Riding Lessons

Instructors
Lessons Plan
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Lessons Results

Riding Lessons

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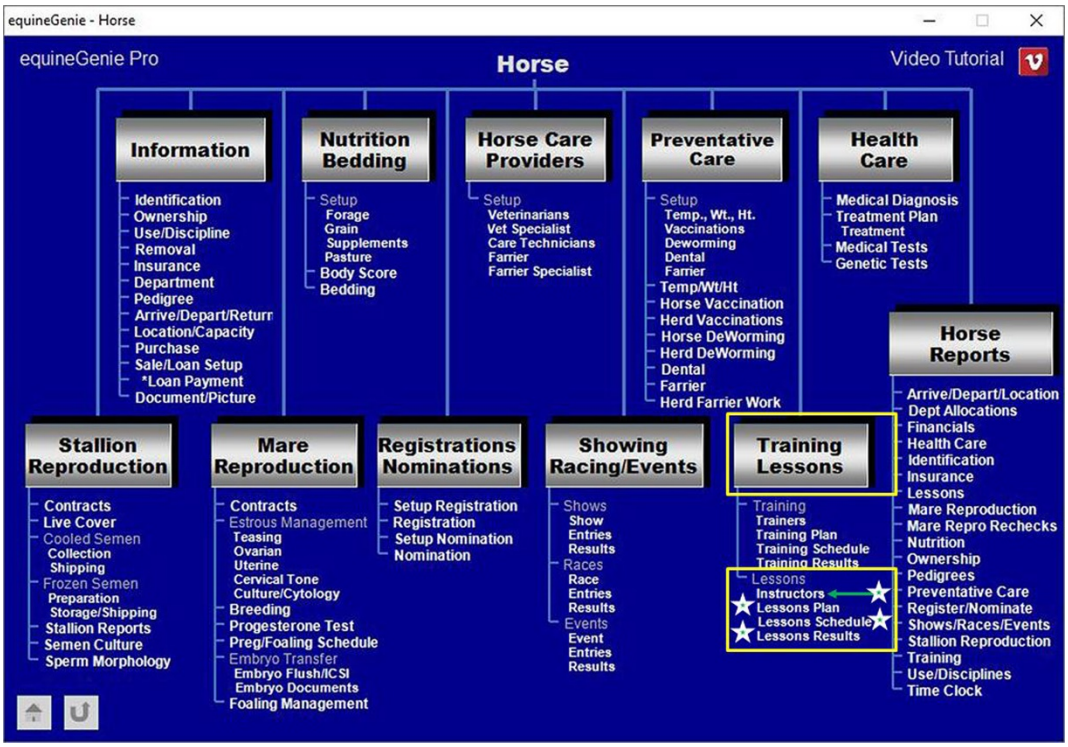
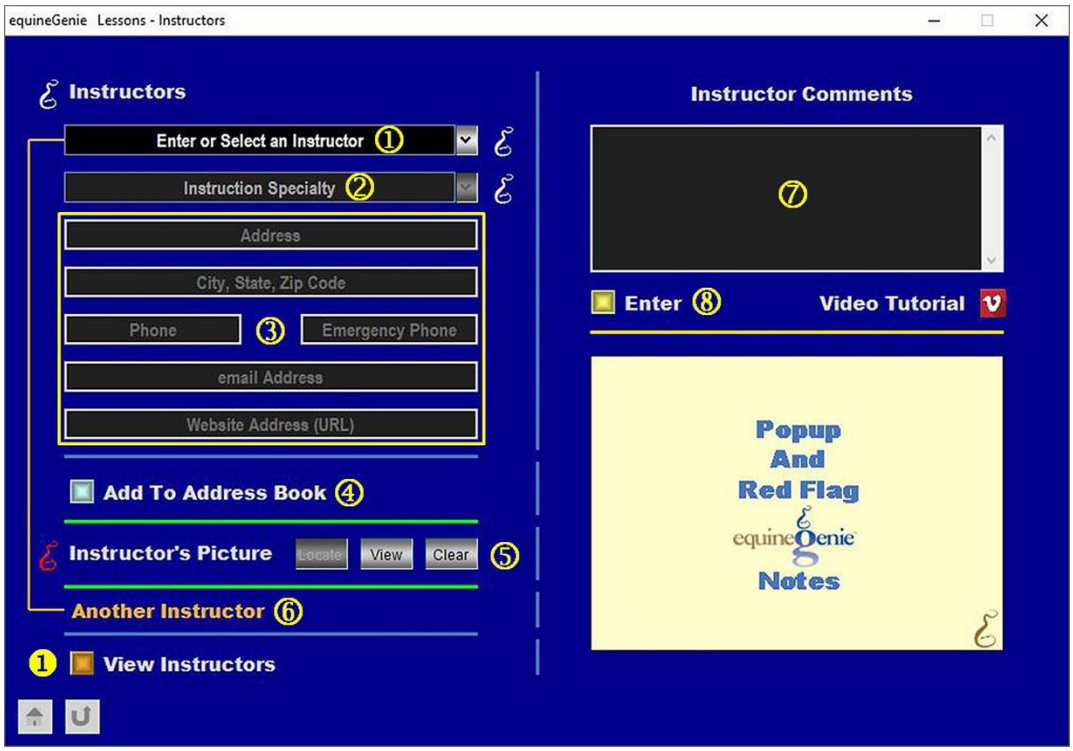
Mouse over and Click on a content subject to go to that subject



Riding Lessons – Instructors

Path: Home: Horses: Training Lessons: Lessons Instructors

There are no prerequisites required before riding instructors can be entered.



① **Enter or select** a riding instructor from the *Enter or Select An* Instructor dropdown.

Note 1: If a previous instructor had been entered, equineGenie would have remembered it and it would be available for selection. If it is a new trainer entry, select **[New Instructor]** from the *Enter or Select An* Instructor dropdown and enter the instructor. EquineGenie will remember the instructor for future selection.

② **Select the instructor's specialty** from the *Instruction Specialty* dropdown. An instruction specialty is selected by selecting the check box next to an instruction specialty. Multiple instruction specialties boxes can be checked. To remove selected specialties just uncheck a specialty box.

③ **Enter the instructor's address** in the *Address* box.

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

Enter the instructor's telephone in the *Phone* box.

Enter the instructor's emergency telephone in the *Emergency Phone* box.

Enter the instructor's email address in the *email Address* box.

Enter the instructor's website address in the *Website Address (URL)* box.

④ **The instructor's contact information can be added to the equineGenie** business address book by selecting the *Add To Address Book* button.

⑤ **To Enter an instructor's picture:**

Select the Locate button to locate the instructor's picture file. Selecting open will automatically add the instructor's picture to equineGenie. Selecting the View button allows you to view the picture. Selecting the Clear button will remove the instructor's picture from equineGenie.

⑥ **To add another instructor**, select the orange **Another Instructor**. Selecting **Another Instructor** clears the previous instructor's information enabling a new instructor to be entered.

⑥ **Enter** any comments or notes associated with the selected instructor's information.

⑦ **Select** enter before leaving the *Lessons – Instructors* screen.

❶ **Selection** of the '*View Instructors'* button will enable all the instructor's information to be viewed, exported or printed.

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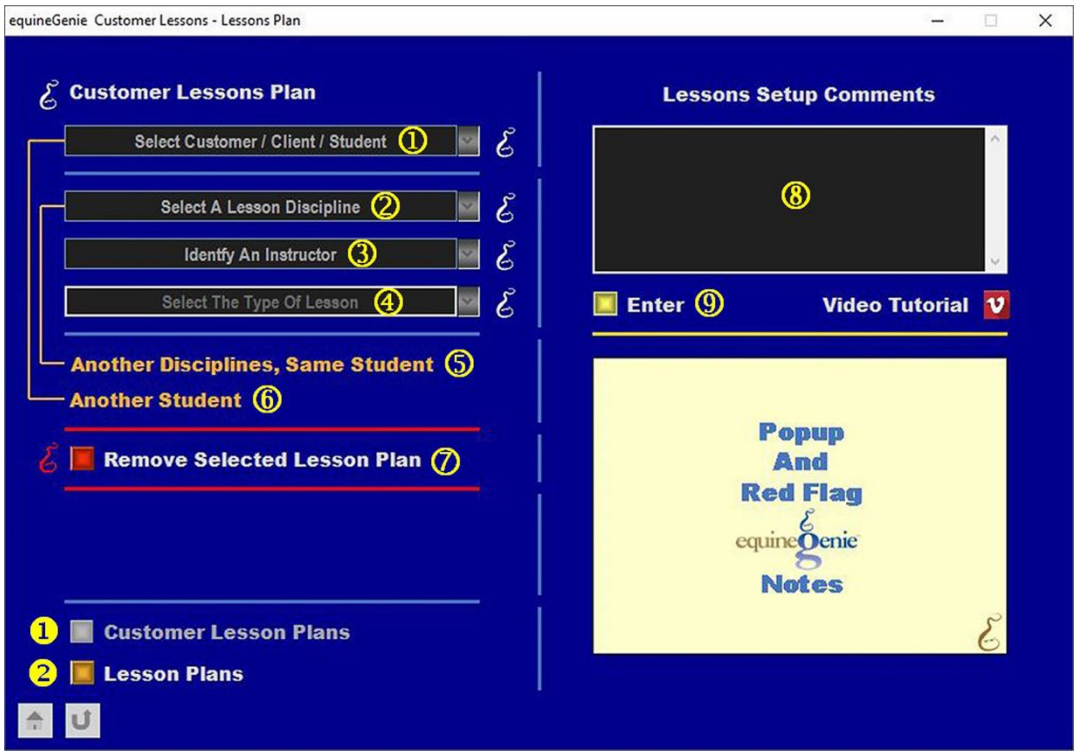
Customer Lessons – Lessons Plans

Path: Home: Horses: Training Lessons: Lessons Lessons Plans

There are prerequisites required before a customer's lesson plan can be entered. A customer must be entered in equineGenie, (Customer Clients: Customer Clients: Contact Information). An instructor must been entered and their instruction specialties identified on the Lessons – Instructors screen (Riding Lessons - Instructors).



① **Select** the riding lesson student from the *Select A Customer / Client / Student* dropdown.

Note 1: A riding student must have been previously entered in equineGenie to appear in the *Select A Customer / Client / Student* dropdown. Riding lesson students are entered in equineGenie on the *Customer Clients – Contact Information* screen.

② **Select the riding student's lesson discipline** from the *Select A Lesson Discipline* dropdown.

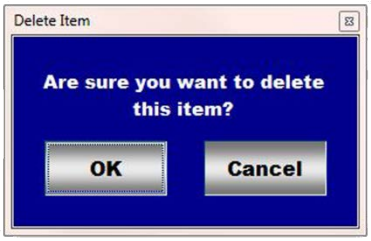
③ **Identify** an instructor from the *Identify An Instructor* dropdown. Riding instructors whose lesson specialties that were identified on the *Lessons – Instructors screen* that match the student's riding lesson discipline will be displayed in the *Identify An Instructor* dropdown.

④ **Select** the type of lesson from the *Select The Type Of Lesson* dropdown. If the lesson type is not available in the dropdown, 'click' in the *Select The Type Of Lesson* dropdown and enter the type of lesson. equineGenie will remember the type of lesson entered for future selection.

⑤ **If there is another lesson discipline for the same student**, selecting the **Another Discipline, Same Student** will enter and clear the previous discipline information so another discipline for the same student can be entered.

⑥ **If another student needs to be entered for a lesson plan**, selecting **Another Student** will enter and clear the previous plan information enabling the information for a new student's lesson plan to be entered.

⑦ **If you need to remove a lesson plan**, it can be removed by displaying the lesson plan information to be removed and selecting the **Red** *Remove Selected Lesson Plan* button. When the button is selected a ***Delete Item*** popup will be displayed to make sure you want to delete the selected lesson plan.



After selecting **OK** on the ***Delete Item*** popup you need to select the **Enter** button⑨.

⑧ **Enter** any comments or notes associated with the selected student's lesson plan information.

⑨ **Select** enter before leaving the *Customer Lessons – Lessons Plan* screen.

❶ **Selection** of the '*Customer Lesson Plan'* button will enable the selected student's lesson plan information to be viewed, exported and/or printed.

❷ **Selection** of the '*Lesson Plans'* button will enable all the students' lesson plan information to be viewed, exported and/or printed.

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Customer Lessons – Lessons Schedule

Path: Home: Horses: Training Lessons: Lessons Lessons Schedule

There are prerequisites required before a customer's lesson schedule can be entered. A customer must be entered in equineGenie, (Customer Clients: Customer Clients: Contact Information). A horse must be identified for lessons in equineGenie, ((Horses: Information: Use/Discipline (Horse Use) and (Horse Disciplines). An instructor must been entered and their instruction specialties identified on the Lessons – Instructors screen (Riding Lessons - Instructors).

① **Select** the riding lesson student from the *Select A Customer / Client / Student* dropdown.

Note 1: A riding student must have been previously entered in equineGenie to appear in the *Select A Customer / Client / Student* dropdown. Riding lesson students are entered in equineGenie on the *Customer Clients – Contact Information* screen.

② **Select the assigned lesson horse to use for the riding lesson** from the *Assign Lesson Horse* dropdown. The horse's that were identified for lessons on the *Horse Information – Use / Discipline (Horse Use)* screen are displayed in the *Assign Lesson Horse* dropdown.

Note 2: The horse's used for riding lessons must have been identified on the *Horse Information – Use / Discipline (Horse Use)* screen to be displayed in the *Assign Lesson Horse* dropdown.

If the horse is a customer's horse that is not in equineGenie, but hauled in for the riding lesson, select the *Haul In Horse?* button changing it from a **Red No** to a

Green Yes. Haul In will be automatically displayed in the *Assign Lesson Horse* dropdown.

Note 3: equineGenie credits the lesson horses for their contribution to the business's revenue. If the lesson horse is a haul in horse, equineGenie ignores their contribution and it is not counted.

③ **Select** the scheduled lesson discipline from the *Lesson Discipline* dropdown. The lesson disciplines available for selection in the *Lesson Discipline* dropdown are the lesson disciplines identified on the *Horse Information – Use / Discipline (Horse Discipline)* screen.

④ **Enter the scheduled lesson date start time** in the *Start – Date/Time* dropdown by selecting the date from the calendar icon or by selecting [New Date] from the *Start – Date/Time* dropdown and entering date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

Note 4: Selecting the date from the calendar icon will enter the selected date and your computer's current time. To change the time, mouse over it and enter the correct time.

Entering scheduled lesson date start time in the *Start – Date/Time* dropdown will enter the same date and time in the *End – Date/Time* dropdown. To change the date or time mouse over the date or time and enter the correct date or time. *The time is generally what needs to be changed unless a training session goes for more than one day.*

⑤ **If the lesson is a group lesson**, select the *Group Lesson Participant?* button changing it from a **Red No** to a **Green Yes**. equineGenie will then know which lesson to manage as individual or group lessons and bill accordingly.

⑥ **Select or enter** the type of lesson from the *Type Of Lesson* dropdown. If the lesson type is not available in the dropdown, 'click' in the *Type Of Lesson* dropdown and enter the type of lesson. equineGenie will remember the type of lesson entered for future selection.

Select or enter the lesson location from the *Lesson Location* dropdown. If the lesson location is not available in the dropdown, 'click' in the *Lesson Location* dropdown and enter the location. equineGenie will remember the lesson location entered for future selection.

Note 4: equineGenie keeps track of facility usage to help in making facility decisions.

Select an instructor from the *Select An Instructor* dropdown. Instructors whose lesson specialties that were identified on the *Lessons – Instructors* screen that match the student's selected type of lesson discipline will be displayed in the *Select An Instructor* dropdown.

Note 5: This prevents instructors being selected that are not qualified to give the selected student in the identified lesson.

Select an assistant or volunteer to assist in giving the lesson from the *Assign An Assistant / Volunteer* dropdown. If an assistant is need, but is not available in the *Assign An Assistant / Volunteer* dropdown, 'click' in the *Assign An Assistant /*

Volunteer dropdown and enter the person. equineGenie will remember the assistant or volunteer entered for future selection.

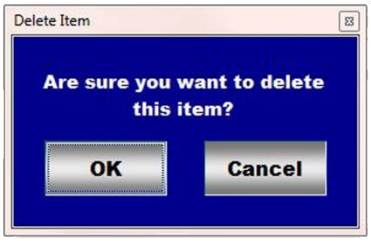
⑦ **If the same lesson needs to be scheduled on another date and time**, select the **Another Date/Time, Same Student**. Selecting **Another Date/Time, Same Student** keeps the previous lesson information; increments the previous start and end date by one day, but keeps the same start and end time. The date and or time can be changed by moussing over them and entering a new date and or time.

Note 5: This assists in expediting a student's extended lesson schedule entries.

⑧ **If another lesson discipline needs to be scheduled for the same student**, select the **Another Discipline, Same Student**. Selecting **Another Discipline, Same Student** enters and clears the previous lesson schedule information so a new lesson discipline can be scheduled.

⑨ **Selection of Another Horse, Same Student** enters and clears the horse's previous lesson schedule use information enabling a new horse's lesson schedule use to be scheduled.

⑩ **If you need to remove a selected lesson schedule**, it can be removed by displaying the lesson schedule information to be removed and selecting the **Red** *Remove Selected Lesson* button. When the button is selected a ***Delete Item*** popup will be displayed to make sure you want to delete the selected lesson schedule.



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

❶ **Enter** any comments or notes associated with the selected lesson schedule information.

❷ **Select** enter before leaving the *Customer Lessons – Lessons Schedule* screen.

❸ **Selection** of the '*Lesson Schedule Current Day'* button will enable the current day's lesson schedule to be viewed, exported and/or printed.

❹ **Selection** of the '*Lesson Day Schedule (DS)'* button will enable the lessons scheduled for the day specified to be viewed, exported and/or printed.

❺ **Selection** of the '*Student Schedule Calendar Date Specified'* button will enable the selected student's scheduled lessons within a specifies date range to be viewed, exported and/or printed in a calendar format.

❻ **Selection** of the '*Instructor Schedule Calendar Date Specified'* button will enable the identified instructor's scheduled lessons within a specified date range to be viewed, exported and/or printed in a calendar format.

❼ **Selection** of the '*Lesson Calendar Detail Date Specified'* button will enable the detail of all lessons scheduled with a date specified range to be viewed, exported and/or printed in a calendar format.

❽ **Selection** of the '*Lesson Calendar Summary Date Specified'* button will enable the summary of all lessons scheduled with a date specified range to be viewed, exported and/or printed in a calendar format.

❾ **Selection** of the '*Lesson Horse Schedule Current Month'* button will enable all lesson horse schedules in the current month to be viewed, exported and/or printed.

Note 7: All calendar format reports must be specified for a complete week in a date specified range. **For Example:** One week, September 3, 2023, through September 9, 2023; two weeks, September 3, 2023, through September 16, 2023, etc.

Student Lesson Schedule Calendar Example

Make Believe Ranch

Student: Customer #4 — *Weekly Lesson Schedule* — *September 3, 2023 to September 16, 2023*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/3	9/4	9/5 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Walk Location: Indoor Arena	9/6	9/7 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/8	9/9 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Canter Location: Indoor Arena
9/10	9/11 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/12	9/13 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Canter Location: Indoor Arena	9/14	9/15 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/16

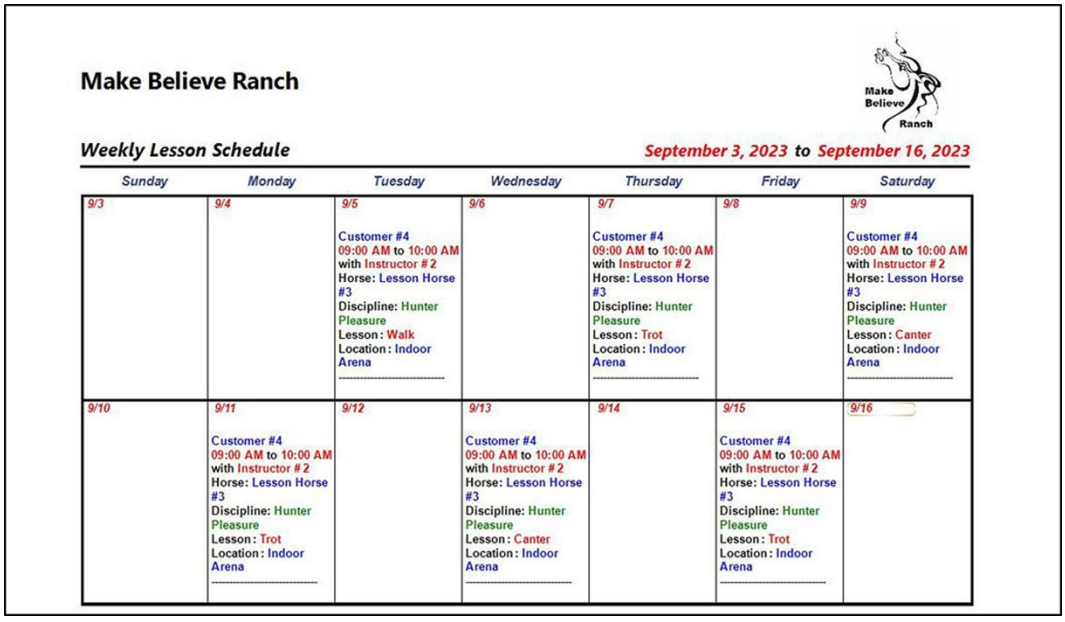
One Week Detail Lesson Schedule Calendar Example

Make Believe Ranch

Weekly Lesson Schedule — *September 3, 2023 to September 9, 2023*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/3	9/4	9/5 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Walk Location: Indoor Arena	9/6	9/7 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/8	9/9 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Canter Location: Indoor Arena

Two Week Detail Lesson Schedule Calendar Example

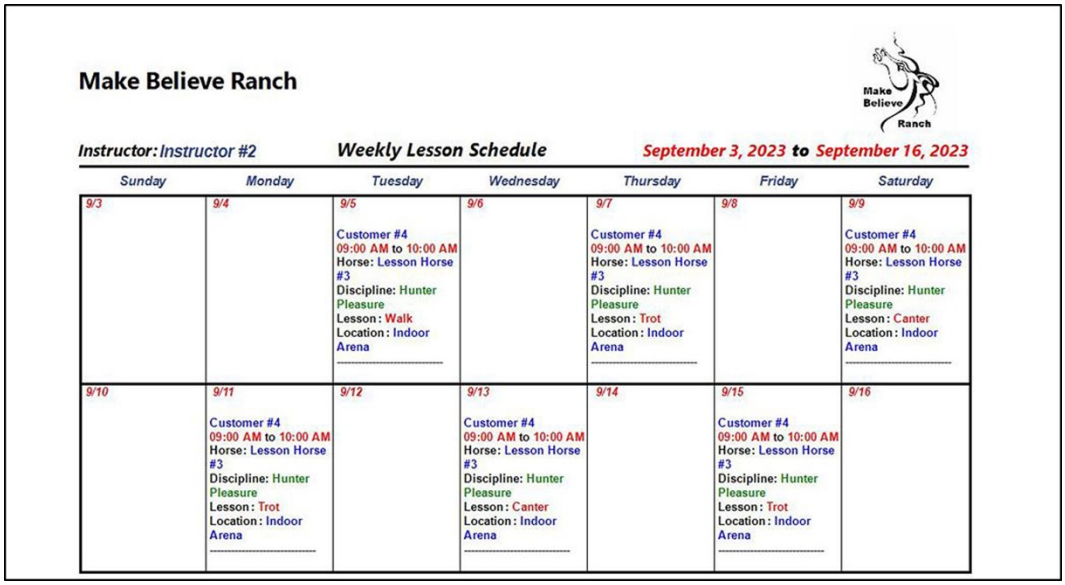


Make Believe Ranch

Weekly Lesson Schedule — *September 3, 2023* to *September 16, 2023*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/3	9/4	9/5 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Walk Location : Indoor Arena	9/6	9/7 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/8	9/9 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Canter Location : Indoor Arena
9/10	9/11 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/12	9/13 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Canter Location : Indoor Arena	9/14	9/15 Customer #4 09:00 AM to 10:00 AM with Instructor # 2 Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/16

Two Week Summary Lesson Schedule Calendar Example

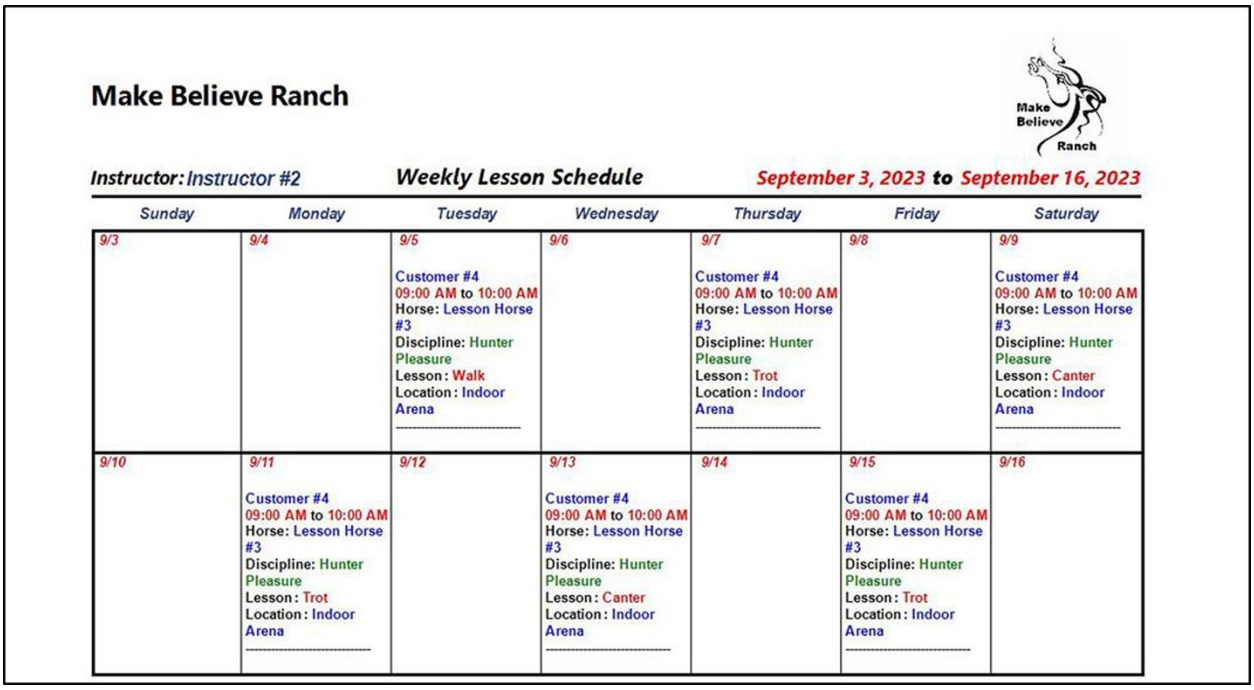


Make Believe Ranch

Instructor: Instructor #2 — *Weekly Lesson Schedule* — *September 3, 2023* to *September 16, 2023*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/3	9/4	9/5 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Walk Location : Indoor Arena	9/6	9/7 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/8	9/9 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Canter Location : Indoor Arena
9/10	9/11 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/12	9/13 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Canter Location : Indoor Arena	9/14	9/15 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson : Trot Location : Indoor Arena	9/16

Instructor Lesson Schedule Calendar Example



Make Believe Ranch

Instructor: Instructor #2 — **Weekly Lesson Schedule** — *September 3, 2023* **to** *September 16, 2023*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/3	9/4	9/5 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Walk Location: Indoor Arena	9/6	9/7 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/8	9/9 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Canter Location: Indoor Arena
9/10	9/11 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/12	9/13 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Canter Location: Indoor Arena	9/14	9/15 Customer #4 09:00 AM to 10:00 AM Horse: Lesson Horse #3 Discipline: Hunter Pleasure Lesson: Trot Location: Indoor Arena	9/16

Information: Additional lesson reports are available in the *Horse Reports – Lessons* screen. *Path - Home: Horses: Horse Reports: Lessons*.

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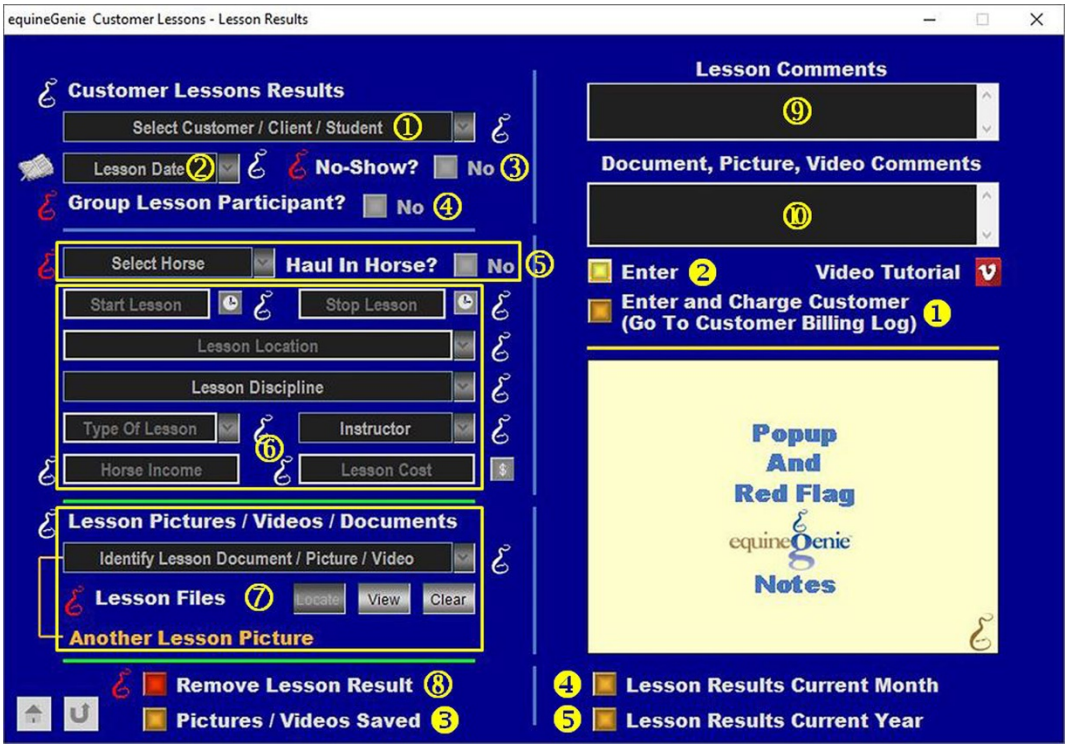
Customer Lessons – Lessons Results

Path: Home: Horses: Training Lessons: Lessons Lessons Results

There are prerequisites required before a lesson's results can be entered. A customer must be entered in equineGenie, (Customer Clients: Customer Clients: Contact Information). A horse must be identified for lessons and its lesson disciplines selected in equineGenie, (Horses: Information: Use/Discipline (Horse Use) and (Horse Disciplines). An instructor must been entered and their instruction specialties identified on the Lessons – Instructors screen (Riding Lessons - Instructors).



① **Select** the riding lesson student from the *Select A Customer / Client / Student* dropdown.

Note 1: A riding student must have been previously entered in equineGenie to appear in the *Select A Customer / Client / Student* dropdown. Riding lesson students are entered in equineGenie on the *Customer Clients – Contact Information* screen.

② **Enter** the lesson date in the *Lesson Date* dropdown by selecting **[New Date]** from the *Lesson Date* dropdown or selecting the date from the calendar icon. Selection of **[New Date]** from the *Training Date* dropdown will enter your computer's current date. The date can be changed by moussing over the date and entering a different date in the format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

③ **If the student was a no-show for the lesson**, select the *No-Show?* button changing the **Red No** to a **Green Yes**. If the *No-Show?* button is selected to a **Green Yes**, select the enter❷ button and end the lesson result entries.

④ **If the lesson result being entered is a group lesson**, select the *Group Lesson Participant?* button changing it from a **Red No** to a **Green Yes**. equineGenie will then know which lesson to manage as individual or group lessons and bill accordingly.

⑤ **Select the lesson horse used for the riding lesson** from the *Select Horse* dropdown. The horse's that were identified for lessons on the *Horse Information – Use / Discipline (Horse Use)* screen are displayed in the *Select Horse* dropdown.

Note 2: The horse's used for riding lessons must have been identified on the *Horse Information – Use / Discipline (Horse Use)* screen to be displayed in the *Select Horse* dropdown.

If the horse used for the lesson is a customer's horse that is not in equineGenie, but hauled in for the riding lesson, select the *Haul In Horse?* button changing it from a **Red No** to a **Green Yes**. Haul In will be automatically displayed in the *Select Horse* dropdown.

Note 3: equineGenie credits the lesson horses for their contribution to the business's revenue. If the lesson horse is a haul in horse, equineGenie ignores their contribution and it is not counted.

⑥ **Enter the lesson start time** in the *Start Lesson* box by selecting the time from the clock icon. If the time entered from the clock icon is incorrect it can be changed by moussing over the time and entering the actual training start time.

Enter the lesson stop time in the *Stop Lesson* box by selecting the time from the clock icon. If the time entered from the clock icon is incorrect it can be changed by moussing over the time and entering the actual training start time.

Select the lesson location from the *Lesson Location* dropdown. If the lesson location is not available in the dropdown, 'click' in the *Lesson Location* dropdown and enter the location. equineGenie will remember the lesson location entered for future selection.

Select the lesson discipline from the *Lesson Discipline* dropdown. The only lesson disciplines available for selection from the *Lesson Discipline* dropdown are the lesson disciplines entered on the student's lesson plan screen in this document. (***Customer Lessons – Lessons Plans***).

Important: If the lesson horse is a haul in, the *Lesson Discipline* dropdown will display all the lesson disciplines for possible selection. It is your responsibility to select the desired lesson disciple.

Select the type of lesson from the *Type Of Lesson* dropdown. If the type of lesson is not available in the dropdown, 'click' in the *Type Of Lesson* dropdown and enter the type of lesson. equineGenie will remember the type of lesson location entered for future selection.

Select the Instructor from the *Instructor* dropdown. An instructor identified on the student's lesson plan screen will be automatically displayed in the *Instructor* dropdown. If the Instructor needs to change, all identified instructors identified on the *Lessons – Instructors* screen will be available for selection from the *Instructor* dropdown.

Important: If the lesson horse is a haul in, the *Instructor* dropdown will display all the lesson instructors for possible selection. It is your responsibility to select the instructor qualified to give the lesson.

If the lesson includes horse income, enter the horse's income the *Horse Income* box.

Enter any cost to the business associated with the lesson in the *Lesson Cost* box.
For Example: A business cost could be the instructor's charge to the business for giving the lesson.

Note 2: If a business cost is entered, the **$** to the right of the *Cost* box will turn **Red**. Selection of the **$** will display the *Payment Method* popup to initiate recording the financial transaction associated with giving the lesson. Completing a payment transaction is explained in the *Deposits and Payments training documents*.

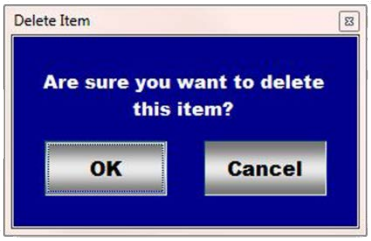
⑦ **To Enter any lesson documents, pictures or videos for the lesson result:**

Enter or select the item's storage identity from the *Identify Lesson Documents / Picture / Videos* dropdown. To enter a new storage item, select **[New Item]** from the *Identify Lesson Document / Picture / Videos* dropdown and add the new item's identity. To recall a previously stored item, select the item's identity from the *Identify Lesson Document / Picture / Videos* dropdown.

The item can be stored in equineGenie by selecting the Locate button to locate the item's file. Selecting open will automatically add it to equineGenie. Selecting the View button allows you to view the item. Selecting the Clear button will remove the item from equineGenie.

To store another item for the same lesson, select the orange **Another Lesson Picture**. Selecting **Another Lesson Picture** clears the previous item's storage information enabling a new item to be entered.

⑧ **If you need to remove a selected lesson result**, it can be removed by displaying the lesson result information to be removed and selecting the **Red** *Remove Lesson Result* button. When the button is selected a ***Delete Item*** popup will be displayed to make sure you want to delete the selected lesson result.



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

⑨ **Enter** any comments or notes associated with the selected lesson result information.

⑩ **Enter** any comments or notes associated with the selected lesson document, picture or video information.

❶ If the student getting the lesson is a customer, **selecting** the, '*Enter and Charge Customer (Go To Customer Billing Log)*' button will enter the student's lesson results

information; any lesson results financial transaction and display the *Customer Billing Log*. The customer's name and the lesson date will be automatically displayed on the *Customer Billing Log.*

Important: To charge a customer for a lesson from the *Customer Lessons - Lesson Results* screen, the customer's financial information and their billing management must have been previous setup.

❷ **Select** enter before leaving the *Customer Lessons – Lesson Results* screen.

❸ **Selection** of the '*Pictures / Videos Saved'* button will enable a list of the lesson documents, pictures and videos to be viewed, exported and/or printed.

❹ **Selection** of the '*Lesson Results Current Month'* button will enable the lesson results for the current month to be viewed, exported and/or printed.

❺ **Selection** of the '*Lesson Results Current Year'* button will enable the lesson results for the current year to be viewed, exported and/or printed.

Information: Additional lesson reports are available in the *Horse Reports – Lessons* screen. *Path - Home: Horses: Horse Reports: Lessons*.

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