

## GETTING STARTED

### DATABASES

**The PRACTICE database** HiMARK\$ evaluation comes with a practice database or practice information. The purpose of this database is to allow you to use the data in it to train yourself and others, and to get a good feel for the program before investing time and real information in the system. Once you are comfortable with the system using the PRACTICE DATABASE - MY RANCH, you will want to create your own database for your business. The information you provide for this database is permanent and will be the foundation for establishing your business records. This information will not be lost at the end of the evaluation period. Once you purchase the system, we will unlock you and you are free to continue where you left off. If you do not wish to set up your own database and password by yourself, call us. We will help you through the process.

**CREATE YOUR OWN DATABASE** To create your personal database:

Click **File** ==> **Database New/Open**.

Press **F1** to access the window-level online Help for the Database Maintenance window. The default DIRECTORY folder, where your database is stored, is: C:\ProgramFiles\HiMARKS\DBs but you may assign the database to another folder in your system Directory if you wish.

### NAVIGATION TOOLBAR

Several windows in HiMARKS use what is referred to as the "Database Navigation Toolbar." These standard buttons function the same way on each window. The database navigation toolbar is used to navigate through a database table and to add, edit or delete database table records. Following is a description of what each of the buttons on the toolbar does.



**First** Click **First** to access the first record in the database. The record that is "first" in the table depends on which table index is currently being used. If the current record is the "first" record, it will remain the current record.

**Prior** Click **Prior** to make the record immediately "before" the current record the current record. The current table index determines which record is immediately "before" to the current record. If the "first" record is the current record, it will remain the current record.

**Next** Click **Next** to make the record immediately "after" the current record the current record. The record that is immediately "after" the current record is determined by the current table index. If the "last" record is the current record, it will remain the current record.

**Last** Click **Last** to make the "last" record in the database table the current record. The record that is actually "last" in the table depends on which table index is currently being used. If the current record is the "last" record, it will remain the current record.

- Add** Click **Add** to add a new record to the database table and toggle the table into "edit" mode. The **First, Prior, Next, Last, Add, Delete** and **Edit** buttons will be disabled. The **Save** and **Cancel** buttons will be enabled. Also the **Close** button on the form will be disabled.
- Delete** Click **Delete** to remove the current record from the database table. You will be asked to verify that you really want to delete the record before it is actually deleted. The **First, Prior, Next, Last, Add, Delete** and **Edit** buttons will be enabled. The **Save** and **Cancel** buttons will be disabled. Also the **Close** button on the form will be enabled.
- Edit** Click **Edit** to toggle the table into "edit" mode so that you can make changes to information for the current record. The **First, Prior, Next, Last, Add, Delete** and **Edit** buttons will be disabled. The **Save** and **Cancel** buttons will be enabled. Also the **Close** button on the form will be disabled.
- Save** Click **Save** to save any information added or edited on the window for the current record in the database table. **Note: Changes or Edits made on the form for the current record are NOT saved in the database until the Save button is clicked!** The **First, Prior, Next, Last, Add, Delete** and **Edit** buttons will be enabled. The **Save** and **Cancel** buttons will be disabled. Also the **Close** button on the form will be enabled.
- Cancel** Click **Cancel** to discard any information you changed on the window. The record is not updated and, if editing an existing record the information for the record is redisplayed. The **First, Prior, Next, Last, Add, Delete** and **Edit** buttons will be enabled. The **Save** and **Cancel** buttons will be disabled. Also the **Close** button on the form will be enabled.
- Close** Click **Close** to close the current window and return to the previous window. To enable this button, you must click **Save** or **Cancel** on the **Database Navigation Toolbar**.

## ENTRY FORMAT

The **Tab Key** the **TAB** key moves you through the fields and acts as an **<Enter>** or **Save button**. To enter Data Fields—Left Click, Type and Tab.

Customer's First Name:

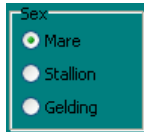
**Combo Box or Drop Down Fields** -- Left Click the down arrow and select + or arrow box -- If your selection is not available and you wish to add another choice Left Click, enter information and save. Then reselect.

Customer Location:

**3D boxes**—Left Click. A new window or information will appear.



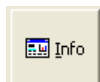
## Radial Buttons-- Choose and Left Click



**Grid Tables** – Tables are available in: Activity List, Customer Addresses, Horse Registrations/License, and Breeding Activity/Evaluation History. Left Click to select the Row and Record. Right click for adding or editing information.

Certificates of Registration/Licenses:				
ID #	Association/Breed	Registered Name	Reg. Owner ID	Reg. Owner Name
4848948	AQHA   American Quarter	Allison Alley	45166322	Allison Smith

**"Info"** – button allows you to access and print all information about this customer or horse.



The **Remind Next** feature allows you to build an Activity Reminder and Provider Activity Report for future scheduling, and records the ACTIVITY on the HiMARKS™ main window screen.



**"Active vs Inactive"** horses and customers. An Active horse or customer will appear in record lists so that you may add, edit or delete information. Inactive horses or customers must be Departed in Inventory, and have no OPEN transactions. Once "Inactive" the horse or customer will no longer appear on lists for selection, the data is still stored in the system and may be made "Active" at any time.

## F1, Prompts, Warnings, Exceptions and Errors

**"F1" is instant HELP.** Press the F1 function key on your keyboard for complete **Help** instructions and explanations for the page you are viewing.

**"Auto" prompts:** Mouse placement or cursor placement prompts instructions to appear in the bottom left of your screen in the yellow bar and "Pop Ups" on the screen. You may disable "Pop Ups" in Stables Defaults.

**"Warning" messages:** The program may prompt you with a "warning" that indicates that you should enter certain fields or consider options before proceeding. These warnings are designed to help you and often contain helpful hints. Read the message completely before making a decision.

**"Exception or Error" messages:** These messages may occur when information needed to perform certain operations is missing or has been entered incorrectly. HiMARKS is confused and unable to process your commands. CLOSE HiMARKS and return to the desktop. (Your saved information will not be lost.) Reenter and try processing the information again. If closing and reentering does not stop the error message, review your data for errors or omissions. If you can not locate the data entry error, contact customer support.

#### RECOMMENDED ORDER FOR ENTERING DATA IN YOUR DATABASE:

**Menu Bars** HiMARK\$ has two (2) menu bars that allow you to navigate to different screens or windows for data entry and reporting. Both menu bars are located on the HiMARK\$ main window or menu page. This page contains the Activity Calendar and menus. It is the first page you will see after you enter your password.

**Menu 1** is at the top of the page running left to right. This menu contains all menu items for window access. File – Report Writer – Help windows are accessed only through this menu bar.

**Menu 2** is arranged to the left of the Calendar. **We recommend that you use this menu to move sequentially through the data entry process.** We call this our **“Drawer System”** and this drawer system is set in a manner that helps you progress step by step through the program and the entry process. Each Drawer Tab – Setup, Maintenance, Billing, Worksheets, Reports and Utilities - represent a drawer and inside each drawer are folders and files represented by different windows in the program. The Drawer System is an imaginary outline of the HiMARK\$ program. Clicking through the drawers from top to bottom will navigate you through the program from beginning to end.

#### HiMARK\$ Menus

##### 1) **FILE-**

- a) **Database Open/New** - HiMARKS comes with a practice database for evaluation purposes called "PRACTICE". Your ranch or farm must have its own database. HiMARKS™ allows you to create and maintain multiple databases.
- b) **Database Utilities- BACKUP and RESTORE and PACK.**
  - i) The **BACKUP** stores and saves your current working database in a separate additional folder. A daily backup is recommended. Always BACKUP your data prior to processing invoices. Backup often.
  - ii) **RESTORE** is an “undo” and will restore your working database to the last changes and data stored in your BACKUP folder. RESTORE is used in the event major errors have been created in the working database and the backup database information is needed to

##### 2) **SETUP Drawer Tab-**

- a) **Passwords Folder–** Use the password we provided, **“himarks”**, for the initial setup. See **HELP** for password changes.
- b) **Stables Folder-**
  - i) **Stables Information** Once you have created your own database, your farm or ranch information must be entered in Stables Information. Information entered here will print on invoices and reports.

- ii) **Stables Defaults**
    - i) **Late Payment Settings** – Establish default settings that set your TERMS of payment and information to be printed on invoices.
    - ii) **Sort Horses on Transaction Entry** – Allows you to choose your sort preferences.
    - iii) **Show “Pop Up” hints** – Enable or Disable these helpful hints.
    - iv) **Gestation Period** – Defaulted at 340 days. Gestation period establishes Anticipated Foaling Date reporting.
  - c) **Validated Codes Folder** – These codes allow you to customize many selection lists that we have provided for you. For example: Horse Color or Horse Breed. Changes in Validated Codes are not required during the initial setup.
  - d) **Postal (Zip) Codes Folder** – This index is created as you enter customer zip codes in Customer Maintenance/Addresses. In the event a code was entered and saved incorrectly, Postal (Zip) Codes may be edited through this window.
- 3) **MAINTENANCE Drawer Tab** – Click on the Maintenance drawer tab on the left side of the main calendar window. Maintenance files are the heart of the data entry. These folders contain the bulk of the information or files that HiMARK\$ depends on to produce reports and create invoices. The following folders are in this drawer.
- a) **Services & Fees Maintenance.** Add, Edit or Delete services and fees. This is your pricing guide. You should print the master list created by HiMARK\$ before you set your farm fees and costs. Click **Reports tab ==> Services Report** to run the report. Use this report as a worksheet during the setup process. After you are setup, print the report for reference.
    - i) **IMPORTANT note for setting services and fees:** BOARD services are of two types or subcategories. They are Boarding and Mare Care. If your business services combine Boarding and Training in one service, for example, “Monthly or Daily Training and Board”, these services **MUST** be entered as a BOARD service. BOARD services are selected when a horse is entered in Inventory to determine the selected horse’s type of care. BOARD services and fees are the only category of services that must have a charge fee created prior to entering horses in the system. All other services and fees may be entered as needed.
  - b) **Customers Folder.** Customer Information. Customers are considered all persons that own horses and/or you provide services to. Include farm owners.
  - c) **Horses Folder.** Horse Information.
    - i) **Required Information:** The Name, Farm Owned, Sex and Breeding status are required for all horses. These selection choices tell the HiMARK\$ system what data needs to be entered for the horse record.
    - ii) **Owners/ Bill to: File** Information- All horses must have an owner or "bill to" customer(s) and the % amount to be billed. HiMARKS™ will split bills.

- i) **Inventory/Location Maintenance File.** ALL HORSES must be entered in Inventory. A new inventory record should be created for each Arrival and Departure of the horse. The information to be entered is determined by whether the horse is farm owned or customer owned. **Any billed animal is considered Contract or Customer owned.**
  - ii) Arrival Date is required for all "on farm" horses.
  - iii) Customer Owned, Contract Type, Contract Date and Board Service and Description fields are required to invoice ("bill") customers.
  - iv) Farm Owned Purchase and Sale information is optional.
  - v) Departure Date determines the end of services for that inventory period.
  - iii) **Breeding-** The breeding "yes" for mares and stallions in required information allows you to enter activity data in BREEDING history. Booked to: Stallion, teasing, foaling, shipping, collection and other breeding records are maintained here.
  - iv) **RTC Results-** Riding, Training and Competition data templates are created and stored
  - v) **Care-**Health and Veterinary Care Review and Evaluation/Vaccine Detail Entry. Care records are created through Transaction Entry. Care records may be printed from this screen.
  - vi) **Registration/Membership - Horse Registration information is required for Breeding animals.** This information is mandatory for Stallion Breeding Reports and the Stallion "Booked to" Report and Shipped Semen Forms. Owner membership information is maintained through Organization Memberships Folder.
  - vii) **Markings - Coggins and HYPP – Pedigree – Programs – Insurance - Notes-** are all optional information files.
  - viii) **Stallion Fees-**"On Farm" stallion service fees- Stallion Code Name are entered here and recorded in Services and Fees for billing.
  - ix) **"Info" or Horse Explorer.** –Located in Customer Maintenance, Horse Maintenance and Breeding History. The "Info" Explorer lets you view and print individual Customer and Horse Maintenance Reports for Health Care, Boarding, Owners and Breeding information.
- d) **Agents/Auctions Folder-** Optional data for Sales and Purchases
  - e) **Horse Care Providers Folder - Required** for tracking scheduled and completed CARE and ACTIVITIES and for entering many services through Transaction Entry. Only the first data field must be entered to add a Provider to the list. All other information about a provider is optional.
  - f) **Organization Memberships Folder** – Information on Breed Registry Memberships. Registration title and membership numbers are stored here for owners. This information is initially entered through Registrations/Licenses in Horse Maintenance.
- 4) **BILLING Drawer Tab** – Left click on Billing tab to access windows and the areas for entering and reviewing transactions, entering payments and credits, creating late payment charges, creating and printing invoices, and printing accounting reports.

- a) **Transaction Entry** - The billing process begins here. Horse Information and Customer Information must be entered in the system prior to creating transactions. **All Services and Fees for all horses and customers are considered transactions in HiMARK\$.**
    - i) All Contract (Billed) Customers and Contract (billed) horse services and fees (Charges) are first sent to TRANSACTION REVIEW for future billing and then to Invoice Processing for final billing. Health Service and Vet Service transactions are recorded in the Horse CARE file. All Charges and Costs entered in Transaction Entry are reported to Revenue and Cost Analysis reports.
    - ii) Farm owned horse "Costs" are recorded in Cost Analysis reports. Health Services and Vet Services for Farm Owned horses are recorded in the Horse Care file.
  - b) **Transaction Review** – Review recent transactions prior to processing the invoice or "billing" the customer. Only a contract horse or customer with a billing % on file will have transactions in Transaction Review. You may Add new, Edit or Delete unbilled transactions from Review. Once approved (billed) in Invoice Processing the transactions are removed from Transaction Review to the customer invoice and then to Invoice History.
  - c) **Payment/Credit Entry**-Payment entry and payment history information
  - d) **Invoice Processing-**
    - i) **Create Late Payment Charges-** generates late payment charges for specified invoices as designated by the terms in Stables Set Up. Late Payment charges are recorded in Transaction Review as unbilled charges until an invoice is created.
    - ii) **Create Invoices-**Create all or selected invoices for new "unbilled" transactions or charges listed in Transaction Review. Apply and post payments and credits to invoices or receipts. Lists late payment charges. Print or Preview created invoices. Approving or Disapproving created invoices completes the processing procedure. Approved invoices are recorded in Invoice History. Disapproved invoices are not recorded.
  - e) **Invoice History**-View processed ("billed") invoices and status of accounts. Once in History the invoice may be previewed and printed, but not edited.
  - f) **Customer Statement** – Print a customer statement by invoice and payments
  - g) **Revenue Report Accrual**
  - h) **Revenue Report Cash Basis**
  - i) **Aging Report**
- 5) **WORKSHEETS** Drawer File
- 6) **REPORTS** Drawer File
- a) **Activity Reminder** – Prints the Scheduled or Completed Activity list created through the **REMINDEX** or **DAILY ACTIVITY** calendars.
  - b) **Address Labels** – Select and Print Customer and Farm address labels
  - c) **Anticipated Foaling Date** –Print "On Farm" mare foaling schedule

- d) **Association Reports**—AQHA, APHA and General Stallion Breeding Reports by year for chosen stallion
  - e) **Booked to**—lists all mares booked to chosen stallion in chosen year. Last bred date and results of breeding.
  - f) **Breeding Info**—lists all "breeding" mares on farm by year and a brief breeding history
  - g) **Cost Analysis** – Reports direct expenses or costs for a specific customer or horse
  - h) **Customer List** – provides location, bill to and shipped to information for customers and lets you sort and print by different customer criteria
  - i) **Customer Phone Directory**
  - j) **Departed Horses** – lists departed horses, their last boarding service description, last date billed and days on farm
  - k) **Farm Owned Inventory**—lists horses and details about location, type of acquisition (purchased, contract, raised, leased, etc.) and disposition for horses by category.
  - l) **Horses Info Report**—lists owner and horse info for all horses
  - m) **On Farm Boarding/Inventory** – lists all horses currently on the farm. The horse contract type, Arrival Date, Location, Last boarding service description, Last date billed thru, and their location
  - n) **Postal (Zip) Codes**—a list of all Zip Codes you have entered into your system.
  - o) **Provider Activity**—allows you to view a list of services and activities performed by selected Provider. Tracks completed tasks entered through Transaction Entry by provider, category and subcategory.
  - p) **RTC Results** – prints results from RTC templates
  - q) **Services Report**—lists Categories, Subcategories, Service Codes, Service Descriptions, Unit of Measure, Fee Charges and Fee Costs for all services and fees listed in Services and Fees Maintenance. This is your "Service List" for Transaction Entry.
  - r) **Validations**—a list of codes and categories that help run your system.
- 7) **UTILITIES Drawer Tab** – Utilities are "fix it" programs for the HiMARK\$ system. These programs should be accessed only with consultation from HiMARK\$ support.
- 8) **Report Writer.** Located on Menu 1. This component allows you to create and print your own reports by establishing a query from the data within the system. Reports may be saved. Report Writer is currently under construction and not available.
- 9) **HELP.** Located on Menu 1
- a) **Help Index** – All Help Text may be accessed through Help.



b) **About** – Provides information about the HiMARK\$ Program and Database

About this Help file and Getting additional Help

Window-level Help is available on each window in this software. Press F1 to open the Help file.

These buttons will make it easy to navigate from one procedure to another.

There are several ways you can locate information. You can use the **Contents** pane like the Table of Contents in a book, you can type the keyword you are looking for on the **Index** tab, you can search the entire online Help system by typing the words you are looking for on the **Find** tab.

You can also access help text under the **Help** menu on the main window.

HiMARKS™ **Installation Instructions** are available in your HiMARKS™ Program file. And at <http://www.HiMARKS.net>

The **HiMARKS™ MANUAL** is available in PDF format. If your system does not have a current Acrobat Reader Program, HiMARKS™ also includes this program for installation. To access the files, click **Start ==> Programs ==> HiMARKS ==> HiMARKS Documentation**.

**HiMARKS™ WEBSITE REPAIR**

<http://www.HiMARKS.net>

Once a problem is reported to the Programming Desk, we will make every effort to have the repairs made as soon as possible. HiMARKS™ "fixes", "patches" and "repairs" through our website at no expense to you. The instructions and downloads are found at [www.HiMARKS.net](http://www.HiMARKS.net) You will be notified by email and or a personal telephone call when your software requires free upgrading or repair.

**CONTACTING THE HELP SUPPORT DESK**

**CUSTOMER SERVICE** at [www.himarks.net](http://www.himarks.net) or e-mail [info@himarks.net](mailto:info@himarks.net)

(816) 625-8533 Monday thru Thursday. **days/evenings** (CST 9:00 A.M. to 6:00 P.M.) Friday until noon.

Weekend or evening support is available by appointment.