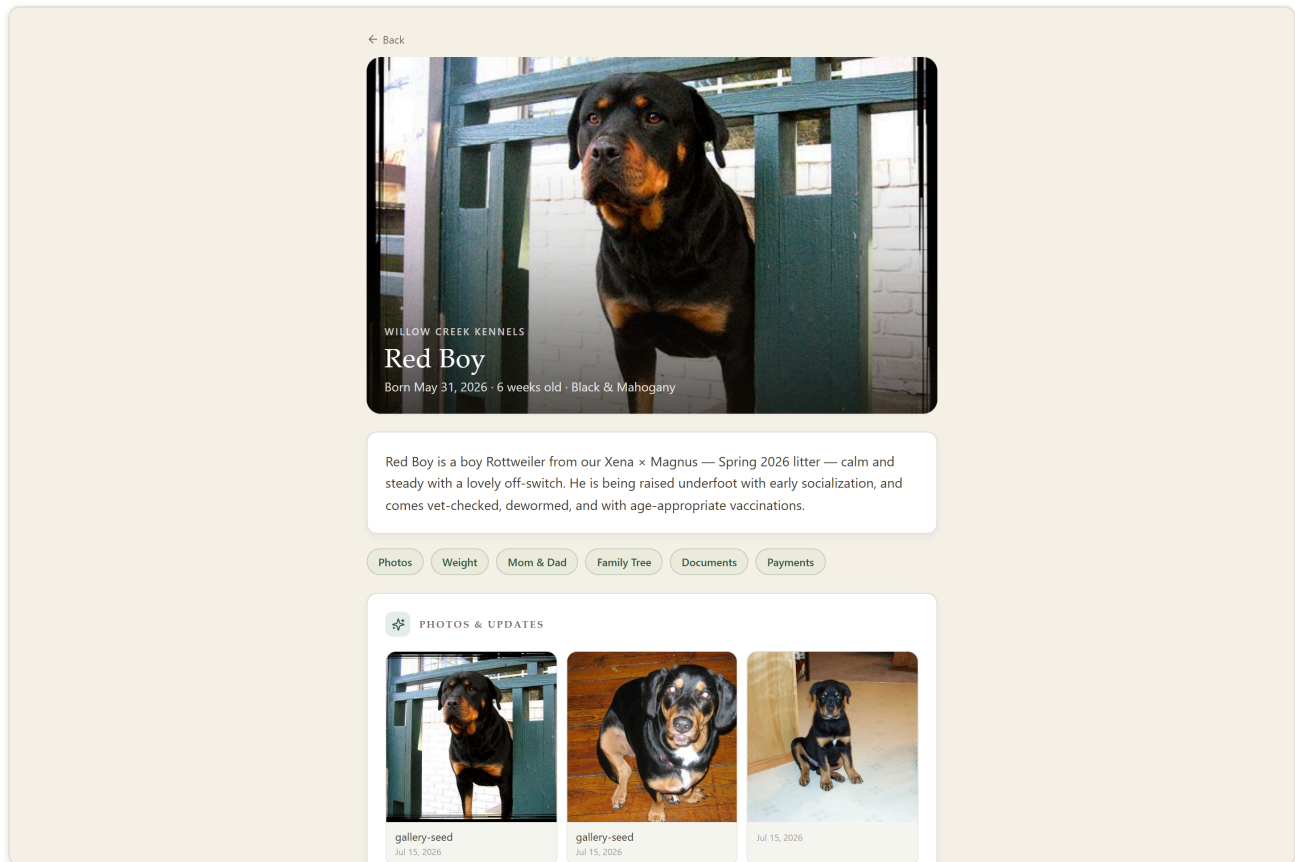
The pipeline uses the pieces you set up in Part II — your email sender (Chapter 10), your Square account (Chapter 8), and your templates (Chapter 29). Set those up once and the whole chain just works.

ON CAMERA

This is your flagship video. Film a real application arriving, the single Approve click, then cut to the family's phone: the email, the sign screen, the card payment, and finally the waitlist position appearing — the whole loop in two minutes.

The Buyer Portal — the family's experience

You built the Buyer Portal in Chapter 11; here's how a family actually uses it, and how you invite them. Each family gets a private, branded page for their puppy — the modern, delightful version of the go-home folder.



A family's portal — photos, weights, health records, family tree, documents, and payments.

Inviting a family

- 1 Open the family's **contact** record. At the top of their Details you'll see the portal card, showing *Not invited*.
- 2 Click **Invite & email** (or **Create invite link** if you haven't set up email). Kinvara emails the family a private, single-use link.
- 3 You can **Send a fresh link** any time, or **Remove access**. You can also invite from a puppy's dog page once it has an owner — the button reads *"Invite [name] to the portal."*

What the family sees

The family clicks their link and lands on a branded dashboard with their puppy and a “*Going home in N days*” countdown. Inside their puppy's hub are the sections you turned on: **Photos & Updates, Weight, Videos, Temperament, Health Records, Mom & Dad, Family Tree, Documents** (the go-home packet), **Payments**, and **Pickup**. They can **Review & sign** their agreement right there, see their **Balance due**, and pay by card or your other methods.

GOOD TO KNOW

When a family signs in the portal, you can **countersign** from your Contracts page, and both copies are stored with the signing details. It's a clean, professional record for both of you.

Money — invoices & payments

The Money area — titled **Invoices** — is your ledger: every deposit and final payment, who owes what, and what's already collected, connected to the family and the puppy it belongs to.

The screenshot shows the Kinvara Invoices page. The left sidebar contains navigation links: Overview, YOUR PROGRAM (Dogs, Litters, Breeding Planner, Documents), FAMILIES (Applications, Waitlists, Contacts), BUSINESS (Money, Invoices, Agreements, Email Templates), CARE & PLANNING (Calendar, Care Schedules), and INSIGHTS (Reports, Website Traffic, Pedigrees). The main content area has a top bar with a search bar, filters (All Dogs, French Bulldogs, Rottweilers, Standard Poodles), and a Reminder icon. Below this is a 'BUSINESS Invoices' header with a '+ New Invoice' button. The dashboard features four summary cards: COLLECTED, ALL TIME (\$41,404.84, 50 paid invoices), OUTSTANDING (\$38,205.00, 23 awaiting payment), OVERDUE (\$0.00, 0 past due date), and THIS MONTH (\$11,100.00, 22 payments received). A 'SEARCH & FILTER' section includes a search bar, a status dropdown (All), and an 'Overdue only' filter. Below is a table of invoices with columns: INVOICE, BILLED TO, DOG, STATUS, TOTAL, DUE DATE, CREATED / UPDATED, and ACTIONS.

INVOICE	BILLED TO	DOG	STATUS	TOTAL	DUE DATE	CREATED / UPDATED	ACTIONS
Puppy Balance — Finley Hayes	Finley Hayes	Yellow Girl	Unpaid	\$2,000.00	Jul 26, 2026	Jul 13, 2026 10:19 PM Updated Jul 13, 2026	
Puppy Balance — Skylar Dean	Skylar Dean	Green Boy	Unpaid	\$4,000.00	Jul 21, 2026	Jul 13, 2026 10:19 PM Updated Jul 13, 2026	
Puppy Balance — Hollis Grant	Hollis Grant	Yellow Boy	Unpaid	\$2,000.00	Jul 26, 2026	Jul 13, 2026 10:19 PM Updated Jul 13, 2026	
Puppy Balance — Peyton Brooks	Peyton Brooks	Blue Boy	Unpaid	\$4,000.00	Jul 21, 2026	Jul 13, 2026 10:19 PM Updated Jul 13, 2026	
Master Waitlist Deposit	Arden Foster	None	Unpaid	\$300.00	No due date	Jul 13, 2026 1:11 PM Updated Jul 13, 2026	
Puppy Balance — Tatum Wells	Tatum Wells	Red Girl	Paid	Paid in full	Jul 26, 2026	Jul 13, 2026 11:00 AM Updated Jul 13, 2026	
Puppy Balance — Ellis Monroe	Ellis Monroe	Red Boy	Paid	Paid in full	Jul 26, 2026	Jul 13, 2026 11:00 AM Updated Jul 13, 2026	

Invoices — the whole ledger with totals and statuses. (Names shown are fictional.)

Creating an invoice

- 1 Open **Money** → **Invoices** and click **New Invoice**.
- 2 Give it a **Title**, choose the **Type** (Invoice, Deposit, or Balance), the **Amount**, and the **Contact**.
- 3 Set the **Status** — *Pending* if it's owed, *Paid* when the money's in hand.
- 4 Click **Create**. Totals, the Overview money card, and the Income report all update instantly.

Getting paid online

Open an invoice to turn on **online payments** and (with Square connected, Chapter 8) attach a secure *Pay with card* link the family can use from their email or portal. When they pay, Kinvara marks it paid for you.

TIP

Record deposits the day they land. The waitlist deposit column, the Income report, and your own peace of mind all read from this one ledger. The stat band up top — Collected, Outstanding, Overdue, This Month — is your at-a-glance financial health.

Contracts & agreements

The Contracts page (the sidebar calls it *Agreements*) holds your reservation agreements, health guarantees, and co-owns — each linked to the family it's for, with a clear status you can trust at a glance.

TITLE	TYPE	BUYER	DOG	VALUE	STATUS	LAST ACTIVITY
Puppy Sale Agreement — Yellow Girl	Sale	Finley Hayes	Yellow Girl	\$2,500.00	Sent	Sent 4d ago
Puppy Sale Agreement — Blue Boy	Sale	Peyton Brooks	Blue Boy	\$4,500.00	Sent	Sent 3d ago
Puppy Sale Agreement — Green Boy	Sale	Skylar Dean	Green Boy	\$4,500.00	Sent	Sent 3d ago
Puppy Sale Agreement — Red Boy	Sale	Ellis Monroe	Red Boy	\$2,500.00	Signed	Signed Yesterday
Puppy Sale Agreement — Red Girl	Sale	Tatum Wells	Red Girl	\$2,500.00	Signed	Signed Yesterday
Puppy Sale Agreement — Yellow Boy	Sale	Hollis Grant	Yellow Boy	\$2,500.00	Sent	Sent 4d ago
Puppy Sale Agreement — Bordeaux	Sale	Jordan Bailey	Bordeaux	\$4,500.00	Signed	Signed 4mo ago
Puppy Sale Agreement — Colette	Sale	Emerson	Colette	\$4,500.00	Signed	Signed 4mo ago

Contracts — agreements by family and status. (Names shown are fictional.)

Creating a contract

- 1 Open **Agreements** and click **New Contract**.
- 2 Give it a **Title**, a **Type** (Sale, Guardian Home, Co-Ownership, Deposit, Health Guarantee), and choose the **Buyer** and, if relevant, the **Dog**.
- 3 Write or paste the **Body** and **Terms**, set a **Price**, and **Create** it as a Draft.

How statuses move

- **Draft** — written and attached to a family, not yet sent.
- **Sent** — the family has it and you're waiting on their signature. Use *Send / Resend*.

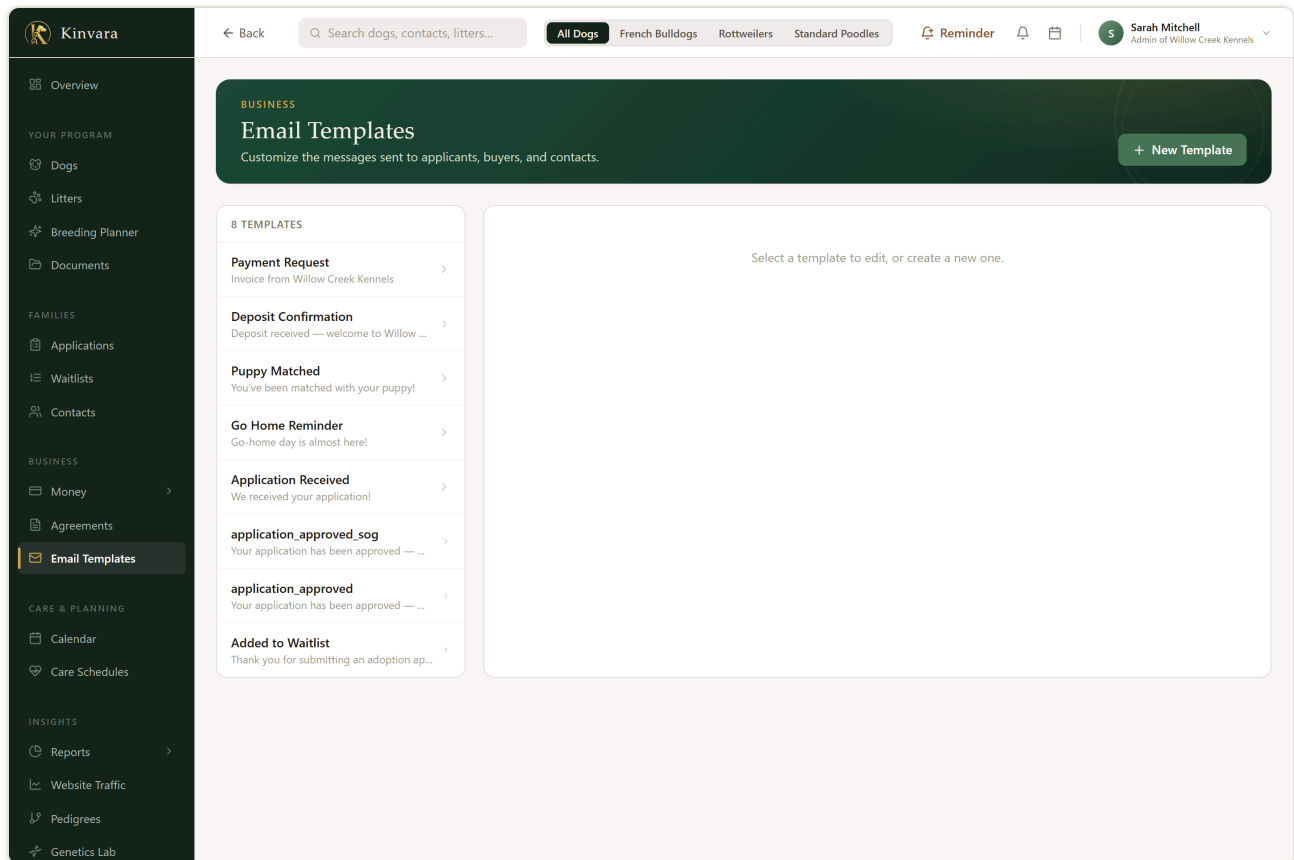
- **Signed** — done. When a family signs in their portal (Chapter 26), you can **Countersign** and the status flips to Signed.

GOOD TO KNOW

In the automated pipeline (Chapter 25), the reservation agreement is created for you as a Draft the moment you approve an application — so most contracts start themselves.

Email templates

Email templates are the letters you send again and again — application approvals, deposit instructions, go-home details — written once, kept polished, and reused forever. They're what the automated pipeline sends on your behalf.



Email templates — your standard letters, with live preview and automation.

Working with templates

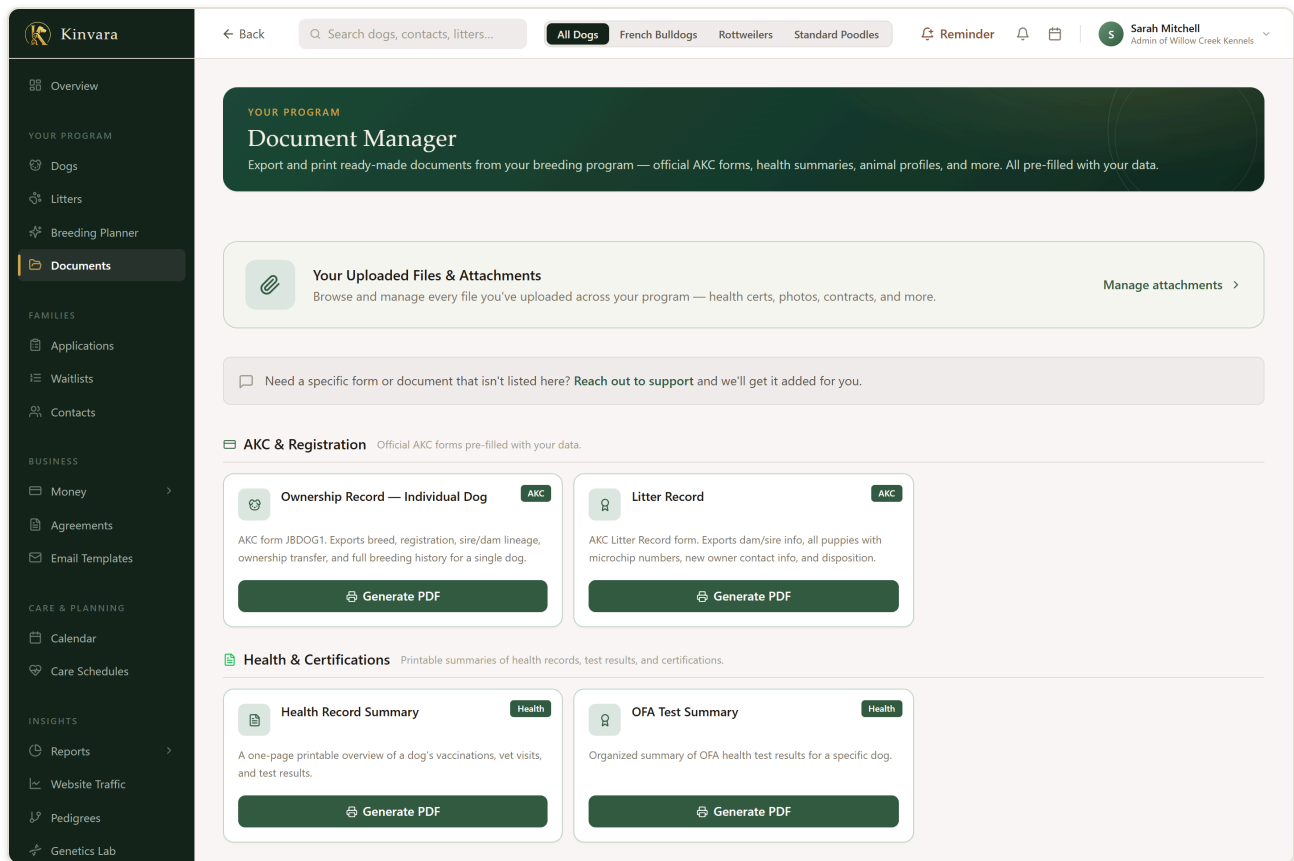
- 1 Open **Email Templates** and click **New Template**. Pick a type — Application Received, Added to Waitlist, Deposit Confirmation, Puppy Matched, Go Home Reminder, Contract Request, or Payment Request.
- 2 Write the **Subject** and the **HTML Body**. Placeholders like the family's first name fill in automatically. A live **Preview** shows the result.
- 3 Under **Automation**, tick *Auto-send this email when its event fires* and *Active* to let the pipeline send it for you. Use **Send a test** to email yourself a copy, then **Save**.

TIP

Write your approval letter first — it's the one the pipeline sends most. Warm, clear, and with a line telling the family to click the button to sign and pay. That single email carries your whole first impression.

Documents & printable records

The Documents page (titled **Document Manager**) generates clean, printable paperwork straight from your records — no retyping into forms.



Document Manager — printable records generated from your data.

What you can generate

- **Ownership Record — Individual Dog** — a filled-out individual dog record: registration, lineage, ownership, ready for transfer paperwork.
- **Litter Record** — the litter with sire, dam, and every puppy listed with sex, color, microchip, and new owner.
- **Your Uploaded Files & Attachments** — everything you've uploaded (photos, scans, signed papers), organized by the dog, litter, or family it belongs to.

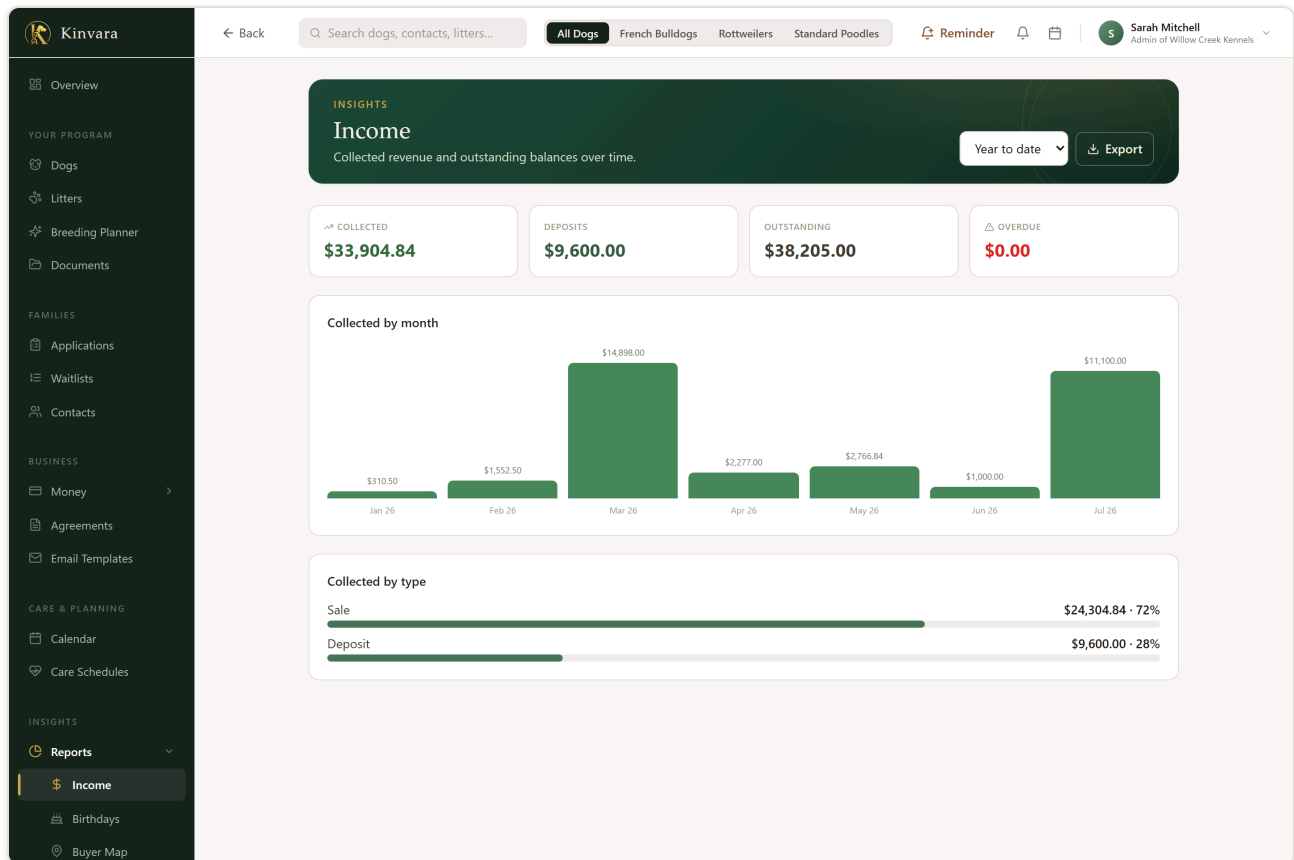
- 1 Open **Documents** and choose a record type, then click **Generate PDF**.
- 2 Pick the dog or litter.
- 3 The document opens formatted for paper — use your browser's print dialog to print it or save it as a PDF.

GOOD TO KNOW

More document types are on the way (some cards show a “Coming Soon” badge). The two above are live today and cover the paperwork most breeders need most.

Reports, the Buyer Map & Website Traffic

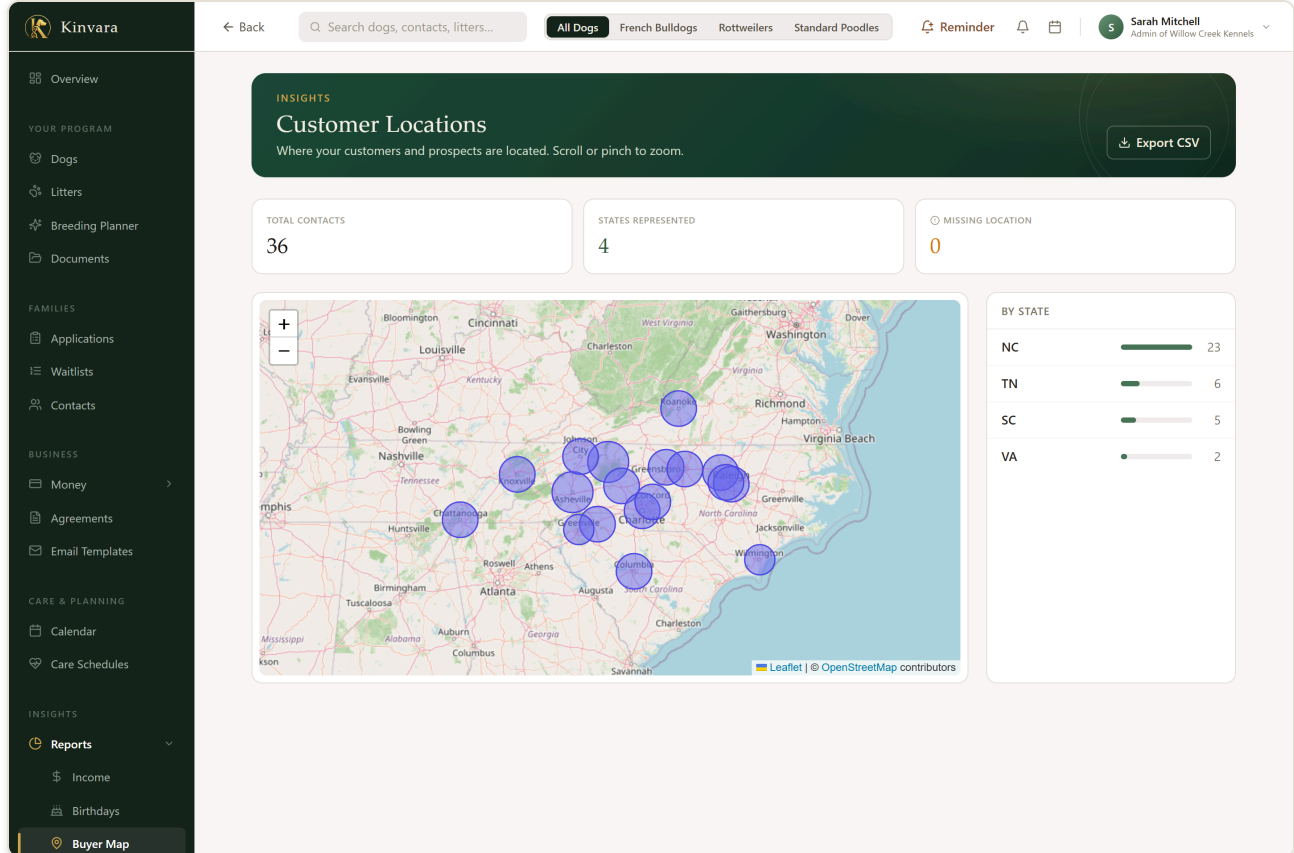
Reports turn your everyday records into answers: how the year is going, what actually sells, whose birthdays are coming, and where your families live. Each opens from **Reports** in the sidebar and offers an **Export**.



The Income report — collected, outstanding, and a month-by-month picture.

The reports

- **Income** — money collected over any period, split by month and type, plus what's outstanding or overdue.
- **Birthdays** — every dog's next birthday, soonest first. A two-line note to a past family is the cheapest marketing you'll ever do.
- **Buyer Map** (Customer Locations) — your families by state, on a map.
- **Sales Mix** (Sales by Puppy Type) — reservations and sales broken down by breed, size, coat, sex, and litter.
- **Active Puppies** — all current puppies with their litter and owner status.



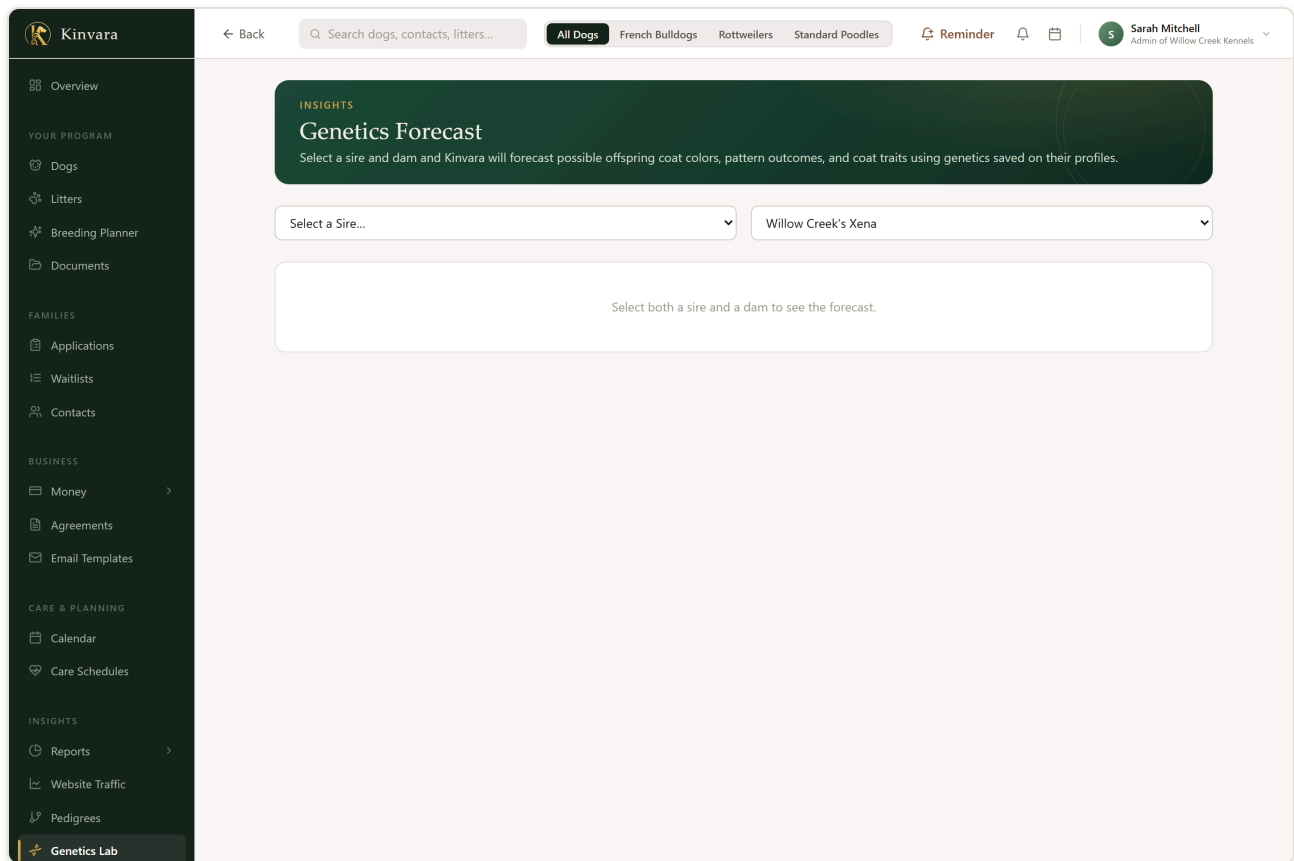
The Buyer Map — where your puppy families are.

Website Traffic

The **Website Traffic** page shows visits to the pages Kinvara serves for you — your application form and family portal — so you can see interest building even before an application lands.

The Genetics Lab & Pedigrees

Two planning tools for thoughtful pairings: the Genetics Lab forecasts a litter's coat colors and traits, and Pedigrees draws the family tree and calculates inbreeding.



Genetics Forecast — predicted colors and traits for a chosen pairing.

The Genetics Lab

- 1 First, make sure both parents have their **Genetics** saved on their dog profiles (the results from an Embark or similar panel — entered once per dog).
- 2 Open **Genetics Lab** and choose a **Sire** and a **Dam** from the dropdowns.
- 3 Read the predicted coat colors, patterns, coat length, furnishings, and curl — each with a probability — plus a pairing COI. Click **Download PDF** for a printable version to share with waitlist families.

Pedigrees & COI

The screenshot shows the Kinvara web application interface. The top navigation bar includes a 'Back' button, a search bar for dogs, contacts, and litters, and tabs for 'All Dogs', 'French Bulldogs', 'Rottweilers', and 'Standard Poodles'. The user is logged in as Sarah Mitchell, Admin of Willow Creek Kennels. The left sidebar contains various navigation options: Overview, YOUR PROGRAM (Dogs, Litters, Breeding Planner, Documents), FAMILIES (Applications, Waitlists, Contacts), BUSINESS (Money, Agreements, Email Templates), CARE & PLANNING (Calendar, Care Schedules), INSIGHTS (Reports, Website Traffic), and Pedigrees (highlighted). The main content area is titled 'Pedigrees' and includes a sub-header 'INSIGHTS'. Below this, there's a 'Pedigree Profiles' section with a search bar and filters for 'In Program' and 'External'. A list of dogs is shown, including 'Willow Creek's Pearl of Paris', 'Willow Creek's Xena', 'Red Boy', 'Red Girl', and 'Willow Creek's Gator'. Each dog has a 'Select' button. Below the list, there's a 'Pedigree Invites' section with a 'Received' and 'Sent' filter. At the bottom, there's a 'Willow Creek's Pearl of Paris Pedigree' section with a 'Share URL' button, an 'Export PDF' button, and a 'DEPTH' dropdown set to '4 generations'.

Pedigrees — pick any dog to explore their tree, COI, and printable pedigree.

- 1 Open **Pedigrees** and pick a dog. Choose the depth — up to six generations.
- 2 Review the tree; ancestors outside your program appear as *external* entries you can fill in. Check the **inbreeding panel** for the COI and common ancestors.
- 3 Click **Export PDF** to print or share a pedigree worthy of a frame.

GOOD TO KNOW

The COI here is pedigree-based — it reflects the ancestors recorded in Kinvara. It's a planning indicator, not a substitute for genomic (DNA-based) diversity testing.

Questions, answers & what's next

Is my data safe? What if I delete something by accident?

Your records live in a professionally managed cloud database with continuous protection and backups, privately walled off per program. Removing a record archives it rather than destroying it — and turning a tool off never deletes anything. You are in far safer territory than a spreadsheet on one laptop.

Can I use Kinvara on my phone?

Yes — it's a website, so it works in your phone's browser, and the layout adapts to small screens. For long typing sessions a computer is comfier; for checking the waitlist from the whelping box, the phone is perfect.

I run two programs. Do I need two accounts?

No — one account handles as many programs as you like. Tag your breeding dogs with each line's name and the program switcher appears automatically (Chapter 7).

Can more than one person help run our program?

Each program has its own sign-in today; family-member and helper accounts with their own logins are on the way (Settings → Users is where they'll live).

The first page load of the day feels slow. Why?

During this early period the app rests between visits to keep costs low while it's being polished. If a first load dawdles, give it a moment — everything after that is quick.

I found something confusing or broken. What do I do?

Tell us! Kinvara improves fastest when breeders say “this made me stop and think.” Every report gets read.

What's coming next

Kinvara grows every week. On the near horizon: team logins for helpers and family, more one-click documents, richer buyer-portal messaging, and deeper reporting. When features land, this guide is updated — the version number on the cover tells you which edition you're holding.

THANK YOU

Kinvara is built by a working breeder, for working breeders — every screen in this guide runs a real program every day. Welcome aboard, and happy breeding. *Breed · Manage · Elevate.*