Vehicles and Vehicle Management

Vehicle Setup
Maintenance Schedules
Insurance
Fuel and Fuel Use
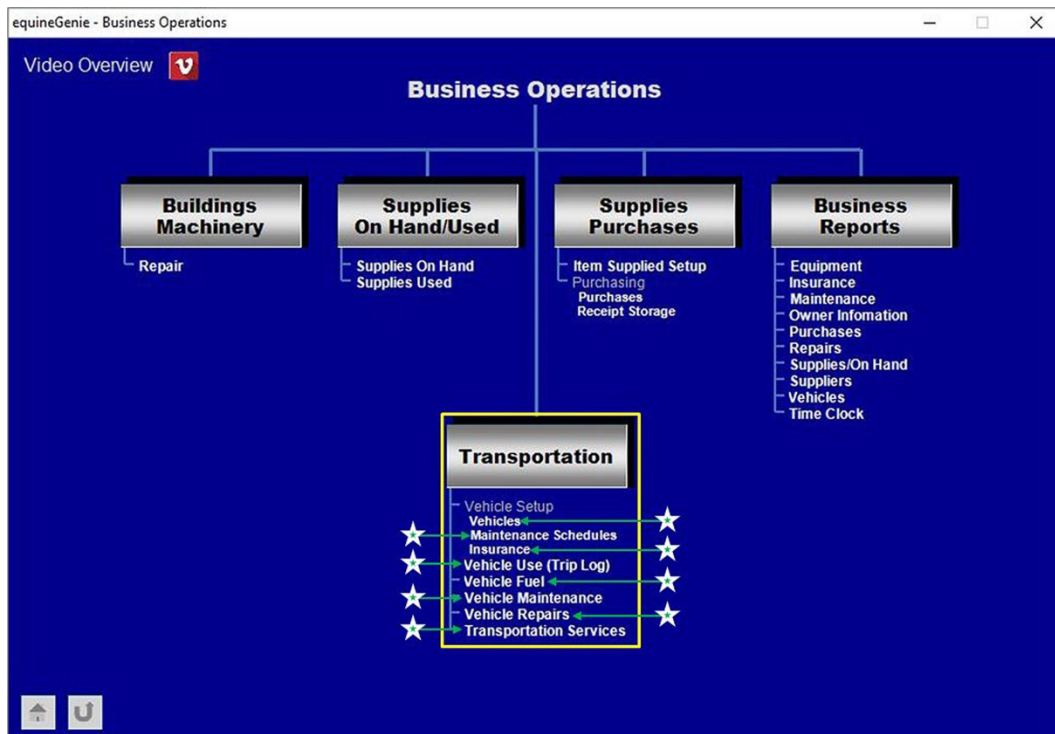## Maintenance and Repairs
Transportation Services

Business Operations – Vehicles and Vehicle Management

Table of Contents

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

Vehicle Introduction

The vehicles you use in your horse business are a large capital investment. Keeping track of the scheduled maintenance and getting your vehicles service regularly will not only protect your investment, but will minimize future repairs. equineGenie enables you to track, manage and report on keeping your business vehicles in top shape and available.

Return to the Table of Content

Business Operations – Vehicles Setup

Path: Home: Business Operations: Transportation: Vehicles

There are no prerequisites required.

Think/Plan before you setup your business's vehicles! Vehicles can be setup to be depreciated or for a mileage deduction. A vehicle can be assigned to a department or multiple departments on a percentage basis.

Note: Setting up a vehicle for a mileage deduction requires tracking and entering a vehicle's use. It is worth doing. You not only get an accurate mileage deduction, you get an accurate trip log, both of which satisfy the IRS for tax purposes.

① **To enter a vehicle**, select **[New Vehicle]** from the *Select / Enter Vehicle* dropdown, click in the *Select / Enter Vehicle* dropdown and enter the Vehicle.

Important: If you need to change the vehicle's name or any information associated with the vehicle, select the vehicle from the *Select / Enter Vehicle* dropdown and make the appropriate changes.

② **Enter the vehicle's setup date** in the Setup 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).

③ **Enter the vehicle's odometer reading** on the date when the vehicle is setup.

Note 1: equineGenie will automatically display the odometer unit of measure from the business's measurement system preference identified on the *Business Owner - Preferences* screen. *Path – Home: Business Information: Preferences*

④ **Enter how the Vehicle is used in your business** by clicking in the *Vehicle Use* dropdown and entering how the vehicle is used.

Note 2: If a new use is entered, it will be remembered by equineGenie and available for future selection.

⑤ **Enter the IRS standard mileage deduction** in the *Deduction / Mile* box.

Very Important: equineGenie will track, compute and report a vehicle's mileage deduction based on the vehicle's odometer entries on the *Vehicle Use (Trip Log)* (*Vehicle Fuel Use (Trip Log*) screen. **Entering your odometer reading and keeping your annual IRS mileage deduction up to date** is a required discipline. This is a requirement to have an accurate mileage deduction on your taxes and a trip log if you are asked to participate in an IRS audit.

⑥ **The use of a selected vehicle can be allocated to one or more departments**. A department can be selected from the *Assign A Department* dropdown. The dropdown will display all the business departments that were identified on the *Business Owner – Departments*/Projects screen. *Path – Home: Business Information: Departments/Projects*

A vehicle's use is allocated to a department on a percentage basis. The allocation percentage is selected from the % Allocation dropdown or entered.

Note 3: The dropdown allocation percentage is in 5% increments. If an allocation percentage required isn't available in the dropdown, the required percentage can be entered by selecting a percentage, moussing over it and changing it to the required percentage.

As each vehicle allocation percentage is assigned to a department the total of all assigned percentages for the selected vehicle will be displayed. **The percentage should not exceed 100% for obvious reasons**.

If the selected vehicle needs to be assigned to multiple departments, **Another Department** can be selected. The current department assignment and allocation will be entered and cleared so another department can be assigned and allocated.

⑦ **If you need to remove a vehicle**, it can be removed by displaying the vehicle's information and selecting the *Remove Selected Vehicle (Caution)!* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the vehicle.

After selecting **OK** on the *Delete Item* popup you need to select the **Enter**⑨ button.

Note 4: Read the Red Genie Note beside the *Remove Selected Vehicle (Caution)!* button. The **Red** Genie Note will explain what conditions must be met to remove the selected vehicle. Removing a vehicle will completely remove the selected vehicle from equineGenie. Caution should be taken when removing a vehicle. Understand that any previous transactions involving the vehicle being removed could be unavailable. *Leaving a vehicle and not using it in the future is often the best decision. Leaving it will not affect equineGenie's performance!*

⑧ **Enter** any comments or notes associated with the selected vehicle information.

⑨ **Select** enter before leaving the *Business – Vehicle Setup* screen.

❶ **Selection** of the '*Selected Vehicle'* button will enable the selected vehicle's information to be viewed, exported and/or printed.

❷ **Selection** of the '*All Vehicles*' button will enable all the entered vehicles information to be viewed, exported and/or printed.

Information: Additional vehicle reports are available in the *Business Reports – Vehicles* screen.
Path - Home: Business Operations: Business Reports: Vehicles

Business Operations – Vehicle Maintenance Schedules

Path: Home: Business Operations: Transportation: Vehicles

There is a prerequisites required. At least one vehicle must have been previously setup before any vehicle maintenance can be scheduled.

Think/Plan before you setup your vehicles scheduled maintenance! A vehicle's maintenance is user defined and can be mileage of interval scheduled.

Note: Scheduled maintenance can include oil changes, tire rotation, wheel bearing packs, general checkups, etc.

① **Select a vehicle** from the *Select Vehicle* dropdown whose maintenance needs to be scheduled.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

② **Enter the vehicle's scheduled maintenance** in the *Scheduled Maintenance* dropdown by selecting **[New Maintenance]** and clicking in the *Scheduled Maintenance* dropdown and entering the maintenance.

Note 1: If a new scheduled maintenance is entered, it will be remembered by equineGenie and available for future selection.

③ **A vehicle's scheduled maintenance can be scheduled** based on a mileage interval. If a mileage interval needs to be scheduled select the *Scheduled Mileage* button and enter the mileage interval in the *Mileage* box.

If the scheduled maintenance setup is the initial setup enter the previous mileage in the *Mileage* box.

The mileage unit of measure will be automatically displayed to the right of the *Previous Mileage* label *Mileage* box.

Note 2: equineGenie will automatically display the mileage unit of measure from the business's measurement system preference identified on the *Business Owner - Preferences* screen. *Path – Home: Business Information: Preference*

④ **A vehicle's scheduled maintenance can be scheduled** based on a period frequency interval. If a frequency interval is scheduled select the *Scheduled Frequency* button and select the period frequency from the *Frequency* dropdown.

If the scheduled maintenance setup is the initial setup enter the *Previous Date* 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).

Note 3: equineGenie will schedule, monitor and remind the business when the selected vehicle's scheduled maintenance is due. Selection of the reminder will display *the Business - Vehicle Maintenance* screen with the scheduled maintenance information. *Path – Home: Business Operations: Transportation: Vehicle Maintenance.*

⑤ **A vehicle's scheduled maintenance reminder** can be deleted or changed by selecting the *Delete Frequency Reminder* **Red** button.

Note 4: If the maintenance frequency reminder is deleted it can be rescheduled or remain deleted.

⑥ Additional maintenance can be scheduled for the selected vehicle by selecting **Additional Maintenance**. Selecting **Additional Maintenance** will enter and clear the previous maintenance and so the next scheduled maintenance can be entered.

⑦ **When I scheduled maintenance is complete** the selected maintenance is complete, the Selected Maintenance Complete? button needs to be selected changing it from **Red No** to **Green Yes**. This lets equineGenie know that the scheduled maintenance was completed.

<mark>Very Important:</mark> This is a required discipline and must be done. After completing the schedule maintenance entries on the *Business – Vehicle Maintenance* screen, return to the *Business – Vehicle Maintenance Schedule* screen and execute⑦.

⑧ **Enter** any comments or notes associated with the selected vehicle schedule maintenance information.

⑨ . **Select** enter before leaving the *Business – Vehicle Maintenance Schedule* screen.

❶ **Selection** of the '*Vehicle's Date Maintenance Schedule'* button will enable the period scheduled maintenance information to be viewed, exported and/or printed.

❷ **Selection** of the '*Vehicle's Mileage Maintenance Schedule'* button will enable the mileage scheduled maintenance information to be viewed, exported and/or printed.

<mark>Information:</mark> Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles*

Business Operations – Vehicle Insurance

Path: Home: Business Operations: Transportation: Insurance

There is a prerequisite required. At least one vehicle must have been previously setup.

Think/Plan before you setup a vehicle's insurance! A vehicle's insurance can be from multiple providers and have different insurance coverage from the same provider.

① **Select** a Vehicle from the *Select Vehicle* dropdown whose insurance coverage will be entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

② **Enter an Insurance Provider** by selecting **[New Insurance Provider]** from the *Insurance Provider* dropdown, then 'click' in the *Insurance Provider* dropdown and enter the provider.

Note 1: If a new insurance provider is entered, it will be remembered by equineGenie and available for future selection.

③ **Enter the insurance provider's contact information:**

Enter the insurance provider's address in the *Address* box.

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

Enter the insurance provider's telephone number in the *Phone* box.

Enter the insurance provider's emergency phone in the *Emergency Phone* box.

④ **An Insurance Provider's contact information** can be added to equineGenie's address book by selecting the *Add To Address Book* button.

Note 2: The Insurance Provider's 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 Insurance Coverage** by select **[New Insurance Coverage]** from the *Insurance Coverage* dropdown, then 'click' in the *Insurance Coverage* dropdown and enter the coverage.

Note 3: If a new insurance coverage is entered, it will be remembered by equineGenie and available for future selection.

⑥ **Enter the insurance coverage policy information:**

Enter the insurance policy number in the *Policy #* box.

Enter the amount of the insurance coverage in the *Amount* box.

Enter the insurance coverage effective date in the *Insurance Date* box by selecting the date from the calendar icons, or entering the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy).

Select the insurance coverage renewal frequency from the *Renewal Frequency* dropdown. equineGenie will calculate a reminder to renew the insurance coverage using the insurance coverage effective date and the renewal frequency selection.

Enter the cost of the insurance coverage in the *Cost* box.

Enter the insurance coverage cost in the *Cost* box. To complete the purchase select the **Red $** button beside the *Cost* box. **Selection** of the **Red $** will display the **Payment Method popup** where the purchase payment method is selected. (*The Payment Method is explained in the Genie Academy, Deposits and Payments training document*)

Note 4: When the Payment Method is selected on the *Payment Method popup* the *Payment By popup* will appear. On all *Payment By popup* screens, selecting the **Green** *Pay* button will complete the financial transaction for the purchase and redisplay the *Business Operations – Vehicle Insurance* screen. (*The Pay button is explained in the Genie Academy, Deposits and Payments training document*)

⑦ Additional insurance coverage can be added from the selected insurance provider by selecting **Additional Coverage**. Selecting **Additional Coverage** will enter and clear the previous coverage and so the next insurance coverage from the same insurance provider can be entered.

⑧ **If you need to remove a selected Insurance Coverage**, it can be removed by displaying the insurance coverage information and selecting the *Remove Selected Insurance (Caution)!* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the insurance coverage.

Delete Item

Are sure you want to delete this item?

OK   Cancel

After selecting **OK** on the *Delete Item* popup you need to select the **Enter⑩** button.

Note 5: Removing an Insurance Coverage will completely remove the selected coverage from equineGenie. Caution should be taken when removing coverage. Understand that any previous transactions involving the coverage being removed could be unavailable.

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

⑩ **Select enter** before leaving the *Business Operations – Vehicle Insurance* screen.

❶ **Selection** of the 'View *Vehicle's Insurance'* button will enable the selected Vehicle's insurance coverage to be viewed, exported and/or printed.

❷ **Selection** of the 'View *All Vehicle Insurance*' button will enable all the vehicles insurance coverage to be viewed, exported and/or printed.

Information: Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles*

Return to the Table of Content

Business Operations – Vehicle Fuel Use (Trip Log)

Path: Home: Business Operations: Transportation: Vehicle Use (Trip Log)

There is a prerequisite required. At least one vehicle must have been previously setup.

Think/Plan before you enter your business's vehicles use! A Vehicle's use information is for mileage tracking and creating a trip log.

Note: The destination along with the starting and ending odometer readings are used to create a vehicle trip log and calculate the vehicle's mileage per trip and total mileage.

① **Select a Vehicle** from the *Select Vehicle* dropdown whose fuel use will be entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

② **Enter the vehicle's use start date and time** in the *Start Date & Time* dropdown by selecting **[New Date]** or selecting the date from the calendar icon. If **[New Date]** is selected, the date and time are entered by 'clicking' in the *Start Date & Time* dropdown and entering the date and time in the date and time format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy) and (HH:mm). If the calendar icon is selected the date and time entered is your computer's current date and time. Both can be changed by moussing over either one or both and entering the correct date and time.

Enter the vehicle's use finish date and time in the *Finish Date & Time* box. The date and time can be entered by 'clicking' in the *Finish Date & Time* box and entering the date and time in the date and time format set in your windows operating system.

(mm/dd/yyyy or dd/mm/yyyy) and (HH:mm). It can also be entered by selecting the date from the calendar icon. The date entered from the calendar icon is the selected date, but the time entered is 12:00 AM. If the time entry is important you can change the time by moussing over the time and enter the correct finish time.

③ **Select or enter the vehicle's destination** by selecting it in the *Destination* dropdown. If a destination is not available for selection, 'click' in the *Destination* dropdown and enter the destination.

Note 1: If a new destination is entered, it will be remembered by equineGenie and available for future selection.

④ **Select or enter the vehicle's destination purpose** by selecting it in the *Purpose* dropdown. If a destination is not available for selection, 'click' in the *Purpose* dropdown and enter the purpose.

Note 2: If a new purpose is entered, it will be remembered by equineGenie and available for future selection.

⑤ **Enter** the vehicle's starting odometer reading in the *Starting Odometer* box.

Enter the vehicle's ending odometer reading in the *Ending Odometer* box.

Important: The odometer readings must be entered each time a vehicle is used so that equineGenie can generate a trip log and calculate the vehicle's fuel cost per mile of use.

⑥ **If you are using the IRS standard mileage deduction** and not depreciating the selected vehicle, select the Mileage Deduction button changing it from a **Red No** to a **Green Yes**.

Very Important: equineGenie will track, compute and report a vehicle's mileage deduction based on the vehicle's odometer entries and the current IRS mileage deduction entered on the Business – Vehicle Setup (*Vehicle Setup*) screen. **Entering your odometer reading and keeping your annual IRS mileage deduction up to date is a required discipline**. This is a requirement to have an accurate mileage deduction on your taxes and a trip log if you are asked to participate in an IRS audit.

⑦ **If you need to remove a vehicle use**, it can be removed by displaying the vehicle's selected use information and selecting the *Remove Selected Vehicle Use* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the selected vehicle use.
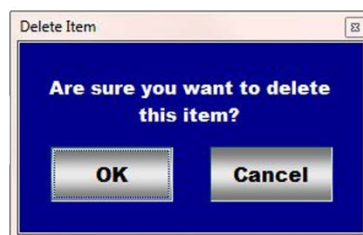
After selecting **OK** on the *Delete Item* popup you need to select the **Enter**⑨ button.

Note 3: Read the **Red** Genie Note beside the *Remove Selected Vehicle Use* button. The **Red** Genie Note will explain what conditions must be met to remove the selected vehicle use. Removing a Vehicle Use will completely remove the selected use from equineGenie.

⑧ **Enter** any comments or notes associated with the selected vehicle's use information.

⑨ **Select enter** before leaving the *Business Operations – Vehicle Use* screen.

❶ **Selection** of the '*Vehicle's Use Current Year*' button will enable the selected vehicle's current year use to be viewed, exported and/or printed.

❶ **Selection** of the '*Vehicle's Use Previous Year*' button will enable the selected vehicle's previous year use to be viewed, exported and/or printed.

❸ **Selection** of the '*Vehicle Summary Current Year*' button will enable a summary of the selected vehicle's current year use to be viewed, exported and/or printed.

❹ **Selection** of the '*Vehicle's Summary Date Specified*' button will enable a summary of the selected Vehicle's use within a specified date range to be viewed, exported and/or printed.

❺ **Selection** of the '*Destination Use Current Year*' button will enable the selected Vehicle's current year destinations to be viewed, exported and/or printed.

❻ **Selection** of the 'All *Vehicle Use*' will enable all Vehicles' use to be viewed, exported and/or printed.

<mark>**Information:**</mark> Additional vehicle reports are available in the *Business Reports – Vehicles* screen.
Path - Home: Business Operations: Business Reports: Vehicles

Return to the Table of Content

Business Operations – Vehicle Fuel

Path: Home: Business Operations: Transportation: Vehicle Fuel

There is a prerequisite required. At least one vehicle must have been previously setup.

Think/Plan before you enter a vehicle's fuel! A Vehicle's fuel information is used to track, measure and manage a vehicle's fuel use and cost, and to calculate it's per mile expense.

Note: The odometer readings and the fuel quantity purchased must be entered each time fuel is purchased so that equineGenie can calculate the vehicle's cost per mile of use.

① **Select a Vehicle** from the *Select Vehicle* dropdown whose fuel use will be entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

② **Enter the vehicle's fuel date** in the *Fuel Date* dropdown by selecting **[New Date]** or selecting the date from the calendar icon. If **[New Date]** is selected, the date is entered by 'clicking' in the *Fuel Date* dropdown and entering the date in the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy). If the calendar icon is selected the date and time entered is your computer's current date and time. Both can be changed by moussing over either one or both and entering the correct date and time.

Note 1: equineGenie does not use or report the time fuel is purchased so the correct fuel's purchase time is optional.

③ **Enter** the vehicle's odometer Reading in the *Odometer Reading* box.

Important: The odometer readings must be entered each time fuel is purchased so that equineGenie can calculate the vehicle's cost per mile of use.

④ **Select** the type of fuel purchased from the *Type Of Fuel* dropdown.

⑤ **Enter** the quantity of fuel purchase in the *Fuel Quantity* box.

Important: The Fuel Quantity must be entered each time fuel is purchased so that equineGenie can calculate the vehicle's cost per mile of use.

⑥ **Select or enter** the fuel supplier in the *Fuel Supplier* dropdown. If a fuel supplier is not available for selection, 'click' in the *Fuel Supplier* dropdown and enter the supplier.

Note 2: If a new fuel supplier is entered, it will be remembered by equineGenie and available for future selection.

⑦ **If the fuel purchase is the initial purchase** to be entered in equineGenie**,** select the *Initial Fuel Purchase* button changing it from a **Red No** to a **Green Yes**.

Note 3: Changing the *Initial Fuel Purchase* button to Yes let's equineGenie know that the fuel purchase is the initial purchase.

 Enter the fuel cost in the *Cost* box. To complete the purchase select the **Red $** button beside the *Cost* box. **Selection** of the **Red $** will display the **Payment Method popup** where the purchase payment method is selected. (*The Payment Method is explained in the Genie Academy, Deposits and Payments training document*)

Note 4: When the Payment Method is selected on the *Payment Method popup* the *Payment By popup* will appear. On all *Payment By popup* screens, selecting the **Green** *Pay* button will complete the financial transaction for the purchase and redisplay the *Business Operations – Vehicle Insurance* screen. (*The Pay button is explained in the Genie Academy, Deposits and Payments training document*)

⑧ **If you need to remove a fuel purchase**, it can be removed by displaying the fuel purchase and selecting the *Remove Selected Fuel Purchase* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the fuel purchase.

After selecting **OK** on the *Delete Item* popup you need to select the **Enter⑩** button.

Note 5: Read the **Red** Genie Note beside the *Remove Selected Fuel Purchase* button. The **Red** Genie Note will explain what conditions must be met to remove the selected fuel purchase. Removing a fuel purchase will completely remove the selected fuel purchase from equineGenie.

⑨ **Enter** any comments or notes associated with the selected vehicle's fuel purchase information.

⑩ **Select enter** before leaving the *Business Operations – Vehicle Fuel* screen.

❶ **Selection** of the '*Vehicle's Fuel Usage'* button will enable the selected Vehicle's fuel usage to be viewed, exported and/or printed.

❷ **Selection** of the '*All Vehicles Fuel Usage*' button will enable all the vehicles fuel usage to be viewed, exported and/or printed.

<mark>Information:</mark> Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles.*

Return to the Table of Content

Business Operations – Vehicle Maintenance

Path: Home: Business Operations: Transportation: Vehicle Maintenance

There is a prerequisite required. At least one vehicle must have been previously setup and have had maintenance scheduled.

Think/Plan before you enter a vehicle's schedule maintenance! In most cases the vehicle's maintenance screen will be displayed by executing a maintenance reminder. If the vehicle maintenance screen is displayed from a reminder the vehicle, the current date and the maintenance to be done will be displayed.

Note: The odometer readings must be entered each time maintenance is done on a vehicle so that equineGenie can calculate the vehicle's total cost per mile.

① **Select a Vehicle** from the *Select Vehicle* dropdown whose maintenance will be entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

Very Important: The selected vehicle must have had some scheduled maintenance previously scheduled on the *Vehicle Maintenance Schedules* screen. (*Vehicle Maintenance Schedules*)

Note 1: If the scheduled maintenance is the result of a maintenance reminder being executed, when the vehicle maintenance screen is displayed the vehicle will be displayed in the *Select Vehicle* dropdown.

② **Enter the vehicle's maintenance date** in the *Maintenance Date* dropdown by selecting **[New Date]** or selecting the date from the calendar icon. If **[New Date]** is selected, the date is entered by 'clicking' in the *Maintenance Date* dropdown and

entering the date in the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy). If the calendar icon is selected the date entered is selected date. The date can be changed by moussing over it and entering the correct date.

Note 2: If the scheduled maintenance is the result of a maintenance reminder being executed, when the vehicle maintenance screen is displayed the current date will be displayed in the *Maintenance Date* dropdown.

③ **Enter the vehicle's Odometer Reading** in the *Odometer Reading* box.

Important: The odometer readings must be entered each time maintenance is done so that equineGenie can reset the maintenance reminder if a reminder was set and calculate the vehicle's total cost per mile of use.

④ **Select or enter** the maintenance preformed from the *Maintenance* dropdown. If a maintenance selection is not available, 'click' in the *Maintenance* dropdown and enter the maintenance.

Note 3: If a new maintenance is entered, it will be remembered by equineGenie and available for future selection.

Note 4: If the scheduled maintenance is the result of a maintenance reminder being executed, when the vehicle maintenance screen is displayed the maintenance to be done will be displayed in the *Maintenance* dropdown.

Select or enter who performed the vehicle's maintenance from the *Maintenance By* dropdown. If a maintenance by selection is not available, 'click' in the *Maintenance By* dropdown and enter who performed the maintenance.

Note 5: If a new maintenance by is entered, it will be remembered by equineGenie and available for future selection.

Enter the maintenance cost in the *Maintenance Cost* box. To complete the maintenance cost select the **Red $** button beside the *Maintenance Cost* box. **Selection** of the **Red $** will display the **Payment Method popup** where the maintenance payment method is selected. (*The Payment Method is explained in the Genie Academy, Deposits and Payments training document*)

Note 6: When the Payment Method is selected on the *Payment Method popup* the *Payment By popup* will appear. On all *Payment By popup* screens, selecting the **Green** *Pay* button will complete the financial transaction for the purchase and redisplay the *Business –Vehicle Maintenance* screen. (*The Pay button is explained in the Genie Academy, Deposits and Payments training document*)

Additional maintenance on the same date can be entered for the selected vehicle by selecting **Additional Maintenance Same Date**. Selection of **Additional Maintenance Same Date** will enter and clear the previous maintenance information so an additional maintenance can be entered.

⑤ **A selected vehicle's total maintenance cost** is displayed to the right of the *Vehicle Total Maint. Cost:* label.

⑥ **If you need to remove a scheduled maintenance**, it can be removed by displaying the vehicle's maintenance information and selecting the *Remove Selected*

Scheduled Maintenance **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the maintenance.
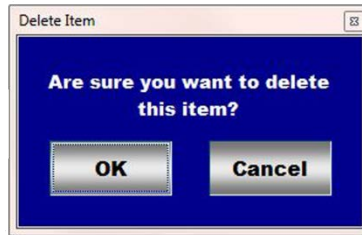
After selecting **OK** on the *Delete Item* popup you need to select the **Enter⑧** button.

Note 7: Read the **Red** Genie Note beside the *Remove Selected Scheduled Maintenance* button. The **Red** Genie Note will explain what conditions must be met to remove the selected maintenance. Removing a maintenance will completely remove the selected maintenance from equineGenie.

⑦ **Enter** any comments or notes associated with the selected vehicle's maintenance information.

⑧ **Select enter** before leaving the *Business – Vehicle Maintenance* screen.

❶ **Selection** of the 'View *Vehicle Maintenance YTD'* button will enable the selected vehicle's year to date maintenance to be viewed, exported and/or printed.

❷ **Selection** of the 'View All *Vehicle Maintenance*' button will enable all vehicle maintenance to be viewed, exported and/or printed.

Information: Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles.*

Return to the Table of Content

Business Operations – Vehicle Repairs

Path: Home: Business Operations: Transportation: Vehicle Repair

There is a prerequisite required. At least one vehicle must have been previously setup.

Think/Plan before you enter a vehicle's repair! A vehicle's repairs are included in the vehicle's total cost per mile.

Note: The odometer readings must be entered each time a repair is done on a vehicle so that equineGenie can calculate the vehicle's total cost per mile.

① **Select a Vehicle** from the *Select Vehicle* dropdown whose repair will be entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*).

② **Enter the vehicle's repair date** in the *Repair Date* dropdown by selecting **[New Date]** or selecting the date from the calendar icon. If **[New Date]** is selected, the date is entered by 'clicking' in the *Repair Date* dropdown and entering the date in the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy). If the calendar icon is selected the date entered is selected date. The date can be changed by moussing over it and entering the correct date.

③ **Enter the vehicle's Odometer Reading** in the *Odometer Reading* box.

Important: The odometer readings must be entered each time a repair is done so that equineGenie can calculate the vehicle's total cost per mile of use.

④ **Select or enter** the repair preformed from the *Repair* dropdown. If a repair selection is not available, 'click' in the *Repair* dropdown and enter the repair.

Note 3: If a new repair is entered, it will be remembered by equineGenie and available for future selection.

> **Select or enter** who performed the vehicle's maintenance from the *Repaired By* dropdown. If a repaired by selection is not available, 'click' in the *Repaired By* dropdown and enter who performed the repair.

Note 5: If a new repaired by is entered, it will be remembered by equineGenie and available for future selection.

> **Enter the repair cost** in the *Repair Cost* box. To complete the repair cost select the **Red $** button beside the *Repair Cost* box. **Selection** of the **Red $** will display the **Payment Method popup** where the repair payment method is selected. (*The Payment Method is explained in the Genie Academy, Deposits and Payments training document*)

Note 6: When the Payment Method is selected on the *Payment Method popup* the *Payment By popup* will appear. On all *Payment By popup* screens, selecting the **Green** *Pay* button will complete the financial transaction for the repair and redisplay the *Business –Vehicle Repairs* screen. (*The Pay button is explained in the Genie Academy, Deposits and Payments training document*)

> Additional maintenance on the same date can be entered for the selected vehicle by selecting **Additional Repair Same Date**. Selection of **Additional Repair Same Date** will enter and clear the previous repair information so an additional repair can be entered.

⑤ **A selected vehicle's total repair cost** is displayed to the right of the *Vehicle Total Repair Cost:* label.

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

> After selecting **OK** on the *Delete Item* popup you need to select the **Enter⑧** button.

Note 7: Read the **Red** Genie Note beside the *Remove Selected Scheduled Repair* button. The **Red** Genie Note will explain what conditions must be met to remove the selected repair. Removing a repair will completely remove the selected repair from equineGenie.

⑦ **Enter** any comments or notes associated with the selected vehicle's repair information.

⑧ **Select enter** before leaving the *Business – Vehicle Repairs* screen.

❶ **Selection** of the 'View *Vehicle Repairs YTD'* button will enable the selected vehicle's year to date repairs to be viewed, exported and/or printed.

❷ **Selection** of the 'All *Vehicle Repairs*' button will enable all vehicle repairs to be viewed, exported and/or printed.

Information: Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles.*

Return to the Table of Content

Path: Home: Business Operations: Transportation: Transportation Services

There is a prerequisite required. At least one vehicle must have been previously setup.

Think/Plan before you enter a vehicle's transportation services! A vehicle's transportation services are included in the vehicle's total income.

Note: The odometer readings must be entered each time a vehicle's service is provided so that equineGenie can calculate the vehicle's total income per mile.

① **Select a Vehicle** from the *Select Vehicle* dropdown that will be used for the transportation service being entered.

Important: At least one vehicle must have been previously entered in equineGenie (*Vehicle Setup*)

② **Select or enter a customer** from the *Select / Enter Customer* dropdown. Any previously entered customers in equineGenie will be displayed in *the Select / Enter Customer* dropdown and can be selected without having to enter a new customer. If a new customer needs to be added select **[New Customer]** from the *Select / Enter Customer* dropdown, then 'click' in the dropdown and enter the customer.

Important: If a new customer is added, the new customer will be added to the equineGenie client database table for future selection. However, to invoice the added customer, you will need to complete the added customer's contact information, set up a financial account with an account number and payment terms and add the customer to billing management.

③ **Enter the transportation service date** in the *Service Date* dropdown by selecting **[New Date]** or selecting the date from the calendar icon. If **[New Date]** is selected, the date is entered by 'clicking' in the *Service Date* dropdown and entering the date in the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy). If the calendar icon is selected the date entered is selected date. The date can be changed by moussing over it and entering the correct date.

④ **Select or enter the transportation service** provided from the *Service* dropdown. If a new service needs to be added, 'click' in the *Service* dropdown and enter the new transportation service.

Note 1: If a new service is entered, it will be remembered by equineGenie and available for future selection.

⑤ **Select or enter the starting location** from the *Starting Location* dropdown. If a new starting location needs to be added, 'click' in the *Starting Location* dropdown and enter the new location.

Note 2: If a new starting location needs to be added, 'click' in the *Starting Location* dropdown and enter the new location.

⑥ **Select or enter the vehicle's destination** from the *Destination* dropdown. by clicking in the Destination dropdown and entering the destination.

Note 3: If a new destination needs to be added, 'click' in the *Destination* dropdown and enter the new destination.

⑦ **Enter the vehicle's starting odometer reading** in the *Starting Odometer* box.

Enter the vehicle's ending odometer reading in the *Ending Odometer* box.

Very Important: The odometer readings must be entered each time a service is provided. equineGenie calculate the transportation charge and the vehicle's total income per mile/km of selected service.

Note 4: equineGenie uses the starting and ending odometer entries to calculate the transportation service mileage. equineGenie then multiplies the mileage by the vehicle's hire rate to compute the selected vehicle's transportation service income. A vehicle's hire rate is the rate entered on this screen.

⑧ **Enter the vehicle's hire rate** in the *Hire Rate ($)* box.

Select the vehicle's unit of hire rate from the *Hire Rate Unit* dropdown.

⑨ **If you need to remove a vehicle service**, it can be removed by displaying the selected vehicle's service information and selecting the *Remove Selected Vehicle Service* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the selected vehicle's service.
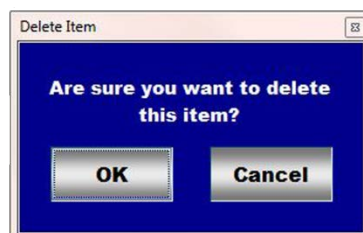
After selecting **OK** on the *Delete Item* popup you need to select the **Enter**❷ button.

Note 5: Read the **Red** Genie Note beside the *Remove Selected Vehicle Service* button. The **Red** Genie Note will explain what conditions must be met to remove the selected repair. Removing a vehicle service will completely remove the selected servicefrom equineGenie.

⑩ **Enter** any comments or notes associated with the selected vehicle's service information.

❶ If the transportation service is provided to a customer, **selecting** the, '*Enter and Charge Customer (Go To Customer Billing Log)*' button will enter the transportation service information; any service financial transaction and display the *Customer Billing Log*. The customer's name and the transportation date will be automatically displayed on the *Customer Billing Log.*

Important: To charge a customer for a transportation service from the *Business Operations – Transportation Services* screen, the customer's financial information and their billing management must have been previous setup.

❷ **Select enter** before leaving the *Business Operations – Transportation Services* screen.

❸ **Selection** of the '*Transportation Service Income YTD'* button will enable the selected vehicle's current year transportation service income to be viewed, exported and/or printed.

❹ **Selection** of the '*All Transportation Service Incomer*' button will enable all the vehicles' year to date transportation service income to be viewed, exported and/or printed.

Information: Additional vehicle reports are available in the *Business Reports – Vehicles* screen. *Path - Home: Business Operations: Business Reports: Vehicles.*

Return to the Table of Content