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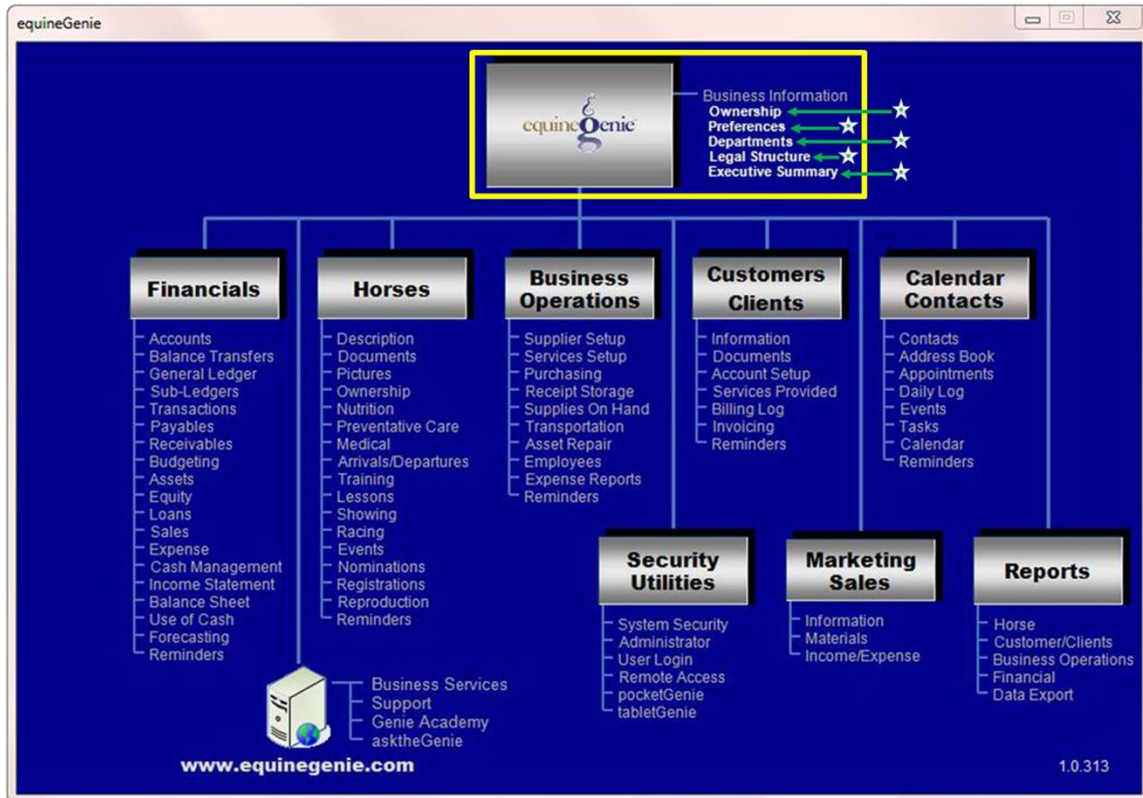
Business Information – Ownership

Path: Home: Business Information: Ownership

There are no prerequisite setups.

Think/Plan about how you want to setup your business's ownership and any business partners.

Warning: Do not enter customers, clients, suppliers, vendors or anyone else except the business owner(s) or partner(s) on this screen.

① **To Enter** the business Owner, select [New Owner/Partner] from the Owner / Partner Name dropdown, click in the dropdown box and enter the Owner / Partner name.

Note (1): The name entered should be the legal owner and/or partner of the business. **It should not be the name of the business unless they are the same**.

② **You can remove** an owner or partner by displaying the owner or partner and then selecting the '**Red**' Remove Business Owner / Partner button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the owner or partner.

③ **Enter** the name of the business's farm or ranch in the Business / Farm or Ranch Name box.

Hint: Entering the Farm or Ranch Name is important because the name is on your business reports. The business name is an important part in promoting your business and establishing its brand in the markets in which it competes.
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④ **Enter** the business contact information.

Note (1): If you do not have the owner or partner information for a particular text box you can leave it blank. If you want to complete the screen at a later date you select the owner or partner name and enter any additional information.

⑤ **A Business Logo can be added** to equineGenie by selecting the Locate button to locate the logo's image file. Opening the image file will automatically add it to equineGenie. Selecting the View button allows you to view the logo. Selecting the Clear button will remove the logo. The logo will appear on all your business's reports.

Note (2): A logo needs to have a 1:1 aspect ratio (width measurement equals the height measurement). This means the logo needs to be a 1 x 1, 2 x 2 or any other size as long as the aspect ratio is 1:1.

If your logo does not have a 1:1 aspect ratio email it to, info@genieatwork.com, and a GenieCo customer care representative will proportion your logo to the required ratio.

⑥ After you have entered the business owner, if there is another owner or partner you can select the **orange Another Owner / Partner**. The previous owner or partner information will be entered, and then cleared.

⑦ **Select Enter before leaving the Business Owner – Information screen.**

⑧ **Selecting** the 'Go To Owner Preferences' will display the Business Owner – Preferences screen.

❶ **Selecting** the '*View Business Owner Information'* will enable the business owner's information to be viewed, exported and/or printed.

Note (3): The business owner screen must have the business owner displayed to view the business owner's information.

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Business Information – Preferences

Path: Home: Business Information: Preferences

There are no prerequisite setups.

Think/Plan before you select the business's preferences. Make sure you are selecting the correct measurement system that matches your purchases, consumption and inventory unit of measure. Make sure you are selecting the correct currency symbol you want on all your reports that contain financial information.

① **Select** the measurement system you use in your business. Selection of the measurement system must match the purchase, consumption and inventory units of measure.

Note (1): The business's measurement system must be identified before any unit of measure transactions can be completed in equineGenie.

② **Select** the currency symbol you will use on all your reports that include financial data.

Note (2): The equineGenie report writer, crystal reports, does not pick up the windows operating system currency format selection.

③ equineGenie uses the 12 hour time format and the Month/Day/ Year date format.

Note (3): The equineGenie report writer, crystal reports, does not pick up the windows operating system date format selection

④ **Enter** the Asset Minimum Capitalization value in the Value text box. The Asset Minimum Capitalization value is checked whenever a purchase is designated to be used longer than one year. If the purchase is designated to be used longer than one year and the cost of the purchase is equal to or greater than the Asset Minimum Capitalization value the '*Go To Add Asset*' button is activated on the *Business Operations – Purchases screen.* Selection of the button will display the *Financial Setup – Fixed Asset screen.*

Note (1): If you do not know what your Asset Minimum Capitalization value should be check with the proper tax authority or your account.

⑤ **Select Enter before leaving the Business Owner – Preferences screen.**

⑥ **Selecting** the '*Go To Business Legal Structure*' will display the Business Owner – Legal Structure screen.

⑦ **Selecting** the '*Go To Owner Information*' will display the Business Owner – Information screen.

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Business Information – Departments

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There are no prerequisite setups.

Think/Plan before you setup your business into department. equineGenie allows for income and expense to be tracked by department. Make sure the department you are setting up adds value to managing your business. Besides tracking income and expense; horses, vehicles and employees can be allocated to a department.

Expenses and income can be assigned to a department in total, or the expense or income can be split between departments. If an expense or income is split between departments the splits have to be calculated manually.
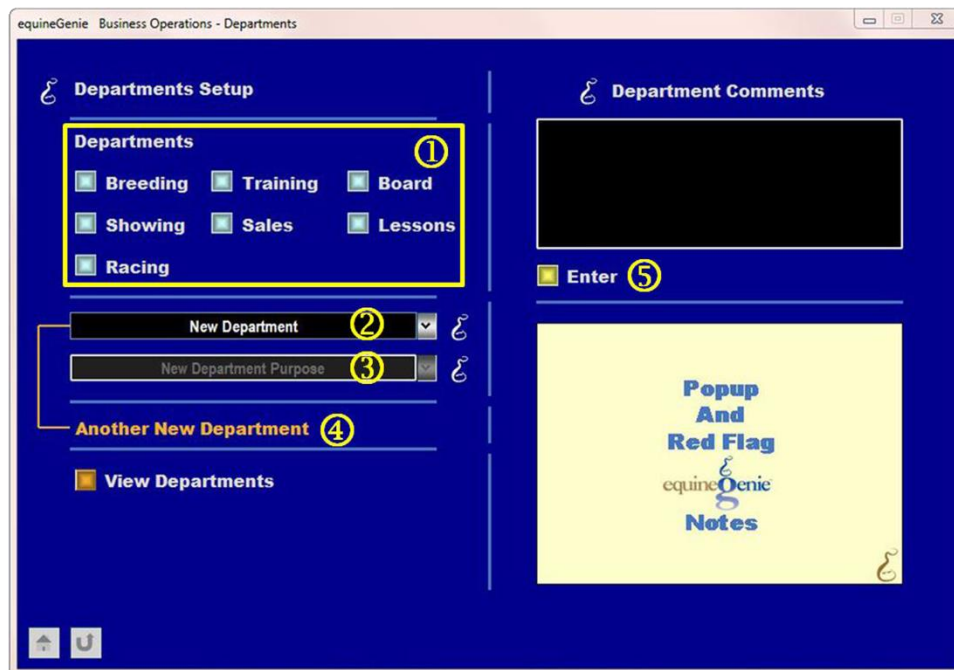
① You can **Select** one or more departments in the standard list by 'clicking' on the desired button.

② If the desired department is not available you can **Enter** a department by selecting [New department] from the New Department dropdown, clicking in the dropdown box and entering the new department name.

Note (1): if a new department is entered it is remembered by equineGenie and made available in all department dropdown lists throughout equineGenie.

③ You can **Identify** a new departments purpose for your records by clicking in the New Department Purpose dropdown and entering the purpose.

④ If more than one new department is needed, **Select** the **orange Another New Department**. The previous department entered will saved and cleared so another new department can be entered following the instructions in ③.

⑤ **Select Enter before leaving the Business Owner – Departments screen.**

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Business Information – Legal Structure

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There are no prerequisite setups.

Think/Plan before you setup your business legal structure. equineGenie used your legal entity to establish the business's balance sheet equity accounts.

① Enter your business's legal name in the Business legal Name box.

Note (1): equinegenie does not use the business's legal name anywhere in the system. Therefore, entering it is optional and only for your records.

② Select the business's legal entity from the Type of Legal Entity dropdown.

Note (2): The legal entity selected is used by equineGenie to establish the equity accounts on the business's balance sheet.

③ Enter your business's tax identification number in the Business Tax ID # box.

Note (3): equinegenie does not use the business's tax ID # anywhere in the system. Therefore, entering it is optional and only for your records.

⑤ **Select Enter before leaving the Business Owner – Legal Structure screen.**

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Business Information – Executive Summary

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There are no prerequisite setups.

The Executive Summary screen gives you access to all the business's reports without having to enter any other screens.

There are more than 500 reports available in equineGenie. If your business requires a report that is not in equineGenie the report can be generated as long as the report's required information already exists within equineGenie.

① Provides access all the horse reports.

② Provides access all the customer reports.

③ Provides access all the business operations reports.

④ Provides access all the financial reports.