



Horse Information

Identification

Ownership

Removal

Use / Discipline

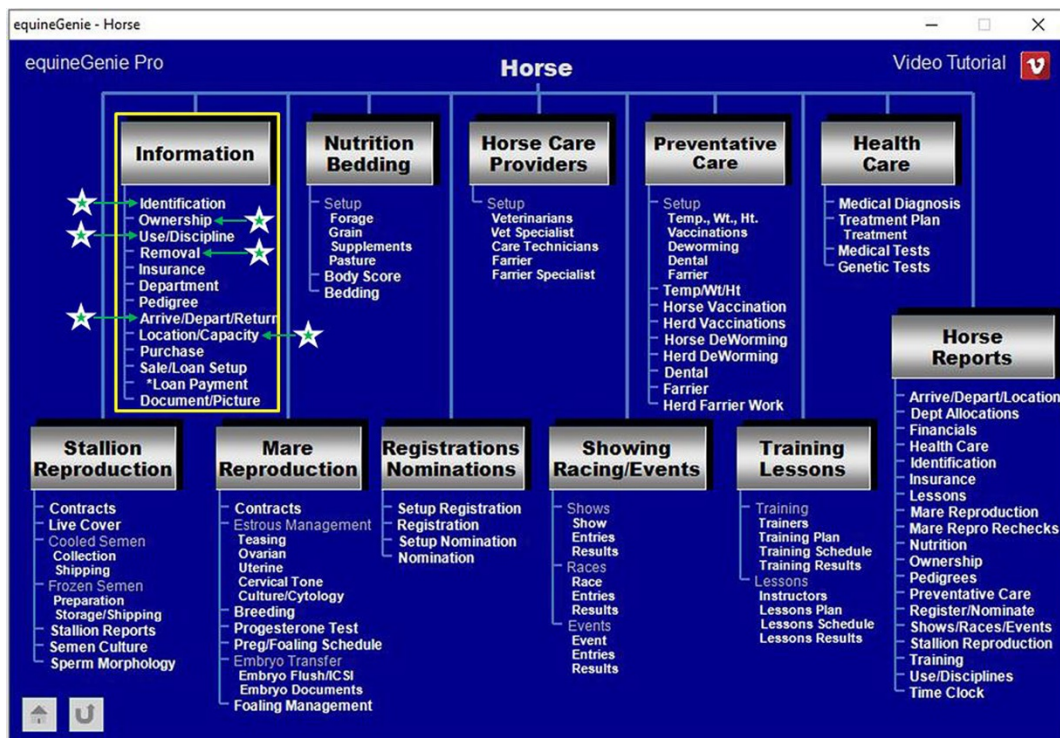
Arrivals/Departures/Return/Change Location

Location/Location Capacity

Horse Information (Part 1)

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Horses Information – Identification

Path: Home: Horses: Information: Identification

There are no prerequisite setups.

Think/Plan before you setup the horses in equineGenie! Enter all the horses that are already part of your business on the Horse Identification screen. However, if a horse's arrival date is important to the business, start entering the horse on the Arrival/Depart/Return screen. (Path – Home: Horse Information: Arrive / Depart / Return) The horse knowledgebase consists of expert information from the AAEP (American Association of Equine Practitioners) and the specific breed registries. The more information you can provide on a horse, the better job equineGenie can do in assisting you managing and caring for the horses in your horse business.

NOTE: If a horse's arrival date is important, start on the Arrive/Depart/Return screen.

Enter/Select Registered or Unregistered Name ①

Sire ② Dam

Barn Name ③ Tattoo/Brand

Identification Number ④ Breeder ID

Breed ⑤ Registration #

Another Registration Remove Breed

Enter/Select Strain Enter/Select Origin

Mare Stallion Gelding ⑥

Markings ⑦ Color

Face Body

Left Leg - Fore Right Leg - Fore

Left Leg - Hind Right Leg - Hind

Birth Date State ⑧ Postal Code

Location On the Farm / Ranch ⑨ Stall #

Horse Picture Locate View Clear ⑩

Return To Arrival / Departure ②

Return To Horse Purchases ③

Identification Comments

Enter ⑪ Video Tutorial

Popup And Red Flag equineGenie Notes

Go To Identify Horse Owner ①

View Selected Horse (Detail) ④

View All Horses (General) ⑤

Caution: If a horse's arrival date is important, start entering the horse on the Arrive/Depart/Return screen. (**Horse Arrival**) If a horse is entered without starting the entry on the Arrive/Depart/Return screen, the arrival date will not be recognized and the horse's entry status will be assigned as initial.

- ① **To add a horse, select** [New Horse] from the 'Enter / Select Registered or Unregistered Name' dropdown and click in the dropdown box and enter the horse's name.

Note 1: Once a horse has been entered it will be displayed in the dropdown list. Selecting a horse that has already been entered will recall that horse's identification information. You can change a horse's identification information after all the previous entries have been displayed.

Hint: An entered horse can be removed from equineGenie. To remove a horse, see the Horse Information – Removal training in this document. (**Remove Horse**)

- ② **Enter** a horse's Sire and Dam in the respective Sire and Dam drop-downs. The Sire and Dam entered are auto learned and can be selected for another horse without having to be reentered. The horse's sire and dam are automatically transferred to the horse's pedigree.
- ③ If a horse has a barn name, **Enter the barn name** in the barn name dropdown. If the horse has an identification number, **Enter its identification number** in the identification number dropdown.

Note 2: a horse's identification number can be a breeding collar number, a microchip number or any other identification number the business elects to use. A horse's identification information can be recalled by selecting any of its names or its identification number on the Horse Information – Identification screen.

- ④ **Select the horse's breed** from the breed dropdown. Selection of a horse's breed directs equineGenie's knowledgebase to information that is unique to the selected breed. Selection of a horse's breed activates the registration number box. If the horse is registered, **Enter the horse's registration number** in the Registration # box. If the horse is registered with multiple registries, **selection of the orange 'Another Registration'** will enter the 1st registration and enable you to select another breed and enter another registration number for the same horse.

Caution: *Very few horses can be registered in more than one breed registry. Be absolutely sure a horse is accepted in more than one breed registry before additional breed registrations are entered.*

Selection of the **'Remove Breed'** button is used to remove a horse's breed. If you need to remove a horse's breed follow the instructions in the **Red Genie Note** on the right side of the **Remove Breed** button.

If a horse has a tattoo or brand, **Enter** the tattoo or brand in the Tattoo/Brand box. If a horse has a breeder ID, **Enter** it in the Breeder ID box.

If there are different strains for the breed of the horse being identified, the horse's strain can be **Entered or Selected** from the Enter/Select Strain dropdown. Strains entered are remembered by equineGenie and do not have to be reentered.

If there are different origins for the breed of horse being identified, the horse's origin can be **Entered or Selected** from the Enter/Select Origin dropdown. Origins entered are remembered by equineGenie and do not have to be reentered.

Note 3: If the horse is a registered horse, it is strongly recommended that you identify its breed. equineGenie can assist you better if a horse's breed is known. The breed dropdown lists more than 80 of the most popular horse breeds. If the breed dropdown does not contain your horse's breed, **it can be added to the breed knowledge base by equineGenie as long as the breed has a verifiable breed registry**. Adding a new breed requires more than just adding the breed name.

- ⑤ Select the horse's gender by clicking on the **Mare, Stallion or Gelding** button.

Note 4: The horse's gender assists equineGenie in recommending the appropriate AAEP preventative care protocols. The gender identification also assists in assigning a horse's use.

- ⑥ Select the horse's Color, and its Face, Body and Leg markings from the respective dropdowns.

Note 5: The information in the horse color and markings dropdowns has been verified with the identified breed's registries. A marking's dropdowns allow for multiple selections. Therefore, only the color selection displays a color. The marking selections do not display a selection. The marking selections appear on the respective horse's information and health reports. To close a marking's dropdown, just click outside the box.

- ⑦ Enter the horse's birth date in the Birth Date box by selecting the date from the calendar icon or entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

Select a state or province in which the horse was born from the State dropdown, if the state or province is known. **See Note 7**

Enter the postal code in the Postal Code box where the horse is currently located.
See Note 8

Note 6: A horse's birthdate assists equineGenie and recommending the appropriate AAEP preventative care protocols.

Note 7: A horse's birth place is optional, but is good to know for horses used in racing. If a horse is foreign-born the abbreviation for the country in which it was born can be added and will be remembered by equineGenie.

Note 8: A horse's postal code is the horse's current location. It assists equineGenie in recommending the appropriate AAEP preventative care protocols.

Example: Horses located in warm humid climates require a different encephalomyelitis vaccine than horses stabled in cold dry climates.

- ⑧ **Enter** the horse's Location in the 'Location on the Farm / Ranch' dropdown where it is currently located on the farm or ranch.

Note 9: A horse's location is important for herd vaccinations, deworming, and farrier work by location. It is also used in the determination of barn / stalls availability or pasture capacity.

- ⑨ **A picture of a horse can be added** to equineGenie by selecting the Locate button to locate the horse's picture file. Selecting open will automatically add it to equineGenie. Selecting the View button allows you to view the horse's picture. Selecting the Clear button will remove the horse's picture from equineGenie. The horse's picture will appear on all reports specific to that horse.

Note 10: A horse's picture needs to have a, 3:2 aspect ratio. This means the horse's picture selected for equineGenie needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2. This is a requirement of Crystal Reports, the report writer used by equineGenie. If a picture does not have the required 3:2 aspect ratio it will appear distorted on reports using the horse's picture. There are many free photo editing software that can be used to edit pictures.

- ⑩ If the horse entered is 100% owned by the business, the business is automatically assigned 100% ownership. If the business does not own the horse, the *"Go To Identify Horse Owner"* button ❶ should be selected. Selection of the **Enter** button saves the horse's identification information in equineGenie and clears the screen.

Note 11: The business ownership must have been entered before any horse ownership can be identified. (*Path: Home: Business Information: Ownership – 1st*)

- 1 **Selection** of the '**Go To Identify Horse Owner**' button saves the horse Identification information in equineGenie, clears the screen and displays the Horse Information – Ownership screen.

Caution: Remember, if the business owns 100% of the horse, equineGenie automatically makes the business the 100% owner of the horse. If the business is not a 100% owner of the horse, but owns some percentage, the '**Go To Identify Horse Owner**' button 1 should be selected.

- 2 If the horse identification was started on the '*Horse Information - Arrive/Depart/Return*' screen, **Selection** of the '*Return To Arrival / Departure*' button saves the '*Horse Information – Identification*' information in equineGenie and displays the '*Horse – Arrivals/Departures/Return/Change Location*' screen.
- 3 If the horse identification was started on the '*Horse Information – Purchase*' screen, **Selection** of the '*Return To Horse Purchases*' button saves the '*Horse Information – Identification*' information in equineGenie and displays the '*Horse Information – Purchase*' screen.
- 4 **Selection** of the '*View Selected Horse (Detail)*' will enable the selected horse's identification information to be viewed, exported and/or printed.
- 5 **Selection** of the '*View All Horses (General)*' will enable all the horses' identification information to be viewed, exported and/or printed.

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Horses Information – Ownership

Path: Home: Horses: Information: Ownership

There is a prerequisite setup required before a horse's ownership can be entered. The business ownership information must have been entered, (Home: Business Information: Ownership – 1st). A horse must be entered in equineGenie, (Horses: Information: Identification). (Horse Identification)

Think/Plan before you assign a horse's ownership! The Horse Ownership screen is used to assign or change a horse's ownership. A horse's ownership assignment is required to bill services and/or products to a horse and Invoice a horse's owner. If the business owns 100% of the horse the Horse Information – Ownership screen ownership information doesn't need to be entered.

Caution: The business ownership, ownership information should be entered on the 'Business Information – Ownership – 1st' screen before a horse's ownership is entered.

① Select the horse from the Horse dropdown.

Note 1: If the Horse Ownership screen is entered from the 'Horse Information – Identification' screen the horse displayed on the 'Horse Information – Identification' screen will be displayed on the 'Horse Information – Ownership' screen.

② Initially, the business owner will be displayed in the Select and Enter Horse Owner/Partner dropdown. If the Business is not the owner of the horse, the horse ownership percentage must be set to '0%' in the Ownership % dropdown ⑤ and the orange **Another Owner / Partner** ⑦ selected to clear the business owner's information. This same procedure needs to be done to change a horse's ownership before the new owner can be entered – see ⑤ below. The exception is when a horse

has multiple owners. The Ownership % ⑤ is set to '0' and Another Owner / Partner ⑦ is selected. Then each owner is selected or entered in the Select or Enter Horse Owner/Partner ② dropdown, their Ownership % ⑤ entered and Another Owner Partner ⑦ selected to enter each horse owner.

Note 2: If a horse has multiple owners, each owner, their contact information ③ and ownership percentage must be entered. See ⑤ below.

③ **Enter** the horse owner's contact information.

Note 3: If a horse's owner is a customer that has been previously entered in equineGenie, their contact information will be automatically displayed when they are selected.

④ **Selecting** the 'Add To Address Book' button will add the horse owner and their contact information to the equineGenie address book.

Hint: The Address Book may allow for more customer/client information to be added. (*Path – Home: Calendar Contacts: Contacts: Address Book*).

⑤ **Assign a horse's ownership** percentage from the Ownership % dropdown. If the ownership percentage is not available in the dropdown it can be manually entered. A percentage can be any percent; e.g. 33.33%, 27.5%, etc. *A horse's total ownership should not exceed 100%.* A horse's Ownership Total is displayed to the right ⑥ of the Ownership % dropdown and increases as each new owner's percentage is assigned. Additional decimal places after the decimal point will increase the ownership accuracy.

For Example: If there are three owners on the same horse, entering 33.333333% increases the accuracy of each owner's percentage and the accuracy of their billing charges.

⑥ **The** total horse ownership percentage for each horse will be displayed.

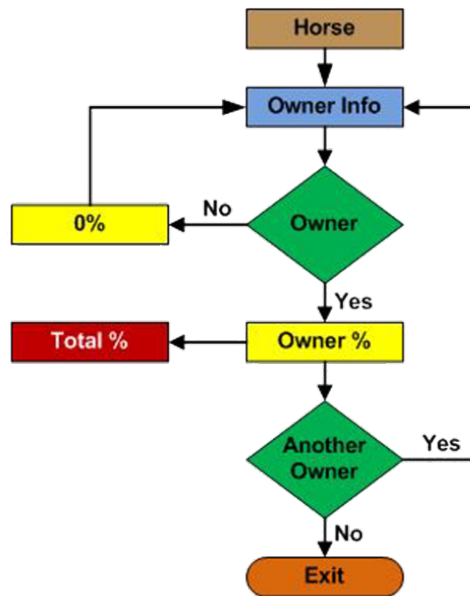
Note 4: A horse's ownership must never exceed 100%.

➡ ⑦ **To change a horse's ownership** set the ownership percentage in the Ownership (%) dropdown to 0%. After setting the Ownership (%) to 0%, select the orange **Another Owner / Partner**. Selecting **Another Owner / Partner** clears the ownership information enabling a new horse owner to be entered. **Assigning a horse's owners** is repeated until all owners and their ownership percentage have been assigned. **See Note 4.**

Note 5: equineGenie automatically splits any horse's charge between its owners based on each owner's ownership percentage. The more accurate the percentage entered, the more accurate the customer billing.

Note 6: If you need to remove a horse owner, it can be removed by displaying the horse, its owner, and owner's contact information and the owner's ownership percentage. You then set the horse's Ownership % ⑤ to '0' and select Enter. ⑧

Horse Ownership Process Flow



- ⑧ **Select Enter** before leaving the '*Horse Information – Ownership*' screen if the '*Return To Arrival / Departure*' or '*Go To Customer / Client Information*' buttons are not selected.
- ① **Select** the '*Return To Arrival / Departure*' button if the horse ownership input is from a new arrival horse. Selecting '*Return To Arrival / Departure*', enters the '*Horse Information – Ownership*' screen information and displays the '*Horse – Arrival/Departure/Return/ Change*' Location screen.
- ② **Select** the '*Go To Customer / Client Information*', if the horse owner entered is a customer/client that had not been previously entered. Selecting '*Go To Customer / Client Information*', enters the '*Horse Information – Ownership*' screen information and displays the '*Customer / Client – Information*' screen. Selecting this button will enable you to add additional information about a new customer/client.
- ③ **Selection** of the '*Selected Horse Ownership*' enables the selected horse's ownership information to be viewed, exported and/or printed.
- ④ **Selection** of the '*Horse Ownership - Horses*' enables all horse ownership information to be viewed, exported and/or printed.

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Horses Information – Use / Discipline

Path: Home: Horses: Information: Use/Discipline

There is a prerequisite setup required before a horse's use / discipline can be assigned. A horse must be entered in equineGenie, (Horses: Information: Identification. (Horse Identification)

Think/Plan before you assign a horse's use / discipline! The Horse Use/Discipline screen is used to identify how a horse is used and the way it is used. A horse's use/discipline assists in identifying the correct preventative care protocols. A horse's use/discipline is also used to filter the horse dropdown lists in other horse task and activity areas such as reproduction, showing, training and lessons.

equineGenie Horse Information - Use / Discipline

Horse Use / Discipline

Select Horse ①

Horse Use

Select Use ②

Horse Discipline

Select Discipline ③

A horse's use and discipline assists the veterinarian knowledge base in making horse health and care recommendations. The use and discipline entries also assign a horse to specific task and activity dropdowns.

☐ View Selected Horse Uses/Disciplines ①

☐ View All Horse's Uses/Disciplines ②

Horse Use Comments

Horse Discipline Comments

④

Popup And Red Flag
equineGenie
Notes

① **Select** the horse from the Select Horse dropdown.

② **Select** the horse's use from the Select Use dropdown.

Note 1: Selecting a horse's Use identifies how the business uses the selected horse. A horse's Use assists the AAEP knowledgebase in recommending the appropriate preventative and health care protocols.

Note 2: Selecting a horse's Use reduces the number of horses displayed in horse dropdowns that are associated with how a horse is used. **For Example:** If a horse is used for lessons, selecting the Lessons checkbox will add the horse to the active list of horses displayed on the lesson screen. Selecting the Breeding checkbox will add the horse to the Stallion Reproduction dropdowns if the horse was identified as a stallion on the 'Horse Information – Identification'

screen. It will add the horse to the Mare Reproduction dropdowns if the horse was identified as a mare.

③ **Select** the horse's discipline from the Select Discipline dropdown.

Note 3: Selecting a horse's Discipline identifies the way a selected horse is used. A horse's Discipline assists the AAEP knowledgebase in recommending the appropriate preventative and health care protocols and how often they should be administered. For example: The recommended frequency for vaccinations is more frequent for show horses than pleasure horses. Sometimes equineGenie will automatically change a horse's discipline if the horse's circumstances change.

For Example: If a mare is open when its use and discipline are identified as **Use: Breeding and Discipline: Broodmare (open)** and then, the mare is bred and checked in foal, equineGenie will automatically change the mare's discipline to **Broodmare (pregnant)**. equineGenie will also change the recommended Rhinopneumonitis (EHV-1/EHV-4) vaccine with an semi-annual application frequency for an open broodmare to the Rhinopneumonitis (EHV-1, Abortion Rhino) vaccine with an application frequency of 5, 7 and 9 months gestation and the Rhinopneumonitis (EHV-1/EHV-4) vaccine at 300 days gestation. When the mare foals, equineGenie will automatically change the mare's discipline to **Broodmare (open)** and the vaccine back to the Rhinopneumonitis (EHV-1/EHV-4) with a semi-annual application frequency.

Note 4: The use and disciplines of a horse are selected from a check box dropdown list. A horse can be identified for more than one use or discipline. To close a check box list 'click' outside the dropdown.

Hint: If a horse's Use and/or Discipline changes it is easily removed and/or updated by selecting a horse and unchecking and/or checking Use and/or Discipline.

④ **Select Enter before leaving the Horse Use / Discipline screen to save the horse use and discipline selections.**

① **Selection** of the 'View *Selected Horse Uses / Disciplines*' enables the selected horse's use and discipline information to be viewed, exported and/or printed.

② **Selection** of the 'View All *Horse's Uses/Disciplines*' enables all horses' use and discipline information to be viewed, exported and/or printed.

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Horses Information – Removal

Path: Home: Horses: Information: Removal

There is a prerequisite setup required before a horse can be removed. A horse must be entered in equineGenie, (Horses: Information: Identification). (Horse Identification)

Think/Plan before you remove a horse! The Horse removal screen is used to remove a horse from the active horse dropdown lists in equineGenie. A horse is never removed from equineGenie. When it is removed it is made inactive and will only appear in the removal horse dropdown list. If historical records or information is required on a removed horse, the horse can be activated to obtain the records or information and then removed again.

① Select the horse to be removed from the *Select Horse* dropdown.

② Select the **Red, Removed?** button changing it from a **Red, 'No'** to a **Green, 'Yes'**.

Note 1: All horses ever entered in equineGenie remain in the *Select Horse* dropdown list. If a horse needs to be reactivated, select the horse from the dropdown list and select the **Green, Removed?** button changing it from a **Green, 'Yes' to a Red, 'No'**.

Caution: If the horse being removed is a customer horse and there are customer charges associated with the horse's removal, the horse charges need to be accounted for before the horse is removed.

Hint: A reactivated horse will be displayed in all horse dropdown lists based on its Use/Discipline selections. To see how a horse's use/discipline is selected, see the '*Horse Information – Use / Discipline*' training in this document. (**Use / Discipline**)

- ③ If a horse care provider assists in the removal of a horse, the care provider can be selected from the Administered/Removed By dropdown list.

Note 2: The horse care providers in the Administered/Removed By list are the horse care providers entered in the Horse Care Providers section. ([Path: Home: Horse: Horse Care Providers](#))

- ④ **The reason** for the removal can be entered in the Reason For Removal dropdown. Any reason entered is remembered by equineGenie and can be selected for another horse removed for the same reason without having to reenter the reason.
- ⑤ **Enter** the horse's removal date in the Removal Date box by selecting the date from the calendar icon or entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).
- ⑥ If there is a cost associated with the removal, **Enter** the removal cost in the Remove Cost box and select the **Red \$** to complete the business's cost financial transaction.
- ⑦ **Documentation associated with the removed horse** can be saved and recalled in equineGenie. The saved documentation can be in a PDF, word, text, image or video file format. Selecting the Locate button will allow the desired file to be located. Opening the file will add the selection to equineGenie. Selecting the View button allows the selection to be viewed. Selecting the Clear button will remove the selection from equineGenie.
- ⑧ If the horse being removed is a business asset horse, **selecting** the 'Go To Remove Horse Asset' button will enter the horse removal information and display the 'Financial Management – Fixed Assets Management – Management' screen. This enables equineGenie to stop the horse's depreciation, and calculate and report the horse's year to date depreciation.

Note 3: If the horse was entered on the fixed asset screen, the horse's name and removal date will be automatically displayed on the, 'Financial Management – Fixed Assets Management – Management' screen. ([Path: Home: Financials: Financial Management: Fixed Asset Management: Management](#))

Caution: If the horse being removed is not a business asset, do not select the, 'Go To Remove Horse Asset' button.

- ⑨ If the horse being removed is a customer horse, **selecting** the, 'Enter and Charge the Horse/Customer (Go To Horse Billing Log)' button will enter the horse removal information; the horse removal business cost transaction and display the Horse Billing Log. The horse's name and the removal date will be automatically displayed on the horse Billing Log.
- ⑩ **Select Enter** before leaving the 'Horse Information – Removal' screen if the, 'Enter and Charge the Horse/Customer (Go To Horse Billing Log)' button or the, 'Go To Remove Horse' button has not been selected.
- ① **Selection** of the 'View Removed Horses' enables all horses removed within a specified date range to be viewed, exported and/or printed.

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Horses – Arrivals/Departures/Return/Change Location

Path: Home: Horses: Information: Arrive/Depart/Return

A horse can be arrived, departed, returned and relocated. If a horse's arrival date is important to the business, entering a horse should start on this screen. If the arrival date is not important, a horse entry should start on the Horse Information – Identification screen. (Horse Identification) There is a prerequisite setup required before an already entered horse can be departed, returned or have its location changed. A horse must be entered in equineGenie, (Horses: Information: Identification. (Horse Identification)

Think/Plan before you arrive, depart, return, or change a horse's location! This training document is divided into sections on how to do each task: ([Horse Arrival](#)), ([Horse Relocation](#)), ([Horse Return](#)) and ([Horse Departure](#)).

Note: *It is suggested that horses already present in a business are entered on the Horse Information – Identification screen unless a horse's arrival date is important.*

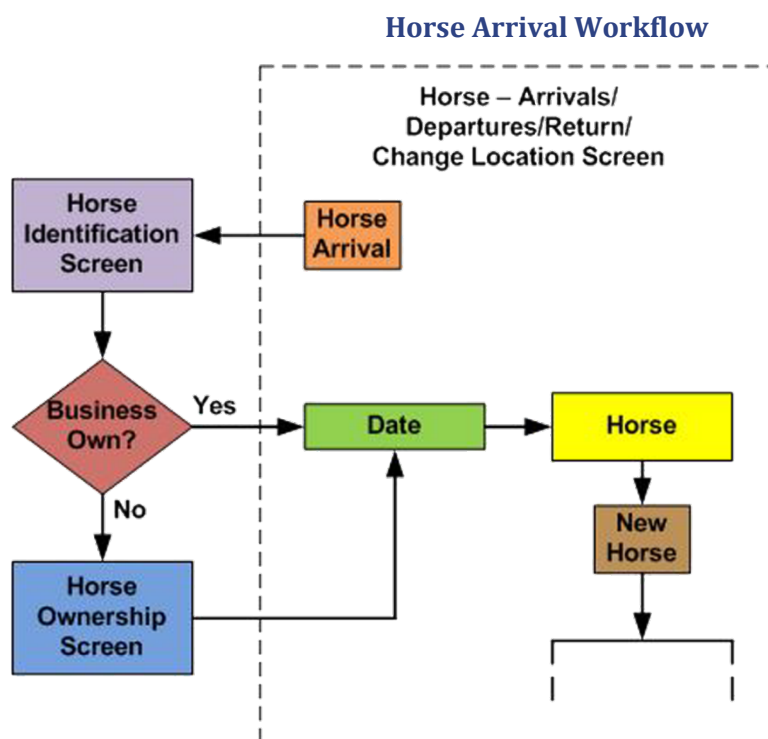
Horse Arrival – New Horse

① **Select** the Horse Arrival button if a horse is new to the business.

Note 1: Selecting the Horse Arrival button will display the 'Horse Information – Identification' screen. The arriving horse's information is entered on the 'Horse Information – Identification' screen. After the horse's information has been entered, and if the horse is owned by the business, the 'Return To Arrival / Departure' button is selected displaying the 'Horse –

Arrivals/Departures/Return/Change Location screen where the arriving horse's arrival information is completed.

If the horse is not owned by the business, after the horse's information has been entered the *'Go To Identify Horse Owner'* button is selected displaying the *'Horse Information – Ownership'* screen. The owner or owners of the horse are entered and their ownership percentages assigned. When the horse's ownership and their ownership percentages have been assigned selecting the *'Return To Arrival / Departure'* button is selected displaying the *'Horse – Arrivals/Departures/Return/Change Location'* screen where the arriving horse's arrival information is completed.



② **Select the Date** the horse arrived.

Note 2: The current date will be in the date dropdown and can be selected if it is the horse's arrival date. If the displayed date in the date dropdown is not the actual arrival date, a new date can be entered from the calendar icon or by entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

③ **Selecting the Date** the horse arrived will highlight the horse's name in the select Horse dropdown.

④ **If** the New Horse is arriving for reproduction, select the Reproduction Horse? button changing it from a **Red 'No'** to a **Green, 'Yes'**.

⑤ **Select** the Arriving Horse button.

⑥ **If** the horse's location was entered on the *'Horse Information – Identification'* screen it will be displayed in the *'Horse Location'* dropdown. If it was not entered it can be entered here. The location is entered in the *'Horse Location'* dropdown. If a stall number is assigned, the stall number is entered in the *'Stall #'* dropdown.

Note 3: If the horse's location was previously entered, it can be selected and does not need to be entered. The 'Stall #' will need to be entered.

- ⑦ **When** the arriving horse button is selected, the 'Reason For Arrival' dropdown will be activated. Enter the arrival reason. If a same arrival reason had been previously entered, the previously entered reason can be selected.

Note 4: Previously entered arrival reasons are remembered by equineGenie for future selection.

Horse Relocation

- ② **Enter the Date** the horse is relocated. A date can be entered from the calendar icon or by entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).
- ③ **Select** the horse being relocated from the Select Horse dropdown.
- ⑤ **Select** the 'Relocate Horse' button.
- ⑥ **Enter or Select** the horse's new location in the Horse Location dropdown. If a Stall is involved with the new location, enter the Stall #. See **Note 3**, in the Horse Arrival section.
- ⑦ **When** the 'Relocate Horse' button is selected, the 'Reason For Relocation' dropdown will be activated. Enter the relocation reason. If a same relocation reason has been previously entered, the previously entered reason can be selected.

Note 5: Previously entered relocation reasons are remembered by equineGenie for future selection.

Horse Return

- ② **Enter the Date** the horse returns.
- ③ **Select** the returning horse from the Select Horse dropdown.
- ⑤ **Select** the 'Return Horse' button.
- ⑥ **Enter or Select** the returning horse's location in the Horse Location dropdown. If a Stall is involved with the new location, enter the Stall #. See **Note 3**, in the Horse Arrival section.
- ⑦ **When** the 'Return Horse' button is selected, the 'Reason For Return' dropdown will be activated. Enter the return reason. If a same return reason has been previously entered, the previously reason can be selected.

Note 6: Previously entered return reasons are remembered by equineGenie for future selection.

Note 7: When a horse is returned all its records prior to being departed are reactivated and do not have to be reentered. However, if anything has changed the associated record will have to be updated.

Horse Departure

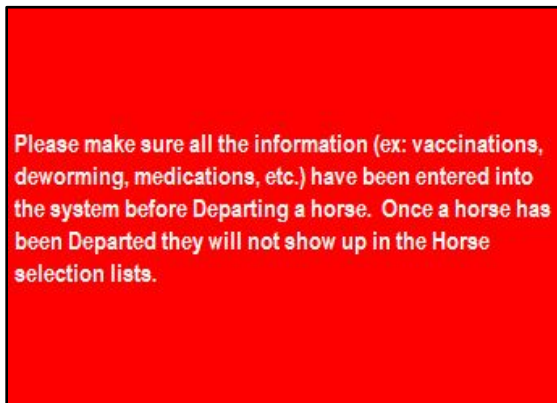
- ② **Select the Date** the horse departs.

③ **Select** the departing horse from the Select Horse dropdown.

⑤ **Select** the 'Depart Horse' button.

Note 8: When the 'Depart Horse' button is selected a warning message will be displayed reminding the business to make sure all the horse's records are up to date.

Horse Departing Warning



⑦ **When** the 'Depart Horse' button is selected, the 'Reason For Departure' dropdown will be activated. Enter the departure reason. If a same departure reason has been previously entered, the previously reason can be selected.

Note 9: Previously entered relocation reasons are remembered by equineGenie for future selection.

Caution: When a horse is departed it is still present in equineGenie, but deactivated from any horse dropdowns. Therefore, any horse charges must have been entered in the horse's billing log before the horse is departed. (*Path: Home: Customer Clients: Service/Product Provided: Horse Billing Log*)

⑧ Pictures of an arriving, returning or departing horse can be added to equineGenie. A picture can be identified with an identifying name and if it is an Arrival or Departure picture.

To add a horse's picture select the Locate button to locate the horse's picture file. Opening the horse's picture file will automatically add it to equineGenie. Selecting the View button allows you to view the horse's picture in equineGenie. Selecting the Clear button will remove the horse's picture from equineGenie.

To add multiple pictures select the orange '**Another Picture**'. Selecting '**Another Picture**' will clear the previous picture's information and prepare equineGenie to accept another picture. Repeat the picture process until all the arrival or departure pictures have been added.

Note 10: A horse's Arrival or Departure picture needs to have a 3:2 aspect ratio. This means the horse's picture selected for equineGenie needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2. This is a requirement of Crystal Reports, the report writer used by equineGenie. If a picture does not have the required 3:2 aspect ratio it will appear distorted on reports using a horse's picture.

- ⑨ If you need to remove a **Arrive / Departure entry**, it can be removed by displaying the horse and its arrival or departure entry and then, selecting the **Remove Selected Arrive / Depart Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the arrival or departure.



- ⑩ Enter any comments or notes associated with the selected horse's arrive / depart / return / location entries.
- ① Select the *Return To Horse Purchases* button to return to the '*Horse Information – Purchase*' screen.

Note 11: Selecting the *Return To Horse Purchases* button will display the '*Horse Information – Purchase*' screen. The purchased horse's arrival information is entered on the '*Horse – Arrivals/Departures/Return/Change Location*' screen.

- ② Select **Enter before leaving the Horse – Arrivals/Departures/Return/Change Location** screen.
- ③ Selection of the '*Horse Status / Location*' enables the selected horse's status and location to be viewed, exported and/or printed.
- ④ Selection of the '*All Horse Location*' enables the location of all the horses to be viewed, exported and/or printed.

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Horses –Location / Location Capacity

Path: Home: Horses: Information: Location/Capacity

There is no prerequisite setup required.

Think/Plan before identifying the locations and their capacity where the business's horses will be or are located!

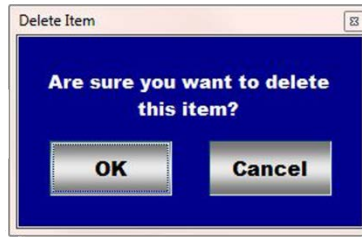
① **An Existing Location**, can be select from the 'Enter Or Select A Location' dropdown. **To add a Location**, select [New Item] from the 'Enter Or Select A Location' dropdown and click in the dropdown box and enter the location's name.

② **If a Location** is selected from the 'Enter Or Select A Location' dropdown ①, its description will be displayed in the Location Description dropdown. If a new location was added, **Enter** the location's description in the Location Description dropdown.

③ **Enter** the location's horse capacity in the Horse Capacity box.

Note 1: equineGenie reports the number of horse's in each location that has assigned horses. The report identifies a location's horse availability and its remaining capacity available.

④ **If you need to remove a Location**, it can be removed by displaying the location and then, selecting the **Remove Selected Location Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the location.



Caution: If a location is removed that has horses assigned. The horses in the removed location will have to be reassigned to a different location.

Suggestion: Identify all the horses in the location that is being removed before the location is removed. That way you will have the identity of any horses that need to be reassigned.

⑤ **Select Enter before leaving the Horse – Location / Location Capacity screen.**

① **Selection** of the '*Horse Location w/Capacity Report*' enables the locations and their horse capacity to be viewed, exported and/or printed.

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