

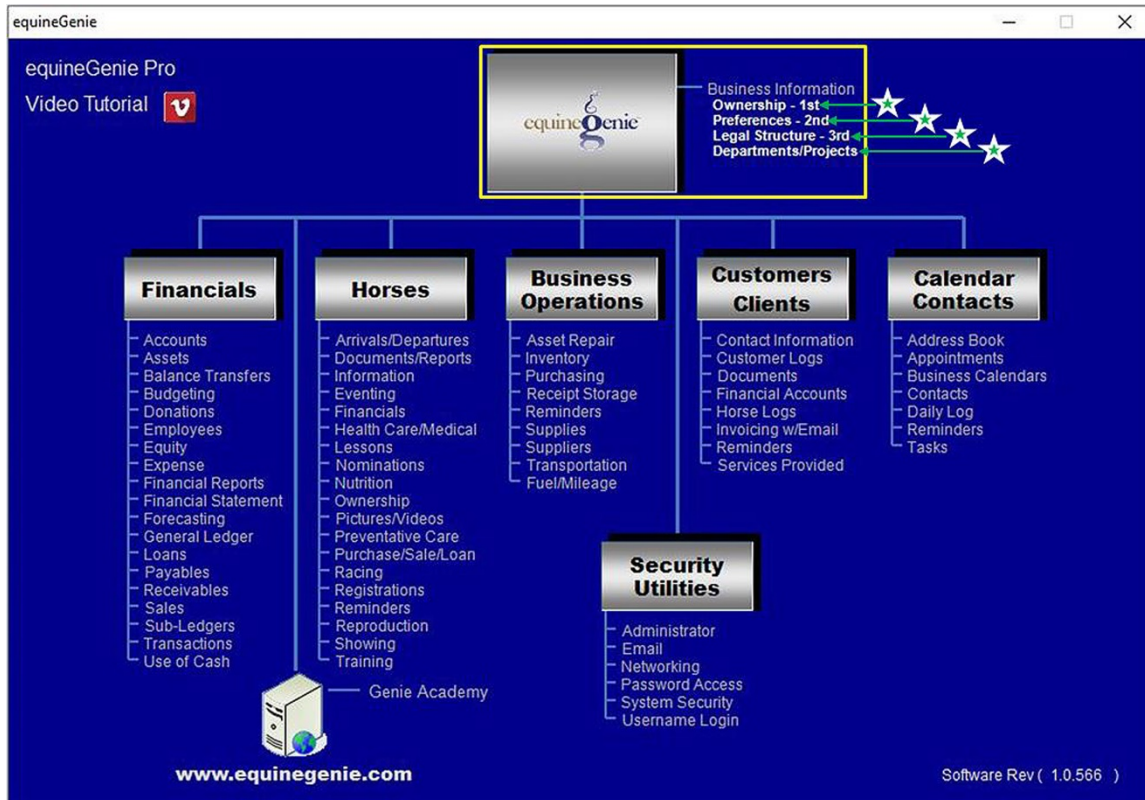


**Business Information**  
**Ownership**  
**Preferences**  
**Legal Structure**  
**Departments/Projects**

# Business Information Setup

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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. The Business Owner Information is required before you can assign horse ownership and for your remit address on a customer invoice.***

- 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.


**Notice:** *It should not be the name of the business unless they are the same. If the business is owned by spouses, then we suggest the owner would be both as one owner.*

**Example:** John & Jane Doe; ownership percentage 100%.

- ② **If there** is more than one owner, **enter** each owner's percentage of ownership. See **Example**.
- ③ **Enter** the name of the business's farm or ranch in the Business / Farm or Ranch Name box.

**Note 2:** Entering the Farm or Ranch Name is important. '1' Your farm or ranch name is on all your business reports. '2' Your farm or ranch name is the Remit Payment to: name on your customer invoices.

### Invoice Remit Payment to: Example

<div style="border: 2px solid black; border-radius: 15px; display: inline-block; padding: 5px 20px; font-weight: bold; font-size: 1.2em;">Invoice</div>																	
<p><b>Remit Payment to:</b></p> <p><b>Make Believe Ranch</b> ← Farm or Ranch Business Name</p> <p>1234 Some Road SomePlace, ST 99999 Phone: 999.999.9999 info@makebelieve.com</p>																	
<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td colspan="2" style="padding: 5px;"><b>Bill Smith</b></td><td colspan="2" style="padding: 5px;"><b>Horse Haven Ranch</b></td></tr><tr><td colspan="2" style="padding: 5px;">1234 WCR 39-75 Somewhere, ST 99999</td><td colspan="2" style="padding: 5px;"></td></tr><tr><td style="padding: 5px;">Phone: 777.777.7777</td><td style="padding: 5px;">Mobile: 678.987.6543</td><td style="padding: 5px;">Emergency: 912.912.1212</td><td style="padding: 5px;">Fax: none</td></tr><tr><td colspan="4" style="padding: 5px;">info@horsehaven.com</td></tr></table>		<b>Bill Smith</b>		<b>Horse Haven Ranch</b>		1234 WCR 39-75 Somewhere, ST 99999				Phone: 777.777.7777	Mobile: 678.987.6543	Emergency: 912.912.1212	Fax: none	info@horsehaven.com			
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info@horsehaven.com																	

'3' Your business name is an important part in promoting your business and establishing its brand in the markets in which it competes.

④ **Enter** the business contact information.

**Note 3:** 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. *Your business contact information is on all customer invoices. Accuracy is important!*

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 and customer invoices.

**Note 3: 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 (square).

*If your logo does not have a 1:1 aspect ratio it will appear distorted on all your reports and customer invoices. If it appears distorted, it can be fixed! Email it to, [info@genieatwork.com](mailto:info@genieatwork.com), and a GenieCo customer care representative will proportion your logo to the required ratio without being distorted.*

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 **Enter** any comments or notes associated with the business owner information setup.

⑧ **Select Enter before leaving the Business Owner – Information screen.**

① **Selecting** the '*View Business Owner Information*' button will enable the business owner's information to be viewed, exported and/or printed.

**Note 4:** The business owner screen must have the business owner displayed to view the business owner's information.

② **Selecting** the '*Go To Owner Preferences*' button will display the '*Business Owner – Preferences*' screen.

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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. Selection of currency symbol 'None' will result in no currency symbol being displayed.

The currency symbol can be changed to invoice a customer in a different currency and then changed back to the businesses currency.

**For Example:** If you are training a customer's horse who resides in a European country whose currency is in Euro, you can change the currency symbol to the Euro, invoice your customer and then, change the currency symbol back to your country's currency.

- 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.

**Note 4:** *The 'Asset Capitalization Minimum' 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 its cost is equal to or greater than the 'Asset Capitalization Minimum' 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. The purchase information is transferred to the 'Financial Setup – Fixed Asset' screen where the fixed asset is entered to be capitalized and depreciated.*

**Caution:** If you do not know what your Asset Minimum Capitalization value should be, check with the proper tax authority or your accountant.

**Suggestion:** Generally, the rules for determining whether or not an asset is capitalized are based on if the asset will have a useful life that is greater than one year and the cost of the asset is above a threshold that is set by the business. For example, a small business might set a threshold of **\$500**.

- ⑤ **Enter** any comments or notes associated with the business owner preferences setup.

- ⑥ **Select Enter before leaving the Business Owner – Preferences screen.**

- ① **Selecting** the 'Go To Owner Information' button will display the 'Business Owner – Information' screen.

- ② **Selecting** the 'Go To Business Legal Structure' button will display the 'Business Owner – Legal Structure' screen.

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## Business Information – Legal Structure

Path: Home: Business Information: Legal Structure

***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.***

equineGenie Business Owner - Legal Structure

**Business Legal Structure (Setup 3rd)**

Business Legal Name (1)

Type Of Legal Entity (2)

Business Tax ID # (3)

\*equineGenie uses the Legal Entity to establish the Equity Structure of the Business's Balance Sheet.\*

\*equineGenie does not store the 'Business Legal Name' or the 'Business Tax ID#'. They are entered for the business's benefit only.\*

View Business Legal Information (1)

Go To Owner Information (2)

Go To Owner Preferences (3)

**Legal Structure Comments**

Enter (5)

Video Tutorial

Popup And Red Flag equineGenie Notes

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.

④ Enter any comments or notes associated with the business owner legal structure setup.

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

- ① **Selecting** the '*View Business Owner Information*' button will enable the business owner's legal information to be viewed, exported and/or printed.
- ② **Selecting** the '*Go To Owner Information*' button will display the '*Business Owner – Information*' screen.
- ③ **Selecting** the '*Go To Owner Preferences*' button will display the '*Business Owner – Preferences*' screen.

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## Business Information – Departments/Projects

Path: Home: Business Information: Departments/Projects

***There are no prerequisite setups.***

***Think/Plan before you setup your business into department or assign projects. equineGenie allows for income and expense to be tracked by department and the expenses tracked by project. Make sure the department or project 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 need to be manually calculated. Expenses are assigned to a project in total.***

The screenshot shows the 'equineGenie - Departments - Projects' window. On the left, under 'Departments - Projects Setup', there is a list of departments: Breeding, Training, Board, Showing, Sales, Lessons, and Racing, each with a checkbox. Below this is a dropdown for 'New Department or Project' (labeled 2), a dropdown for 'New Department or Project Purpose' (labeled 3), a 'Project?' checkbox (labeled 4), and a 'Remove Selected Department/Project' button (labeled 6). A note states: '\*equineGenie remembers added departments and projects. You can manage a department's income and expense or a project's expense. Department income and project expense statements are available in the Financial Reports - Departments/Projects.\*'. On the right, under 'Department and Project Comments', there is a large text area (labeled 7), an 'Enter' button (labeled 8), a 'Video Tutorial' link, and a 'Popup And Red Flag' button. A legend at the bottom right shows icons for 'View Departments' (labeled 1) and 'View Projects' (labeled 2).

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/Project] from the New Department or Project dropdown, clicking in the dropdown box and entering the new department or project name.

**Note 1:** if a new department or project is entered, it is remembered by equineGenie and made available in all department/project dropdown lists throughout equineGenie.

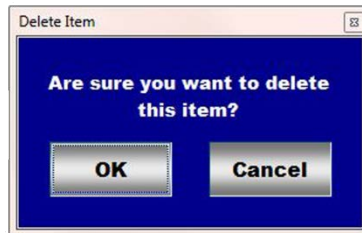
③ **You can Identify** a new department's or project's purpose for your records by clicking in the New Department or Project Purpose dropdown and entering the purpose.

④ If the entry in the New Department or Project dropdown is a project, **Select** the 'Project?' button changing it from a **Red, 'No'** to a **Green, 'Yes'**.

**Note 2:** The 'Project?' button enables equineGenie to distinguish a department entry from a project entry and designate financial transactions to the correct project.

⑤ If more than one new department or project is needed, **Select** the **orange Another New Department or Project**. The previous department or project entered will be saved and cleared so another new department or project can be entered. See ②, ③ and ④ above.

⑥ If you need to delete a department or project, it can be deleted by displaying the department or project setup and selecting the **Red Remove Selected Department/Project** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the department or project.



After selecting **OK** on the **Delete Item** popup you need to select the **Enter** ⑦ button.

⑦ **Enter** any comments or notes associated with the departments/projects setup.

⑧ **Select Enter before leaving the Business Owner – Departments screen.**

① **Selecting** the 'View Departments' button will enable the department information to be viewed, exported and/or printed.

② **Selecting** the 'View Projects' button will enable the project information to be viewed, exported and/or printed.

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