

The System Requirements The Program Entering Information Reports Setup Sequence

The System

Table of Content

System Requirements
System Font
Display Text Size4
Display Size
The Program
Program Exit6
Program Symbols7
Home Symbol
Return Symbol7
Genie Notes
White / Red Genie Notes 8
Dates
Address Book 10
Program Warnings11
Exiting A Screen 11
Delete An Image 12
Deleting An Item
Remove An Entry14
Entering Information 15
Line Item Dropdown
Check Box Dropdown
[New 'Entry'] Dropdown
Auto Learn Dropdown
Text Box
Enter Information
Database Entries
Reports 22
Setup Sequence
Mouse 0ver and Clickon a content subject to go to that subject

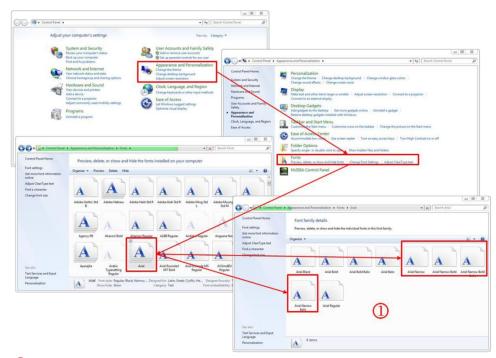
System Requirements

The equineGenie system was developed exclusively to help manage any type of horse business. It uses intuitive 'point and click' screens, 'dropdown menus' and 'selectable selections from knowledgebase lists'. It is designed for minimal data entry. It is user customizable. The user can tailor equineGenie to best help them measure and manage their horse business. equineGenie continually analyzes the user's data and generates intelligent reports, some of which make management suggestions. equineGenie further uses embedded artificial intelligence and expert knowledge to optimize a business's operations and financials.

You do not need to be an accountant, business guru, or a computer whiz to use equineGenie! equineGenie will assist you, teach you and support you!

System Font

The text displayed in equineGenie dropdowns and text boxes require the **Arial Narrow** font. The **Arial Narrow** font must be installed in the font section of your computer's windows operating system control panel. *Path: Control Panel: Appearance and Personalization: Fonts: Preview, deletes, show and hide fonts*



If the text displayed on equineGenie screens is too large, or doesn't fit in the menu dropdowns, you probably do not have the Ariel Narrow font on your computer or your display text size is set too large.

Note: The **Ariel Narrow** font can be obtained from the equineGenie support team by emailing the Genie team: <u>info@genieatwork.com</u>.

Display Text Size

If the **Ariel Narrow** font is installed and the equineGenie screen text is still too large, the system **Display Text Size** is set at too large a percentage. It should be set to **100%** or the smallest setting depending on the version of the windows operating system you are using. The system Display Text Size is set in the display section of your computer's windows operating system control panel. *Path: Control Panel: Appearance and Personalization: Display: Make text and other items larger or smaller*

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See also Personalization Devices and Printers	⊙ Larger - 150%]		

2 If the text displayed on the equineGenie screens is too large and you have the **Ariel Narrow** fonts installed, you probably do not have your display text size set correctly.

Note: It should be set to 100%, or the smallest selectable setting.

Display Size

The size and resolution of the equineGenie screen is your choice. If you decrease your computer's display resolution, equineGenie's displayed size increases. If you increase your computer's display resolution, equineGenie's displayed size decreases. Path: Control Panel: Appearance and Personalization: Fonts: Preview, deletes, show and hide fonts

) 🖓 · Control Fand •	• 49 Search Cantral Planel		
Adjust your computer's settings	Vew by: Category + User Accounts and Family Safety @Add or remove user accounts @Edia generatic centrols for any user		0 8
In card regarding Network and the regarding of the regar	Appeared and Personalizable Count Part Hour Count Part Hour Count Part Hour Search Access Technics support uniting Technics support uniting T	Unixtop Googets and a state of the state of	
This is currently your main display. Connect to a projector (or press the 2 key and top P) Malar tool and other larms larger or smaller What display settings theologic toknowed	Advanced settings		
where express settings should I choose?	CK Cencel Apply		

(3) If the equineGenie screen is too small or too large the screen size can be adjusted by changing your display resolution.

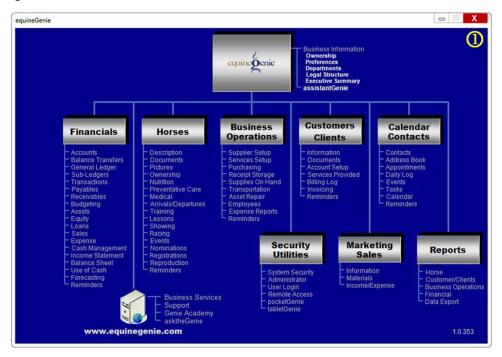
Note: Right 'clicking' your mouse on your home screen will display a box that contains a screen resolution selection that if selected, will display step ③ above without having to display your system's control panel.

The Program

The equineGenie program is designed for 'ease of use'. This section explains the selections and symbols used in equineGenie, and equineGenie's response resulting from a selection.

Program Exit

The equinegenie program always starts on its home screen. You should always exit equineGenie from its home screen. To exit equineGenie, you select the **Red X** in the upper right corner of the home screen.



Always exit equineGenie by displaying the home screen and selecting the Red X. This will prevent losing any information you previously entered on any equineGenie screen.

Program Symbols

The equinegenie program makes it easy to return to the last screen in which you entered information or to return to the Home screen to exit equineGenie. Both the Home and Return symbols are located in the lower left corner on any equineGenie screen except the Home screen.

Home Symbol

The Home symbol is represented by a house.

Return Symbol

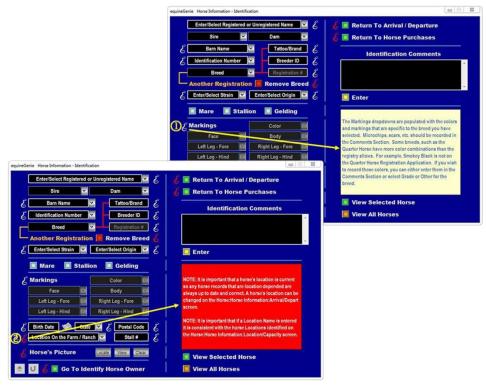
The Return symbol is represented by a U-turn arrow.

- Selection of the house symbol in a screen's lower left corner will display equineGenie's Home screen.
- 2 Selection of the U-turn symbol in the lower left corner will display the previous equineGenie screen.

Genie Notes

The equinegenie program provides online assistance using Genie Notes. White Genie Notes provide general information about an adjacent activity or entry. Red Genie Notes provide a caution or warning about an adjacent activity or entry.

White / Red Genie Notes



- Selection of a White Genie Note displays information about the item that is adjacent to it.
- 2 Selection of a Red Genie Note displays a caution or warning about the item that is adjacent to it.

Dates

A Date can be entered in equineGenie by either entering the Date in a date text box or selecting a Date from a popup calendar. Entering a date in a date text box requires the date to be entered in a day/month/year or a month/day/year format depending on the Date format you have set in your computer's window's operating system date format, e.g., 4/6/2012 or 6/4/2012. Entering a date by selecting it from a popup calendar requires you to click on the Calendar Icon and then select the desired date.

Full set of shoes ☑ ∅ Popup \$135.00 𝔅 Each 𝔅 And 1 𝔅 \$135.00 𝔅 Red Flag		-	11	6/20	15		~
Full set shoes 4000 - 4990 Income 40500 - Furrier Income € 6 6 6 6 6 6 6 6 6 6	15 22 29	16 23 30	17 24 1	18 25 2) Toda	19 29 3 4/6/20	20 27 4 012	2
	Sun 25 8	Mon 26 2 9	Tue 27 0 10	Wed 28	Thu 29 5 12	Fri 30 6 13	Sa 3 14

- A date can be entered or a previous Date can be selected from the date dropdown.
- 2 Selecting the Calendar Icon will display a calendar with the current year, month and day.
- 3 A different month can be displayed by 'clicking' on the calendar's month which will display the twelve months of the displayed year.

•	2012 (3)				
	Jan	Feb	Mar	Apr	
	May	Jun	Jul	Aug	
	Sep	Oct	Nov	Dec	
		Т	oday: 4/6/2	012	

A different year can be displayed by 'clicking' on the calendar's year which will display the current decade in which the current year is included.

4		2010	- 2019 (4)	۲
	2009	2010	2011	2012	
	2013	2014	2015	2016	
	2017	2018	2019	2020	
		— т	oday: 4/6/2	012	

Address Book

On many screens, throughout equineGenie, you add address information for customers, vendors, employees, horse care providers, etc. This address information can be added to the system Address Book by selecting the 'Add To Address Book' button. Selecting the button will add the respective contact and the contact's information to your equineGenie Address Book.

	equineGenie Contacts - Address Book	
equineGenie Business Operations - Item Supplied Setup	E Address Book	Address Book Comments
E Item Supplied Setup	Northern Colorado Feeder's Supply ☑ Ĕ Ê ■ Remove Selected Address	Purina - Omolene 200, 300 Grass Hay - Elk Mountain, WY Alfalfa - Local
Alfalfa V	Alternate Correspondence Recipient	
Horse Forage	Ranch - Business / Parent - Guardian Picture Viewer	
Northern Colorado Feeder's Supply	307 Linden Street	140
307 Linden Street	Pt. Collins, CO 80524 970.482.7303 Emergency Phone	
Ft. Collins, CO 80524	Mobile Phone Fax Number	
970.482.7303 info@noorleederssupply.com	info@nocofeederssupply.com	
www.nocofeed.ssupply.com	www.nocofeederssupply.com	No. Colorado Feedera Supply
🕺 Units Locked? 📄 Yes	Feed Store, Hay and Grain 🗾 💪	
E 100 2 pound	Address Picture Locate View Clear	
Primary Supplier/Lead Time 🛛 🖉 🖉 🦉	Address Book By Business Connection	And and the second s
Add To Address Book	Address Book By Name	OK
Same Item Another Supplier	🎓 🗾 🧮 Address Book List	
🔏 📕 Remove Selected Item (Caution!)	View Supplier's Supplies	
👚 🕕 🧵 Go To Supplier Financial Account	View Suppliers Contact Information	
CONTRACTOR OF A DESCRIPTION OF A DESCRIP		

When the 'Add To Address Book' button is selected the address information on the initiating screen will be added to the Address Book. In some cases the Address Book can accept more address information than is provided by the initiating screen. To add additional information to a contact's address, go to the Address Book screen to complete the information.

Program Warnings

When there is a risk of losing information entered on the screen in which you are working, but not saved, or deleting an image or a reminder, equineGenie will issue a warning.

Exiting A Screen

A system warning is displayed if you attempt to Exit A Screen without saving your information in your equinegenie database.

equineGenie Horse Nutrition - Forage Setup		
Forage Setup Cinnamon Lace VLA 💌 Forage	Forage Comments	
11:00:00 PM ♥ € 2 € pound ♥ € € Remove Selected Forage Type Another Feeding Time, Same Forage Another Forage Type, Same Horse	Enter Popup And Red Flag cquinc Oenic Notes Popup Content	. If you hout bu will ges. nt to
 Horse Nutrition Setup Horse's Nutrition Stall Chart 	YTD Forage Cost Go To Grain Setup	

If the unsaved changes warning appears you would select Cancel and select the initiating screens enter button. Selecting OK will exit the screen without saving your information.

Delete An Image

A system warning is displayed if you elect to Delete An Image.



If you select delete an image equineGenie will display a warning to make sure you want to delete the image in question. Selecting Cancel will not delete the image. Selecting OK will delete the image.

Deleting An Item

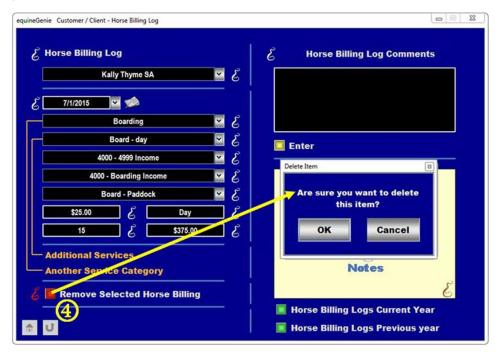
- 0 X equineGenie Horse Preventative Care - Vaccination setup & Vaccinations Setup ${\mathcal E}$ Vaccination Setup Comments * Cinnamon Candy V ~ 8 Encephalomyelitis (EEE/WEE) - 8 Annually 4 Weeks Before Foaling **Start Vaccination** May < Enter Delete Item Vaccinated Since the Start Month or within Ea the Selected Frquency Interval? ar Are sure you want to delete initial this item? th sc gi ar br Number Of Times 1 ctup only ally oĸ Cancel ant Another Vaccine Type, Same Horse 8 prepartum. Unvaccinated norses are given a 2 dose **Delete Vaccination Reminder** series. Some areas may require VEE, the Venezuelan variety. **All vaccinations programs should be 🕹 🔳 Horse Vaccination Schedule developed in consultation with a licensed Veterinarian. 🕹 📕 Horses Vaccination Schedule 🧧 Go To Temp., Wt., Ht. Setup 📕 Go To Deworming Setup

A system warning is displayed if you elect to Delete an item.

③ If you select delete an item equineGenie will display a warning to make sure you want to delete the item in question. Selecting Cancel will not delete the item. Selecting OK will delete the item.

Remove An Entry

On several screen you can remove a complete entry. You select the '**RED**' button beside an entry that you want to remove. A system warning is displayed if you elect to Remove An Entry.



If you select Remove An Entry equineGenie will display a warning to make sure you want to delete the entry displayed. Selecting Cancel will not delete the entry. Selecting OK will delete the entry.

Note: Always display and read the '**RED**' Genie Note beside a Remove button. The '**RED**' Genie Note will explain what conditions must be met to remove an entry. Removing an entry will completely remove the entry from equineGenie.

Entering Information

There are four types of dropdowns in the equineGenie program. You need to be aware of the different types so that an entry or selection is correctly executed.

Line Item Dropdown

The Line Item dropdown displays information in a line format. More than one line can be displayed, but only one line can be selected at a time. The line selection is displayed in the dropdown box after selection.

GL / Chart Of Account Setup	General Ledger Setup Comments
4000 - 4999 Income (3) 🛛 🖉 🕹	
1000 - 1499 Current Assets 1500 - 1899 Fixed Assets 1900 - 1999 Other Assets 2000 - 2699 Current Liabilities 2700 - 2999 Long Term Liabilities 3000 - 3999 Equity 000 - 4999 Income	Enter
Soloc – 9999 Expenses	
Select A Primary Account Category	
Select A Primary Account	
Subaccount Number 🔤 🕹 🥇	Popup
Enter A Subaccount	And Red Flag
Another Subaccount Same Primary Account	8
Another Primary Account, Same Category	equine Genie
Another Primary Account Category	5
Remove Selected Subaccount (Caution!)	6

Selecting a Line Item Dropdown will display the line items available for selection.

Note: A maximum of five items are displayed in a dropdown. If more than five items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining items.

- 2 Clicking on a Line Item will highlight it in the dropdown list and display the selected line item in the dropdown box.
- 3 The selected Line Item will be displayed the Line Item Dropdown box after the dropdown closes.

Check Box Dropdown

The Check Box dropdown displays information in a check box format. More than one check box can be displayed and one or multiple check boxes can be selected at a time. Since multiple check boxes can be selected, no selections are displayed in the dropdown box after selections are made.



 Selecting a Check Box Dropdown will display the check box items available for selection.

Note: A maximum of five check boxes are displayed in a dropdown. If more than five check boxes are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining check boxes.

- ⁽²⁾ Clicking on a Check Box will add a check mark to the box indicating the check box has been selected. Multiple check boxes can be checked.
- 3 No selected check boxes will be displayed the Check Box dropdown box after the dropdown closes.

Note: Because multiple check boxes can be selected, no selections are displayed.

[New 'Entry'] Dropdown

The [New 'Entry'] Dropdown enables you to add an item to a dropdown list, e.g., a new item, a new horse, a new vehicle, etc. To add a new item to a [New 'Entry'] dropdown list you select [New 'Entry'] from the dropdown list and then click in the [New 'Entry'] dropdown box. This allows you to enter an associated new entry to the dropdown list. After a new entry is entered it is auto learned by equineGenie and added to the dropdown list for future display and selection.

equineGenie Horse Information - Identification	
Enter/Select Registered or Unregistered Name & & & & & & & & & & & & & & & & & & &	Return To Arrival / Departure Return To Horse Purchases
Cinnamon Lace VLA Gazals Glory VLA Breed Another Registration Remove Breed	Identification Comments
Enter/Select Strain ▼ Enter/Select Origin ▼ E Mare Stallion Gelding Markings	Enter
Face Body Left Leg - Fore Right Leg - Fore Left Leg - Hind Right Leg - Hind	Popup And Red Flag equine Denic
E Birth Date State E Postal Code E Location On the Farm / Ranch Stall # E Horse's Picture Locate View Clear	Notes
🔶 🗾 🕹 🔳 Go To Identify Horse Owner	View Selected Horse

① Selecting a [New 'Entry'] Dropdown will display the [New 'Entry'] line item and any other available selections.

Note: A maximum of five line items are displayed in a dropdown. If more than five line items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining line items.

- ⁽²⁾ Clicking on the [New 'Entry'] line item and then clicking in the [New 'Entry'] dropdown box will enable a new associated line item to be entered.
- 3 A new entry is auto learned by equineGenie and when saved, will be added to the dropdown list and displayed in the [New 'Entry'] dropdown for future selection.

Auto Learn Dropdown

The Auto Learn Dropdown enables you to add a new associated line item by clicking in the dropdown box and entering the new line item. Line items previously entered in an Auto Learn Dropdown are displayed when the Auto Learn Dropdown is selected. equineGenie auto-learns the new line item entry and makes it available to the dropdown list for future selection.

uineGenie Horse Information - Identification Enter/Select Registered or Unregistered Name	🔲 🛛 🖉 Return To Arrival / Departure
Sire Dam 2	Return To Horse Purchases
E Barn Name Tattoo/Brand E E Identification Number ► Breeder ID E	Identification Comments
Breed Registration #	A
← Another Registration F Remove Breed & & Enter/Select Strain ♥ Enter/Select Origin ♥ &	– Enter
Mare Stallion Gelding	
E Markings Color	Рорир
Face Body Left Leg - Fore Right Leg - Fore	And Red Flag
Left Leg - Hind Right Leg - Hind	equinegenie
E Birth Date 🕬 State 💟 E Postal Code E (2) Location On the Farm / Ranch 💟 Stall # E	Notes
Main Barn Stallion Barn North Pasture	View Selected Horse
South Pasture Horse Owner	View All Horses

Selecting an Auto Learn Dropdown will display the line items previously entered.

Note: A maximum of five line items are displayed in a dropdown. If more than five line items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining line items.

② A new entry can be added and is auto learned by equineGenie. When an auto learned entry is saved it will be displayed in the Auto Learn Dropdown for future selection.

Text Box

A Text Box enables you to enter information that is unique to the associated entry you adding to equineGenie. To add an entry in a Text Box you just click in the Text Box and enter the information. equineGenie adds the text box entry to the screens database tables when the screen is saved. Recalling a saved screen will display the screen's information which includes any text box entries. Text boxes are easily recognized because they do not have a dropdown scroll bar.

quineGenie Financial - Customer / Client Account Setup	
\mathcal{E} Customer / Client Accounts	Charge Account Comments
Billy Jones	Pays for his daughter Sara Jones.
Jones Ranch	
3456 Some Lane	
Someplace, ST 99999	
99.999.9999	🔲 Enter
bjones@gmail.com	
Website URL	
Add To Address Book	Рорир
	And
126	Red Flag لا
\$2,500.00 🖉 net 10 👻 🥉	equinegenie
\mathcal{E} 1.5% and / or \$25.00 \mathcal{E}	Notes
50.00 — Initial Setup Only	E
	Customer / Client Accounts
🏫 🔰 🔳 Select Customer / Client Account	Customer / Client Account Numbers

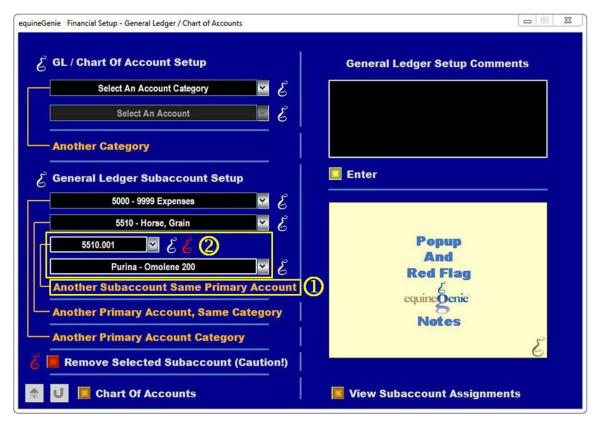
Selecting a specific screen will display the screen's data entry formats. Displaying a specific screen will display the screen's information including any Text Box entries. Text boxes are easily recognized because they do not have a dropdown scroll bar.

Note: To change a Text Box entry you 'mouse' over a previous Text Box entry and make any necessary changes. In this example if you needed to change the customer's address you would mouse over the address that needs changing and make the necessary changes. When the screen is resaved any customer address changes will be updated.

Selecting the 'Add To Address' button after any changes are made will update the customer's address information in your equineGenie address book.

Enter Information

equineGenie enables the user to enter information without having to reselect or reenter any previous information. For example: on the example screen below, by selecting Another Subaccount Same Primary Account the previous information is entered in the system and the Primary Account Category and Primary Account <u>do not</u> have to be reelected to enter additional Subaccount information for the same Account Category and Account.



- ① Selecting Another Subaccount Same Primary Account will clear the subaccount number and subaccount name previously entered.
- 2 A new subaccount number and subaccount name can be entered without having to identify the Expense Category and Expense Account again.

Note: This capability is on many equineGenie screens, but may have different wording. However, the capability is always be identified by the '**ORANGE**' color.

Database Entries

equineGenie's database is a relational hierarchal database structure. Get <u>organized</u> and <u>Think</u> about what you want to accomplish before you enter a screen's information and select the 'Enter' button. Selection of the Enter Button enters the screen's information into your equineGenie database and creates a record in an associated database table, and sometimes several database tables.

You can change the information in a database record by recalling a screen and changing its information. However, in a rare case where the information is critical financial information a database record can only be removed by a GenieCo representative. This is to prevent 'creative' accounting without the business owner's knowledge.

There are several screens in equineGenie where an entire screens information can be removed as explained in the '<u>Remove An Entry</u>' section of this document. However, removing a financial or customer database record is not encouraged.

Reports

equineGenie has over 500 reports available that can be exported as a PDF, Excel spreadsheet or printed. Many reports are intelligent reports and contain suggestions on how to improve your business. A Report may have Multiple Pages. When you display a report it can be magnified. Existing reports cannot be changed, but a new report can be added free of charge if the report's information is captured in equineGenie and equineGenie owns the completed report and can include it in future equineGenie system releases.

00	3	4
Main Report	▶ № 1	/2 ∰ ₩ •
Valentine	Arabia	ns
Valentine	Arabia	
Valentine	Arabia	ns Horse Id Breed - Registration #

① A Report can be exported as a PDF (*pdf), a Microsoft excel (*xls) spreadsheet or a Microsoft word (*.doc) document. When a Report is exported it is given a name and its destination is identified.

🕽 💭 🗢 🔝 Desktop 🕨	🔹 😽 Search D	esktop	P
Organize • New folder		85 -	0
★ Favorites ▼ Destop ▶ Downloads ▶ Dropbox ♥ Destropex ♥ Udeos	Libraries System Folder System Folder System Folder System Folder Network System Folder		
File name: Chart of Acc Save as type: PDF (".pdf)	ounts	Cance	

Note: Do not export a report in the Crystal Reports (*rpt) format. If you want to reconfigure or change a report's colors, export it in the (*doc) format and open it as a

word document and make the desired changes or open it in your favorite design software.

- ② A report can be printed on your system printer by selecting the printer symbol.
- 3 Many reports have multiple pages. You can view different pages by using the multiple page scroll.
- ④ A report can be magnified by selecting the magnification dropdown and identifying the desired magnification level.

Setup Sequence

The recommended setup sequence is;

- 1. Business Information Path: Home Screen
 - a. Owner(s) Information,
 - b. Owner Preferences Note: Measurement system used, currency symbol and Asset Capitalization Value.
 - c. Business Legal Structure
 - d. Business Departments (optional)
- 2. Financial Business Setup Path: Financials: Financial Business Setup
 - a. Chart of Accounts and Subaccounts
 - b. Vendor Accounts (Vendors that do not supply purchased items; e.g., insurance agents, Utility Companies, etc.)
 - c. Customer Accounts Note: You cannot invoice with a customer account number and payment terms identified.
 - d. Checking Account(s)
 - e. Credit Card(s)

3. Horses – Path: Horses: Information

- a. Identification
- b. Ownership Note: A customer's horse ownership must be identified before a customer can be invoiced for horse related charges; e.g., Board, Farrier, Vaccinations, etc.)
- c. Use/Discipline
- d. Nutrition
- e. Care Providers
- f. Preventative Care
- 4. Business Operations Path: Business Operations: Supplies Purchases
 - a. Items Purchased
 - b. Item's Vendor Supplier Financial Information
- 5. Customer Clients Path: Customer Clients: Customer Client
 - a. Customer/Client Contact Information Note: If the customer financial information has not been identified it needs to be now.
 - b. Services/Products Provided Note: The services and products you provide your customers.
 - c. Billing Management

6. Optional

- a. Calendar Contacts
 - i. Addresses
- b. Security
 - i. Identify a Security Administrator
 - ii. Usernames
 - iii. Passwords

Note: Your equineGenie purchase includes free setup help and product training – take advantage of it!