The System (Part 1)
System Requirements
The Program

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Table of Content

Mouse Over and Click On a content subject to go to that subject

System Requirements

The equineGenie system is an enterprise management system. It was developed exclusively to help manage any type of horse business. It uses intuitive 'point and click' screens, 'dropdown menus' and 'selectable selections from knowledgebase lists'. It is designed for minimal data entry. It is user customizable. The user can tailor equineGenie to best help them measure and manage their horse business. equineGenie continually analyzes the user's data and generates intelligent reports, some of which make management suggestions. equineGenie further uses embedded artificial intelligence and expert knowledge to optimize a business's operations and financials.

 You do not need to be an accountant, business guru, or a computer whiz to use equineGenie! equineGenie will assist you, teach you and support you!

System Font

The text displayed in equineGenie dropdowns and text boxes require the **Arial Narrow** font. The **Arial Narrow** font must be installed in the font section of your computer's windows operating system control panel.

If the text displayed on equineGenie screens is too large, or doesn't fit in the menu dropdowns, you probably do not have the **Ariel Narrow** font on your computer or your display text size is set too large.

Note: The **Ariel Narrow** font is shipped with your equineGenie system software, or it can be obtained from the equineGenie support team by emailing the Genie team: *info@genieatwork.com*.

Display Text Size

If the **Ariel Narrow** font is installed and the equineGenie screen text is still too large, the system **Display Text Size** is set at too large a percentage. It should be set to **100%** or the smallest setting depending on the version of the windows operating system you are using. The system Display Text Size is set in the display section of your computer's windows operating system control panel.

 If the text displayed on the equineGenie screens is too large and you have the **Ariel Narrow** fonts installed, you probably do not have your display text size set correctly.

Note: It should be set to **100%,** or the smallest selectable setting. A Genie Team is always available to help you get your equineGenie system setup correctly and your windows operating system set for optimal performance when using your equineGenie system.

Display Size

The equineGenie screen display is movable on your computer's display. It is movable so that you can have other documents open and available when you are entering information into your equineGenie system. Those documents might be a vet bill, purchase receipts, etc. The size and resolution of the equineGenie screen is your

choice. If you decrease your computer's display resolution, equineGenie's screen display size increases. If you increase your computer's display resolution, equineGenie's displayed size decreases.

Note: If the equineGenie screen is too small or too large the screen size can be adjusted by changing your display resolution.

Note: Most windows operating system will allow you to change your screen resolution by right 'clicking' your mouse on your windows home screen. This will display a box that contains a screen resolution selection. This enables you to change your system display resolution without having to display your system's control panel.
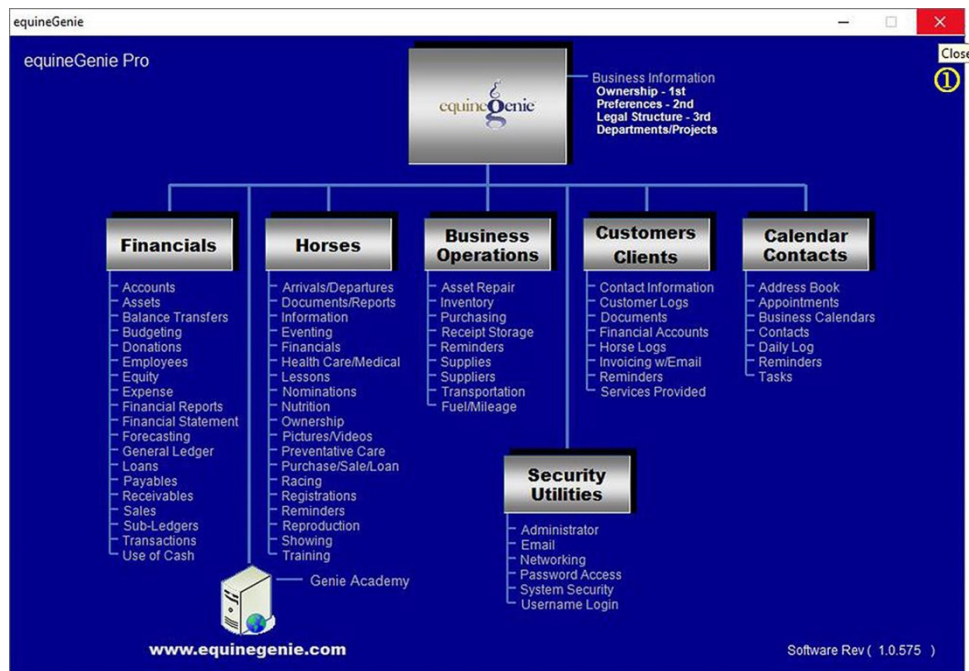
The equineGenie Program

The equineGenie program is designed for ease of use. This section explains the selections and symbols used in equineGenie, and equineGenie's response resulting from a selection.

Program Exit

The equinegenie program always starts on its home screen. You should always exit equineGenie from its home screen. To exit equineGenie, you select the **Red X** in the upper right corner of the home screen.


① Always exit equineGenie by displaying the home screen and selecting the **Red X**. This will prevent losing any information you previously entered on any equineGenie screen.

Return to the Table of Content

Program Symbols

The equinegenie program makes it easy to return to the last screen in which you entered information, or to return to the Home screen to exit equineGenie. Both the Home and Return symbols are located in the lower left corner on any equineGenie screen except the Home screen.
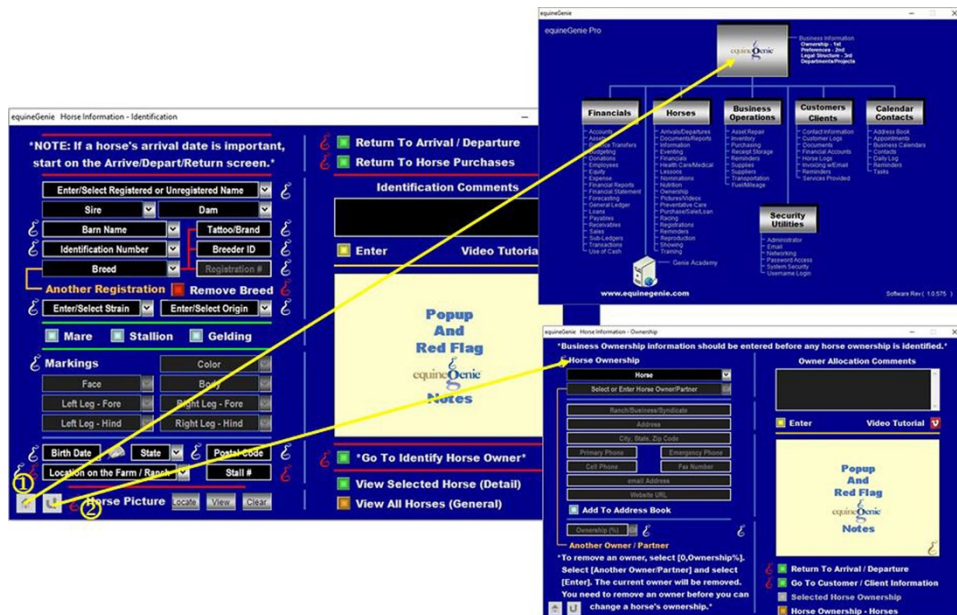
Home Symbol
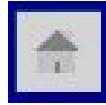
The Home symbol is represented by a house.

Return Symbol

The Return symbol is represented by a U-turn arrow.

equineGenie Home and U-Turn Example

① Selection of the house symbol in a screen's lower left corner will display equineGenie's Home screen.

② Selection of the U-turn symbol in the lower left corner will display the previous equineGenie screen.

Return to the Table of Content

Genie Notes

The equinegenie program provides online assistance using Genie Notes. **White Genie Notes** provide general information about an adjacent activity or entry. **Red Genie Notes** provide an important, caution or warning note about an adjacent activity or entry.

White / Red Genie Notes

① **Selection of a White Genie Note** displays information about the item that is adjacent to it.

② **Selection of a Red Genie Note** displays an importance, caution or warning about the item that is adjacent to it.
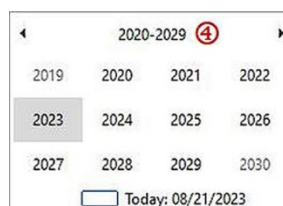
Return to the Table of Content

Dates

A date can be entered in equineGenie by either entering the date in a date text box or dropdown or by selecting a date from the calendar icon beside the date box or dropdown. Entering a date in a date text box requires the date to be entered in a day/month/year or a month/day/year format depending on the date format you have set in your computer's window's operating system date format, e.g., 4/6/2012 or 6/4/2012. Entering a date by selecting it from a popup calendar requires you to click on the Calendar Icon and then select the desired date.
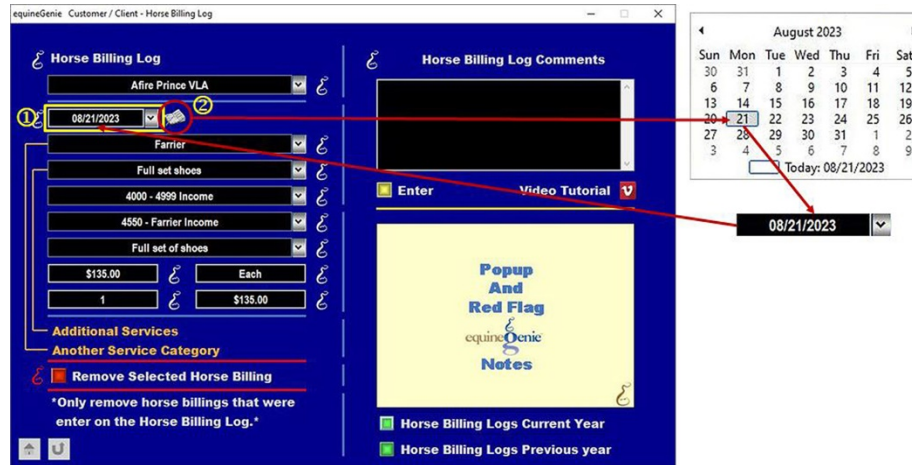
① **A date can be entered** or a previous Date can be selected from the date dropdown.

② **Selecting the Calendar Icon** will display a calendar with the current year, month and day.

③ **A different month** can be displayed by 'clicking' on the calendar's month which will display the twelve months of the displayed year.
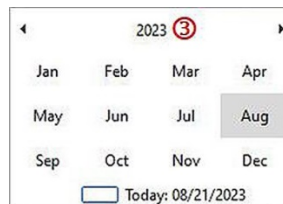
④ **A different year** can be displayed by 'clicking' on the calendar's year which will display the current decade in which the current year is included.

Return to the Table of Content

Address Book

On many screens, throughout equineGenie, you add address information for customers, vendors, employees, horse care providers, etc. This address information can be added to the system Address Book by selecting the *Add To Address Book* button. Selecting the button will add the respective contact and the contact's information to your equineGenie Address Book.

① **When the 'Add To Address Book' button is selected** the address information on the initiating screen will be added to the Address Book. In some cases the Address Book can accept additional address information than is provided by the initiating screen. To add additional information to a contact's address, go to the address book screen to add the additional information.

② **A picture associated with an address can be added** to the selected address contact. Once added it can be viewed by selecting the *View* button.
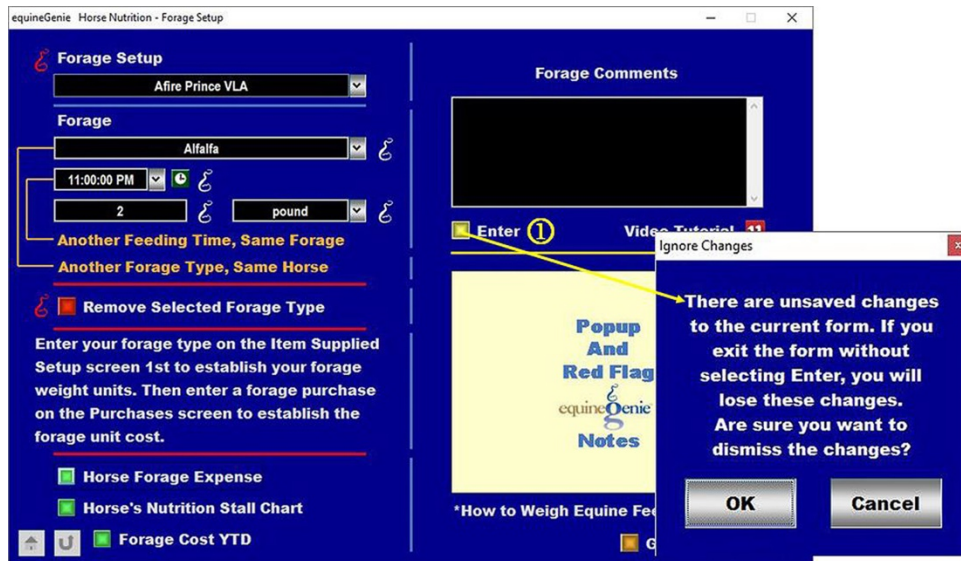
Return to the Table of Content

Program Warnings

When there is a risk of losing information entered on the screen in which you are working, but not saved, or deleting an image or a reminder, equineGenie will issue a warning.

Exiting A Screen

A system warning is displayed if you attempt to **Exit A Screen** without saving your information in your equinegenie database.

① **If the unsaved changes warning** appears you would select Cancel and select the initiating screens **Enter** button. **Selecting OK will exit the screen without saving your information.**

Return to the Table of Content

Delete An Image

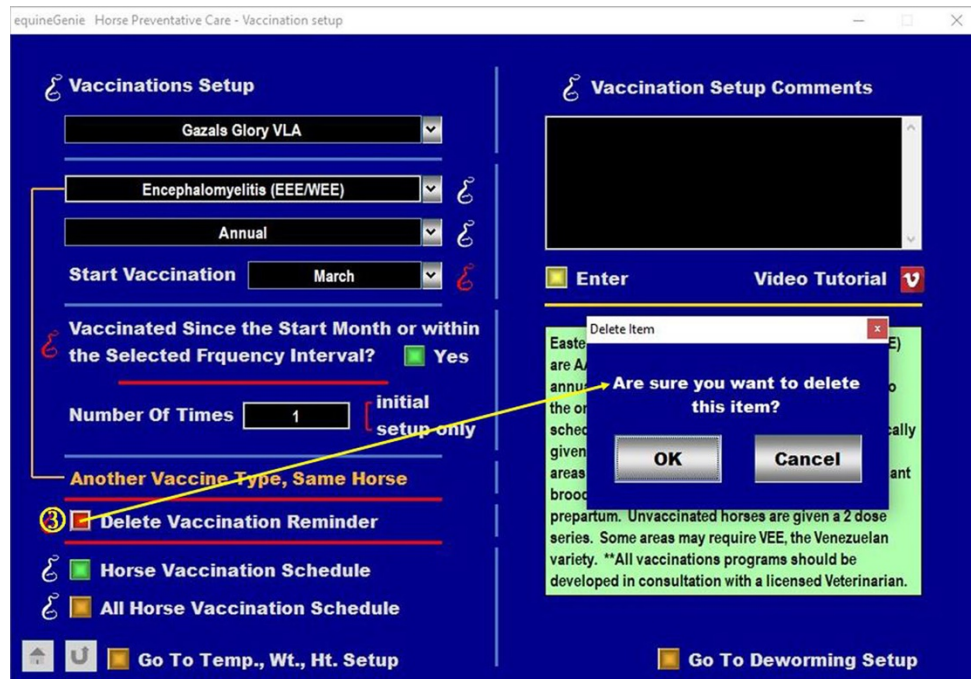A system warning is displayed if you elect to delete an image.

② **If you select delete an image**, equineGenie will display a warning to make sure you want to delete the image. Selecting cancel will not delete the image. **Selecting OK will delete the image**.

Return to the Table of Content

Deleting An Item

A system warning is displayed if you elect to delete an item like a vaccination reminder.

③ **If you select delete an item**, equineGenie will display a warning to make sure you want to delete the item. **Selecting Cancel will not delete the item**. **Selecting OK will delete the item**.

Return to the Table of Content

Remove An Entry

On several screen you can remove a complete entry. You select the '**RED**' button beside an entry that you want to remove. A system warning is displayed to make sure you want to remove the selected entry.
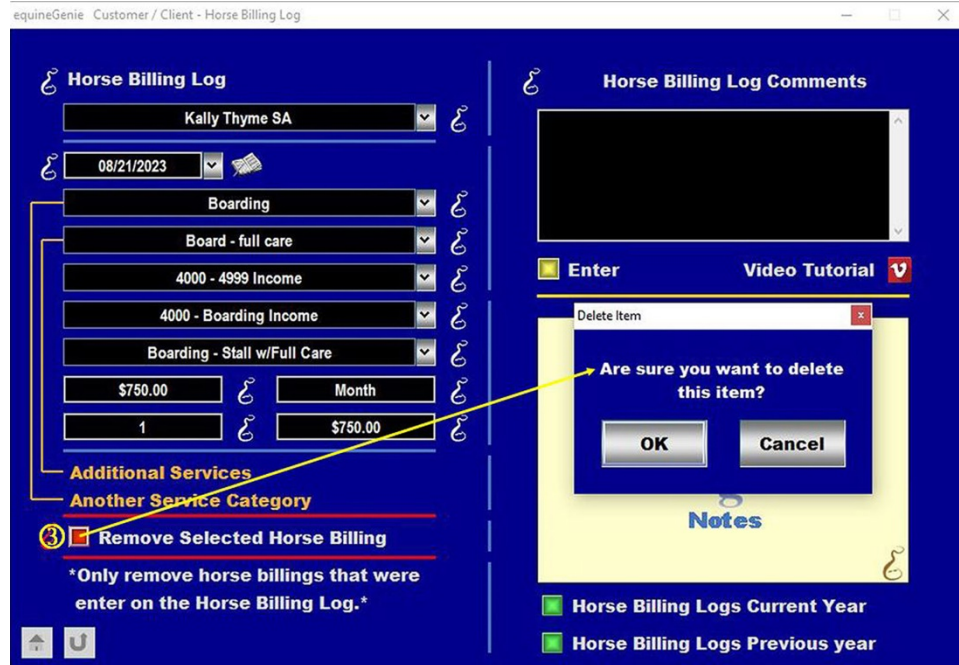
④ **If you select remove an entry** equineGenie will display a warning to make sure you want to delete the entry displayed. Selecting Cancel will not delete the entry. Selecting OK will delete the entry.

Note: Always display and read the '**RED**' Genie Note beside a Remove button. The '**RED**' Genie Note will explain what conditions must be met to remove an item, an image or an entry. Removing an item, picture, or entry will completely remove it from equineGenie.

Setup Sequence

The recommended setup sequence is;

1. **Business Information** – **Path: Home Screen**

    a. Owner(s) Information,

    b. Owner Preferences – Note: Measurement system used currency symbol and Asset Capitalization Value.

    c. Business Legal Structure

    d. Business Departments (optional)

2. **Financial Business Setup** – **Path: Financials: Financial Business Setup**

    a. Chart of Accounts and Subaccounts

    b. Vendor Accounts (Vendors that do not supply purchased items; e.g., insurance agents, Utility Companies, etc.)

    c. Customer Accounts – Note: You cannot invoice without a customer account number and payment terms identified.

    d. Checking Account(s)

    e. Credit Card(s)

3. **Horses** – **Path: Horses: Information**

    a. Identification

    b. Ownership – Note: A customer's horse ownership must be identified before a customer can be invoiced for horse related charges; e.g., Board, Farrier, Vaccinations, etc.)

    c. Use/Discipline

    d. Nutrition

    e. Care Providers

    f. Preventative Care

4. **Business Operations** – **Path: Business Operations: Supplies Purchases**

    a. Items Supplied Setup (Items Purchased)

    b. Item's Vendor Supplier Financial Information (**Green** **button** – *Go To Supplier Financial Account*)

5. **Customer – Clients** – **Path: Customer Clients: Customer Client**

    a. Customer/Client Contact Information – **Note:** If the customer financial information has not been identified it needs to be now.

    b. Services/Products Provided – **Note:** The services and products you provide your customers.

    c. Billing Management

6. **Optional**

    a. Calendar Contacts

        i. Addresses

   b. Security

     i. Identify a Security Administrator

     ii. Usernames

     iii. Passwords

Note: Your equineGenie purchase includes free setup help and product training – take advantage of it!

Return to the Table of Content