Horse Information

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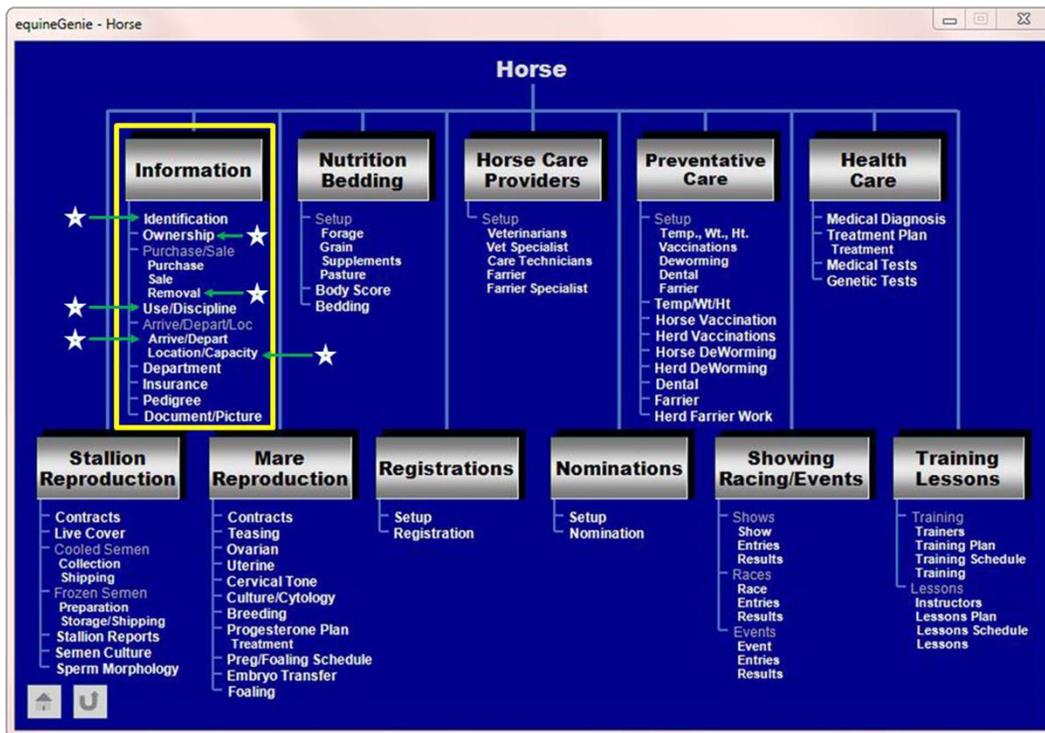
Horses Information – Identification

Path: Home: Horses: Information: Identification

There are no prerequisite setups.

Think/Plan before you setup the horses in equineGenie! Enter all the 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) The horse knowledgebase consists of expert information from the AAEP (American Association of Equine Practitioners) and the specific breed registries. The more information you can provide on a horse, the better job equineGenie can do in assisting you managing and caring for your business's horses.

① **To add a horse, select** [New Horse] from the 'Enter / Select Registered or Unregistered Name dropdown and click in the dropdown box and enter the horse's name.

Note (1): Once a horse has been entered it will be displayed in the dropdown list. Selecting a horse that has been already entered will recall that horse's identification information. You can change a horse's identification information after it has been displayed.

Hint: An entered horse can be removed from equineGenie. To remove a horse, see the Horse Information – Removal training in this document. (**Remove Horse**)

② **Enter** a horse's Sire and Dam in the respective Sire and Dam drop-downs. The Sire and Dam entered are auto learned and can be selected for another horse without

having to be reentered. The horses sire and dam are automatically transferred to the horse's pedigree.

③ If a horse has a barn name, **Enter the barn name** in the barn name dropdown. If the horse has an identification number, **Enter its identification number** in the identification number dropdown.

Note (2): a horse's identification number can be a breeding collar number, a microchip number or any other identification number the business elects to use.

Hint: A horse's identification information can be recalled by selecting any of its names or its identification number from the respective dropdowns.

④ **Select the horse's breed** from the breed dropdown. Selection of a horses breed directs equineGenie's knowledgebase to information that is unique to the selected breed. Selection of a horse's breed activates the registration number box. **Enter the horse's registration number** in the Registration # box. If the horse is registered with multiple registries, **Selection of the orange 'Another Registration'** will enter the 1st registration and enable you to select another breed and enter another registration number for the same horse.

Selection of the **'Remove Breed'** button is used to remove a horse's breed. If you need to remove a horse's breed it is suggested that you follow the instructions in the **Red Genie Note** on the right side of the **Remove Breed** button.

If a horse has a tattoo or brand, **Enter** the tattoo or brand in the Tattoo/Brand box. If a horse has a breeder ID, **Enter** it in the Breeder ID box.

If there are different strains for the breed of the horse being identified, the horse's strain can be **Entered or Selected** from the Enter/Select Strain dropdown. Strains enter are remembered by equineGenie and do not have to be reentered.

If there are different origins for the breed of horse being identified, the horse's origin can be **Entered or Selected** from the Enter/Select Origin dropdown. Origins entered are remembered by equineGenie and do not have to be reentered.

Note (3): If the horse is a registered horse, it is strongly recommended that you identify its breed. equineGenie can assist you better if a horse's breed is known. The breed dropdown lists more than 60 of the most popular horse breeds. If the breed dropdown does not contain your horse's breed, **it can be added as long as the breed has a verifiable breed registry**.

⑤ Select the horse's gender by clicking on the **Mare**, **Stallion** or **Gelding** button.

Note (5): The horse's gender assists equineGenie in recommending the appropriate AAEP preventative care protocols.

⑥ Select the horse's Color, and it's Face, Body and Leg markings from the respective dropdowns.

Note (6): The information in the horse color and markings dropdowns has been verified with the breed 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 the horse's birth date in the Birth Date box 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).

Select a state or province in which the horse was born from the State dropdown, if the state or province is known. **See Note (8)**

Enter the postal code in the Postal Code box where the horse is currently stabled. **See Note (9)**

Note (7): A horse's birthdate assists equineGenie and recommending the appropriate AAEP preventative care protocols.

Note (8): A horse's birth place is optional, but is good to know for horses used in racing. If a horse is foreign-born the abbreviation for the country in which it was born can be added and will be remembered by equineGenie.

Note (9): A horse's postal code is where a horse is stables. It assists equineGenie in recommending the appropriate AAEP preventative care protocols. For example; horses stabled in warm humid climates require a different encephalomyelitis vaccine then horses stabled in cold dry climates.

⑧ **Enter** the horse's Location in the Location On The Farm / Ranch dropdown where it is currently located on the farm or ranch.

Note (10): A horse's location is important for herd vaccinations, deworming, and farrier work by location. Itr is also used for barn / stall availability or pasture capacity.

⑨ **A picture of a horse can be added** to equineGenie by selecting the Locate button to locate the horse's picture file. Opening the horse's picture file 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 all reports specific to that horse.

Note (11): A horse's picture needs to have a, 3:2 aspect ratio. This means the horse's picture selected for equineGenie needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2. 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.

⑩ If the horse entered is 100% owned by the business, the business is automatically assigned ownership. If the business does not own the horse, the Go To Identify

Horse Owner button should be selected. Selection of the **Enter** button saves the horse's identification information in equineGenie and clears the screen.

❶ **Selection** of the Go To Identify Horse Owner button saves the Horse Information – Identification information in equineGenie, clears the screen and displays the Horse Information – Ownership screen.

Hint: Remember, if the business owns the horse, equineGenie automatically makes the business the 100% owner of the horse. If the business is not a 100% owner of the horse the Go To Identify Horse Owner button should be selected.

❷ **Selection** of the Return To Arrival / Departure button saves the Horse Information – Identification information in equineGenie, clears the screen and displays the Horse – Arrivals/Departures/Return/Change Location screen.

❸ **Selection** of the Return To Horse Purchases button saves the Horse Information – Identification information in equineGenie, clears the screen and displays the Horse Information – Purchase screen.

❹ **Selection** of the '*View Selected Horse*' will enable the selected horse's identification information to be viewed, exported and/or printed.

❺ **Selection** of the '*View All Horses*' will enable all horse's identification information to be viewed, exported and/or printed.

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Horses Information – Ownership

Path: Home: Horses: Information: Ownership

There is a prerequisite setup required before a horse's ownership can be entered. A horse must be entered in equineGenie, (Horses: Information: Identification). (Horse Identification)

Think/Plan before you assign a horse's ownership! The Horse Ownership screen is used to assign or change a horse's ownership. A horse's ownership assignment is required to bill services and/or products to a horse and Invoice a horse's owner. If the business owns 100% of the horse the Horse Information – Ownership screen ownership information doesn't need to be entered.

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

Note (1): If the Horse Ownership screen is entered from the Horse Information – Identification screen the horse displayed on the Horse Information – Identification screen will be displayed on the Horse Information – Ownership screen. The business owner and the business owner's contact information will be displayed if it is the 1st time entering the Horse Information – Ownership screen. If it is not the 1st time, the horse's owner information that was previously entered will be displayed.

② If it is the 1st time entering the Horse Ownership screen and the Business is not the owner of the horse, the horse ownership percentage must be set to 0% in the Ownership % dropdown ④ and the orange **Another Owner / Partner** ⑤ selected to clear the business owners information. This same procedure needs to be done to change a horse's ownership before the new owner can be entered – see ④ below.

After the horse's ownership is cleared, **Select or Enter** the horse owner's contact information.

Note (2): If a horse has multiple owners each owner's contact information and ownership percentage will be entered. See ④ below.

③ **Selecting** the 'Add To Address Book' button will add the horse owner to the equineGenie address book.

Hint: The Address Book may allow for more customer/client information to be added. Path – Home: Calendar Contacts: Contacts: Address Book.

④ **Assign a horse's ownership** percentage from the Ownership % dropdown. If the ownership percentage is not available in the dropdown it can be manually entered. A percentage can be any percent; e.g. 33.33%, 27.5%, etc. A horse's total ownership should not exceed 100%. A horse's Ownership Total is displayed to the right of the Ownership % dropdown and increases as each new owner's percentage is assigned.

⑤ **To change a horse's ownership** set the ownership percentage in the Ownership (%) dropdown to 0%. After setting the Ownership (%) to 0%, select the orange **Another Owner / Partner**. Selecting **Another Owner / Partner** clears the ownership information enabling a new horse owner to be entered. **Assigning a horse's owners** is repeated until all owners and their ownership percentage have been assigned.

Horse Ownership Workflow
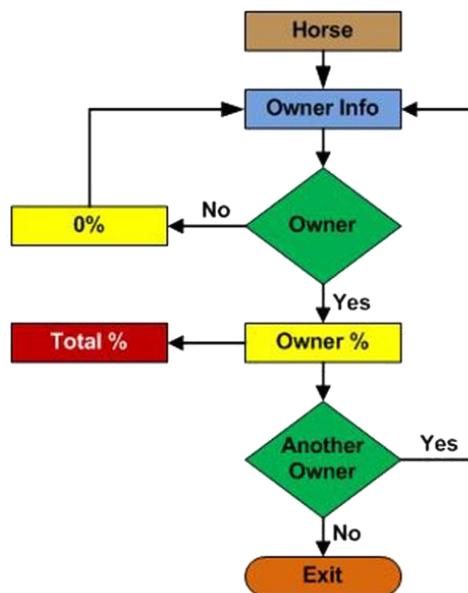
Note (3): equineGenie automatically splits a horse's charges between its owners based on each owner's ownership percentage.

⑥ **If you need to remove a horse owner**, it can be removed by displaying the horse, its owner and the owner's ownership percentage and then, selecting the **Remove Selected Horse Ownership Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the horse ownership.

⑦ **Select Enter** before leaving the Horse Information screen if the 'Return To Arrival / Departure' or 'Go To Customer / Client Information' buttons are not selected.

❶ **Select** the 'Return To Arrival / Departure' button if the horse ownership input is from a new arrival horse. Selecting 'Return To Arrival / Departure, enters the Horse Information – Ownership screen information and displays the Horse – Arrival/Departure/Return/ Change Location screen.

❷ **Select** the 'Go To Customer / Client Information', if the horse owner entered is a customer/client that had not been previously entered. Selecting 'Go To Customer / Client Information', enters the Horse Information – Ownership screen information and displays the Customer / Client – Information screen. Selecting this button will enable you to complete the entry of a new customer/client. The Customer / Client – Information screen also allows for more detail to be entered about a customer.

❸ **Selection** of the '*View Selected Horse Ownership'* enables the selected horse's ownership information to be viewed, exported and/or printed.

❹ **Selection** of the '*View Horse Ownership'* enables all horse ownership information to be viewed, exported and/or printed.

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Horses Information – Removal

Path: Home: Horses: Information: Removal

There is a prerequisite setup required before a horse can be removed. A horse must be entered in equineGenie, (Horses: Information: Identification). (Horse Identification)

Think/Plan before you remove a horse! The Horse removal screen is used to remove a horse from the active horse list in equineGenie. A horse is never removed from equineGenie. When it is removed it is made inactive and will not appear in any horse dropdown lists. If records are required on a removed horse the horse can be activated to obtain the required records.

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

② **Select** the **Red, Removed?** button changing it from a **Red, 'No'** to a **Green, 'Yes'**.

Note (1): All horses remain in the Select Horse dropdown list. It a horse needs to be reactivated, select the horse from the dropdown list and select the **Green, Removed?** button changing it from a **Green, 'Yes' to a Red, 'No'.**

Hint: A reactivated horse will be displayed in all horse dropdown lists based on its Use/Discipline selections. To see how a horse's use/discipline is selected, see the Horse Information – Use / Discipline training in this document. (Use / Discipline)

③ If a horse care provider assists in the removal of a horse the care provider can be selected from the Administered/Removed By dropdown list.

Note (2): The horse care providers in the Administered/Removed By list are the horse care providers entered in the Horse Care Providers section. (*Path: Home: Horse: Horse Care Providers*)

④ **The reason** for the removal can be entered in the Reason For Removal dropdown. Any reason entered is remembered by equineGenie and can be selected for another horse removed for the same reason.

⑤ **Enter** the horse's removal date in the Removal Date box 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).

⑥ If there is a cost associated with the removal, **Enter** the removal cost in the Remove Cost box and select the **Red $** to complete the financial transaction.

⑦ **Documentation associated with the removed horse** can be saved and recalled in equineGenie. The saved documentation can be in a PDF, word, text, image or video file format. Selecting the Locate button will allow the desired file to be located. Opening the file will add the selection to equineGenie. Selecting the View button allows the selection to be viewed. Selecting the Clear button will remove the selection from equineGenie.

Note (3): To ensure that the file of the desired documentation is not missed the directory file type should be set for, **All files (*.*)**.

⑧ **Select Enter** before leaving the Horse Information – Removal screen if the 'Go To Asset Management' button is not selected.

❶ **Select** the 'Go To Asset Management' button if the horse being removed is setup as a business asset. Selecting the 'Go To Asset Management' button will enter the removed horse information, clear the screen and display the Financial management – Fixed Asset screen (*Path: Home: Financials: Financial Management: Asset Management*)

❷ **Selection** of the '*View Removed Horses'* enables all horses removed by year to be viewed, exported and/or printed.

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Horses Information – Use / Discipline

Path: Home: Horses: Information: Use/Discipline

There is a prerequisite setup required before a horse's use / discipline can be assigned. A horse must be entered in equineGenie, (Horses: Information: Identification. (Horse Identification)

Think/Plan before you assign a horse's use / discipline! The Horse Use/Discipline screen is used to identify how a horse is used and the way it is used. A horse's use/discipline assists in identifying the correct preventative care protocols. A horse's use/discipline is also used to filter the horse dropdown lists in other horse task and activity areas such as reproduction, showing, training and lessons.

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

② **Select** the horse's use from the Select Use dropdown.

Note (1): Selecting a horse's Use identifies how the business uses the selected horse. A horse's Use assists the AAEP knowledgebase in recommending the appropriate preventative care protocols.

Note (2): Selecting a horse's Use reduces the number of horses displayed in horse dropdowns where a horse is used. **For Example:** If a horse is used for lessons, selecting the Lessons checkbox will add the horse to the active list of horses displayed on the lesson screen.

③ **Select** the horse's discipline from the Select Discipline dropdown.

Note (3): Selecting a horse's Discipline identifies the way a selected horse is used. A horse's Discipline assists the AAEP knowledgebase in recommending the appropriate preventative care protocols and how often they are administered. For example: The recommended frequency for vaccinations is more frequent for show horses than pleasure horses.

Note (4): The use and disciplines of a horse are selected from a check box dropdown list. A horse can be identified for more than one use or discipline. To close a check box list 'click' outside the dropdown.

④ **Select Enter before leaving the Horse Use / Discipline screen to save the horse use and discipline selections.**

Hint: If a horse's Use and/or Discipline changes it is easily removed and/or updated by selecting a horse and unchecking and/or checking its Use and/or Discipline.

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Horses – Arrivals/Departures/Return/Change Location

Path: Home: Horses: Information: Arrive/Depart

There is a prerequisite setup required before a horse can be departed, returned of have its location changed. A horse must be entered in equineGenie, (Horses: Information: Identification. (Horse Identification)

Think/Plan before you arrive, depart, return, or change a horse's location!

Note: It is suggested that horses already present in a business are entered on the Horse Information – Identification screen unless a horse's arrival date is important.
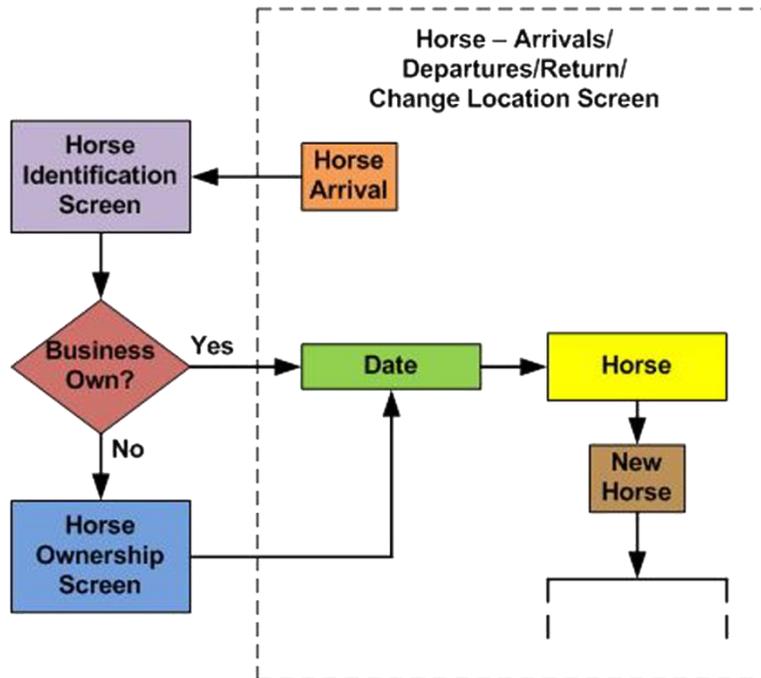

Horse Arrival – New Horse

① **Select** the Horse Arrival button if a horse is new to the business.

Note (1): Selecting the Horse Arrival button will display the Horse Information – Identification screen. The arriving horse's information is entered. After the horse's information has been entered, and if the horse is owned by the business, the 'Return To Arrival / Departure' button is selected displaying the Horse – Arrivals/Departures/Return/Change Location screen where the arriving horse's arrival information is completed.

If the horse is not owned by the business, after the horse's information has been entered the 'Go To Identify Horse Owner' button is selected displaying the Horse Information – Ownership screen. The owner or owners of the horse are entered and their ownership percentages assigned. When the horse's ownership and their ownership percentages have been assigned selecting the 'Return To Arrival / Departure' button is selected displaying the Horse – Arrivals/Departures/Return/Change Location screen where the arriving horse's arrival information is completed.

Horse Arrival Workflow

② **Select the Date** the horse arrived.

③ **Selecting the Date** the horse arrived will display the horse's name in the select Horse dropdown.

④ **Selecting the Date** the New Horse button will be automatically selected.

⑤ If the horse's location was entered on the Horse Information – Identification screen it will be displayed in the Horse Location dropdown. If it was not entered it can be entered.

Relocate Horse

② **Select the Date** the horse is relocated.

③ **Select** the horse being relocated from the Select Horse dropdown.

④ **Select** the Relocate Horse button.

⑤ **Enter or Select** the horse's new location in the Horse Location dropdown. If a Stall is involved with the new location, enter the Stall #.

Note (2): If previous locations have been entered, a previous location can be selected from the Horse Location dropdown.

Returning Horse

② **Select the Date** the horse returns.

③ **Select** the returning horse from the Select Horse dropdown.

④ **Select** the Return Horse button.

⑤ **Enter or Select** the returning horse's location in the Horse Location dropdown. If a Stall is involved with the new location, enter the Stall #. **Enter** the reason the horse is returning in the Reason For Return dropdown.

Note (3): If previous locations have been entered, a previous location can be selected from the Horse Location dropdown.

Note (4): If previous return reasons have been entered, a return reason can be selected from the Reason For Return dropdown.

Note (5): When a horse is returned all its records prior to being departed are reactivated and do not have to be reentered. However, if anything has changed the associated record will have to be updated.

Departing Horse

② **Select the Date** the horse departs.

③ **Select** the departing horse from the Select Horse dropdown.

④ **Select** the Depart Horse button.

Note (6): When the Depart Horse button is selected a warning message will be displayed reminding to make sure all the horse's records are up to date.

Horse Departing Warning
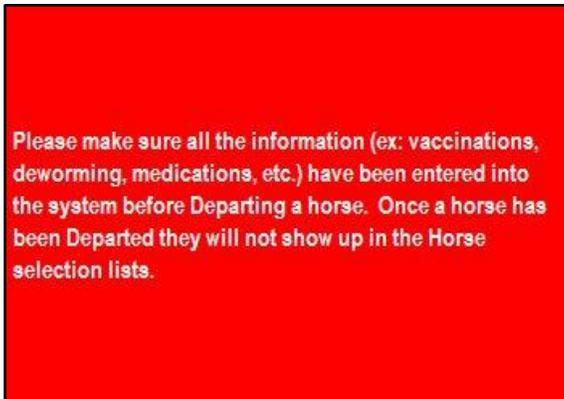
Please make sure all the information (ex: vaccinations, deworming, medications, etc.) have been entered into the system before Departing a horse. Once a horse has been Departed they will not show up in the Horse selection lists.

⑤ **Enter** the reason the horse is departing in the Reason For Departure dropdown.

Note (7): If previous departure reasons have been entered, a departure reason can be selected from the Reason For Departure dropdown.

Note (8): When a horse is departed it is still present in equineGenie, but deactivated from any horse dropdowns.

⑥ Pictures of an arriving or departing horse can be added to equineGenie. A picture can be identified with an identifying name and if it is an Arrival or Departure picture.

To add a horse's picture select the Locate button to locate the horse's picture file. Opening the horse's picture file will automatically add it to equineGenie. Selecting the View button allows you to view the horse's picture in equineGenie. Selecting the Clear button will remove the horse's picture from equineGenie.

To add multiple pictures select the orange **'Another Picture'**. Selecting **'Another Picture'** will clear the previous picture's information and prepare equineGenie to accept another picture. Repeat the picture process until all the arrival or departure pictures have been added.

Note (11): A horse's Arrival or Departure picture needs to have a, 3:2 aspect ratio. This means the horse's picture selected for equineGenie needs to be a 3 x 2, 6 x 4 or any other size as long as the aspect ratio is 3:2. 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 a horse's picture.

⑦ **If you need to remove a Arrive / Departure entry**, it can be removed by displaying the horse and its arrival or departure entry and then, selecting the **Remove Selected Arrive / Depart Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the arrival or departure.

⑧ **Select Enter before leaving the Horse – Arrivals/Departures/Return/Change Location screen.**

❶ **Selection** of the '*Horse Status / Location'* enables the selected horse's status and location to be viewed, exported and/or printed.

❷ **Selection** of the '*All Horse Location'* enables the location of all the horses to be viewed, exported and/or printed.

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Horses –Location / Location Capacity

Path: Home: Horses: Information: Location/Capacity

There is no prerequisite setup required.

Think/Plan before identifying the locations and their capacity where the business's horses will be or are located!

① **To add a Location,** select [New Item] from the Enter Or Select A Location dropdown and click in the dropdown box and enter the location's name.

② **Enter** the location's description in the Location Description dropdown.

③ **Enter** the location's horse capacity in the Horse Capacity box.

Note (1): equineGenie reports the number of horse's in each location that has assigned horses. The report identifies a location's horse availability.

④ **If you need to remove a Location**, it can be removed by displaying the location and then, selecting the **Remove Selected Location Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the location.

⑤ **Select Enter before leaving the Horse – Location / Location Capacity screen.**

❶ **Selection** of the '*Horse Location w/Capacity Report'* enables the locations and their horse capacity to be viewed, exported and/or printed.

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