



Customer Client

Contact Information

Removal

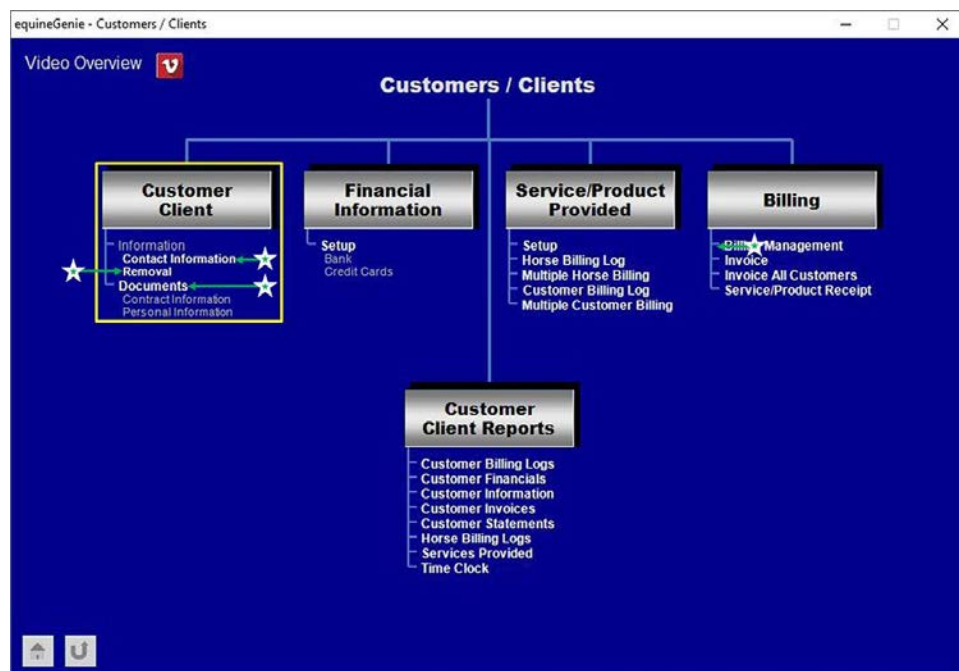
Documentation

Customer / Client - Customer Information

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Customer / Client – Information

Path: Home: Customer Client: Customer Client: Contact Information

There are no prerequisite setups.

Think/Plan about how you want to measure and manage your customer / clients before you setup their information! equineGenie enables you to bill business charges to customer/clients or their parents or guardians, or another person if the customer is under age and not responsible for any billed charges.

- ① To add a customer/client, select [New Customer / Client] from the *Enter / Select A Customer/Client* dropdown, click in the *Enter/Select A Customer/Client* dropdown box and enter the Customer/Client's name.

Note 1: ***The name format you used when entering a customer's name is very important. The customer's name you enter is used for the billing name on an invoice.*** Once a customer has been entered it will be displayed in the *Enter / Select A Customer/Client* dropdown list. Selecting a Customer/Client's name will recall its contact information. A customers name can be modified and any associated information can be changed for the selected customer/client after all the customer/client information has been displayed.

- ② Entering a customer's last name and first name is **optional**. If the customer name has been entered in the First Name, Last Name format, the Last Name and First Name can be entered in the respective *Enter Last Name* and *Enter First Name* dropdowns. A cross reference report is available to list customers sorted by their Last names.

- ③ If a customer's correspondence needs to be sent to another person other than the customer, the correspondence recipient can be added to the *Alternative Correspondence Recipient* text box.

Note 2: For example, the alternate correspondence recipient would be identified if a lesson student is under age and an invoice or other business charges need to be sent to the student's parents, guardian or another person who is responsible for the student's financial obligations. For example; if a parent or guardian, or someone else, is responsible for paying a customer/client's business charges the entry could be, % a **Parent or Guardian or other Name**.

- ④ **Enter** a customer/client's ranch name or business name in the *Ranch or Business Name* text box. (Optional)

Note 3: If a ranch name is entered it will appear on a customer's invoice with their address information.

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

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

Enter the customer's primary telephone number in the *Primary Phone* text box.

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

Enter the customer's cell telephone number in the *Cell Phone* text box.

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

Important: If the customer is not responsible for any business charges the address in the contact information should be the address, phone and fax information of the parent or guardian, or the person responsible to paying any business charges.

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

Important: If the customer is not responsible for any business charges the email address in the *email Address* text box should be the email address of the parent or guardian, or the person responsible to paying any business charges. This is because a customer's email address is used to send a customer an invoice from within equineGenie directly from the Customer/Client Invoice screen. Therefore, it is very important that the customer's email address is always correct and current so that if an invoice is emailed directly from equineGenie it goes to the person responsible for paying any business charges.

- ⑥ **Enter** the gender of the customer/client being entered in the *Gender* text box. (Optional)

⑦ **Enter** the birth date of the customer/client being entered in the *Birth Date* text box. **(Optional)**

⑧ **Selecting** the Add To Address Book button will add the customer/client contact information to the equineGenie address book.

Note 4: The Address Book may allow for additional customer/client information to be added. To add additional information to a customer's address entry to go to the address book and select the customer's name. *Path – Home: Calendar Contacts: Contacts: Address Book.*

⑨ **A picture of a customer/client can be added** to equineGenie by selecting the Locate button to locate the customer/client's picture file. Opening the customer/client's picture file will automatically add it to equineGenie. Selecting the View button allows you to view the customer/client's picture. Selecting the Clear button will remove the customer/client's picture. The customer/client's picture will appear on selected reports unique to that customer/client.

Note 5: A customer/client'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.

⑩ **Enter** any comments or notes associated with the selected customer client contact information.

① **If a customer/client's financial information has not been previously setup** in equineGenie **Select the Green 'Go To Customer Financial Account' button.** Selection of this button will enter the customer/client's contact information and display the *Financial – Customer / Client Account Setup* screen. *Path – Home: Financials: Financial Business Setup: Customer Setup. (See the Genie Academy, Financial Setup – Accounts document).*

Note 6: If the *Go To Customer Financial Account* button is selected the customer's/client's contact information will be entered and will be displayed on the *Financial – Customer / Client Setup* screen without having to be reentered.

② **Select** enter before leaving the *Customer/Client – Information* screen.

Note 7: If a customer/client's financial information has not been setup in equineGenie **DO NOT select the Enter button.** See ① and select the *Go To Customer Financial Account* button.

③ **Selection** of a *Customer/Client Information* button will enable the selected customer's contact information to be viewed, exported and/or printed.

④ **Selection** of the *All Customer/Client Information* button will enable all customer contact information to be viewed, exported, and/or printed.

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Customer / Client – Removal

Path: Home: Customer Client: Customer Client: Removal

There is a prerequisite setup. At least one customer needs to be setup before a customer can be removed.

Think/Plan before you remove a customer/client! It is highly recommended that you DO NOT REMOVE a customer/client that has incurred any financial transactions in equineGenie. If a customer/client is removed they can be returned. Your time is better spent keeping a customer/client if possible. The rule of thumb is that it cost 10 times more to get a new customer/client then it does to keep the one you already have – keep them or get them back!

equineGenie Customer / Client - Removal

Remove Customer/Clients

Select Customer/Client ①

Customer Removed? ②

Reason For Removal ③

Removal Date ④

A customer or owner is removed by selecting the No button changing it to Yes. A customer or owner is never removed from equineGenie, they are made inactive in all associated dropdowns except on this screen. That way a customer or owner can be brought back if necessary.

Removed Customer Report ①

Removed Comments

⑤

Enter ⑥ Video Tutorial

Popup And Red Flag
equineGenie
Notes

① **Select** the customer/client to be removed. **Caution:** Think about this!

Note 1: All customers ever entered in equineGenie will appear in the *Select Customer/Client* dropdown. This allows customers to be returned if any customer historical information is needed. A customer is never removed from equineGenie, they are only made inactive in all associated customer dropdowns except on the *Customer/Client - Removal* screen.

② **To Remove a selected customer/client select** the *Customer Removed?* button. Selecting the button will change it from a **Red No** to a **Green Yes**. A removed customer will be made inactive in all other associated customer/client dropdowns.

To Return a removed customer/client select the customer to be returned, then select the *Customer Remove?* button changing it from a **Green Yes** to a

Red No. A removed customer will be made active in all associated customer/client dropdowns. All previously entered customer/client records will be available again for viewing, printing and/or exporting.

- ③ When the *Customer Removal?* Button is changed to a **Green Yes**, the *Reason For Removal* dropdown will become active. **Select or Enter** the reason for removing a customer/client in the *Reason For Removal* dropdown.

Note: Removal reasons added are saved in equineGenie and are displayed in the *Reason For Removal* dropdown list for future selection when another customer/client is being removed for the same reason.

- ④ **Enter** the date the customer was removed in the *Removal Date* box. A date can be entered by selecting the date from the calendar icon or 'clicking' in the *Removal Date* box and entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).
- ⑤ **Enter** any comments or notes associated with the selected customer client removal.
- ⑥ **Select** enter before leaving the *Customer / Client – Removal* screen.
- ① **Selection** of the *Removed Customer Report* button will enable all the removed customers to be viewed, exported, and/or printed.

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Customer / Client – Documents

Path: Home: Customer Client: Customer Client: Documents

There is a prerequisite setup. At least one customer needs to be setup before a customer document can be stored.

Think/Plan before you store a customer / client documents. All document file formats can be stored in equineGenie. This includes videos.

The Parent / Guardian information should be entered if a customer / client is under age or not responsible for any business billed charges.

- ① **Select** the customer/client from the *Select Customer* dropdown whose documents are being stored.
- ② **Enter** the date the document is being added in the *Document Date* dropdown. A date can be entered by selecting the date from the calendar icon or by selecting **[New Date]** from the *Document Date* dropdown. Selecting **[New Date]** will enter your computer's current date. You can change the date by mousing over the date and entering the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).
- ③ **Identify** the document that is being stored by assigning it an associative name in the *Identify Document* dropdown.

A document can be added to equineGenie for the selected customer / client by selecting the Locate button to locate the document file. Opening the document file will automatically add it to equineGenie. Selecting the View button allows you to view the document. Selecting the Clear button will remove the document. **Multiple documents can be added** on the same date

by selecting the **Another Customer Document Same Date**. A document is tracked by both the date it is entered and the identification it is assigned.

- ④ **Enter** the parent or guardian information if a customer/client is under age or not responsible for any business charges.

Enter the parent or guardian name in the *Parent / Guardian* Name box.

Enter the parent or guardian telephone in the *Telephone* box.

If there is another parent or guardian, enter their name in the second Parent / Guardian Name box.

If there is another parent or guardian, enter their telephone in the *Telephone* box.

Enter the customer's date of birth in the Birth Date box. Enter the date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

Enter the customer's gender in the *Gender* box.

- ⑤ **Enter** any comments or notes associated with the selected customer client document information.
- ⑥ **Select** enter before leaving the *Customer / Client – Documents* screen.
- ① **Selection** of a *Customer Document List* button will enable the selected customer's document list to be viewed, exported and/or printed.

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