

Equine Management Program What the program does

The information below shows what the New Program will do. You don't have to use all the Program all the time, but some parts of it will be useful to you and save you time, once you have learnt how to use it. The program works on any PC, but not on a Mac.

The program is ideal for Planning, Saving Time Invoicing, Communicating and Recording whatever your discipline.

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What to Use

Stud Yards

- Hold Details Of all Horses and People
- Keep records of Coverings & Scans
- Invoice at the click of a mouse all Livery Charges and Covering Costs
- See Past Breeding and Past Results

Look at items 1,5,7,8,9,10,11, 20 (i),(iii),(iv) & (vi), 21, 22, 23, 24, 25, 26 and 27 below if you want to know more.

Livery Yards & Riding Stables

- Hold Details of All Horses and People
- Book and record all Exercises
- Invoice at the click of a mouse all Livery Charges and Lesson Costs

Look at items 1, 2, 5, 7,8,9, 10, 11, 20 (i),(ii),(iv) & (vi), 21, 22, 23, 24, 25, 26 and 27 if you want to know more.

Racing, Eventing & other Competition Yards

- Hold details of all Horses and People
- Record all Eventing or Racing Activity (incl. Other Horses)
- Invoice at the click of a mouse All Livery Charges and Event Costs

Look at items 1, 2, 3, 4, 5, 7, 8 ,9, 10, 11, 20 (i),(ii),(iv) & (vi), 21, 22, 23, 24, 25, 26 and 27 if you want to know more.

Therapy

1. Hold details of all Horses and People
2. Record all Therapy given
3. Holds a Scan of the problem
4. Invoice at the click of a mouse all Livery and Therapy Charges

Look at items 1, 4, 5, 6, 13, 19 (i),(iv) & (v), 21, 23, 24, 25, 25 and 27 if you want to know more.

1. Horses

Horses - General

- a) Name, Stable Name, Stable/Field, Bought & Sold Dates and Prices and Date of Joining and Leaving Yard
- b) Date of Birth, Age (Calculated), Colour, Sex, Country, Type and Height (In both Hands & Cms.)
- c) Up to 4 Registration Titles and Numbers
- d) Eventing Points and Winnings
- e) Feeding – Time, Product, Quantity, No., Cost and Total Cost
- f) Notes
- g) Old Breeding to three generations and report (Can add New Horses)
- h) Past Results (Can add New Horses)
- i) Report on everything to do with the horse
- j) Include Picture of Horse
- k) Show address of owner, where you can ring up and email from
- l) Attach Letters etc, connected with the Horse and Notes of Time & Dated Telephone Calls etc.
- m) N.B. Names of Horses can be added throughout the Program, as required, but full details can only be entered here.

Livery Charges

- a) Horses with an owner and in the 'Yard' sorted by Horse or Owner (Print List for Checking Invoices)
- b) Rate, Amount, From, To and Total to be invoiced.
- c) Auto calculation of livery charges for all Horses, or calculate/adjust individually.
- d) Purchase/Sales of item for the horse, which can be invoiced (e.g. Vet, Tack. Rug Cleaning and Supplements etc.)
- e) Open form to handle Flue Vac, Worming (incl. Type), Shoeing (incl. Type), and Teeth – Dates and Costs to be invoiced with auto updating, Vaccinations & Injections for all Horses with Date & Type and Invoicing.

Horse Breeding

- a) Works for Mares & Stallions, incl. up to 9 auto scans/PD calculations and manually entered ones and estimated foaling date on entering successful Scan/PD.
- b) Past Breeding and Results – Can add new Horses to both parts of form.
- c) Holds Stud Fee and Covering Type
- d) Mare and Stallion Reports.
- e) Two fields to nominate yourself and room for Notes on Covering and Scans.
- f) Automatic Invoicing of Covering Costs
- g) Holds Scan Pictures and results
- h) Holds Vet's name re scans, with easy contact
- i) Scan Report
- j) Attach Letters etc, and Notes of Telephone Calls (Date & Time recorded) connected with the Horse and the Covering.

2. Activity Details e.g. Racing, Eventing, Jumping, Dressage etc.

- a) Select Activity
- b) Name of Activity
- c) Ballot Date
- d) Secretary/Contact Details incl. Address, Telephone, Fax, Mobile, Email, Website and Notes (Can be used to comment on the Course)
- e) Ballot Date and Activity Dates
- f) Horses attending incl. Date, Horse, Rider, Section/Race, Entry fee, Start fee, Stabling charge, Riding supplement, Points, Place, Prize and Notes (Can be used to note performance) and Distance and Weight can be used for Racing.
- g) All charges can be invoiced automatically to Owner
- h) Pop up forms allow you to contact Owner and Rider
- i) Copy details of Organiser to all other Activities of the same name
- j) Envelope to Secretary/Contact

3. Activity Planning

- a) Shows all Activities and Horses going to them
- b) Shows contact details for Secretary/Organiser
- c) Shows details of Horses going, the Date of the Section/Race and the Rider
- d) Pop up forms allow you to contact Owner and Rider
- e) Show results of an Activity and print them out (incl. Notes – See 10. above).
- f) Easy Switch to Report menu

4. Mileage Calculator

- a) Enter or Calculate Mileage to Activity
- b) Use Standard Mileage Rate (See Settings)
- c) Enter Adjustment (for number of horses going)
- d) Cost per Horse calculated and can be invoiced
- e) Select Wording to use on Invoice

5. Exercise Booking Form, By Instructor, Horse, Date and Rider

- a) Five Exercise Pages, you can switch between easily
- b) Shows Horse, Date, Instructor, Rider, Start Time, End Time, Exercise Details, Exercise Notes, Riding Rate, and Amount.
- c) Show Booking Form by Instructor, Rider, Horse or Date & Print Out
- d) Select records to Copy Exercises/Lessons from one day to another
- e) Prevents double booking of horses but as many people as you want can attend Stable Management lessons etc.
- f) Amount can be charged to Rider's Account
- g) Calculation of Charge either Time Based or Fixed
- h) Change what you want to call the Charges on the Invoice
- i) Report can be done on any Form, including Past and Future Rider and Horse Activity. Booking Reports will also show Period of Lesson, Income earned and Invoice ref.
- j) Income and period worked, totalled by Horse, Instructor, Rider and Date
- k) Stop Deletions for **Health and Safety** reasons, so you maintain a complete record of what your horses and riders are doing.
- l) Forms can be printed out between dates and exported to excel etc. Detailed Reports show Period Horse Use For, Money Earned for Period and Invoice Number, charge is added to. Amounts are totalled by Horse, Date, Rider or Instructor, depending which Report is used.

6. Therapy

- a) Five Therapy Pages, you can switch between easily
- b) Shows Horse, Date, Therapist, Start Time, End Time, Therapy Details, Therapy Notes, Therapy Rate, and Amount.
- c) Show Booking Form by Date, Horse, Therapist or Owner
- d) Select records to Copy Therapy treatment from one day to another
- e) Prevents double booking of horses.
- f) Amount can be invoiced to Owner's Account
- g) Calculation of Charge either Time Based or Fixed
- h) Change what you want to call the Charges on the Invoice
- i) Report can be done on any Form, including Past and Future Therapy
- j) Stop Deletions, so you maintain a complete record of what therapy you have given.
- k) Select Standard Therapist and see all their details
- l) Attach Scan of Problem
- m) Select Vet and see all their details
- n) Attach a Scan or photo of the problem

7. Address Book

- n) Hold all your names and addresses (as many as you want for both people, partnerships and companies – and two contact names for Partnerships and Companies. You can use it as your main address book.)
- o) Enter Category (helps when adding people to Lists by restricting selection to a Category & the Category List gives you a List by the Selected Category)
- p) Enter Date of Birth (Age calculated automatically)
- q) Telephone from the screen – You can do this throughout the Program. You can also Lock the Telephone Numbers to avoid accidental deletion.
- r) Email from the screen - You can do this throughout the Program
- s) Visit Websites from the Screen - You can do this throughout the Program
- t) Do multiple labels for the person or company (16 Sizes)
- u) Do an envelope to a person or company
- v) Export the name and address to Word or elsewhere
- w) Search by address (First Line & Town) & telephone number
- x) Add to Lists individually and in bulk
- y) Show Riding Rate for Use in Riding Schools
- z) Show what Date list & email List (s) the person is on and delete person from any List they are currently on
- aa) Show Horses owned
- bb) Attach Letters etc, connected with anyone in the Address Book and note Time & Date of Telephone Calls etc.
- cc) Open Standard Letters
- dd) Attach Pictures
- ee) N.B. Names of owners & riders can be added throughout the Program, as required, but full details can only be entered here.

8. Diary

- ff) Shows all Birthdays and Ages (if allowed by the program – see Settings below)
- gg) Record Appointments – Keep appointment diaries for as many people as you want. You will be reminded of them when Program opens. Show Date and Time started and ended, Details and Notes.
- hh) Print them for any period and for individual people or companies or for everyone.

9. Work To Do

Allows you do lists to People (or not) of things to do – These can be left, when you go away so they know what to do.

10. Invoice

- a) Select Invoice Name
- b) Add own reference to automatic one
- c) Show Header and Footer, if required, or use your own.
- d) Add Details by Date with Amount and whether VAT is to be charged
- e) Alter, if required, anything invoiced automatically
- f) VAT and Total calculated
- g) Notes
- h) Select the Order for Invoice Details to be shown in.
- i) Do an Envelope for Invoice
- j) See Owner details for telephone or email contact
- k) Change Invoice Footer details and also what various automatic entries are shown as.
- l) Print and/or Save Invoice individually or in bulk – VAT will not be shown on Invoice, if no VAT charged.
- m) Send Individual Invoices by email
- n) View Statement form for Owner/Client

11. Automatic Invoicing

Automatic Invoices allows you to invoice items from the form you are working on and adding them to the most recent unprinted invoice or, if none are available, start a new invoice to the appropriate Owner or Rider.

This can be done from:

- a) Livery Charges, Flu Vac, Worming, Shoeing, Teeth, Any Purchases for the Owner and Stud Fees from the three Horse forms
- b) Entry Charge, Stabling, Event Supplement and Rider Charge from Activity Detail Form – Prize Money can be deducted if you want.
- c) Therapy Charges from all the Therapy form
- d) Transport Charge from Mileage Calculator Form.
- e) Riding Charges from all Exercise forms

12. Communication

The program helps you communicate as follows:

- a) The selected Address can be exported from the Address Book, the Suppliers Address Book, the Address Search and the Category List
- b) By connecting your computer's telephone modem to you telephone line, with a line splitter, you can dial any telephone number from the screen. Telephone Modems can be bought and fitted to your computer if not already there – See [See Helpful Hints On The website](#)
- c) The Fax Number can be copied to another program to send a fax.
- d) Provided you use Outlook or Outlook Express, double clicking an email address will create an email. With AOL etc. the email is copied, ready to be pasted into the email, when it is created.
- e) You can make lists of anyone and use it for mail merge or labels.
- f) Email Lists allow you to do mass emailing, controlled by the system you are using as in d) above
- g) You can visit any Website by clicking it.

13. List with Dates

- e) Select List for Names
- f) Name Of List
- g) Date of List
- h) Notes about List
- i) Change a Name on List
- j) Add Names to List; Select from all Names or By Category or Individually.
- k) Show Name, Company (if Applicable), Note about the Entry, Received Date, Sent Date, Copy (mark for another List), Don't Print (if a Name is to be left off the print out this time)
- l) Copy Names from another List
- m) Do Labels (16 Sizes)
- n) Do Mail Merge for Letters
- o) Print the List, incl. Sent & Received Dates, Address, Telephone etc and Notes
- p) See Address of person on the List and telephone or email them from the pop up form
- q) Show what other Lists the person is on
- r) Prevents Duplicate Names on a List

14. List for Emails

- a) Select List for Emails
- b) Name of Email List
- c) Date of Email List
- d) Start Time of Email List
- e) Notes
- f) Open List of Emails to Select from all Names or By Category or Individually.
- g) Details of Name, Email Address, Use and Copy (To another List)
- h) Copy Names (from another List)
- i) Copy Names to the Email and open Email if using Outlook etc.
- j) Do a Report of the Email List
- k) See Address of person on the Email List and telephone or email them from the pop up form

15. Category List

a) Select Category List from Main Menu To Show:-
Names Belonging to that Category with:

- i) Home Telephone Number
- ii) Office Telephone Number
- iii) Direct Line Number
- iv) Mobile Number
- v) Notes.

The telephone numbers can be rung by double clicking them and any note can be entered.

- b) Export (to another Program) both the 1st & 2nd Salutation address.
- c) Envelope to the 1st Salutation and the 2nd Salutation.
- d) Open an Address Pop up Form to see Full Address Details, where you can telephone or email from.
- e) Print the List, incl. Address, Telephone etc and Notes

16. Suppliers

- a) Select Supplier
- b) Company Name
- c) Type of Supplier
- d) Contact Title, First Name, Initials, Last Name, Job Title, Contact Details
- e) Select Contact to use on Address Envelope etc.
- f) Attach Letters etc and record Time and Dated Notes, connected with any Supplier
- g) Address, Email, Website, Telephone and Fax
- h) Notes
- i) Select Address for Labels
- j) Do an Envelope for Supplier
- k) Export Address to Word etc.
- l) Do Labels for all selected Suppliers
- m) Report on all Suppliers

17. Products

- a) Select Product
- b) Product Name
- c) Supplier – See Supplier Details
- d) Product Quantity Name (e.g. Cwt., Bag)
- e) Quantity In Stock
- f) Product Cost
- g) Product Multiplier (e.g. No. of Units per Quantity)
- h) Product Unit Use (e.g. Scoop, Handful)
- i) Product Type (e.g. Feed, Supplement)
- j) Units Available
- k) Product Cost per Unit
- l) On Order
- m) Low Stock Level
- n) Reorder Amount
- o) StartDate/Date Product Updated to (e.g. Amount used by Horses to a date)
- p) Update Products (Updates use of all Products to Today)
- q) Report of All Products

18. Product Orders

- a) Select Supplier – See Supplier Details
- b) Date
- c) Add own reference number to automatic one
- d) Show Header
- e) Show Footer
- f) Add Low Stock Items for this Supplier
- g) Open Product List to add any Product
- h) Delete a Product

- i) Product Details, Quantity, No. Ordered, Cost, Total, whether VAT applied
- j) Sub Total, VAT, Total Order (VAT not shown on Print Out
- k) Notes
- l) Do Envelope to Supplier
- m) Order Details (For Footer)
- n) Save & Print or Save only
- o) Send by email if you want

19. Order Deliveries

- a) Cancel & Transfer Balance of Order
- b) Cancel Balance of Order
- c) Enter alternative Supplier for transferred Order
- d) Date Received
- e) List of Orders Outstanding – Order Ref., Order Date, Product, Supplier, O.K.(Update Stock if everything received, price right and date entered correctly), Quantity Unit (If Part Order received), Part Orders already received, Balance Outstanding, Delivery Date.

20. Maintenance

i) Livery Rates

- a) Invoice Name for Livery Rate
- b) Note of Livery Rate for selection on Horse Form
- c) Daily/Weekly Amount of Livery Rate – Can be different for different horses.

ii) Riding Rates

- a) Name of Rider Rate
- b) Hourly Amount of Rider Rate

iii) Scans

- b) Number of Scans
- c) Period of Scans

iv) Shoe Type

- a) Name of Shoe
- b) Notes on Shoe
- c) Cost of Shoes

v) Therapy

- o) Name Of Therapy
- p) Rate of Therapy
- q) Note of Therapy Rate

vi) Wormer Type

- a) Name of Wormer
- b) Note about Wormer
- c) Cost of Wormer

21. VAT Rates

- a) Name of Rate
- b) VAT Amount
- c) VAT Code

22. Settings

- a) Your name (This and your address will be used for invoicing etc)
- b) Any pre-dial number you use to get a line
- c) Your own telephone number
- d) Your Mileage Rate for charging out your transport
- e) Flue Vaccination – period between and warning required of
- f) Worming - period between and warning required of
- g) Shoeing - period between and warning required of
- h) Teeth Rasping - period between and warning required of
- i) Vaccinations & Injection warning required of
- j) The month you wish the ages of your horses to be based on, if you don't know the actual foaling date.
- k) Ballot Warning – The period before you want to be warned of Ballot Dates
- l) Activity Warning - The period before you want to be warned of Activity Dates
- m) Scan Warning – The period before and after you want to be warned about Scans
- n) Invoices – Your Invoice Date (e.g. 1st of month) and warning required.
- o) Last Invoice Date (Automatic reminder of last invoice Date)
- p) Appointments and Diary Entries – warning required
- q) Menu and Report Titles:
 - i) Activity Details (e.g. Event Details, Show Jumping, Racing etc.- This also shows on the Reports for the overall Activity)
 - ii) Activity Planning (e.g. Event Planning, Show Planning, Racing etc.)
 - iii) Exercise (e.g. Exercise, Schooling, Teaching, Horse Activity)
 - iv) Report Header – What you want to show on Report Menu for the individual activity e.g. Section, Class or Race
- r) Address Book:
 - i) Form of Single Title (Mr. or Esq.)
 - ii) Initials or First Name (What you want to show in Address Salutation)
 - iii) Method of Selecting People (By First & Last Name, By Last and First Name or by both)

- iv) Email System (either Outlook/Outlook Express or AOL etc.)
- s) Invoice Header – Whether you want to use the inbuilt Header or use your own headed paper
- t) Invoice Footer – Whether you want to use the inbuilt Footer or use your own headed paper
- u) Whether Livery Charges are by the Day or the Week
- v) Standard Livery Charge for bulk invoicing
- w) Exercise Delete Period – You can select how long you want to keep your Exercise Records for, by stopping Deleting for a period between 0 and 12 months. This is useful for Health and Safety.
- x) Proper Case - The Program puts the first letter in Uppercase and subsequent ones in lower case. This facility can be turned off.
- y) Set period between Data Backups
- z) Mileage Wording - You can show what you want when charging mileage (e.g. Event Expenses, Transport etc)
- aa) Activity Rider - Again you can show what you want here on the invoice (e.g. Rider's Expenses, Jockey's Expenses etc.)
- ab) Riding Fee Wording - This can be shown as Hacking, Riding, Lesson etc.
- ac) Select Modem used on your computer
- ad) Enter and Change Password
- ae) The Number of Years beyond which you wish to exclude the age calculation.

23. Report Menu

- a) A list box shows the following Reports and Forms:
 - Activities - Report On A Horse
 - Activities - Report By All Horses
 - Activities - Report On An Event
 - Activities - Report Of All Events
 - Activities - Report On A Owner
 - Activities - Report By All Owners
 - Activities - Report On A Rider
 - Activities - Report On All Riders
 - Feeding - Report Of All Horses' Feeding
 - Show All Invoices
 - Show All Orders
 - Show Livery Accounts
 - Show Riding Rates
 - Show Therapy
 - Show Owner's Accounts

When the report is clicked the appropriate fields to be completed will open

By entering a Start Month, you can obtain the Vat period and then see:

- a)VAT Sales Report
- b)VAT Purchases Report

These are based in Invoices and Orders printed for the period, but Purchases should be based on Invoices received,

24. Archiving

Archive Invoices and Payments that have been reconciled.
Archive Orders that have been received

25. Back Up Data

Back up your date frequently to disk or another part of your computer.

26. Easy Address Book Entry

This allows you to enter the majority of your Address Book data, using a straight line approach as in Excel.

27. Export Information

Export Your Program Settings and the Address Book Data, Suppliers, Appointments, All Horses, All Invoices, All Orders, Current Invoice, Current Order, Current Date List, Current Email List and Current Things to do to Excel, Word, HTML, Notepad or csv formats.

When Previewing any Report, this can be Printed or Exported to Word, Excel or Notepad and, depending on how your computer is set up, HTML or Email.

28. Reminders

When you open the Program you will be reminded of various items, depending on the time set in the Settings menu:

- a) Invoice Date warning
- b) Ballot Date warning
- c) Activity Date warning
- d) Future Birthdays
- e) Appointments in the Diary
- f) Scan Warning
- g) Shoe Warning
- h) Flu Vac Warning
- i) Wormer Warning
- j) Vaccination and Injection Warning
- k) Low Stock, including Auto Ordering
- l) Backing Up Your Data

29. Search Address

You can search your address Book by Town, County or Part of Post Code and see everyone in that area, who you can then contact, do an envelope to or export the address of someone or company to another program.

30. Statements

You can do statements for your Owners/Clients, which show:

- a) Invoices raised – Invoice No. Date amount, Printed and paid
-Details viewed by clicking Invoice No.
- b) Payments Received, by Date, Method and Amount
- c) Any Archived Amount and Allocated
- d) Total for Invoice and payments and Balance.
- e) Print by Allocated Amounts and Statements – Archived
Amounts will not be shown if nothing Archived.
- f) either plain Invoice or on 2 pages with aging debt invoice

31. Pop Up Address Form

Throughout the program the Name Address and other details of a Rider or Owner are only a double click away. You can then email or telephone from the pop up screen.

32. On Line Help

There is on line help throughout the Program and various popup forms will show, on opening the Program, to remind you of things to do. There are also tool tips on the screen if you hover the mouse over them.

33. Review Updates

On the opening screen there is a link to the Equine Management Program of the website, where you can see if you need to update your Program. You will be informed when updates are available.

In Addition you can put a logo or picture on the opening g screen and see the Program Readme Notes

34. Colour Change

If you don't like the background Colour of the program, you can now change it to one of the 40 colours available.

35. Telephone Log

Any telephone you make will be logged with the name called and the number and a note can be written against it.

36. Development

The Program can be developed to your personal requirements (e.g. Individual passwords for different parts of the Program etc.).

The cost would be £25 an hour or by negotiation.