



**The System Requirements**  
**The Program**  
**Entering Information**  
**Reports**  
**Setup Sequence**

# The System

## Table of Content

System Requirements .....	3
System Font .....	3
Display Text Size .....	4
Display Size.....	5
The Program.....	6
Program Exit.....	6
Program Symbols.....	7
Home Symbol .....	7
Return Symbol.....	7
Genie Notes.....	8
White / Red Genie Notes .....	8
Dates .....	9
Address Book.....	10
Program Warnings.....	11
Exiting A Screen .....	11
Delete An Image .....	12
Deleting An Item.....	13
Remove An Entry.....	14
Entering Information .....	15
Line Item Dropdown .....	15
Check Box Dropdown .....	16
[New 'Entry'] Dropdown.....	17
Auto Learn Dropdown.....	18
Text Box.....	19
Enter Information.....	20
Database Entries.....	21
Reports .....	22
Setup Sequence .....	24

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

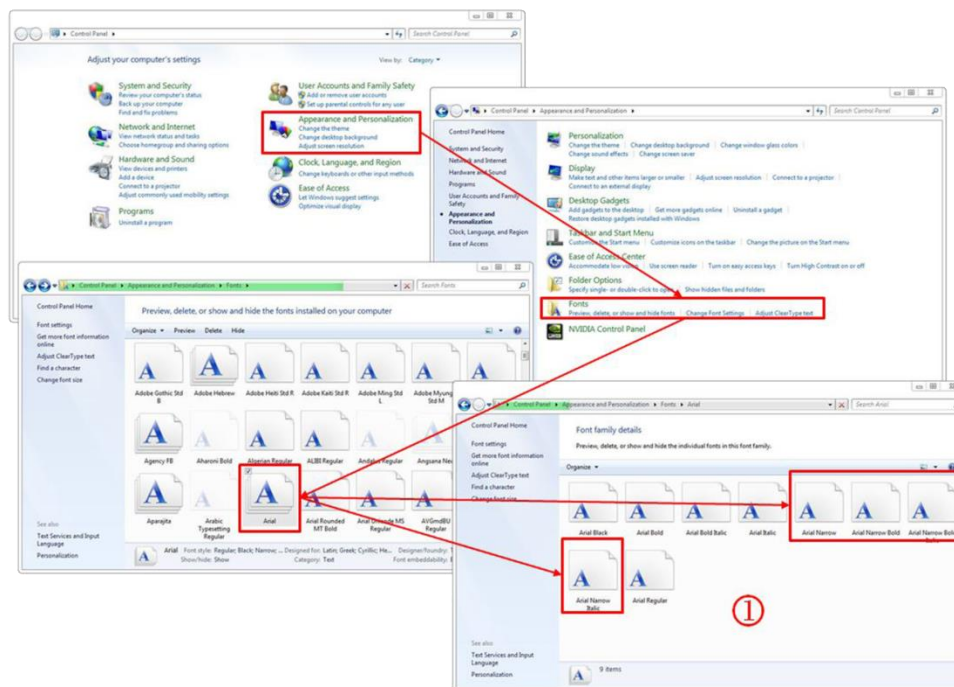
## System Requirements

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, delete, show and hide fonts*

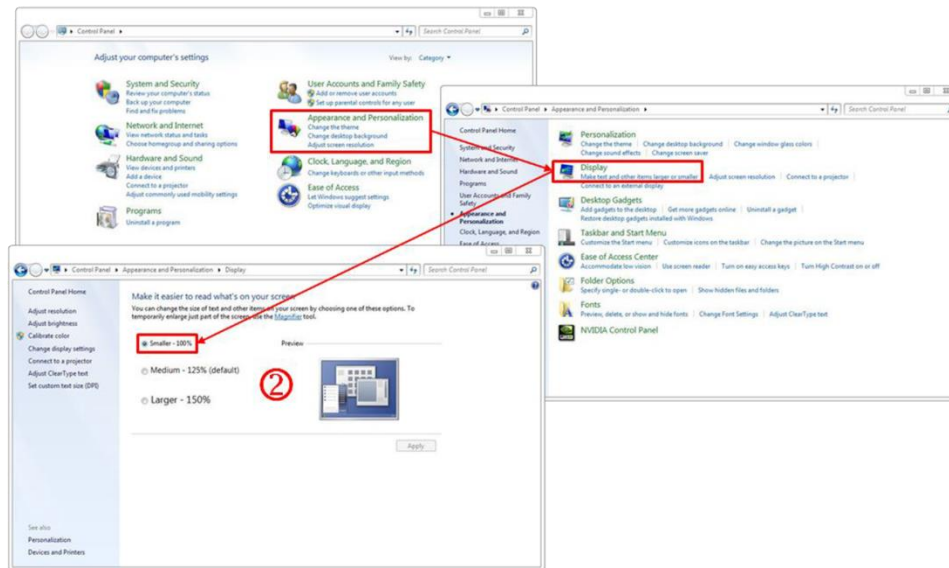


① If the text displayed on equineGenie screens is too large, or doesn't fit in the menu dropdowns, you probably do not have the **Arial Narrow** font on your computer or your display text size is set too large.

**Note:** The **Arial Narrow** font can be obtained from the equineGenie support team by emailing the Genie team: [info@genieatwork.com](mailto:info@genieatwork.com).

## 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*

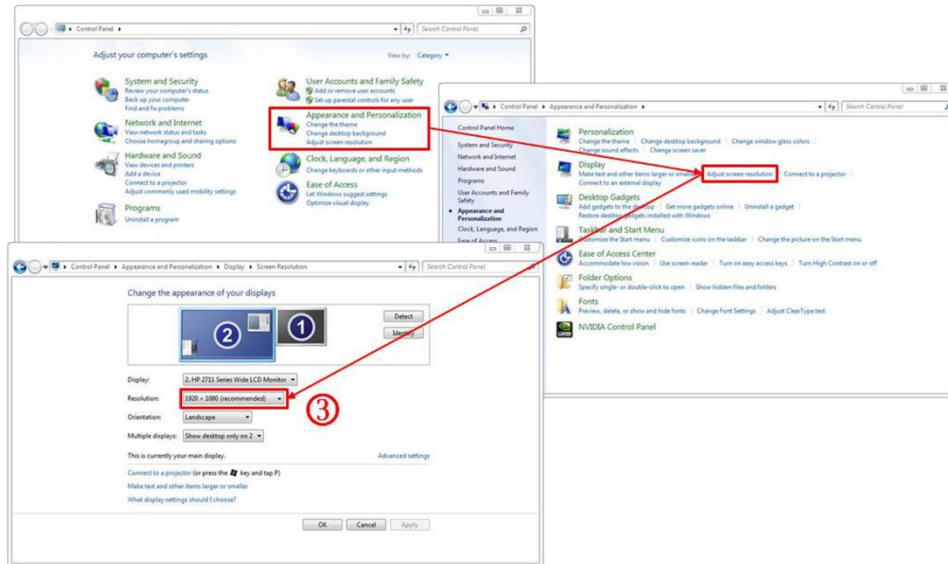


- ② If the text displayed on the equineGenie screens is too large and you have the **Ariel Narrow** fonts installed, you probably do not have your display text size set correctly.

**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



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.

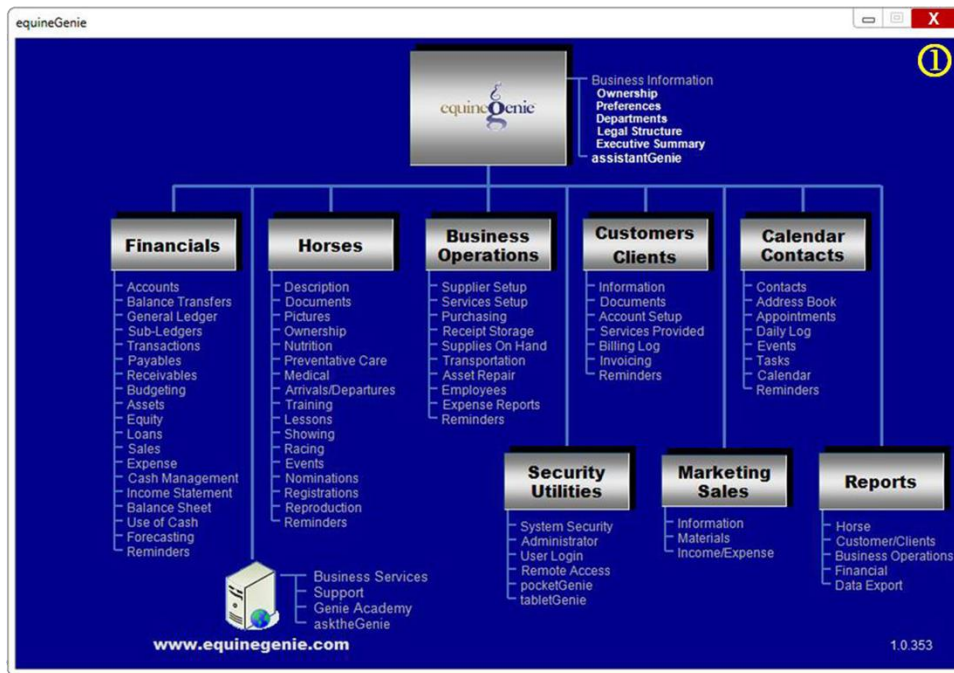
[Return to the Table of Content](#)

## 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.



- ① 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

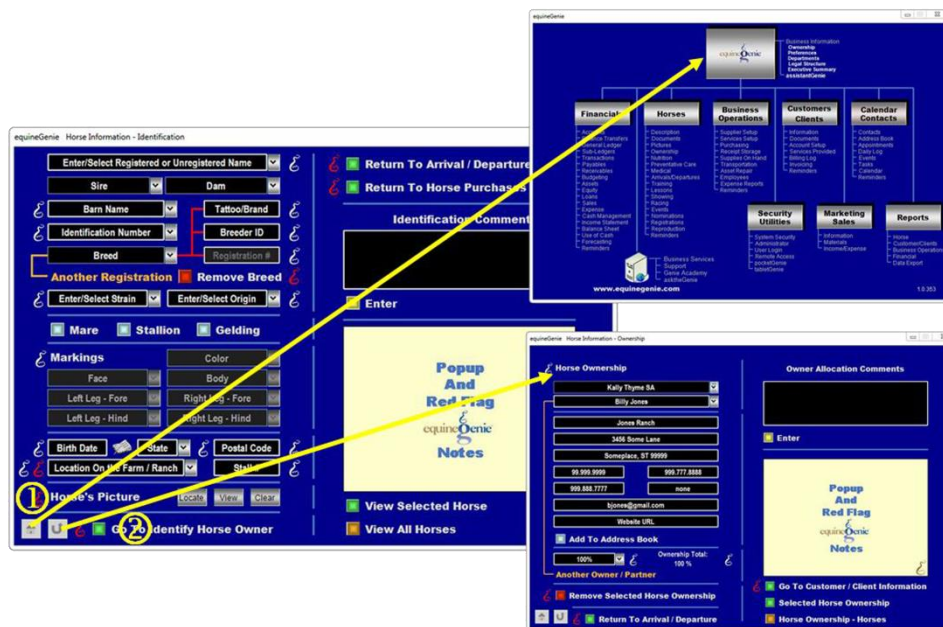


The Home symbol is represented by a house.

### Return Symbol



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

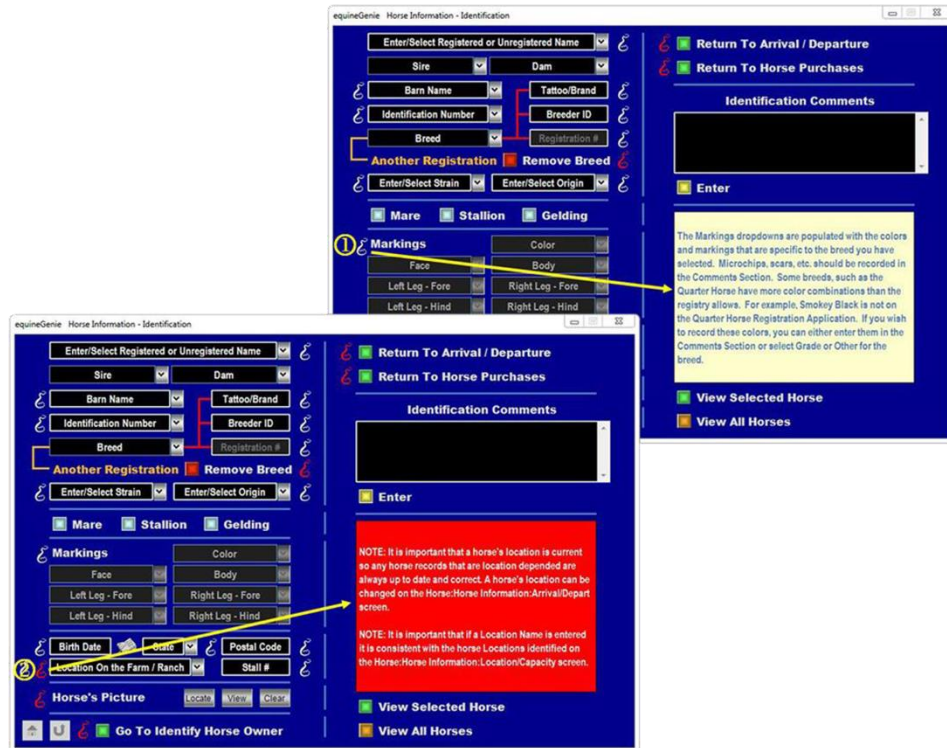


- ① Selection of the house symbol in a screen's lower left corner will display equineGenie's Home screen.
- ② Selection of the U-turn symbol in the lower left corner will display the previous equineGenie screen.

## 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

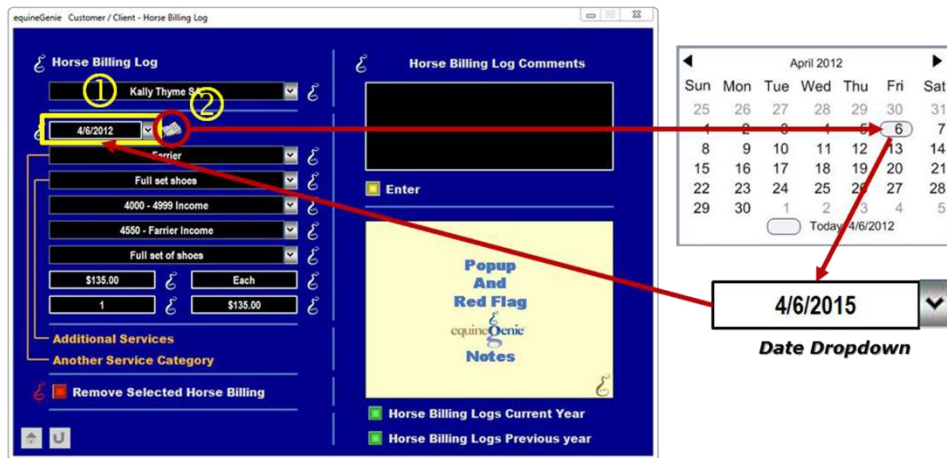


- ① Selection of a White Genie Note displays information about the item that is adjacent to it.
- ② Selection of a Red Genie Note displays a caution or warning about the item that is adjacent to it.



## 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.



- ① 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.

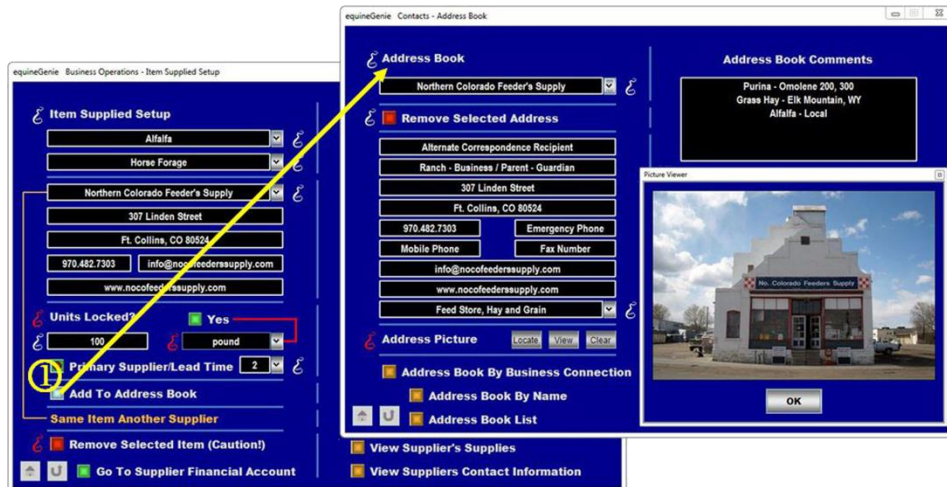


- ④ A different year can be displayed by 'clicking' on the calendar's year which will display the current decade in which the current year is included.



## 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.



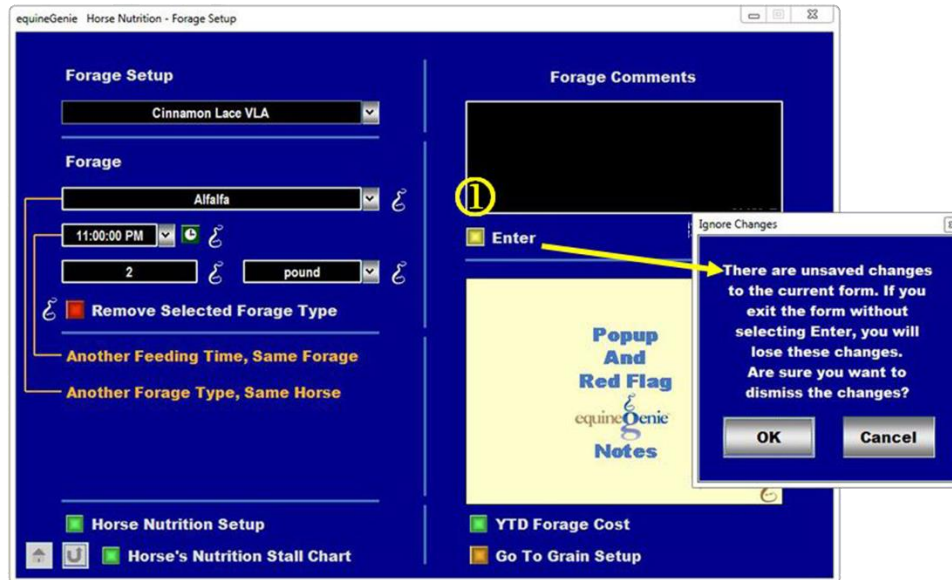
- ① When the 'Add To Address Book' button is selected the address information on the initiating screen will be added to the Address Book. In some cases the Address Book can accept more address information than is provided by the initiating screen. To add additional information to a contact's address, 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.



- ① 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

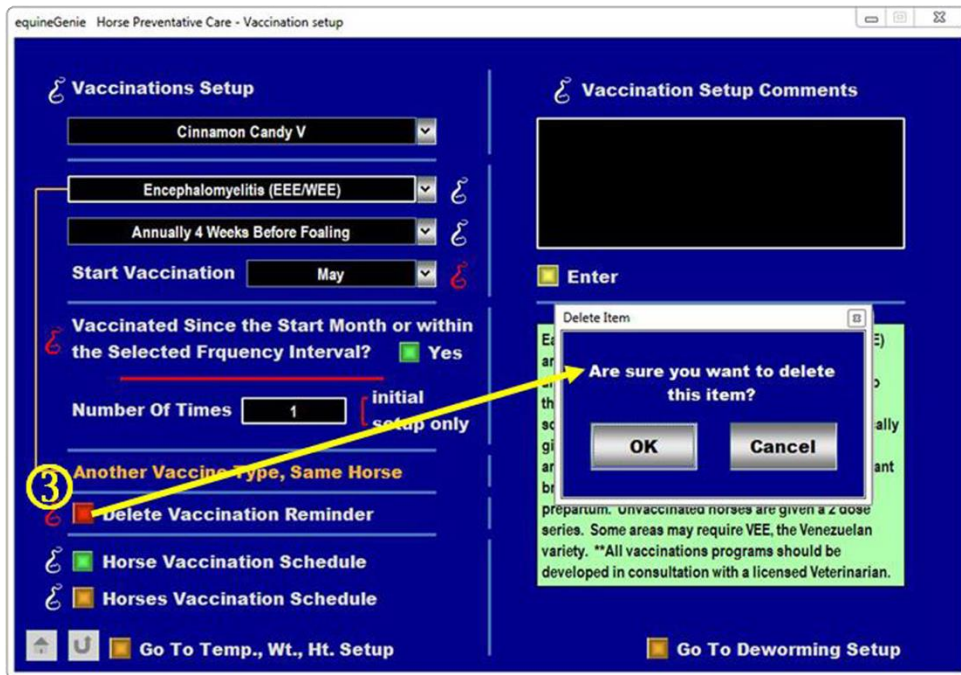
A system warning is displayed if you elect to Delete An Image.



- ② 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

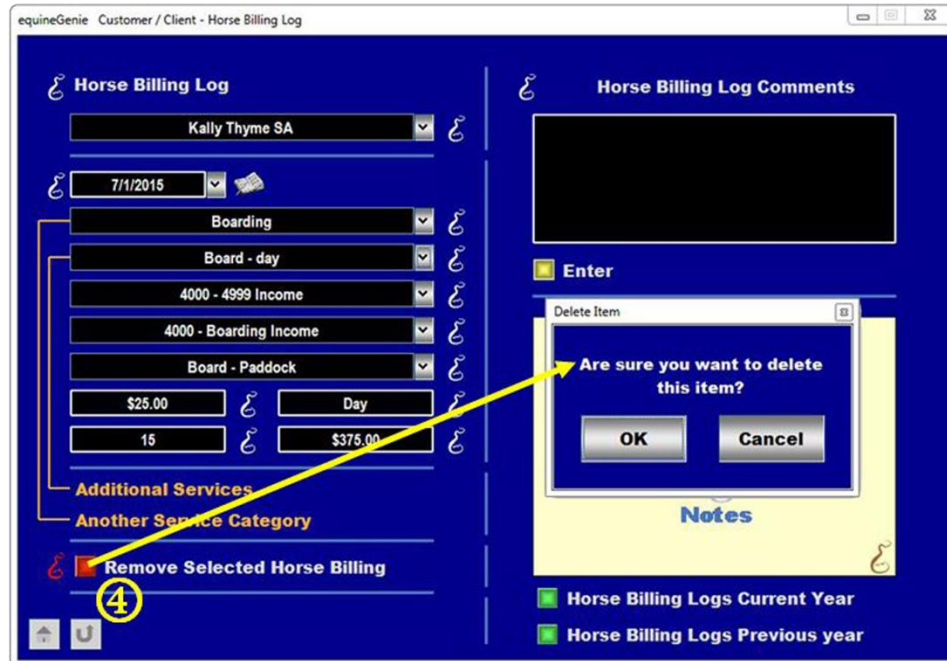
A system warning is displayed if you elect to Delete an item.



- 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.



- ④ 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.

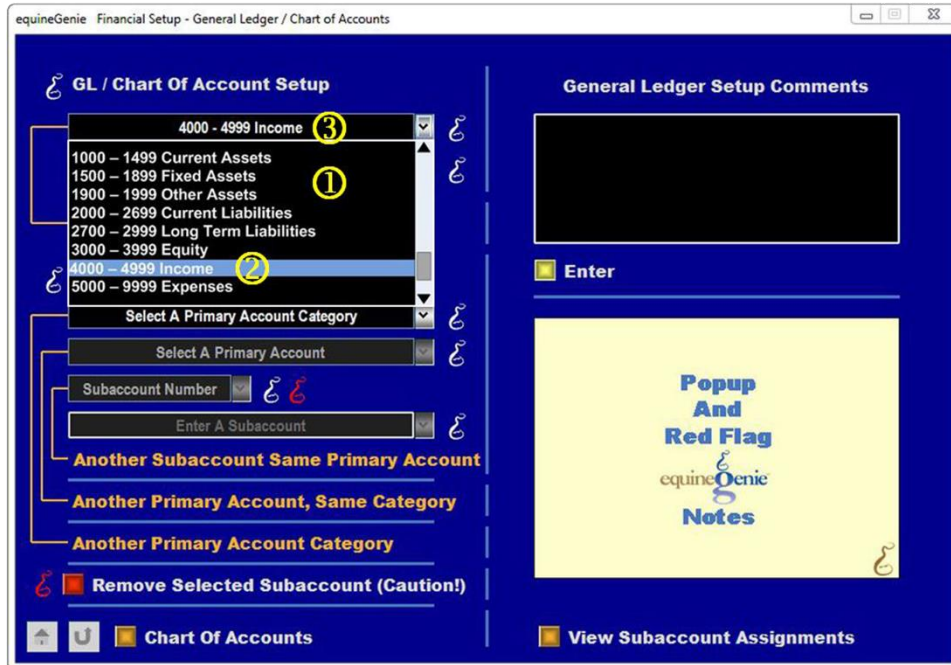
[Return to the Table of Content](#)

## 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.



① Selecting a Line Item Dropdown will display the line items available for selection.

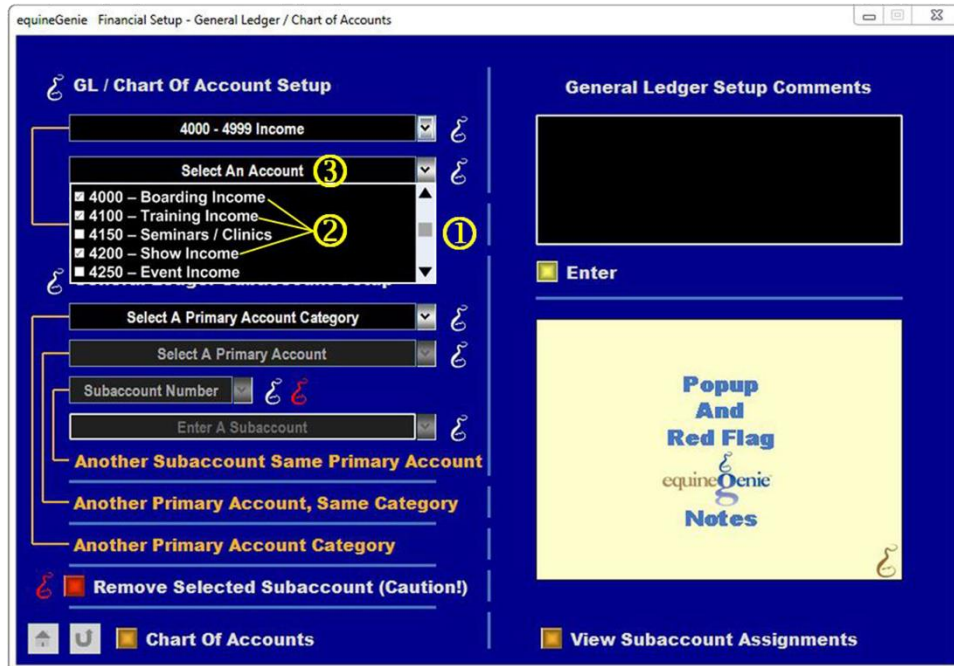
**Note:** A maximum of five items are displayed in a dropdown. If more than five items are contained in a dropdown the scroll bar on the right side of the dropdown is used to see the remaining items.

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.



- ① 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.

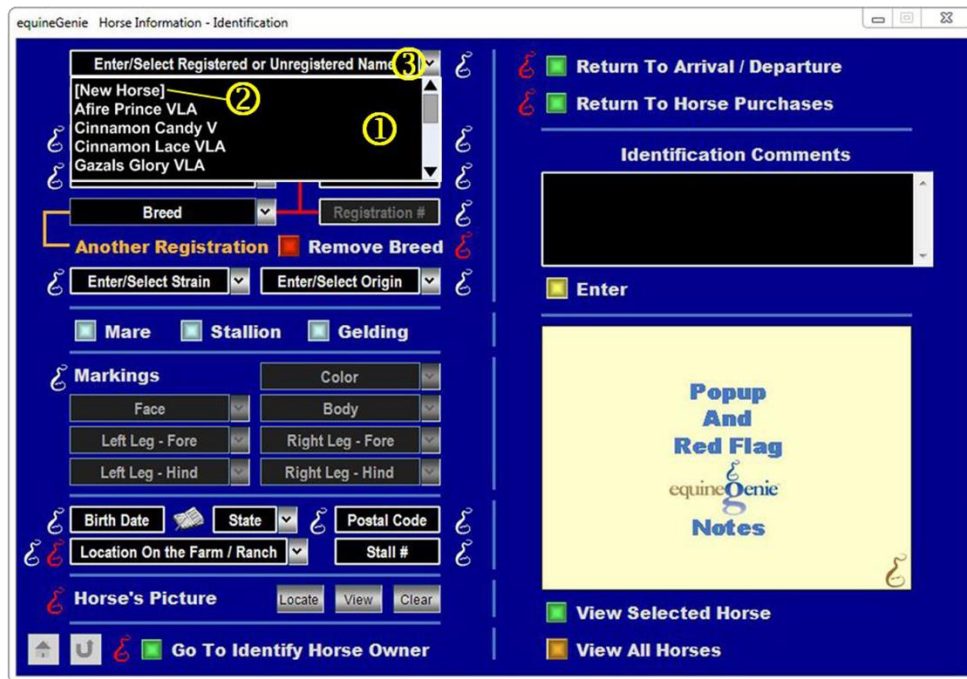
- ② Clicking on a Check Box will add a check mark to the box indicating the check box has been selected. Multiple check boxes can be checked.
- ③ No selected check boxes will be displayed the Check Box dropdown box after the dropdown closes.

**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.



- 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.

- ① 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.

- ① 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 **do not** have to be relected to enter additional Subaccount information for the same Account Category and Account.

The screenshot shows the 'equineGenie Financial Setup - General Ledger / Chart of Accounts' window. On the left, under 'GL / Chart Of Account Setup', there are two dropdown menus: 'Select An Account Category' and 'Select An Account'. Below these are three options: 'Another Category', 'General Ledger Subaccount Setup', and 'Remove Selected Subaccount (Caution!)'. The 'General Ledger Subaccount Setup' section has four dropdown menus: '5000 - 9999 Expenses', '5510 - Horse, Grain', '5510.001', and 'Purina - Omolene 200'. The '5510.001' dropdown is highlighted with a yellow box and a circled '2'. Below it, the option 'Another Subaccount Same Primary Account' is highlighted with an orange box and a circled '1'. Other options include 'Another Primary Account, Same Category' and 'Another Primary Account Category'. On the right, under 'General Ledger Setup Comments', there is a large empty text area, an 'Enter' button, and a yellow box with the text 'Popup And Red Flag & equineGenie Notes'. At the bottom, there are buttons for 'Chart Of Accounts' and 'View Subaccount Assignments'.

- 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 organized and Think 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.

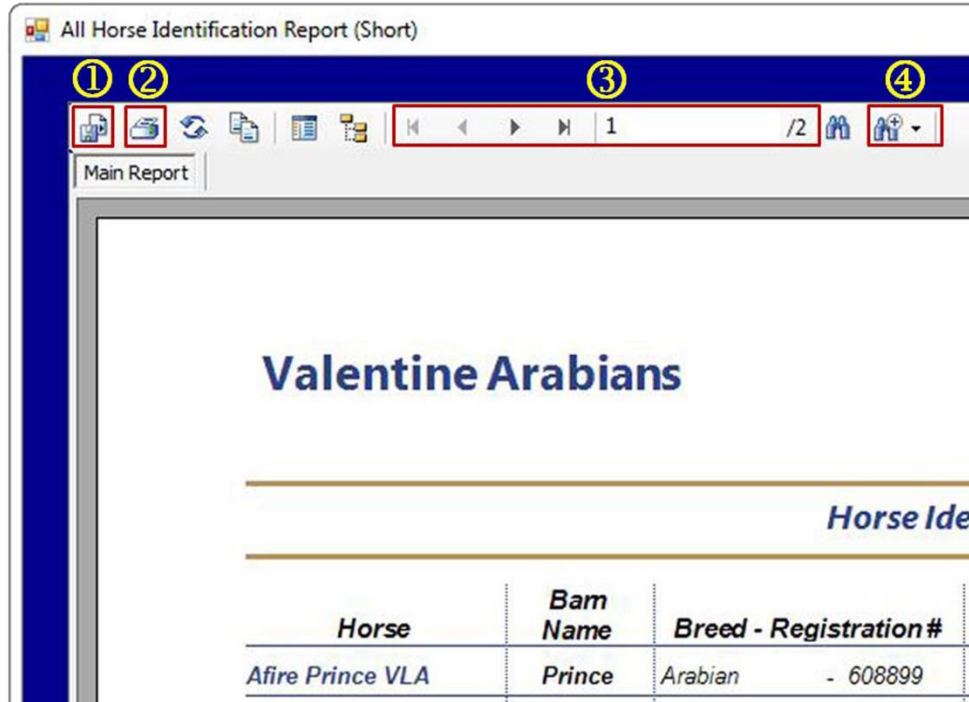
You can change the information in a database record by recalling a screen and changing its information. However, in a rare case where the information is critical financial information a database record can only be removed by a GenieCo representative. This is to prevent 'creative' accounting without the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

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

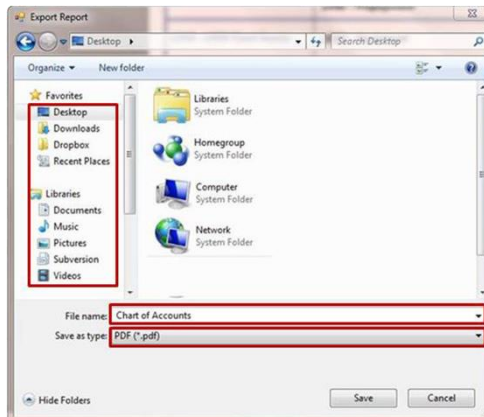
[Return to the Table of Content](#)

## 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.



- 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.



**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.

[Return to the Table of Content](#)

## 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!

[Return to the Table of Content](#)