



Calendar Contacts

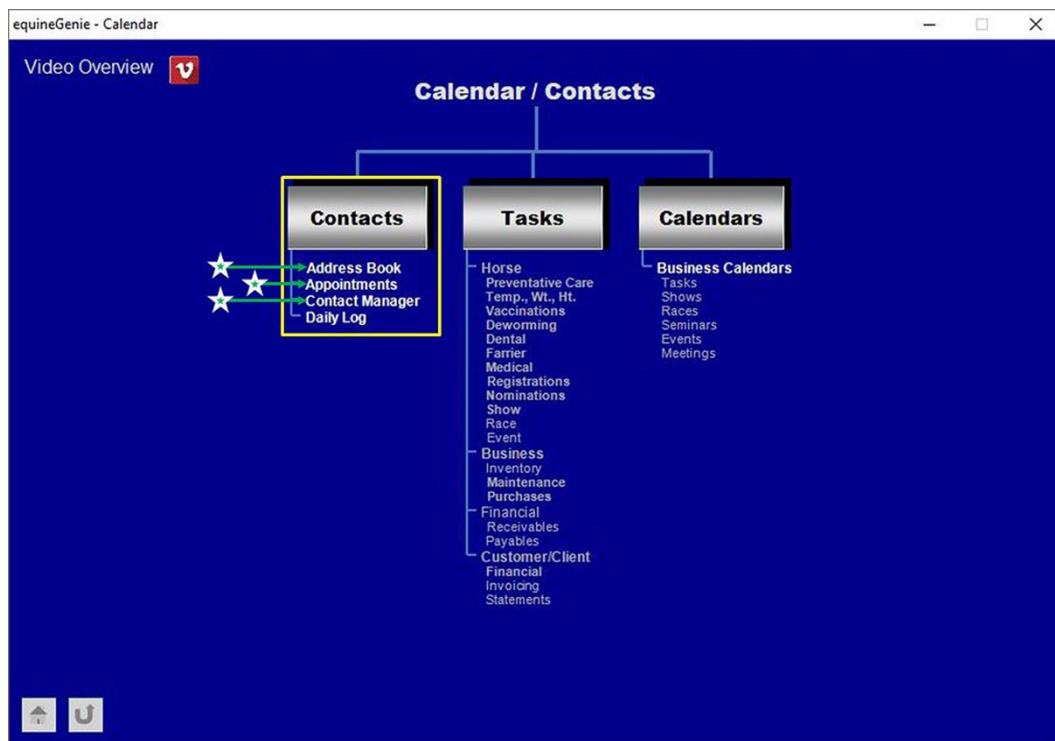
Address Book
Appointments
Contact Manager

Calendar Contacts – Contact Management

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Calendar Contacts – Address Book

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There are no prerequisite setups required before an address book entry can be entered.

Think/Plan before entering a business address book entry.

Important: There is no limit to the number of business addresses that can be entered, viewed and or printed in equineGenie. Addresses added from other equineGenie screens when the 'Add to Address Book' button is selected are automatically added to the equineGenie address book. **However**, the address information added from other equineGenie screens is only the address information entered on the associated screen.

① **Select or enter the address contact** from the *Select / Enter Address Contact* dropdown. If it is a previous address contact entered that you want to recall, select the address contact name from the *Select / Enter Address Contact* dropdown. If a new address contact is being entered, select **[New Address Contact]** from the *Select / Enter Address Contact* dropdown, 'click' in the *Select / Enter Address Contact* dropdown and enter the new contact.

② **If you need to remove an address contact**, it can be removed by displaying the address contact's information and selecting the *Remove Selected Address* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the selected address contact.



After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button⑥.

Note 1: Read the '**RED**' Genie Note beside the *Remove Selected Address* button. The '**RED**' Genie Note will explain what conditions must be met to remove the selected address contact. Selecting remove will completely remove the selected address contact from equineGenie.

- ③ If an address contact's correspondence needs to be sent to an alternative contact, the alternative address contact can be added to the *Alternative Correspondence Recipient* text box.

Note 2: For example, the alternate correspondence address contact would be identified if an address contact is under age and an invoice or other business charges need to be sent to the another person who is responsible for financial obligations. For example; if a parent or guardian, or someone else, is responsible for paying the address contact's business charges the entry could be, % **an alternative address contact**.

- ④ **Enter** an address contact's ranch name or business name in the *Ranch or Business / Parent - Guardian* text box. (**Optional**)

Note 3: If a ranch name is entered it will appear on an address contact's address label.

- ⑤ **Enter** the address contact's address in the *Address* text box.

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

Enter the address contact's telephone number in the *Telephone* text box.

Enter the address contact's s emergency telephone number in the *Emergency Phone* text box.

Enter the address contact's cell telephone number in the *Mobile Phone* text box.

Enter the address contact's fax number in the *Fax Number* text box. (**Optional**)

Note 4: If the address contact is not responsible for any business charges the address in the contact information should be the address, phone and fax information of the person responsible to paying any business charges.

Enter the address contact's email address in the *email Address* text box.

Note 5: If the address contact is not responsible for any business charges the email address in the *email Address* text box should be the email address of the the person responsible to paying any business charges.

Enter the address contact's business connection to your horse business in the *Business Connection* dropdown.

Note 6: If the desired business connection was previously entered, it can be selected from the Business Connection dropdown. If a new business connection is added it will be remembered by equineGenie for future selection.

- ⑥ **A picture of the selected address contact can be added** to equineGenie for the selected customer / client by selecting the Locate button to locate the picture file. Opening the picture file will automatically add it to equineGenie. Selecting the View button allows you to view the picture. Selecting the Clear button will remove the picture.

Note 7: A address contact's picture needs to have a 3:2 aspect ratio. This means the picture needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2.

- ⑦ **Enter** any comments or notes associated with the selected address contact's entry information.
- ⑧ **Select** enter before leaving the *Contacts – Address Book* screen.
- ① **Selection** of the '*Selected Calendar (Chronological)*' button will enable the selected calendar's information within a specified date range to be viewed, exported and/or printed in a chronological format.
- ② **Selection** of the '*Selected Calendar (Calendar)*' button will enable the selected calendar's information within a specified date range to be viewed, exported and/or printed in a calendar format.

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Calendar Contacts – Appointments

Path: Home: Calendar Contacts: Calendar / Contacts: Contacts: Appointments

There are no prerequisite setups required before a business appointment can be entered.

Think/Plan before entering a business appointment!

Important: *There is no limit to the number of business appointments that can be entered, viewed and or printed in equinegenie.*

The screenshot shows the 'equineGenie Contacts - Appointments' window. The left pane has a blue background with white text. It includes a header 'Appointments' with a horse icon. Below it are four dropdown menus, each with a yellow circle number: 1 for 'Select / Enter An Appointment', 2 for 'Select / Enter The Appointment Purpose', 3 for 'Date and Time', and 4 for 'Notification Time'. There is also a red button with a white horse icon and the text 'Delete Appointment Reminder' with a yellow circle number 5. At the bottom of the left pane are two checkboxes: '1 Current Year Appointments' and '2 Date Specified Appointments'. The right pane has a blue background with white text. It has a header 'Appointments Comments'. Below it is a large black text area with a yellow circle number 6. Below the text area is a yellow button with a green horse icon and the text 'Enter' with a yellow circle number 7. To the right of the 'Enter' button is a red button with a white horse icon and the text 'Video Tutorial'. At the bottom of the right pane is a yellow box with the text 'Popup And Red Flag equineGenie Notes'.

- ① **Select or enter a business appointment** from the *Select / Enter An Appointment* dropdown. If it is a previous appointment entered that you want to recall, select the business appointment name from the *Select / Enter An Appointment* dropdown. If a new appointment is being entered, select **[New Appointment]** from the *Select / Enter An Appointment* dropdown, 'click' in the *Select / Enter An Appointment* dropdown and enter the business appointments name. equineGenie will remember the appointment entered for future selection.

Note 1: A business appointment name can be any name you chose. **Suggestion:** Make the business appointment name descriptive enough so that it can be recalled and viewed by someone other than the person who entered it.

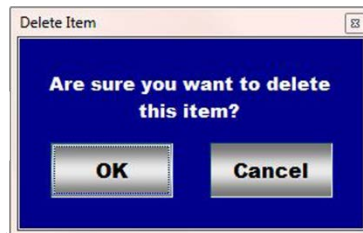
- ② **Select or enter the appointment purpose** from the *Select / Enter The Appointment Purpose* dropdown. If it is a previous appointment purpose entered that you want to recall, select the business appointment name from the *Select / Enter The Appointment Purpose* dropdown. If a new appointment is being entered, select **[New Appointment Purpose]** from the *Select / Enter The Appointment Purpose* dropdown, 'click' in the *Select / Enter The Appointment Purpose* dropdown and enter

the business appointment's purpose. equineGenie will remember the purpose entered for future selection.

- ③ **Enter the business appointments date and time** in the *Date and Time* dropdown. The date and time can be entered by selecting the date from the calendar icon or by selecting **[New Date & Time]** from the *Date and Time* dropdown. If you select the calendar icon, your computer's current date and time will be entered. If the calendar icon is selected, to change the date and time, mouse over the displayed date and time and enter the correct date and or time. If **[New Date & Time]** is selected from the *Date and Time* dropdown, your computer's current date and time will be displayed in the *Date and Time* dropdown. If you need to change the displayed date and time, mouse over the displayed date and time and enter the correct date and or time. In either case, the date and time are entered in the format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy) and (hh:mm:ss).
- ④ **Select the appointment notification time** from the *Notification Time* dropdown.

Note 2: The selected notification time will generate an appointment reminder based on the appointment day and time entered in ③ plus the selected notification time.

- ⑤ **If you need to delete an appointment reminder**, it can be removed by displaying the appointment information and selecting the *Remove Appointment Reminder* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the appointment reminder.



After selecting **OK** on the **Delete Item** popup you need to select the **Enter** button ⑦.

Note 3: Read the '**RED**' Genie Note beside the *Remove Appointment Reminder* button. The '**RED**' Genie Note will explain what conditions must be met to remove the selected appointment reminder. Selecting remove will completely remove the selected appointment reminder from equineGenie.

- ⑥ **Enter** any comments or notes associated with the selected appointment information.
- ⑨ **Select enter** before leaving the *Contacts - Appointments* screen.
- ① **Selection** of the '*Current Year Appointments*' button will enable the current year appointments information to be viewed, exported and/or printed.
- ② **Selection** of the '*Date Specified Appointments*' button will enable the appointment information within a specified date range to be viewed, exported and/or printed.

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Calendar Contacts – Contact Manager

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There are no prerequisite setups required before a contact to be managed can be entered.

Think/Plan before entering a business contact management!

Important: *There is no limit to the number of business contact managements that can be entered, viewed and or printed in equinegenie.*

- ① **Select or enter the name of the contact** from the *Select / Enter A Contact* dropdown. If it is a previous contact entered that you want to recall, select the contact name from the *Select / Enter A Contact* dropdown. If a new contact to be managed is being entered, select **[New Contact]** from the *Select / Enter A Contact* dropdown, 'click' in the *Select / Enter A Contact* dropdown and enter the contact's name.

Note 1: A contact name can be any name you chose. **Suggestion:** Make the contact name descriptive enough so that it can be recalled and viewed by someone other than the person who entered it.

- ② **Select or enter the purpose of the contact** from the *Purpose Of Contact* dropdown. If it is a previous purpose entered that you want to recall, select the contact purpose from the *Purpose Of Contact* dropdown. If a new purpose is being entered, select **[New Purpose of Contact]** from the *Purpose Of Contact* dropdown, 'click' in the *Purpose Of Contact* dropdown and enter the contact's purpose. equineGenie will remember the purpose entered for future selection.

- ③ **Enter the contact date and time** in the *Contact Date & Time* dropdown. The date and time can be entered by selecting the date from the calendar icon or by selecting **[New Date & Time]** from the *Contact Date & Time* dropdown. If you select the calendar icon, your computer's current date and time will be entered. If the calendar icon is selected, to change the date and time, mouse over the displayed date and time and enter the correct date and or time. If **[New Date & Time]** is selected from the *Contact Date & Time* dropdown, your computer's current date and time will be displayed in the *Contact Date & Time* dropdown. If you need to change the displayed date and time, mouse over the displayed date and time and enter the correct date and or time. In either case, the date and time are entered in the format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy) and (hh:mm:ss).
- ④ **Enter the contact follow up date** in the *Contact Date* dropdown. The date can be entered by selecting the calendar icon or 'clicking' in the *Contact Date* dropdown and entering the follow up date. The date is entered in the format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy).
- ⑤ **Enter** the contact's address in the *Address* text box.
- Enter** the contact's city, state and zip code in the *City, State, Zip Code* text box.
- Enter** the contact's telephone number in the *Telephone* text box.
- Enter** the address contact's cell telephone number in the *Mobile Phone* text box.
- Enter** the contact's email address in the *email Address* text box.
- Enter** the contact's website address in the *Website Address (URL)* text box.
- ⑥ **A picture of the selected contact can be added** to equineGenie by selecting the Locate button to locate the picture file. Opening the picture file will automatically add it to equineGenie. Selecting the View button allows you to view the picture. Selecting the Clear button will remove the picture.

Note 2: A contact's picture needs to have a 3:2 aspect ratio. This means the picture needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2.

- ⑦ **Selecting** the Add To Address Book button will add the contact's address information to the equineGenie address book.

Note 3: The Address Book may allow for additional contact address information to be added. To add additional information to a contact's address entry to go to the address book and select the customer's name. *Path – Home: Calendar Contacts: Contacts: Address Book.*

- ⑧ **If you need to delete a contact's follow up date reminder**, it can be deleted by displaying the contact's reminder information and selecting the *Delete Follow Up Date Reminder* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the follow up date reminder.



After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button ⑩.

Note: Read the '**RED**' Genie Note beside the *Delete Follow Up Date Reminder* button. The '**RED**' Genie Note will explain what conditions must be met to delete the selected contact management reminder. Selecting remove will completely delete the selected contact date reminder from equineGenie.

- ⑨ **Enter** any comments or notes associated with the selected contact management entry information.
- ⑩ **Select** enter before leaving the *Contact – Contact Management* screen.
- ① **Selection** of the '*View Contacts*' button will enable all entered contact's contact information to be viewed, exported and/or printed.
- ② **Selection** of the '*View Follow Up Log (Date Specified)*' button will enable all entered contact's follow up information within a specified date range to be viewed, exported and/or printed.

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