# The System (Part 2)
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# The System (Part 2)

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

# Entering Information

There are four types of dropdowns in the equineGenie program. You need to be aware of the different types so that an entry or selection is correctly executed.

## Line Item Dropdown

The Line Item dropdown displays information in a line format. More than one line can be displayed, but only one line can be selected at a time. The line selection is displayed in the dropdown box after selection.
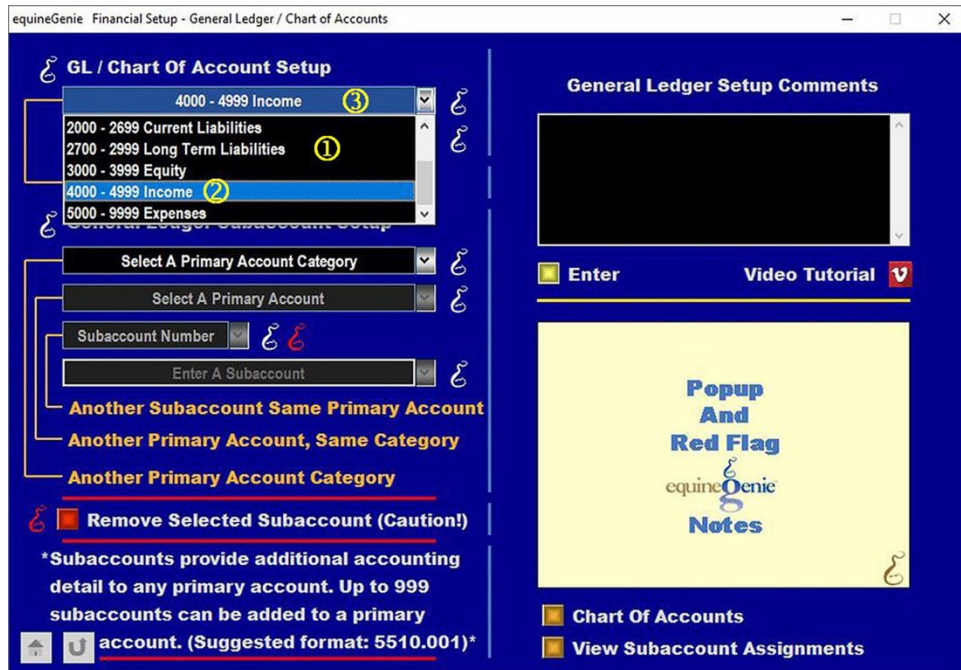


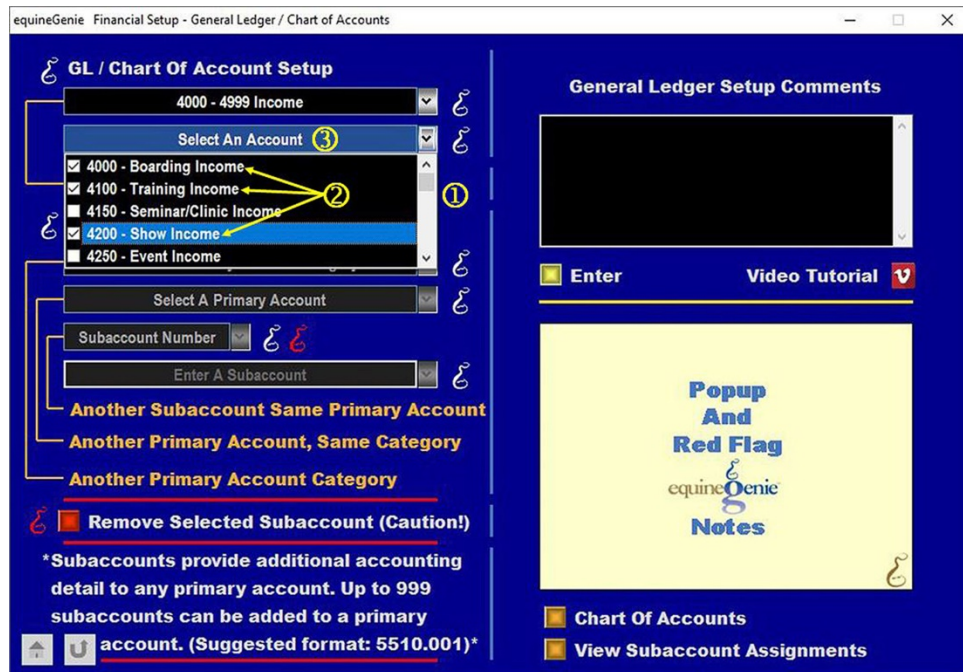① **Selecting a Line Item Dropdown** will display the line items available for selection.

**Note:** A maximum of five items are displayed in a dropdown. If more than five items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining items.

② **Clicking on a Line Item will highlight** it in the dropdown list and display the selected line item in the dropdown box.

③ **The selected Line Item will be displayed** the Line Item Dropdown box after the dropdown closes.

# Check Box Dropdown

The Check Box dropdown displays information in a check box format. More than one check box can be displayed and one or multiple check boxes can be selected at a time. Since multiple check boxes can be selected, no selections are displayed in the dropdown box after selections are made.



① **Selecting a Check Box Dropdown** will display the check box items available for selection.

**Note:** A maximum of five check boxes are displayed in a dropdown. If more than five check boxes are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining check boxes.

② **Clicking on a Check Box will add a check mark to the box** indicating the check box has been selected. Multiple check boxes can be checked.

③ **No selected check boxes will be displayed the Check Box dropdown** box after the dropdown closes.

**Note:** Because multiple check boxes can be selected, no selections are displayed.

# [New Entry] Dropdown

The **[New Entry] Dropdown** enables you to add an item to a dropdown list, e.g., a new item, a new horse, a new vehicle, etc. To add a new item to a [**New Entry**] dropdown list you select [**New Entry**] from the dropdown list and then click in the [**New Entry**] dropdown box. This allows you to enter an new entry to the dropdown list. When a new entry is entered it is auto learned by equineGenie and added to the dropdown list for future display and selection.



① **Selecting a [New Entry] Dropdown** will display the [**New Entry**] line item and any other available selections.

**Note:** A maximum of five line items are displayed in a dropdown. If more than five line items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining line items.

② **Clicking on the [New Entry] line item** and then clicking in the [**New Entry**] dropdown box will enable a new associated line item to be entered.

③ **A new entry is auto learned by equineGenie** and when saved, will be added to the dropdown list and displayed in the dropdown for future selection.

## Auto Learn Dropdown

The **Auto Learn Dropdown** enables you to add a new line item by clicking in the dropdown box and entering the new line item. Line items previously entered in an **Auto Learn Dropdown** are displayed when the **Auto Learn Dropdown** is selected. equineGenie auto-learns the new line item entry and makes it available to the dropdown list for future selection.



① **Selecting an Auto Learn Dropdown** will display the line items previously entered.

**Note:** A maximum of five line items are displayed in a dropdown. If more than five line items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining line items.

② **A new entry can be added** and is auto learned by equineGenie. When an auto learned entry is added it will be displayed in the **Auto Learn Dropdown** for future selection.

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## Text Box

A **Text Box** enables you to enter information that is unique to the entry you adding to equineGenie. To add an entry in a **Text Box** you just click in the **Text Box** and enter the information. equineGenie adds the text box entry to the associated database tables when the screen is saved. Recalling a saved screen will display the screen's information which includes any **Text Box** entries. **Text Boxes** are easily recognized because they do not have a dropdown scroll bar.



① **Selecting a specific screen will display** the screen's data entry formats. Displaying a specific screen will display the screen's information including any **Text Box entries**. **Text Boxes** are easily recognized because they do not have a dropdown scroll bar.

**Note:** To change a **Text Box** entry the previous screen entry must be displayed. You can then mouse over a previous **Text Box** entry and make any necessary changes. In this example if you needed to change the customer's address you would display the previous customer account setup, mouse over the address that needs changing and make the necessary changes. When the screen is resaved any customer address changes will be updated.

Selecting the **Add To Address** button after any changes are made will update the customer's address information in your equineGenie address book.

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## Enter Information

equineGenie enables the user to enter information without having to reselect or reenter any previous information. For example: on the example screen below, by selecting *Another Subaccount Same Primary Account* the previous information is entered in the system and the Primary *Account Category and Primary Account* <u>do not</u> have to be reelected to enter additional subaccount information for the same **Account Category and Account**.



① **Selecting Another Subaccount Same Primary Account** will clear the subaccount number and subaccount name previously entered.

② **A new subaccount number and subaccount name can be entered** without having to identify the Expense Category and Expense Account again.

**Note:** This capability is on many equineGenie screens, but may have different wording. However, the capability is always be identified by the '**ORANGE**' color.

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# Database Entries

equineGenie's database is a relational hierarchal database structure. Get **organized and think** about what you want to accomplish before you enter a screen's information and select the **Enter** button. Selection of the **Enter** button enters the screen's information into your equineGenie database and creates a record in an associated database table and in some entries, several database tables.

You can change the information in a database record by recalling a entire screen and changing its information. However, in a rare case where the information is critical financial information a database record can only be removed by a GenieCo representative. This is to prevent **'creative' accounting** without the business owner's knowledge.

There are several screens in equineGenie where an entire screens information can be removed as explained in the **'Remove An Entry'** section of this document. However, removing a financial or customer database record is not encouraged.

# Reports

equineGenie has over 600 reports available that can be **exported as a PDF, Excel Spreadsheet or a Word Document and printed**. Many reports are intelligent reports and contain suggestions on how to improve your business. A eport may have Multiple Pages. When you display a report it can be magnified. Existing reports cannot be changed, but a new report can be added free of charge if the report's information is captured in equineGenie. equineGenie owns the completed report and can include it in future equineGenie system releases.
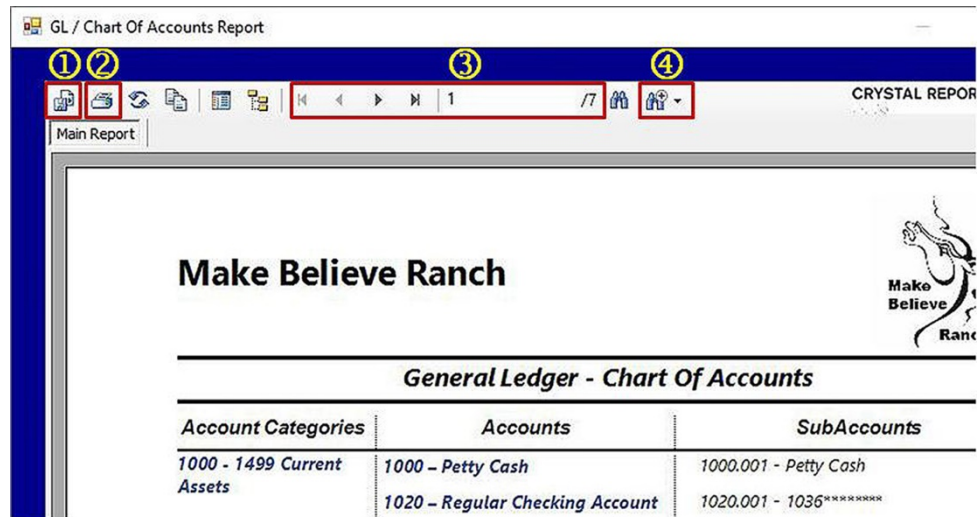


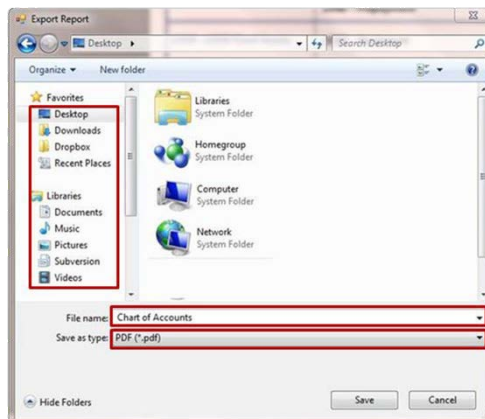①  **A Report can be exported as a PDF (*pdf), a Microsoft excel (*xls) spreadsheet or a Microsoft word (*.doc) document**.  When a Report is exported it is given a name and its destination is identified.



**Note:** **Do not export a report in the Crystal Reports (*rpt) format**. If you want to reconfigure or change a report's colors, export it in the (*doc) format and open it as a word document and make the desired changes, or open it in your favorite design software.

②  **A report can be printed** on your system printer by selecting the printer symbol.

③ **Many reports have multiple pages**. You can view different pages by using the multiple page scrolls.

④ **A report can be magnified** by selecting the magnification dropdown and identifying the desired magnification level.

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# 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!**


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