Horse Information

Horse Insurance
Department Assignments
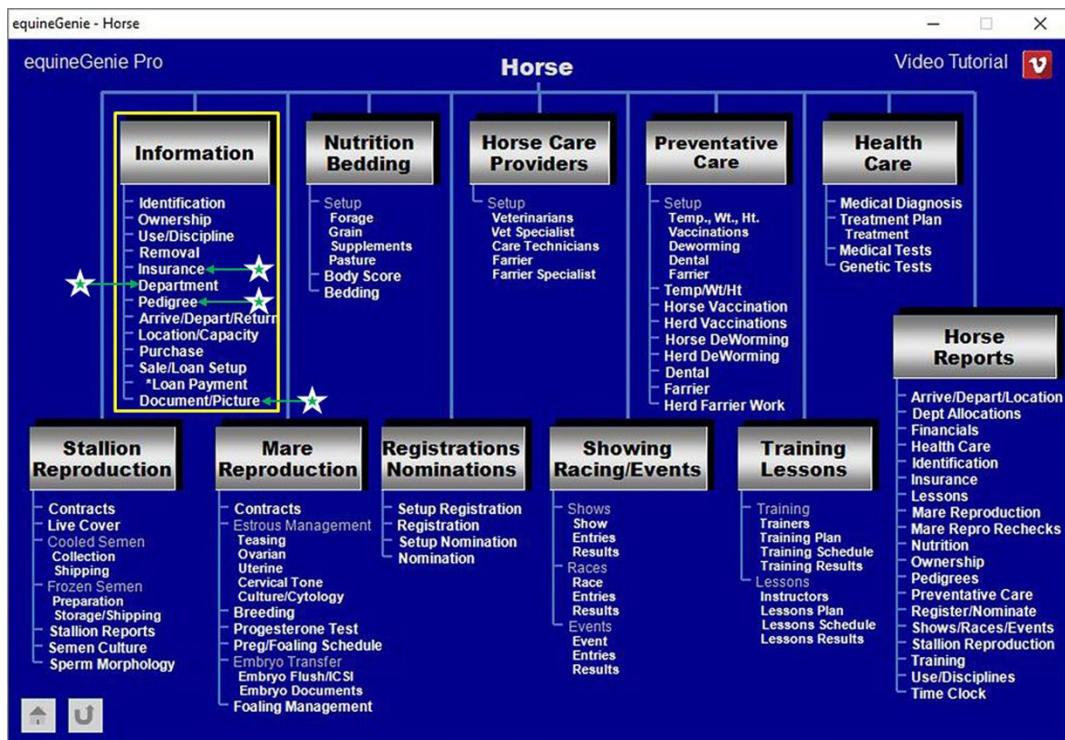**Horse Pedigree**
Documents, Pictures and Video Storage

Horse Information – Miscellaneous

Table of Contents

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

Horses Information – Insurance

Path: Home: Horses: Information: Insurance

There is a prerequisite required before a horse can have its insurance information entered. A horse must be entered in equineGenie, (Path - Horses: Information: Identification).

Think/Plan before you setup horses in equineGenie! Enter all horses that are already part of your business on the Horse Identification screen. If a horse's arrival date is important to the business, start entering the horse on the Arrival/Depart screen. (Path – Home: Horse Information: Arrive/Depart).

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

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen.

② **Select or enter the horse insurance provider** from the *Insurance Provider* dropdown. If an insurance provider had not been previously entered, select **[New Insurance Provider]** from the dropdown and enter the new insurance provider. equineGenie will remember the added insurance provider for future selection.

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.

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

Note 2: The insurance provider'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*.

④ **Select or enter the type of coverage** from the *Type Of Coverage* dropdown. If a type of coverage had not been previously entered, select **[New Insurance Coverage Type]** from the dropdown and enter the new insurance coverage type. equineGenie will remember the added type of insurance coverage for future selection.

Enter the insurance coverage date in the *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), selecting **[New Date]** from the *Date* dropdown. Selecting [New Date] will enter the computer's current date. The date can be changed by moussing over the computer generated date and entering a different date.

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

Enter the insurance coverage deductible in the *Deductible* box.

Select the insurance coverage renewal frequency from the *Renewal Frequency* dropdown.

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

If the insurance coverage will be renewed, select the *Renewal?* button changing it from a **Red No** to a **Green Yes**.

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

Note 3: If a business insurance coverage 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 insurance coverage costl transaction associated with type of insurance coverage. Completing a payment transaction is explained in the *Deposits and Payments training documents*.

If you need to add additional types of insurance coverage, select **Additional Coverage**. Selection of **Additional Coverage** will enter the information from your last type of coverage entry, the screen will be cleared. The Type Of Coverage dropdown will be active and ready for another type of insurance coverage to be selected or entered.

⑤ If the Insurance provider has not been previously setup as a vendor, selection of the **Green** 'Go To Insurance Provider Financial Account' button will display the *Financial – Vendor Supplier Account Setup* screen. The insurance provider contact information will be automatically transferred to the *Financial – Vendor Supplier Account Setup* screen.

⑥ **If you need to remove a selected insurance coverage**, it can be removed by displaying the entire coverage information and selecting the **Red** '*Remove Selected*

Insurance' button. When the button is selected a *Delete Item* popup will be displayed to make sure you want to delete the selected insurance coverage.
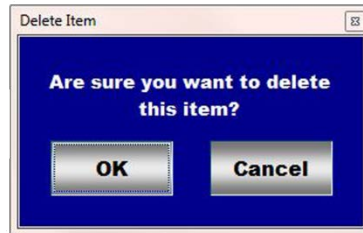
After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button⑧.

Note 4: The information in the horse color and markings dropdowns has been verified with the identified breed's registries. A marking's dropdowns allow for multiple selections. Therefore, only the color selection displays a color. The marking selections do not display a selection. The marking selections appear on the respective horse's information and health reports. To close a marking's dropdown, just click outside the box.

⑦ **Enter** any comments or notes associated with the insurance coverage information.

⑧ **Select** enter before leaving the *Horse Information – Insurance* screen.

❶ **Selection** of the '*Horse Insurance Current Year'* button will enable the selected horse's current year insurance information to be viewed, exported and/or printed.

❷ **Selection** of the '*Horse Insurance Previous Year'* button will enable the selected horse's previous year insurance information to be viewed, exported and/or printed.

❸ **Selection** of the '*Horse Insurance Renewal Schedule'* button will enable all horses insurance renewal schedule to be viewed, exported and/or printed.

❹ **Selection** of the '*All Horse Insurance'* button will enable all horses insurance information to be viewed, exported and/or printed.

Return to the Table of Content

Horses Information – Department Allocation

Path: Home: Horses: Information: Department Allocation

There are prerequisite setups required before a horse's department allocation can be entered. A horse must be entered in equineGenie, (Path - Horses: Information: Identification). The business departments must have been previously identified, (Path - Home: Departments - Projects).

Think/Plan before you setup horses in equineGenie! Enter all horses that are already part of your business on the Horse Identification screen. If a horse's arrival date is important to the business, start entering the horse on the Arrive/Depart screen. (Path – Home: Horse Information: Arrive/Depart).
Think/Plan before you setup departments in equineGenie!

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

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen.

② **Select a department** from the *Assign To A Department* dropdown.

Note 2: A department must have been previously entered in equineGenie to appear in the *Assign To A Department* dropdown. Departments are entered in equineGenie on the *Home – Departments - Projects* screen.

> **Select the horse's allocation percentage** from the *Allocation (%)* dropdown for the allocation assignment to the selected *Assign To A Department* dropdown. It the correct allocation percentage is not available, mouse over any selected percentage and enter the correct percentage.

If you need to assign the selected horse to additional departments, select **Another Department**. Selection of **Another Department** will enter the information from your last department allocation entry, the screen will be cleared. The *Assign To A Department* dropdown will be active and ready for another department allocation to be entered.

③ **Enter** any comments or notes associated with the selected horse's department allocation information.

④ **Select** enter before leaving the *Horse Information – Department Allocation* screen.

❶ **Selecting** the '*Go To Department Setup'* button will display Home – Departments – Projects screen where additional departments can be identified.

❷ **Selection** of the '*View Selected Horse Allocations'* button will enable the selected horse's department allocation information to be viewed, exported and/or printed.

❸ **Selection** of the '*View All Horse Allocations'* button will enable all horses department allocations to be viewed, exported and/or printed.

Horses Information – Pedigree

Path: Home: Horses: Information: Pedigree

There is a prerequisite setups required before a horse's pedigree can be entered. A horse must be entered in equineGenie, (Path - Horses: Information: Identification).

Think/Plan before you setup horses in equineGenie! Enter all horses that are already part of your business on the Horse Identification screen. If a horse's arrival date is important to the business, start entering the horse on the Arrival/Depart screen. (Path – Home: Horse Information: Arrive/Depart).

① **Select** the horse from the *Select Horse* dropdown.

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen.

Important: When the horse was initially entered on the *Horse Information – Identification* screen, if the it's sire and dam were identified they will be displayed on the Horse Information – Pedigree screen when a horse is selected in the *Select Horse* dropdown.

② **Select or enter** the sire and dam of each horse in the selected horse's pedigree. If a horse's pedigree was previously entered it will be selectable and does not need to be reentered. If a sire or dam needs to be entered, select **[New Item]** and enter the new sire or dam. equineGenie will remember the sire or dam entered. The sire or dam

entered will be available for selection if need in another pedigree without being reentered.

Note 2: If a sire or dams pedigree was previously entered, when the sire of dam is selected the remaining pedigree will be automatically displayed.

③ **A pedigree picture of a horse can be added** to equineGenie by selecting the Locate button to locate the horse's picture file. Selecting open will automatically add it to equineGenie. Selecting the View button allows you to view the horse's picture. Selecting the Clear button will remove the horse's picture from equineGenie. The horse's picture will appear on the horse's predigree.

Note 3: A horse's picture can be a landscape or portrait format, but needs to have a 3:2 or 2:3, aspect ratio. This means the horse's picture selected for equineGenie needs to be a 6 x 4, 4x 6 or any other size as long as the aspect ratio is 3:2 or 2:3. This is a requirement of Crystal Reports, the report writer used by equineGenie. If a picture does not have the required 3:2 aspect ratio it will appear distorted on reports using the horse's picture. There are many free photo editing software that can be used to edit pictures.

Important: A good pedigree picture is important because a horse's pedigree is a good marketing document.

④ **Enter** any comments or notes associated with the selected horse. Pedigree comments will appear on the selected horse's pedigree. Pedigree comments are a good opportunity to promote the selected horse's accomplishments.

⑤ **Select** enter before leaving the *Horse Information – Pedigree* screen.

❶ **Selection** of the 'View *Pedigree (Landscape Picture)' button will* enable the selected horse's pedigree to be viewed, exported or printed with a landscape picture of the horse.

❷ **Selection** of the 'View *Pedigree (Portrait Picture)' button will* enable the selected horse's pedigree to be viewed, exported or printed with a portrait picture of the horse.

Horses Information – Documents / Videos / Pictures

Path: Home: Horses: Information: Document/Picture

There is a prerequisite setup required before a horse's documents, pictures or videos can be stored in equineGenie. A horse must be entered in equineGenie, (Horses: Information: Identification).

Think/Plan before you setup horses in equineGenie! Enter all horses that are already part of your business on the Horse Identification screen. If a horse's arrival date is important to the business, start entering the horse on the Arrive/Depart screen. (Path – Home: Horse Information: Arrive/Depart).

① **Select** the horse from the *Select Horse* dropdown.

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen.

② **To enter the selected horse's document, picture or video:**

Enter the storage date in the *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). Entering a date by selecting **[New Date]** from the *Date* dropdown will enter the computer's current date. The date can be changed by moussing over the date and changing it. equineGenie will remember the added date for recall.

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

To recall a previously stored item, select the item's identity from the *Identify Document/Picture* 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 with the same date, select the orange **Another Doc / Pict / Video Same Date**. Selecting **Another Doc / Pict / Video Same Date** clears the previous item's storage information enabling a new item to be entered.

③ **If you need to remove a selected item**, it can be removed by displaying the entire item's information and selecting the **Red** '*Remove Document, Picture or Video*' button. When the button is selected a *Delete Item* popup will be displayed to make sure you want to delete the selected item.

After selecting **OK** on the *Delete Item* popup you need to select the **Enter** button⑤

④ **Enter** any comments or notes associated with storing an item in the comment box.

⑤ **Select** enter before leaving the *Horse Information – Document / Picture / Videos* screen.

❶ **Selection** of the 'Pictures / *Documents / Videos List'* will enable a list of all stored items to be viewed, exported or printed.