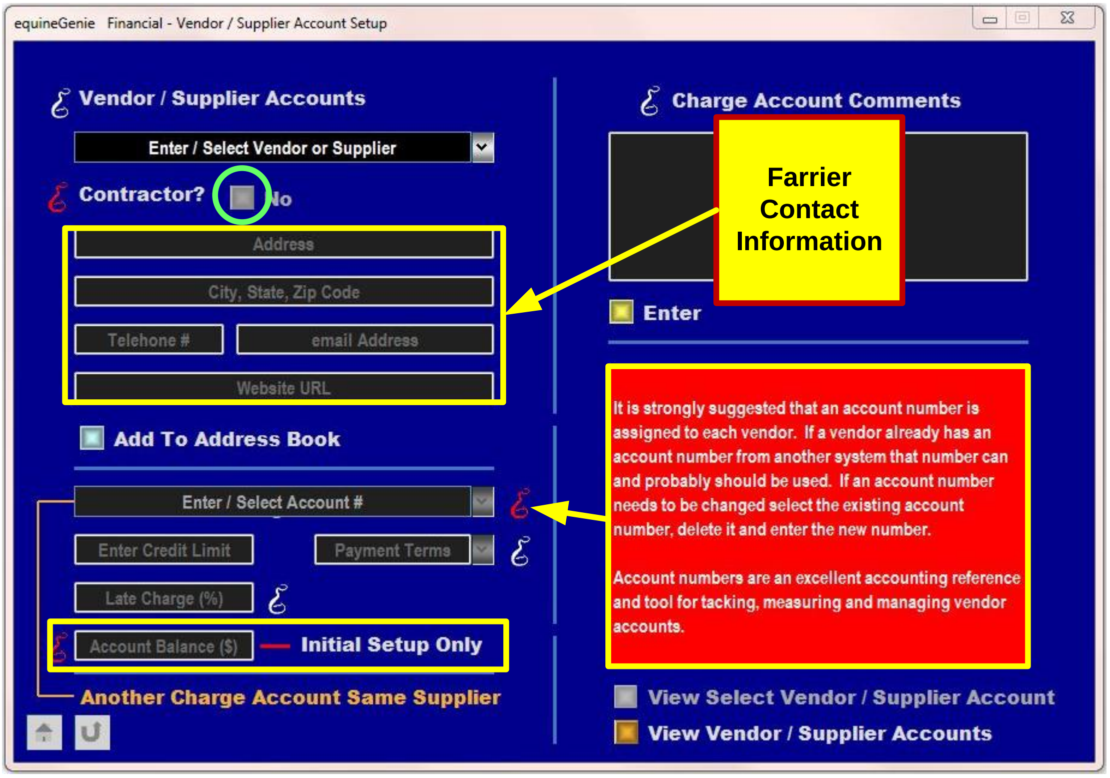
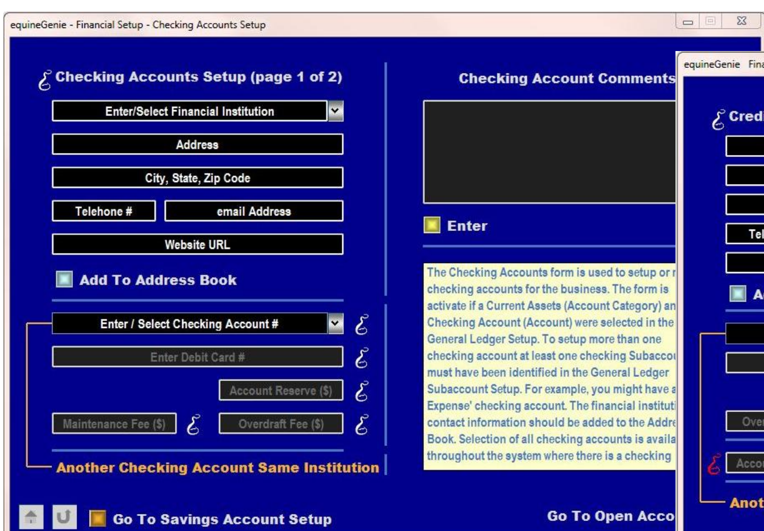
Farrier Setup and Scheduled Work

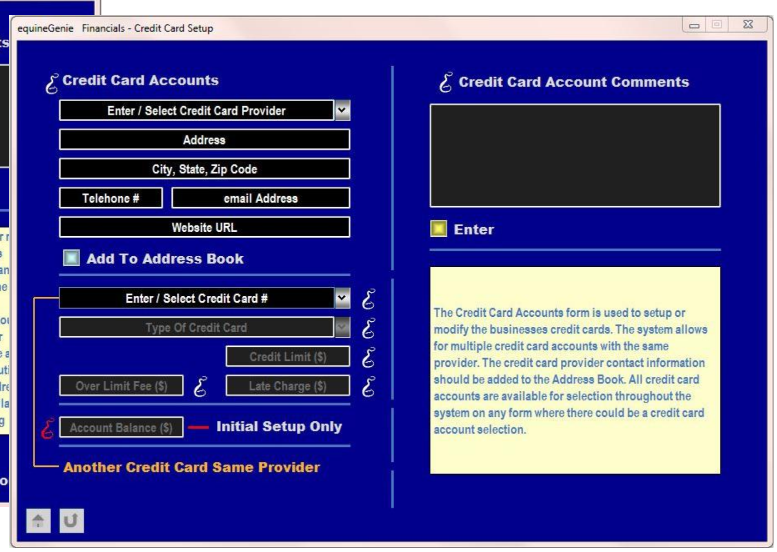
Prerequisites (One-Time Setups)

If you put your Farriers' charges on an account and then pay them with one check when they have completed their work, or if you pay them when they send you a bill, they should be setup as a Vendor to your business. If you pay them for each horse when they complete work on a horse then they do not need to be setup as a vendor. (***Recommendation: Set your Farrier(s) up as a Vendor***)



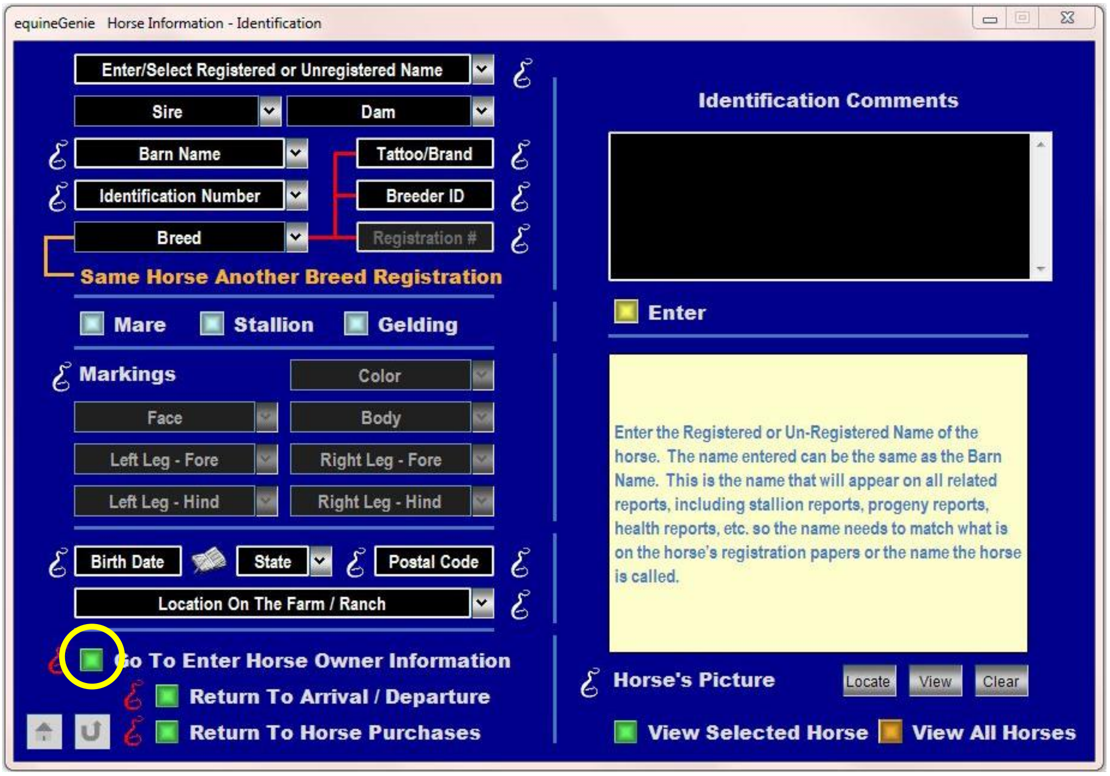
If you setup your Farrier(s) as a Vendor/Supplier, it is suggested that you identify them as a contractor. ***If you identify them as a contractor, equineGenie will track how much money you pay them and if the amount is $600 or greater, equineGenie will generate the information you need to supply them with a 1099. If you have an initial balance with your Farrier(s) be sure to enter that balance so that your Farrier payables will track correctly***. If you have no balance enter '0'. If you 'mouse over' the white or red 'Genie Heads' on-line information will assist you without having to use the equineGenie manual or on-line videos.



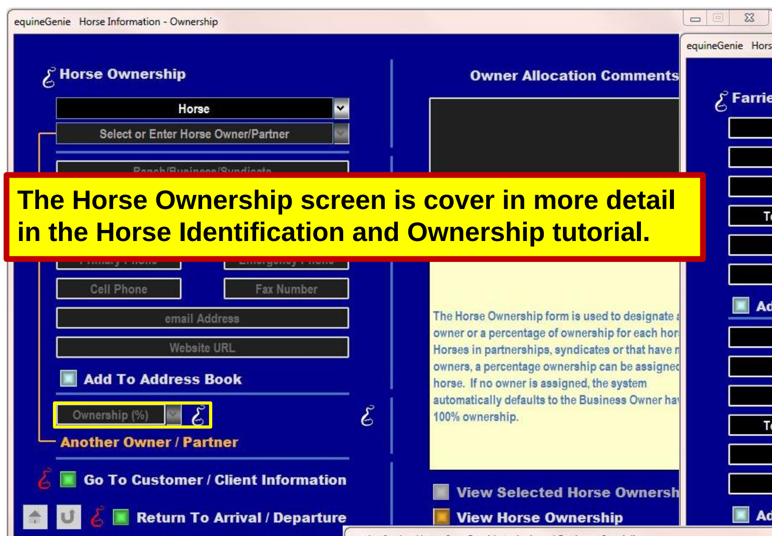


Note: You need to setup your Checking and Credit Card accounts before you can pay your Farrier. See the Business Accounts Setup Tutorial

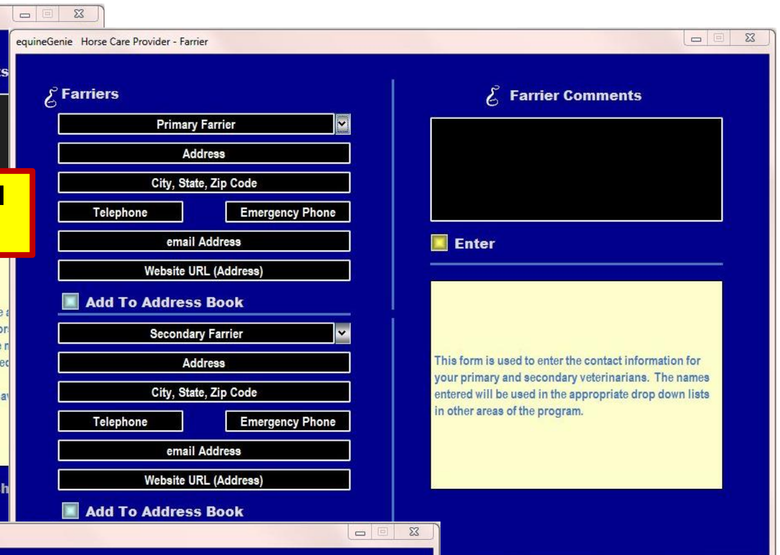
Farrier Work - Prerequisites (One-Time Setups)



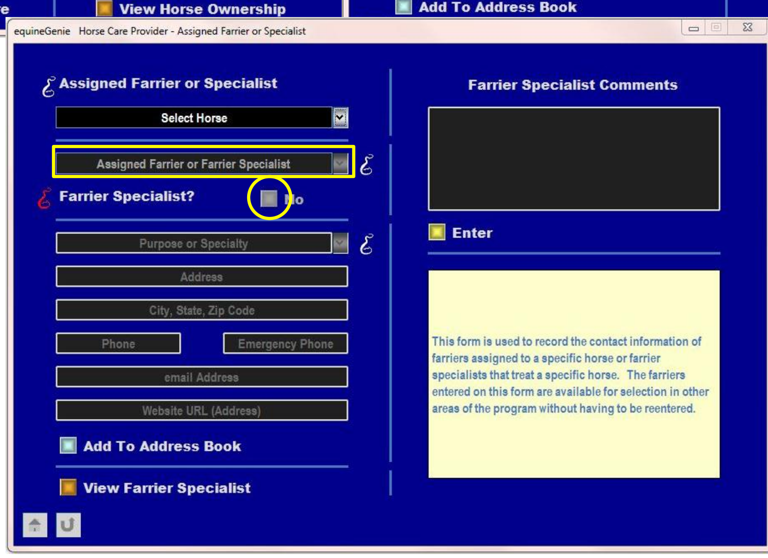
Make sure that any horses that will have Farrier work have already been entered on the Horse Identification screen. ***Note:*** ***Only entered horses will be displayed in the Farrier screens.***



The Horse Ownership screen is cover in more detail in the Horse Identification and Ownership tutorial.

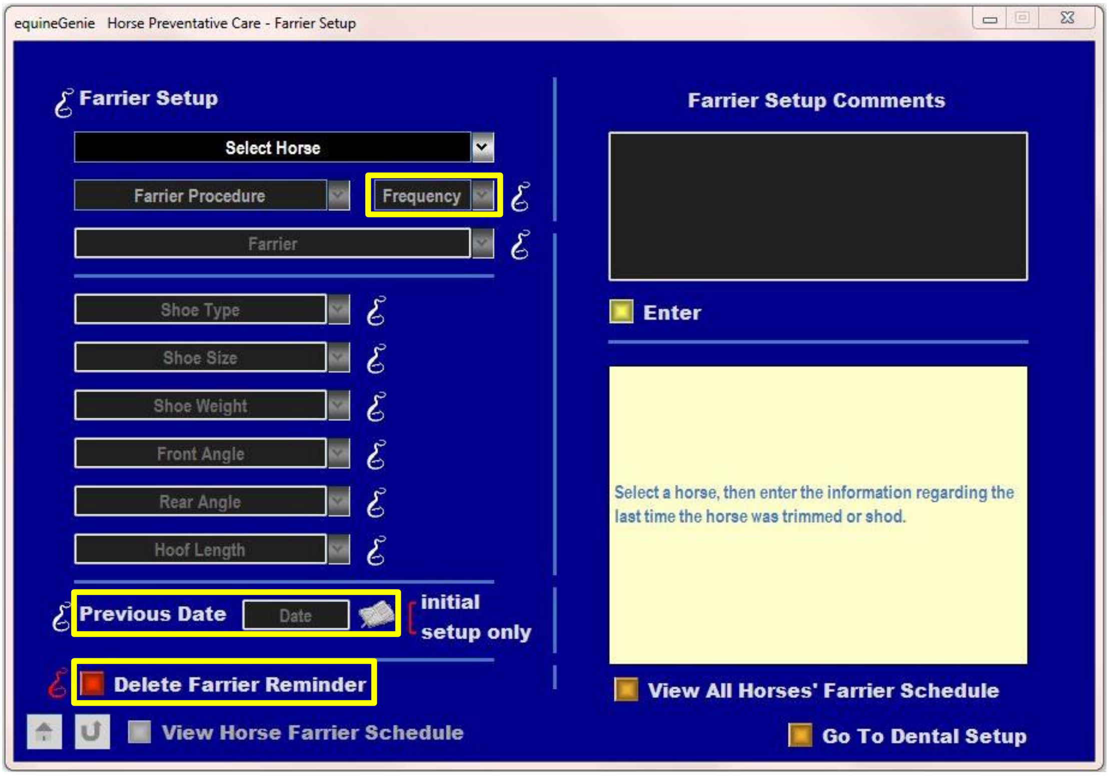


A horse's owner needs to be identified if the horse is not owned by the business. Horse ownership connects the horse to a customer for billing and invoicing. For multiple owners, enter each owner's % for automatic billing splits.



Enter the Farriers used by the business. ***Enter any Farrier specialist or Farriers assigned to specific horses.*** ***Note:*** ***Farriers entered are displayed in the appropriate Farrier dropdowns without having to be reentered.***

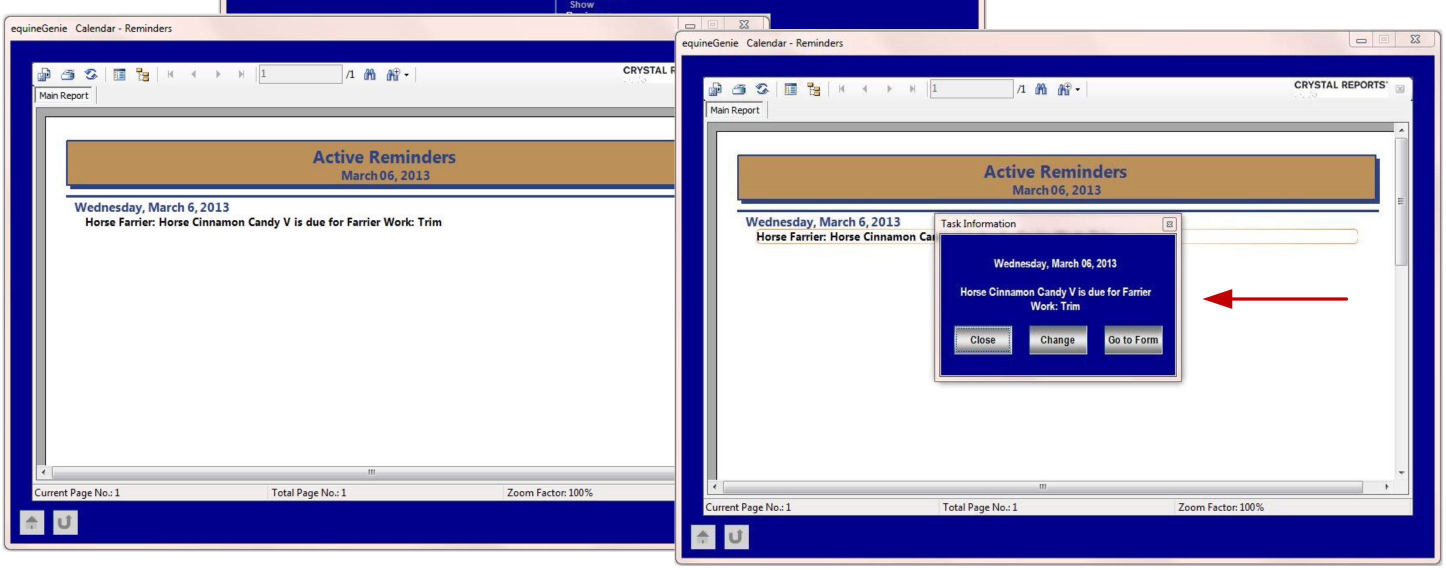
Farrier Work - Prerequisites (One-Time Setups)



Setup each horse that will have Farrier work performed. Setting the ***Farrier work frequency*** and the ***last date the work was performed will generate automatic reminders*** the next time work needs to be performed . ***Note: A reminder can be deleted if the Farrier work needs to be changed.***

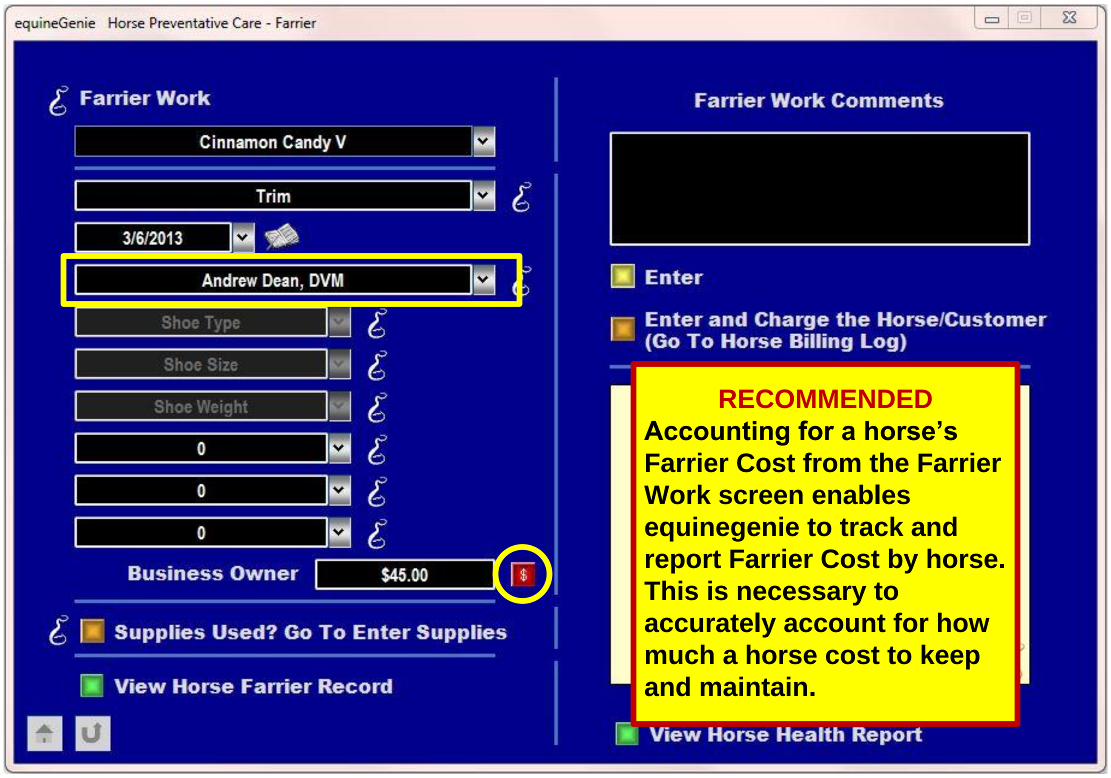
Actual Farrier Work Preformed Starts Here.

When scheduled Farrier work is due equineGenie generates an alert with a flashing **RED** Calendar on the Home Screen and Task on the Calendar / Contact screen. The Task due will be highlighted in **White**.

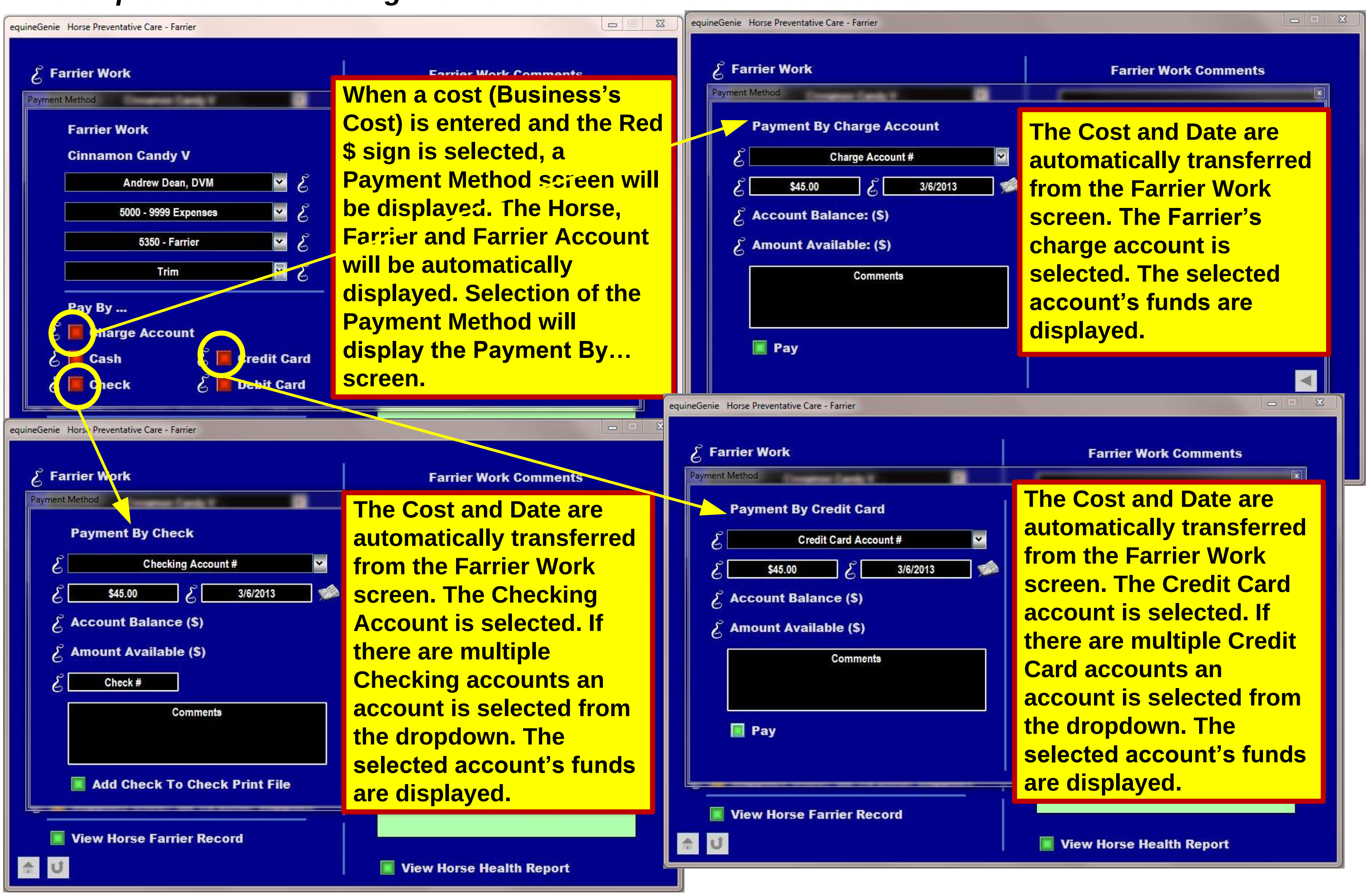


Selecting a Farrier alert will display the Reminder screen that displays what Farrier Work needs to be done. Selecting (double-click) the Reminder will display the option to ignore (**Close**), Change (M**odify / Delete**) or Execute (G**o To Farrier Screen**) the Reminder.

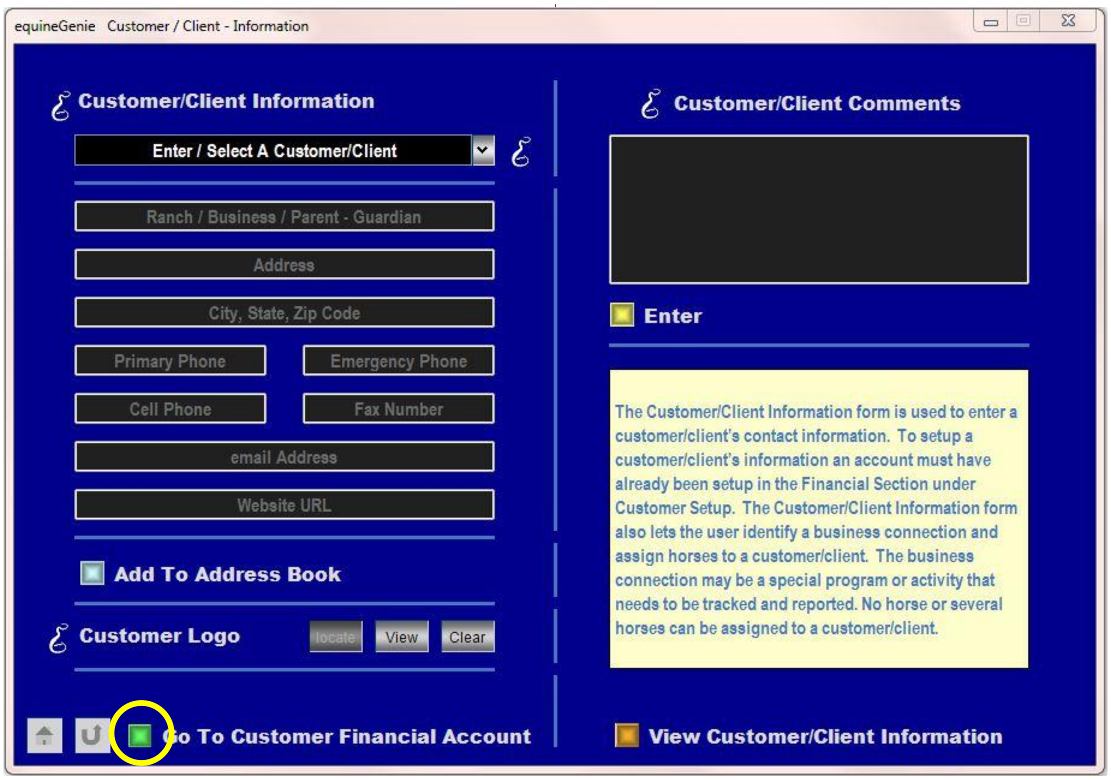
Farrier Work and Payment



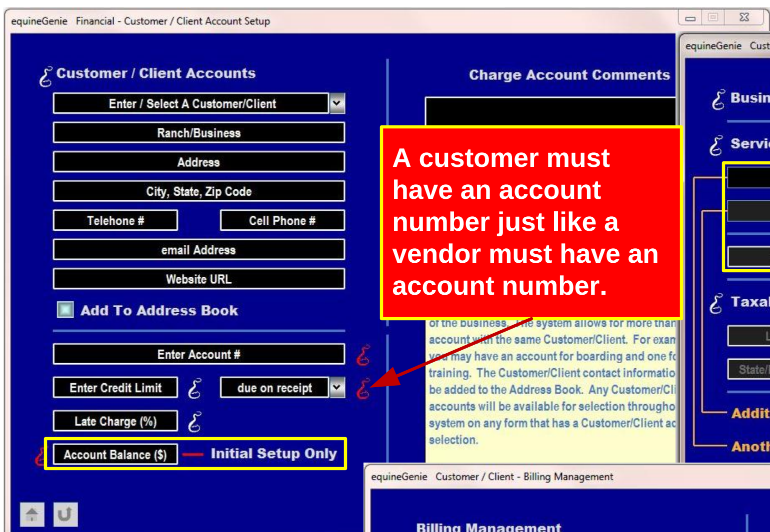
When entering the Farrier Work screen from a reminder the ***Horse***, ***Farrier Work*** to be performed, ***Date*** and ***Farrier*** will be automatically displayed. Any item transferred from the reminder screen can be changed. ***For example; if a different Farrier from the one initially identified on the Farrier Setup screen is not doing the work a new Farrier can be selected.***

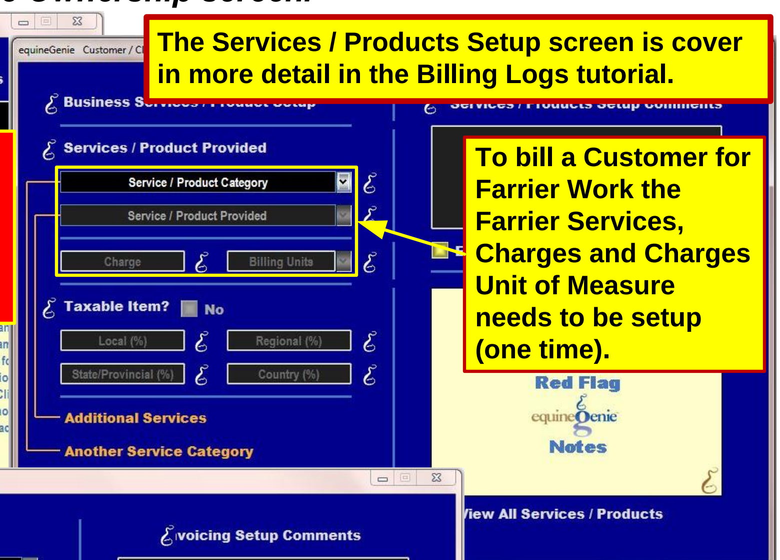


Prerequisites (One-Time Setups) for Farrier Work for a Customer

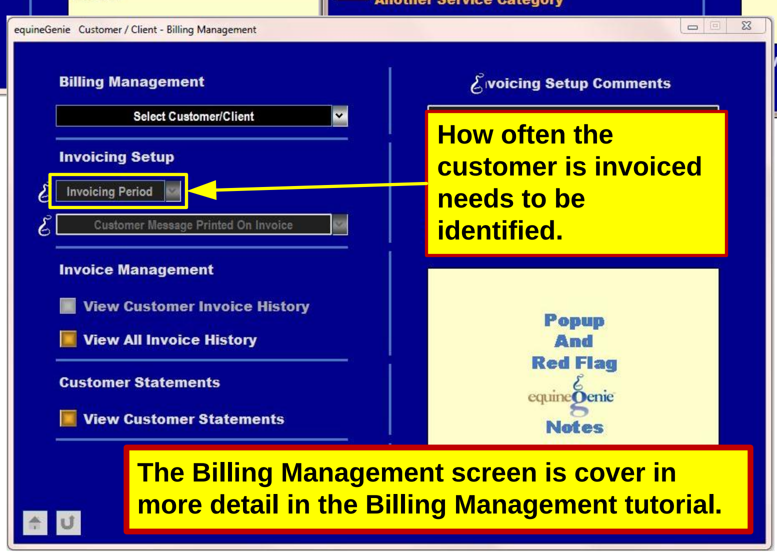


Before a Customer can be charged for Farrier Work the ***Customer's Contact and Financial information needs to be entered***. This is a one-time setup. Once a Customer has been entered it does not have to be entered again. You can go directly to the Customer Financial setup from the Customer Information setup. ***Note:*** ***A customer's information is also entered when a horse owner's information is entered on the Horse Ownership screen.***

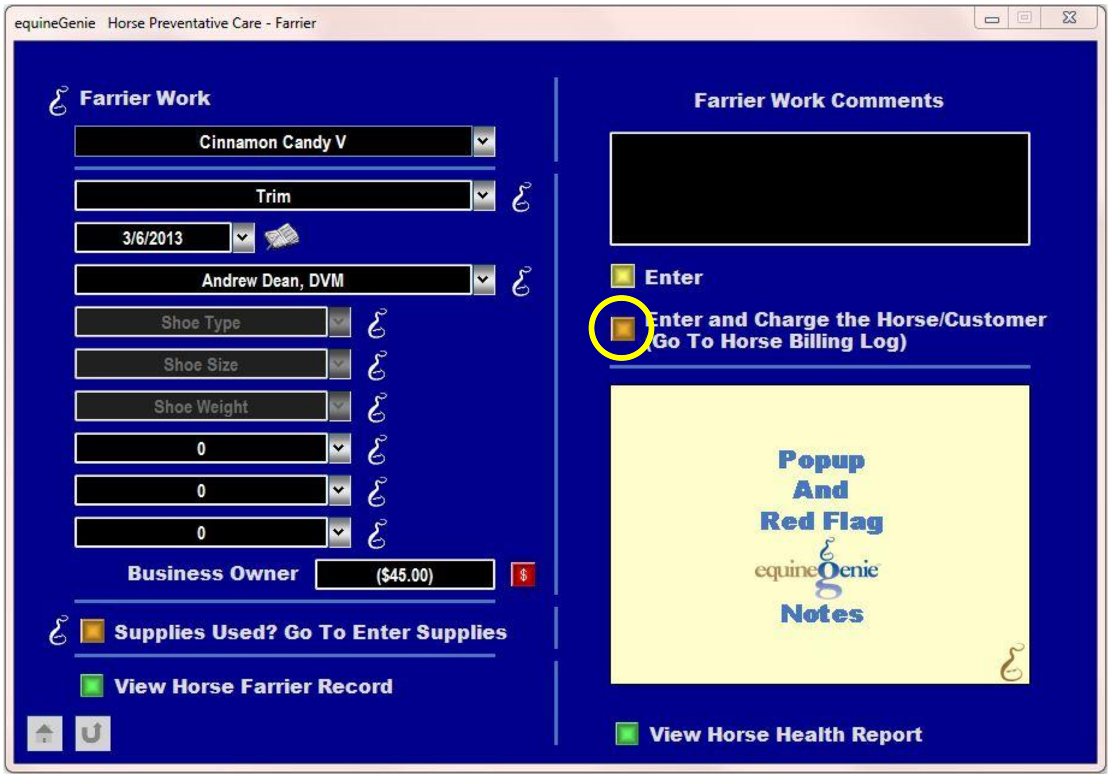




If you have an initial balance with your Customer be sure to enter that balance so that your Customer payables will track correctly. If you have no balance, enter '0'.

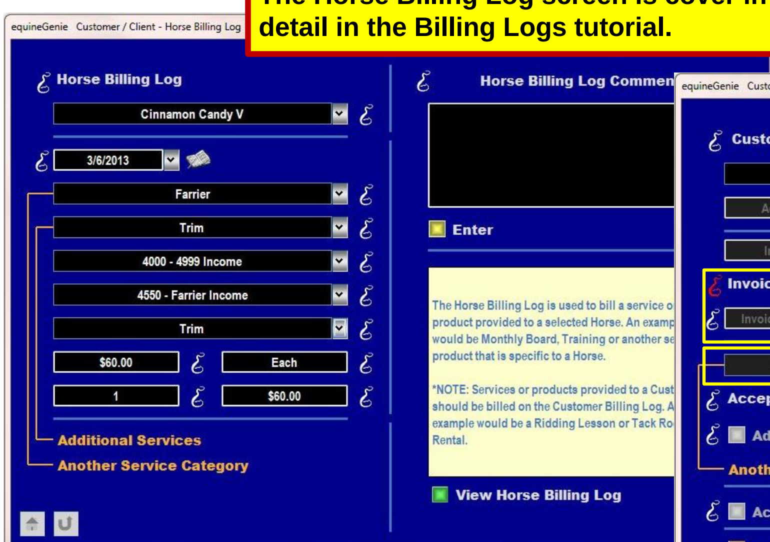


Farrier Work Billed to a Customer

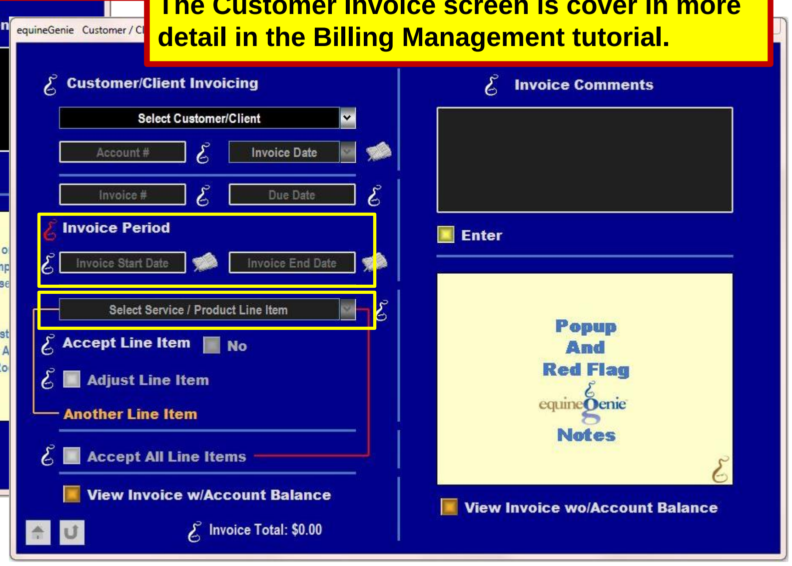


After the Farrier Worked has been billed to the business, a Customer can be billed by selecting the Orange 'Enter and Charge the Horse/Customer' button. ***Note:*** ***Do not select the Enter Button. The Farrier Work information and business cost will be automatically entered when the 'Enter and Charge the Horse/Customer' button is selected, and the Horse Billing Log will be displayed.***

The Horse Billing Log screen is cover in more detail in the Billing Logs tutorial.



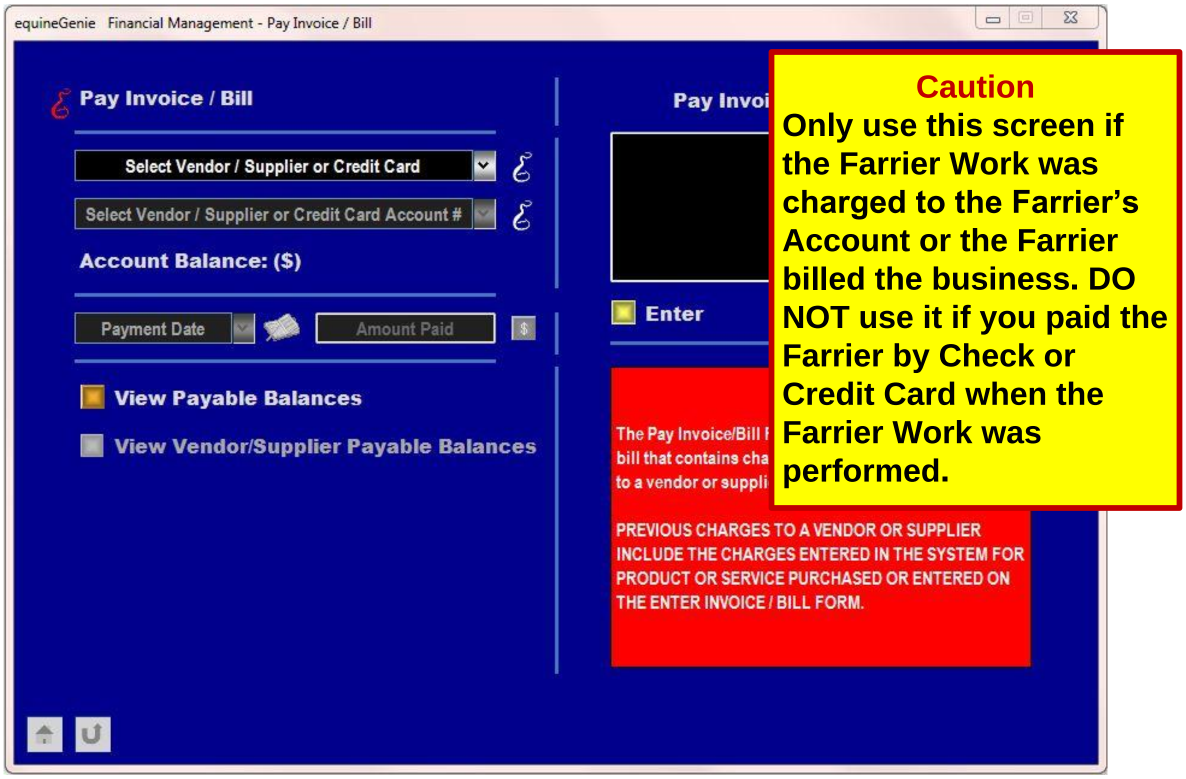
The Customer Invoice screen is cover in more detail in the Billing Management tutorial.



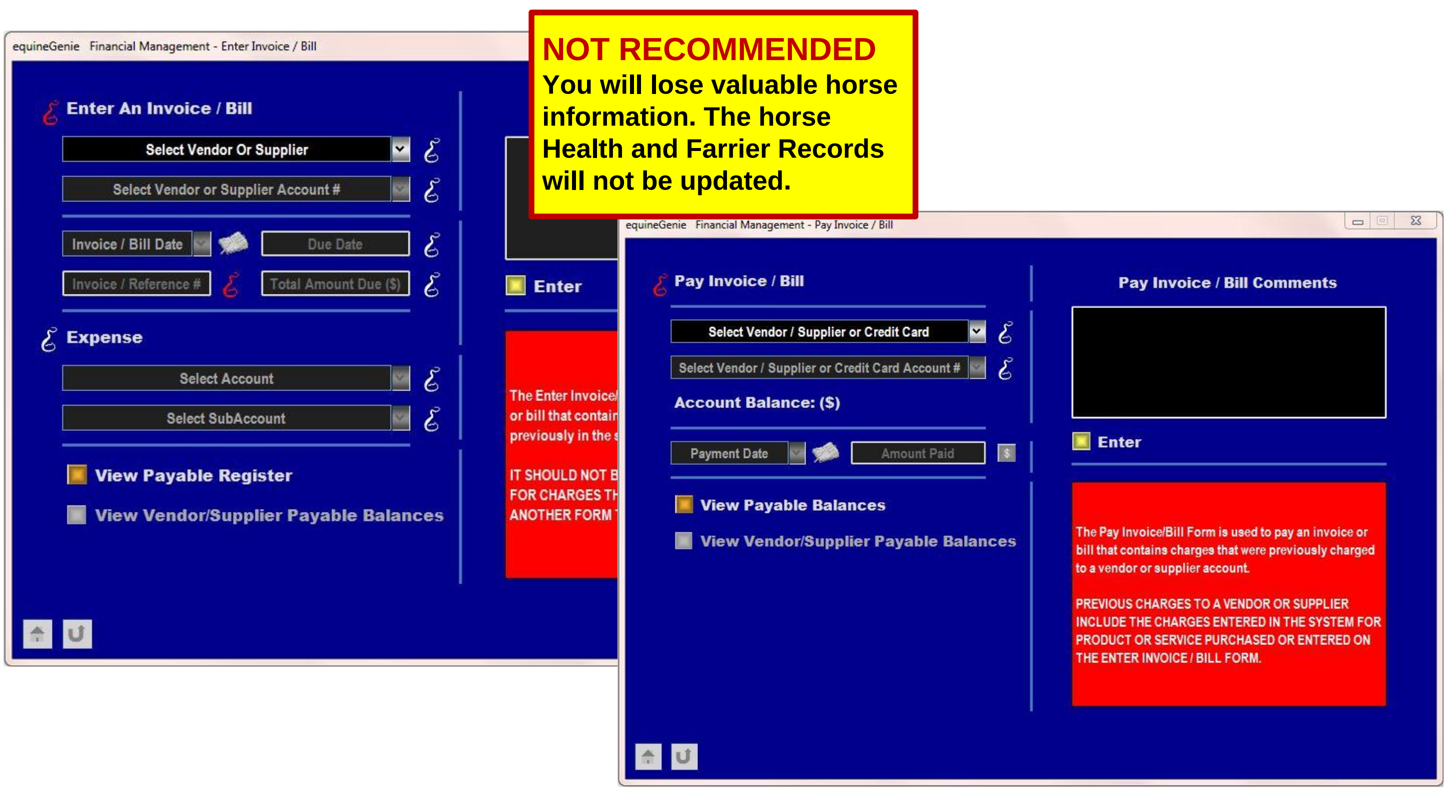
When the 'Enter and Charge the Horse/Customer' button is selected the Horse Billing Log will be automatically displayed. ***The Horse's Name and the Date the Farrier Work was performed is transferred from the Farrier Work screen.*** Completing the billing log will automatically create a line item for the horse owners invoice.

When an Invoice is created for the horse owner within ***the Invoice Period the Farrier Work was performed, a Farrier Work line item will be displayed in the 'Select Services / Product Line Item' dropdown.***

Paying a Farrier for Work Charged to Their Account

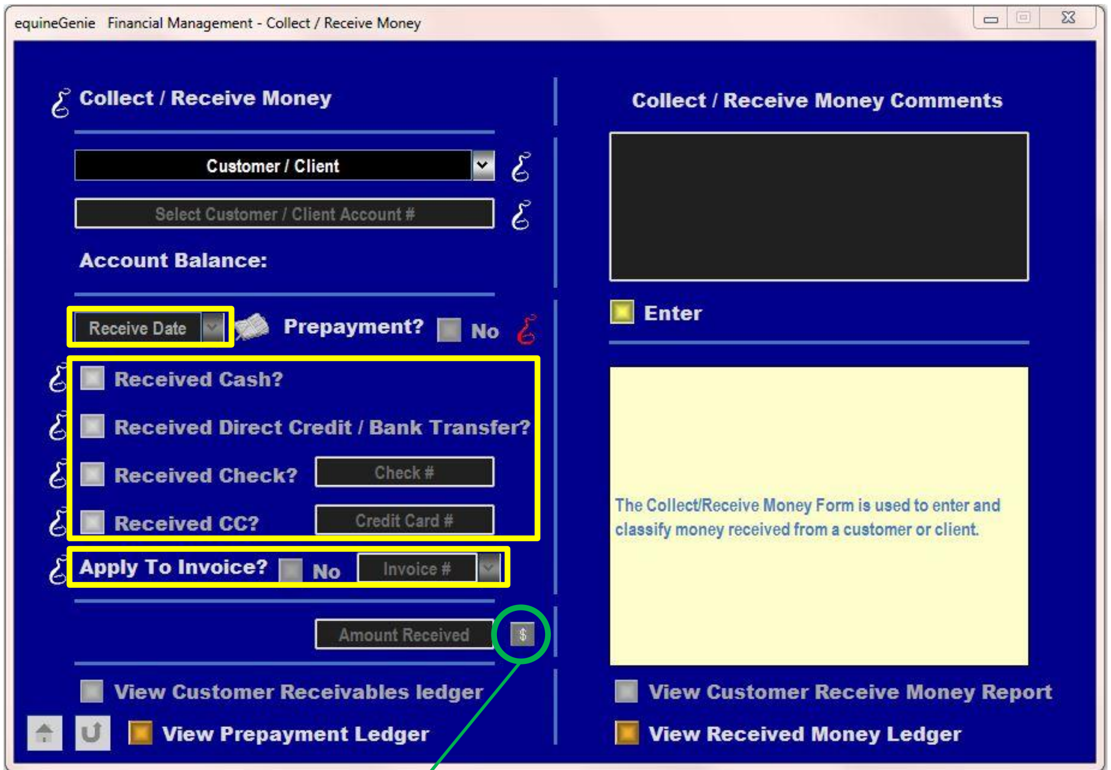


If you charged the Farrier Work to the Farrier's Charge Account use this screen to pay a Farrier's bill. You do not need to reenter the accounting information. ***Note:* *The Farrier Work cost was accounted for when the Farrier's Account was charged.***



If you do not need the horse information associated with your Farrier Work or the horse's records updated, you can enter a Farrier's Bill and pay the bill using the 'Enter Invoice / Bill' screen and 'Pay Invoice / Bill' screen. However, it is not recommended.

Receive Money from a Customer for Farrier Work



If you billed a customer for Farrier Work, enter the money you receive from a customer on the Receive Money screen. If there are several line items on an invoice and you want to receive money for each line item and account for the income in the correct account you ***select the Date, Identify the Payment Method, Apply it to the correct Invoice and deposit the funds. You do this for each line item selecting the date again each time.*** *Note:* ***DO NOT use a previously selected date even if it is the same date.***