



Horse Information

Purchase

Sale

Sale Loan

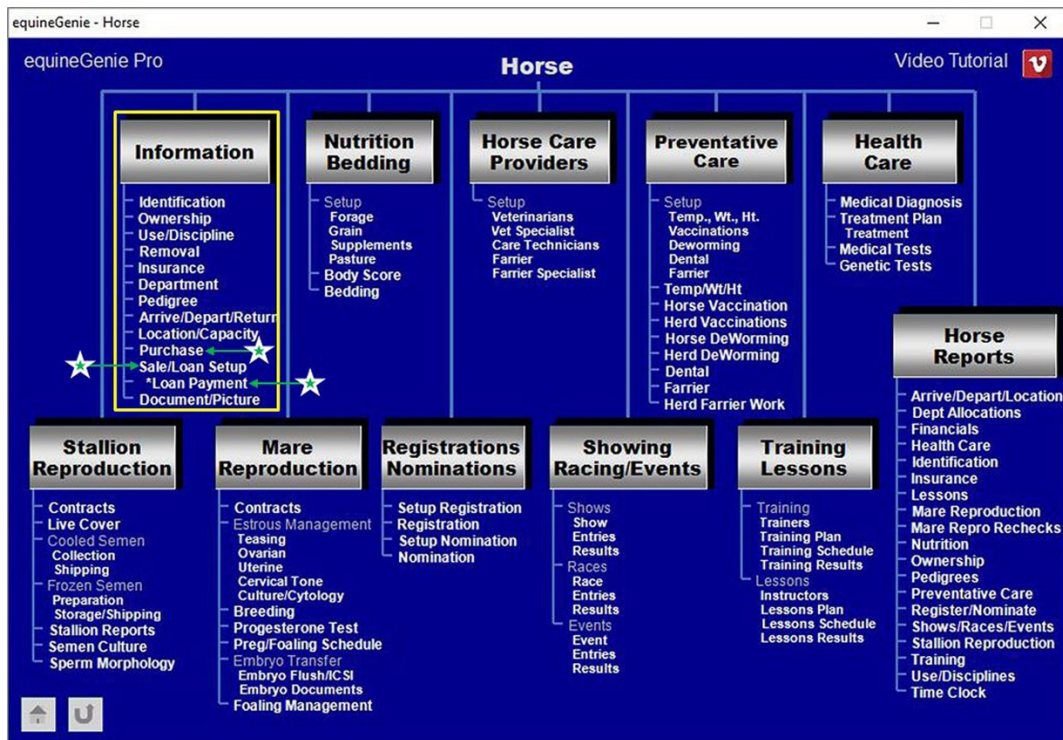
Sale Loan payment

Horse Information – (Part 2)

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Horses Information – Purchase

Path: Home: Horses: Information: Purchase

There are no prerequisite setups.

Think/Plan before you enter the horses you purchase in equineGenie! If a purchased 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). If a purchased horse's arrival date is NOT important to the business, start entering the horse on the Identification screen. (Path – Home: Horse Information: Identification)

Important: If a horse's arrival date is important, start entering the horse on the *Horse Arrive/Depart/Return* screen by selecting the *Go To Horse Arrival* button. If a horse's arrival date is NOT important, start entering the horse on the *Horse Identification* screen by selecting the *Go To Horse Identification (ID)* button.

- ① Select the *GO TO Horse Arrival* button if the purchased horse's arrival date is important. See **important** notice above.
Select the *GO TO Horse Identification (ID)* button if the purchased horse's arrival date is NOT important. See **important** notice above.
- ② The **Purchased horse's name** will be automatically displayed when returning from the *Arrive/Depart/Return* screen or the *Horse Identification* screen.
- ③ Enter the horse's purchase date in the *Purchase Date* dropdown 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).

Enter the seller's name in the *Seller* box.

Enter the seller's address in the *Address* box.

Enter the seller's city, state and zip code in the *City, State, Zip Code* box.

Enter the seller's telephone number in the *Telephone* box.

Enter the seller's email address in the *Email* box.

- ④ The seller's address information can be added to equineGenie's address book by selecting the 'Add To Address Book' button.

Note 1: The seller's address information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book.*

- ⑤ Enter the horse's purchase price in the *Purchase Price* box.

If the horse is being purchased with a loan that requires a down payment, enter the down payment in the *Down Payment* box.

Note 2: If a down payment is entered, selection of the \$ will display loan balance in the *Purchase Balance* box and display the *Payment Method* popup to initiate recording the financial transaction associated with the purchase down payment. Completing a payment transaction is explained in the *Deposits and Payments training documents.*

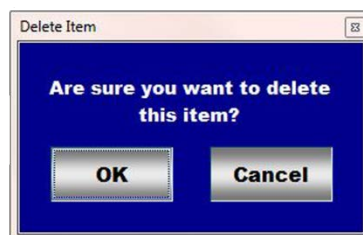
If the horse is being purchased with a loan that has no down payment, enter '0' in the *Down Payment* box and 'click' in the *Purchase Balance* box. The loan balance without a down payment will be displayed in the *Purchase Balance* box.

If the horse is being purchased without a loan, enter '\$0' in the *Down Payment* box and 'click' in the *Purchase Balance* box. The purchase price will be displayed in the *Purchase Balance* box.

Note 3: If the purchase price without a loan is displayed in the *Purchase Balance* box, selection of the \$ will display the *Payment Method* popup to initiate recording the financial transaction associated with the purchase price. Completing a payment transaction is explained in the *Deposits and Payments training documents.*

Note 4: If the horse is purchased with a loan, selection of the *Go To Loan Setup* button⑧ will display the *Financial Setup – Loans* screen to complete the horse purchase loan setup.

- ⑥ If you need to remove a purchase, it can be removed by displaying the entire purchase's information and selecting the Red 'Remove Selected Purchase' button. When the button is selected a *Delete Item* popup will be displayed to make sure you want to delete the purchase.



After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button **1**.

- 7** **Enter** any comments or notes associated with the horse purchase information.
- 8** **If the horse is purchased with a loan**, selection of the *Go To Loan Setup* button will display the *Financial Setup – Loans* screen to complete the horse purchase loan setup. The name of the horse purchased, the purchase date and the loan amount are automatically transferred to the *Financial Setup – Loans* screen.
- 9** **If the purchased horse is a non-exchanged fixed asset**, select the *Go To Fixed Asset (nonexchange)* button. Selection of the button will display the *Financial Setup – Fixed Asset* screen so the horse purchase can be capitalized and depreciated. The horse's name, the purchased price and the purchase date (In Service Date) are automatically displayed on the fixed asset screen.
- 10** **If the purchased horse is an exchanged asset**, select the *Go To Asset Management (exchange)* button. Selection of the button will display the *Financial Management – Fixed Assets* screen so the horse purchase asset exchange can be entered and managed. The horse purchase date is automatically displayed on the fixed assets management screen.
- 1** **Select enter** before leaving the *Horse Information – Purchase* screen.
- 2** **Selection** of the 'View Purchased Horse' button will enable the selected horse's purchase information to be viewed, exported and/or printed.
- 3** **Selection** of the 'Available Purchased Horses' button will enable all available horses purchased to be viewed, exported and/or printed.
- 4** **Selection** of the 'Purchased Horses Current Year' button will enable all horses purchased in the current year to be viewed, exported and/or printed.
- 5** **Selection** of the 'Purchased Horses' button will enable all horses purchased to be viewed, exported and/or printed.

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Horses Information – Sale/Loan/Payment Setup

Path: Home: Horses: Information: Sale/Loan Setup

There is a prerequisites required before a horse can be sold. A horse must be entered in equineGenie, (Path - Horses: Information: Identification).

Note: If there will be buyer charges associated with a horse sale, the buyer needs to be entered in equineGenie as a customer and setup to be billed and invoiced, (Path – Customers Clients: Customer Client: Contact Information). Reference the Customer Setup and Customer Billing training documents in the Genie Academy.

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

Note 1: The horse must have been previously entered in equineGenie on the *Horse Information – Identification* screen to be available for selection in the *Select Horse* dropdown.

Important: If there will be horse buyer charges that need to be billed and invoice to the horse buyer, enter the horse buyer in equineGenie as a customer.

② Enter the horse's sale date in the *Sale Date* dropdown 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).

Enter the buyer's name in the *Buyer* box.

Enter the buyer's address in the *Address* box.

Enter the buyer's city, state and zip code in the *City, State, Zip Code* box.

Enter the buyer's telephone number in the *Telephone* box.

Enter the buyer's email address in the *Email* box.

- ③ **The buyer's address information** can be added to equineGenie's address book by selecting the 'Add To Address Book' button.

Note 2: The buyer's address information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If additional information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book.*

- ④ **Enter the horse's sale price** in the *Sale Price* box.

If the horse is being sold with a loan that requires a deposit or down payment, 'clicking' in the *Payment or Deposit* box will enter the sale price. The deposit or down payment can be changed by mousing over the sale price and entering the correct amount.

Note 2: If a deposit or down payment is entered, selection of the \$ will display the *Deposit Method* popup to initiate recording the financial transaction associated with the sale deposit or down payment. Completing a payment transaction is explained in the *Deposits and Payments training documents.*

If the horse is being sold with a loan that has a deposit or down payment, the loan balance will be displayed in the *Balance Due* box.

If the horse is being sold without a loan, enter the sale price in the *Sale Price* box and 'click' in the *Deposit or Down Payment* box. The sale price will be displayed in the *Deposit or Down Payment* box and '\$0' will be displayed in the *Balance Due* box.

Note 3: If the sale price without a loan is displayed in the *Deposit or Down Payment* box, selection of the \$ will display the *Deposit Method* popup to initiate recording the financial transaction associated with the sale price. Completing a payment transaction is explained in the *Deposits and Payments training documents.*

Note 4: If the horse is sold with a loan, selection of the *Go To Loan Setup/Payment* button ❶ will display the *Horse Information – Sale/Loan/Payment* (page 2) screen to complete the horse sale loan setup and calculate the loan payment. The loan balance and the sale date will be automatically transferred to the *Horse Information – Sale/Loan/Payment* (page 2) screen and displayed.

- ⑤ **Enter** any comments or notes associated with the horse sale information.

- ⑥ If the horse being sold generates any charges to the buyer resulting from the sale, **selecting** the 'Enter and Charge Customer (Go To Customer Billing Log)' button will enter the sale information; and display the *Customer Billing Log*. The buyer's name, horse sold and the sale date will be automatically displayed on the *Customer Billing Log*.

Note 5: The buyer must have been previously entered into equineGenie as a customer who will be billed and invoiced.

- ⑦ **If the horse being sold is not an asset in the business,** select the *Go To Remove Non Asset Sale Horse?* button. Selection of the button will display the *Horse Information – Removal* screen where the sale horse can be removed from the associated active horse dropdowns. The sale horse's name and sale date are automatically transferred to the *Horse Information – Removal* screen.

- ⑧ If the horse being sold is an asset in the business, select the *Go To Manage Asset Sale Horse?* button. Selection of the button will display the *Financial Management – Fixed Asset* screen where the sale horse can be removed from the business fixed asset list and the fixed asset managed. The sale horse's name and sale date are automatically transferred to the *Financial Management – Fixed Asset* screen.

Note 6: The sale horse must have been previously entered into equineGenie as a fixed asset for the sale horse name to be transferred to the *Financial Management – Fixed Asset* screen.

- ⑨ Select enter before leaving the *Horse Information – Sale/Loan/Payment (page 1)* screen.
- ① If the horse is sold with a loan with periodic payment, selection of the 'Go To Loan Setup / Payment' button will display the *Horse Information – Sale/Loan/Payment (page 2)* screen where the loan payments can be calculated.
- ② Selection of the 'Non Asset Horse Sale (Date Specified)' button will enable all non-asset horse sales within a specified date range to be viewed, exported and/or printed.
- ③ Selection of the 'All Horse Sales (Date Specified)' button will enable all horses sales within a specified date range to be viewed, exported and/or printed.

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Horse Sale – Loan Payment Setup

equineGenie Horse Information - Sale/Loan/Payment

Horse Sold / Loan Setup (page 2 of 2)

① Horse Name

② Loan Term Term Unit

Interest Rate Compound Period

③ 1st Payment Date Frequency

Payment Amount Payment Alert

DO NOT ENTER '0' for the loan interest.
If a loan has 0% interest, enter 0.0001
in the loan interest box.

The loan will not have any interest. The
payment will be the amount displayed in
the Payment Amount box, for each
payment, for the duration of the loan.

Loan Setup Comments

④

Enter ⑤ Video Tutorial

Popup And Red Flag
equineGenie
Notes

- ① **Selection** of the *Go To Loan Setup / Payment* button on *Horse Information – Sale/Loan/Payment* (page 1) will display the *Horse Information – Sale/Loan/Payment* (page 2) screen and automatically transfer the loan *Balance Due* and *Sale Date*. The transfer activates the remainder of the *Horse Information – Sale/Loan/Payment* (page 2) screen.

Note 1: The sale date is the loan term start date. If the loan term start date needs to be changed, it can be changed 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).

- ② **Enter the loan term** in the *Loan Term* box based on the term units selected from the *Term Units* dropdown. **For Example:** if the loan term is **36 months**, then **36 would be entered in the *Loan Term* box and month(s) would be selected from the *Term Units* dropdown.**

Enter the loan's interest rate in the *Interest Rate* box.

Select the loan's compounding period from the *Compounding Period* dropdown.

Note 2: Compounding period is the time interval between when interest is added to the loan account. Interest is most often compounded annually, semi-annually, quarterly, monthly or daily.

- ③ **Enter the loan's first payment date** in the *1st Payment Date* dropdown by selecting the date from the calendar icon or 'clicking in' the *1st Payment Date* dropdown and entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

Select the loan payments frequency from the *Frequency* dropdown.

The loan payment amount will be displayed in the *Payment Amount* box.

A payment due alert can be selected from the *Payment Alert* dropdown.

Note 3: Based on the payment alert selection, equineGenie will remind you prior to a payment's due date.

- ④ **Enter** any comments or notes associated with the horse sale loan payment information.
- ⑤ **Select** enter before leaving the *Horse Information – Sale/Loan/Payment* (page 2) screen

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Horses Information – Horse Loan Payment

Path: Home: Horses: Information: *Loan Payment

There is a prerequisite setup required before a horse sale loan payment can be entered. A horse sale loan must be entered in equineGenie, (Horse Information – Sale/Loan/Payment (page 1)). (Horse Sale/Loan/Payment)

① **Select** the horse sale loan from the *Select Horse Sale Loan* dropdown.

② **Enter the loan payment date** in the *Payment Date* dropdown 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)..

③ **Enter the payment amount in the** *Payment* box.

Note 2: If a payment is entered, selection of the \$ will display the *Deposit Method* popup to initiate the financial transaction associated with the payment. Completing a payment transaction is explained in the *Deposits and Payments training documents*.

④ **If you need to remove a loan payment**, it can be removed by displaying the entire loan payment information and selecting the **Red** 'Remove Selected Loan Payment' button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the loan payment.



- After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button⑦.
- ⑤ **Enter** any comments or notes associated with the loan payment information.
 - ⑥ **If the loan of closed or paid off**, select the *Loan Closed/Payoff?* button changing it from a **Red No** to a **Green Yes**.
 - ⑦ **Select Enter before leaving the Horse Loan Payment screen.**
 - ① **Selection** of the 'Horse Loan Payments' button will enable the selected horse sale loan payment information to be viewed, exported and/or printed.
 - ② **Selection** of the 'Horse Sale Loans' enables all horse sale loan information to be viewed, exported and/or printed.

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Horses Sale with Loan Example

Horse Sale

equineGenie Horse Information - Sale/Loan/Payment

Horse Sold / Loan Setup (page 1 of 2)

Sold Horse

Purchase Information

09/05/2023

Sally Fields

1234 Some Street

Someplace, ST 99999

777.777.7777

info@fields.com

Add To Address Book

\$5,000.00

\$1,000.00

Balance Due

\$4,000.00

Go To Remove Non Asset Sale Horse?

Go To Manage Asset Sale Horse?

Non Asset Horse Sales (Dates Specified)

Sale Comments

Enter

Enter and Charge Customer (Go To Customer Billing Log)

You have entered a date or cost but have not yet associated it with a payment transaction. Please click on the payment button to complete the payment information.

All Horse Sales (Dates Specified)

Go To Loan Setup / Payment

Horse Sale Loan Setup and Payment

equineGenie Horse Information - Sale/Loan/Payment

Horse Sold / Loan Setup (page 2 of 2)

\$4,000.00

09/05/2023

36

Month(s)

5%

Monthly

10/06/2023

Monthly

\$116.88

1 Week

DO NOT ENTER '0' for the loan interest. If a loan has 0% interest, enter 0.0001 in the loan interest box.

The loan will not have any interest. The payment will be the amount displayed in the Payment Amount box, for each payment, for the duration of the loan.

Loan Setup Comments

Monthly payment of \$116.88 is due on the 6th of each month.

Enter

Popup And Red Flag equineGenie Notes

Horse Sale Loan Payment

equineGenie - Horse Loan Payment

Horse Loan Payment

Sold Horse

10/06/2023

\$116.88

☐ Remove Selected Loan Payment

☐ Loan Closed/Payoff? ☐ No

☒ Horse Sale Loan Payments
☐ Horse Sale Loans

Loans Comments

Enter

Popup
And
Red Flag

equineGenie

Notes

Horse Sale Loan Payment Report

Make Believe Ranch

Sold Horse - Loan Payments

Loan: \$ 4,000.00

Purchaser: Sally Fields
Date: September 5, . LoanTerm: 36 mo. @ 5.00 %

Date	Payment	Comments	Loan Payoff
Oct 6, 2023	\$ 116.88		\$ 3,916.04
Payments :1	Payments Amount: \$ 116.88	Last Payment Interest : \$ 16.67	
Principal Paid: \$ 100.21	Interest Paid: \$ 16.67	Loan Balance: \$ 3,899.79	

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